
ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2018

— arabyouthsurvey.com —

10 YEARS OF
ARAB YOUTH
SURVEY

A

Algeria	Jordan	Morocco	Saudi Arabia
Bahrain	Kuwait	Oman	Tunisia
Egypt	Lebanon	Palestinian Territories	UAE
Iraq	Libya	Qatar	Yemen

DECADE OF
HOPES &
FEARS

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The Arab Youth Survey 2018 is
dedicated to the Arab world's
200 million youth

Special thanks to:

PSB Research 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 Decade of Hopes & Fears”

A White Paper on the findings of the
ASDA'A Burson-Marsteller Arab Youth Survey 2018

Published in 2018 by ASDA'A Burson-Marsteller

This White Paper can be obtained from the
ASDA'A Burson-Marsteller Arab Youth Survey
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The Arab Youth Survey at 10: bearing witness to the sweep of history in the Middle East



Sunil John

Sunil John is the founder of ASDA'A Burson-Marsteller and President, Middle East, of Burson Cohn & Wolfe. He has been at the heart of the public relations business in the Middle East for more than two decades. During this time, he has shaped ASDA'A Burson-Marsteller to be the benchmark public relations consultancy in the Arab world. He also leads the agency's research arm, PSB Middle East, and its branding and digital marketing subsidiary, Proof Integrated Communications. Sunil is the first PR professional in the Middle East to receive the Outstanding Individual Achievement SABRE Award in the EMEA region from The Holmes Report.



Every year, we provide evidence-based insights, giving governments, the private sector and civil society institutions critical information and analysis to inform decision-making and policy formation. Ultimately, we are gaining a better understanding of the region and, by putting the information in the public domain, we are building bridges between the Middle East and international communities, businesses and NGOs who want to know what the region's youth really think and how they want to shape their future.

If a political scientist were to write a thesis on what caused the Arab Spring, he or she could save themselves a lot of trouble and just read the 2010 Arab Youth Survey. Before the protests began in Cairo's Tahrir Square, our Survey had telegraphed all the warning signs. The calls for democracy had moved to the top of the agenda in many countries, coupled with deep concern at the rising cost of living. The gap between the rich and poor was seen as widening, and many young Arabs in countries such as Egypt expressed little faith that their nations had made any kind of recovery from the global financial crisis.

As the protests peaked in 2011, our Survey that year showed a surge in optimism: young Arabs felt their future was bright.

The immediate years after the Arab Spring, however, saw those hopes fade. In later years, amid the rise of Daesh – itself a phenomenon that our Survey suggests was fueled by a lack of opportunities for youth – a desire for security and safety replaced calls for democratic reforms. Kitchen table issues, specifically well-paying jobs and a modern education system, returned to the fore in our annual Survey.

This year, the annual ASDA'A Burson-Marsteller Arab Youth Survey turns ten. We have been accurately tracking the hopes, aspirations and fears of Arab youth for a decade now. While our first survey in 2008 was received with a mix of curiosity and suspicion, it laid the groundwork for subsequent Surveys and, more importantly, caught the interest of governments, business and media the world over.

After all, this is a young region – 65 per cent of the population of the Middle East is under the age of 30. What young people think about their futures, their careers, their families, their governments; their role models, what media they consume; how they wish to spend their money – all this is important to every government, every business and every institution operating in this complex region.

Surveys generally tell you one of two things: what you already know, and what you should know. If our first Survey, in hindsight, tended towards the former, the subsequent ones are very much the latter. Every year, we provide evidence-based insights, giving governments, the private sector and civil society institutions critical information and analysis to inform decision-making and policy formation.

Ultimately, we are gaining a better understanding of the region and, by putting the information in the public domain, we are building bridges between the Middle East and international communities, businesses and NGOs who want to know what the region's youth really think and how they want to shape their future.

Every year, we are invited to meet with senior government and private sector decision-makers across the region and beyond to give them detailed briefings on the results. Besides the traditional launch event in Dubai, the Survey is presented in political circles in DC, London, Paris, Brussels and Berlin.

Unemployment: A dangerous constant in the region

GDP (PPP)



\$4.35 tr → **\$6.9 tr** **58%** ↑
2008 2018

Population



267 mn → **341 mn** **28%** ↑
2008 2018

Youth Unemployment



25.4% → **25.5%**
2008 2018



Youth unemployment in the region has been a dangerous constant throughout the history of our Survey, stubbornly holding at 25 per cent. In addition, it is not well-known that 85 million adults in the Middle East are illiterate. This is a real problem that governments in the region must look at seriously, because, after all, a modern education system is needed to deliver a generation of young Arabs who will be ready to take on the jobs of the future which will emerge from the 4th Industrial Revolution.

The Arab Youth Survey 2018

This year's Survey reveals that a majority of young people in the region view the legacy of the Arab Spring negatively; indeed, in those countries most affected by the Arab Spring, only youth in Tunisia mostly view it positively. That's understandable – the Spring failed to live up to the high expectations of the Tahrir Square generation. But its legacy has imprinted itself in the lives of today's youth in important ways, all of them reflected in this year's key findings. Specifically, governments appear to be listening.

Witness the stunning scope of reform we have seen in Saudi Arabia over the past year, most of which is focused on creating a better environment, socially and economically, for the Kingdom's youthful population. (And, we must say, spearheaded by a young leader, Saudi Crown Prince Mohammed Bin Salman, who, at 32, would himself have fallen within our Survey's parameters for respondents in its early years.) The UAE has appointed a Minister of State for Youth Affairs; its unstinting focus on youth is perhaps a contributing factor in that nation's continuing resonance with the region's young people as a role model and the "city on a hill".

And then there's the digital revolution. Unlike the Arab Spring, this is seen as overwhelmingly positive by Arab youth – but it must be remembered, the Arab Spring would not have happened, or at least not on the same scale, without the digital revolution. It was the rise of smartphones, new social platforms like Twitter and Facebook, and the roll-out of mobile internet across much of the region that were catalysts for those dramatic events.

If the region is to show real progress on the key concerns that thread through every single one of our 10 Surveys – jobs and education – then leaders must not just embrace it themselves, they must harness it to deliver the quality education and the well-paying jobs that the region's youth so desperately need.

Youth unemployment in the region has been a dangerous constant throughout the history of our Survey, stubbornly holding at 25 per cent. In addition, it is not well-known that 85 million adults in the Middle East are illiterate. This poses a tremendous problem that governments in the region must tackle seriously, because, after all, a modern education system is needed to deliver a generation of young Arabs who will be ready to take on the jobs of the future that will emerge in the 4th Industrial Revolution.

We're seeing real progress on this in the GCC, certainly, where governments have finally started acting on long-promised and much needed initiatives to diversify their economies from oil – their hands being forced by the crash in the price of hydrocarbons. With oil at \$70 a barrel, though, it remains to be seen whether governments will have the willpower to stick to this path, and drive through sometimes painful, but extremely critical reforms.

If they did roll back these reforms, a return to the largesse enjoyed by generations before may indeed be welcomed by many. But it is the region's long-term future that is at stake here – today's youth may thank them for easing their burdens now, but tomorrow's generations will never forgive them.

METHODOLOGY

The 10th Annual ASDAA Burson-Marsteller Arab Youth Survey 2018 was conducted by international polling firm PSB Research to explore attitudes among Arab youth in 16 countries and territories in the Middle East and North Africa. PSB conducted 3,500 face-to-face interviews from January 21 to February 20, 2018 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 the six Gulf Cooperation Council states (Bahrain, Kuwait, Oman, Qatar, 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 did not include Syria due to the civil unrest in the country.

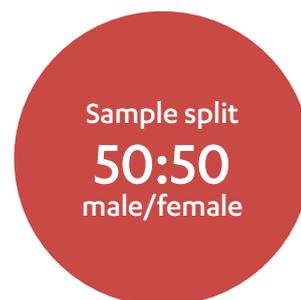
Participants were interviewed in-depth about subjects ranging from the political to the personal. Topics explored included the concerns and aspirations of Arab youth, their views on the economy, international relations, their online shopping habits and their preferred media channels.

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; Palestinian youth from the West Bank and Gaza; Oman's youth from Muscat and Batinah; Lebanese youth from Beirut, Saida and Tripoli; Tunisian youth from Tunis, Safaqis and Susah; Iraqi youth from Baghdad, Irbil and Basra; Egyptian youth from Cairo, Alexandria and Mansoura, and so on across each country. When analysed, this geographic spread provides a more accurate national picture than findings based solely on the responses of those living in capital cities.



ORIGINAL 2008 COUNTRIES								
UAE	OMAN	QATAR	BAHRAIN	KSA	KUWAIT	EGYPT	JORDAN	LEBANON
N=300	N=200	N=200	N=200	N=300	N=200	N=300	N=200	N=200
Abu Dhabi 40%	Muscat 50%	Doha 55%	Manama 100%	Riyadh 40%	Kuwait City 20%	Cairo 50%	Amman 50%	Beirut 60%
Dubai 40%	Batinah 50%	Al Rayyan 45%		Jeddah 40%	Al Hawalli 30%	Alexandria 25%	Irbid 25%	Saida 20%
Sharjah 20%				Dammam 20%	Al Ahmadi 20%	Mansoura 25%	Zarqa 25%	Tripoli 20%
					Farwaniya 30%			

NEW IN 2011	NEW IN 2012		NEW IN 2013			NEW IN 2014
IRAQ	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 50%	Algiers 50%	Rabat 25%	Sana'a 50%	West Bank 50%
Irbil 25%	Safaqis 25%	Benghazi 25%	Oran 25%	Casablanca 25%	Al Hudaydah 25%	Gaza 50%
Basra 25%	Susah 25%	Misrata 25%	Constantine 25%	Fes 25%	Ta'izz 25%	
				Marrakech 25%		

16 ARAB STATES		
GCC	NORTH AFRICA	LEVANT + OTHER
Bahrain	Algeria	Jordan
Kuwait	Egypt	Iraq
Oman	Libya	Lebanon
Qatar	Morocco	Palestinian Territories
Saudi Arabia	Tunisia	Yemen
UAE		

TIMELINE OF KEY EVENTS



October

- **Saudi Crown Prince Mohammed bin Salman vows to return Saudi Arabia to moderate Islam after announcing Neom, a US\$500 billion megacity**
- Daesh headquarters Raqqa in Syria is declared fully liberated by Syrian Democratic Forces in US-led alliance

November

- Saudi Arabia arrests 11 princes and other ministers on corruption charges; over 200 held for questioning
- Lebanese PM Saad Hariri resigns in a shock TV broadcast from Riyadh
- Louvre Abu Dhabi opens, the largest art museum in the region

December

- US Supreme Court allows Trump's travel ban to come into effect for 6 mostly Muslim countries
- **Trump recognises Jerusalem as Israel's capital, announces plans to move US embassy there; UN General Assembly votes 128 to 9 denouncing decision**
- Iraqi military declares victory over Daesh in Iraq; retakes full control of Iraq-Syria border
- Saudi Arabia announces an end to its 35-year ban on cinemas

March

- Over 12,000 people flee Eastern Ghouta, Syria, after town bombarded
- Data mining scandal hits Facebook; Mark Zuckerberg admits to having 'made mistakes'
- Vladimir Putin elected to new six-year term as Russian President
- Trump accepts invitation from Kim Jong-un to meet in May for talks on de-nuclearising the Korean peninsula

February

- UN calls for ceasefire in rebel-held Eastern Ghouta area after 40 people killed; passes resolution for 30-day ceasefire

2018 / January

- Turkey launches military offensive to capture portion of northern Syria from Kurdish forces
- Anti-government demonstrations in Iran; 30 killed

April

- **70 dead and hundreds injured after reported sarin chemical attack in Douma in Syria; US, UK and France order bombing of Syrian military base**
- Cinemas open in Saudi Arabia for the first time since 1983, premiering with Black Panther
- 2018 Land Day protests turn violent; at least 32 Palestinians killed and thousands injured in clashes with Israeli troops

TOP 10 FINDINGS

1

YOUTH SAY THE PAST DECADE – SHAPED BY THE ARAB SPRING AND DAESH – HAS LEFT THE MIDDLE EAST DRIFTING OFF COURSE

2

TO STEER THE REGION IN THE RIGHT DIRECTION, ACTION IS NEEDED ON JOBS, EDUCATION, GOVERNMENT CORRUPTION AND THE FIGHT AGAINST TERROR

3

YOUNG ARABS SEE SAUDI CROWN PRINCE MOHAMMED BIN SALMAN AS A STRONG LEADER WHO WILL SHAPE THE NEXT DECADE

4

ARAB YOUTH OVERWHELMINGLY WELCOME THE MOVE TO ALLOW WOMEN TO DRIVE IN SAUDI ARABIA, BUT SAY MORE MUST BE DONE TO ADDRESS WOMEN'S RIGHTS THROUGHOUT THE REGION

5

YOUNG ARABS ARE CONVINCED THAT DAESH – AND ITS IDEOLOGY – WILL BE TOTALLY DEFEATED

6

YOUTH ACROSS THE MIDDLE EAST INCREASINGLY VIEW THE US AS AN ADVERSARY, WHILE RUSSIA CEMENTS ITS POSITION AS THE TOP NON-ARAB ALLY

7

THE UAE REMAINS THE TOP COUNTRY ARAB YOUTH WANT TO LIVE IN, AND WANT THEIR OWN COUNTRIES TO EMULATE

8

YOUTH IN THE LEVANT HAVE AN INCREASINGLY BLEAK OUTLOOK COMPARED WITH THEIR PEERS IN NORTH AFRICA AND THE GULF STATES

9

WHILE YOUNG ARABS INCREASINGLY TURN TO SOCIAL MEDIA FOR THEIR NEWS, THEY SEE CNN AS THE MOST TRUSTED AND AL JAZEERA AS THE LEAST TRUSTED NEWS SOURCES

10

INSPIRED BY THE DIGITAL REVOLUTION, FUTURE ARAB ENTREPRENEURS TURN TO THE TECH SECTOR, WHICH OFFERS PLENTIFUL OPPORTUNITIES IN THE REGION

THE PAST 10 YEARS

1

**YOUTH SAY THE PAST DECADE –
SHAPED BY THE ARAB SPRING AND
DAESH – HAS LEFT THE MIDDLE
EAST DRIFTING OFF COURSE**

A majority of young Arabs (55 per cent) feel that the Middle East has veered in the wrong direction over the past decade, with 40 per cent believing the region has moved in the right direction.

Broken down by country and by region, the findings are starker, with the vast majority (85 per cent) of those in the Levant saying 'wrong direction', including 89 per cent of those in Lebanon, 88 per cent in Jordan and 83 per cent in the Palestinian Territories. In North Africa, youth are more divided, with 49 per cent saying 'wrong direction', and 46 per cent saying 'right direction'.

Young Arabs in the Gulf states are considerably more positive about the past decade, with a majority (57 per cent) saying things have moved in the right direction over the past ten years, while a third of GCC youth (34 per cent), say 'wrong direction'.

The two developments seen as having the biggest impact on the region over the past decade are the rise of Daesh, chosen by 22 per cent of young Arabs, and the Arab Spring, chosen by 19 per cent.

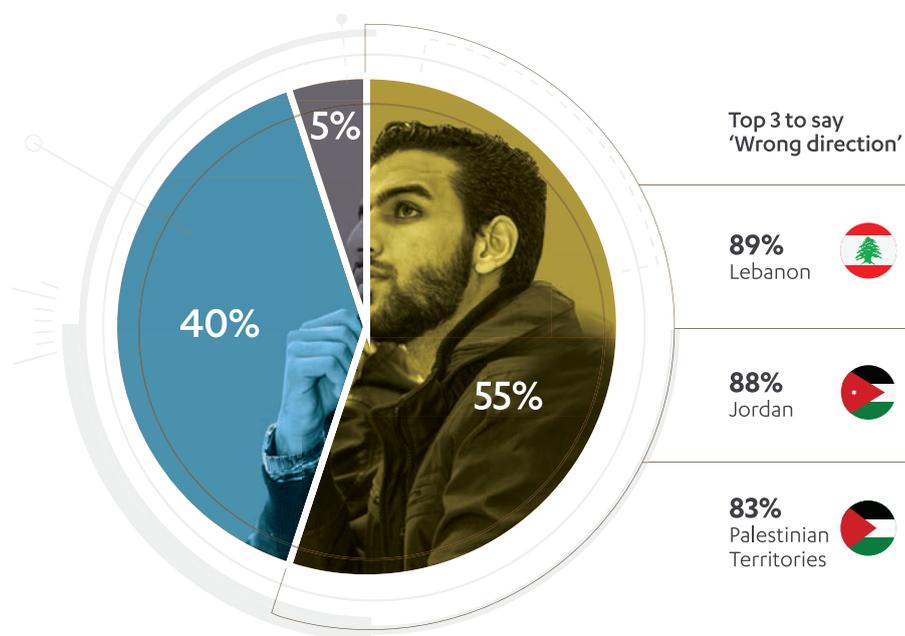
The overwhelming majority (88 per cent) of young Arabs say Daesh has negatively impacted the region, with just 4 per cent saying the rise of the terrorist group has had a positive effect on the region.

Youth across the region also view the legacy of the Arab Spring negatively, with a majority (56 per cent) saying the largely youth-led uprisings have had a negative effect on the region, compared to just a fifth (20 per cent) who say the Arab Spring has had a positive impact on the region.

Young people in the countries most impacted by the Arab Spring are divided on its lasting impact. A high proportion of youth in Egypt (52 per cent) and Yemen (50 per cent) viewed the Arab Spring negatively, while in Tunisia and Libya, 50 per cent and 42 per cent respectively saw it as a positive.

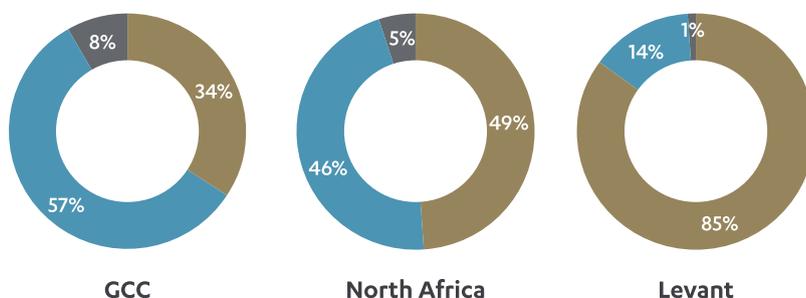
A majority of young Arabs, particularly in the Levant, say the region has moved in the wrong direction over the past decade

Would you say that over the past 10 years, things in the Arab world as a region have moved in the right direction or in the wrong direction?



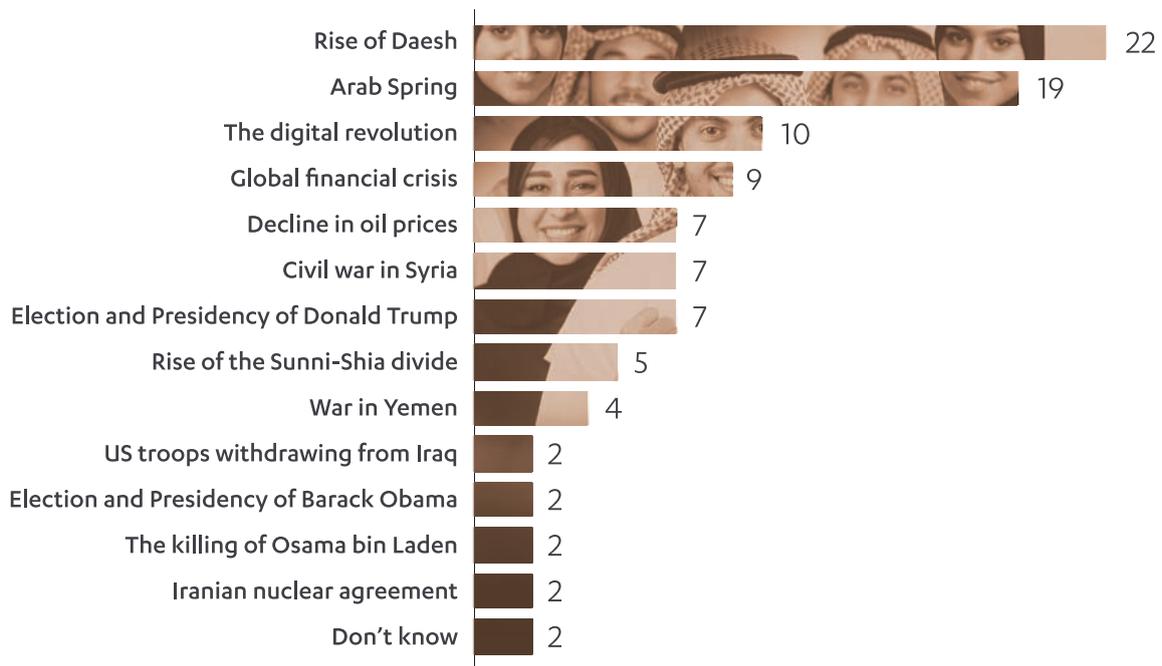
% all respondents

● Wrong direction ● Right direction ● Don't know



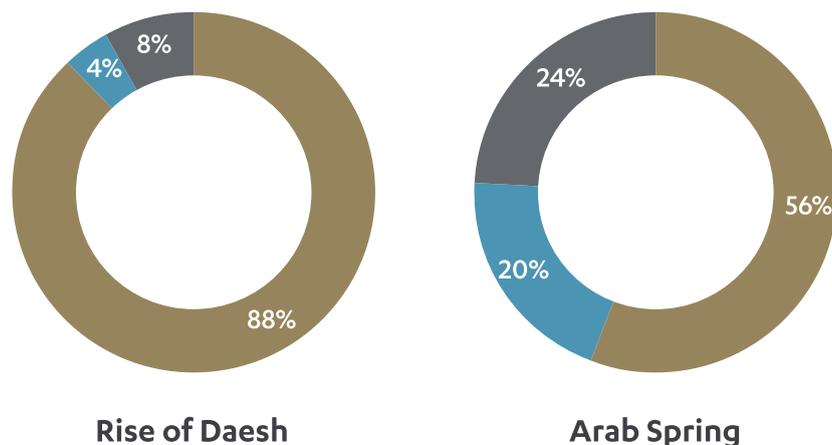
Arab youth say Daesh and the Arab Spring have had the biggest impact on the region over the past decade; both are seen to have impacted the region negatively

Which of the following events or developments that took place in the last 10 years in your view has had the biggest impact on the Arab world?



% all respondents

How positive or negative of an impact has this event or development had on the Arab world?

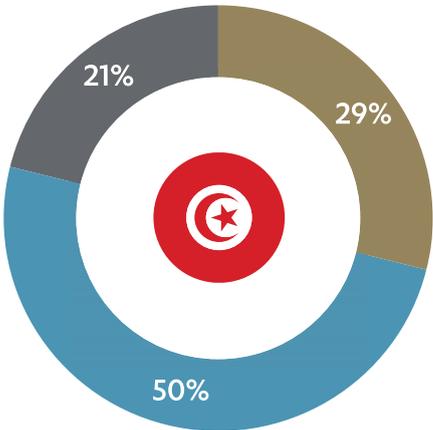


% all respondents

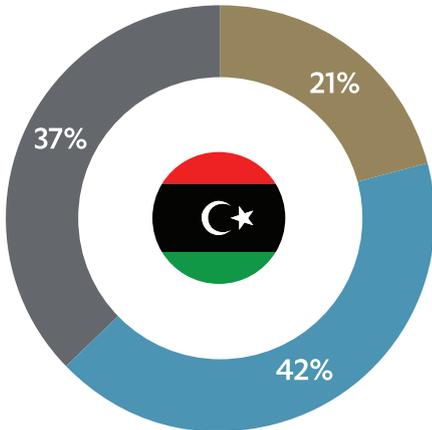
● Negative ● Positive ● Neutral

The impact of the Arab Spring is polarising even among youth living in the Arab Spring countries

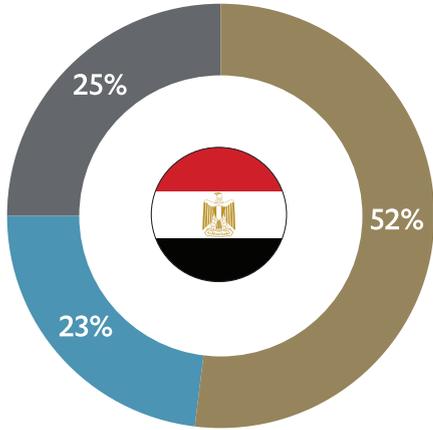
How positive or negative of an impact has the Arab Spring had on the Arab world?



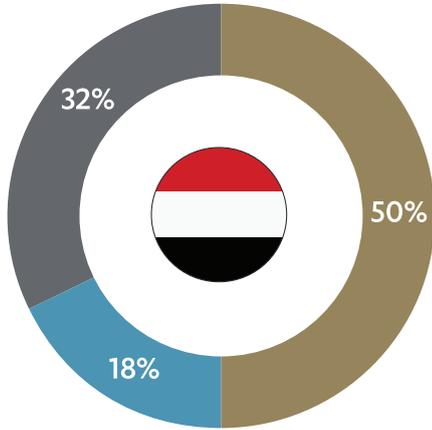
Tunisia



Libya



Egypt



Yemen

● Negative ● Positive ● Neutral

THE NEXT 10 YEARS



**TO STEER THE REGION IN THE RIGHT
DIRECTION, ACTION IS NEEDED ON JOBS,
EDUCATION, GOVERNMENT CORRUPTION
AND THE FIGHT AGAINST TERROR**

Young Arabs are clear that the top priorities needing to be tackled to move the region in the right direction are providing job opportunities, fighting corruption, modernising the education system and combating terror.

Overall defeating terrorism is cited as a top priority more frequently than any other issue, with a third (34 per cent) of young Arabs selecting it as a top priority to steer the region in the right direction. In the GCC, 41 per cent of youth say the fight against terror is a top priority, significantly higher than their peers in North Africa (31 per cent) and the Levant (29 per cent).

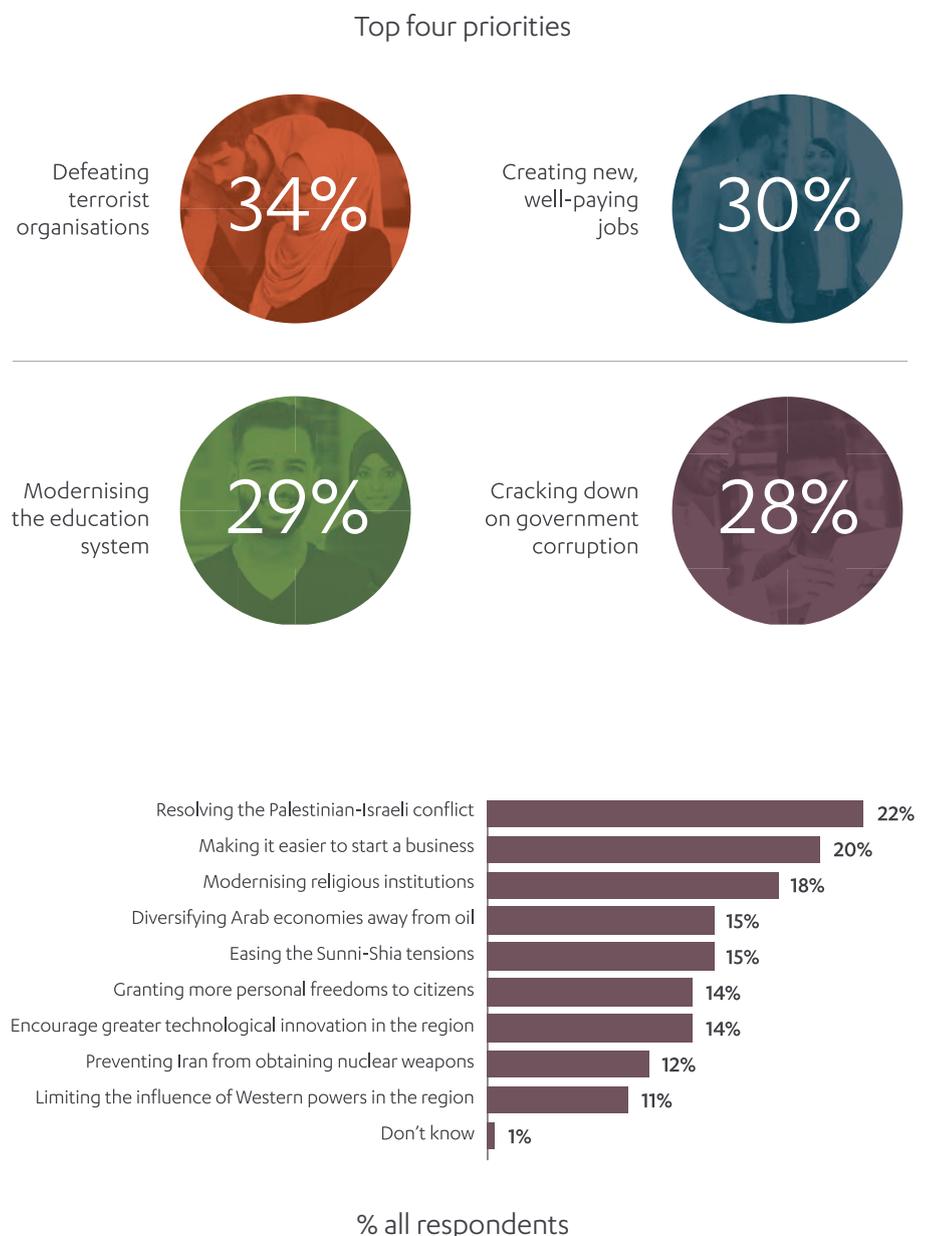
Across the Middle East, Arab youth identify employment as the second most important consideration, with 30 per cent of the respondents highlighting the creation of well-paid jobs as a top priority to move the region in the right direction over the next decade. Young Arabs in North Africa are more likely to identify jobs as a top priority (33 per cent) than their peers in the Levant and the GCC (31 per cent and 26 per cent respectively).

Modernising the education system comes in at third place overall as the most important factor to steer the region in the right direction. The issue is given equal weighting by youth in the GCC and Levant at 30 per cent each, ahead of youth in North Africa, where it was seen as a top priority issue by one in four (25 per cent).

Cracking down on government corruption is considered as the fourth most pressing concern for Arab youth in the region, chosen by 28 per cent of respondents. However, the geographical breakdown between the three sub-regions shows a marked disparity in responses, with a third (34 per cent) of youth in North Africa identifying it as priority, compared with youth in the Levant (26 per cent) and the GCC (25 per cent) who placed it fourth, a result that tallied with its overall fourth position.

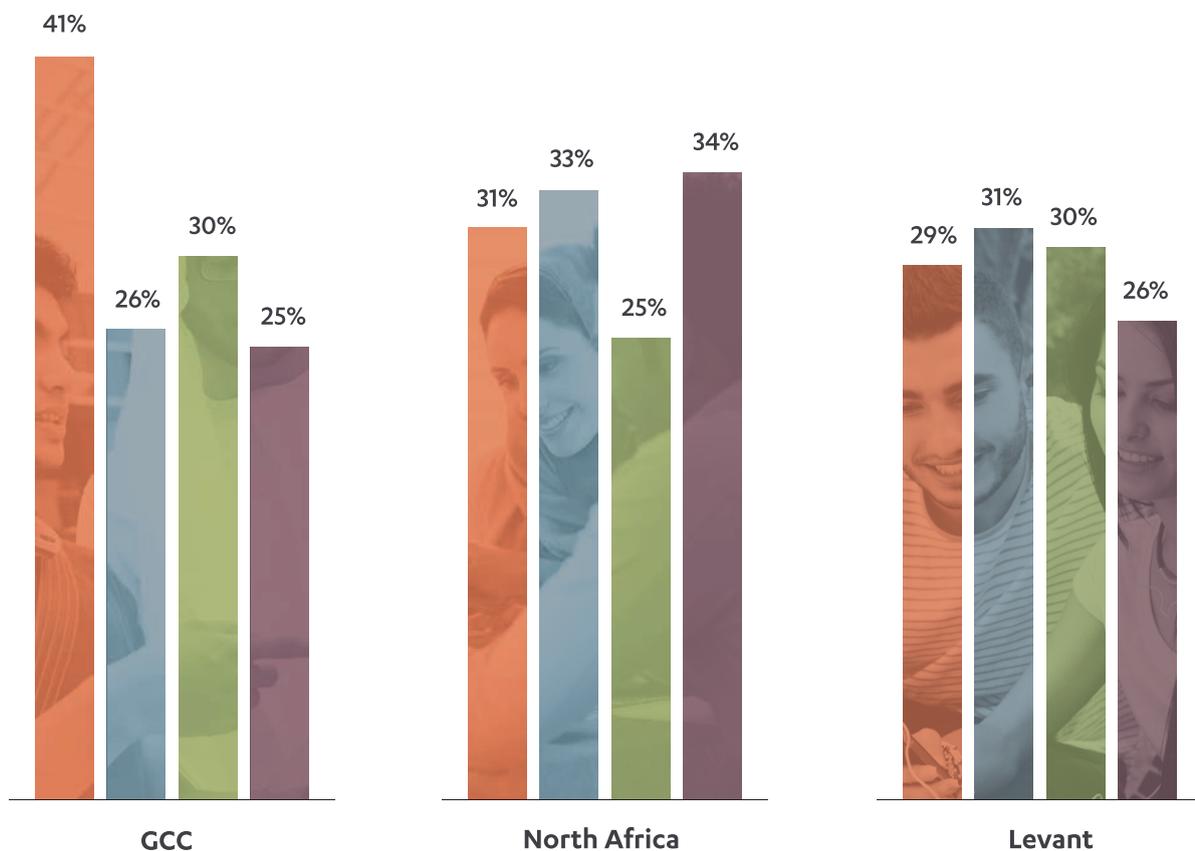
Defeating terrorism, well-paying jobs, education reform, and fighting corruption are seen as the top priorities to move the region in the right direction

Now thinking about the next 10 years, which of the following, if any, are the most important things necessary for the Arab world to move in the right direction?



Defeating terrorism is the strongest priority among GCC youth, while young Arabs in North Africa are more likely to want the focus to be on fighting government corruption

Now thinking about the next 10 years, which of the following, if any, are the most important things necessary for the Arab world to move in the right direction?



- Defeating terrorist organisations
- Creating new, well-paying jobs
- Modernising the education system
- Cracking down on government corruption

Youth search for new dawn as Great Shift turns to Great Drift



Afshin Molavi

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. He is co-director of the emerge85 Lab, a newly launched initiative aimed at examining the key economic, commercial, and cultural drivers of change across Latin America, Asia, and Africa. 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.



Young people overwhelmingly reject terrorist groups, like Daesh. Young people want greater government accountability and transparency. They want jobs. They want modernised education systems. They want opportunity. They prefer to stay in their home country and build it, rather than leave. They want hope. They want dignity.

THE PAST 10 YEARS

Taha al Shazli wanted two things: a job and a sense of dignity. He received neither when he was unceremoniously dismissed from possible entry to the Cairo police academy school because of his father’s “lowly” station as a security guard.

When he lamented his fate to his friend Busayna, a weary-beyond-her-years teenager who was a victim of numerous assaults, she gave him some advice: use your good grades to go to university, then “go off to an Arab country and earn some money, then come back here and live like a king”. She went on: “This country doesn’t belong to us, Taha. It belongs to the people who have money. If you’d had twenty thousand pounds and used them to bribe someone, do you think anyone would have asked about your father’s job? Make money, Taha, and you’ll get everything but if you stay poor, they’ll walk all over you.”

That exchange, laden with pathos, from Ala’a Al Aswany’s emotionally searing and celebrated 2004 novel, *The Yacoubian Building*, was all too recognisable for many young Arabs from poorer backgrounds in North Africa. It did not matter that Taha al Shazli was a talented and hard-working student. It did not matter that he aced the academy entrance exams. He had neither baksheesh (money for a bribe) nor wasta (connections), and so he was out of luck, and his best hope was to leave.

Later that evening, Taha al Shazli began writing a letter to the President of Egypt to directly complain about his unfair treatment. Later, too, in the novel, after being detained and beaten by police, Taha found his way towards Islamist radicalism.

For many young Arabs in the Levant and North Africa, Busayna’s resignation and Taha’s anger rings all too familiar. Of course, most do not join radical movements. Rather, they emigrate, or eke out a living, or live lives of squandered potential. The Arab Uprisings (the term “Spring” can hardly be used for the killing fields of Syria) brought great hope in those early years, but has led to varying degrees of disappointment.

Indeed, as the latest Arab Youth Survey shows, an astonishing 56 per cent of young Arabs view the Arab Uprisings as a negative development, and only one out of five see the so-called Arab Spring as positive. Young Tunisians and Libyans are the most enthusiastic about the effects of the “Arab Spring”, with 50 per cent and 42 per cent respectively seeing the events as positive. Among young Egyptians, however, less than a quarter view the Arab Uprisings as a positive event, and a full 52 per cent see it as negative.

We have come a long way from the heady days of Tahrir Square, when a new world seemed to be dawning. The Great Shift that the Arab Uprisings promised has instead led to a Great Drift.

In a searingly honest article, one of the heroes of the early days of the uprising in Egypt, the former Dubai-based young Google executive Wael Ghonim, wrote recently of the fading allure of the Arab Spring and his own personal depression since leaving Egypt.



There has been too much hesitation. Arab governments have largely failed their youth, and their “revolutions” have been disappointing, but I will not bet against the promise of Arab youth. There is a moment, today, without hesitation, when the promise of Arab youth can be channelled into results. For the Taha al Shazlis and the Busaynas of the Arab world – and beyond. Or it can be lost, swirling amid the Great Drift.

“But just as quickly as it had risen, the high of the Arab Spring began to fade,” he wrote. “Power corrupts even those with the best intentions, and I saw it do so every day. I lived it. The opposition groups were blinded by the January 25th victory. They didn’t trust each other and lacked empathy. Sometimes I found myself lacking empathy too. We were all practicing one form or another of what we criticised the Mubarak regime of doing.”

For Wael Ghonim, however, there was, to borrow from the technology world he inhabits, an exit strategy. Well-educated and globalised, he could leave Egypt and find his new place in the world, in Silicon Valley or a Harvard University fellowship as he did. For the majority of young Egyptians, such exit strategies are pipe dreams.

THE 10 YEARS TO COME

Unemployment remains a persistent problem. On the eve of the Arab Uprisings, the Middle East and North Africa region had the highest youth unemployment rate in the world, hovering near 25 per cent. Today, after seven years of dizzying change and dramatic geopolitical shifts, one thing has remained stubbornly constant: a youth unemployment rate of 25 per cent.

There is no bigger challenge to the future of the Arab world than the jobs challenge. Young people understand this. They have been crying out this familiar refrain for the ten-year life of the Arab Youth Survey, and before. And for the past ten years, Arab governments have largely failed to deliver.

In the most recent survey, North African youth point to the need to create “new, well-paying jobs” and “cracking down on government corruption” as their top two priorities. Youth in the Levant agree on the need to create “new, well-paying jobs” – it comes in as their top wish.

Creating jobs in an era increasingly driven by automation and robotics will be the challenge of our global era, but it is a challenge that must be met. The levels of frustration seen among youth in North Africa and the Levant are unsustainable both politically and morally.

Young people in the Levant are strikingly frustrated about the fate of their region. In overwhelming numbers, young people from Lebanon to Jordan to the Palestinian Territories believe the Middle East region is going in the wrong direction: a full 85 per cent of youth. This contrasts sharply with youth from the Gulf Cooperation Council (GCC) countries with a majority positive outlook toward the direction of the region and a more evenly divided split among North African youth.

Indeed, the 2018 Arab Youth Survey shows us, once again, the stark divide between the youth from “Gulfistan” and the rest. The poll findings reflect that young people in the GCC are seemingly living in a different world than their peers elsewhere. This, too, is unsustainable.

On the tenth anniversary of the Arab Youth Survey, leaders from across the Arab world now have a decade of survey data to understand what their youth want. Amid this wealth of data, good news emerges even amid the cries for support. Young people overwhelmingly reject terrorist groups, like Daesh. Young people want greater government accountability and transparency. They want jobs. They want modernised education systems. They want opportunity. They prefer to stay in their home country and build it, rather than leave. They want hope. They want dignity.

These are reasonable demands, familiar to young people from Africa to Asia to Latin America. A detailed examination of a decade of Arab Youth Survey findings reflects a young Arab population that is frustrated but pragmatic, hungry for meaningful work, and dubious of utopianist solutions.

There is a moment at the very end of the 1962 Naguib Mahfouz novel, *The Autumn Quail*, set in the post 1952 Egyptian Revolution environment, amid the fading allure of that movement, when a former senior civil servant comes face-to-face with a young man he once jailed. The young man sought him out in a Cairo square under the statue of Saad Zaghlul, a prominent late 19th and early 20th century Egyptian revolutionary and statesman. The young man wanted to talk, but the drunken former civil servant only saw menace in him, and dismissed his efforts at discussion.

When the young man slinked away, the former civil servant had second thoughts and ran after him. “I could catch up to him, he thought, if I didn’t waste any more time hesitating,” Mahfouz wrote.

There has been too much hesitation. Arab governments have largely failed their youth, and their “revolutions” have been disappointing, but I will not bet against the promise of Arab youth.

There is a moment, today, without hesitation, when the promise of Arab youth can be channelled into results. For the Taha al Shazlis and the Busaynas of the Arab world – and beyond. Or it can be lost, swirling amid the Great Drift.



**YOUNG ARABS SEE SAUDI CROWN
PRINCE MOHAMMED BIN SALMAN AS
A STRONG LEADER WHO WILL SHAPE
THE NEXT DECADE**

Young Arabs throughout the Arab world express a high level of confidence in Mohammed bin Salman, the recently appointed Crown Prince of Saudi Arabia. Two-in-three (63 per cent) of the young Arabs say that they support his appointment as Crown Prince. A similar number (64 per cent) say he is a strong leader, while nearly two in three (59 per cent) say Mohammed bin Salman will steer Saudi Arabia in the right direction.

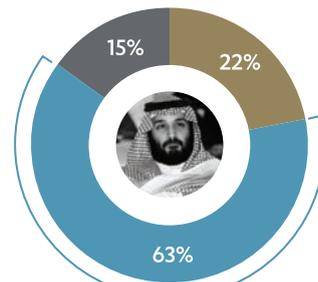
Support for the new Crown Prince among Saudi youth is overwhelming, with 91 per cent of young Saudis supporting his appointment, 97 per cent considering him a strong leader, and 90 per cent saying he will move the country in the right direction. A similar number, 94 per cent, also support the Crown Prince's recent anti-corruption drive targeting business leaders and senior members of the royal family. More than 9 in 10 (92 per cent) Saudi youth say that they are confident that the Crown Prince's Vision 2030 programme of social and economic reforms will be a success.

Arab youth as a whole also support the Crown Prince's anti-corruption campaign, with 86 per cent saying they are in favour of the campaign. Backing for the campaign is strong across the region, with 89 per cent of youth in the GCC, 85 per cent in North Africa, and 83 per cent in the Levant expressing support for the crackdown.

When asked which leader will have the biggest impact on the Arab world over the next decade, Mohammed bin Salman is cited more frequently than any other Arab leader, with 15 per cent of young Arabs saying the Saudi Crown Prince will be the most influential leader over the next decade. The expectations of Mohammed bin Salman shaping the region are particularly high in the GCC, where 25 per cent see him as the most influential leader in the next decade.

Young Arabs express a high level of confidence in Saudi Crown Prince Mohammed bin Salman and his leadership

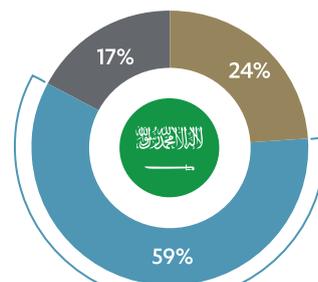
To what extent do you support or oppose the Saudi King's decision to appoint his son Mohammed bin Salman as the new Crown Prince?



KSA youth
91% say 'support'

● Support ● Oppose ● Don't know

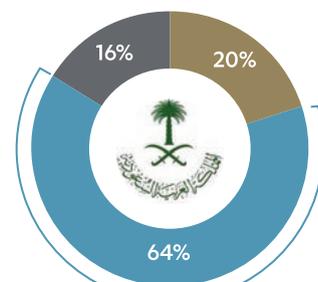
Do you think Mohammed bin Salman will take Saudi Arabia in the...?



KSA youth
90% say, 'right direction'

● Right direction ● Wrong direction ● Don't know

How strong or weak of a leader do you think Mohammed bin Salman is?

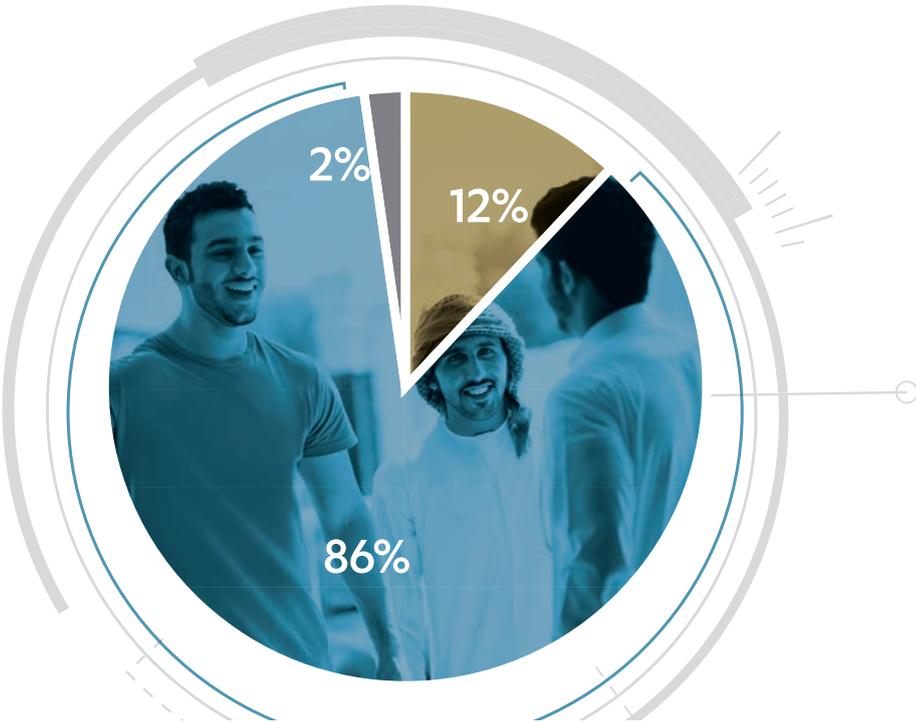


KSA youth
97% say, 'strong leader'

● Strong ● Weak ● Don't know

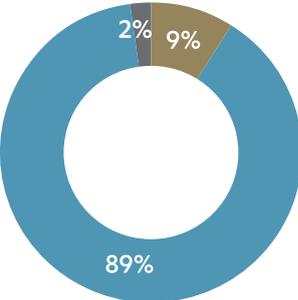
Arab youth across the region overwhelmingly support Saudi Crown Prince Mohammed bin Salman's anti-corruption campaign

To what extent do you support or oppose the Saudi government's anti-corruption measures?

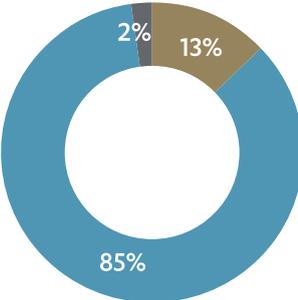


KSA Youth
94% 'support'

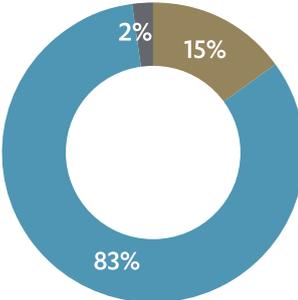
% all respondents



GCC



North Africa

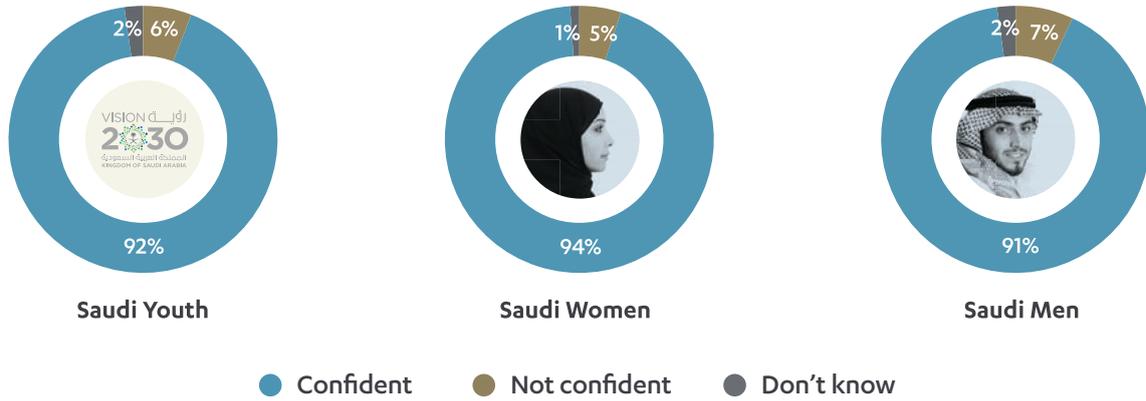


Levant

● Support ● Oppose ● Don't know

Young Saudis are highly confident that Saudi Crown Prince Mohammed bin Salman's Saudi Vision 2030 will be a success

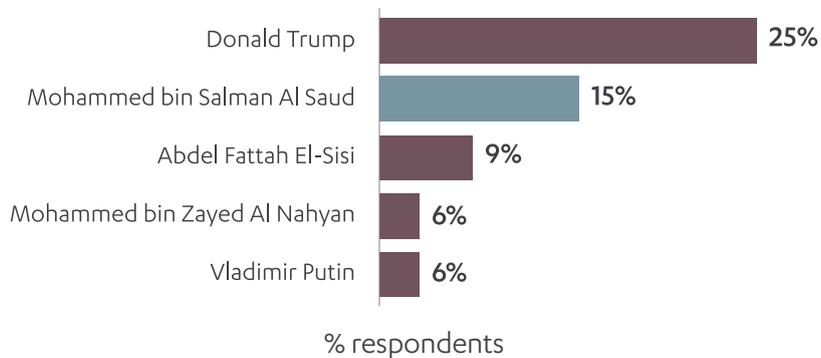
How confident are you that the Saudi Vision 2030 will succeed in securing the future of the Saudi economy?



Arab youth, particularly in the GCC, expect the Saudi Crown Prince to have a bigger impact on the region over the next decade than any other Arab leader

Now thinking about the next 10 years, which of the following individuals will have the biggest impact on the Arab world?

Top five across Arab world



Top three in GCC



Saudi Arabia's Crown Prince steps up to his young country's deep desire for reform



Bernard Haykel

Bernard Haykel is a scholar of the Arabian Peninsula, focusing on the politics, economics and history of Saudi Arabia, the other GCC countries, and Yemen. He is professor of Near Eastern Studies at Princeton University, where he is also director of the Institute for the Transregional Study of the Contemporary Middle East and the Program in Near Eastern Studies. Professor Haykel is the author of *Revival and Reform in Islam*, and most recently the co-editor of *Saudi Arabia in Transition*, both published by Cambridge University Press. He is considered an authority on Islamist political movements and Islamic law and is the author of numerous articles on the politics of Saudi Arabia and Yemen, Salafism, Al-Qaeda and ISIS.



MBS has given voice to the frustrations of the young generation with the status quo, and this explains, in part, why so many are supportive of his policies. But MBS has also been clear that diversifying the Saudi economy away from its heavy dependence on oil revenues will be a very difficult and painful process.

The 10th Arab Youth Survey finally provides reliable, quantitative data on the attitudes of both Arab and Saudi youth regarding the personality and policies of Saudi Arabia's Crown Prince, Mohammed bin Salman, known popularly as MBS. Until now, there were only anecdotal claims that Saudi youth—roughly the 70 per cent of the population under the age of 30—overwhelmingly approved of MBS and his economic and social reform policies.

Journalists, such as Thomas Friedman of the New York Times and others, reported on the enthusiastic and positive opinions that many young people in Saudi Arabia had of MBS. With this survey, we know that more than 90 per cent of Saudis between the ages of 18 and 24 approve of his appointment as Crown Prince and are supportive of his anti-corruption drive. An overwhelming majority also believe MBS is taking the Kingdom in the right direction, and feel that his economic reforms are likely to succeed, and that he is a strong leader who will have the biggest impact on the region than any other Arab leader over the next decade.

What is equally interesting is that a significant majority of youth across the Arab world—more than 60 per cent—share the same positive views of MBS, and in the case of the anti-corruption campaign, 86 per cent of Arab youth are supportive.

This data must come as very good news to MBS and the policy team around him, and he must certainly seek to capitalise on the goodwill and favour he enjoys.

However, to make sense of the numbers, one has to appreciate the context today of the Arab world, and of the Kingdom in particular. There is a deep and broad desire across these societies for reform, and the youth see MBS as the most engaged agent in its transformation.

In Saudi Arabia, this desire for change is particularly acute because the country has been led for at least two decades by a gerontocracy that only paid lip service to economic and social reform and kept the country in resolute stasis—change of any kind appeared impossible. In effect, the status quo consisted of a combination of extremely conservative social policies and government handouts in the form of public sector jobs, along with subsidies and various entitlements. Rent-seeking behavior was rewarded over entrepreneurship, private initiative and merit.

These extraordinarily high numbers in favour of MBS and his reforms are nonetheless fraught with danger. They signal very high expectations among the youth about the changes MBS can generate and the results he must deliver.



Diversifying the economy will take more than a decade to complete. There is no doubt that a generation of Saudis will face hardship and may never attain their aspirations. Therefore, it is important to find the means to reset their expectations and to explain that their hard work and sacrifice is necessary for future generations to have it better.



Nonetheless, success in effecting change is more likely with the widespread popular support of the youth – which this survey shows – than it would be if they were antagonistic and despondent.

Young Saudis no doubt believe that well-paying jobs will soon be plentiful as a result of the economic reform and diversification programme, otherwise known as Vision 2030. And, in fact, more than 90 per cent of those surveyed believe that “Vision 2030 will succeed in securing the future of the Saudi economy”. It bears keeping in mind that youth in Saudi Arabia are amongst the most Internet-connected and networked people on the planet, and are keenly aware of the affluent lifestyles that other youth enjoy in the West or in the Far East. Their expectations have to be managed carefully, because reform and job creation will take time.

In his speeches and interviews MBS has given voice to the frustrations of the young generation with the status quo, and this explains, in part, why so many are supportive of his policies. But MBS has also been clear that diversifying the Saudi economy away from its heavy dependence on oil revenues will be a very difficult and painful process.

It is a fact that no country in the world that has experienced the extremely rapid economic development that Saudi Arabia has witnessed has been able to successfully reform its economy. Because of this, it bears reminding people of the difficulty of this process, not least because it will help curb the belief that MBS can single-handedly work miracles. Expectations have to be managed because if they are unmet, they will eventually spill over into discontent.

Despite the huge support this survey shows, MBS is not necessarily in an enviable position. He has to make up for the decades of wasted opportunities during which real economic reform was endlessly deferred into the future by the government. Yet he must also manage expectations while reforming the economy with the aim of producing well-paying jobs and reducing the fiscal budget’s dependence on oil revenues.

Diversifying the economy is a generational challenge and will take more than a decade to complete. There is no doubt that a generation of Saudis will face hardship and may never attain their aspirations. Therefore, it is important to find the means to reset their expectations and to explain that their hard work and sacrifice is necessary for future generations to have it better. Nonetheless, success in effecting change is more likely with the widespread popular support of the youth – which this survey shows – than it would be if they were antagonistic and despondent.



**ARAB YOUTH OVERWHELMINGLY
WELCOME THE MOVE TO ALLOW WOMEN
TO DRIVE IN SAUDI ARABIA, BUT SAY MORE
MUST BE DONE TO ADDRESS WOMEN'S
RIGHTS THROUGHOUT THE REGION**

The Saudi government's decision to allow women to drive, which came in the form of a royal decree in September 2017, receives overwhelming support among Arab youth across gender and regional lines. Nine in ten (90 per cent) of young Arab women and 85 per cent of young Arab men support the decision, as do 89 per cent of young Arabs in the Levant, 88 per cent in the GCC, and 86 per cent in North Africa.

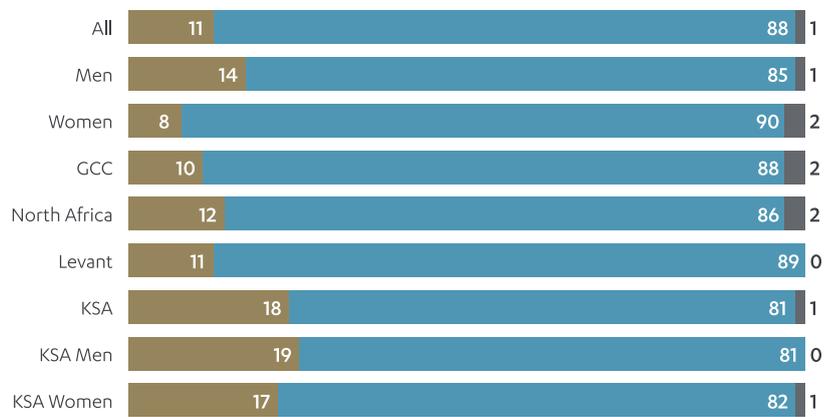
In Saudi Arabia, youth's support for the government's decision is clear, but slightly weaker than in the region overall, with 81 per cent supporting and 18 per cent opposing it. Perceptions of allowing women to drive is not driven by gender among young Saudis, with young Saudi men supporting the decision as strongly as young Saudi women (81 per cent vs. 82 per cent).

While it is clear that Arab youth view the Saudi decision as a step in the right direction, young Arabs also make it clear that more needs to be done by governments across the region to promote gender equality. Nearly 9 in 10 (85 per cent) young Arab women and 73 per cent of young Arab men agree that their leaders should do more to improve the personal freedoms and human rights of women. Merely 7 per cent of women and 13 per cent of men disagree that more needs to be done.

The call for the improvement of women's rights is loud and clear across the region, with 83 per cent of GCC youth, 79 per cent of young Arabs in the Levant, and 76 per cent in North Africa agreeing that more should be done. The agreement is particularly strong in Saudi Arabia, where 90 per cent of youth agree that their leaders should do more on women's rights.

The Saudi government's decision to allow women to drive receives overwhelming support among Arab youth across gender and geographic lines

To what extent do you support or oppose the Saudi government's decision to allow women to drive cars?



% all respondents

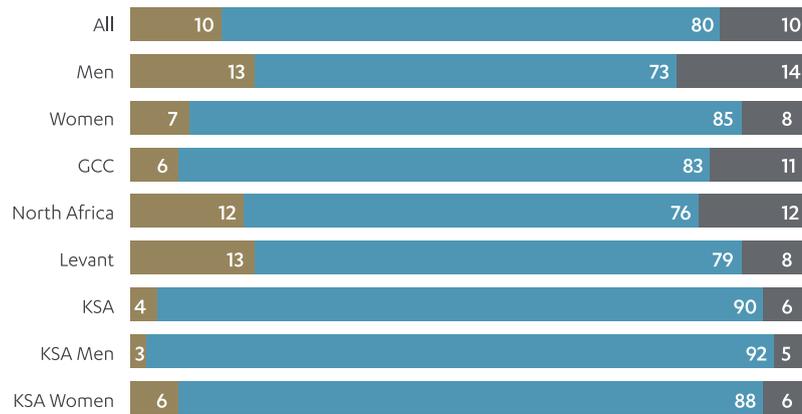
● Oppose ● Support ● Don't know



However, a strong majority of young Arabs, particularly in Saudi Arabia, say more needs to be done on women's rights

On a scale from zero to ten, how strongly do you agree or disagree with the statement?

“Arab leaders should do more to improve the personal freedoms and human rights of women”



% all respondents

● Disagree ● Agree ● Don't know





Arab youth support puts women in the driving seat



Mina Al-Oraibi

Mina Al-Oraibi is the Editor-in-Chief of The National, a daily English-language newspaper based in Abu Dhabi. An Iraqi-British journalist, Mina has more than 15 years of experience covering Middle Eastern, European and American current affairs. Prior to joining The National, she was a Senior Fellow at the Institute for State Effectiveness. At ISE, Mina worked on developing policy recommendations for improved governance in the Arab world, with a focus on Iraq and Syria. She was previously the Assistant Editor-in-Chief of Asharq Alawsat. In 2015, Mina was a Yale World Fellow and she is a trustee of the American University in Iraq – Sulaimani. Mina was named as a Young Global Leader by the World Economic Forum in 2009.



The ban on Saudi women driving has been the most evident challenge to women's rights in Saudi Arabia for those observing the kingdom from abroad. That is understandable as it is an issue that is visible and can easily be identified and associated with – so it has become a good barometer for the wider discussion on women's rights in the region. However, some in Saudi circles will say that the driving ban itself is over-emphasised as an obstacle, and that there needs to be greater advancements of rights related to work and travel which will require further steps.

No society can meet its aspirations for growth and advancement with half of its population hindered. That theory is generally accepted in the Arab world when it comes to the place of women in society and the workforce. However, putting that theory into practice remains a challenge. Legislation in areas of civic rights, as well as workforce participation and cultural barriers all require improvement in the Arab world, albeit at varying levels according to the countries, cities and towns involved.

The title of this year's Arab Youth Survey, 'A Decade of Hopes & Fears', is fitting for women of the region. There has been significant progress in certain countries allowing for hopes of continued improvements. However, for those countries suffering from conflict and war, it has been a decade of fears. In countries like Iraq and Syria, hard won rights are being threatened by militants. While Tunisia and the UAE topped advancement in women's rights last year, according to the WEF's Gender Gap Report, Yemen and Syria witnessed a regression as wars continue to rage there. In other countries with weakened economies, women's fears for their futures and those of their children are high.

And yet, there has been one particular country with marked changes: Saudi Arabia.

Last September witnessed a landmark moment with the decision in Riyadh to allow women to drive, as part of necessary reforms to ensure economic transformation – and the success of the new Crown Prince's signature Vision 2030.

Removing the decades-old ban comes as part of a wider series of social reforms that impact women, including allowing them to serve in the army and the return of physical education to girls' schools. All of these decisions allow for an expanded place for women in the public sphere.

It is no surprise that 88 per cent of those surveyed in the Arab Youth Survey support the Saudi government's decision to allow women to drive cars. However, it is also telling that 17 per cent of Saudi women participating in the survey opposed the move. The idea that over a sixth of young Saudi women would oppose the decision reflects an ultra-conservative minority that cannot be ignored. Meanwhile, close to a fifth of Saudi young men also oppose it. And yet there is wide-ranging buy-in for the move that has been discussed and postponed for years.

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One bright spot in the region has been the elevated position of female role models. From the late Zaha Hadid reigning over the architecture industry, to the role of Princess Reema bint Bandar of Saudi Arabia in championing women in work and sports, more successful and visible women play a vital enabling role.



And yet according to the Population Reference Bureau (PRB) in the US, the Arab world has the lowest number of women in the workforce – estimated to be just 22.5 per cent. Workforce participation and economic independence will continue to present a challenge to greater women’s rights in the region.

The need for greater efforts to improve women’s rights is a theme across the Arab world. The overwhelming majority of young Arabs surveyed say more needs to be done to advance ‘the personal freedoms and human rights of women’. The highest number of those demanding these changes was among young Saudi men, 92 per cent of whom said more needs to be done. So, while Saudi Arabia has lagged behind previously on women’s issues, it is their youth who are most vocal in calling for the advancement of women’s rights. It is a call that Saudi Crown Prince Mohammed bin Salman has heard and is clearly heeding in the reforms he has championed.

Surprisingly, only 76 per cent of young people from North Africa agreed with the Survey’s position on the need to do more to advance ‘the personal freedoms and human rights of women’. In Tunisia, women’s rights are the most advanced in the region, while Egypt, Libya, Algeria and Morocco remain more conservative. Close to a quarter of North Africa’s youth need to be encouraged to advance women’s rights, an issue usually tied in with greater civic rights and more stable societies.

The issue of education and literacy is closely tied to personal freedoms and the economic advancement of women. One of the more remarkable traits of the region is the interest of young women in STEM subjects. In the UAE, Oman and Saudi Arabia, more than 60 per cent of graduates in the sciences are women.

And yet according to the Population Reference Bureau (PRB) in the US, the Arab world has the lowest number of women in the workforce – estimated to be just 22.5 per cent. Workforce participation and economic independence will continue to present a challenge to greater women’s rights in the region.

Another crucial factor is tied to legislation. Until governments make decisions that secure the role of women in society and the public sphere, this will remain a challenge for the Arab world. The World Bank’s Survey on Women, Business and the Law in 2016 found at least 10 legal biases on women’s work in Arab economies.

While the region remains behind other parts of the world in advancing women’s rights, the #MeToo movement has shown the extent to which all countries and industries must work on enshrining protection for women – in both laws and societal practices.

One bright spot in the region has been the elevated position of female role models. From the late Zaha Hadid reigning over the architecture industry, to the role of Princess Reema bint Bandar of Saudi Arabia in championing women in work and sports, more successful and visible women play a vital enabling role. With more women rising in the public and private sectors of the Arab world, more girls can be supported in finding their rightful place in society. However, this is a mission that is equally the responsibility of men and women.

A large, stylized blue number 5 is centered on the page. The number has a thick, blocky appearance with a slight curve at the top of the vertical stroke and a rounded bottom. The background is a dark grey.

**YOUNG ARABS ARE CONVINCED
THAT DAESH – AND ITS IDEOLOGY –
WILL BE TOTALLY DEFEATED**

As efforts to counter Daesh and reclaim territory gained successful traction, and with the Arab world joining hands to initiate counter-terrorism initiatives, young Arabs are increasingly convinced that the terrorist organisation is weakening.

More than 3 out of 4 (78 per cent) young Arabs say Daesh has become weaker over the past year, compared to just 16 per cent who say the terrorist organisation has grown stronger. This marks a significant shift since 2017, when 61 per cent said Daesh was getting weaker versus 31 per cent who said the group was getting stronger.

The positive outlook on the decline of Daesh's influence complements the increasing confidence of Arab youth in the ability of their national governments to deal with the terrorist group.

This year, 68 per cent of Arab youth say they are confident in their government's ability to deal with Daesh, compared to 58 per cent in 2017.

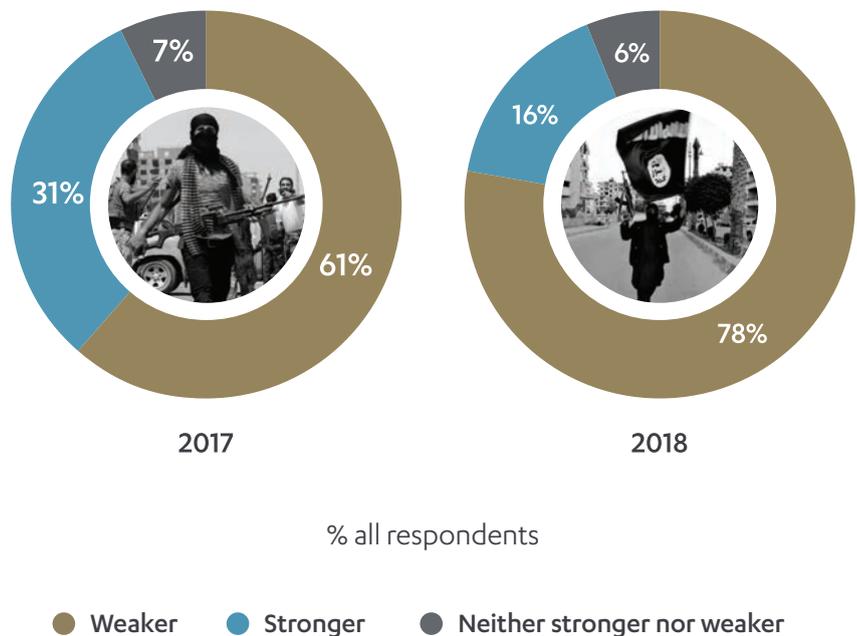
In fact, the confidence of young Arabs in the measures taken to tackle Daesh has been spiking over the past four years. In 2015, fewer than half (47 per cent) expressed confidence in their governments on dealing with Daesh.

Furthermore, increasing perceptions of Daesh losing the fight are translating into a majority of young Arabs believing that a full defeat is awaiting Daesh and, more importantly, its ideology. When asked about the future of Daesh, more than half (58 per cent) say Daesh and its ideology will be fully defeated. Such optimism is highest among GCC youth (66 per cent) followed by young people in North Africa (55 per cent) and in the Levant (50 per cent).

Nearly one in five (18 per cent) say Daesh will lose its territory but will remain a significant threat while another 15 per cent say Daesh will be replaced by a new terrorist organisation.

Arab youth increasingly say Daesh is getting weaker while expressing a growing sense of confidence in the government's ability to deal with the terrorist organisation

Thinking specifically about Daesh, over the past year, do you think Daesh has become...



How confident are you in your national government's ability to deal with the threat of Daesh?



A majority of young Arabs say Daesh and its ideology will be fully defeated

What do you think is the future of Daesh?



'Daesh and its ideology will be fully defeated'





History tells us the danger posed by Daesh has not yet passed



Hassan Hassan

Hassan Hassan is a senior fellow at the Tahrir Institute for Middle East Policy in Washington DC, a columnist for The National newspaper in Abu Dhabi and co-author of New York Times bestselling book *ISIS: Inside the Army of Terror*. He focuses on Syria, Iraq, the Gulf states and Islamist movements. He is a contributing writer for The Guardian, Foreign Policy, Foreign Affairs, the Financial Times and The New York Times.



While ideology was once cited as a driving factor behind Daesh's rise, the majority of young Arabs believe the group and its ideology will be fully defeated. This telling finding reflects how Daesh and its appeal are perceived in the region at this critical juncture of the group's existence.

When Daesh swept through large swathes of northwestern Iraq and eastern Syria in the summer of 2014, its ideology was quickly identified as a vital aspect of the effort to permanently defeat the group. The idea of a caliphate, in particular, was consistently cited as the major driving factor behind young Muslims traveling to join the organisation in Iraq and Syria at the time.

In a briefing in June 2016, Brett McGurk, the United States special presidential envoy to the global anti-Daesh coalition, made this observation: "The common denominator when I asked leaders in various capitals what is it that's driving your young people to this movement – the common denominator is this notion of a historic caliphate."

The proclaimed caliphate has now all but crumbled. Of all the territories Daesh once controlled, only small and scattered pockets remain under the group's control in eastern, central and southern Syria. The militants continue to have sanctuaries and operate in multiple countries, but they no longer control a viable "caliphate" anywhere in the region.

Against the backdrop of its territorial demise, then, the latest findings of the Arab Youth Survey provide timely insights into how young Arabs view the organisation and its future today.

While ideology was once cited as a driving factor behind Daesh's rise, the majority of young Arabs believe the group and its ideology will be fully defeated (58 per cent). This telling finding reflects how Daesh and its appeal are perceived in the region at this critical juncture of the group's existence.

Still, a quick examination of the circumstances relating to the appeal of Daesh over the past four years could offer cautionary tales for governments in the Middle East and beyond.

To start off, Daesh does not require a majority supporting it to continue to exist as a destructive force in the region. Before policymakers and observers woke up to the news that Daesh had taken over Mosul, Iraq's second-largest city, people from across the region had already turned against it. The group that called itself the Islamic State in Iraq and Syria had already been ridiculed as Daesh, a pejorative acronym that denoted barbarism and savagery. Countless clerics and individuals also used an ancient Islamic label for extremists, *khawarij*, meaning "outliers" or "rebels", to describe the group. Critically, the label implied the extremists could be fought and killed without hesitation.

And yet, the group was still able to control approximately one third of Iraq and half of Syria during the summer of 2014. The lesson was that there is more to such groups than just popular appeal or the lack thereof. They also feed on power vacuums, grievances and indifference.



Still, a quick examination of the circumstances relating to the appeal of Daesh over the past four years could offer cautionary tales for governments in the Middle East and beyond. To start off, Daesh does not require a majority supporting it to continue to exist as a destructive force in the region.



Similar patterns in 2008 and 2014, of false hopes, should not be allowed to happen today. Most young Arabs believe Daesh and its ideology could be fully defeated, but that merely provides an opening for governments in the region and internationally to engage these young people and address grievances that could enable Daesh and other extremists to make a comeback.

When Daesh made those military gains, it counted not just on the existence of a minority of supporters but also on the fact that the local majority did not feel they had a stake in the fight against it. In other words, for Daesh and like-minded groups, local indifference to them is no less important than active support for their cause. People at the time tended to see it as an extremist group, but most also refrained from resisting it when it rolled into their areas.

The world came to the fight against Daesh several months late in 2014, after the militants had already taken over large territories in Iraq and Syria. Before that, in 2008, American and Iraqi officials also proclaimed that Daesh failed to convince Iraqis of its ideology after the group was defeated, arguably more thoroughly than now. But the group came back, stronger than before. Indeed, a small number of respondents in the survey believe Daesh will regain its territory and establish its caliphate in the future (6 per cent), and a larger number believe the group will nonetheless remain a significant terrorist threat (18 per cent).

Daesh is already recovering in much of Iraq and Syria, not long after its territorial defeat. Instead of holding territories, Daesh reverted to old insurgency tactics to maintain its ability to fight and inflict damage.

These tactics, such as targeted killings and hit-and-run attacks, had a proven record of effectiveness in weakening local police and military forces and preventing residents from joining these institutions from 2008 to 2014. In one of its recent publications, Daesh even claimed that the rates of its attacks have come close to those that preceded its takeover of Mosul in 2014.

Daesh's continued attacks are especially effective if they are not met with military and political counter-measures to strengthen security institutions and encourage locals to feel they have a stake in maintaining them.

The optimism that many young Arabs project in the Survey's findings is betrayed by numerous indications that countries like the US and its allies in the region have little to no interest in rebuilding Iraq and Syria, for instance. It is thus hard to be upbeat about the lasting defeat of extremists when governments are not willing to do what it takes to help keep them defeated.

Similar patterns in 2008 and 2014, of false hopes, should not be allowed to happen today. Most young Arabs believe Daesh and its ideology could be fully defeated, but that merely provides an opening for governments in the region and internationally to engage these young people and address grievances that could enable Daesh and other extremists to make a comeback.



**YOUTH ACROSS THE MIDDLE EAST
INCREASINGLY VIEW THE US AS AN
ADVERSARY, WHILE RUSSIA CEMENTS ITS
POSITION AS THE TOP NON-ARAB ALLY**

Russia is now seen as the top non-Arab ally in the eyes of Arab youth, at the expense of the United States. For the second year in a row, Russia is in the top five and is seen as the top non-Arab ally, with 20 per cent of Arab youth saying Russia is a top ally, placing it far ahead of other non-Arab countries. For the first time in the history of the Arab Youth Survey, the United States has fallen out of the table of top five allies – the superpower now languishes in 11th place.

The UAE and Saudi Arabia remain the top two allies, according to young Arabs, with 37 per cent saying the UAE is their country's top ally and 35 per cent selecting Saudi Arabia.

Russia's influence is particularly evident in the Levant, where 31 per cent of young Arabs cite Moscow as a top ally.

In 2016, 63 per cent of Arab youth considered the US an ally of their country, against 32 per cent who viewed the country as an adversary. At the same time, 25 per cent said the United States was a top ally, behind only Saudi Arabia and the UAE. In 2017, in the immediate aftermath of Donald Trump's surprise victory and executive order banning six majority-Muslim country citizens from entering the US, young Arabs appeared to turn against the Western power, with 46 per cent viewing the US as an ally against 49 per cent who saw the country as an adversary. The situation has deteriorated for the US over the past year, and this year, a solid majority (57 per cent) of young Arabs say the US is an adversary. Even in the GCC, traditionally a stalwart US ally, a majority (55 per cent) now view the US as an adversary, while opposition to the US is strongest in the Levant (65 per cent).

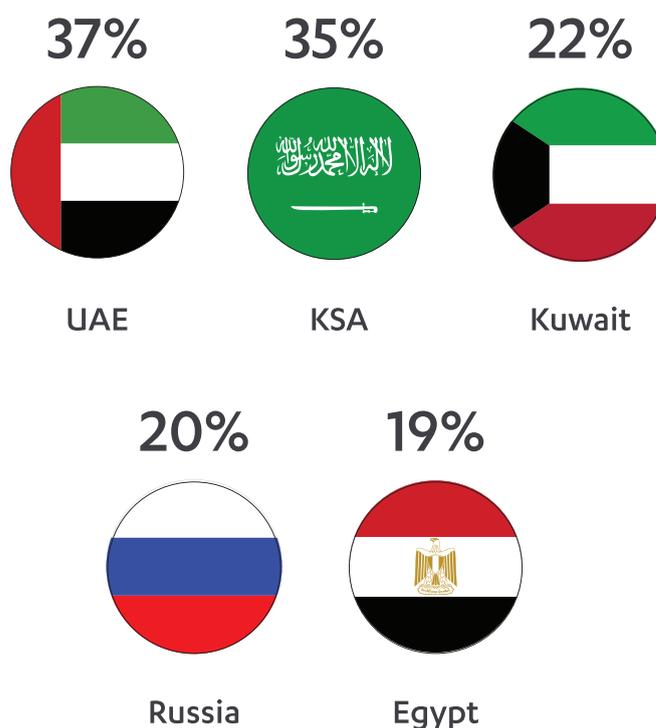
After a full year of Donald Trump's presidency, we asked young Arabs what impact his administration has had so far on the Arab world. Almost three quarters, 73 per cent, say Trump's election and presidency has had a negative impact and only 7 per cent think the impact has been positive. Trump's impact on the Arab world is viewed nearly as negatively as the rise of Daesh (4 per cent positive impact against 88 per cent negative) and the civil war in Syria (4 per cent positive impact against 83 per cent who say negative).

Views on the US among young Arabs appear to span two conflicting perspectives. On the one hand, in the geopolitical context, young Arabs increasingly view the US with suspicion at best and hostility at worst; on the other hand, from an aspirational point of view, the US comes second as the country young Arabs would most like to live in, and want their own to emulate. (See Finding 7 for more details.)

While the UAE and Saudi Arabia continue to be seen as the biggest allies by youth, the US falls to number 11, finding itself out of the top five for the first time and replaced by Russia as the top non-Arab ally

Now thinking about your country and its relations with other countries, who would you say is your country's biggest ally? (Showing top five)

Top five country allies - 2018

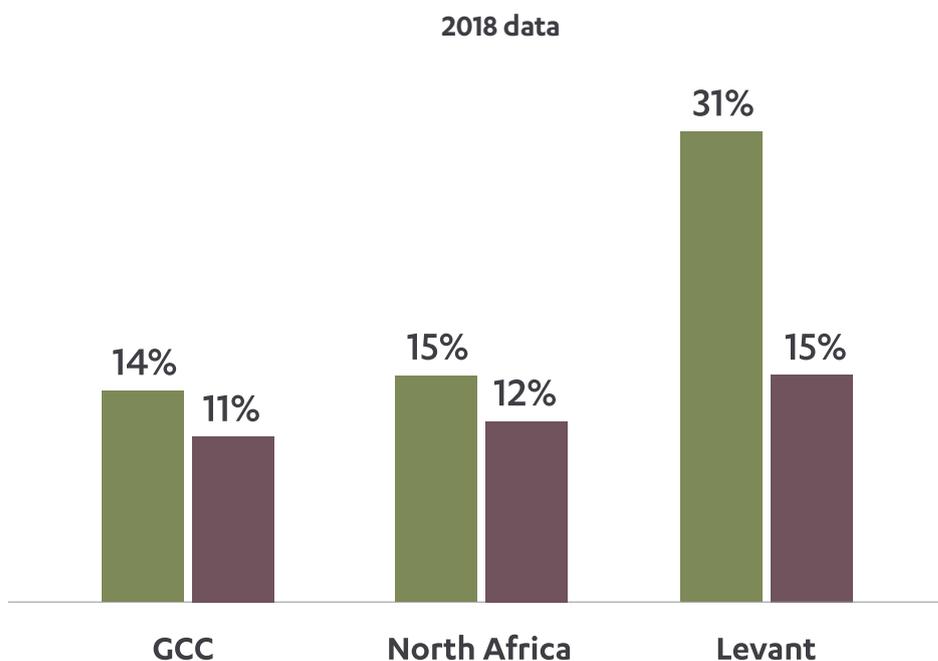
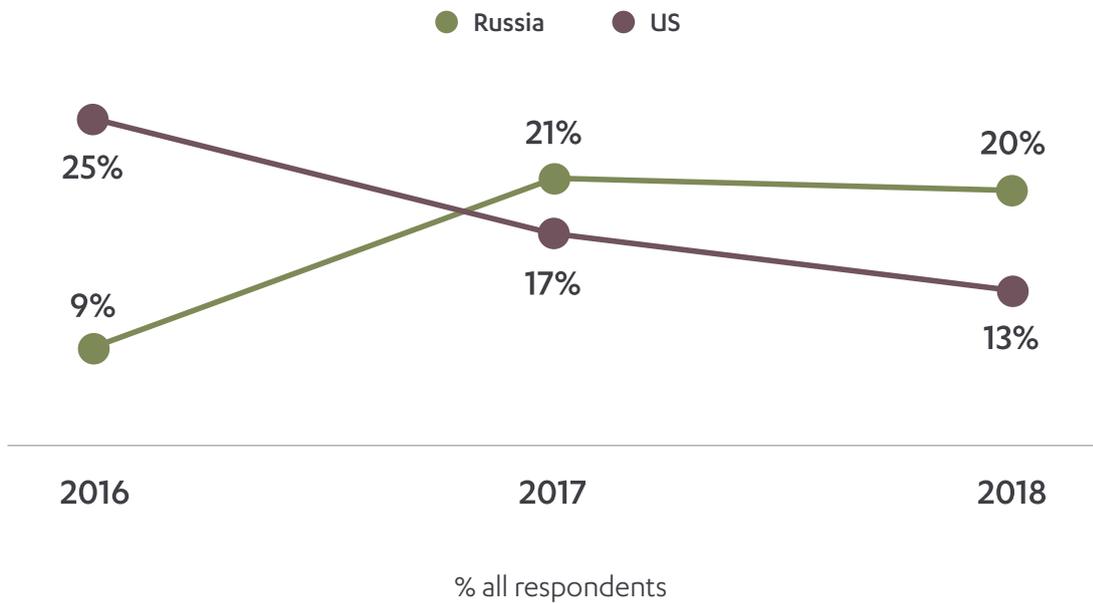


% all respondents

Top five country allies					
2012	2013	2014	2015	2016	2017
KSA	KSA	KSA	KSA	KSA	UAE
UAE	UAE	UAE	US	UAE	KSA
Qatar	Qatar	Qatar	UAE	US	Russia
Kuwait	Kuwait	Kuwait	Qatar	Egypt	Qatar
US	US	US	France	UK	US

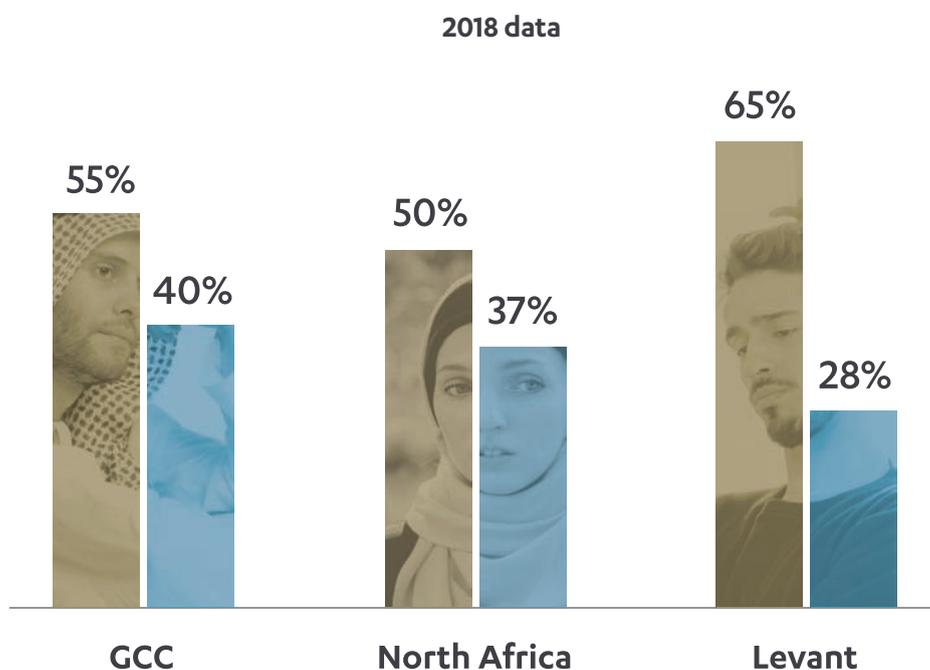
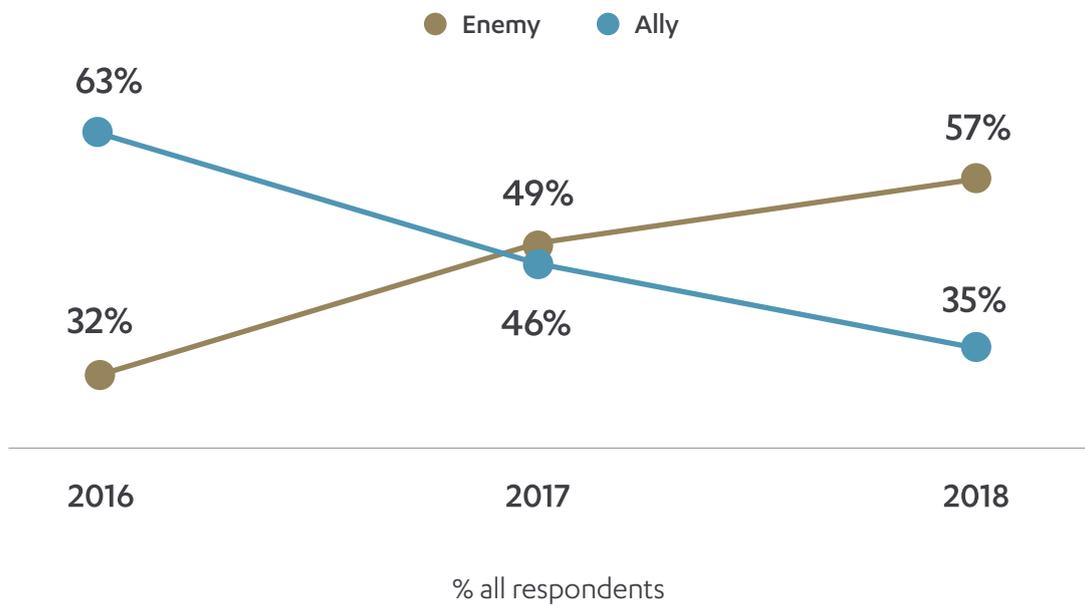
Russia has benefited from the downfall of America's image among young Arabs, solidifying its position as the top non-Arab ally

Now thinking about your country and its relations with other countries, who would you say is your country's biggest ally?



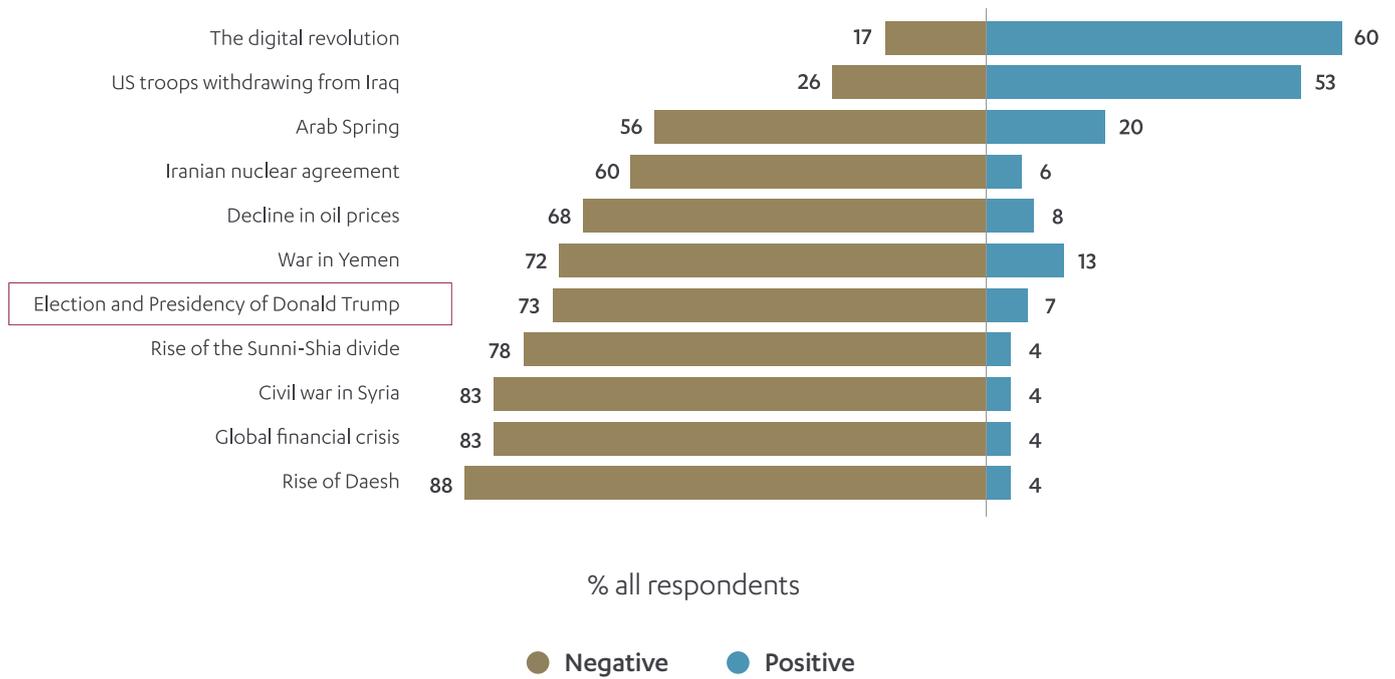
Over the past two years, there has been a dramatic shift in Arab youth's perceptions of the US, with a solid majority now saying America is an adversary of their country

Do you consider the United States a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of YOUR country?



Three-quarters of young Arabs view the impact of Trump's presidency on the region as negative

How positive or negative of an impact has this event or development had on the Arab world?





A role reversal for two global powers, but wait... the jury is still out



Hussein Ibish

Hussein Ibish is a senior resident scholar at the Arab Gulf States Institute in Washington. He is a weekly columnist for The National (UAE) and is also a regular contributor to many other U.S. and Middle Eastern 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 2004-09. From 1998-2004, 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.



Even though many young Arabs strongly disapprove of Al-Assad, Russia has created the impression of being a strong and decisive power, a steadfast ally, a force for stability and state sovereignty, and a winner. Nothing succeeds like success.

To the dismay of the United States, Russia is back as a major player in the Middle East – and many young Arabs are welcoming this development. The 2018 Arab Youth Survey shows the US dropping out of the top five of the biggest allies for the first time; plunging to number 11. Russia, placed fourth, is now the only non-Arab country among the five most favoured countries. There has been a precipitous decline in sentiment regarding the US, with clear majorities now identifying Washington as an “enemy” even as Russia’s profile continues to rise.

This dramatic change – a role reversal for the two global powers – has a complex and still-developing context. Russia, it must be remembered, played a major role in the Middle East until the 1973 Arab-Israeli War, when the US began to dominate regional diplomacy and cemented a new alliance with Egypt. Following the breakup of the Soviet Union, Russia virtually disappeared as a player in the Middle East.

However, as the US began to pull back from a regional leadership role during the Barack Obama presidency, Moscow stepped in, particularly through its 2015 military intervention along with Iran and Hezbollah, to save Bashar Al-Assad’s regime in Syria. With Al-Assad’s victory almost complete in most of the country, Russia is seen as having conducted the first successful international intervention in the Arab world since the liberation of Kuwait in 1991.

Even though many young Arabs strongly disapprove of Al-Assad, Russia has created the impression of being a strong and decisive power, a steadfast ally, a force for stability and state sovereignty, and a winner. Nothing succeeds like success.

But Russia benefits primarily from apparent contrasts with the US. For America’s friend and foe alike, the return of Moscow as a regional player offers a range of potentially useful options. Even some of the closest US Arab allies are developing closer ties to Russia as an alternative source of weapons. Saudi Arabia’s interest in the S-400 anti-aircraft missile system may be genuine. Or it could be intended to pressure Washington to deliver a long-discussed Terminal High Altitude Area Defence (THAAD) system that Riyadh wants more than ever because of Houthi missile attacks launched from Yemen at Saudi cities. Either way, Russia as an alternative supplier is useful both in itself and as leverage with Washington.

Russia benefits from its own absence from the Middle East scene in recent decades. Today, many narratives, be they patriotic, pan-Arab nationalist or, Islamist blame the US, both fairly and unfairly, for a huge percentage of regional woes. Russia has something of a clean slate, and is often viewed positively simply because it is not the US.



The present glow that Moscow basks in may quickly fade. As Russia re-emerges as a Middle East power in its own right, and not a sudden and welcome alternative to Washington, it will inevitably be increasingly held to account for its conduct, and especially its close alliance with Iran.



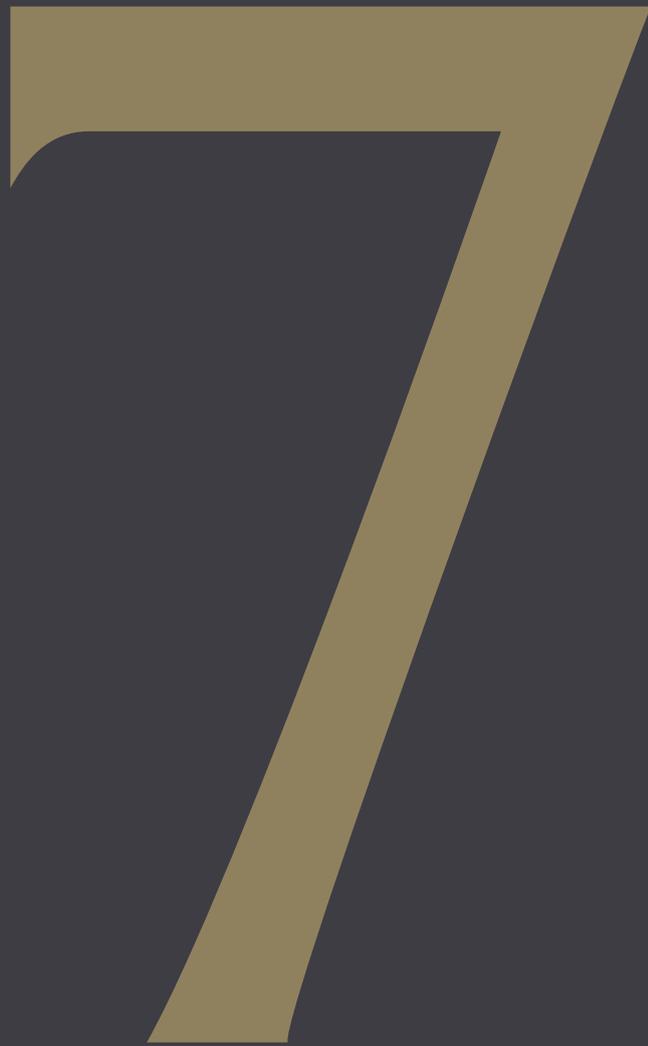
The perception that Russia is resolute and successful, and hence formidable, while the US is indecisive and inept, was greatly intensified following the limited US missile strikes against Syrian regime chemical weapons targets in April 2018.

This sympathy by contrast is one of the primary reasons, along with perceived success, that Russia has not been widely vilified for the carnage in Syria for which it is unquestionably responsible. In part because so much is expected of it, Washington is blamed for everything it does and doesn't do, not least the failure to secure a Palestinian-Israeli peace agreement after monopolising the process, and favouring Israel, for decades. Moscow, on the other hand, is currently being given a virtual pass for underwriting exceptional brutality in Syria, and all in the interests of Iran, no less.

The US is not only suffering from an extreme bout of Middle East conflict fatigue following the fiasco in Iraq, Washington also appears to have forgotten the possibility of achieving narrow and focused goals using limited means, which is precisely what Russia has accomplished in Syria since 2015 (and what the US accomplished in Kuwait in 1991). Obama famously predicted that Russia would end up "bleeding" and "overextended" by its intervention in Syria. The perception that Russia is resolute and successful, and hence formidable, while the US is indecisive and inept, was greatly intensified following the limited US missile strikes against Syrian regime chemical weapons targets in April 2018. Washington carefully avoided Russian, Iranian, Hezbollah, and even core regime assets, concentrating on a small group of chemical weapons-related targets without significant strategic value. This reinforced the notion that Russian deterrence works, and that Moscow has won a decisive victory in Syria which Washington is either unwilling or unable to challenge under any circumstances.

The startling shift in Arab youth public opinion in favour of Russia and against the US is also undoubtedly driven in part by personalities. Donald Trump is widely viewed, both within and outside of the US, as a ridiculous figure who also manages to be a racist and a bully, but who is not to be taken seriously. Vladimir Putin, by contrast, conveys an image of strength, determination, constancy, ruthlessness and gravitas – an image that even appears to greatly impress Trump himself. He appears to personify the successful, focused and determined Russia versus the maladroit, indecisive and hapless US. Trump has also managed to strongly intensify the unfair impression that Islamophobia is rampant in the US, while Putin and Russia have no such reputation. On the contrary, Russia has made common cause with anti-Islamist Arab forces such as Egypt and the UAE, in Libya and at conferences promoting "moderate" Islam and "combatting terrorism".

The present glow that Moscow basks in may quickly fade. As Russia re-emerges as a Middle East power in its own right, and not a sudden and welcome alternative to Washington, it will inevitably be increasingly held to account for its conduct, and especially its close alliance with Iran. The stunning success in Syria, which took place in a relative vacuum, has created an exaggerated sense of Russian military prowess and presence in the region. Russian propaganda, such as RT Arabic, is widespread and effective, but the fact is hundreds of Russian mercenaries were killed by a handful of US special forces in northern Syria. If Washington snaps out of its self-imposed retreat from Middle East leadership, Russia's appeal in the Arab world may not remain pre-eminent for long.

A large, bold, gold-colored number '7' is centered on a dark gray background. The number has a thick, uniform stroke and a slightly rounded top-left corner. It is positioned between two horizontal gold lines that extend across the width of the page.

**THE UAE REMAINS THE TOP
COUNTRY ARAB YOUTH WANT TO
LIVE IN, AND WANT THEIR OWN
COUNTRIES TO EMULATE**

The United Arab Emirates retains its position as the country most young Arabs would like to live in and would most like their own countries to take after for the seventh year running.

More than one in three (35 per cent) young Arabs say the country they would most like to live in is the United Arab Emirates, the same number as last year. This year, Canada joins the US as the second most popular nation that young Arabs would choose to live in, with both selected by 18 per cent of respondents. The two North American countries are followed by Saudi Arabia, picked by 16 per cent, and Germany, the choice for 12 per cent of young Arabs.

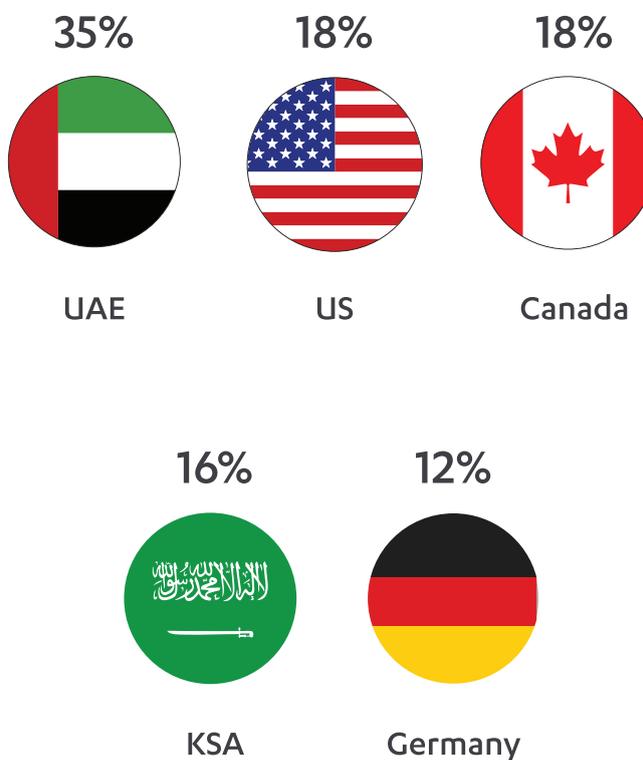
Asked which country they would like their own country to emulate, the UAE again is far ahead of other countries, with more than a third of young Arabs saying the UAE is a model country for their own. The US and Canada are again tied in second place at 17 per cent, followed by Japan – a new entry in the top five – with 15 per cent, and Germany with 13 per cent.

As in previous years, among Arab youth, the UAE is primarily associated with safety, security, strong career opportunities and well-paying jobs, largely explaining why the UAE is seen as a model country in a region facing security and economic concerns.

Young Arabs view the UAE as the top country to live in for the seventh year running, far surpassing other countries

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

Top five countries to live in - 2018



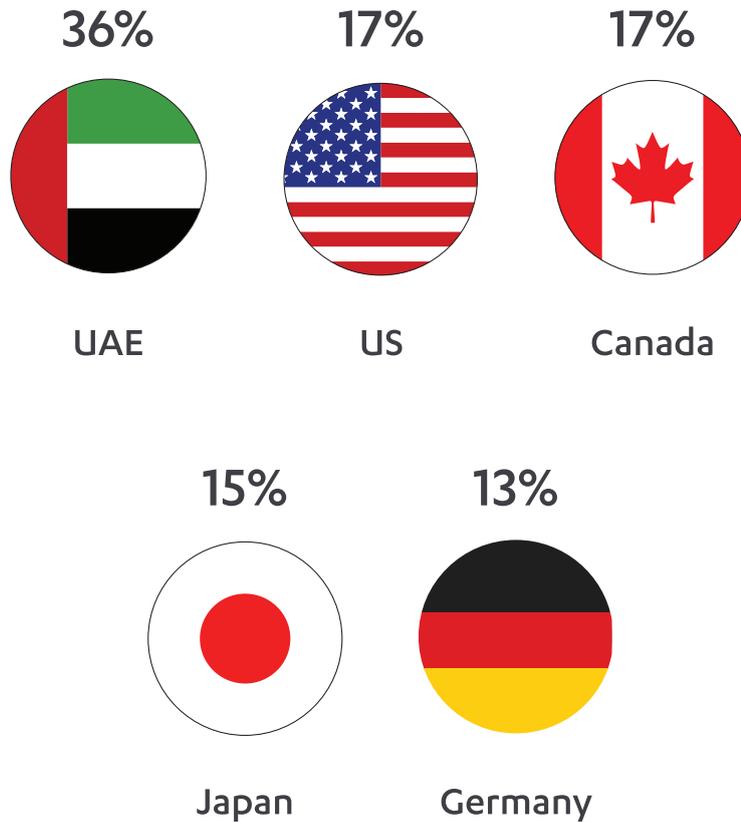
% all respondents

Top five countries to live in					
2012	2013	2014	2015	2016	2017
UAE	UAE	UAE	UAE	UAE	UAE
France	France	US	US	US	US
US	US	UK	Germany	Germany	KSA
Turkey	Turkey	KSA	Canada	KSA	Canada
KSA	KSA	Qatar	Qatar	Canada	Germany

The UAE also remains the country young Arabs are most likely to point to for their own country to emulate

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

Top five countries to emulate - 2018



% all respondents

Top five countries to emulate					
2012	2013	2014	2015	2016	2017
UAE	UAE	UAE	UAE	UAE	UAE
Turkey	France	US	US	US	US
KSA	US	Qatar	Germany	Germany	Canada
Qatar	Turkey	KSA	Canada	France	Germany
	China	UK	France	UK	KSA

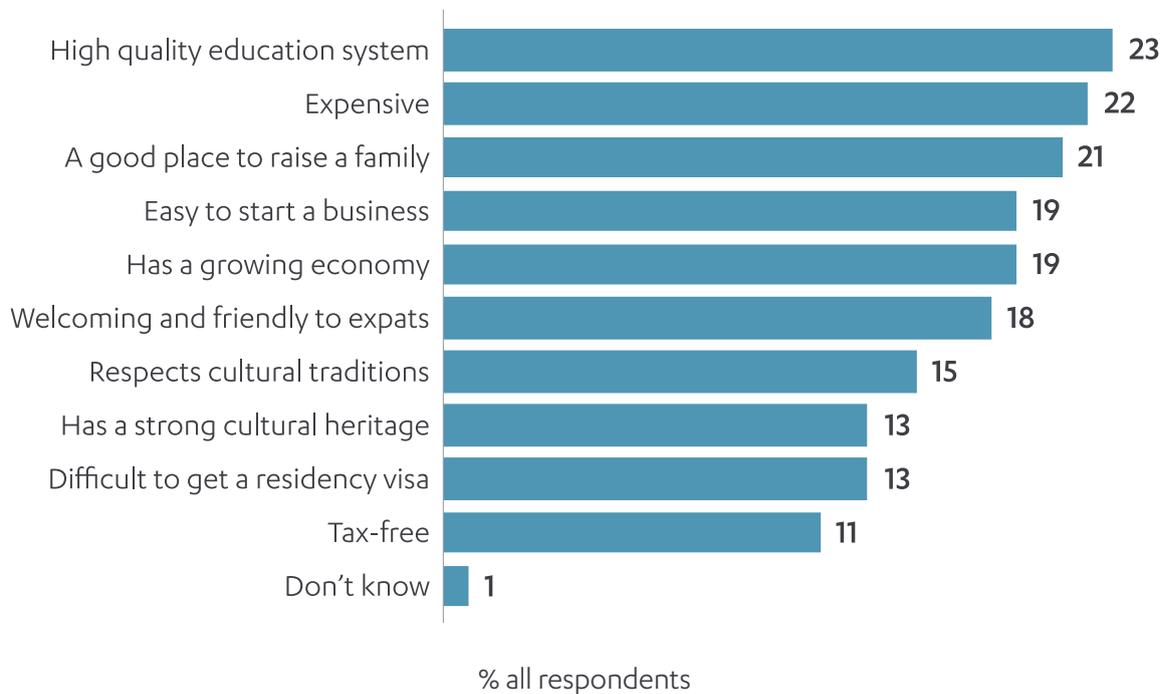
As in previous years, safety, security and career opportunities are most widely associated with the UAE

Now thinking specifically about the United Arab Emirates, which of the following phrases, if any, do you associate most with the UAE?

Top three associations with the UAE



Other associations with the UAE



UAE's focus on youth proves a bittersweet draw for young Arabs



Raed Barqawi

Raed Barqawi is the long serving editor-in-chief of Al Khaleej. The daily Arabic broadsheet was the first ever daily newspaper published in the UAE way back in the 70s. Under Barqawi, it has become one of the most popular Arabic newspapers in the country, and without doubt one of the most influential. It is closely read in government and business circles, with Barqawi himself widely viewed as one of the most connected and influential journalists in the Middle East.



We are all aware that, for decades, across much of the region Arab youth have been ignored and excluded from the equation. This indifference towards youth, with their massive potential and zest for life, provided fertile ground for extremist groups. Efforts across the region continue to be exerted to combat this phenomenon. Yet amidst this, the UAE has stood out as an exception, an example to be emulated all over the Arab world.

According to the Arab Youth Survey, the United Arab Emirates is the country in which most young Arabs would like to live, and the one they wish their own countries could emulate. This finding is neither new nor surprising, but it is a bittersweet statistic.

On the one hand, this means that the majority of Arab countries remain, unfortunately, incapable of providing for the needs of their young citizens. On the other, it reaffirms the fact that the UAE – an Arab nation – has become a role model and a beacon of hope for young Arabs. The UAE, ultimately, is doing something right when it comes to youth.

We are all aware that, for decades, across much of the region Arab youth have been ignored and excluded from the equation. This indifference towards youth, with their massive potential and zest for life, provided fertile ground for extremist groups. Efforts across the region continue to be exerted to combat this phenomenon. Yet amidst this, the UAE has stood out as an exception, an example to be emulated all over the Arab world.

A dedication to youth is not a recent development in the UAE; it stems from the vision that has been guiding the country since its very inception, set out by the UAE's Founding Father, the late Sheikh Zayed bin Sultan Al Nahyan.

He believed that people are our ultimate wealth, and that every other asset is void of value unless utilised to serve and develop the people.

The UAE leadership, therefore, has had youth at the heart of its efforts ever since the country was established, not only because marginalising the young means forfeiting their immense potential, but also because ignoring or alienating them would leave them exposed to exploitation by negative influences. We have seen a great many examples of this scenario unfold all around us.

To demonstrate but one concrete example of the UAE's successful approach, education is held in the highest regard in the UAE, and the country provides its youth – both citizens and residents – with a range of high quality academic opportunities at home and abroad.

In the workplace, too, youth are encouraged to play a major role: they are real partners in ideating, planning, and implementing projects. Youth lead the charge, as has been demonstrated by the appointment of so many young people to senior government posts, including Ministers for Youth Affairs and for Artificial Intelligence, where they bring energy, enthusiasm and new ways of thinking to government itself.



The refuge that the UAE has come to provide to these young Arabs has cemented its position as a land of opportunity, a country with a secure future and a country that champions human beings above all. It is my hope that, instead of importing young talent from the region, the UAE can in the future export its model of success, and that the Emirates' approach to youth becomes not the exception, but the norm for the Arab world.



What more could young Arabs ask for? Aren't they, after all, seeking a country that can help them realise their dreams and ambitions? A country whose leadership nurtures their efforts, invests in them, and considers them a solid foundation upon which the future can be built?

The UAE's trailblazing approach to the future is unimaginable without youth. It is they who, first and foremost, design this future with their aspirations. We could only imagine how much they will be able to achieve now that they themselves have been given responsibility for realising the dreams and ambitions of their peers, supported by a forward-thinking leadership that paves the way for their young citizens to gain the skills they need to secure fulfilling careers that contribute to society.

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There is an important truth that cannot be overlooked in this context: The UAE is arming its youth with everything they need to build a prosperous future. The Emirates does not limit its outlook to the sciences and technologies themselves; the country is more concerned with what these advancements can bring to its people.

Ultimately, the 'Emirati model' can be explained as: invest in youth; nurture their dreams; and catalyse their contribution to society. This simple model provides the answers that many across the Arab world are struggling to find. And it is this confusion that is leading to the bitter reality we are living today, which forces young Arabs into one of two directions: resigning themselves to an existence where hopes and ambitions will be crushed; or seeking a brighter future in a country not of their birth.

The refuge that the UAE has come to provide to these young Arabs has cemented its position as a land of opportunity, a country with a secure future and a country that champions human beings above all. It is my hope that, instead of importing young talent from the region, the UAE can in the future export its model of success, and that the Emirates' approach to youth becomes not the exception, but the norm for the Arab world.



**YOUTH IN THE LEVANT HAVE AN
INCREASINGLY BLEAK OUTLOOK
COMPARED WITH THEIR PEERS IN
NORTH AFRICA AND THE GULF STATES**

In 2013, the resounding theme of our survey was the Arab youth sentiment that 'Our best days are ahead of us'. The 10th Arab Youth Survey shows their positive outlook is now fractured in the Arab world – especially in the Levant. The Middle East is, indeed, a region divided, as the 9th Arab Youth Survey highlighted.

Reflecting the top finding of the survey last year that 'Optimism among young Arabs is waning, with a clear split by geography into 'haves' and 'have nots'', this year, young people in the Levant are significantly more pessimistic than their counterparts in the GCC and North Africa.

An overwhelming majority (86 per cent) of youth in the Levant say their country is headed in the wrong direction, while only 46 per cent of young Arabs in North Africa and merely 7 per cent in the GCC say the same about their countries.

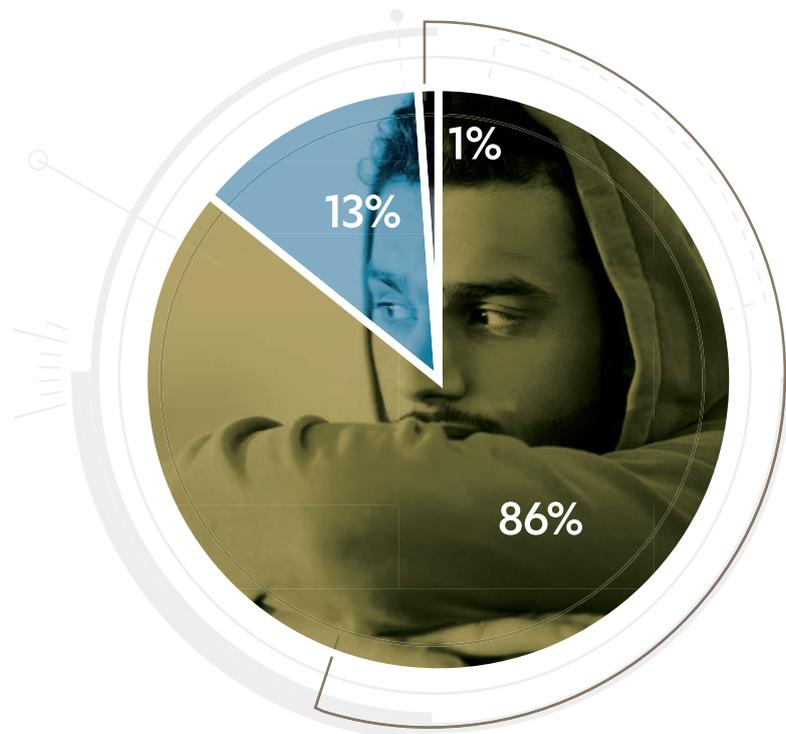
The contrast with the Gulf is striking. In the GCC, 82 per cent of young people believe their best days are ahead of them – a view shared by just 26 per cent of youth in the Levant.

The turbulence witnessed in the Levant region, especially following the rise of Daesh, has translated to widespread pessimism among its youth over the past five years. In 2014, while young Arabs in the Levant were divided about the direction of their country (39 per cent right direction versus 50 per cent wrong direction), they were largely optimistic about the long term, with 68 per cent saying their best days were ahead of them. Today, only 13 per cent think their country is headed in the right direction and three quarters (72 per cent) say their best days are behind them.

The Levant sample included youth in war-torn Yemen and is likely to have contributed to the negative outlook. Additionally the Survey could not reach youth in Syria due to the ongoing conflict. It is reasonable to expect that the finding could have been bleaker if the Syrian youth sample was included.

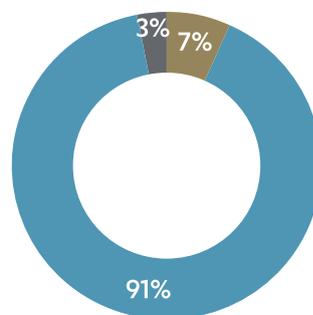
Young people in the Levant are significantly more pessimistic than young Arabs in the GCC and North Africa

Thinking about the past five years, in general, do you think things in your country of residence are going in the right direction or are they going in the wrong direction?

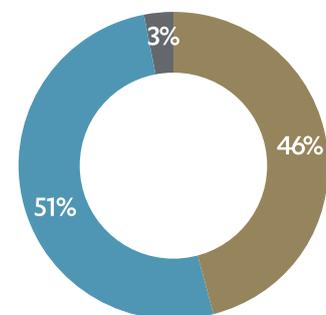


Levant

● Right direction ● Wrong direction ● Don't know



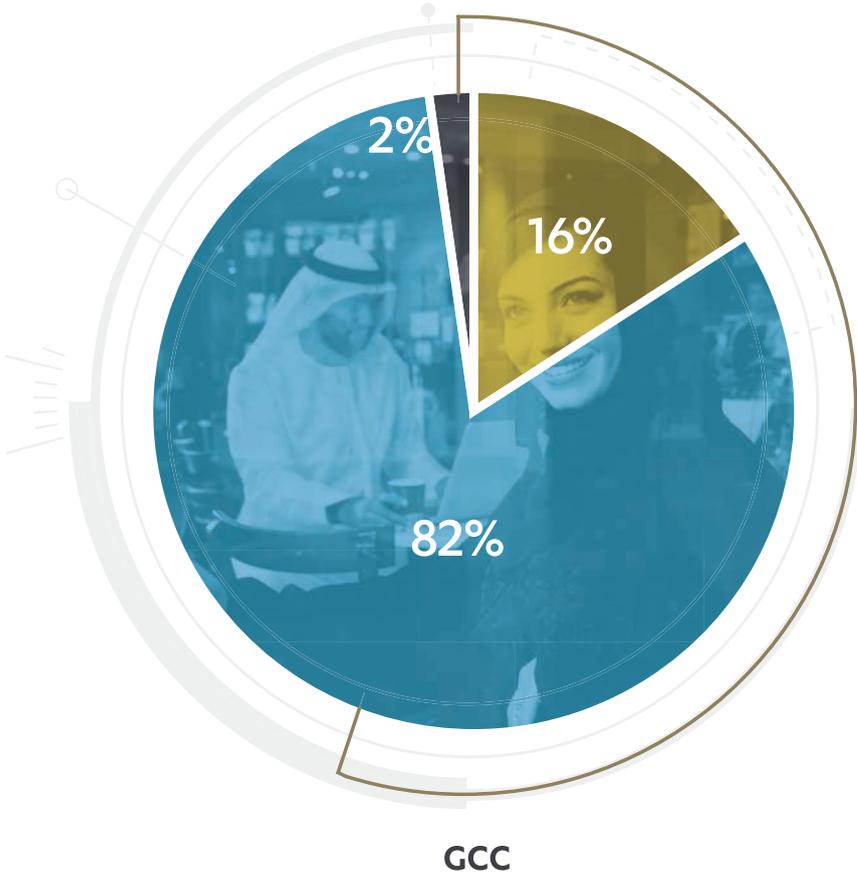
GCC



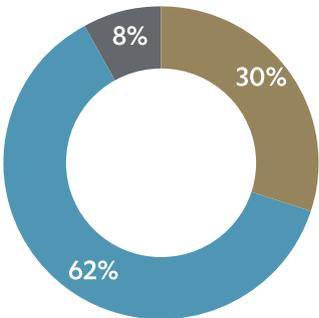
North Africa

Young people in the GCC are markedly more optimistic than their counterparts in the Levant and North Africa

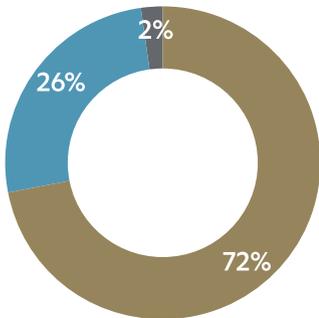
Which of the following do you agree with?
“Our best days are...”



● Ahead of us ● Behind us ● Don't know



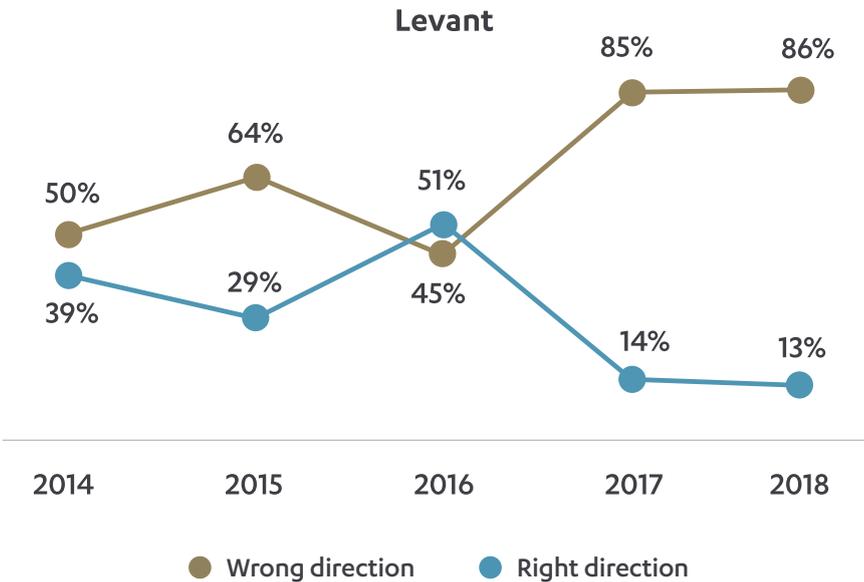
North Africa



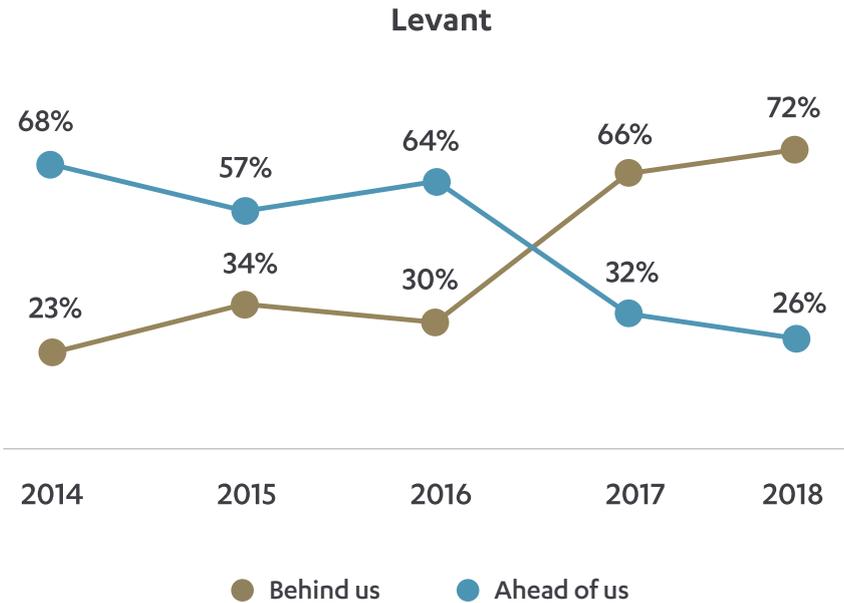
Levant

Youth's outlook in the Levant has turned increasingly bleak, particularly over the past two years

Thinking about the past five years, in general, do you think things in your country of residence are going in the right direction or are they going in the wrong direction?



Which of the following do you agree with?
“Our best days are...”



A blighted region leaves little hope for Levant's youth



Osama Al-Sharif

Osama Al-Sharif is a veteran journalist and political commentator from Amman, Jordan. Educated in the US and Britain he 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.



The US invasion of Iraq in 2003, with its regional reverberations, was a watershed event for tens of millions of people living in these five states and territories.

No region in the Arab world has been as severely tested over the past two decades as the Levant. Comprising Iraq, Syria, Lebanon, Jordan and the Palestinian territories, the Levant's people have endured foreign invasions, sectarian strife and uprisings. In the process, the world could do little but watch the Levant lose much of its unique cultural, religious and ethnic diversity, rich archaeological history and exceptional human potential, not to mention billions of dollars in missed economic growth.

The US invasion of Iraq in 2003, with its regional reverberations, was a watershed event for tens of millions of people living in these five states and territories. That geopolitical disaster has been blamed for a series of regional upsets that include foreign meddling in local affairs, the flare-up of sectarian fighting, the waning of central governments, the massive usurpation of national wealth, the emergence of extremist groups and foreign jihadists, the displacement of millions and the horrors of catastrophic civil wars.

Some countries were directly consumed by turmoil, such as Iraq and Syria. Others, namely Lebanon and Jordan, were challenged politically, economically and socially by the aftershocks of what was happening near their borders. The Palestinians continued to suffer under Israeli occupation as hopes for a political settlement based on the two-state solution crumbled.

It is no surprise then that the 2018 ASDA'A Burson-Marsteller Arab Youth Survey has found that youth's outlook in the Levant is increasingly bleak, particularly over the past two years. Compared to their peers in the GCC and North Africa regions, young Arabs in the Levant are by far the most pessimistic. Eighty-six per cent believe that their country of residence is going in the wrong direction, compared to 46 per cent in North Africa and just 7 per cent in the GCC.

Aside from the political disarray engulfing countries like Iraq and Syria, all the Levant countries are suffering from economic stagnation. In Jordan, where more than 70 per cent of the population is under 30 years of age, successive governments have failed to address the challenges of growing unemployment, which now stands at 18 per cent. The rate is higher among young men, and is almost 30 per cent among young women.

The Palestinian territories are not doing any better. In the besieged Gaza Strip, where 2 million Palestinians continue to endure a 10-year economic blockade, 80 per cent of the population relies on food handouts to survive and more than 60 per cent of those aged between 15 and 29 in Gaza are out of work; more than twice as high as the rate in the West Bank.



This year, though, could provide some much-needed relief. Elections are to be held in Iraq and Lebanon, and they just might put both countries on the path to slow recovery. Syria remains a global challenge, but the guns have at least stopped firing across much of the country. Jordan is attempting, once again, to restructure its economy. The Palestinians will have to wait until the international community can summon the will to end their decades-old suffering. By the end of the day the future of this region rests on its youth. This is why the current trend must be reversed.



Despair among the youth speaks volumes about the future of such an important, but volatile, region of the Arab world. It explains how the so-called Arab Spring was triggered by disenfranchised youth in its early days before it was corrupted and hijacked by ideologically motivated opportunists. Arab youth in most Levant countries wanted social and economic justice and an equitable political system. They wanted a future where their right to find jobs, enjoy social and economic stability and progress could be a reality.

On paper, Lebanese youth appear to be doing better, with the unemployment rate standing at about 7 per cent and where those aged between 15 and 24 make up about 16 per cent of the population. But most young Lebanese dream of finding a job in the GCC, especially the UAE. And with more than 1 million Syrian refugees now in Lebanon, the economy remains under tremendous pressure.

Iraqi youth – those aged between 15 and 24 years old – make up about 19 per cent of the population of 32 million. The unemployment rate now stands at about 14 per cent, but with a dysfunctional political system, rampant corruption and more than 3 million internally displaced people and 8.7 million people in need of humanitarian assistance, the reality is much worse for young Iraqis than the statistics suggest.

That leaves Syria, a country left in ruins by more than seven years of bloody civil war that is still raging in places, and with military interventions by no less than four foreign powers and dozens of armed militias. The UN estimates that 13.5 million Syrians depend on humanitarian assistance, of which more than 6 million are internally displaced and around 5 million are refugees outside Syria. One can only speculate on the social and economic effects the civil war will have on generations of Syrians.

With this bleak reality in mind it is not difficult to understand why a majority of young Arabs in the Levant, 72 per cent, believe that their best days are behind them. This is a dangerous finding that warrants attention from national governments and the international community alike.

Despair among the youth speaks volumes about the future of such an important, but volatile, region of the Arab world. It explains how the so-called Arab Spring was triggered by disenfranchised youth in its early days before it was corrupted and hijacked by ideologically motivated opportunists. Arab youth in most Levant countries wanted social and economic justice and an equitable political system. They wanted a future where their right to find jobs, enjoy social and economic stability and progress could be a reality.

This year, though, could provide some much-needed relief. Elections are to be held in Iraq and Lebanon, and they just might put both countries on the path to slow recovery. Syria remains a global challenge, but the guns have at least stopped firing across much of the country. Jordan is attempting, once again, to restructure its economy. The Palestinians will have to wait until the international community can summon the will to end their decades-old suffering. By the end of the day the future of this region rests on its youth. This is why the current trend must be reversed.



WHILE YOUNG ARABS INCREASINGLY TURN TO SOCIAL MEDIA FOR THEIR NEWS, THEY SEE CNN AS THE MOST TRUSTED AND AL JAZEERA AS THE LEAST TRUSTED NEWS SOURCES

Underpinned by high smartphone penetration rates as well as the digital-savvy outlook of Arab youth, social media continues to gain popularity – not just as a tool for social engagement, but also as the primary source of news among young Arabs.

For the first time, more young Arabs say they get their news on social media (63 per cent) rather than via television (51 per cent). This marks a major shift since 2015 when only 25 per cent cited social media as a source for news, compared to 60 per cent saying they were getting their news on TV.

The growth of social media as a news source is largely driven by Facebook. Nearly half of young Arabs (49 per cent) say they get their news on Facebook daily, a significant increase just a year ago when only 35 per cent said they were getting news on Facebook daily. A significant 61 per cent of Arab youth say they use Facebook more frequently than a year ago, compared to just 5 per cent who say their Facebook usage has declined over the past year.

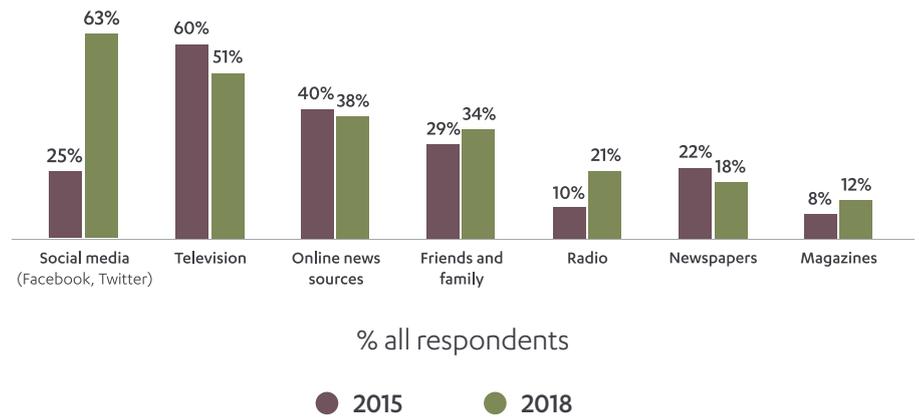
While fake news has become a top-of-mind topic around the world, young Arabs express a high level of trust in the region's leading news sources. Arab youth view CNN as the most trustworthy news source, with 75 per cent saying they trust the international news channel, compared to 19 per cent who say it is untrustworthy. CNN is followed by BBC (72 per cent trustworthy), MBC and Facebook (both 71 per cent), Google (70 per cent), Al Arabiya (64 per cent) and Sky News Arabia (61 per cent).

Al Jazeera is seen as the least trusted news source among Arab youth with only 53 per cent considering Al Jazeera trustworthy while 43 per cent say it is untrustworthy.

Newspapers continue to face the challenge of engaging young Arabs as their popularity declined – from 22 to 18 per cent – while magazines made gains with 12 per cent of Arab youth citing them as their news source in 2018 compared to 8 per cent in 2015. Family and friends are key news sources for young Arabs with more than one-in-three (34 per cent) getting their news from this informal source, 5 per cent more than in 2015.

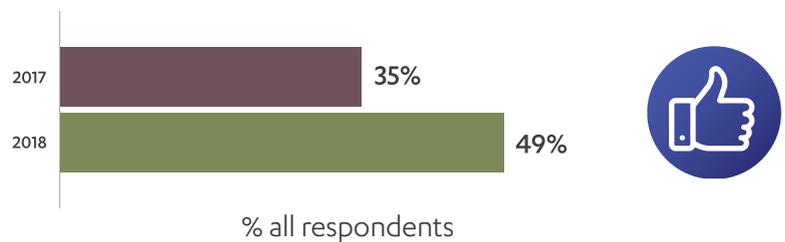
For the first time more young Arabs say they get their news on social media than TV, marking a major shift since 2015

Where do you get your news?

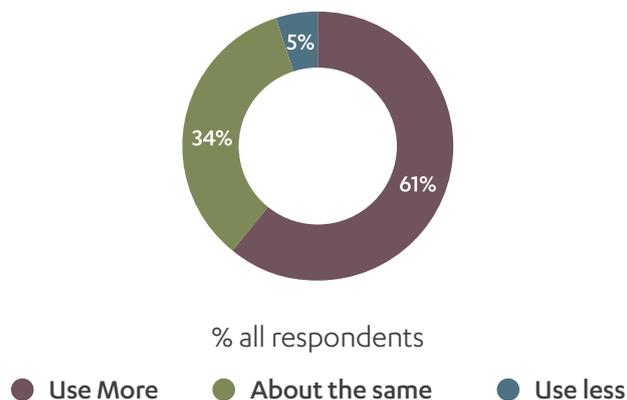


Facebook's influence among Arab youth continues to grow, with half now saying they get their news on Facebook daily

How often do you get your news on Facebook? (Showing daily)

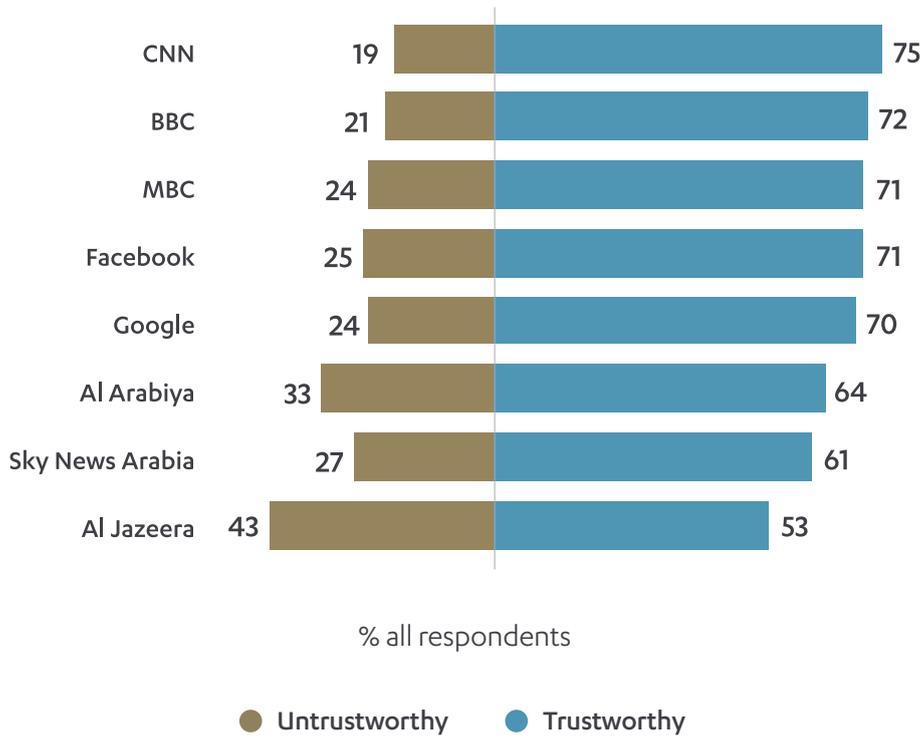


Compared with a year ago, would you say you use Facebook more, less, or about the same?



Young Arabs view CNN as the most trusted and Al Jazeera as the least trusted news sources

How trustworthy do you think is each of the following sources of news?



The figures above do not add up to 100% as they omit those who were not familiar with or expressed no opinion of the individual news sources.



Democratisation of information has transformed our media landscape – for better and for worse



Khalid Al Maeena

Khalid Al Maeena is a political and media analyst and Managing Partner of Quartz Communication Company. He has held a broad range of positions in Saudi media for almost 30 years, including CEO of a PR Firm, Saudi Television news anchor, talkshow host, radio announcer and journalist. As Editor-in-Chief of Arab News, the largest English-language newspaper in the Middle East, Al Maeena steered the paper through the Gulf Crisis and it was the only Saudi newspaper to have a reporter in Tahrir square during the Arab Spring. He is a visiting non-resident scholar at the University of Central Florida.



The media has changed irreversibly because of the democratisation of information, whether the information is true or not. Anybody with a connection can put words and pictures on the Internet. The problem is, it has become increasingly difficult to find out what the truth is.

Alfred Harmsworth, 1st Viscount Northcliffe, acknowledged by Lord Beaverbrook as “the greatest figure who ever strode down Fleet Street” famously observed that, “News is what somebody somewhere wants to suppress; all the rest is advertising.”

The problem was though, how do we distinguish between what is advertising (or propaganda) and what is news; and does it even matter? Those questions remain relevant. The difference is that in the past, few asked that question and the number of news sources was very few compared with what is available over the Internet today.

Our diversity of ‘news’ sources now ranges from the opinions of a keyboard warrior closeted in a dark bedroom in rural Arkansas to the most eminent and publicly lauded investigative journalist – and the democracy of the Internet has allowed the opinions of both to be expressed equally.

As a boy, I developed an addiction to news. It was an innocent addiction in far less complicated times. I used to devour news and would wait patiently to have a glimpse of the paper before my grandfather delved into it with his morning tea. News and media became embedded in my DNA from the age of seven. That early addiction was always dormant, reinforced by the newspapers, radio and later television that became a part of our household. When I was asked to head Arab News in Jeddah in 1982, although I had never worked for a publication I took up the challenge. For ten years it was print, print and print.

Reflecting on the media from a variety of perspectives, I am amazed at the speed of change over the last few years.

The Iraqi invasion of Kuwait and subsequent rise of CNN and later MBC added a new dimension to news gathering and viewing. For the first time the public saw wars and brutality live on air. This did not greatly affect the print media, though, as it was still considered a part of the larger communication medium; each complemented the other.

The rise of digital technology, however, saw momentous changes. Telex and fax machines were discarded as fibre optic technology crept in. There was a new lexicon. Facebook, Twitter, Instagram and a host of other platforms became part of our lives. Citizen journalism was born and it stumbled blindly into a brave new world.

No longer were censors capable of handling this. “If you can’t print, tweet!” became the motto. Many Arab writers would tweet and publish their stories on Facebook with a note saying that the editor had spiked the piece. Notoriety or censorship is a powerful advertisement; consequently, they got more readers.

As a result, the media has changed irreversibly because of the democratisation of information, whether the information was true or not. Anybody with a connection can put words and pictures on the Internet. The problem is, it has become increasingly difficult to find out what the truth is.

The 10th ASDA Burson-Marsteller Arab Youth Survey shows that young Arabs trusted CNN most as a news source and Al Jazeera least. It also shows that there had been a substantial shift towards social media as a source for news. Moreover, young Arabs interviewed say they get more of their news from social media than television. This was a substantial shift from the 2015 position.



The digital bubble has now burst and its overflow has affected us all. However, the majority of young people in the Arab world are mature and would like to use these new tools to improve society. They also strive to use them as a vehicle for the promotion of goodwill and progress. The young, as always want their voices to be heard. Never before have they had such a ready worldwide platform on which to express themselves. Young people, through these new forms of media, have exhibited more maturity than many of those before them who led traditional media.



Tweeting has become if not ‘the sport of kings’ then certainly that of heads of state. They have used Twitter to expound their views and at times present the news first hand, bypassing their own official media channels. The downside to all of this is the total lack of reliability and accountability. Traditional news sources are bound by codes of practice – admittedly sometimes broken. However, you cannot fire a Twitter ‘journalist’ for inaccuracy.

Augmenting this shift, 49 per cent of young Arabs say they get daily news from Facebook. Given the recent exposures concerning Facebook and Cambridge Analytica – news of which broke after the fieldwork for the Survey was completed – one has to question the veracity of any news sourced from that platform and ask what is Facebook’s real purpose in life? The dissemination of news it is not. Perhaps social control?

Tweeting has become if not ‘the sport of kings’ then certainly that of heads of state. They have used Twitter to expound their views and at times present the news firsthand, bypassing their own official media channels. Trump of the US, Erdogan of Turkey and many Arab rulers, too, use Twitter for speedy dissemination of their views. The downside to all of this is the total lack of reliability and accountability. Traditional news sources are bound by codes of practice – admittedly sometimes broken. However, you cannot fire a Twitter ‘journalist’ for inaccuracy.

This opening of access to Internet-wide exposure gave rise to the new media bogeyman, Fake News. If a statement, a Photoshopped image, or an outrageous tweet could cause a sensation, then many young people jumped on board. They got followers but the damage they were doing was virtually irreparable.

In a few short years, we went from newspaper journalism, subject to fact checking and heavy editing, to blogs, stuffed with opinions, to tweeting, where you can say anything and it gets serially repeated. The oft-quoted Joseph Goebbels line is as true today as it was in the 1930s: “If you tell a lie big enough and often enough, it will eventually become the truth.” Then it might have taken months or years; now with the speed of the Internet, it takes minutes.

And so, Arab Twitter users, young and old, spread division, hatred and malice among the Arab people, even if they did not explicitly mean to. Many of the young thrived on spreading fake news. Instagram began to be used extensively and, with the removal of several taboos, young women and men created a reality show of themselves. Their followers increased by the thousands.

This ego trip had some positive aspects: it helped spread Arab fashion, food, adventure and sports. But a new breed of “media Influencers” in the Gulf began to acquire a revenue stream that made them financially independent; this hurt mainstream media and I observed this shift in both circulation, subscription and advertising.

The digital bubble has now burst and its overflow has affected us all. However, the majority of young people in the Arab world are mature and would like to use these new tools to improve society. They also strive to use them as a vehicle for the promotion of goodwill and progress.

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10

**INSPIRED BY THE DIGITAL REVOLUTION,
FUTURE ARAB ENTREPRENEURS TURN
TO THE TECH SECTOR, WHICH OFFERS
PLENTIFUL OPPORTUNITIES IN THE REGION**

The transformation of the digital landscape has had a significant effect on the lives of young Arabs, with youth saying the digital revolution was an important event positively shaping the region over the past decade. Across the region, one in ten young people cite the digital revolution as the most important development in the region over the past decade, placing it as the third most significant event overall, behind the rise of Daesh (22 per cent) and the Arab Spring (19 per cent).

A strong majority (60 per cent) say that the digital revolution has had a positive impact on the region, compared to only 17 per cent who say the impact has been negative.

Technology (18 per cent) has emerged as the top sector among those in which young Arabs would consider starting a business, surpassing retail (15 per cent) and real estate (14 per cent) which ranked top in previous years, particularly among those who view the digital revolution as the most important development of the past decade (28 per cent choose technology).

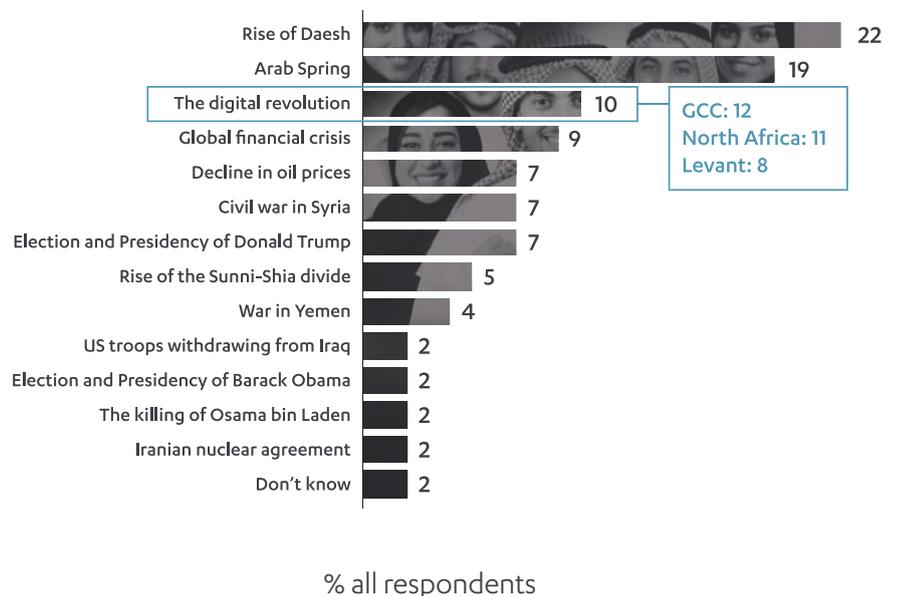
Tech entrepreneurs have plenty of opportunities to target businesses at their peers, especially in the growing online retail space. When questioned about their online shopping habits, more than half (53 per cent) of respondents say they shop online, with 26 per cent shopping online monthly, while 47 per cent have never shopped online. Young Arabs cite faster shipping (29 per cent), more secure payments (25 per cent), more user-friendly mobile shopping sites (25 per cent), and a wider availability of products and services (24 per cent) as the top factors that could make them shop online more frequently.

Similarly, 52 per cent of young Arabs say they use online banking services – 29 per cent on a monthly basis – while nearly half (48 per cent) say they have never used online banking. When asked what would make them use online banking more frequently, young Arabs are most likely to cite more user-friendly services (29 per cent), greater availability of online banking services (28 per cent) and availability of online customer service (27 per cent).

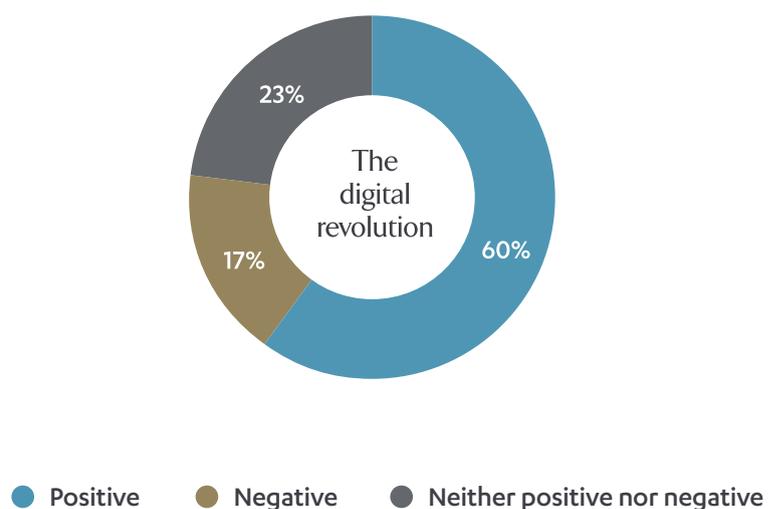
More needs to be done to develop the digital ecosystem to ensure young people are able to convert this into a career or business opportunity. Google said in April 2018 that 200 million people in the Middle East and North Africa – almost half the population – are still not connected to the Internet, while a recent study by the World Economic Forum states that one in five jobs in the Arab world will require digital skills that aren't widely available in the region today.

Young Arabs view the digital revolution as an important development that has shaped the region over the past decade

Which of the following events or developments that took place in the past 10 years in your view has had the biggest impact on the Arab world?

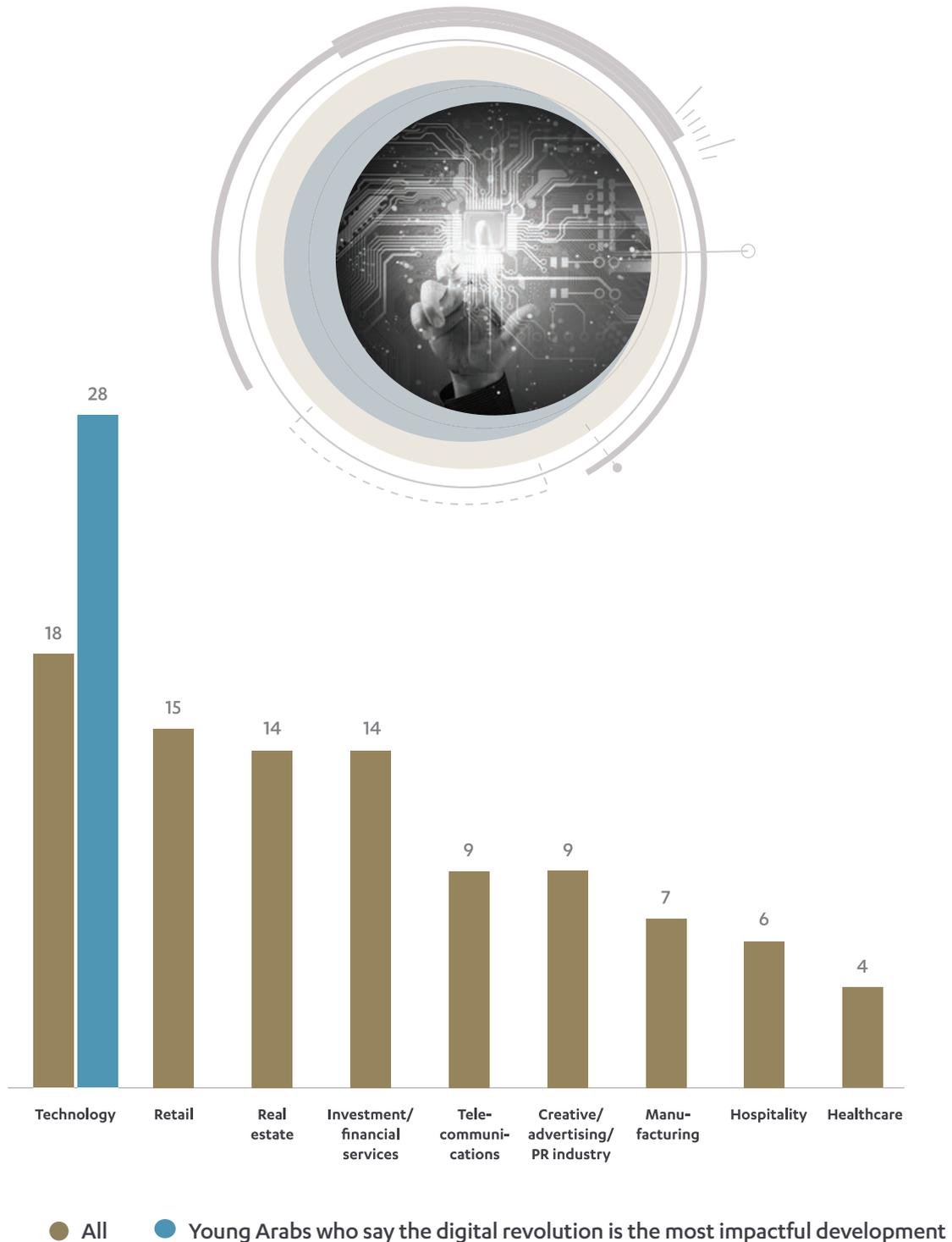


How positive or negative of an impact has this event or development had on the Arab world?



Technology is seen as the top sector among potential young Arab entrepreneurs, particularly those who say the digital revolution has had the biggest impact over the past decade

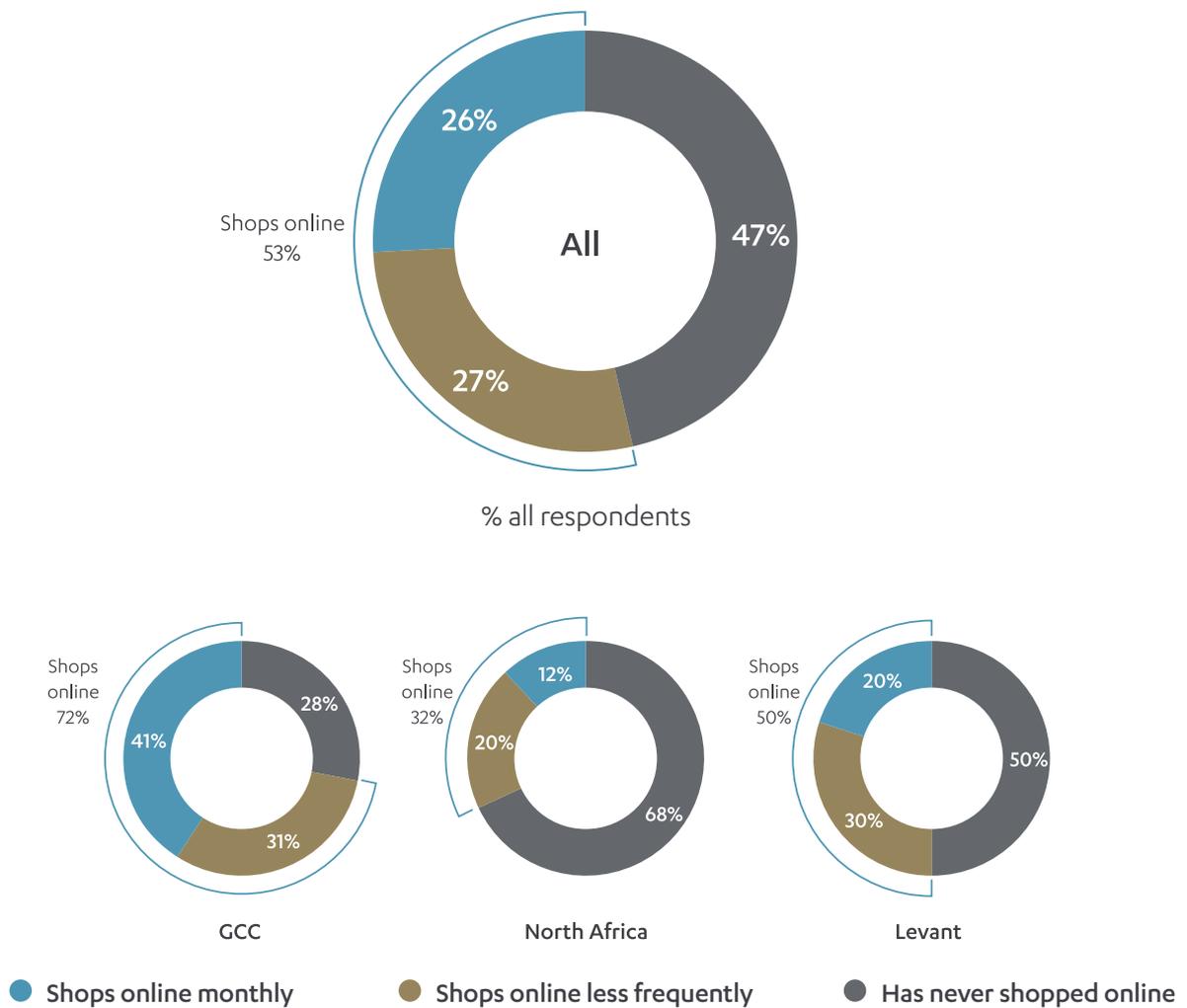
In which industry would you like to set up your business?



% all respondents

More than half of young Arabs say they shop online

How frequently, if at all, do you shop online?

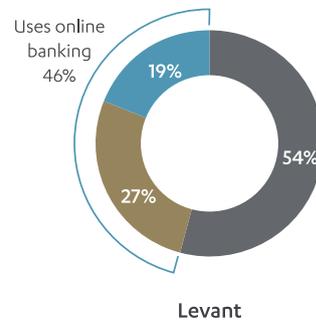
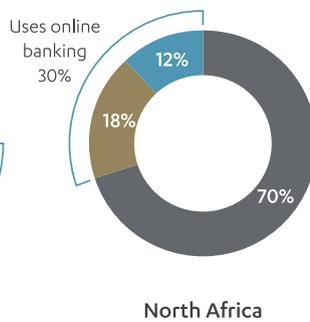
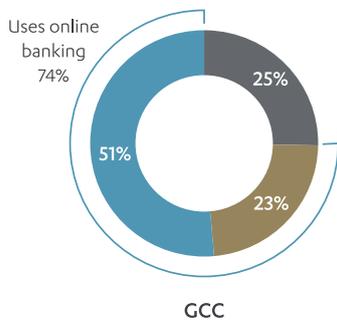
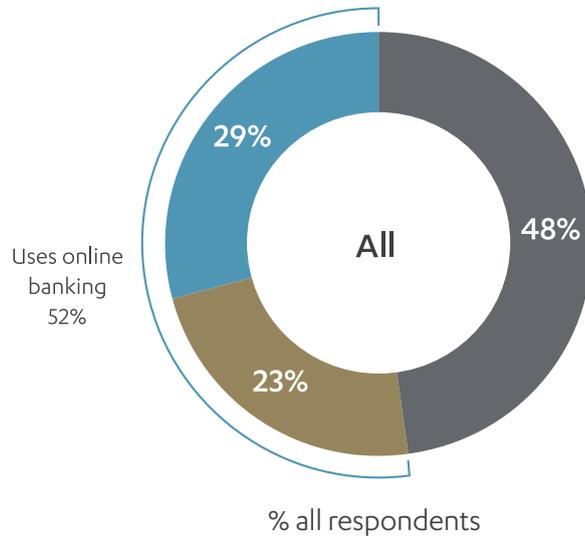


Which of the following, if any, would make you shop online more frequently?
Please select all that apply.



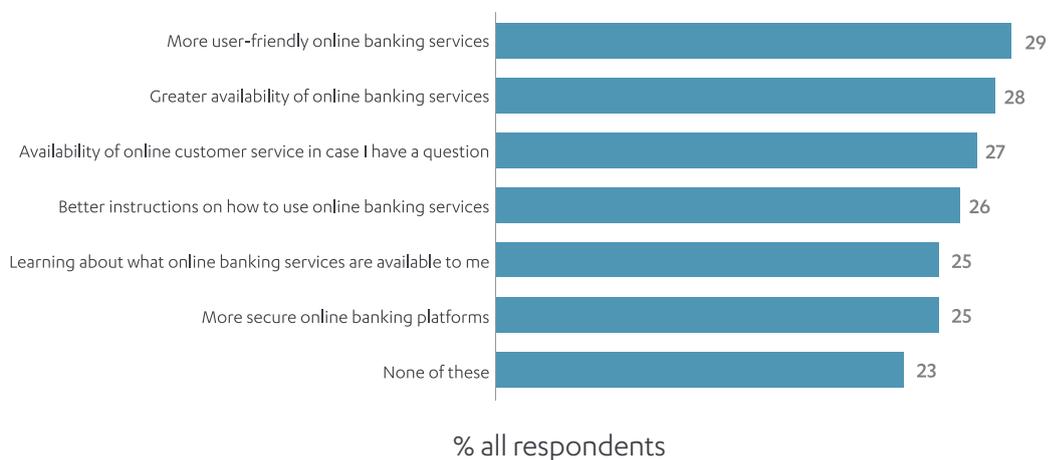
Online banking is another technology advance that few young Arabs use regularly

How frequently, if at all, do you use online banking?



● Uses online banking monthly ● Uses online banking less frequently ● Has never used online banking

Which of the following, if any, would make you use online banking services more frequently? Please select all that apply.





Bright future beckons – if entrepreneurial youth can rise to the challenge



Maysam Ali

Maysam Ali is Assistant Director of the Stevens Initiative, an international public-private partnership that connects youth in the US and the Middle East and North Africa through online educational programs. She was previously Deputy Director of Middle East Programs, leading Partners for a New Beginning, an economic development initiative promoting entrepreneurship in the MENA region. In this role, Maysam launched boards comprised of business and civic leaders in Jordan, Egypt, Libya, Algeria, Tunisia and Morocco, and forged partnerships with US-based businesses and early-stage investors to support the region's entrepreneurship ecosystem.



Arab parents and students alike are painfully aware that their national educational systems offer inadequate preparation for higher education and an increasingly globalised, hyper-competitive labour market.

Venture capitalists in Silicon Valley often encourage aspiring young entrepreneurs to think about resolving “big problems” rather than conceiving “big ideas”. In this context, the Middle East and North Africa – plagued by decades of instability, mismanagement, and stagnation – are overflowing with opportunities for enterprising and innovative Arab entrepreneurs. While the 2018 ASDA/A Burson Marsteller Arab Youth Survey reveals that 10 per cent of young Arabs believe the digital revolution to be the “most impactful” development in the Arab world over the last decade – after the rise of ISIS and the Arab Spring – this figure could increase dramatically in the coming decade, as four essential Arab ‘Es’ – education, employment, entertainment, and enterprise – are ripe for transformation.

Arab parents and students alike are painfully aware that their national educational systems offer inadequate preparation for higher education and an increasingly globalised, hyper-competitive labour market. The growing demand to supplement local education is being addressed by several regional start-ups. In 2012 Egyptian entrepreneurs launched Nafham (Arabic for “we understand”), an online platform that offers free video tutorials – similar to Khan Academy – for the national K-12 curriculum. It has since expanded to Kuwait, Algeria, Saudi Arabia and Syria.

At the higher education level, Edraak (meaning “realisation”), a ‘massive open online course (MOOC)’ platform similar to Coursera, is collaborating with the region’s leading universities, including the American Universities of Beirut and Cairo, to offer popular courses online for free.

Given that Arab governments have not yet approved the certification of online programs, and MOOCs have not yet proven to be sufficiently engaging for learners, these start-ups still face major hurdles.

Ineffective education systems have helped contribute to the Arab world’s 25 per cent youth unemployment rate, the highest in the world, according to the International Labour Organisation. Arab companies such as Akhtaboot and Nabbeesh – similar to LinkedIn and Upwork – have helped hundreds of thousands find employment and freelance work. More recent innovative start-ups are helping to teach technological proficiency. Repl.it offers online coding lessons. Dubai Wrappup, recently acquired by Silicon Valley’s Voicera, built an adept note-taking app powered by artificial intelligence. While these start-ups have been trailblazers in creating new digital jobs in the Arab world, there is still enormous work to be done to meaningfully reduce regional unemployment.

Arabic entertainment, along with media, has probably been the industry most transformed by the digital revolution. Kharabeesh (meaning “scribbles”), one of the first platforms for creative Arabic content, garners about 165 million views a month. High levels of smartphone penetration have allowed Arab millennials to create authentic visual stories about their lives that often cannot be found on conservative state media. Arab women like Hayla, a young Syrian from Aleppo whose comedic videos of Arab family dynamics have been viewed more than 5 million times, and Ola Malas, a Syrian living in Washington DC who recently launched a satirical video series tackling social taboos in the Arab world, are helping to lead this social transformation.



McKinsey & Company estimates that the digital market could add \$95 billion per year to the Middle East's annual GDP by 2020. While the next wave of digital transformation – including artificial intelligence, cloud computing, and virtual reality – offers a promising sign of what's to come, as the old Arab proverb goes, a single hand cannot clap. Success is a team effort, and both Arab business and Arab governments must rise to the challenge.



Young Arab entrepreneurs are continuing to launch companies despite the obstacles presented by political instability, excessive red tape, scant venture capital, and a business culture which penalises rather than celebrates failure.

In Saudi Arabia – which boasts the highest per capita consumption of social media and YouTube viewership – young people creating entertainment videos from the convenience of their living rooms are gaining millions of followers. Eager to capitalise on this trend, YouTube opened a studio in Dubai offering vloggers the tools, training, and studio space to create content. Audio content is next: journalists across the region are starting to experiment with Arabic podcasts and expect their listener base to grow in the coming years.

Finally, in a region famous for its world-class souks and merchants, the digital revolution is slowly but surely beginning to transform Arab commerce. Arab millennials increasingly use their smartphones to order food and transportation services via apps like Careem. Yet only 53 per cent of Arab youth – more in the Gulf than the Levant and North Africa – shop online due to a combination of high shipping costs, cumbersome customs regulations, obsolete online payment laws, and limited shopping options.

Given that only a small fraction of Arab businesses have an online presence, the majority of online purchases currently goes to regional behemoths like Souq.com (purchased by Amazon), newcomer noon.com or international outlets that offer shipping to the Middle East and North Africa. Fostering online Arab enterprise will require greater co-operation with local governments to improve the region's financial and logistics architecture to provide secure payment transactions and faster shipping.

As Chris Schroeder documents in his compelling book *Startup Rising*, young Arab entrepreneurs are continuing to launch companies despite the obstacles presented by political instability, excessive red tape, scant venture capital, and a business culture which penalises rather than celebrates failure.

In Morocco, a failed business risks a jail term for bankrupt owners. Tunisian tech entrepreneurs are lobbying their government to facilitate the process of shutting down failed startups, which can currently take up to a year. Algerian entrepreneurs have sought to wean customers away from the government – a bloated rentier – as the sole provider of services and introduce the concept of citizens as customers. In Jordan, the Arab world's largest online bookstore Jamalon is ingenuously battling government censorship while trying to grow its offerings.

The Arab world's first wave of digital transformation – in education, employment, entertainment and enterprise – has helped to address problems exacerbated by both governmental inadequacy and excessive government regulation. As more and more Arabs acquire access to high-speed mobile Internet with 4G-enabled smartphones, the opportunity for further growth – including in industries such as healthcare and transportation – is tremendous: McKinsey & Company estimates that the digital market could add \$95 billion per year to the Middle East's annual GDP by 2020. While the next wave of digital transformation – including artificial intelligence, cloud computing, and virtual reality – offers a promising sign of what's to come, as the old Arab proverb goes, a single hand cannot clap. Success is a team effort, and both Arab business and Arab governments must rise to the challenge.

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SOCIAL, ECONOMIC AND SOCIAL MEDIA INDICATORS 2018

Country	Population (million)	GDP PPP (US\$ billion – 2018 est.)	Contribution of oil to GDP (%)	Youth (15 to 24 years) unemployment (% of total labour force)	Internet users (million; 2018)	Internet penetration rate (%)	Facebook users (million; as of Jan. 2018)	Facebook penetration of population (%)	Active social media penetration (%)
GCC									
Bahrain	1.57	72.37	13.35	5.8	1.54	98	1.4	92	92
Kuwait	4.2	321	50	15.5	4.1	98	4.1	98	98
Qatar	2.7	359.2	55	0.5	2.64	99	2.64	99	99
Oman	4.83	198.7	46	48.2	3.3	68.5	2.6	55	55
Saudi Arabia	33.5	1,844.6	42	34.7	24.15	72	25	75	75
United Arab Emirates	9.5	729	30	5.1	9.4	99	9.38	99	99
GCC Total	56.3	3,524.87			45.13		45.12		

LEVANT & OTHER MIDDLE EAST									
Jordan	9.9	93	NA	39.8	6.3	63.6	5.8	59	59
Iraq	39.34	693.3	66	17.9	14	35.6	19	49	49
Lebanon	6.1	91.4	NA	16.5	4.6	75.4	4	66	66
Palestinian Territories	5.1	8.43	NA	40	3	59.7	1.6	32	32
Yemen	28.92	76.3	25	25.5	6.9	23.9	2	7.1	7.1
Levant & other ME Total	89.36	962.43			34.8		32.4		

NORTH AFRICA									
Algeria	42	646.4	30	23.9	21	50	21	50	50
Egypt	99.4	1,276.8	NA	34.4	49.23	49.5	39	40	40
Libya	6.5	84.4	60	45.9	3.8	59	3.8	59	59
Morocco	36.2	315.24	NA	18	22.6	62.4	16	44	44
Tunisia	11.6	142.76	NA	35.8	7.9	67.7	7.2	62	62
North Africa Total	195.7	2,465.6			104.53		87		

Sources:

- Population: <http://worldpopulationreview.com/countries/>
- GDP: International Monetary Fund - <https://bit.ly/2H5R8UL>; Trading Economics; <http://www.tradingeconomics.com>
- Share of oil in GDP: UAE – Minister of Economy (<https://bit.ly/2vAqL7q>); Bahrain – eGovernment (<https://bit.ly/2F9iICI>); IMF, The World Fact Book; OPEC (<http://www.opec.org>)
- Youth unemployment: World Bank, Nov. 2017 est; <https://bit.ly/2xsnLFO>; Palestinian Central Bureau of Statistics - <https://bit.ly/2K9hKfw>
- Internet users & penetration: <http://www.internetworldstats.com>;
- Facebook and active social media users and penetration rate; - Digital in 2018 (<https://wearesocial.com>); Internet World Stats; <http://www.internetworldstats.com>;