

12th Annual Edition 2020

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A VOICE FOR CHANGE

A White Paper on the findings of the 12th Annual ASDA'A BCW Arab Youth Survey 2020

Published in 2020 by ASDA'A BCW

A digital copy of this White Paper can be obtained from the ASDA'A BCW Arab Youth Survey website: arabyouthsurvey.com

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The ASDA'A BCW
Arab Youth Survey 2020
is dedicated to the Arab world's
over 200 million youth.

Special thanks to:

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



Contents

Introduction 04

Time for Arab youth dividend to pay off

Sunil John

President – Middle East of BCW and
Founder of ASDA'A BCW

Methodology 06

PSB conducted 4,000 interviews in
17 Arab countries/territories

Timeline 08

Key events of 2019 and Q1-3, 2020

Top 10 Findings 10

A range of actionable data and insights

Indicators 70

Social, economic and social media
indicators 2020

About us 71

ASDA'A BCW, PSB and Proof



Top 10 Findings

1 MIGRATION 12

Nearly half of young Arabs have considered leaving their country; one-third are more likely to emigrate due to COVID-19

2 PROTESTS 18

Hopeful for change, young Arabs in strife-hit nations support anti-government protests and COVID-19 could lead to more political unrest

3 CORRUPTION 24

Tackling government corruption is a top priority for Arab youth; majority say corruption still present despite the pandemic

4 PERSONAL DEBT 30

The number of young Arabs in personal debt is rising and household debt has increased since the pandemic

5 JOBS 34

Unemployment is a top issue and young Arabs are looking beyond traditional jobs; COVID-19 has made finding a job more difficult

6 IDENTITY 40

Religion is central to the personal identity of young Arabs, more so than family or nationality

7 GENDER RIGHTS 46

Most young Arab women say they have the same rights as men, but their work and family responsibilities are increasing since COVID-19

8 MODEL NATIONS 52

For the ninth year running, the UAE remains the top country to live in and emulate

9 FOREIGN RELATIONS 58

Saudi Arabia, the UAE and the US are seen as the three rising powers in the region

10 DIGITAL GENERATION 64

Young Arabs are increasingly embracing the digital revolution; use of online platforms has surged since the pandemic



Commentaries

28



Listen to the voice of pragmatism

Afshin Molavi

Senior Fellow at the Foreign Policy Institute of the Johns Hopkins University School of Advanced International Studies in Washington DC

38



COVID-19 accelerates need for a new social contract

Dr. Jihad Azour

Director of the International Monetary Fund's Middle East and Central Asia Department

44



Arab youth view religion as important but feel alienated from its current form

Eman Alhussein

Non-Resident Fellow at the Arab Gulf States Institute in Washington DC

50



More efforts needed to help women secure greater rights

Mina Al-Oraibi

Editor-in-Chief of The National, Abu Dhabi

56



UAE pioneers a new model of social, cultural and religious pluralism

Hussein Ibish

Senior Resident Scholar at the Arab Gulf States Institute in Washington DC

62



The anguish and rage of Sunni majority capitals on Iran's role

Kim Ghattas

Journalist, analyst and author of 'Black Wave: Saudi Arabia, Iran and the Forty-Year Rivalry that Unraveled Culture, Religion and Collective Memory in the Middle East'

68



'If you can't get them in eight seconds, you have lost them'

Muna Shikaki

Correspondent for Al-Arabiya News Channel, Washington DC

Time for Arab youth dividend to pay off



Sunil John

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

In 2008, while introducing the findings of our first Arab Youth Survey, I observed that the study aimed at understanding the largest demographic of the Middle East and North Africa (MENA) region - its over 200 million youth, constituting more than half the Arab world's population. I had further explained that it is imperative to connect with the hearts and minds of Arab youth "to ensure that they have the means to realise their full potential."

But why just young Arabs? Why invest in a survey to map their hopes, fears and aspirations?

.....

As I look back on the enormous wealth of data that our annual survey has collected all these 12 years, I see surprising instances of how the thoughts initially shared by young people in our face-to-face field interviews have mirrored the changing landscape of the region. In fact, several of our surveys did predict future events, including the Arab Spring. The continued discontent on the street among young Arabs – especially their sense of economic, political and social marginalisation – reflects in our 12th edition as well.

.....

Here are three reasons. When we launched the annual survey, the region was known for being data-poor on this important demographic segment, although the need to focus and nurture the MENA region's 'demographic dividend' was talked about in every global forum. Policymakers, businesses and media had few resources for insights on Arab youth, and the evidence-based findings of our survey filled a vital information gap.

Secondly, the study needed to be independent and credible, and hence we decided to fund the study ourselves. It was our contribution, in a small but significant way, for the good of society.

Thirdly, we wanted to provide the key findings of the survey openly on our website (arabyouthsurvey.com) freely to governments, the private sector and civil society, giving critical information on one of the world's most compelling socio-political landscapes, to drive informed decision-making and policy formation.

But we did not stop at just doing the survey and sharing data and findings on a public domain. We wanted to ensure that we add further value by inviting a panel of international experts to write opinion columns on the findings and offer rich context and insight, especially to help those who have a cursory acquaintance of the region. This year, we have seven seasoned commentators, who present compelling viewpoints that are invaluable in understanding the region better.

Unlocking enormous wealth of data

As I look back on the enormous wealth of data that our annual survey has collected all these 12 years, I see surprising instances of how the thoughts initially shared by young people in our face-to-face field interviews have mirrored the changing landscape of the region. In fact, several of our surveys did predict future events, including the Arab Spring. The continued discontent on the street among young Arabs – especially their sense of economic, political and social marginalisation – reflects in our 12th edition as well.

This year, our survey is even more comprehensive. We have not only covered 17 Arab states – the largest number to date – but in doing so, we have also expanded our geographic reach.

Having a young population does not automatically translate into a dividend for economic growth and prosperity. The decision makers in the region know that well enough and much has been said about the need for urgent action to tackle the growing issue of youth unemployment in the MENA region, which at 30 per cent is the highest in the world. It is high time to implement the right mix of policies, relevant education systems to develop a well-prepared workforce and an environment that celebrates private sector success in creating jobs and thus economic growth. Nobody wants another ‘lost generation’.

We have returned to Syria after nine years – a hiatus since 2011 due to the conflict and the rise of the terrorist group Daesh in that country. In the intervening years, our survey studied views of Arab youth on Daesh, and they repeatedly asserted the need to eradicate terrorism. With Daesh nearly defeated, Syria reenters our survey.

We have for the first time added Sudan to the survey, one of the more populous nations in North Africa, as a key geography to explore. Our decision to include it was further confirmed by the massive youth-led anti-government street protests the country witnessed in 2019, leading to a change in leadership.

From protests to the pandemic

Every year, we unveil the findings of the survey, conducted during the beginning months of the year, in April. With the COVID-19 pandemic and the subsequent lockdown in most parts of the region, we decided to delay the launch until we could find a proper window when decision makers had the bandwidth to absorb the survey's findings.

As we were looking for a new date for the launch, we realised the need to check the pulse on the street among young Arabs especially with the COVID-19 pandemic continuing to hold sway, to see if the crisis has indeed altered their perceptions and to validate the findings of the Main Survey. We were reassured when our COVID-19 Pulse Survey conducted in August confirmed the findings of our Main Survey.

Green shoots of peace

The region has also witnessed green shoots of peace in recent months. Peace negotiations in Libya and Yemen have gained momentum; Syria and Iraq are limping back to normality and the historic Abraham Accord signed by the UAE and Bahrain with Israel opens new avenues for collaboration.

The Gulf Co-operation Council states, on the other hand, face a different set of challenges – mainly, ballooning government deficits as a result of the steep fall in oil prices. The International Monetary Fund says oil revenues in the MENA nations decreased from US\$1 trillion in 2012 to US\$575 billion in 2019 and will hit a low of US\$300 billion this year. The GCC states alone stand to accumulate US\$490 billion in government deficits by 2023. That is a phenomenal drain on government spending, which for so long has been the economic bulwark of the Gulf states. There is need for a regionwide movement towards peace and prosperity and the first step is to reform age-old policies and devise a new social contract.

The youth dividend

The oldest cohort we interviewed this year, who are 24 years of age, were just 12 when we launched our survey in 2008. The youngest, the 18-year-olds, were six years of age then. And what a transformative phase they have lived through! As digital natives, they stand at the threshold of a new era. Their ‘Voice for Change’, reflected in our findings, is also a reminder that it is time the Arab youth dividend pays off.

Having a young population does not automatically translate into a dividend for economic growth and prosperity. The decision makers in the region know that well enough and much has been said about the need for urgent action to tackle the growing issue of youth unemployment in the MENA region, which at 30 per cent is the highest in the world. It is high time to implement the right mix of policies, relevant education systems to develop a well-prepared workforce and an environment that celebrates private sector success in creating jobs and thus economic growth. Nobody wants another ‘lost generation’.

Methodology: Main Survey

The 12th Annual ASDA'A BCW Arab Youth Survey 2020 was conducted by international research firm PSB to explore attitudes among Arab youth in 17 states in the Middle East and North Africa.

The study, covering 4,000 young Arabs aged 18 to 24, was conducted in two parts: The first Main Survey before the coronavirus outbreak, and the second COVID-19 Pulse Survey following the crisis.

The Main Survey was conducted in 17 Arab states between January 19 and March 3, 2020, before the COVID-19 crisis impacted the region. 3,400 face-to-face interviews were conducted by professional interviewers.

The interviews were completed in Arabic and English with young Arab men and women. The sample split was 50:50 male/female. The survey covered exclusively young nationals in each state.

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

The survey is the largest of its kind of the region's largest demographic, and covers five of the Gulf Cooperation Council states (Bahrain, Kuwait, Oman, Saudi Arabia and the UAE), North Africa (Algeria, Egypt, Libya, Morocco, Sudan and Tunisia), and the Levant (Jordan, Iraq, Lebanon, Palestinian Territories, Syria and Yemen). While the survey reincluded Syria this year, after nine years, Sudan is newly added to the sample.

The geographic location of respondents was considered by PSB when developing the fieldwork methodology for the Main Survey – with, for example, 40 per cent of UAE respondents in Abu Dhabi, 40 per cent in Dubai and 20 per cent in Sharjah.

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

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

Arab states covered originally in 2008								New in 2011
UAE	Oman	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon	Iraq
N=200 per country								
Dubai (40%)	Muscat (50%)	Manama (100%)	Jeddah (40%)	Kuwait City (20%)	Cairo (50%)	Amman (50%)	Saida (20%)	Baghdad (50%)
Sharjah (20%)			Riyadh (40%)	Al Hawalli (30%)	Alexandria (25%)	Irbid (25%)	Beirut (60%)	Irbil (25%)
Abu Dhabi (40%)	Batinah (50%)		Dammam (20%)	Al Ahmadi (20%)	Mansoura (25%)	Zarqa (25%)	Tripoli (20%)	Basrah (25%)
			Al Farwaniya (30%)					
New in 2012		New in 2013			New in 2014	Additional in 2020		
Tunisia	Libya	Algeria	Morocco	Yemen	Palestinian Territories	Syria	Sudan	
N=200 per country								
Tunis (50%)	Tripoli (50%)	Algiers (50%)	Casablanca (25%)	Sanaa (50%)	Gaza (50%)	Damascus (50%)	Khartoum (50%)	
Safaqs (25%)	Misrata (25%)	Oran (25%)	Fes (25%)	Al Hodaydah (25%)		Latakia (25%)	Port Sudan (25%)	
Susah (25%)	Benghazi (25%)	Constantine (25%)	Robat (25%)	Ta'izz (25%)	West Bank (50%)	Aleppo (13%)	Al Obeid (25%)	
			Marrakech (25%)			Homs (12%)		



Methodology: COVID-19 Pulse Survey



ARAB YOUTH COVID-19 Pulse Survey

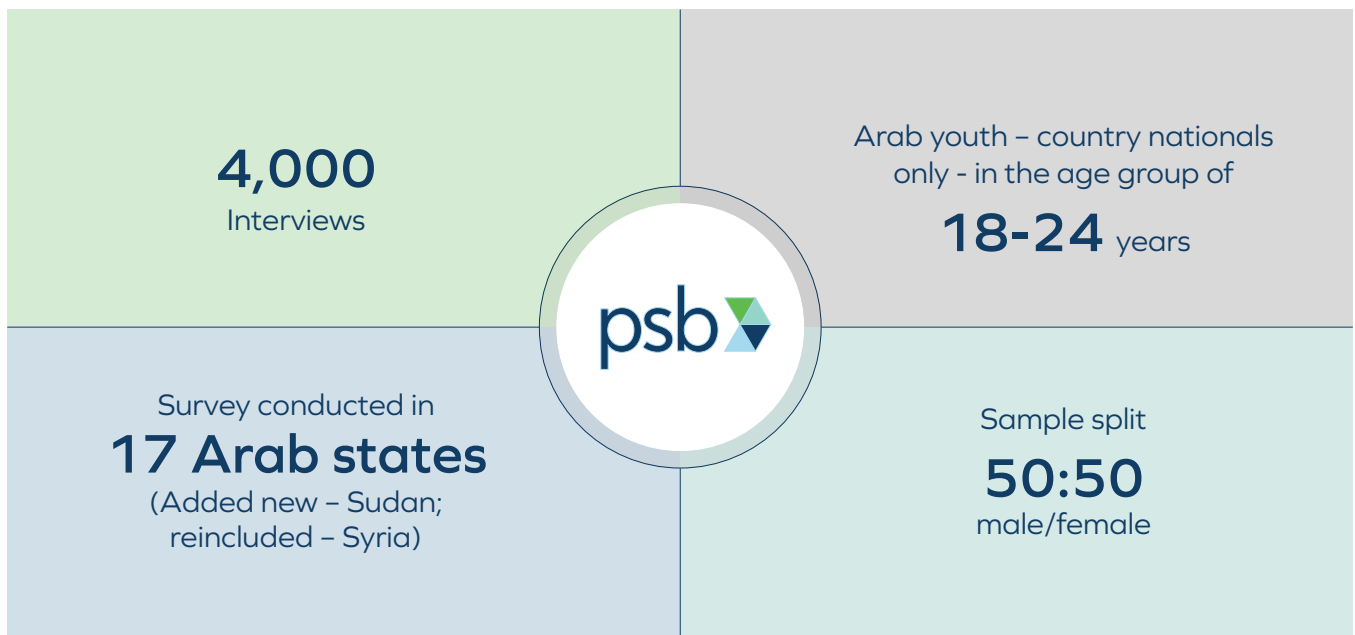
The COVID-19 Pulse Survey interviews were conducted between August 18 and 26, 2020, nearly six months after the completion of the main fieldwork of the 12th Annual Arab Youth Survey to understand the impact of COVID-19 on Arab youth and to validate the findings of the Main Survey.

Fieldwork took place shortly after the Beirut explosion, potentially having an impact on the perceptions and attitudes of Lebanese youth.

In all, 600 face-to-face and online interviews were conducted in Arabic and English among young Arab nationals of six countries in the region. The geographic location of the respondents included country capitals and other cities.

Margin of error for the COVID-19 Pulse Survey is +/- 4.0% for the total sample and larger for sub-groups. The sample details are as below:

Algeria (Online)	Egypt (Online)	Jordan (Online)	KSA (Online)	Lebanon (Online)	UAE (Face-to-face)
N= 100 per market					
Algiers (26%)	Cairo (38%)	Amman (57%)	Riyadh (40%)	Beirut (65%)	Dubai (40%)
Oran (3%)	Alexandria (33%)	Irbid (18%)	Jeddah (22%)	Tripoli (14%)	Sharjah (20%)
Constantine (3%)	Mansoura (17%)	Zarqa (9%)	Dammam (18%)	Saida (10%)	Abu Dhabi (40%)
Other (68%)	Other (12%)	Other (16%)	Other (20%)	Other (11%)	-





Key events of 2019 and Q1/2/3, 2020

<p>2019 / January →</p> <ul style="list-style-type: none"> • Anti-government protests in Sudan that began in December gather momentum; 19 people killed; 800 arrested • Qatar withdraws from OPEC; says it would focus on its natural gas industry 	<p>February →</p> <ul style="list-style-type: none"> • Pope Francis arrives in Abu Dhabi, UAE, becoming the first Pope to visit the Arabian Peninsula • Egyptian parliament approves measures to enable President Abdel Fattah El-Sisi to extend his rule until 2034 • Sudan's President Omar Al-Bashir declares national emergency, dismisses federal government and sacks all state governors • Protests in Algeria gain momentum as President Abdelaziz Bouteflika announces candidacy for fifth term as president 	<p>March →</p> <ul style="list-style-type: none"> • 50 people killed and 50 others injured in a terrorist attack on two mosques in Christchurch New Zealand • Syrian Democratic Forces announce the last Daesh territory has been retaken and raise flags in Baghuz, Syria • Pope Francis visits Morocco • US President Trump declares Golan Heights part of Israel • Kurdish-led Syrian Democratic Forces says Daesh is trounced
<p>June ←</p> <ul style="list-style-type: none"> • Tension rises in Sudan as 118 people reportedly killed in Khartoum as armed forces storm a protest camp; Sudanese Professionals Association calls for 'complete civil disobedience' • Two oil tankers attacked near Strait of Hormuz heightening US-Iran tensions 	<p>May ←</p> <ul style="list-style-type: none"> • UAE announces long-term visas for expats; Saudi Arabia says tourist visas to be issued to citizens of 49 countries from September • Palestine-Israeli conflict flares with airstrikes in Gaza killing over 20 Palestinians • At least 65 migrants drown off the coast of Tunisia when their boat capsizes after leaving Libya • Four commercial ships, including two Saudi Aramco oil tankers, damaged near port of Fujairah in UAE; US assessment blames Iran for the attack 	<p>April ←</p> <ul style="list-style-type: none"> • Abdelaziz Bouteflika resigns as president of Algeria amid widespread protests, after nearly two decades as president • Omar Al-Bashir is arrested and ousted from power in Sudan after three decades as president • General Khalifa Haftar's Libyan National Army advances to the capital Tripoli.
<p>July →</p> <ul style="list-style-type: none"> • Anti-government protests erupt in Iraq; protestors blockade Kuwaiti border and occupy oilfields • Air strike kills at least 40 people at Libyan migrant centre in Tripoli 	<p>August →</p> <ul style="list-style-type: none"> • Saudi Arabia grants women the right to apply for passports and to travel independently 	<p>September →</p> <ul style="list-style-type: none"> • Attack on Saudi Aramco facilities in Saudi Arabia, the world's largest processing plant at Abqaiq, and country's second largest oilfield at Khurais; Houthis claim responsibility

October →

- Youth-led protests (October Revolution) against corruption lead to resignation of Lebanese Prime Minister Saad Hariri
- Over 460 dead and 25,000 injured in protests, mostly led by youth, against corruption in Iraq
- Daesh leader Abu Bakr Al-Baghdadi killed in US military raid in northwest Syria

November →

- Power-sharing deal signed by Southern Transitional Council and Yemeni government in Riyadh
- 91 killed in police firing against protests by youth demanding reforms and end to corruption in Iraq; Prime Minister Abdel Abdul Mahdi resigns
- UAE ranks sixth globally in oil and gas reserves after discovery of massive new reserves

December →

- Saudi Aramco shares debut on Saudi Stock Exchange; at close to US\$2 trillion valuation, Saudi Aramco is world's most valuable company
- First coronavirus case reported in Wuhan, China
- Abdelmadjid Tebboune officially elected as president of Algeria, amidst boycotts
- UN report says number of international migrants worldwide in 2019 is nearly 272 million, up from 221 million in 2010; 3.5% of the world population was international migrants and 10.6% refugees and asylum-seekers

February ←

- Saudi Arabia closes Holy Cities of Makkah and Madinah to foreign pilgrims as fears of coronavirus outbreak grows
- Lebanon reports first case of coronavirus; closes educational institutions

2020 / January ←

- US drone strike kills Iranian commander, Maj. Gen. Qassem Soleimani outside Baghdad airport in Iraq
- Sultan Qaboos bin Said of Oman, the longest serving leader in the Gulf region, dies; smooth transition to Sultan Haitham Bin Tarik
- Libyan civil war simmers; Turkish President Recep Tayyip Erdoğan announces deployment of Turkish troops

←

- Palestinians dismiss US President Trump's Middle East peace plan
- Lebanon forms new government under PM Hassan Diab
- **ASDA'S BCW ARAB YOUTH SURVEY FIELD WORK BEGINS ON JAN 9**

March →

- WHO declares COVID-19 as global pandemic
- Several countries in the region declare lockdowns and travel restrictions
- Weak demand pushes oil prices to 17-year low - below US\$25 a barrel

April →

- Price of a barrel of West Texas Intermediate (WTI), the benchmark for US oil, falls as low as minus US\$37.63 per barrel
- Global coronavirus cases pass one million mark; deaths exceed 233,000 by month-end.

May →

- Palestine terminates agreements with Israel and US in response to Israel's plans to annex Jordan Valley
- Number of COVID-19 cases globally crosses 5 million; death toll crosses 364,000 by month-end

August ←

- UAE opens first commercial nuclear power station in the Arab world
- Beirut port blast kills over 200 and injures more than 6,000; economic damage valued at over US\$15 billion
- UAE and Israel sign historic agreement to normalise relations
- COVID-19 cases pass over 25 million worldwide; death toll crosses 843,000 by month-end

July ←

- UAE successfully launches Mars bound Hope Probe making it the Arab world's first interplanetary mission
- Russia announces reopening of its embassy in Libya
- Sudan passes into law several long-awaited amendments to improve human rights; former President Omar Al-Bashir goes on trial

June ←

- Libya's Govt of National Accord announces full control of Tripoli
- Russia kicks off referendum on constitutional changes that could keep Putin in power until 2036
- Black Lives Matter protests intensify in the US
- As currency falls rapidly, Lebanese citizens take to streets on anti-government protests



What do 200 million Arab youth have to say about their future?



1

MIGRATION

Nearly half of young Arabs have considered leaving their country; one-third are more likely to emigrate due to COVID-19



2

PROTESTS

Hopeful for change, young Arabs in strife-hit nations support anti-government protests and COVID-19 could lead to more political unrest



3

CORRUPTION

Tackling government corruption is a top priority for Arab youth; majority say corruption still present despite the pandemic



4

PERSONAL DEBT

The number of young Arabs in personal debt is rising and household debt has increased since the pandemic



5

JOB

Unemployment is a top issue and young Arabs are looking beyond traditional jobs; COVID-19 has made finding a job more difficult



6

IDENTITY

Religion is central to the personal identity of young Arabs, more so than family or nationality



7

GENDER RIGHTS

Most young Arab women say they have the same rights as men, but their work and family responsibilities are increasing since COVID-19



8

MODEL NATIONS

For the ninth year running, the UAE remains the top country to live in and emulate



9

FOREIGN RELATIONS

Saudi Arabia, UAE and US are seen as the three rising powers in the region



10

DIGITAL GENERATION

Young Arabs are increasingly embracing the digital revolution; use of online platforms has surged since the pandemic



1

MIGRATION

Nearly half of young Arabs have considered leaving their country; one-third are more likely to emigrate due to COVID-19

The Arab world could face a talent erosion as many young people actively consider leaving their country, many for good, seeking more opportunities.

When asked whether they are actively trying to migrate or have considered migrating but not actively, 42 per cent of young Arabs said they have considered emigrating to another country, of them 15 per cent actively.

One in three (32 per cent) said they would never leave their country, while one in four (25 per cent) young Arabs said they have not considered migrating but could do so in the future.

Migration as a choice is most dominant among youth in the Levant, where nearly two-thirds (63 per cent) of young citizens are actively considering it. Young people in the Gulf Cooperation Council (GCC) nations are least prone to leave their country, with only 13 per cent on average stating they may try to emigrate, but nearly one in two (47 per cent) of young people in North Africa are actively pursuing new pastures.

The wish to migrate is most expressed by young Arabs in Lebanon (77 per cent), Libya (69 per cent), Yemen (66 per cent) and Iraq (65 per cent).

Young Emiratis (97 per cent) and Saudis (94 per cent) are least likely to consider emigration. Apart from GCC nations, potential youth migration is also comparatively lower in Egypt at 26 per cent.

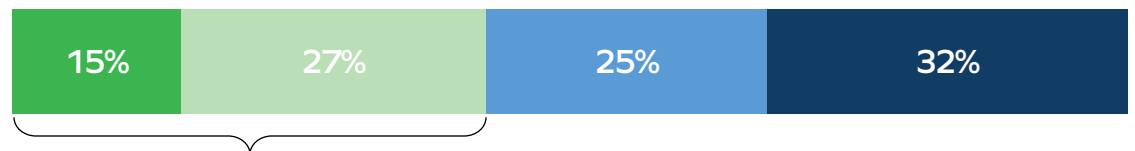
Young Arabs consider emigration largely due to economic factors and corruption in their country. Among youth actively trying to migrate or have considered migrating, economic factors, cited by 24 per cent – nearly one in four, are the main reason followed by corruption (16 per cent). Lack of education opportunities, seeking new experiences and security concerns (12 per cent each) are the other top reasons for potential Arab youth migration.

Among youth who were actively considering emigration, 60 per cent said they want to leave temporarily with more people from the Levant (nearly 50 per cent) wishing to leave their nations for good. Nearly one-third (29 per cent) of all who are actively trying to migrate or considering emigration say moving to another country is their top personal goal for the next decade, while 16 per cent said they want to establish a successful career and 15 per cent said finishing their education are top personal priorities over the next 10 years.



Two in five young Arabs have considered leaving their country

? As you know, some people leave their country and emigrate to another country. Which of the following best describes you?

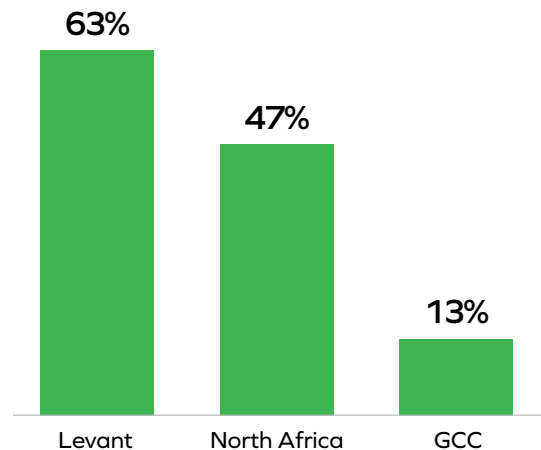


42%
of all Arab youth have considered emigrating to another country

(Showing % 'Actively trying to emigrate' / 'Have considered emigrating')

- I am actively trying to emigrate to another country
- I have considered emigrating to another country, but I am not actively trying to leave
- I have not considered emigrating to another country, but could do so in the future
- I would never leave my country

(Not including 'Don't know')

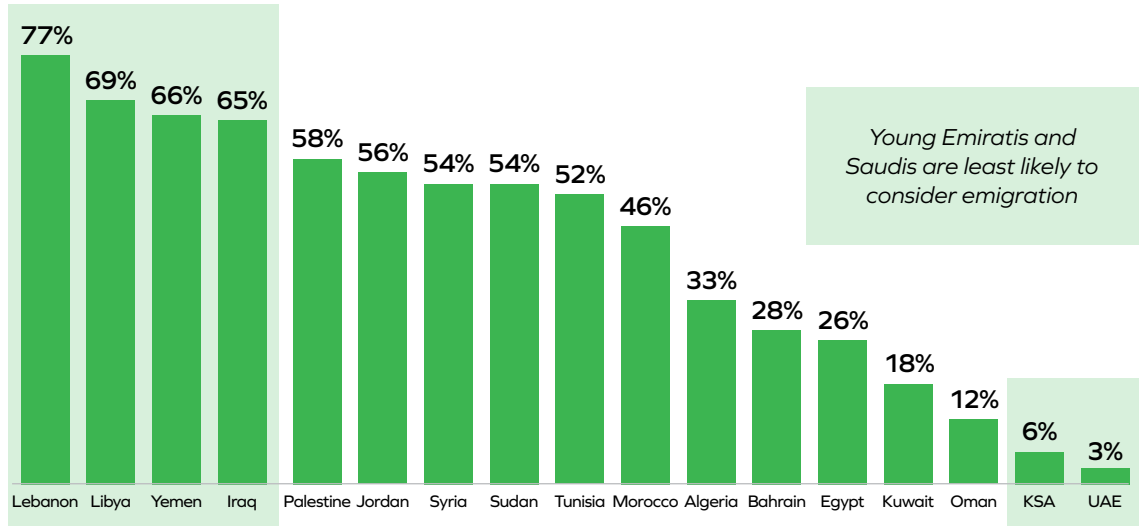




Potential youth emigration is particularly high in Lebanon, Libya, Yemen and Iraq

As you know, some people leave their country and emigrate to another country. Which of the following best describes you?

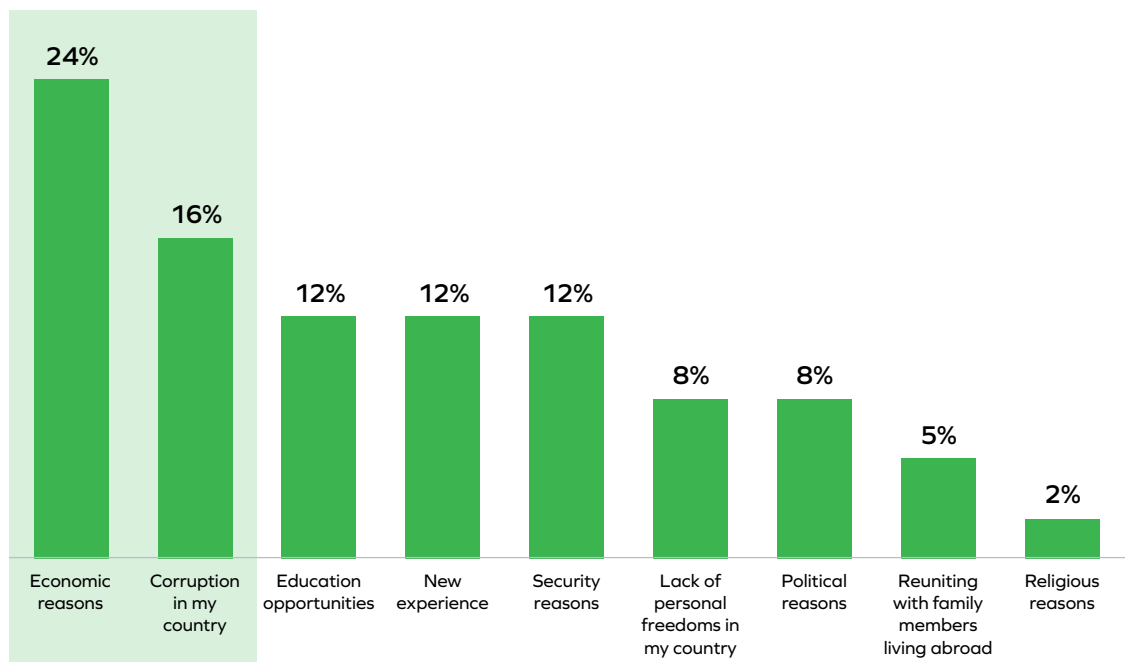
(Showing % among youth 'Actively trying to emigrate' / 'Have considered emigrating')



Economic factors and corruption are the two strongest drivers of emigration among Arab youth

Which of the following, if any, is the main reason why you might consider emigrating to another country?

(Showing % among youth 'Actively trying to emigrate' / 'Have considered emigrating')

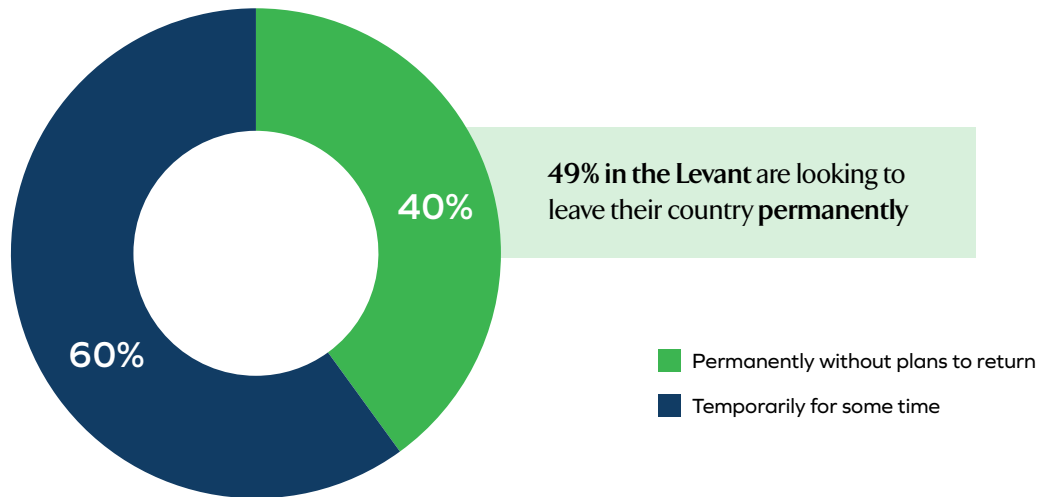




Two in five of potential emigrants say they would leave their country permanently

? If you were to emigrate, you would be leaving your country...?

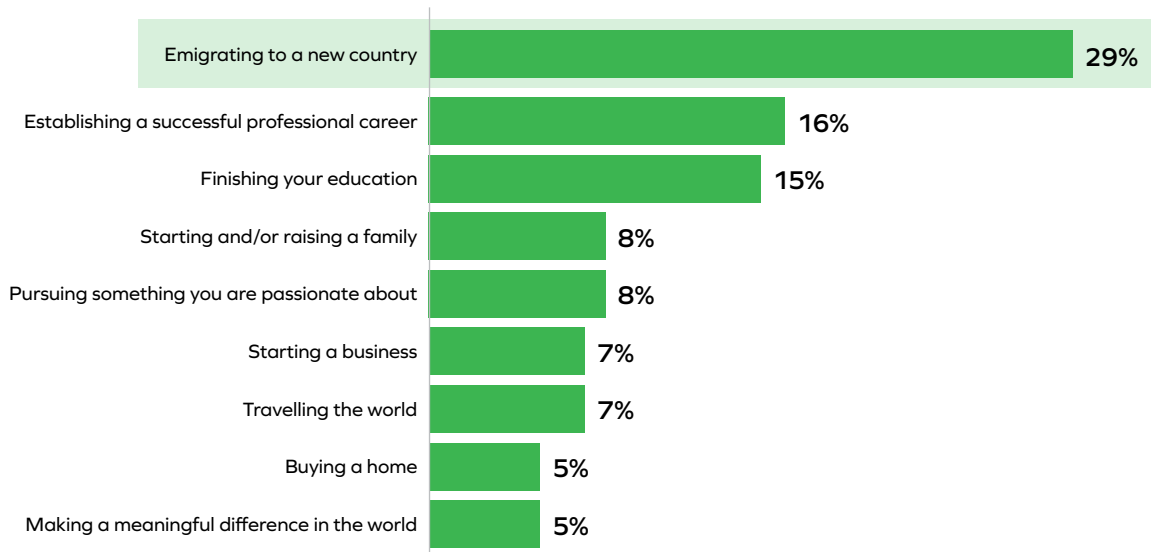
(Showing % among youth 'Actively trying to emigrate' / 'Have considered emigrating')



For those considering emigration, moving to a new country is the top personal goal over the next decade

? Now thinking about the next 10 years, what are you personally most looking forward to?

(Showing % among youth 'Actively trying to emigrate' / 'Have considered emigrating')





ARAB YOUTH COVID-19 Pulse Survey

Nearly one-third of Arab youth are more likely to emigrate due to the impact of COVID-19

Following the coronavirus outbreak that has impacted the region – economically and socially – the tendency to seek greener pastures has only strengthened among Arab youth. However, the sentiment is more predominant in the Levant and North Africa than in the GCC states.

When asked ‘thinking about the impact of COVID-19, has it made you more or less likely to emigrate to another country?’ nearly one-third (32 per cent) of young Arabs said they are ‘more likely to emigrate’.

While 77 per cent of Lebanese youth (over three-quarters) are more likely to emigrate, at the other end of the spectrum, all young nationals in the UAE prefer to live in their home-nation, with zero per cent saying they are ‘more likely’ to leave their country.

Less than half of young Algerians (41 per cent) and one in three young Jordanians and Egyptians (33 per cent each) too are keener to emigrate as a result of COVID-19, while only 9 per cent of young Saudis say they are ‘more likely’ to emigrate to another country.

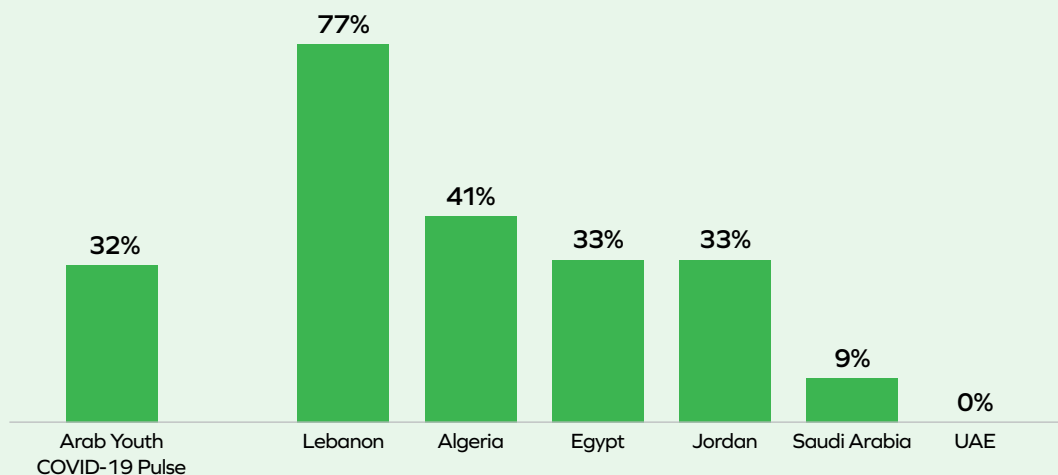


COVID-19 has made Lebanese youth even more likely to emigrate



Thinking about the impact of COVID-19, has it made you more or less likely to emigrate to another country?

(Showing % ‘More likely to emigrate’)







2

PROTESTS

Hopeful for change, young Arabs in strife-hit nations support anti-government protests and COVID-19 could lead to more political unrest

Following the events of the Arab Spring, when young Arabs in many countries took to the streets, calling for reforms and an end to corruption, four nations witnessed a change in government – Egypt, Libya, Tunisia and Yemen. Eight years later, 2019 recorded a similar surge in youth-led protests, especially in Algeria, Iraq, Lebanon and Sudan, once again, leading to changes in leadership.

When asked specifically, to young people in these four nations, 82 per cent of young people in Lebanon, 89 per cent each in Algeria and Iraq, and 88 per cent in Sudan said they supported the anti-government protests.

Young Arabs in Iraq (82 per cent) are most optimistic that the protests will lead to real positive change. In Sudan, nearly three in four (70 per cent) young people say the protests will lead to real positive change, while in Algeria, though 64 per cent are hopeful of positive outcomes, 28 per cent (nearly one-third) say the protests will have little long-term impact. A similar scepticism prevails among young people in Lebanon where 40 per cent say the protests will have little long-term impact, while 54 per cent are hopeful of positive outcomes. However, about one in four (24 per cent) Sudanese youth said the protests could lead to real negative change.

Young people in other parts of the Arab world were asked if they expect similar anti-government protests to take place in their country over the next year. A majority of young people (86 per cent) in Libya believe so, while more than half in Tunisia and Yemen (56 per cent) expect protests to hit their streets.

A similar outlook prevails among young Arabs in Syria (46 per cent) and Palestine (44 per cent). More than one-third young Arabs in Egypt (40 per cent) and Jordan (39) too share the view that anti-government protests are likely in their country.

Across all regions in the survey, young people believe that corruption and bad governance are the main catalysts for the protests. When asked what they think were the reasons for the social unrest and protests that the Arab world witnessed in 2019, 40 per cent cited corruption and bad governance, mirroring a top finding of the 2012 Arab Youth Survey, just after the events of the Arab Spring, when 42 per cent of Arab youth cited corruption in government and public life as one of the biggest challenges facing the region, up from 16 per cent in 2011.

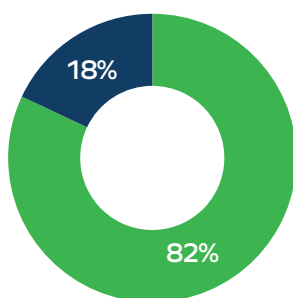
Young Arabs said lack of quality jobs (29 per cent) – a recurring concern raised by them in successive Arab Youth Surveys; lack of social justice (27 per cent); foreign interference and weak public services in education and health (25 per cent each) are other factors that ignite social unrest.



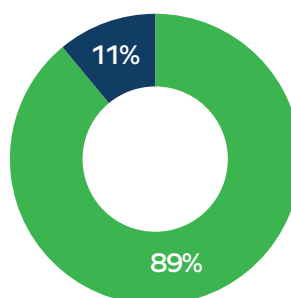
The 2019 protests in Lebanon, Algeria, Iraq and Sudan are widely supported by youth across these four countries

? How strongly do you support or oppose the anti-government protests?

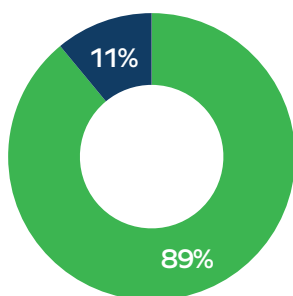
Protests in Lebanon
(Among Lebanese Youth)



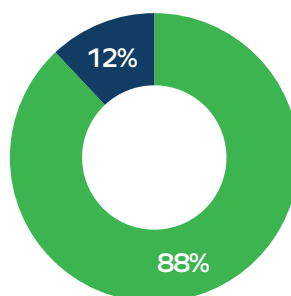
Protests in Algeria
(Among Algerian Youth)



Protests in Iraq
(Among Iraqi Youth)



Protests in Sudan
(Among Sudanese Youth)



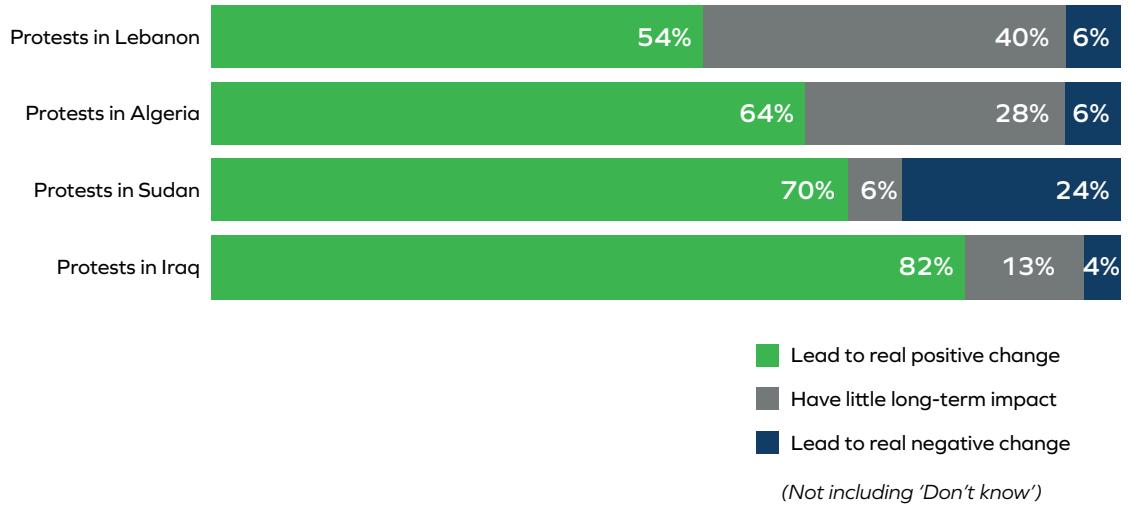
■ Support
■ Oppose



Majority of youth in the four countries expect protests to lead to real positive change

? Do you think the anti-government protests in this country will ultimately...?

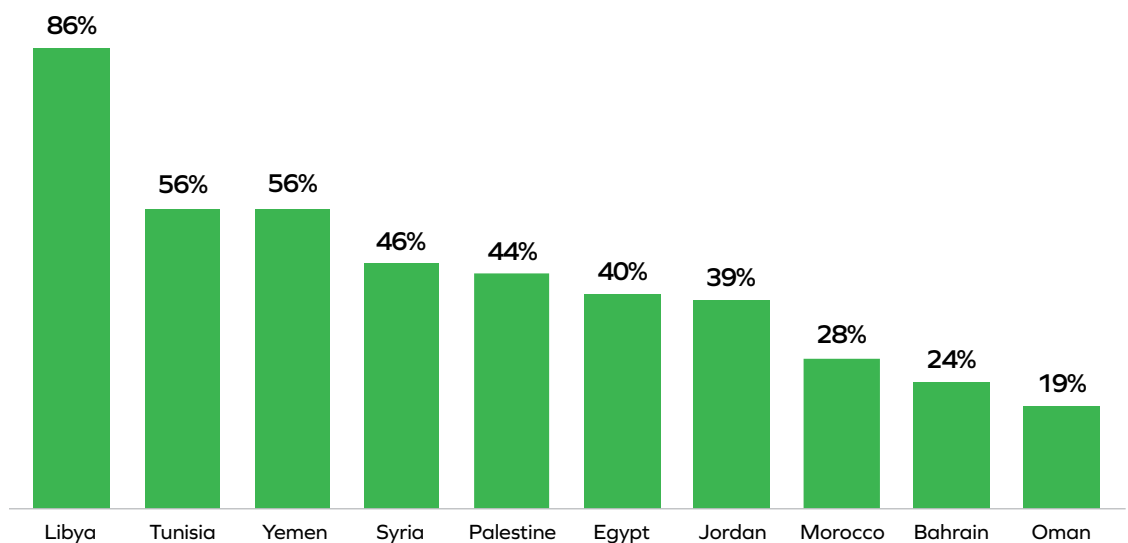
(Showing % among youth in each of the four countries: Iraq, Sudan, Algeria and Lebanon)



Many young Arabs across the region do not rule out popular protests in their own countries

? Thinking about your own country, how likely do you think it is that similar anti-government protests could take place in your country over the next year?

(Showing Top 10 countries)

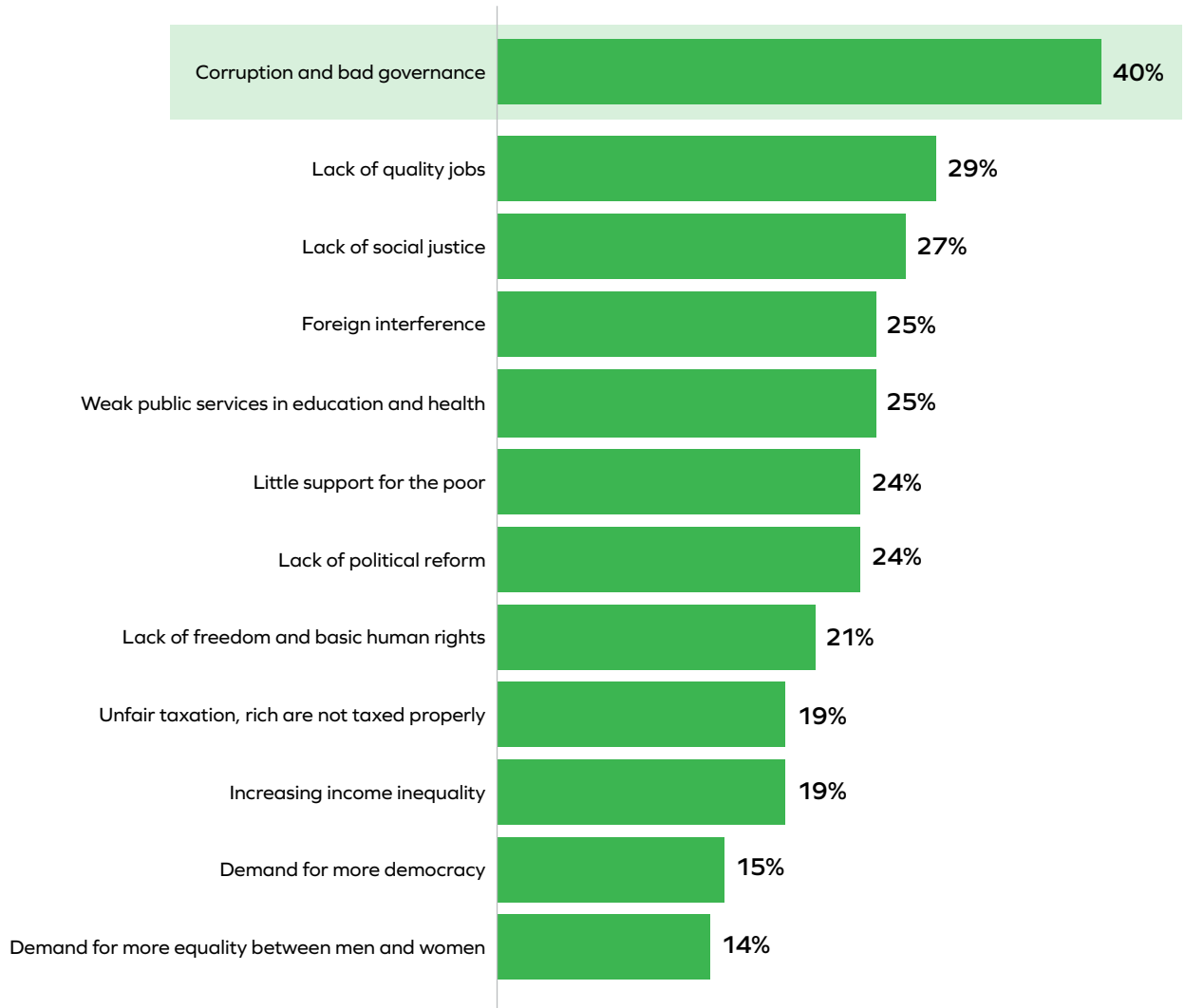




Corruption and bad governance are viewed as the main catalysts for the protests

? What do you think are the main reasons for the social unrest and protests that took place around the region in 2019? Please choose up to three reasons.

(Among all)





ARAB YOUTH
COVID-19
Pulse Survey

COVID-19 could lead to further political unrest, especially in Lebanon

The wave of protests that the region witnessed in 2019 could spike following COVID-19, which has further deprived young people of job opportunities. Similar to the sentiment shared about potential migration, opinion is divided with more young people in the Levant and North Africa citing protests as being more likely due to the impact of COVID-19 compared to their counterparts in the GCC.

When asked 'thinking about the impact of COVID-19, has it made protests against the political status quo more or less likely in your country', nearly three-quarters (73 per cent) of young Lebanese said protests are 'much more or somewhat more likely', while less than half (41 per cent) of young Egyptians and one in three young Jordanians echoed the view.

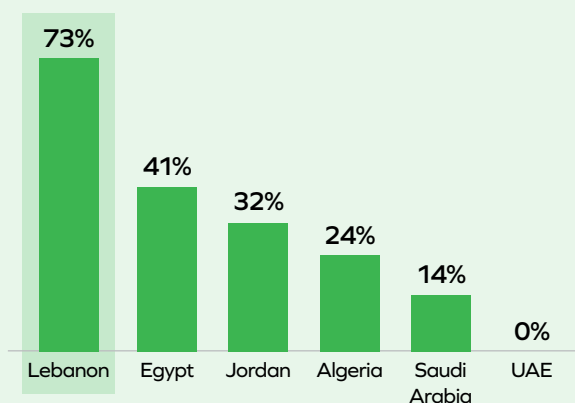
About a quarter (24 per cent) – one in four – young Algerians believe protests against the political status are more likely now, while only 14 per cent of young Saudis see the likelihood of protests.

Young Emiratis (100 per cent) rule out protests as a result of the impact of COVID-19, a reflection of the decisive measures the nation took to address the pandemic.

Those who said protests were likely prioritised the following reasons: economic reasons (71 per cent), lack of jobs (65 per cent), government policy (60 per cent) and access to healthcare (54 per cent). Food shortages (43 per cent), lockdown measures (38 per cent) and travel restrictions (23 per cent) were among other top reasons.

? Thinking about the impact of COVID-19, has it made protests against the political status quo more or less likely in your country?

(Showing % selecting 'Much more likely' / 'Somewhat more likely')



? And why do you think these types of protests are now more likely in your country? Please select all that apply.

((Showing % among those selecting 'Much more likely' / 'Somewhat more likely')

Top Reasons for Protests	
Rising prices	71%
Availability of jobs	65%
Government policy	60%
Access to healthcare	54%
Food shortages	43%
Lockdown measures	38%
Travel restrictions	23%



3

CORRUPTION

Tackling government corruption is a top priority for Arab youth; majority say corruption still present despite the pandemic

Cracking down on government corruption is the top-most priority for young Arabs, especially in the Levant and North Africa.

When asked their view on governmental corruption in their country, 77 per cent said it exists, with 41 per cent citing corruption in government as widespread and 36 per cent reporting it happens in some form.

The perception of corrupt governance is rampant across North Africa (95 per cent) and the Levant (98 per cent). In striking contrast, more than two-thirds (69 per cent) in GCC states believe there is no government corruption in their country.

Most young people in Yemen (88 per cent), Iraq (76 per cent), Tunisia (66 per cent) and Libya (63 per cent) agreed that 'there is widespread government corruption in my country'. But only a slender minority of young Arabs in GCC states – 1 per cent in the UAE, 2 per cent in Oman and 4 per cent in Kuwait – said government corruption is widespread in their country.

When asked to think of priorities for the Arab world in the next 10 years, young Arabs said tackling corruption must be the most important aspect for the Arab world to progress and move forward.

Ask to select three from 10 top priorities, 36 per cent said cracking down on corruption must be given utmost importance followed by creating new well-paying jobs (32 per cent) and defeating terrorist organisations (25 per cent).

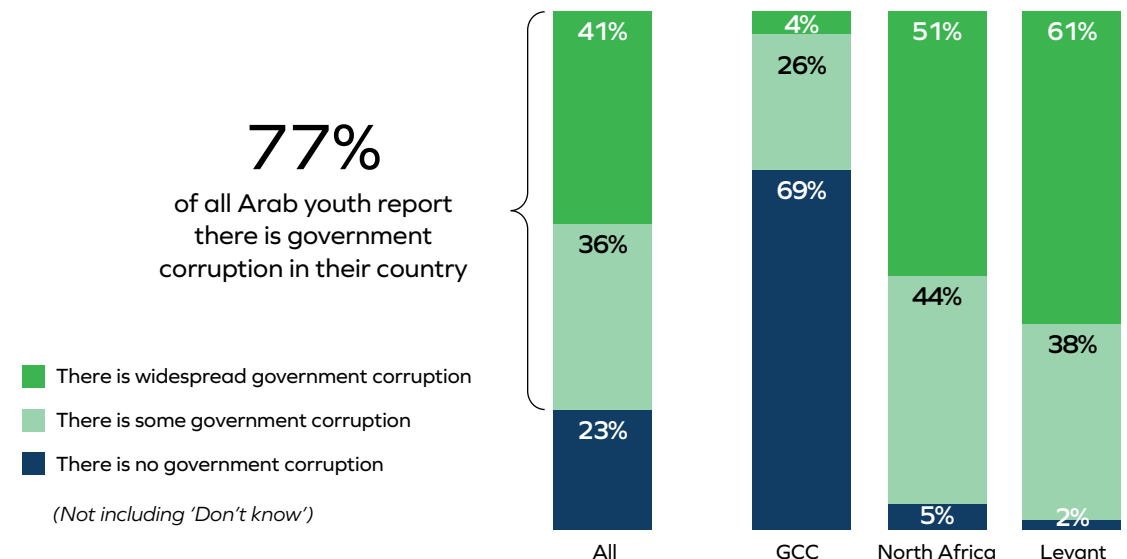
One in four (25 per cent) young Arabs said resolving the Palestinian-Israeli conflict must be a top consideration, while encouraging technological innovation was cited as a key driver of progress by more than one in five (22 per cent) young Arabs.

Modernising the education system, granting more personal freedoms to citizens, and economic diversification away from oil are also recommended by one in five (20 per cent) young Arabs as top priorities for policymakers, similar to their call for limiting the influence of Western powers in the region and making it easier to start a business (19 per cent each).



Youth in the Levant and North Africa say government corruption is widespread

? Which of the following is closer to your view about your government? In my country...

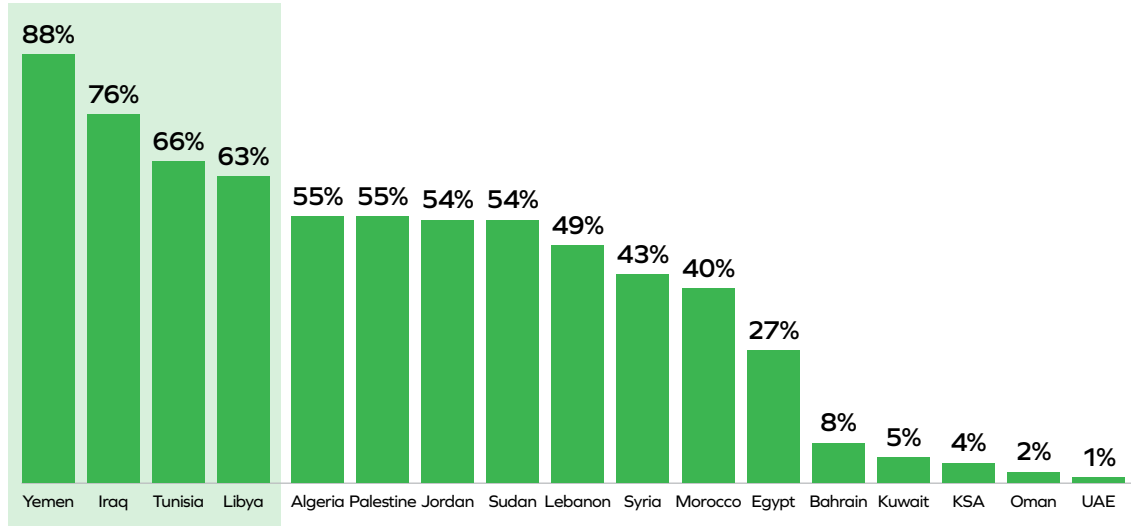




Youth in Yemen, Iraq, Tunisia and Libya are most likely to report widespread government corruption

? Which of the following is closer to your view about your government?
In my country...

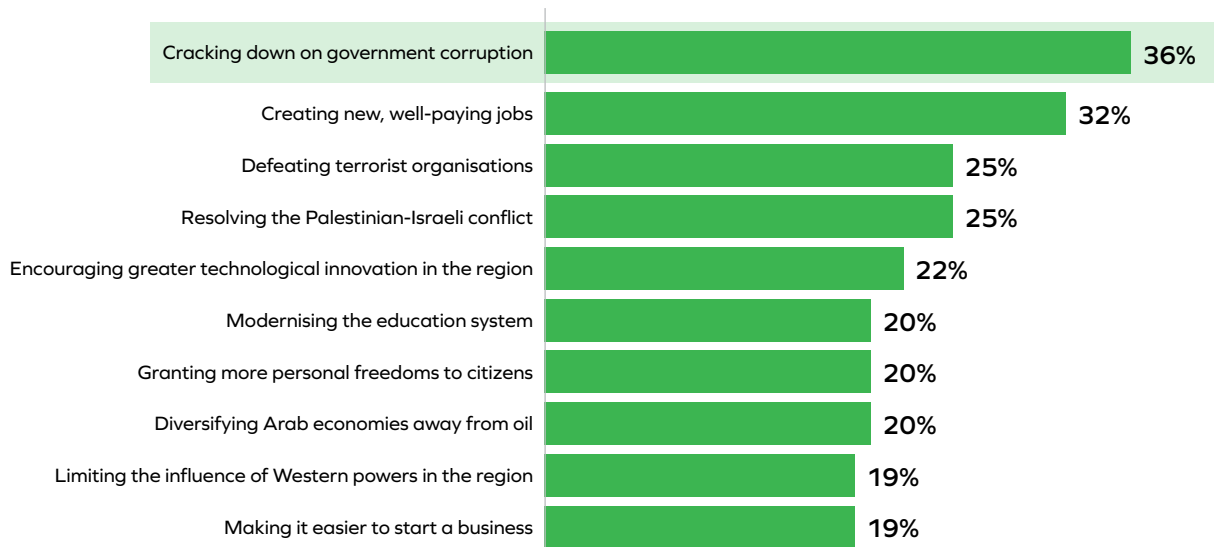
(Showing % selecting 'There is widespread government corruption in my country')



Arab youth view tackling government corruption as the top priority for the region to move forward

? Now thinking about the next 10 years, which of the following, if any, are the most important things necessary for the Arab world to progress and move forward? Please choose up to three priorities.

(Showing Top 10 priorities)





ARAB YOUTH COVID-19 Pulse Survey

Emirati and Saudi youth give strong marks to their governments on handling COVID-19

When asked how strongly they approve or disapprove of the way their government is handling the response to the COVID-19 outbreak, nearly 71 per cent said they 'approve'. However, there are regional differences in the response.

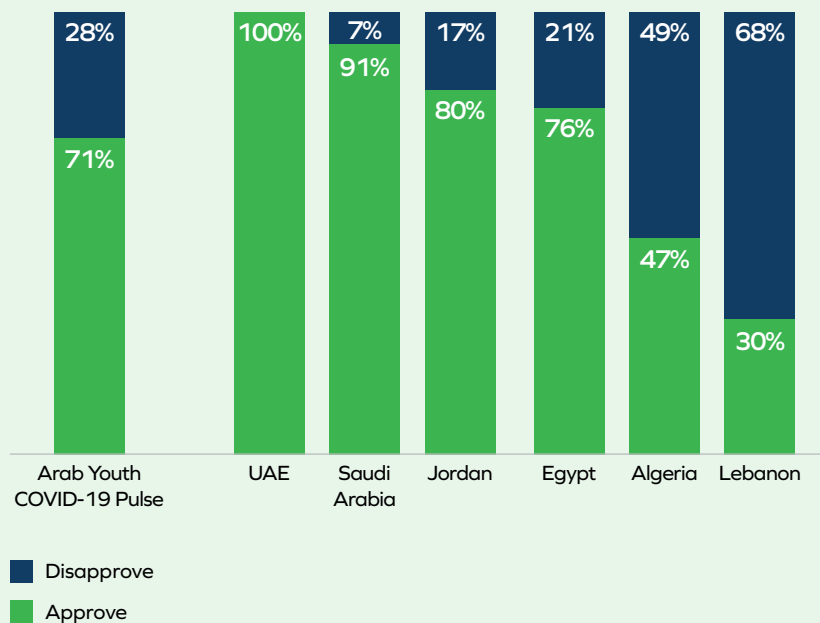
While 100 per cent of Emirati youth, and a majority of young Saudis, Jordanians and Egyptians approved of their governments' approach, over two-thirds (68 per cent) of young Lebanese disapprove their government's response. The split is even in Algeria, where 49 per cent disapprove of how their government has handled the crisis.

When asked about government corruption during COVID-19, 76 per cent of all surveyed said 'corruption is still present'.



How strongly do you approve or disapprove of the way your government is handling the response to the COVID-19 outbreak?

(Showing % among youth; not including 'Don't know')



76%

say government corruption is still present in their country in the midst of the pandemic

Listen to the voice of pragmatism



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. Molavi's writings over the years have appeared in the Financial Times, The New York Times, Foreign Policy, Bloomberg View, The Washington Post, Newsweek, Businessweek, Journal of Commerce, National Geographic and Institutional Investor, and he has been a regular guest on CNN, BBC, Al-Arabiya, Sky News Arabia and other channels. He is the founder and editor of the New Silk Road Monitor.

Shortly after the fall of the Soviet Union, the historian John Lukacs famously said, "the isms have all become wasms." I am reminded of this line as I reflect on the 12th Annual ASDA'A BCW Arab Youth Survey, a remarkable annual barometer of youth sentiments across a vital part of the world. For many young Arabs, it seems, the idea of an 'ism' - an all-encompassing ideology to solve their problems - seems almost as anachronistic as a landline telephone. Pragmatism, not ideological 'isms', rules the day among young Arabs, and in an era of pandemic-driven insecurity and political upheaval, this essential fact offers us hope for the region's future.

.....

Amid the tumultuous decade that the Arab world has just witnessed, the fact that so many young Arabs are simply demanding better governance, less corruption, more opportunity and revised education speaks volumes about their maturity.

.....

Consider the top two most serious challenges facing Arab youth, as the survey reveals: "cracking down on government corruption" and "creating new, well-paying jobs." These are highly pragmatic, justifiable concerns and a recurrent theme in twelve years of this survey. These are not the demands of revolutionaries. These are justifiable cries for greater opportunity, decent government and more dignified lives.

Among the other concerns as noted in the survey: defeating terrorist organisations, modernising education, diversifying economies away from oil and encouraging technological

innovation. Again, these are highly pragmatic concerns that bundle around 'quality of life' issues. These ideas are less Che Guevara revolutionary and more Silicon Valley technocratic. Amid the tumultuous decade that the Arab world has just witnessed, the fact that so many young Arabs are simply demanding better governance, less corruption, more opportunity and revised education speaks volumes about their maturity.

Less mature has been an Arab political class, particularly in North Africa and the Levant, that have failed their young populations time and again. Many of these leaders had been using the equivalent of landline telephones to solve the problems of a digital generation - or simply falling back on repression. The Arab uprisings knocked several of those leaders off their gilded 'throne', but the basic demands of that moment - again, for better jobs, decent governance, more opportunity - have been unfulfilled.

Lebanon today provides a good example of a venal political class unable and unwilling to deliver for their people. As Lebanon's economy spirals ever downward, drowning large swathes of its population in its wake, the basic question arises: how is it possible that a country with such enviable commercial geography, a highly skilled and educated populace, and a thriving diaspora could face such an economic meltdown? In a word: governance.

Lebanon's political elite have failed on just about every measure imaginable to deliver the conditions optimal for growth, opportunity, and dignity, while enriching themselves, fighting petty squabbles, and reinforcing sectarian divisions.

When young Arabs take to the streets, waving flags, to protest their government's failings, they are demonstrating a form of nationalism that is healthy and hopeful. It is not the nationalism of exclusion or the nationalisms of their parents' generation based on false utopias; rather, it is a nationalism of a people who care deeply about their country and are seeking to change it for the better.

Is it any wonder, then, that three out of four young Lebanese (77 per cent to be exact) are actively seeking to emigrate or have considered emigrating?

All who care about the future of the Middle East and the Arab world should lament the fate of Lebanon and her storied capital, Beirut. But dig deeper into the findings and there remains hope: yes, young Lebanese are eager to leave their country, but they also care deeply enough about their country to support the protests overwhelmingly (82 per cent) and see them leading to positive change (54 per cent).

While Lebanon provides an example of a political and economic meltdown in real time, other cases have been slower, but just as troubling. This leads us to the troubling finding that nearly half of young Arabs have considered leaving their country. While not as high as Lebanon, young people in other key countries are also seeking to actively migrate, according to the findings: Libya (69 per cent), Yemen (66 per cent), Iraq (65 per cent), Palestine (58 per cent) and Jordan (56 per cent), among others.

The Arab Youth Survey, now in its 12th year, has emerged as a remarkable chronicle of youth views in a world in flux. The COVID-19 pandemic has exposed some of the weaknesses and strengths in various countries and has accelerated some of the negative trends like unemployment. In fact, in the COVID Pulse Survey, young Arabs feel even more concerned about their future employment than they did before the pandemic – and unemployment has been a perennial top concern.

A few things, however, have remained constant, including the repeated and consistent cries for a better economic future. Another constant has been the view of the United Arab

Emirates among Arab youth. For the ninth year running, the UAE remains the top country to emulate and live in, according to the survey.

It's important to note that this question, posed to young Arabs, includes the entire world, not just the Arab world, and somehow the UAE beats out the US, Europe, Canada and other familiar lodestars. Dig deeper into the top three reasons why the UAE was chosen as the place young Arabs would most like to live in: "safe and secure" (44 per cent), "wide range of work opportunities" (36 per cent), "generous salary packages" (32 per cent). Once again, these are pragmatic concerns of a young population whipsawed by political insecurity, economic underperformance and scarce job opportunities. Looked at that way, it seems understandable that they would see a fellow Arab country, close to home, as preferable to a distant land in the West.

The historian John Lukacs who famously said that "all isms have become wasms" had one caveat: nationalism. That remained strong, he argued. When young Arabs take to the streets, waving flags, to protest their government's failings, they are demonstrating a form of nationalism that is healthy and hopeful. It is not the nationalism of exclusion or the nationalisms of their parents' generation based on false utopias; rather, it is a nationalism of a people who care deeply about their country and are seeking to change it for the better.

From the survey's findings, it seems that young Arabs are not in search of a new 'ism'. They simply want a decent government, a decent job, decent opportunities, and decent education. This is both hopeful for the region's future, and tragic that governments have failed so miserably to meet these pragmatic desires.



4

PERSONAL DEBT

The number of young Arabs in personal debt is rising and household debt has increased since the pandemic

Along with lack of job opportunities and the rising cost of living, more young Arabs say they are being saddled with personal debt with little means to clear them. More than one-third (35 per cent) of young Arabs say they are in debt now, a significant increase from earlier years.

From 15 per cent reporting they were in debt in 2015, the number of young people in debt has more than doubled in just five years to 35 per cent. In 2016, the number of young Arabs who admitted to being in debt had temporarily dipped to 12 per cent only to rise to 20 per cent in 2017, fall marginally to 18 per cent in 2018, and grow again to 21 per cent in 2019.

Personal debt is most common among youth in Syria (73 per cent), Jordan (70 per cent), Palestinian Territories (65 per cent) and Iraq (59 per cent) compared to their counterparts in Saudi Arabia, the UAE and Oman (at 14 per cent each) and only 4 per cent of young Kuwaitis stating they are in debt.

The reason for young Arabs being in debt varies across the region. While in the GCC states, young people said their debts are largely due to car loans, in the Levant and North Africa, the most cited reason was student loans.

Among those currently in debt, student loans are the main reason for debt among one in four (26 per cent) young Arabs followed by car loans cited by one in five (20 per cent). Medical bills (12 per cent), home mortgage (10 per cent), loans for marriage (9 per cent) and excessive shopping (7 per cent) are the other reasons cited by young Arabs for their personal debt.

Compared to their counterparts in the GCC region, many young Arabs in the Levant and North Africa are struggling financially. While 60 per cent of young people in the GCC said their financial situation is excellent, the situation reverses in the Levant where 57 per cent described their financial situation as 'pretty bad' as did one in three (31 per cent) young Arabs in North Africa.

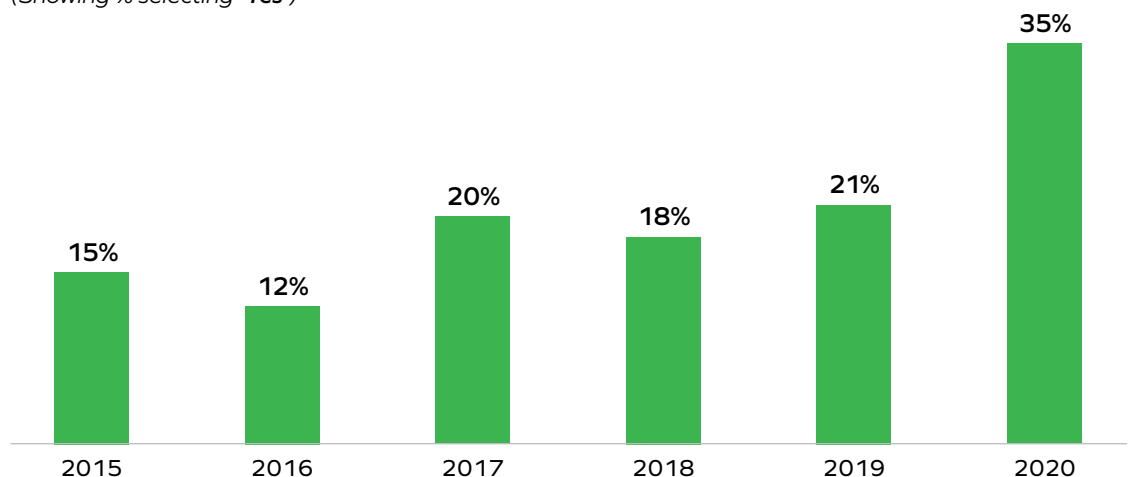
In all, more than one-third (34 per cent) of young Arabs report a 'pretty bad/poor' financial situation and a similar number describe their financial situation as 'average'.



Over a third of Arab youth say they are in personal debt, a significant jump from previous years

? Are you currently in debt?

(Showing % selecting 'Yes')

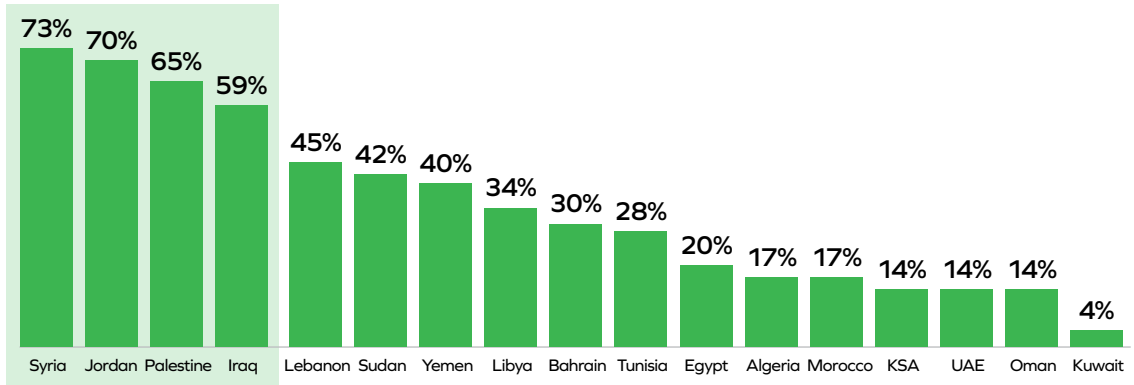




Personal debt is most common among youth in Syria, Jordan, Palestine and Iraq

? Are you currently in debt?

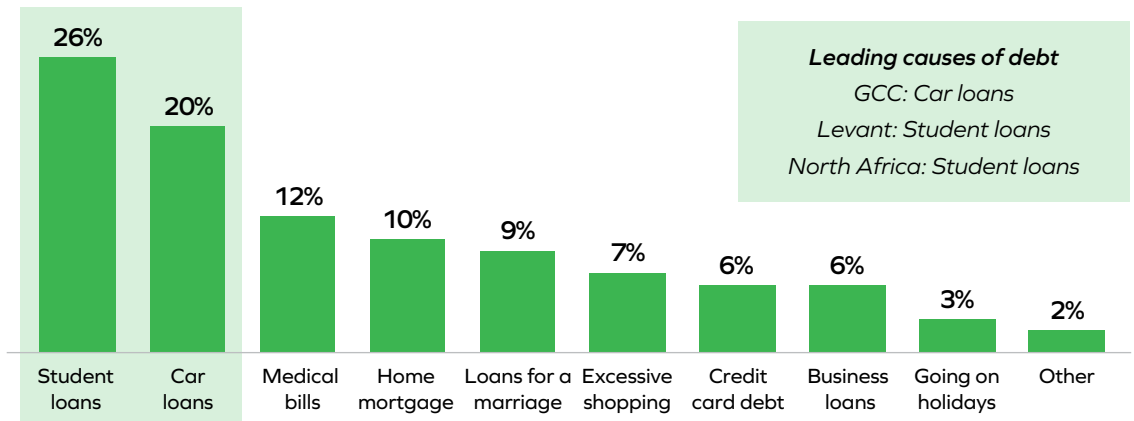
(Showing % selecting 'Yes')



Student and car loans are the main causes of personal debt

? What is the main reason for your debt?

(Showing % among those currently in debt)



Many young Arabs in the Levant are struggling financially

? How would you describe your current personal financial situation?





ARAB YOUTH
**COVID-19
Pulse Survey**

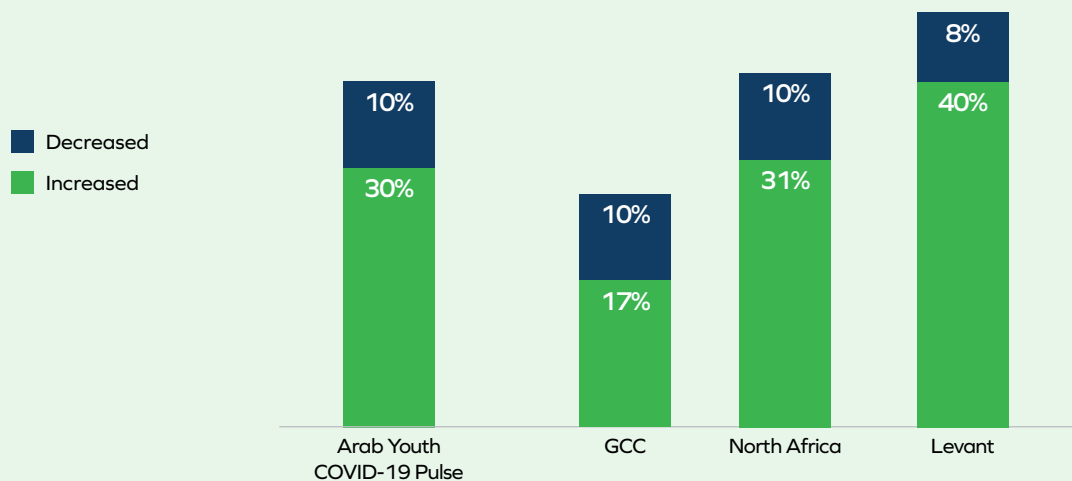
One-third of young Arabs say their household debt has increased since the pandemic

The financial burden that COVID-19 has placed on families in the Arab world is evident in nearly one-third of young Arabs stating their household debt level has increased since the start of the pandemic. Only 10 per cent reported that their household debt level has decreased.

The increase is more pronounced in the Levant and North Africa, where 40 per cent and 31 per cent of young Arabs cited higher household debts compared to only 17 per cent in the GCC.

? Since the start of the COVID-19 outbreak, has your household's level of debt...?

(Showing % among youth; not including 'Don't know' / 'Stayed the same' / 'My household doesn't have any debt')





5

J O B S

Unemployment is a top issue and young Arabs are looking beyond traditional jobs; COVID-19 has made finding a job more difficult

Rising unemployment across the Arab world has been a top concern reported by its young people over successive years of the Arab Youth Survey. This year, while 87 per cent of young Arabs expressed concern about lack of jobs, only half (51 per cent) have confidence that their governments can resolve the issue.

Youth unemployment figures in the Middle East and North Africa are highest in the world, according to the World Economic Forum, at 27.2 per cent in the Middle East and 29 per cent in North Africa – which is more than double the global average.

The International Monetary Fund reports that 5.5 million new workers are joining the region's labour force every year, but the number of jobs created are hardly proportionate and the gap is widening. The situation has been further compounded with the COVID-19 outbreak with job losses and business closures severely impacting the labour market.

Despite waning confidence in their governments to create jobs, many young Arabs still prefer to work in the public sector. When asked where they are likely to work, 43 per cent cited 'government' although this number has declined from 49 per cent in 2019.

There has been a drop in preference for working in the private sector too with only 24 per cent stating the private sector as their preferred place of work in 2020 compared to 28 per cent in 2019.

The decline in interest for government or private sector jobs among young Arabs is a gain for entrepreneurship as more young Arabs – nearly one in four (23 per cent) say they prefer to work for themselves or their family, a 7 percentage point growth over 2019. More young people in the region also want to serve non-government organisations with 9 per cent preferring to work with NGOs in 2020 compared to 6 per cent in 2019.

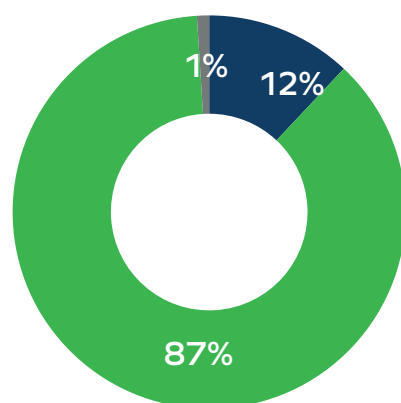
The entrepreneurial mindset is stronger in the GCC region, where oil-rich governments concerned about unemployment and focused on economic diversification, are encouraging their citizens to establish their own businesses, and are supporting start-ups and small and medium enterprises with state-funding.

While 40 per cent of all young Arabs want to start their own business in the next five years, the spirit of entrepreneurship is highest among young people in GCC at 55 per cent, followed by those in North Africa (44 per cent) and the Levant (22 per cent).



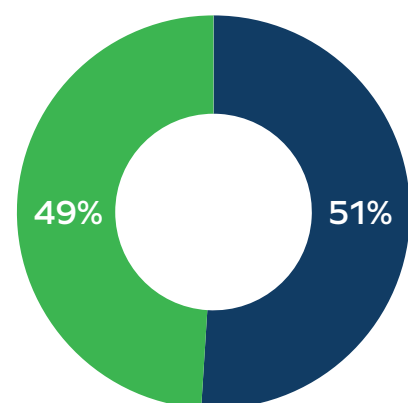
Most are concerned about unemployment but only half have confidence in their government on the issue

? How concerned would you say you are about unemployment?



■ Not concerned
 ■ Concerned
 ■ Don't know

? How confident are you in your national government's ability to deal with unemployment?

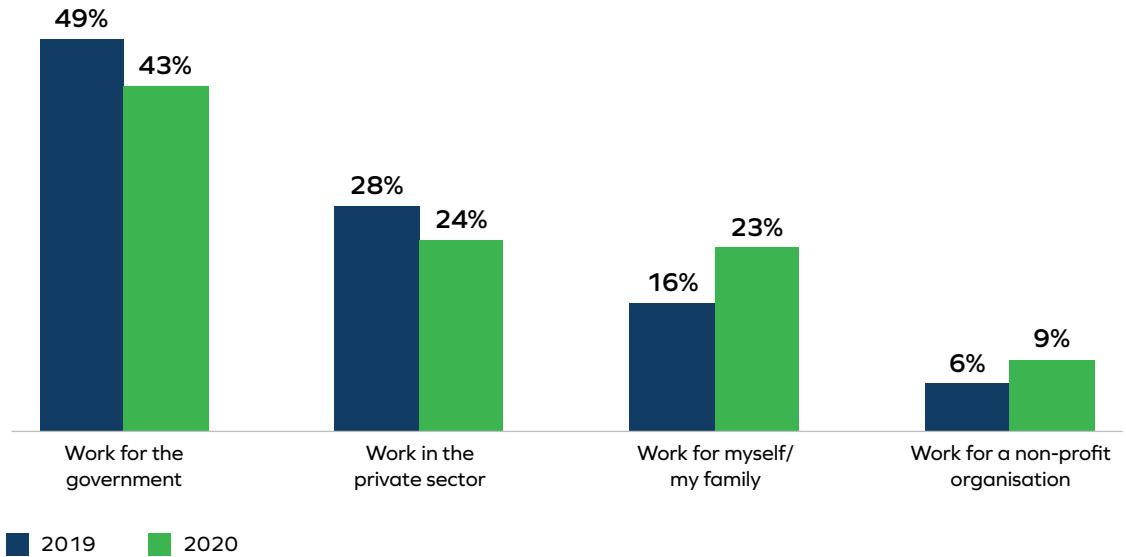


■ Confident
 ■ Not confident



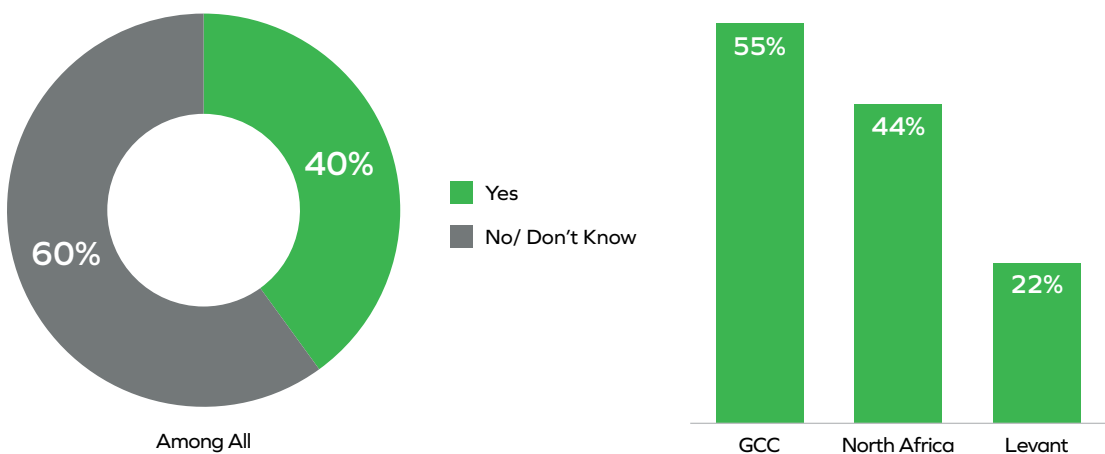
More young Arabs are looking beyond traditional government and private sector jobs

? Thinking about your future career, would you prefer to...



Many young Arabs, particularly in the GCC, could also pursue entrepreneurship

? Do you intend to start your own business within the next five years?





ARAB YOUTH
**COVID-19
Pulse Survey**

Arab youth are finding it more difficult to find a job due to COVID-19

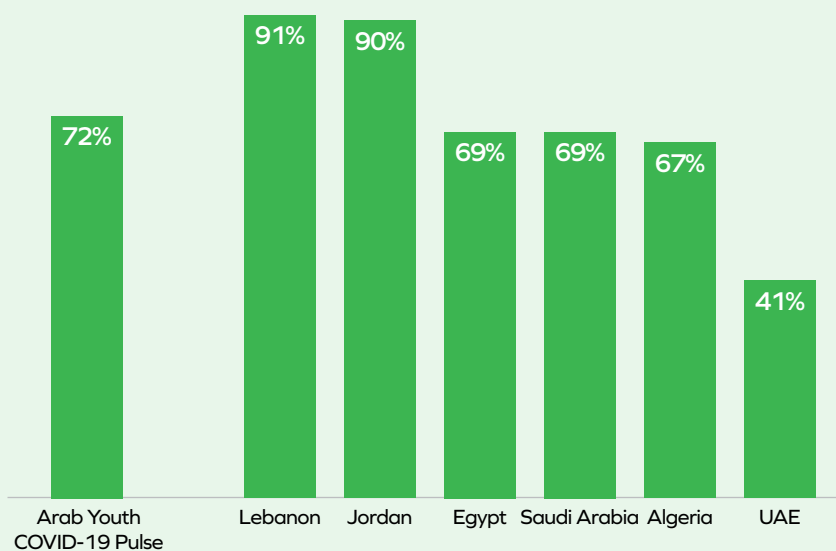
Young Arabs are more concerned about lack of jobs following the COVID-19 outbreak. When asked about finding a new job currently compared to pre-COVID-19, 72 per cent – nearly three-quarters – said it is a ‘little more difficult’ or ‘much more difficult’ now.

Uncertainty regarding finding jobs is greatest among Lebanese and Jordanian youth where nine in ten said finding a job is more difficult now. Over two-thirds in Egypt, Saudi Arabia and Algeria also share the same perception. In the UAE, only 41 per cent said finding a new job is more difficult now than before the coronavirus outbreak.

The region has also been hit hard by job losses as one in five young Arabs (20 per cent) said they or someone in their family has lost their job due to COVID-19.

? When compared to before the COVID-19 outbreak, would you say that finding a new job is currently...

(Showing % selecting ‘A little more difficult’/ ‘Much more difficult’)



20%
of young Arabs say they or someone in their family has lost their job due to COVID-19

COVID-19 accelerates need for a new social contract



Dr. Jihad Azour

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

At the time of the 2019 release of the ASDA'A BCW Arab Youth Survey, I argued for a new social contract where the state would create an environment for the youth to thrive and drive prosperity for decades to come. Since then, the world and the Arab region have been struck by the COVID-19 pandemic, and its economic and social costs continue to mount. And yet, this crisis makes the call for a new social contract even more relevant.

The findings of the 2020 ASDA'A BCW Arab Youth Survey provide a fresh glimpse at youth concerns and aspirations at the onset of the COVID-19 pandemic. Young Arabs started this decade longing for change to build a shared prosperity and a better future. The survey shows that, in search of economic and educational opportunities, nearly half of them had considered leaving their countries; 40 per cent of them would like to do so permanently. At the same time, youth in countries that had seen major public protests recently were confident that these protests would bring about positive change. They want to see improved governance and reduced corruption, which they believe to be the main impediments to progress.

Unsurprisingly, unemployment remained a top concern. And there was evidence that more youths were holding debt, with the pandemic aggravating potential financial hardship. These concerns have doubtlessly been exacerbated by the COVID-19 crisis. On a more positive note, young Arabs were starting to look for opportunities beyond traditional jobs: seeking to create their own enterprises, lowering their expectations about public sector jobs, and embracing the digital revolution. Young men and women were also supporting and reporting greater gender equality in access to education and the labour market. These developments bode well for the future.

While the expectations of Arab youth remain high, the COVID-19 pandemic brings unprecedented uncertainty. Lockdowns have led to massive job losses and rising inequality. We are seeing a rapid deceleration in economic activity. For nearly all countries, the recession is deeper than the ones following the global financial crisis in 2008 and the oil price shock of 2015. The downturn is also expected to exacerbate the already large humanitarian and refugee challenges faced by fragile and conflict-affected countries. Many youth face the prospect of joining labour markets at a time of a deep economic recession and pervasive uncertainty; those already employed stand at a higher risk of losing their jobs because of their relatively lower skills and experience; those in school confront practical difficulties in accessing education; and international opportunities are shrinking as countries have closed their borders to tourists, students and migrants alike. At this time of crisis, women have been called upon to find work to bring additional income to their households and to take additional family responsibilities.

The downturn is also expected to exacerbate the already large humanitarian and refugee challenges faced by fragile and conflict-affected countries. Many youth face the prospect of joining labour markets at a time of a deep economic recession and pervasive uncertainty.

Immediate focus should remain on controlling the pandemic and limiting its impact on the economy. While young people have been relatively shielded from the health effects of the pandemic, the economic crisis could have a long-lasting effect on their jobs and earning prospects.

Let us act together on building stronger economies and prosperity. Despite these being compounded by the pandemic, the youth hold the key to the recovery and to rising prosperity for all. They are the strength of the region and fulfilling their hope and aspirations can only lead to a better future.

To cushion the shock, governments in the region have taken actions to support adequate social safety nets, protecting households and the most vulnerable, and providing temporary and targeted tax relief, subsidies, and transfers to business to keep them afloat while trying to control the pandemic. Additional measures could focus on developing specific programmes geared toward preserving employment linkages, providing training to facilitate telework, supporting the reallocation of human resources, and expanding support for small businesses and startups - a major source of employment for youth.

Priorities and Opportunities

Looking ahead, it will be crucial to limit the scarring effects of the pandemic and support a sustainable reopening of the economy. The COVID-19 pandemic could prove to be a decisive turning point in building systematic resilience to shocks. Arab countries must aspire to build more equitable, greener and more sustainable economies.

The pandemic invites us to rethink the way the recovery should be engineered. To succeed in this endeavour, countries need to put the youth agenda centre stage and focus on a few key priorities (i) preventing the sharp increase in inequality provoked by the crisis; (ii) supporting a resilient recovery; and (iii) harnessing the digital transformation. To achieve these goals, four key policy areas - that can rely on the region's large population of well-educated and tech-savvy youth - are crucial:

Investing in people and nurturing their talent: Governments will need to adopt social spending policies that address new demands on health, education and social protection. The goal would be to create a system that is responsive to a more flexible labour market.

Accelerating the adoption and use of new technologies: This crisis has shown how technologies can be better leveraged, for

example by permitting people to work remotely and improve their access to markets. Countries therefore need to reinforce digital links and harness new technologies. Opportunities are many, ranging from delivering more online services and reducing red-tape through e-government, to changing the approach to learning - whereby the region could become a hub for higher education at a time when travel has become difficult - or in making schools and hospitals benefit from new technologies. The crisis has scaled up global digital connections that kept some economies running. The tech-savvy young Arabs can be the anchor countries need to better integrate into the new global economic order through digitalisation and new technologies.

Strengthening governance: The pandemic has shown that trust between citizens and states greatly facilitates effective policy implementation. Trust can be strengthened further by improving governance and tackling corruption. In this regard, greater transparency and accountability and less red tape can reduce opportunities for corruption.

Providing opportunities for all: Governments should strive to preserve and expand the gains that had been achieved before the crisis. Building on growing perceptions of gender equality and the benefits of female participation in the labour force, well-designed policies can mitigate the negative effects of the crisis on women and prevent setbacks for gender equality. Creating opportunities for women and youth is ultimately good for addressing income inequality, economic growth and resilience.

Let us act together on building stronger economies and prosperity. Despite these being compounded by the pandemic, the youth hold the key to the recovery and to rising prosperity for all. They are the strength of the region and fulfilling their hope and aspirations can only lead to a better future.



6

IDENTITY

Religion is central to the personal identity of young Arabs, more so than family or nationality

In 2019, the top finding of the ASDA'A BCW Arab Youth Survey was that 66 per cent of young Arabs viewed religion as playing too big a role in the Middle East compared to just 21 per cent in 2015. However, the 2020 Arab Youth Survey identifies that many young Arabs view religion as central to their personal identity.

When asked what was most important to their personal identity, 40 per cent cited religion over 'my family/tribe' (19 per cent), 'my nationality' (17 per cent), 'my Arabic heritage' and 'my political beliefs' (7 per cent each) and 'my language' and 'my gender' (5 per cent each).

Religion is particularly important to personal identity among young Arabs in North Africa compared to the Levant and countries in the GCC. While 61 per cent of young Arabs in North Africa said they see religion as a defining aspect of their personal identity, only 29 per cent in the Levant and 27 per cent in the GCC states do so.

In North Africa, most young people in Algeria (72 per cent), Sudan (70 per cent) and Egypt (69 per

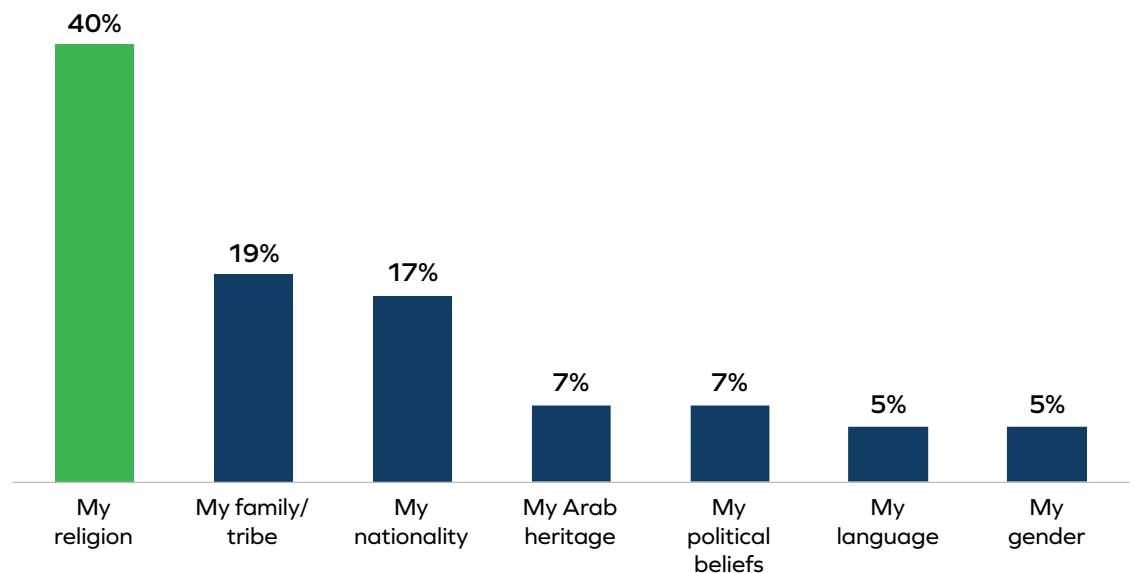
cent) said religion is most important to their personal identity, a view shared by 60 per cent of young Saudis. Though one in three young people in Bahrain (32 per cent), Lebanon and Libya (30 per cent each) share the view, only 8 per cent of young Emiratis, 10 per cent of young Yemenis and 12 per cent of young Omanis see religion as most important to their personal identity.

Many young Arabs said religion plays too big a role – a perception that has strengthened over the past five years. In 2015, half (50 per cent) of those surveyed said they thought religion played a prominent role in the Middle East rising to 66 per cent in 2019 and 67 per cent now. Many young Arabs (66 per cent) strongly agreed to the statement that the Arab world needs to reform its religious institutions – a drop from 79 per cent in 2019 - while 21 per cent disagreed – an increase from 12 per cent in 2019.



Many young Arabs view religion as central to their identity, more so than family or nationality

? Which of the following is the most important to your personal identity?

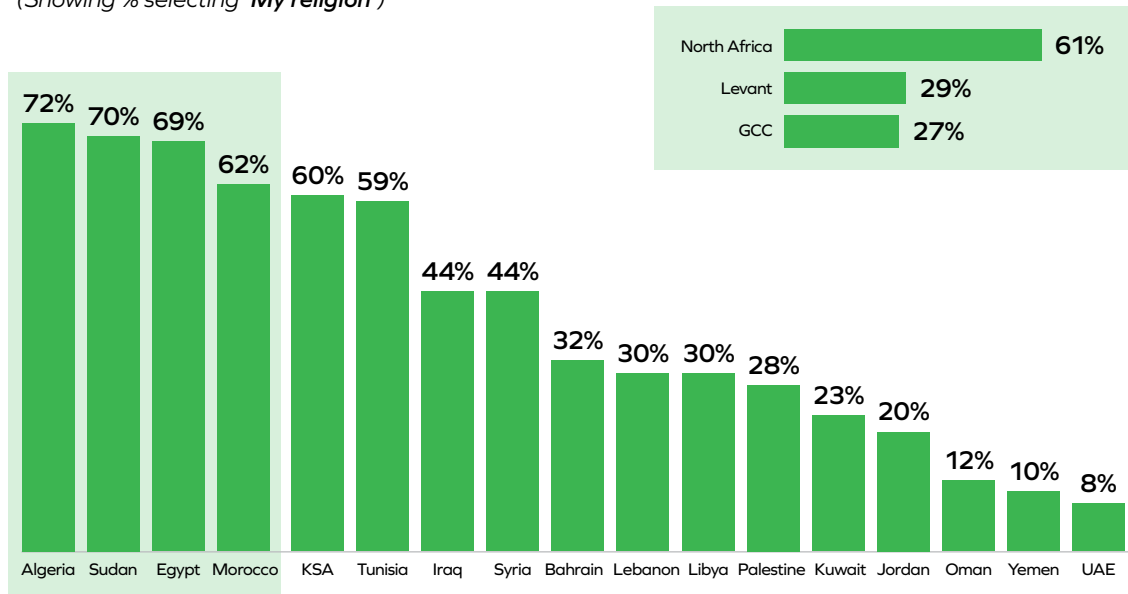




Religion is particularly important to personal identity among Arab youth living in North Africa

? Which of the following is the most important to your personal identity?

(Showing % selecting 'My religion')

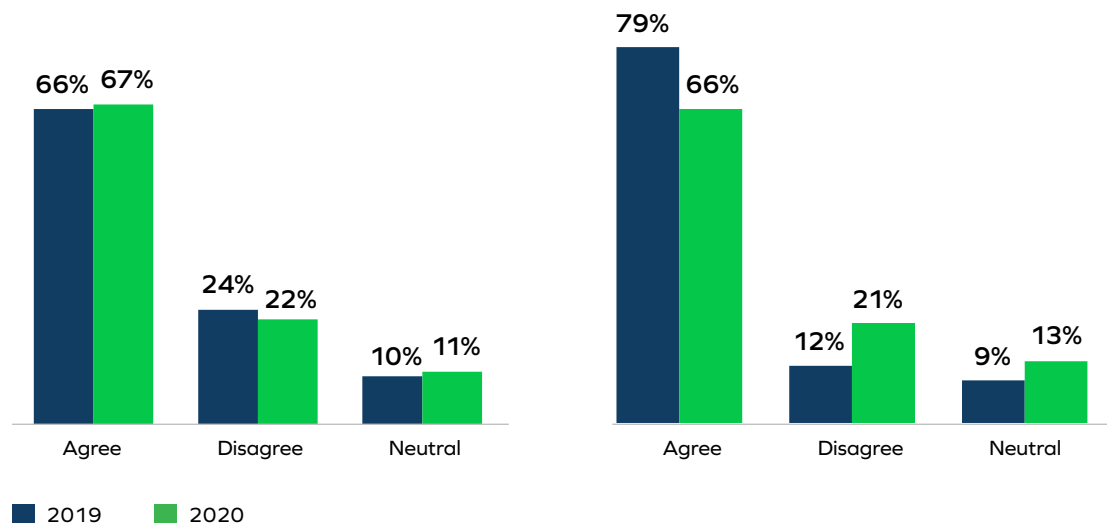


Nevertheless, many still say religion plays too big a role and that religious institutions need reforming

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

"Religion plays too big a role in the Middle East"

"The Arab world needs to reform its religious institutions"





ARAB YOUTH COVID-19 Pulse Survey

Religion continues to be important to the personal identity of Arab youth

When asked following the outbreak of COVID-19 their views on personal identity and religion, 41 per cent of young Arabs said religion remains central to their identity.

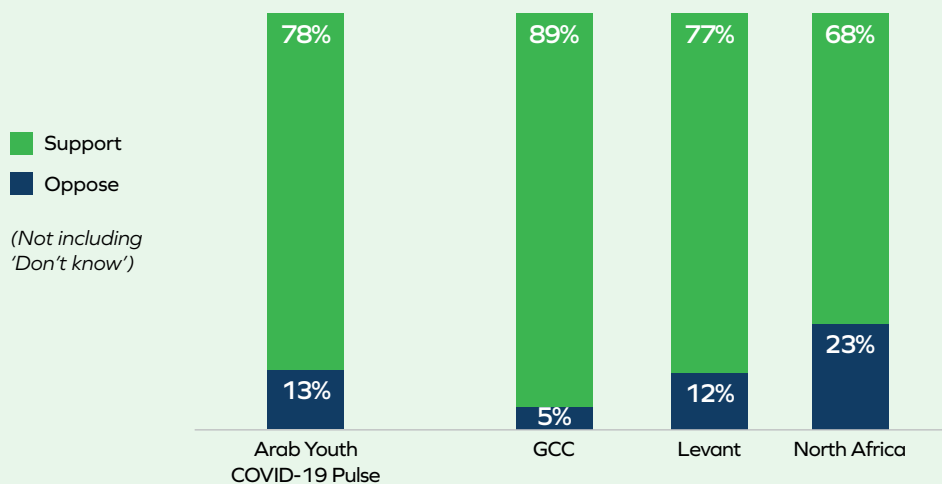
Concerning the restrictions put on Hajj due to the COVID-19 situation, a good majority (78 per cent) supported the decision - more so in the GCC where 89 per cent supported it compared to 77 per cent in the Levant and 68 per cent in North Africa.



Majority support restrictions on Hajj to prevent spread of COVID-19

41% of Arab youth say their religion remains central to their identity

? Do you support or oppose the restrictions put on the Hajj to limit the spread of COVID-19?



Arab youth view religion as important but feel alienated from its current form



Eman Alhussein

Eman Alhussein is a Non-Resident Fellow at the Arab Gulf States Institute in Washington DC. She was previously a Visiting Fellow at the European Council on Foreign Relations and a Research Fellow at King Faisal Center for Research and Islamic Studies in Riyadh, Saudi Arabia. Alhussein's research focuses on Saudi Arabia and the Gulf region. Her areas of interest include identity and nationalism, gender, cultural and societal change, and religious discourse and reforms. She holds an MA in Gulf Studies from the Institute of Arab and Islamic Studies at the University of Exeter.

Unemployment and the economy are usually considered the two most pressing issues for many Arab youth, but this is only half the truth. The findings of the 2020 ASDA'A BCW Arab Youth Survey, similar to last year, have shown that religion remains a crucial characteristic of Arab identity, even among the younger generation. The findings also show the youth's view of religious institutions and their need for reform since they do not keep up with the changing world we live in.

Arab cultural heritage is at times heavily influenced by traditional interpretation of religion. This presents a conflict to the youth whose modern lifestyle is often at odds with their culture, making their lives riddled with inconsistencies, which can further stir feelings of guilt and anxiety.

Arab youth have to navigate through the different layers that make up their identities from religion, tribalism and family, nationality, heritage and language. The findings show that religion remains the most important component of personal identity for 40 per cent of Arab youth followed by family/tribe (19 per cent) and nationality (17 per cent). The strong affiliation with religion is most prevalent in North African countries (61 per cent) and least so in the GCC (27 per cent). Despite the importance of religion to Arab youth, a vast majority of them also consider religion too influential in the region. When asked if "religion plays too big a role in the

Middle East" 67 per cent of those surveyed agreed, the highest ever over the past few years.

These numbers do not reveal conflicting views regarding religion but demonstrates the dilemmas facing Arab youth. The perception of religion in Arab societies has been affected by different regional and domestic events. The rise of radical movements in the region as well as political Islam following the Arab uprisings have all been part of the recent history that still impacts Arab youth. Moreover, the way some Arab countries consume religion in the political discourse, which is further amplified on social media, is no longer deceptive to the youth who can now see through it. On the other hand, rising nationalism in some parts of the Arab world has also played a role in shifting and redefining what constitutes one's identity. All of these developments, which have unfolded this past decade, continue to play a role in the youth's perception of religion and how it affects their identity.

The predicament facing Arab youth regarding religion is further complicated by the orthodox approach followed by religious institutions in the region. Last year, 79 per cent of the youth expressed the need to reform religious institutions whereas 66 per cent have shared similar views in this year's survey. The current interpretation of religion and the way it influences the legislative system in many Arab countries can depict an outdated reality. This is particularly so when it touches the private sphere through the personal status law, especially on issues concerning women. Moreover, Arab cultural heritage is at times heavily influenced by traditional interpretation of religion. This presents a conflict to the youth whose modern lifestyle is often at odds with their culture, making their lives riddled with inconsistencies, which can further stir feelings of guilt and anxiety.

The need to address the concerns of the youth, especially regarding the role of religion pertaining to their identity, is of dire importance. Better equipped religious institutions need to relieve the youth from the burden of navigating religious issues by themselves, which might create more confusion than answers.

The youth have also witnessed how religious figures, who still remain influential in many Arab societies, can sometimes give in to change even if they have resisted it initially. This not only feeds into Arab youth's scepticism towards religious institutions but also further highlights the inconsistency of the religious discourse and its inability to provide timely explanation or justifications to the changing reality of today. The habit of initial rejection and prohibition followed by acceptance and adaptation is not a source of confusion anymore but a demonstration of the institutions' inability to deal with change. This has increasingly built-up a lack of trust in religious institutions, which strengthen an individualistic approach towards understanding religion away from the influence of its institutions.

In some Arab countries, attempts have been made over the past years to inhibit and prevent radicalisation. These efforts have been perceived as crucial due to the rise of radical movements in the region and the subsequent wave of terrorist attacks that hit Western and Arab cities. Much of the reforms of the religious discourse and its institutions have either focused on deradicalisation or mending bridges with the West. But the need remains to target those who are neither radicals nor Western; the normal Arab youth who still view religion as important but feel alienated from it in its current form.

The need to address the concerns of the youth, especially regarding the role of religion pertaining to their identity, is of dire importance. Better equipped religious institutions need to relieve the youth from the burden of navigating religious issues by themselves, which might create more confusion than answers.

Absorbing and accepting the changes of today can restore the youth's confidence in religious institutions during challenging times. For example, the decision to impose restrictions on this year's Hajj was supported by 78 per cent of those interviewed in the COVID-19 Pulse Survey. This demonstrates that despite the importance of religion for the youth, they still approved of measures that were initially subject to some debate. In addition, enriching the religious discourse should not be limited to traditional outlets but should also include school curricula and cultural events that can provide the youth with food for thought, not room for doubt.

In these challenging times, the youth are witnessing a rapidly changing regional order and their lives are impacted by an uncertain economic situation. Providing the youth with some level of comfort is perhaps more needed now than ever before. Attempts to create more jobs and provide a better economy for the youth is crucial, but this does not mean overlooking issues that affect their sense of identity and religion. Efforts to address these issues will be a crucial milestone that has not yet been achieved, nor has been more needed now than ever before.

Maybe the youth do not talk much about religion, but it is certainly on their minds.



7

GENDER RIGHTS

Most young Arab women say they have the same rights as men, but their work and family responsibilities are increasing since COVID-19

In a region that has typically been stereotyped for gender discrimination, this year's survey throws new light on how young Arabs perceive equality of the sexes.

Asked specifically to young Arab women whether men and women have same rights or men have more rights, nearly two in three young Arab women (64 per cent) said they have the same rights as men, compared to 25 per cent citing men as having more rights and 11 per cent stating women have more rights than men in the Arab world.

More young Arab women in the GCC (71 per cent) affirmed gender parity than in North Africa (62 per cent) and in the Levant (60 per cent), a reflection of the continued efforts of Arabian Gulf governments to empower women through wider representation in government ministries and corporate boards.

When asked about ease of access to a good education, 70 per cent of young Arab women said there was equality in accessing quality education; only 19 per cent said boys have an advantage.

However, when it comes to professional opportunities, although a majority (52 per cent) of young Arab women cited equal opportunities, more than one-third (35 per cent) said men have better professional opportunities than women.

Young Arab women and men tend to agree that a woman can benefit her family most if she pursues career opportunities. When asked whether a woman can benefit her family if she works, 76 per cent of young Arab women agreed, although more favoured women working part-time (46 per cent) than full-time (30 per cent).

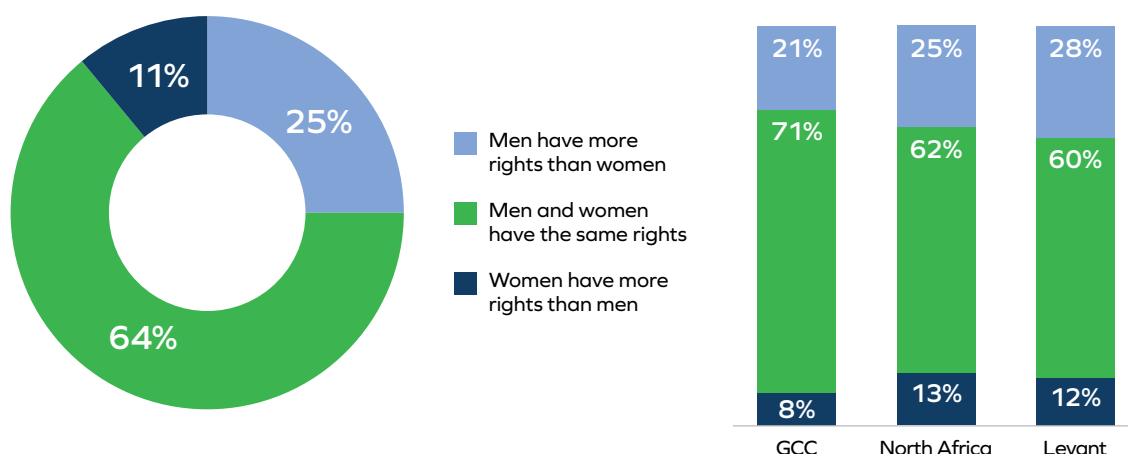
Among young Arab men, 70 per cent shared the view that women working will benefit the family. They also echoed the views of their counterparts with a larger proportion of young male Arabs (43 per cent) favouring part-time work by women than full-time (27 per cent). More young male Arabs – nearly one in three (30 per cent) – stated that women staying at home full-time is more beneficial to the family compared to 24 per cent of young female Arabs.



Nearly two in three young Arab women say they have the same rights as men in their country

? Which of the following is closer to your opinion? In my country...

(Among women)





Majority of women also say they have the same access to education and employment opportunities

Which of the following is closer to your opinion? In my country getting quality education...

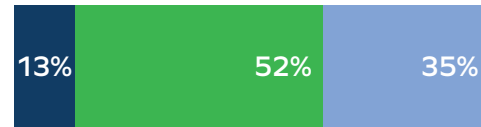
(Among women)



- Is easier for girls than boys
- Is the same for boys and girls
- Is easier for boys than girls

Which of the following is closer to your opinion? In my country...

(Among women)



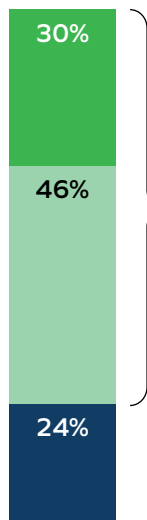
- Women have better professional opportunities than men
- Men and women have the same professional opportunities
- Men have better professional opportunities than women



Young Arab women and men agree that a woman can benefit her family most if she works

Which of the following is closer to your opinion? A woman can benefit her family most if she...

Among Women



76%
say a woman can benefit her family most if she works

Among Men



70%
say a woman can benefit her family most if she works

- Works full-time
- Works part-time
- Stays at home full-time



ARAB YOUTH COVID-19 Pulse Survey

Arab youth believe work and family responsibilities are increasing for women

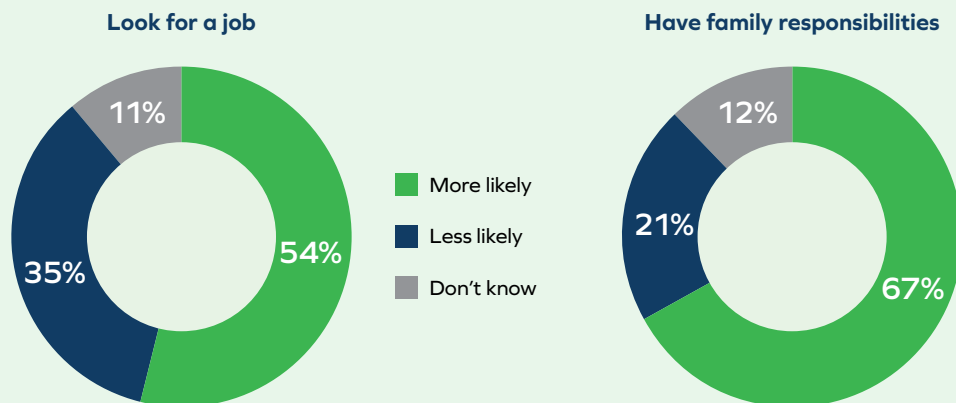
Following COVID-19, young Arabs say the work and family responsibilities of women are increasing. More than half (54 per cent) said women are more likely to look for a job and 67 per cent said women are more likely to have family responsibilities.

Over one-third of young Arabs (35 per cent) said women are less likely to look for a job and just about one in five said women have less family responsibility since the onset of the pandemic.



In your opinion, since the onset of the pandemic, are women more or less likely to...

(Showing % of youth, both men and women)



More efforts needed to help women secure greater rights



Mina Al-Oraibi

Mina Al-Oraibi is the Editor-in-Chief of The National, a regional news outlet based in Abu Dhabi. An Iraqi-British journalist, Al-Oraibi has more than 18 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, Al-Oraibi 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, Al-Oraibi was a Yale World Fellow and she is a trustee of the American University in Iraq – Sulaimani. She was named as a Young Global Leader by the World Economic Forum and is a member of the International Media Council.

In this year's ASDA'A BCW Arab Youth Survey, most women interviewed said they had the same rights as men in their country. Of the 1,700 women respondents in the Main Survey, 64 per cent said that they have the same rights as men. In the Gulf Cooperation Council, that figure is at 71 per cent, while in North Africa that figure is 62 per cent and in the Levant, it rests at 60 per cent. Strikingly, 11 per cent of women believed that they had more rights than men, while 25 per cent said men have more rights than women in their respective countries. Among the 3,400 of 18-24-year-olds interviewed across 17 Arab countries in the Main Survey, there was a general sense of optimism on gender rights.

The World Economic Forum predicts it will take 150 years to close the gender gap in the Middle East and North Africa if the current rate of progress continues.

The results of the survey are compelling. However, there are still major challenges to be met, including how rights are exercised, and whether they are available to women from all sections of society. The influence of cultural norms and social expectations cannot be overlooked in how women fare in their societies.

This past year witnessed significant steps taken to secure women's rights in a number of countries. There has been a rise in Arab women voicing their concerns about instances of harassment, in part reacting to the global #MeToo movement.

This was most pronounced in Egypt, where hundreds of women have spoken publicly about cases of harassment and some of these have been tackled in the courts. Furthermore, a bill was passed this August in Cairo that granted women anonymity in sexual abuse cases, protecting more women to tackle subjects often considered taboos not to be discussed. This was also an important year for women's rights in Sudan, where the transitional government has been moving towards tackling injustices women face. For example, on May 1, 2020, Khartoum criminalised female genital mutilation. While the practice continues in too many areas of Sudan, the state is now clear in outlawing it. These are among the steps that can help to build more rights and protections for girls and women in the region.

According to the World Economic Forum's Gender Gap Index Report for 2020, the Middle East and North Africa region ranks the lowest in the world, with 61.1 per cent on overall performance when it comes to closing the gap between men and women. However, interestingly, the region ranks among the highest on educational attainment at 95 per cent, and 97 per cent for health and survival. It is in economic participation, at 42 per cent, and political empowerment, 10 per cent, that the region fares badly. The World Economic Forum predicts it will take 150 years to close the gender gap in the Middle East and North Africa if the current rate of progress continues.

The discrepancy between educational gains and participation in the workforce is a salient point to note. According to this year's Arab Youth Survey, 70 per cent of women believe that boys and girls have the same opportunity at getting a quality education, with only 19 per cent believing it is easier for boys to get a quality education, while 11 per cent believe it is easier for girls. However, when it comes to professional opportunities, only 52 per cent believe that men and women have the same

The coming years will require public and private sector support for women to recover from the impact of COVID-19. Efforts will be needed to ensure that this does not lead to a loss of achievements attained but rather to build in practices borne out of the crisis that could help women secure greater rights and opportunities.

professional opportunities, while 35 per cent say men have better opportunities. A small minority, 13 per cent, believe women have greater opportunities in the professional realm. While the Arab Youth Survey tackles perceptions, in reality women's formal labour force participation rate is estimated to be at 20 per cent in the Arab world. This means the region has the lowest participation of women in the workforce in the world.

The pandemic and the ensuing measures that have been taken have largely impacted women, the primary care-givers for children and the elderly. With children studying at home and elderly people being warned to shelter at home, women have largely been required to provide for both groups. The full extent of that impact is yet to be accounted for. However, in June 2020, the OECD issued a report stating that COVID-19 will have major repercussions for women. "The MENA region has the second largest gender gap in unpaid care and domestic work worldwide. On average, women spend six times more on unpaid care and domestic work compared to men". It adds that on average "MENA women allocate 89 per cent of their working day to unpaid care work, leaving them barely any time to work for pay, compared to 20 per cent for their male counterparts". The correlation between these duties and female participation in the workforce is a strong one – and it does not appear to be moving in the right direction.

Women's workforce participation is vital for Arab economies to grow – as is the case globally. Perceptions around women having full-time jobs impact that participation, especially in terms of women getting the right support network. In this year's Arab Youth Survey, 76 per cent of the women

interviewed believe that a woman "can benefit her family most if she works," however the larger portion of those believed that this is true if she works part-time. Among women, 46 per cent believed part-time work benefited the family most, 30 per cent believed full-time work did so, while 24 per cent believed that staying at home full-time would be of the most benefit to the family. Among men, 43 per cent believed that a woman benefits her family most working part-time, but only 27 per cent believed that were the case if she worked full-time. The remaining 30 per cent of men believed that a woman benefited her family most if she remained at home full-time. The fact that both men and women see women working part-time as beneficial, coincides with global research that shows women benefit from flexible and part-time working conditions. However, these conditions often mean women can be underpaid and have less job security. COVID-19 and the ramifications it has had means that flexible working is on the rise.

The UN Economic and Social Commission for West Asia (ESCWA) estimates that women in the Arab World will lose approximately 700,000 jobs as a result of the coronavirus outbreak. However, it could also be an opportunity for more reforms that include flexible working conditions and financial support for start-ups, opening up the private sector to women. The coming years will require public and private sector support for women to recover from the impact of COVID-19. Efforts will be needed to ensure that this does not lead to a loss of achievements attained but rather to build in practices borne out of the crisis that could help women secure greater rights and opportunities.



8

MODEL NATIONS

For the ninth year running,
the UAE remains the top
country to live in and emulate

For the ninth consecutive year, the UAE remains the preferred nation for young Arabs to live in and for their own nation to emulate.

Nearly half of all young Arabs (46 per cent) said the Arabian Gulf nation would be their country of choice to live in.

Interviewees were asked to select top five nations, and the UAE secured most votes with the US, the next popular nation chosen by 33 per cent; Canada and the UK, shared the third spot with 27 per cent, and Germany, replacing Turkey from the 2019 ASDA/BCW Arab Youth Survey, won the favour of 22 per cent. In key shifts, the US gained the second spot from Canada, compared to last year.

Asked which country in the world, if any, that they would most like their country to emulate, the UAE marked another significant surge, with one in two young Arabs (52 per cent) choosing the nation, compared to 42 per cent in 2019. The US came

second with 30 per cent, followed by Germany (23 per cent), Canada (21 per cent) and Japan (20 per cent).

Asked specifically what they associate most with the UAE, young Arabs cited factors including safety and security (44 per cent), wide range of work opportunities (39 per cent), generous salary packages (32 per cent), a growing economy (31 per cent) and a good place to raise a family (25 per cent) as the top five reasons.

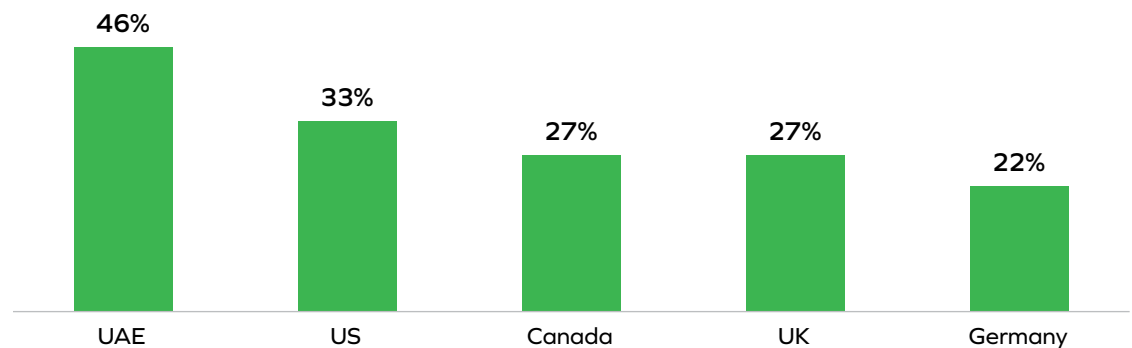
Young Arabs also cited ease of starting a business (24 per cent), welcoming and friendly to expats (also 24 per cent), high quality education system (23 per cent), respect for cultural traditions (20 per cent) and the nation's strong cultural heritage (17 per cent) as aspects they identify most with the UAE.



For the ninth year running, the UAE remains the country Arab youth would most like to live in

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

(Showing Top 5 countries)



Top 5 Countries to Live In

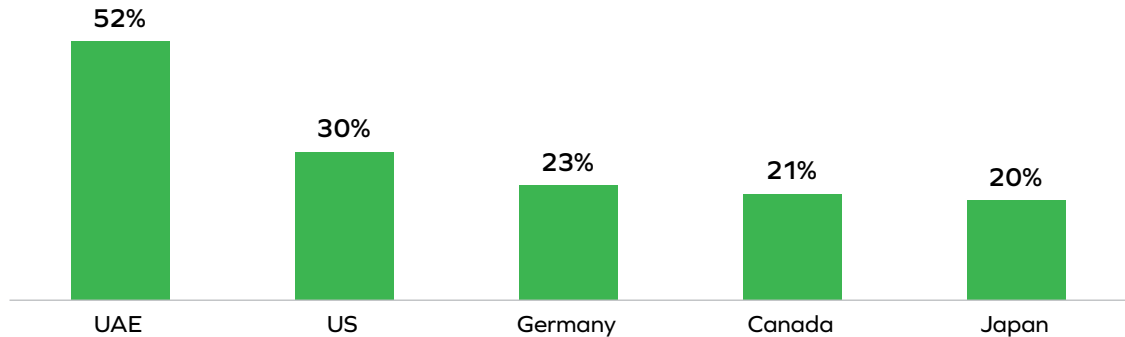
2012	2013	2014	2015	2016	2017	2018	2019
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
France	France	US	US	US	US	Canada	Canada
US	US	UK	Germany	Germany	KSA	US	US
Turkey	Turkey	KSA	Canada	KSA	Canada	KSA	Turkey
KSA	KSA	Qatar	Qatar	Canada	Germany	Germany	UK



The UAE continues to be the country Arab youth most want their country to emulate

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

(Showing Top 5 countries)



Top 5 Countries to Emulate

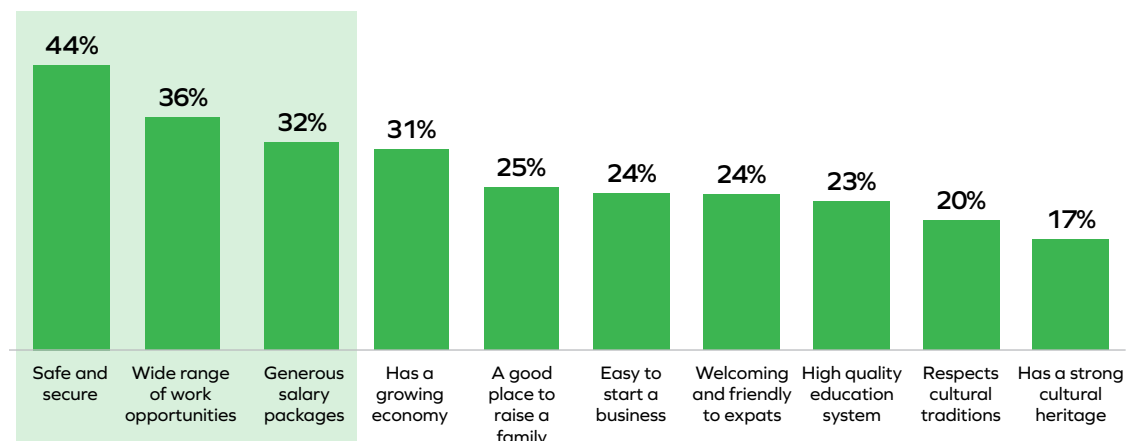
2012	2013	2014	2015	2016	2017	2018	2019
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
US	France	US	US	US	US	US	US
France	US	Qatar	Germany	Germany	Canada	Canada	Japan
Turkey	Turkey	KSA	Canada	France	Germany	Japan	Turkey
China	China	UK	France	UK	KSA	Germany	Canada



Safety and security, job opportunities and generous salaries are widely associated with the UAE

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

(Showing Top 10)





ARAB YOUTH
**COVID-19
Pulse Survey**

National pride has increased among many young Arabs since the pandemic

Since the outbreak of the pandemic, more young Arabs hold their nation in great regard and are proud to be a citizen of their country.

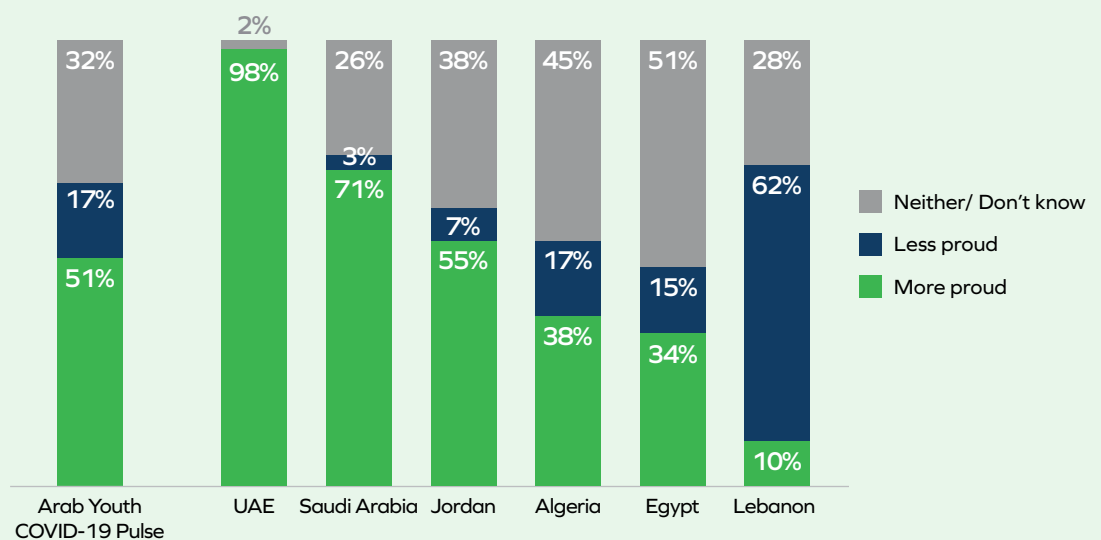
When asked if they are currently more or less proud to be a citizen of their country, 51 per cent – more than half – said they are 'more proud'.

In the UAE, an overwhelming 98 per cent of young nationals said they are 'more proud' as did 77 per cent of young Saudis.

However, pride in being citizens of their country, is less pronounced in the Levant and North Africa, especially in Lebanon where about two-thirds (62 per cent) said they are 'less proud' to be a citizen of their country.

? Compared to the period at the start of the year, would you say you are currently more or less proud to be a citizen of your country?

(Showing % of youth)



*Please note: Fieldwork was conducted shortly after the Beirut explosion on August 4, 2020, likely impacting these results

UAE pioneers new model of social, cultural and religious pluralism



Hussein Ibish

Hussein Ibish is a Senior Resident Scholar at the Arab Gulf States Institute in Washington DC. He is a weekly columnist for Bloomberg Opinion and is a regular contributor to many other publications. He has made thousands of radio and television appearances and was the Washington DC correspondent for the Daily Star (Beirut). Ibish previously served as a Senior Fellow at the American Task Force on Palestine, and as Executive Director of the Hala Salaam Maksoud Foundation for Arab-American Leadership from 2004 to 2009. From 1998 to 2004, Ibish served as Communications Director for the American-Arab Anti-Discrimination Committee. He has a PhD in Comparative Literature from the University of Massachusetts, Amherst.

It comes as no surprise that the United Arab Emirates has once again ranked first in the 2020 Arab Youth Survey as the country most desirable to live in and to be emulated. During the last nine years since this question was introduced in the survey, Arab youth have consistently identified the UAE as the top choice in both categories, not only in the Middle East, but globally. The nation leads a range of alternatives including perennially top-rated countries such as the United States, France, Canada, Germany, Japan and Turkey.

There is a perception about the overall quality of life in the UAE that is putting it on a par with, and indeed ahead of, the most prominent Western states as a domicile of choice and model for national emulation.

The UAE's consistent record in recent years of being the first-ranked choice is striking. As the most desirable place to live, it received 46 per cent of the votes compared to the runner-up, the US, at 33 per cent. And regarding the country Arab youth most want their own to emulate, the UAE has also been consistently at number one. In the 2020 survey, 56 per cent of Arab youth chose the UAE, while 30 per cent chose the US.

Why would such a large percentage of Arab youth, close to half of the large sample from a wide range of countries in the Gulf, the Levant and North Africa, express the desire to live in the UAE rather than the US, Canada, the UK and Germany? And why do more than half identify the UAE as the country to most emulate, far beyond the US, Germany, Canada and Japan?

The prospect of good jobs is clearly a factor, but that alone is not a sufficient explanation. Otherwise some other prosperous Gulf Arab countries might have been expected to also be high-ranking potential destinations, but they have not featured prominently or consistently at the top, with the partial exception of Saudi Arabia selected as a leading domicile of choice in some years. Instead, plainly there is a perception about the overall quality of life in the UAE that is putting it on a par with, and indeed ahead of, the most prominent Western states as a domicile of choice and model for national emulation for so many young Arabs.

What are the qualities Arab youth find so appealing about the UAE? Not surprisingly, three of the major factors are employment opportunities, generous salaries and a strong economy. Yet the same would certainly apply to Western countries that are also ranked high in preferred residence and best example for other countries to follow. Safety and security are actually the most important qualities cited by the huge percentage of Arab youth who favor the UAE as a destination or model. The UAE is perceived as a safe and stable environment in a frequently unsafe and unstable region, one in which society functions well under an effective and efficient government. And that's closely linked to the sense that economic opportunities abound. It also explains why the UAE would be considered a model by citizens of Arab countries, many of which struggle to provide stability, safety and economic opportunities.

Other quality-of-life issues rank highly, including good treatment of expats, a family-friendly environment, and strong educational opportunities. The UAE is almost certainly preferred to the most prominent Western societies precisely because it is an Arab and Muslim example of a dynamic,

In recent years, the UAE has been promoting a new Arab model of how government and society should interact with a range of individuals and communities based on pluralism, tolerance and diversity. That model stands in contrast to closed-minded, xenophobic and theocratic tendencies in some other regional states. The survey suggests that the UAE may be winning this argument.

well-governed and economically vibrant modern country. It is not merely that economic opportunities abound, because they can also be found in other Gulf Arab countries, not to mention Western states. And it's not just that the UAE is authentically Arab or Muslim, because, again, many other Middle Eastern countries certainly are as well. Rather it appears to be the unique combination of cultural authenticity, tradition and religious heritage along with good governance, social dynamism and international engagement that captures the imagination of young Arabs around the region.

The UAE has pioneered a model of social, cultural and religious pluralism, and an appreciation of that also seems to be reflected in the survey results. Arab youth around the region seem to understand, accurately, that not only are they likely to find employment in the UAE but that the country happily accommodates a huge range of beliefs, traditions, lifestyles and social and cultural choices. Yet it is an Arab and Muslim country strongly rooted in its heritage. That combination appears to be extremely appealing, and helps explain its high marks as a model for their own societies. In recent years, the UAE has been promoting a new Arab model of how government and society should interact with a range of individuals and communities based on pluralism, tolerance and diversity. That model stands in contrast to closed-minded, xenophobic and theocratic tendencies in some other regional states. The survey suggests that the UAE may be winning this argument.

The UAE is a geographically and demographically small Arab country, but it is exceptionally dynamic. Certainly, no other Arab state is as deeply integrated into the global economy and international cultural scene.

Dubai is virtually synonymous with cosmopolitan sophistication. Abu Dhabi is, increasingly, an Arab cultural, educational, technological and political gravitational centre. The country is remarkably bold and ambitious, as numerous initiatives, most notably the Hope Probe mission to Mars launched this summer - after the Main Survey interviews were finalised - confirm. While much of the Arab world is struggling with economic development, effective governance and social stability, one small but powerful Arab society is reaching into the cosmos. It's hardly surprising that is seen as a model by so many young Arabs.

The UAE has also championed a vision of citizenship for the Arab world based on pluralism, diversity, tolerance and patriotism. It rejects jingoism, obscurantism, xenophobia and sectarianism, traits that hamper some other societies in the region. And because of that, it is perceived, as the survey results indicate, as not only a nation to be emulated but one that is welcoming and generous to outsiders. Yet unlike its competitors in the list of countries to be emulated or lived in, it remains quintessentially Arab. The 2020 Arab Youth Survey indicates this unique combination of Arab, cosmopolitan and hyper-modern qualities is as appealing in practice as it sounds on paper.



9

FOREIGN RELATIONS

Saudi Arabia, UAE and US
are seen as the three rising
powers in the region

The role of Saudi Arabia, the UAE and the US as rising powers influencing the geopolitics of the Middle East continues to expand.

When young Arabs were asked which Arab and non-Arab nations have increased their influence in the region the most over the past five years, Saudi Arabia (39 per cent) and the UAE (34 per cent) led over other Arab states while nearly half (46 per cent) cited the US (among non-Arab nations).

Other non-Arab nations that young Arabs perceive as having increased their influence in the region include Turkey (20 per cent), Russia (16 per cent) and Iran (14 per cent).

While many young Arabs view the UAE and Saudi Arabia as their nations' allies, the perception of the US is polarising. This year, while 89 per cent of young Arabs see the UAE as their nation's ally followed by Egypt (80 per cent) and Saudi Arabia

(78 per cent), the perception of the US as an ally is shared by only 56 per cent compared to China (73 per cent), Russia (71 per cent) and Turkey (61 per cent).

Significantly, 64 per cent of young Arabs viewed Iran as somewhat of an enemy or a strong enemy of their country.

More young Arabs, however, have been viewing the US more favorably in the past two years, compared to 2018, when only 35 per cent of young Arabs saw the US as an influential ally. This was a dramatic drop from 2016 when 63 per cent of Arab youth considered the US favourably.

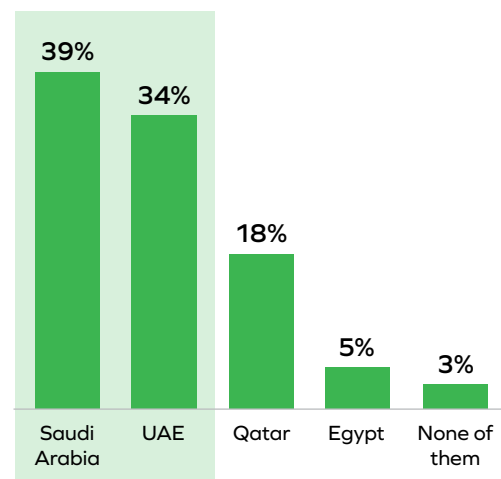
Saudi Arabia and the UAE, meanwhile, have continued to maintain a growing positive perception among young Arabs as their nation's strongest allies over the past five years.



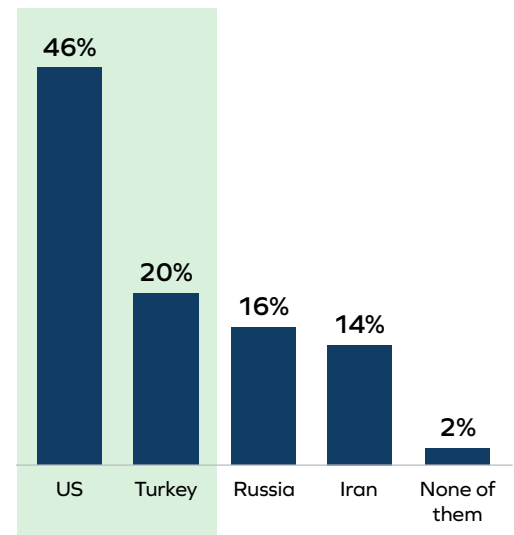
Arab youth view Saudi Arabia, the UAE and the US as the three rising powers in the region

? Which of the following [Arab/ Non-Arab] countries has increased its influence on the Arab world the most over the past five years?

Arab Countries



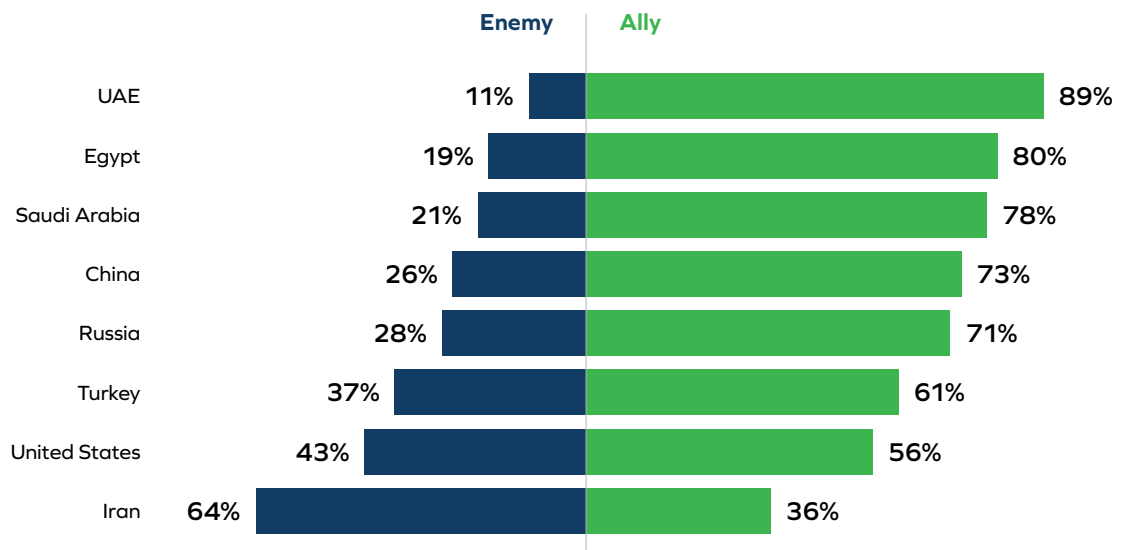
Non-Arab Countries





Majority view the UAE and Saudi Arabia as allies, while perceptions of the US are polarising

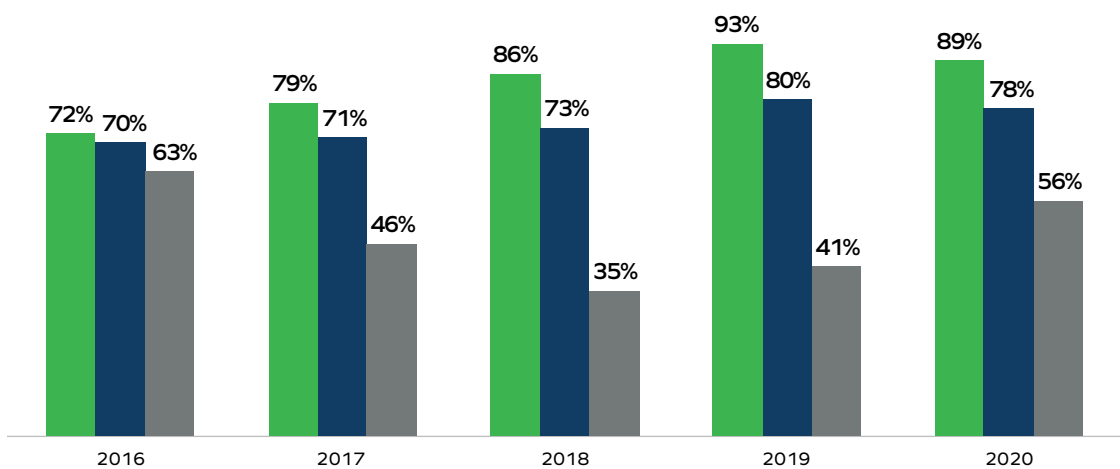
Do you consider [Country] 'A strong ally', 'Somewhat of an ally', 'Somewhat of an enemy' or 'A strong enemy' of your country?



Perceptions of the UAE and Saudi Arabia have strengthened over the past five years, while the US reputation has begun to recover

Do you consider [UAE/ Saudi Arabia/ US] 'A strong ally', 'Somewhat of an ally', 'Somewhat of an enemy' or 'A strong enemy' of your country?

(Showing % selecting 'Ally'; ally = 'A strong ally' / 'Somewhat of an ally')



*ally=strong ally/ somewhat of an ally

■ UAE ■ Saudi Arabia ■ US



ARAB YOUTH
**COVID-19
Pulse Survey**

Arab youth view the UAE and China as having shown greatest leadership in combating COVID-19

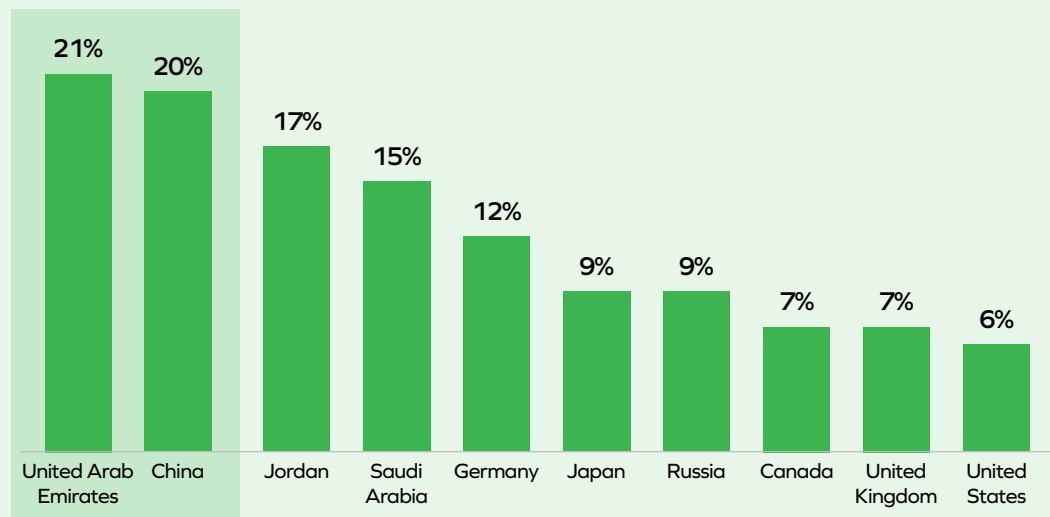
The UAE's track-record in tackling COVID-19 has gained respect among young Arabs. One in five (21 per cent) Arab youth said the nation showed the greatest leadership in combating COVID-19, slightly more than those who voted for China (20 per cent).

Young Arabs also rated Jordan (17 per cent) and Saudi Arabia (15 per cent) for their country-level leadership in addressing the crisis. Apart from China, young Arabs respect the leadership shown by Japan and Russia (9 per cent each).



Which country in the world, if any, has shown the greatest leadership in combatting COVID-19?

(Showing Top 10 countries)



Respondents were able to select their own country (e.g. UAE, Jordan, Saudi Arabia) as having shown greatest leadership.

The anguish and rage of Sunni majority capitals on Iran's role



Kim Ghattas

Kim Ghattas is a journalist, author and analyst with more than 20 years of experience in print and broadcast media, covering the Middle East, international affairs and US foreign policy. She has reported for the BBC, the Financial Times and de Volkskrant. Ghattas was part of an Emmy-award winning BBC team covering the 2006 war in Lebanon. She is currently a Non-Resident Senior Fellow at the Carnegie Endowment for International Peace. She is the author of *Black Wave: Saudi Arabia, Iran and the Forty Year Rivalry that Unraveled Culture, Religion and Collective Memory in the Middle East* (January 2020, Henry Holt) and of the New York Times best seller *The Secretary: A Journey with Hillary Clinton from Beirut to the Heart of American Power* (February 2013, Henry Holt). Ghattas is a regular contributor to The Atlantic and commentator on MSNBC, NPR, CNN and others. A dual Lebanese-Dutch citizen, she was born and raised in Beirut. She serves on the board of trustees of the American University of Beirut and on the board of directors of the Arab Reporters for Investigative Journalism (ARIJ).

In 2015, an Iranian MP close to Supreme Leader Ali Khamenei boasted that Iran had control over three Arab capitals - Baghdad, Damascus and Beirut - with Sanaa soon to follow.

His statement wasn't inaccurate. Iran had and still has a lot of clout in these capitals, more in some than others, via allies, proxies and militias. But Iran's ability to hold sway is not unbridled: in Lebanon it must navigate the complexities of a political system with no clear majority, in Iraq it has to contend with continued American military presence, while in Syria it is essentially in competition with Russia.

The answer about Iran is determined by people's perceptions of America's role in the region today, under President Trump who has rolled out a policy of maximum pressure on Iran.

But the statement amplified the anguish and rage in Arab capitals in countries with a Sunni majority about Iran's role in the region. The decade that followed the US-led invasion of Iraq in 2003, which indirectly unleashed Iranian power, was an era of lamentations in the Sunni world amid warnings of a Shia crescent.

The Jordanian king was the first to speak of this crescent in 2004 stretching from Iran to Lebanon via Iraq as a potentially destabilising development for Gulf countries and the whole region. While the dispute is not one driven by sectarian differences, religion has been used by both sides to whip up sentiments and define the camps in opposition to each other.

During the Obama presidency, the insecurity of Arab states was further exacerbated by his negotiations with Iran on the nuclear programme and unwillingness to act forcefully to curb Iran's expansionism.

The response in the ASDA'A BCW Arab Youth Survey to the question of who is a rising power in the region in 2020, five years after that statement by that Iranian legislator, is therefore fascinating: Iran was only seen as a rising (non-Arab) power by 14 per cent of respondents across the region, meanwhile Saudi Arabia received the vote of 39 per cent of respondents and the UAE got 34 per cent.

There is however a key player here: the US. In the survey, Iran and the United States were grouped in the category of non-Arab countries with the US gathering the most votes (46 per cent) as the country that gained most power in the last five years. In other words, the answer about Iran is determined by people's perceptions of America's role in the region today, under President Trump who has rolled out a policy of maximum pressure on Iran with further sanctions and tough talk.

Perceptions of power matter greatly in geopolitics though the reality of life on the ground is still dismal for people. One must now also factor in the impact of COVID-19 on all countries in the region, economically and socially, and how this shapes their sense of power and their real ability to assert it.

In addition, the survey was conducted soon after the assassination of Qassem Soleimani in an American strike on his convoy in Iraq, as he was leaving Baghdad airport. His death was met with quiet jubilation in places such as Saudi Arabia and the UAE, as well as open celebrations in parts of Lebanon and Iraq, where Iran's role has begun to grate and where it has faced protests since last autumn, but also in Syria where Iran's support for President Assad has come at high cost for the civilian population. Even so, opinions about the US are very divided with 43 per cent viewing it as an enemy. Perceptions of power are not necessarily proportional to how much a country is seen as a friend or an enemy, since Iran, though seen as powerful by only 14 per cent, is described as an enemy by 64 per cent of those surveyed.

It would have been fascinating to ask the question without separating Arab and non-Arab countries or at least to group Iran with regional countries, to see precisely how Iran's regional power is seen, not in opposition to the US but in comparison to Saudi Arabia and the UAE.

Because a turning point did indeed come five years ago, when Saudi Arabia decided to flex its military muscle in an unprecedented way and retake the initiative by launching Operation Decisive Storm against Houthi rebels in Yemen in March 2015. The rise of Crown Prince Mohammed Bin Salman has also added to the impression that the Kingdom is gaining power: MBS has broken with the tradition of compromise that has long dominated Saudi foreign policy and has been much more forceful with his actions.

The UAE has also taken on an increasingly more forceful role in parts of the region, including militarily from Yemen to Libya. Combined with Trump's bombast against Iran, the apparent campaign of covert operations of sabotage inside Iran targeting nuclear facilities, ports and other infrastructure, and now, the normalisation of ties between the UAE and Israel, there is no doubt that the sense of powerlessness vis-à-vis Iran that has pervaded some Arab capitals since 2003 has eased.

Perceptions of power matter greatly in geopolitics though the reality of life on the ground remains dismal for millions of people, no matter which regional power they cheer for, from the humanitarian disasters in Syria and Yemen to the economic collapse of Lebanon, from the repression in Egypt to the rapid devaluation of the Iranian currency. The COVID-19 pandemic has only added to people's despair and the shrinking of regional economies, but has not altered the growing sense of confidence that Saudi Arabia and the UAE feel with regards to Iran. However, that confidence may ebb dramatically if a Biden administration returns to a policy of US engagement with Iran, unless it is a part of a wider dialogue that properly addresses the concerns of America's regional allies.



10

DIGITAL GENERATION

Young Arabs are increasingly embracing the digital revolution; use of online platforms has surged since the pandemic

With fast-growing internet and social media penetration, the Arab world is rapidly-evolving as a digital-first region. Young Arabs, most of them digital-natives, have been embracing the ongoing social media and digital technology revolution, which reflects in their lifestyle habits.

The shift to a digital-first mindset is highlighted by the continued growth in social media consumption by young Arabs and which has now become by far their most popular source of news;

In fact, the popularity of social media as a source of news has been nothing short of transformational among young Arabs in the past five years. In 2015, when just one in four (25 per cent) young Arabs cited social media as their source of news, in 2020, 79 per cent (nearly four out of five) say their primary source of news is social media.

This has been largely independent and not directly impacting TV or print media. While TV as a primary source of news, as cited by young Arabs, declined from 60 per cent in 2015 to 56 per cent today, print media (newspapers) continues to be of lower priority as a source of news at 21 per cent now, compared to 22 per cent in 2015.

This, however, also means that one in two young Arabs and one in five young Arabs see TV and newspapers as their primary sources of news. Online media shed the popularity it gained in 2019 when 61 per cent cited it as their primary source of news falling to 55 per cent today.

Young Arabs are turning to their smartphones for entertainment including to watch movies. When asked which method they use most frequently to watch video content, 62 per cent cited their smartphones, compared to TV at just 12 per cent.

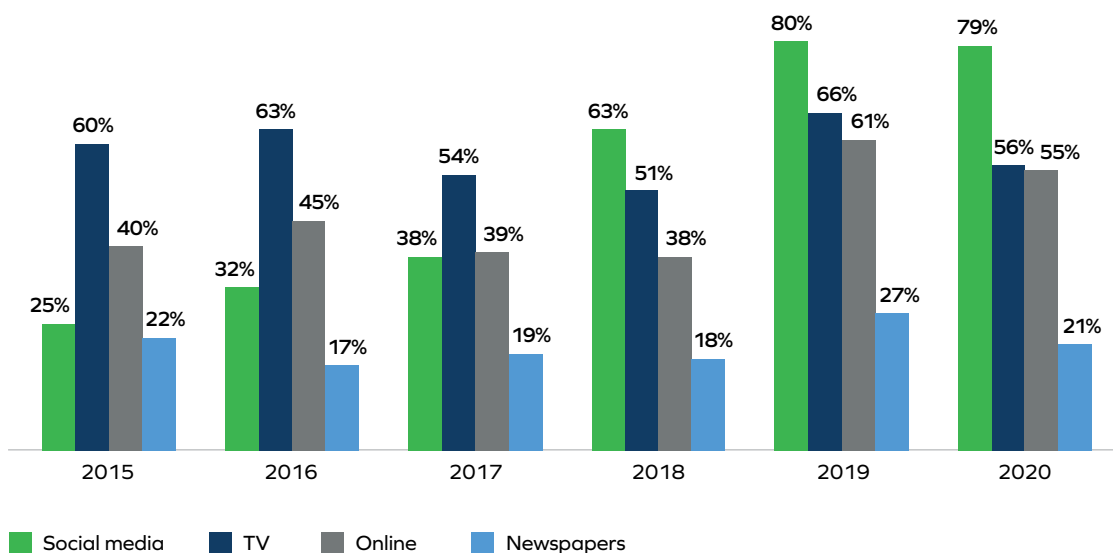
But when it comes specifically to watching movies, TV continues to be popular at 30 per cent but lower in preference and use than smartphones at 32 per cent. Only one in ten (11 per cent) said they frequent cinemas to watch movies. A good majority of young Arabs also subscribe to video and music streaming with 62 per cent citing they have subscribed to 'a streaming service'.

The pervasive impact of digital technology has altered how young Arabs shop too. Today, most young Arabs (80 per cent) shop online, a steady growth over the past two years, when only just over a half (53 per cent) said they go online for shopping.



Social media has grown to become by far the most common news source among Arab youth

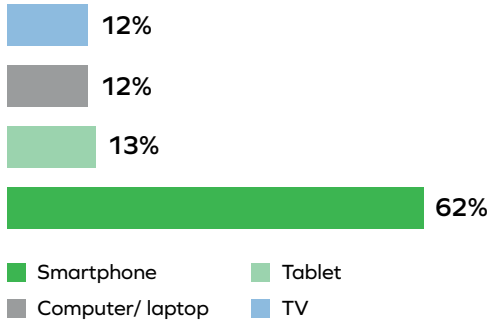
? Where do you get your news?



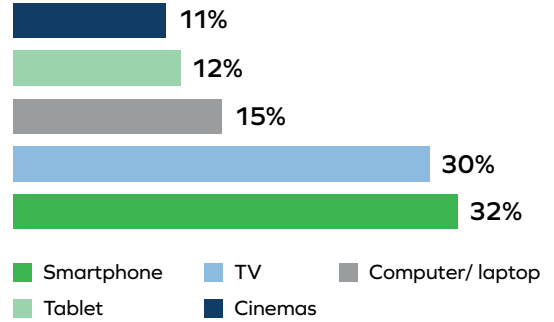


Young Arabs are turning to their smartphone to watch videos, including movies

Which method do you use most frequently to watch video content?

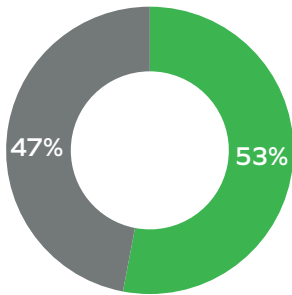


Now thinking specifically about movies, which method do you use most frequently to watch movies?



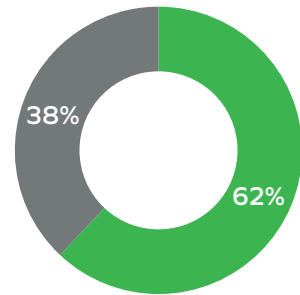
A majority of Arab youth subscribe to video and music streaming

Do you subscribe to any video streaming services?



Subscribe to online video streaming

Do you subscribe to any music streaming services?



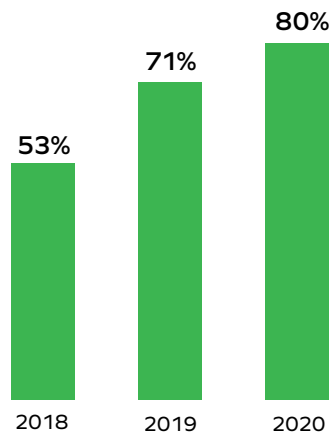
Subscribe to online music streaming



Since 2018 e-commerce has experienced exponential growth among Arab youth and a majority of them now shop online

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

(Showing % shopping online)





ARAB YOUTH
**COVID-19
Pulse Survey**

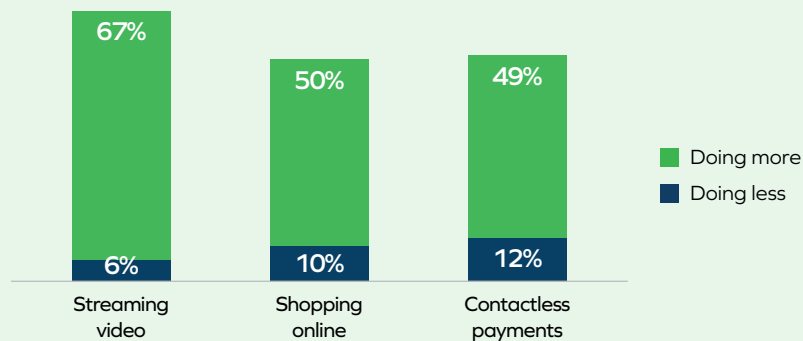
COVID-19 is further accelerating Arab youth's embrace of the digital transformation

The digital-first Arab youth generation has embraced online platforms for shopping and entertainment during COVID-19. When asked whether they are shopping online, streaming video content and making contactless payments more or less frequently now, Arab youth said they are doing more of all three.

While 67 per cent said they are streaming more videos, half of young Arabs said they shop online more and nearly as many (49 per cent) said they make more contactless payments.

? During the COVID-19 outbreak, are you doing the following actions more or less frequently?

(Showing % among youth; not including 'Neither more nor less frequently'/'Not applicable')



‘If you can’t get them in eight seconds, you have lost them’



Muna Shikaki

Muna Shikaki is an on-air correspondent and video journalist for Al-Arabiya News Channel, a leading Arabic language news network. Based in Washington DC since 2004, she covers a broad range of subjects, from US elections and politics, to foreign policy and the Arab and Muslim American communities. Shikaki has reported from over thirty US states, Guantanamo Bay, Dubai, the Palestinian Territories and South America. She was a 2004 Fulbright scholar at Columbia University in New York, where she earned her MS in Journalism. She completed her BA at Birzeit University in Ramallah, Palestine.

Social media is the number one source of news for Arab youth. It overtook TV two years ago and, at around 80 per cent, is three times as popular as a source of news as it was just five years ago. This finding is one of the most substantial trends that the 2020 ASDA'A BCW Arab Youth Survey notes. Far fewer American youth report using social media for news, at just 31 per cent for ages 18-24 according to a recent Pew poll. Interestingly, the percentage of Arab youth relying on TV for news has not decreased substantially in the past five years. Youth are simply consuming more news.

Ironically, the more time viewers spend on social media in the aggregate, the shorter their attention spans are becoming. The average attention span of our followers for video is one minute on Facebook, 45 seconds on Twitter and a mere 30 seconds on Instagram. Only YouTube, where audiences go specifically seeking longer videos to watch, holds people's attention for a grand total of five minutes.

In a year of tumultuous news that started with increased US-Iranian tensions, the targeting of Qassem Soleimani in Iraq, and progressed to the global COVID-19 pandemic, youth have a voracious appetite for consuming news. They're glued to their smartphones. This generational, voracious content consumption presents both a challenge and an opportunity for content creators.

To better understand this trend, I turned to Al-Arabiya's social media team. Starting at the beginning of the year, consumption of Al-Arabiya's digital platforms, from Facebook to Twitter to Instagram to YouTube, has doubled since last year. Not surprisingly, our largest consumers of digital media are audiences aged 18-24. A substantial number of viewers are desperate for updated and reliable news related to the pandemic and have more time to consume it due to COVID-19 shutdowns.

Ironically, the more time viewers spend on social media in the aggregate, the shorter their attention spans are becoming. Al-Arabiya's social media guru Farah Al-Ibrahim told me that the average attention span of our followers for video is one minute on Facebook, 45 seconds on Twitter and a mere 30 seconds on Instagram. Only YouTube, where audiences go specifically seeking longer videos to watch, holds people's attention for a grand total of five minutes.

Al-Ibrahim told me she believes TikTok's one-minute video limit is making consumers expect even shorter videos. "Digital media viewers are fast movers, if you can't get them in eight seconds, you've lost them," she says. Yes, that was eight seconds.

This follows a progression that's been happening for decades. When I started working as a Washington DC-based correspondent for Al-Arabiya in 2004 our standard story length was four minutes.

Many consumers of our social media have started demanding more transparency about the sources of our news, exhibiting critical thinking and savviness. This, in addition to a concerted effort by social media platforms to cull fake news related to COVID-19, may be a turning point that alerts more viewers to the distinction between fake and real news.

This has been slowly shrinking to less than two minutes for a current report. In their early years, social media platforms were a repository for made-for-TV news. Now, news reporting is conforming to the consumption trends set by social media. As a journalist, I fear viewers are losing context and background as a result, but at the same time, there's no going back to longer videos with today's audiences.

In addition, the proliferation of fake news and viral disinformation is another disturbing trend. That same Pew study reveals that Americans who rely on social media for their news are less engaged and knowledgeable than those who rely on TV, radio or print news. There is no reason to assume Arab youth differ on this front. This is even more alarming when you imagine the number of people who rely on social media for pertinent medical advice about COVID-19.

At the same time, there are some encouraging trends: increasingly, Al-Arabiya's most popular videos are explainer-type stories that give context to the biggest news stories of the day. A report that detailed the reason oil prices crashed down to US\$ 1 a barrel this spring went viral on all our platforms and was more popular than the actual story that announced the news.

And although fake news gets constantly shared in the comments section of news reports published on shareable platforms, our social media department has been seeing a slow increase in user awareness.

Many consumers of our social media have started demanding more transparency about the sources of our news, exhibiting critical thinking and savviness. This, in addition to a concerted effort by social media platforms to cull fake news related to COVID-19, may be a turning point that alerts more viewers to the distinction between fake and real news.

There are also positive opportunities to seize. For example, not only does social media present on-demand access to information for youth, but the creators of this content also have instant feedback; we know what stories get traction with retweets, thumbs-ups and comments, and we can measure our reach and optimise future coverage accordingly. We can provide multiple short reports on any one important topic that fact-check and provide context, background and multiple sides of a debate.

Despite all this reliance on social media, consumers still switch to their trusted TV stations (usually via livestream) when there is breaking news, according to Al-Arabiya's digital media team. When people need fast and reliable news, they know that established news stations are the places to tune into.



Social, economic and social media indicators 2020

Country	Population (million)	GDP PPP (US\$ billion; 2020 est.)	Contribution of oil to GDP (%)	Youth (15 to 24 years) unemployment (% of total labour force)	Internet users (million & penetration; 2020)	Active social media users (million & penetration; 2020)	Mobile subscriptions (million & penetration; 2020)
GCC							
Bahrain	1.7	78.4	17.2	4.6	1.65 (97%)	1.4 (82%)	2.19 (131%)
Kuwait	4.27	359.16	52.8	15.8	4.2 (99%)	4.2 (99%)	7.38 (173%)
Oman	5.11	217.9	26	15.4	4.66 (91%)	2.8 (55%)	6.24 (122%)
Saudi Arabia	34.8	1,991	22.2	28.6	32.33 (93%)	25 (72%)	40.2 (115%)
United Arab Emirates	9.89	808.7	30	7.3	9.73 (99%)	9.73 (99%)	18.38 (185%)
Sub-total	55.77	3,455.16			52.57	43.13	74.39

Levant and Other Middle East							
Jordan	10.2	102.54	Not Significant (NS)	35	8.7 (85%)	5.8 (58%)	8.23 (81%)
Iraq	40.22	749.85	65	25.1	29.8 (74%)	21 (53%)	40.89 (101%)
Lebanon	6.82	74.63	NS	17.6	5.35 (78%)	4.1 (60%)	4.65 (68%)
Palestinian Territories	5.1	15.5*	NS	49.6*	3.38 (66.3%)	2.7 (54%)	4.33 (85%)
Syria	17.5	37	Not Available	20.9	7.6 (43.5%)	6 (34%)	14.31 (82%)
Yemen	29.8	96.94	25.46*	24	7.9 (26.5%)	2.5 (8.5%)	17.82 (60%)
Sub-total	109.64	1,076.46			62.73	42.1	90.23

North Africa							
Algeria	43.85	696.2	20	29.5	25.4 (58%)	22 (50%)	49.48 (113%)
Egypt	102.3	1,482.14	NS	31.1	49.23 (48.1%)	42 (41%)	92.7 (90%)
Libya	6.87	89.44	60	50.5	5.1 (74%)	5.1 (74%)	11.4 (166%)
Morocco	36.9	356.3	NS	22.1	23.74 (64.3%)	18 (48.7%)	43.35 (117%)
Sudan	43.85	220.8	NS	31.4	13.12 (29.9%)	1.3 (3%)	32.83 (75%)
Tunisia	11.8	160.5	NS	36.3	7.9 (66.8%)	7.3 (61.8%)	17.77 (150%)
Sub-total	245.57	3,005.38			116.59	95.7	247.53

Total for all 17 states covered	410.98	7,537			231.89	180.93	412.15
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Sources:

- Population: <http://worldpopulationreview.com/countries/>
- GDP: International Monetary Fund - shorturl.at/gdHV7; Trading Economics (<https://tradingeconomics.com/syria/gdp>) for Syria; GDP of Palestine is based on estimate by the Palestinian Monetary Authority - shorturl.at/gIDMY, and that of Lebanon from Statista.com (shorturl.at/denA4)
- Share of oil in GDP: Bahrain - Bahrain Economic Quarterly Q1 2020 by Ministry of Finance and National Economy (shorturl.at/hyKT8); Oman - Government Budget 2020 (shorturl.at/oFX28); Kuwait: Kuwait Central Statistical Bureau (<https://www.kuna.net.kw/ArticleDetails.aspx?id=2885950&language=en>); Saudi Arabia: General Authority for Statistics (https://www.stats.gov.sa/sites/default/files/gdp_national_accounts_indicators_2020q1_kpen_2.pdf); UAE - UAE Ministry of Economy - Annual Economic Report 2019 (shorturl.at/pJW2); Iraq - Iraq Economic Monitor by World Bank Group (<http://documents.worldbank.org/curated/en/771451524124058858/pdf/125406-WP-PUBLIC-P163016-Iraq-Economic-Monitor-text-Spring-2018-4-18-18web.pdf>); Yemen: TheGlobalEconomy.com as of 2017 (https://www.theglobaleconomy.com/Yemen/oil_revenue/); Algeria - OPEC (https://www.opec.org/opec_web/en/about_us/146.htm); Libya - OPEC (https://www.opec.org/opec_web/en/about_us/166.htm)
- Youth unemployment: World Bank - <https://data.worldbank.org/indicator/sl.uem.1524.zs>; Palestinian Central Bureau of Statistics (youth unemployment among those aged 20 to 24) <http://www.pcbs.gov.ps/post.aspx?lang=en&itemID=3135>
- Internet users & penetration; social media users and mobile usage: Internet World Statistics; Data Reportal (<http://www.internetworldstats.com>); <https://datareportal.com>

i About us



ASDA'A was founded in 2000 as an independent agency by Sunil John, who leads the agency in its 20th year. In 2008, WPP acquired a majority stake in the firm and ASDA'A became a part of the Burson-Marsteller global network. After the merger of Burson-Marsteller and Cohn & Wolfe in 2018 to create BCW (Burson Cohn & Wolfe), the firm is now ASDA'A BCW. The agency employs more than 160 professionals across seven wholly-owned offices and nine affiliates in 15 Middle East & North Africa (MENA) countries. The agency serves over 100 retained clients and is the leading PR consultancy in MENA.

www.asdaa-bcw.com



PSB is a global insights and analytics consultancy. For more than 40 years, PSB has provided actionable insights and guidance for corporate, government and public sector clients in over 100 countries. With deep expertise across qualitative and quantitative research and social and predictive analytics, PSB brings an integrative approach to helping clients solve their most complex challenges and win in highly competitive situations. PSB is a member of the BCW Group of companies, which is part of WPP (NYSE:WPP), a creative transformation company.

www.psbinsights.com



BCW (Burson Cohn & Wolfe), one of the world's largest full-service global communications agencies, is in the business of moving people on behalf of clients. BCW delivers digitally and data-driven creative content and integrated communications programs grounded in earned media and scaled across all channels for clients in the B2B, consumer, corporate, crisis management, purpose, healthcare, public affairs and technology sectors. BCW is a part of WPP (NYSE: WPP), a creative transformation company.

www.bcw-global.com



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

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