



**A WIDER
COMMUNICATIONS
PERSPECTIVE**

A global generation



- There are numerous similarities between Arab and Western youth
- Despite these commonalities, the hopes, fears and aspirations of Western and Middle East youth diverge – sometimes strikingly so
- There are a range of drivers of this divergence, including culture, religion and historical identity
- However, demographics may be the single most important factor:
 - One in five in the Middle East is between the ages of 15-24
 - By 2040, one in five Americans will be 65+

Objectives



ASDA'A Burson Marsteller commissioned a research survey with PSB and The Nielsen Company to understand the attitudes of the youth in the Middle East and compare them with those of their peers in the West.

This research looked at respondents aged 18-24:

- **Issues surrounding globalisation**
- **National identity**
- **Culture and religion**
- **Lifestyle**
- **Technology**

Methodology



Overall 1,800 interviews were completed across both the Middle East and West amongst respondents aged 18-24:

1,500 interviews across an even spread of the following countries:

-  ● Egypt (n=250)
-  ● Jordan (n=250)
-  ● Kuwait (n=250)
-  ● Saudi Arabia (n=250)
-  ● United Arab Emirates (n=250)
-  ● Qatar (n=250)

300 interviews amongst:

-  ● UK (n=100)
-  ● US (n=100)
-  ● Germany (n=100)

* The data has been weighted so that the West comprises 50% of the sample and the Middle East comprises 50%



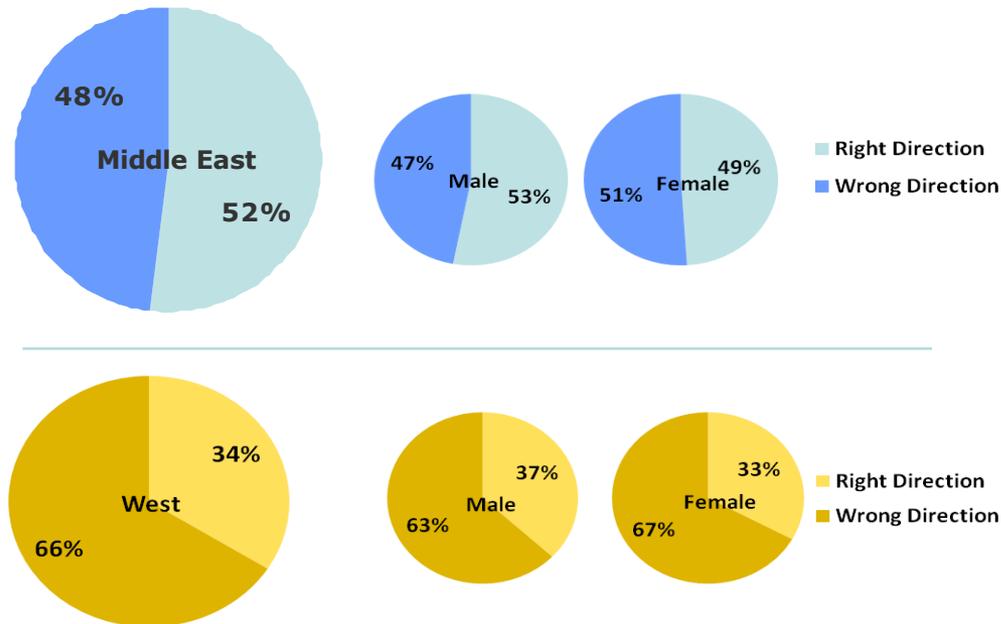
Top 10 Findings

Top 10 Findings



Western youth are generally pessimistic about the future, while Middle East youth are optimistic

Q: Do you think things in your country of residence are going in the right direction or are they going in the wrong direction?



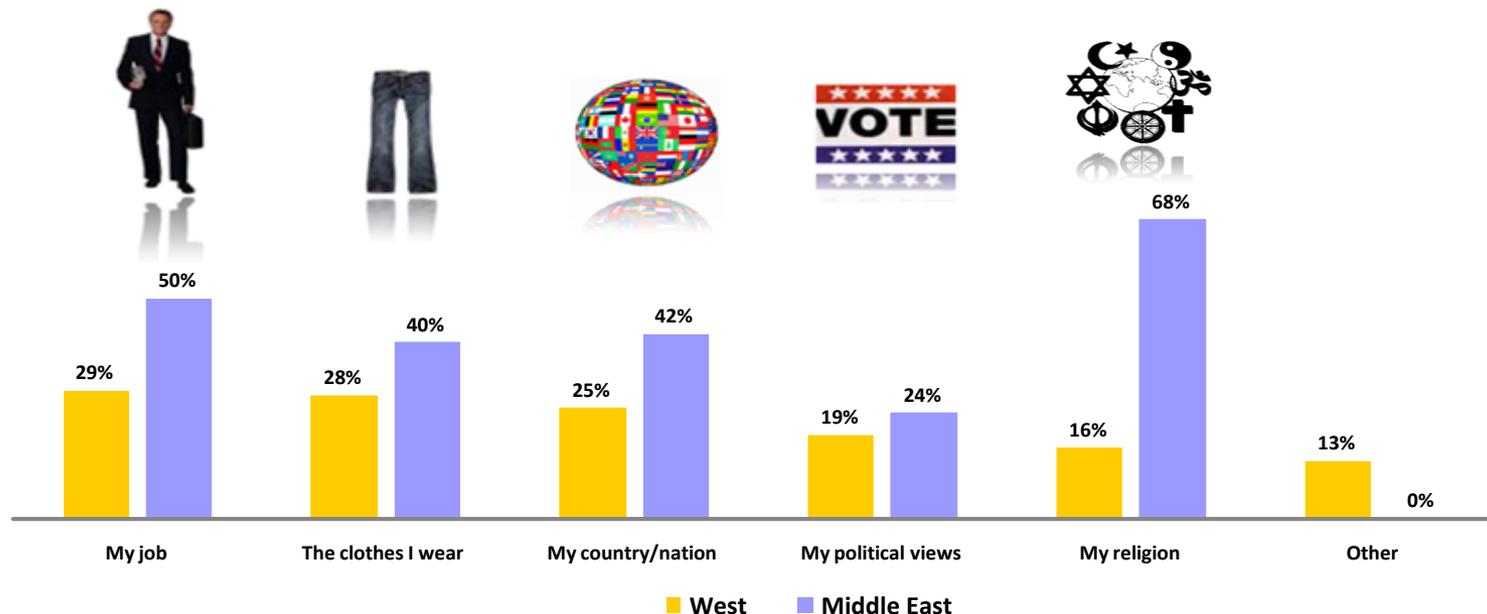
Just 34% of Western youth feel that things in their country are heading in the right direction. In the Middle East, youth are considerably more optimistic, with 52% arguing that their country is heading in the right direction.

Top 10 Findings



Religion is enormously important to Middle East youth, especially when compared to their Western peers

Q: Which of the following would you say defines who you are as a person?



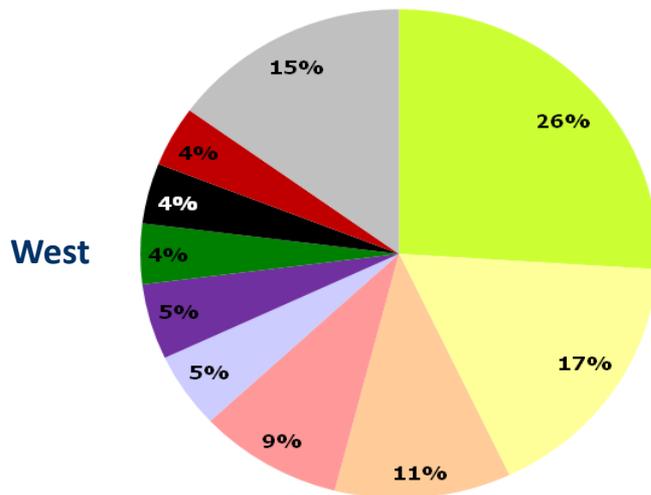
Some 68% of Middle East youth say that religion defines them as a person, compared to just 16% in the West. Asked to name an influence on them and their outlook on life, 62% of Middle East youth listed religion, compared to just 38% of their Western peers.

Top 10 Findings

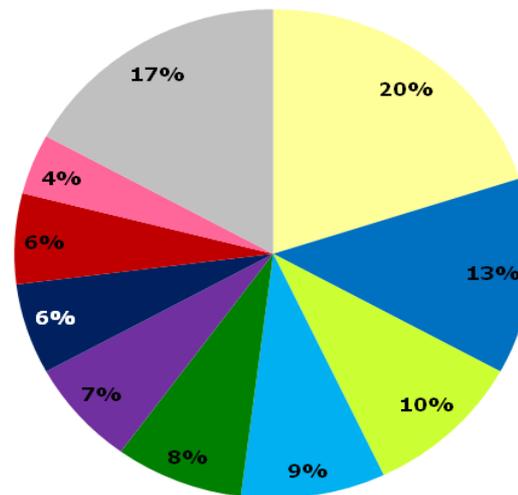


National identity and traditional values are extremely important to Arab youth, but not for their peers in the West

Q: What is the biggest challenge facing the world today?



- The economy
- Rising cost of living
- Climate change and the environment
- The gap between the rich and the poor
- Crime / law and order
- Unemployment
- Middle East conflicts
- Taxes
- International conflict
- Other



- Rising cost of living
- Corruption in government and public life
- The economy
- The loss of traditional values and culture
- Middle East conflicts
- Unemployment
- Human rights
- International conflict
- Political instability
- Other

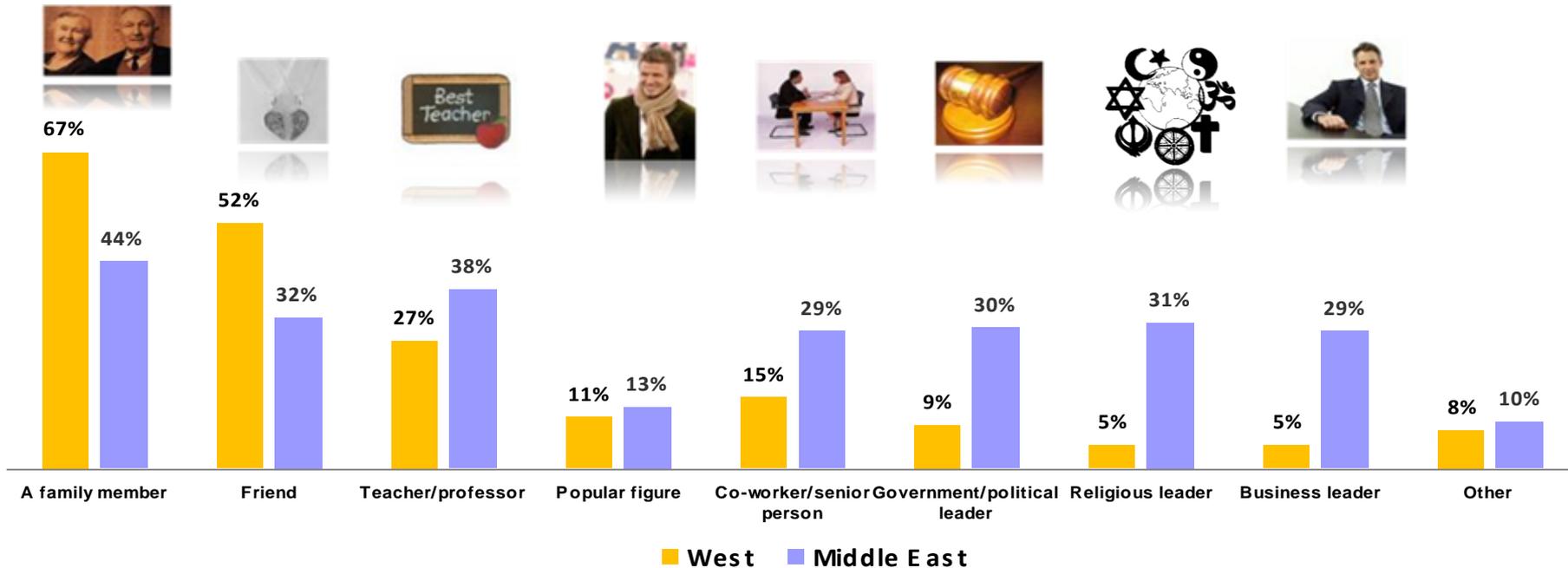
9% of Arab youth say that the loss of traditional values and culture is the greatest challenge facing the world today, a sentiment a statistically insignificant percentage of their Western peers agree with. Likewise, Arab youth generally very strongly agree that their national identity is very important to them, while Western youth view the same as only moderately important.

Top 10 Findings



Arab youth generally admire political, religious and business leaders, while Western youth do not

Q: Which of the following do you look up to?



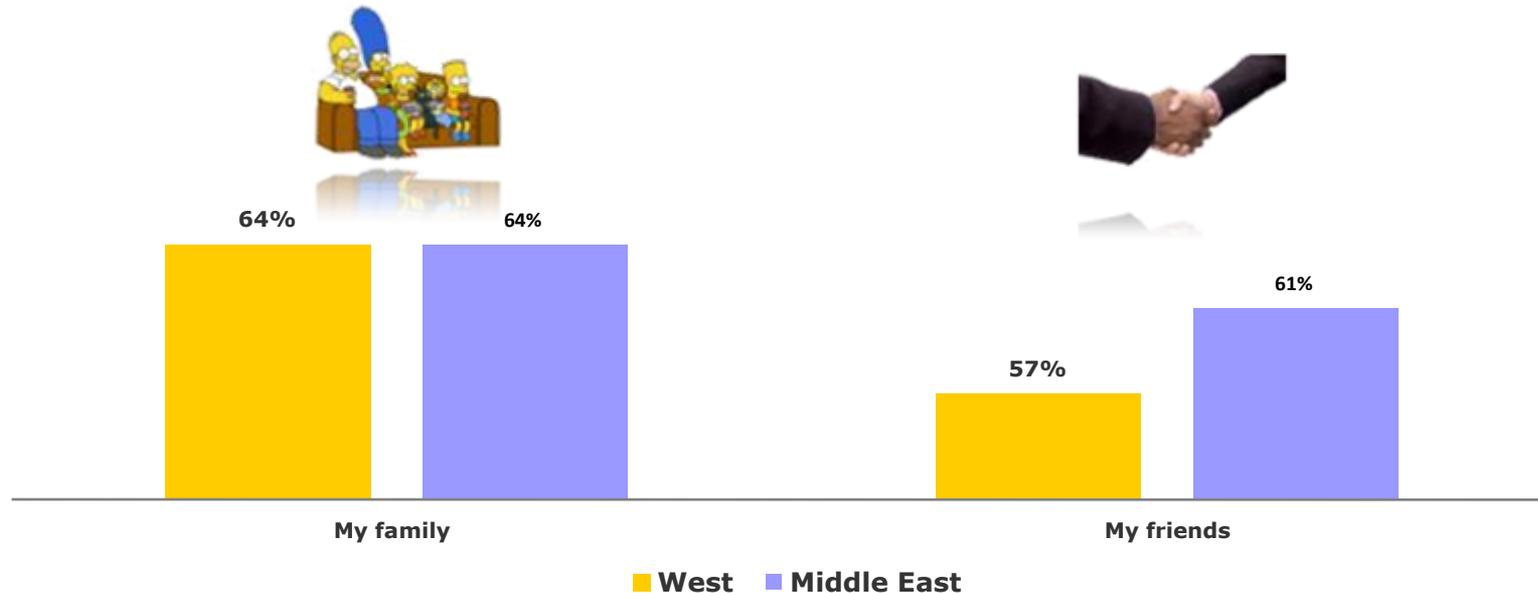
Asked whom they look up to, 30% of Arab youth cited government leaders, compared to just 9% of their Western peers. Likewise, while just 5% of Western youth said they looked up to religious leaders, 31% of Middle East youth claimed admiration for the same group. In the economic space, 29% of Arab youth look up to business leaders, a sentiment shared by only 5% of youth in the West.

Top 10 Findings



Family and friends are equally important to Middle East and Western youth

Q: Which of the following would you say defines who you are as a person?



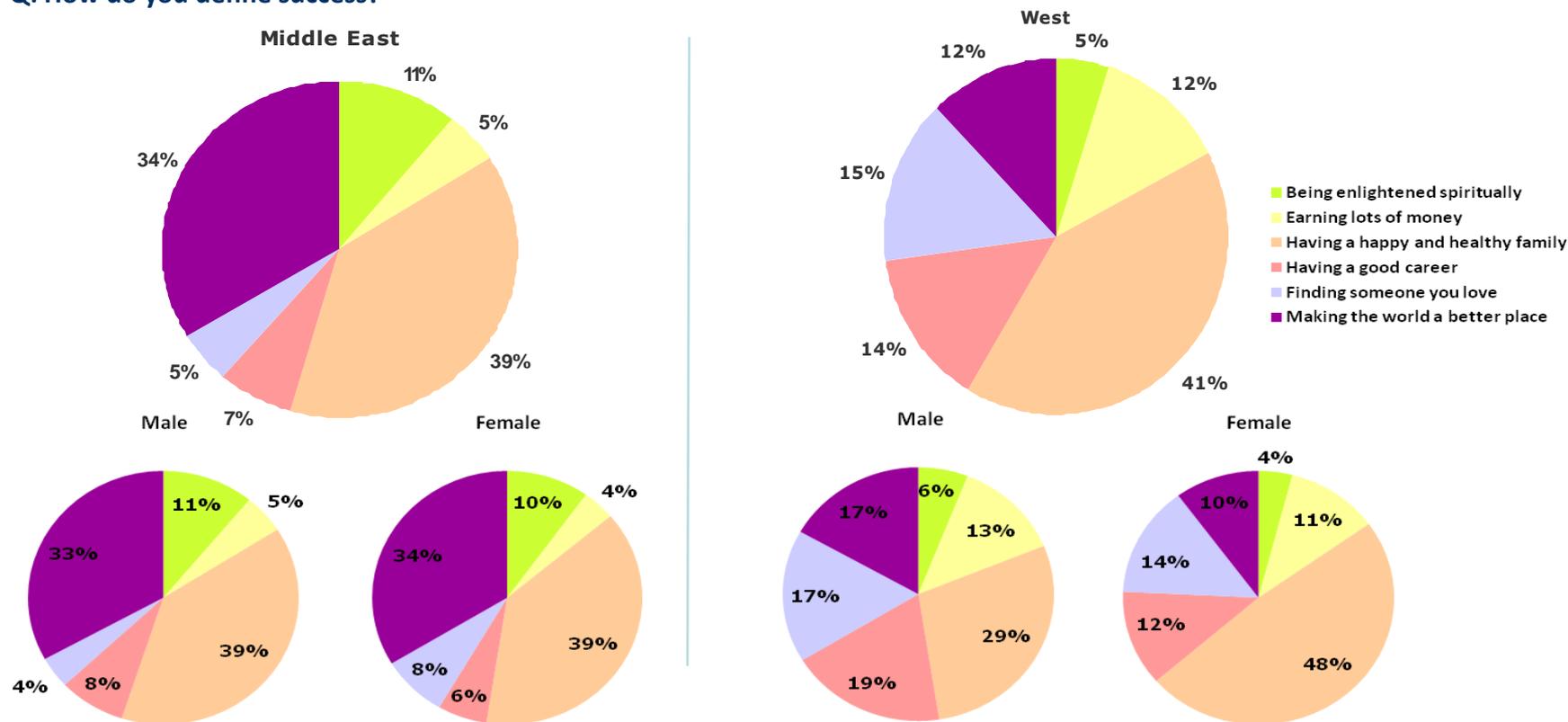
Precisely 64% of Arab and Western youth say that their family defines who they are as a person. The two also agree that friends are among the key determinants in defining their identity, with concurrence from 57% of Western youth and 61% of their Arab peers.

Top 10 Findings



Arab youth want to make a difference, while Western youth mostly just want to get ahead

Q: How do you define success?



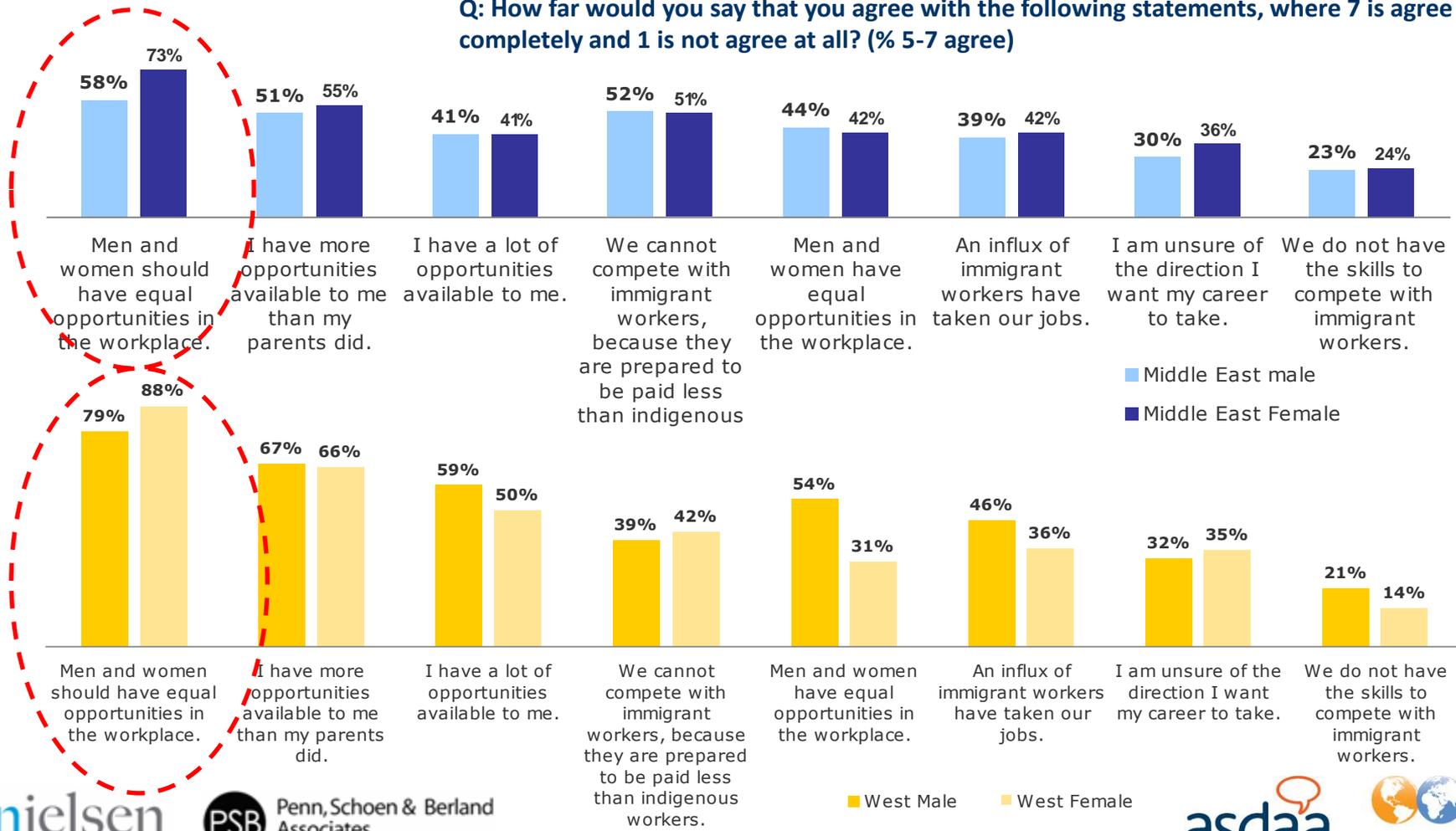
11% of Arab youth say success means being enlightened spiritually and 34% say it is making the world a better place – compared to 5% and 12%, respectively, in the West.

Top 10 Findings



Arab and Western male youth have very different opinions about gender equality in the workplace

Q: How far would you say that you agree with the following statements, where 7 is agree completely and 1 is not agree at all? (% 5-7 agree)



Top 10 Findings



Consumer and lifestyle habits of Arab and Western youth are strikingly similar

Q: What do you spend your money on?



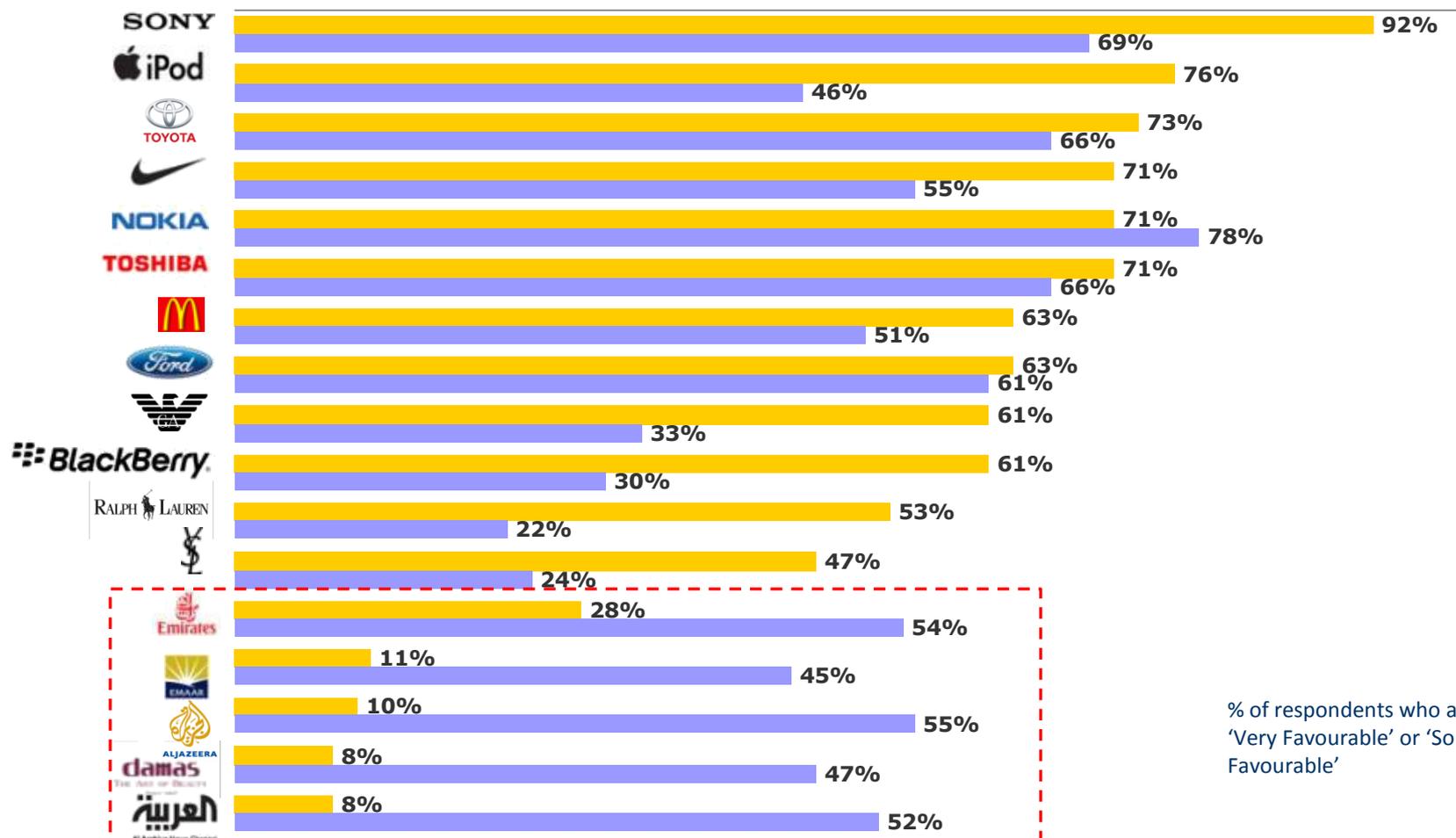
Young people in the West and Middle East indulge in similar activities, use similar technologies and have similar lifestyle habits. Both spend the majority of their disposable incomes on going out and shopping for clothes/shoes. Both groups constantly worry about their appearance.

Top 10 Findings



Global brands have transnational appeal among Middle East and Western youth

% of people FAVOURABLE towards the following brands:



% of respondents who answered 'Very Favourable' or 'Somewhat Favourable'

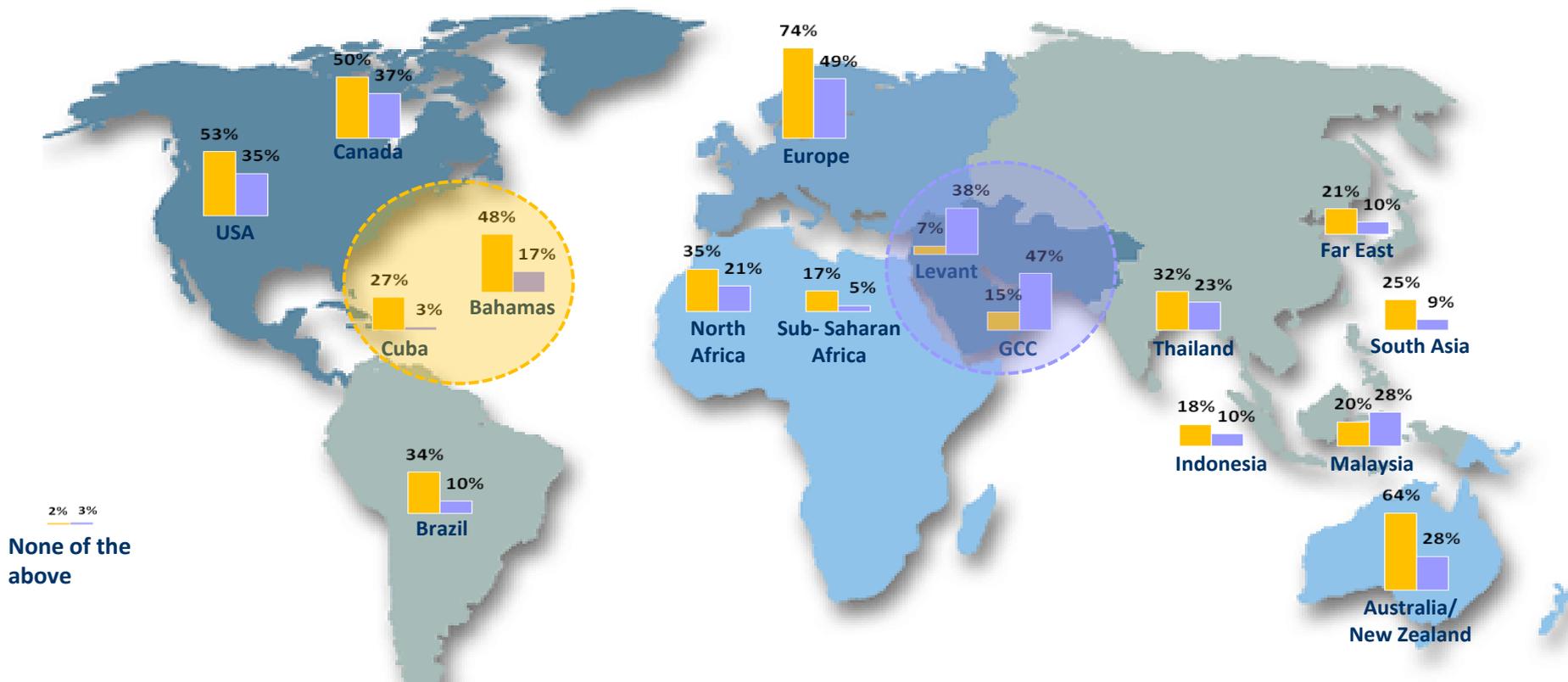
Top 10 Findings



Europe is the top desired travel destination for both Arab and Western youth

Q: Which of the following countries or regions would you be interested in travelling to in the near future?

■ West
■ Middle East



74% of Western youth and 49% of Arab youth would be interested in travelling to Europe in the future. Both groups would also be interested in travelling to North Africa – including 35% of Western youth and 21% of their Arab peers.

A global generation



- Despite volumes of rhetoric about a so-called clash of civilisations, youth from the Middle East and the West ultimately mirror one another as they cope with adolescence and adulthood.
- This insight is of great value to policymakers, marketers and anyone involved with communicating with the youth in these regions.
- More importantly, this bedrock commonality can also serve as a platform from which to build stronger ties between the West and the Middle East.