



13th Annual Edition 2021

HOPE FOR THE FUTURE

arabyouthsurvey.com

asdaa-bcw.com

bcw-global.com



Introduction



Now in its 13th annual edition, the ASDA'A BCW Arab Youth Survey **is the largest study of its kind of the Arab world's largest demographic - its over 200 million youth**. The survey fills a vital gap in critical data and insights on this very important demographic segment. The evidence-based insights inform governments, the private sector, multilateral institutions and academics on policy-making and business strategy.

The 13th Annual ASDA'A BCW Arab Youth Survey was conducted by **international research firm PSB Insights** to explore the hopes, fears and aspirations of young Arabs **in 50 cities and territories in 17 states in the Middle East and North Africa region**. The **face-to-face interviews** were conducted by professional interviewers from June 6 to June 30, 2021, covering **3,400 young Arabs aged 18 to 24**.

The interviews were conducted **exclusively with young nationals in each state** in Arabic and English. The sample split was **50:50 male/female**. The survey covered 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 and others** (Jordan, Iraq, Lebanon, Palestinian Territories, Syria and Yemen).

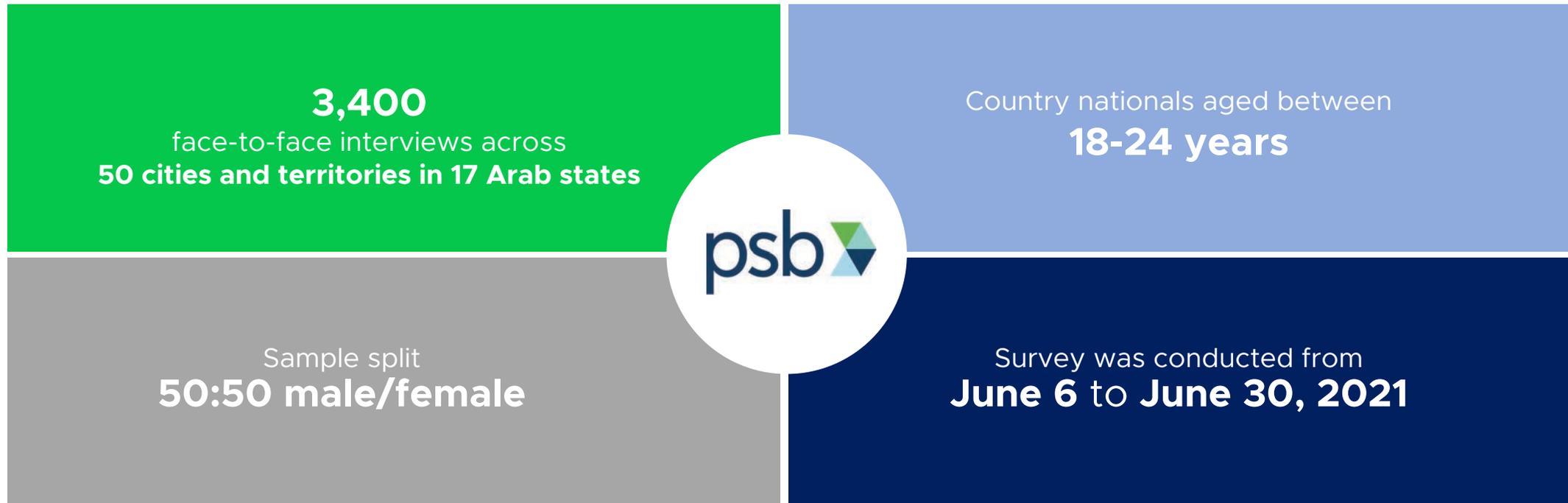
Since 2008, we have been conducting this study, because we believe, to understand the Arab world, one must understand the hearts and minds of its youth. **To ensure the survey's independence and credibility**, we fund the survey entirely ourselves, and provide the top findings on www.arabyouthsurvey.com

The findings of this year's survey will surprise you with the optimism of young Arabs, the highest level recorded in the past five years, despite the current challenges the region faces. That is why we have headlined the 2021 Annual ASDA'A BCW Arab Youth Survey - **'Hope for the Future'**. Hope you find the survey results interesting and useful.

Sunil John

President- MENA, BCW
and Founder of ASDA'A BCW

Survey methodology – 3,400 face-to-face interviews



For comparative analytics, data from our 2020 survey is used in this report. However, these are from face-to-face interviews conducted from January to March, before the COVID-19 pandemic impacted the region.

Survey methodology – 17 Arab states in three groups



GCC

Bahrain, Kuwait, Oman,
Saudi Arabia and the UAE

Levant & Others

Iraq, Jordan, Lebanon,
Palestinian Territories,
Syria and Yemen

North Africa

Algeria, Egypt, Libya,
Morocco, Sudan and Tunisia*

*The survey was conducted among Tunisian youth prior to the country's president Kais Saied dismissal of the prime minister and suspended the parliament in July 2021.

Survey methodology – covering 50 cities and territories



3,400 face-to-face interviews were conducted from June 6 to June 30, 2021, by professional interviewers. The interviews were completed in Arabic and English. Margin of error is +/-

1.65% for the total sample and larger for sub-groups. Every country included is equally represented in the results of this survey. Sample details are below:

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

Countries and gender were weighted equally.

1

OUTLOOK

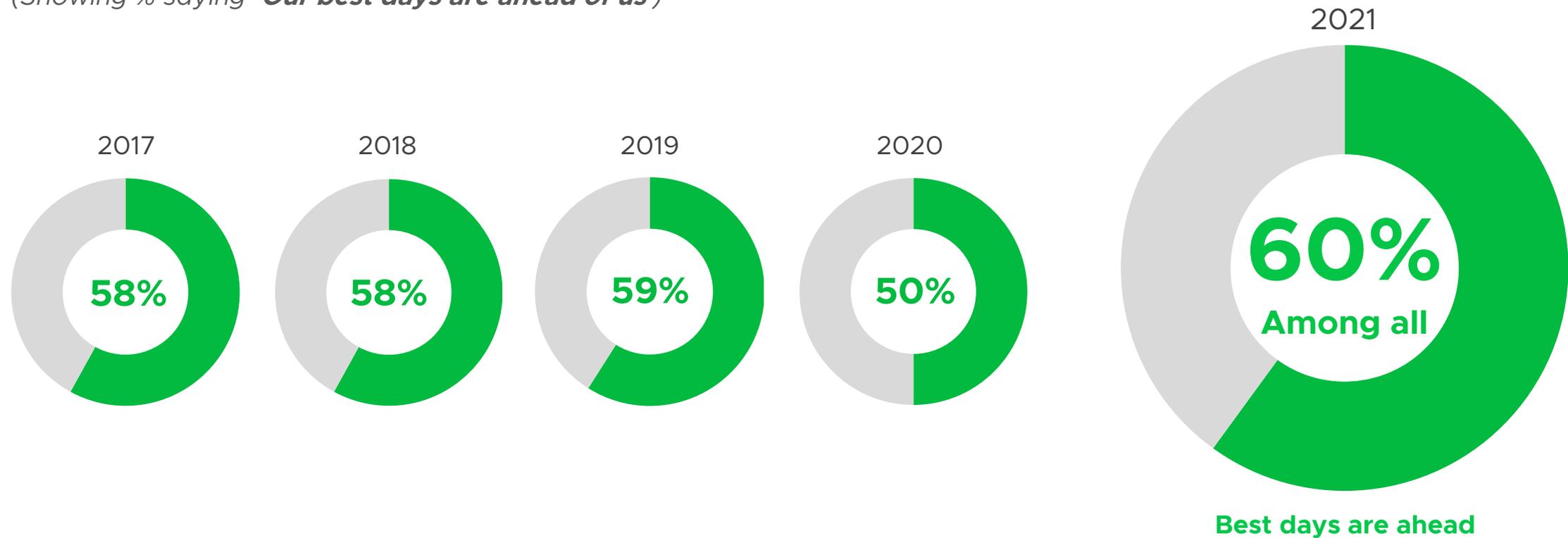
Despite the pandemic, ongoing conflicts and record economic decline, most Arab youth are optimistic that their best days lie ahead of them



Six in 10 young Arabs believe their best days lie ahead

Which of the following do you agree with?

(Showing % saying '*Our best days are ahead of us*')

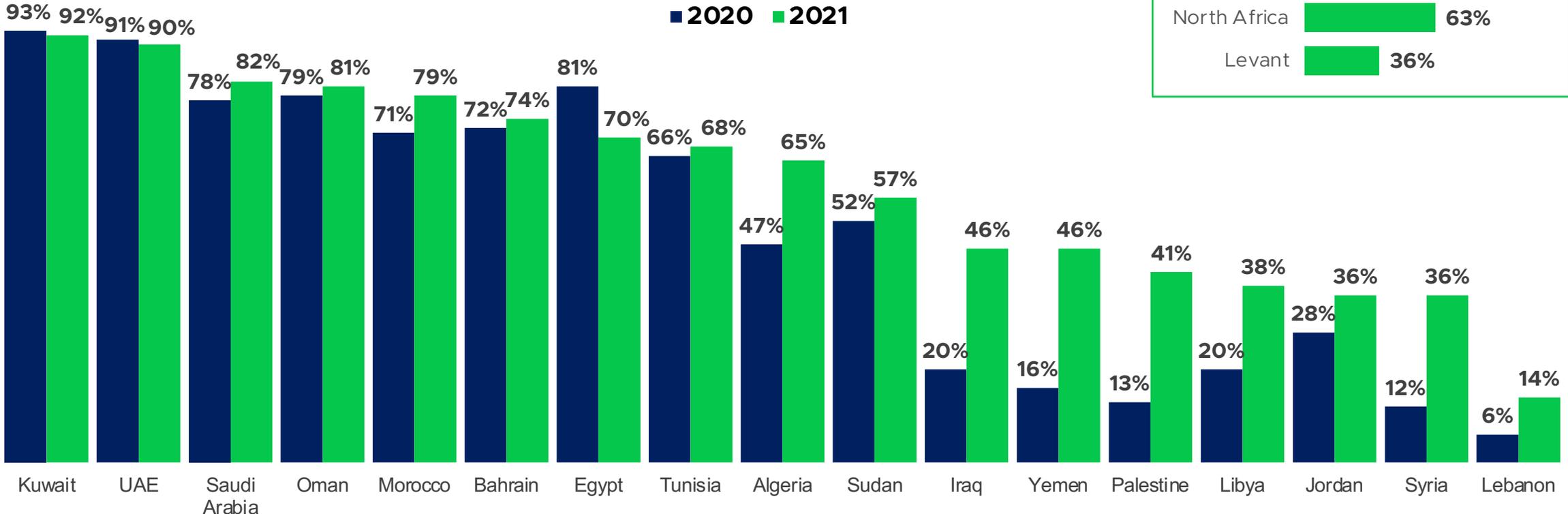


GCC youth remain overwhelmingly optimistic, while there has been a spike in optimism among youth in the Levant and North Africa



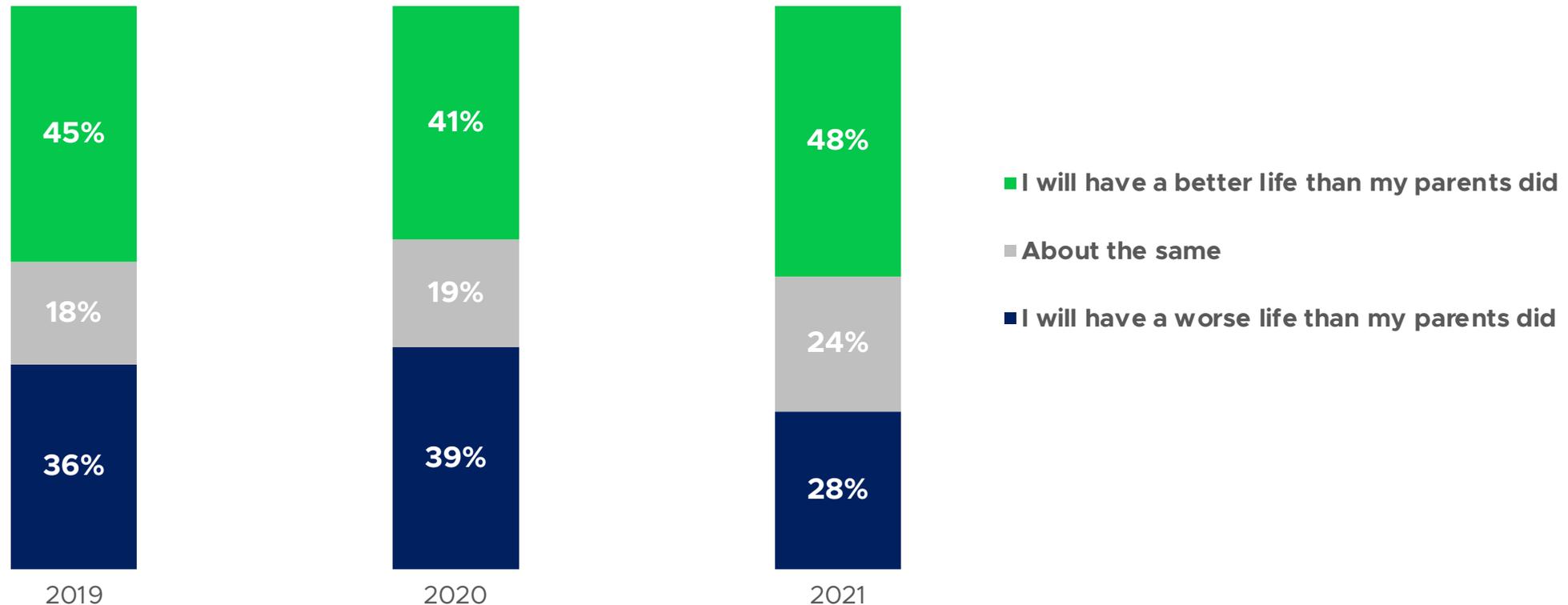
Which of the following do you agree with?

(Showing % saying 'Our best days are ahead of us')



About half of young Arabs say they will lead a better life than their parents – the highest level in three years

Which of the following is closer to your view?

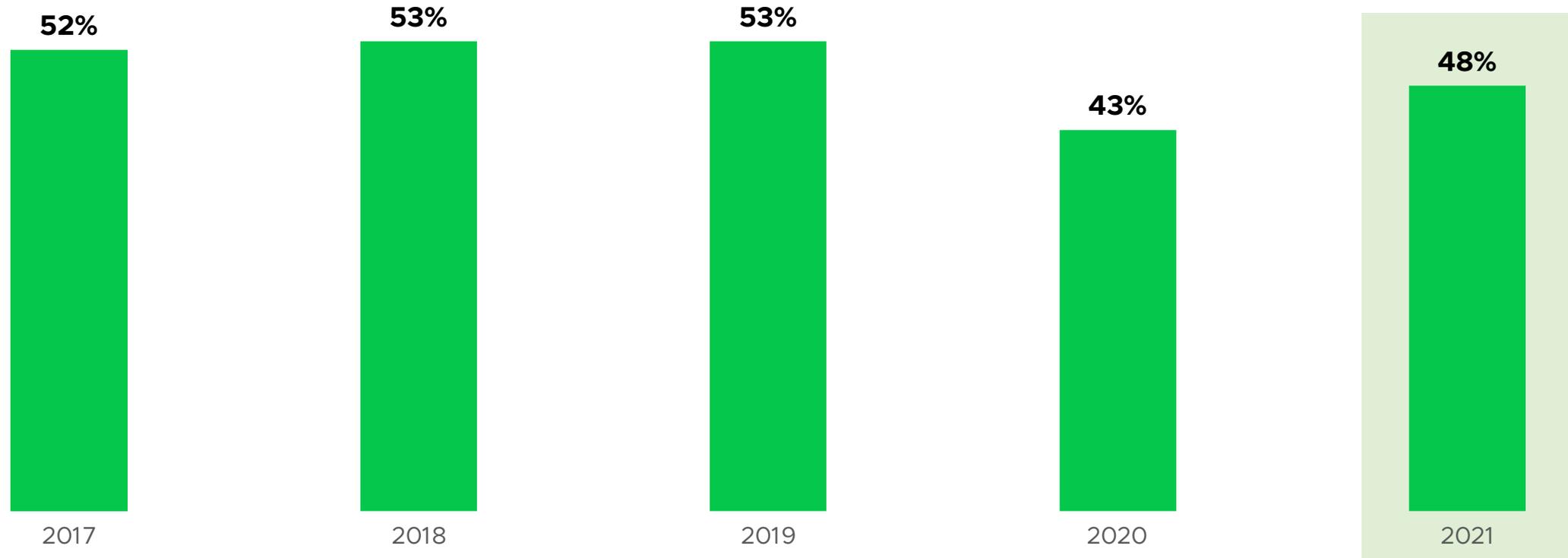


(Not including 'Don't know')

About half say their country's economy is going in the right direction

In general, do you think the economy in your country is going in the right direction or in the wrong direction?

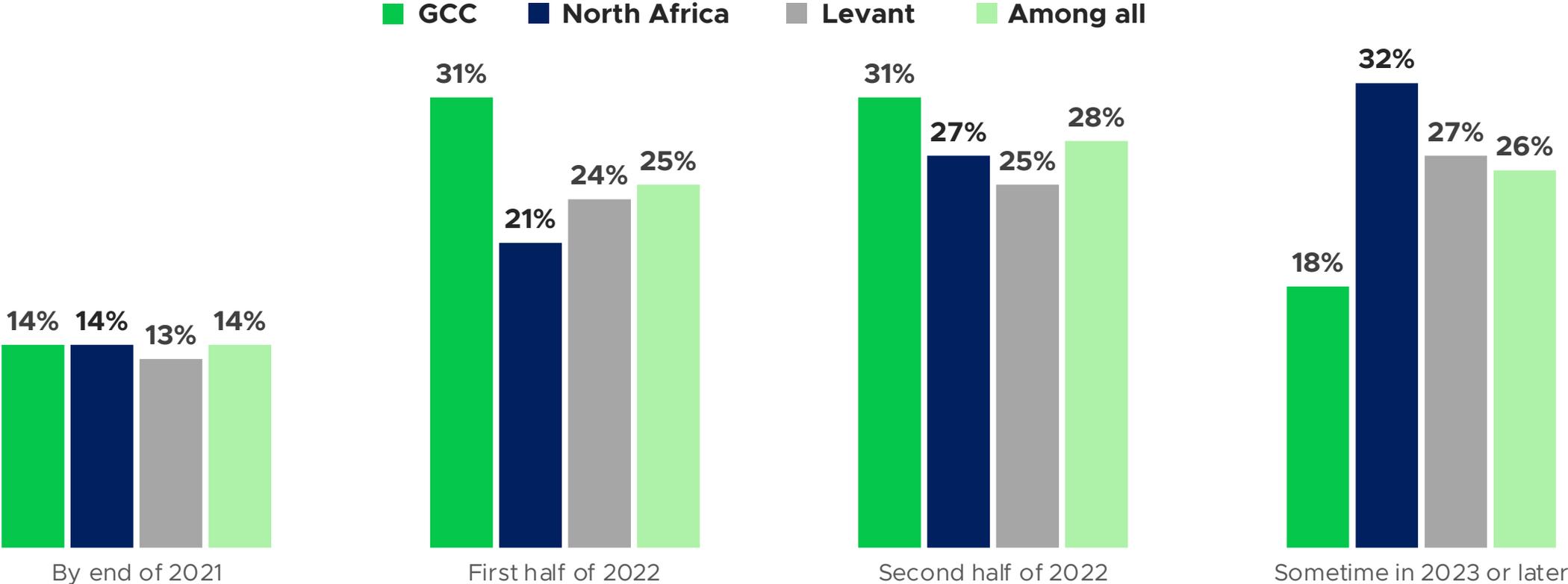
(Showing % saying '*Right direction*')



Most Arab youth expect a full economic recovery in 2022; youth in the GCC expect a quicker return to normalcy



When do you think your country’s economy will be fully recovered from the impact of the COVID-19 pandemic?



(Not including ‘Don’t know’)

2

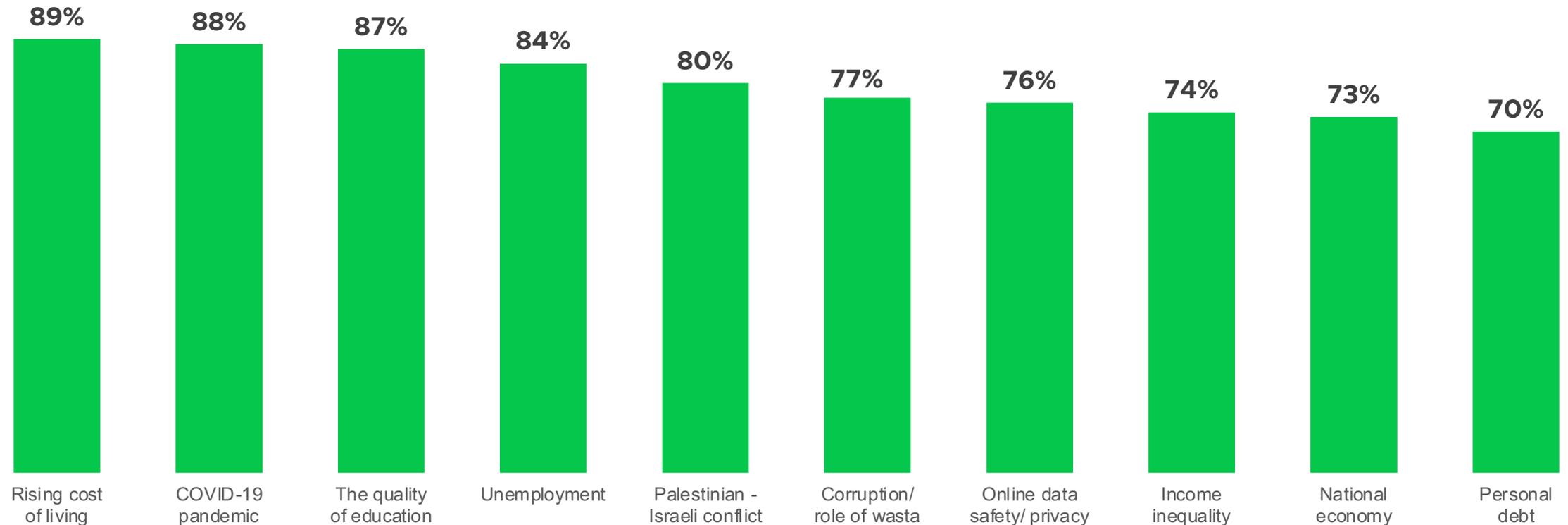
OBSTACLES

Rising cost of living and other 'kitchen table' issues are seen as top obstacles, as over a third of young Arabs struggle to make ends meet

Young Arabs see 'kitchen table issues' and government corruption as the top obstacles facing the region

How concerned would you say you are about each of the following issues?

(Showing % **'Very concerned'** and **'Somewhat concerned'**, top eight concerns)

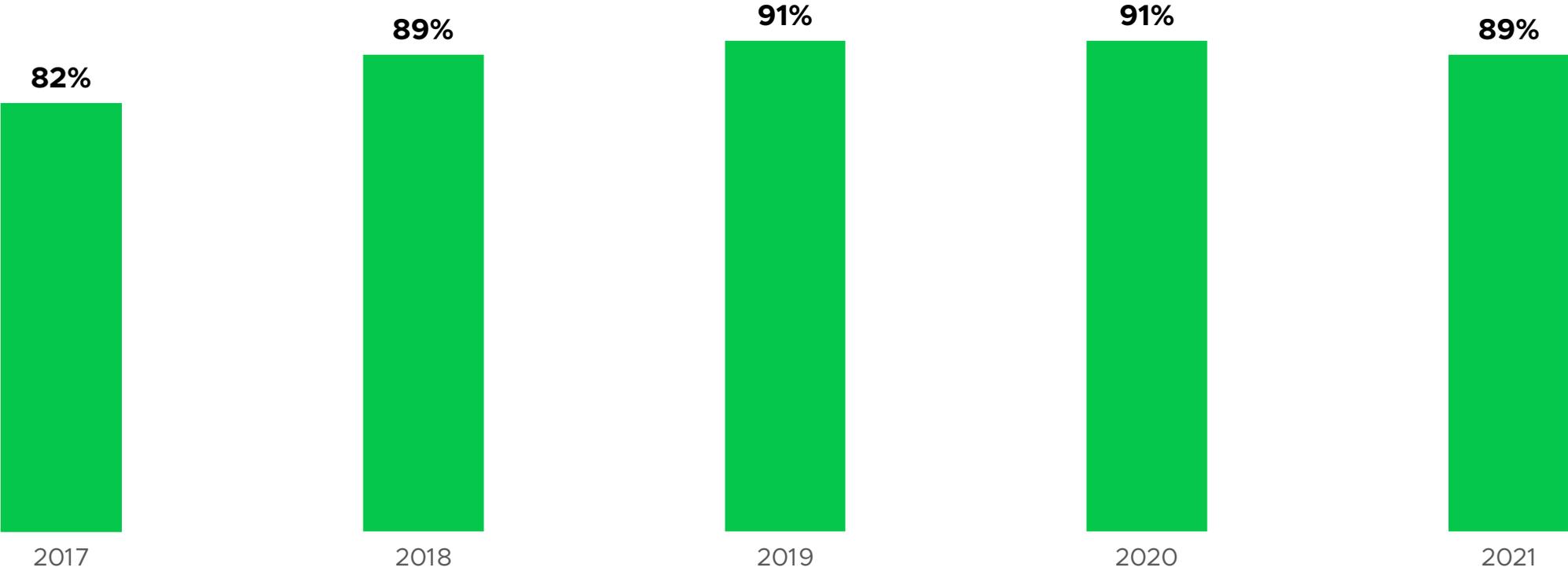


Concern over the rising cost of living has remained persistently high over the last five years



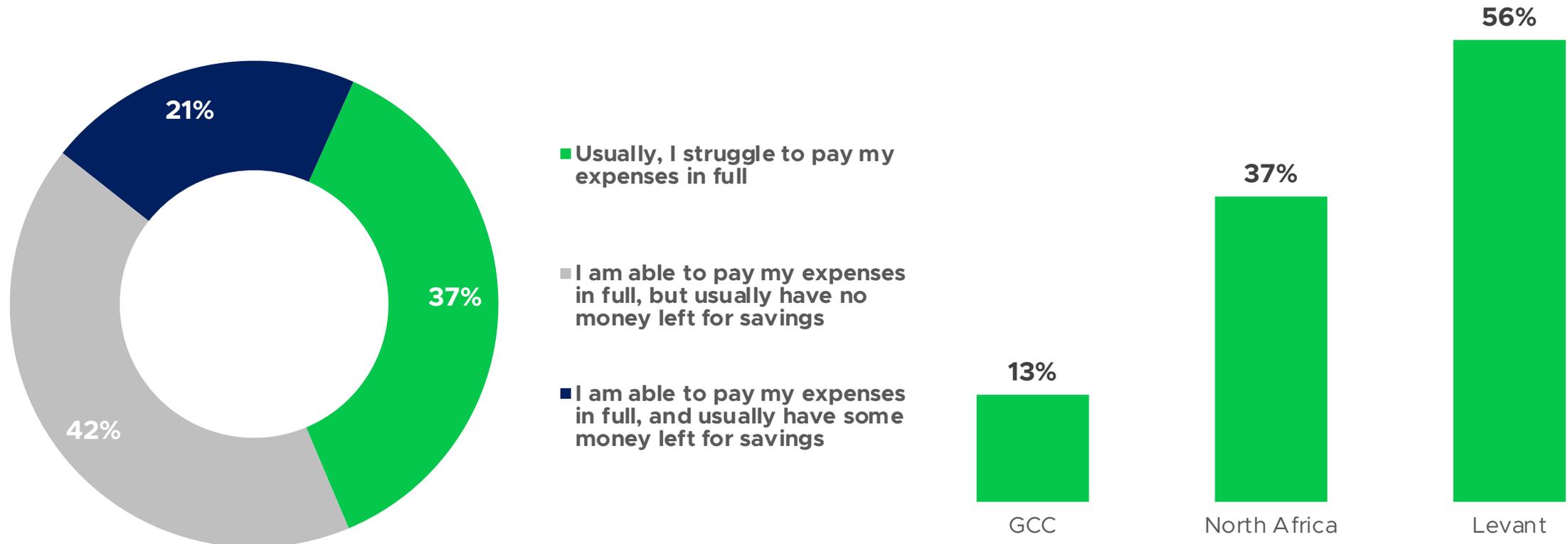
How concerned would you say you are about the rising cost of living?

(Showing % of **Very concerned** and **Somewhat concerned**)



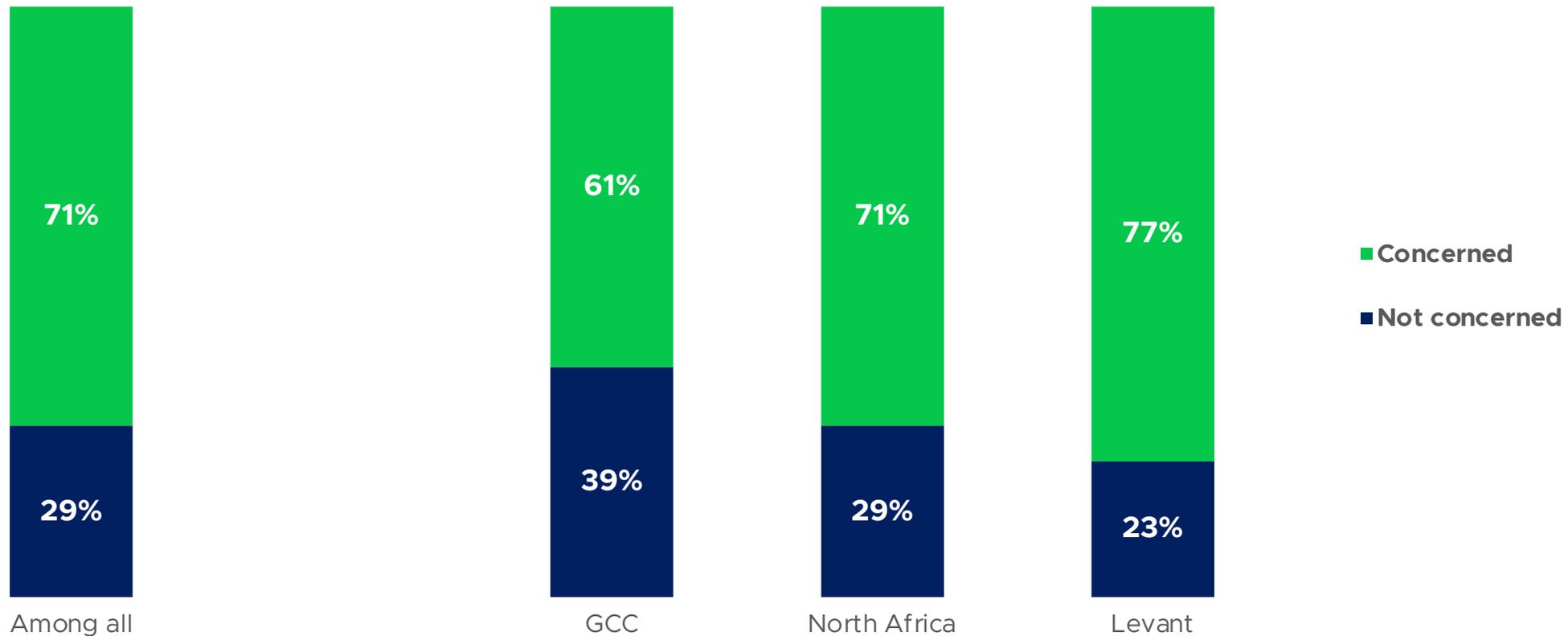
Over a third of young Arabs say they struggle to meet their expenses, rising to over a half in the Levant

Which of the following best describes you when it comes to paying for the expenses you incur on a regular basis?

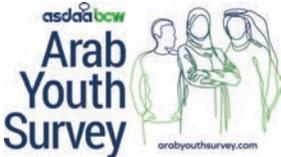


More than two-third of young Arabs are concerned about personal debt

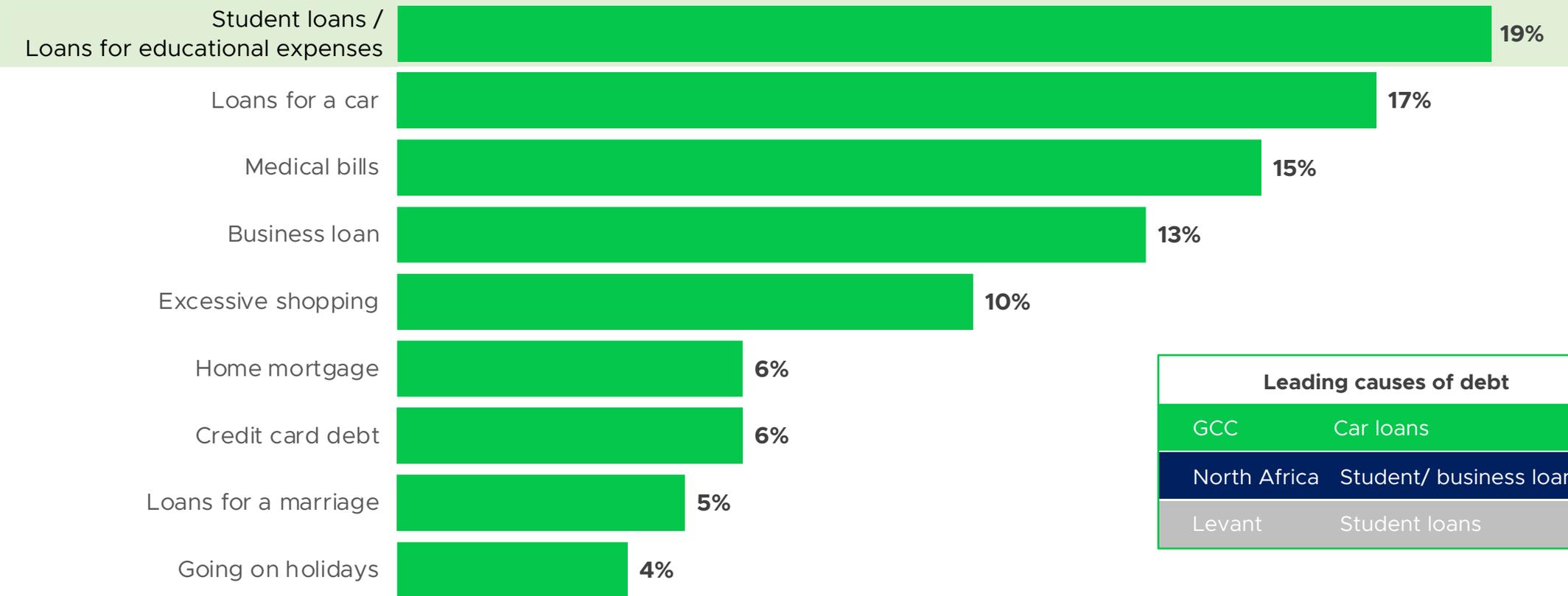
How concerned would you say you are about personal debt?



Educational expenses are the most common reason for Arab youth's personal debt



What is the main reason for your debt?



Leading causes of debt	
GCC	Car loans
North Africa	Student/ business loans
Levant	Student loans

(Not including 'Don't know' and 'Others')

3

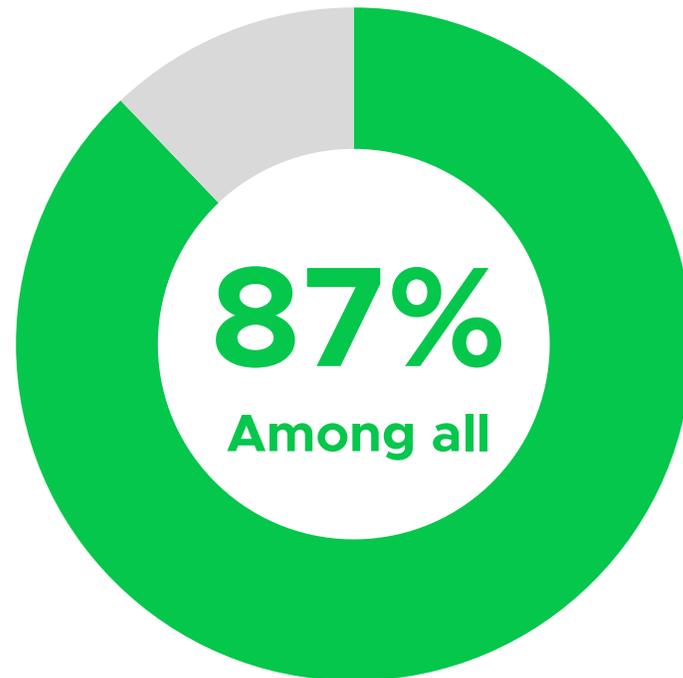
EDUCATION & JOBS

With difficulties in accessing quality education and getting jobs, more young Arabs are turning to entrepreneurship

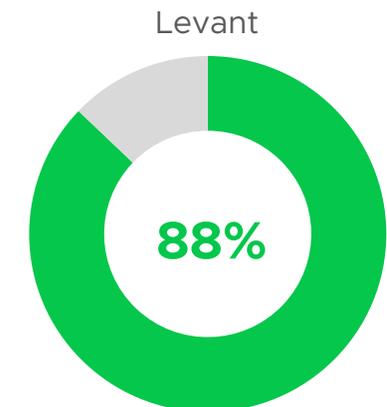
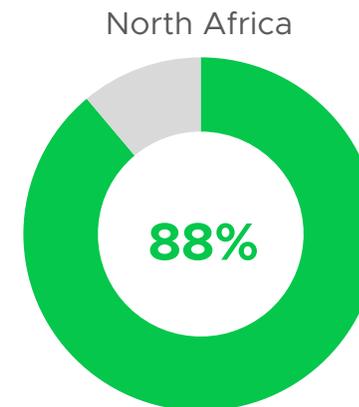
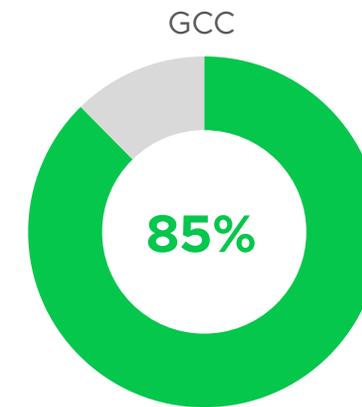
An overwhelming majority of Arab youth are concerned about the quality of education in their country

How concerned would you say you are about the quality of education?

(Showing % of **'Very concerned'** and **'Somewhat concerned'**)

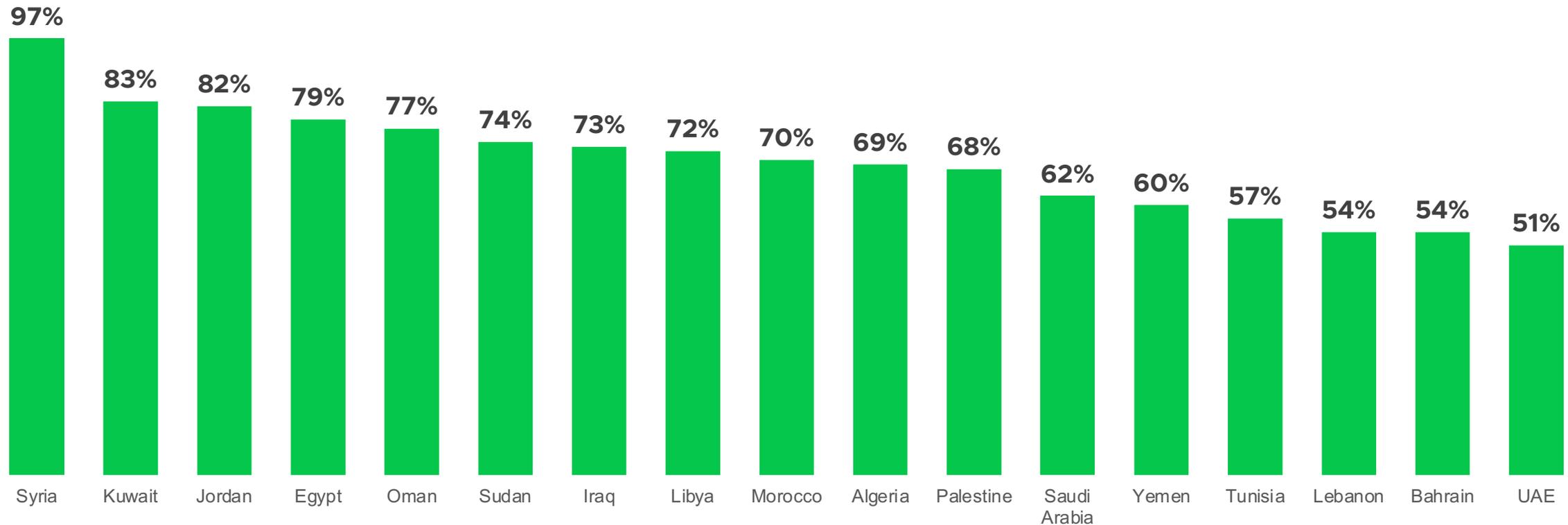


Concerned about the quality of education



The COVID-19 pandemic has negatively affected the educational experience of youth across the Arab world

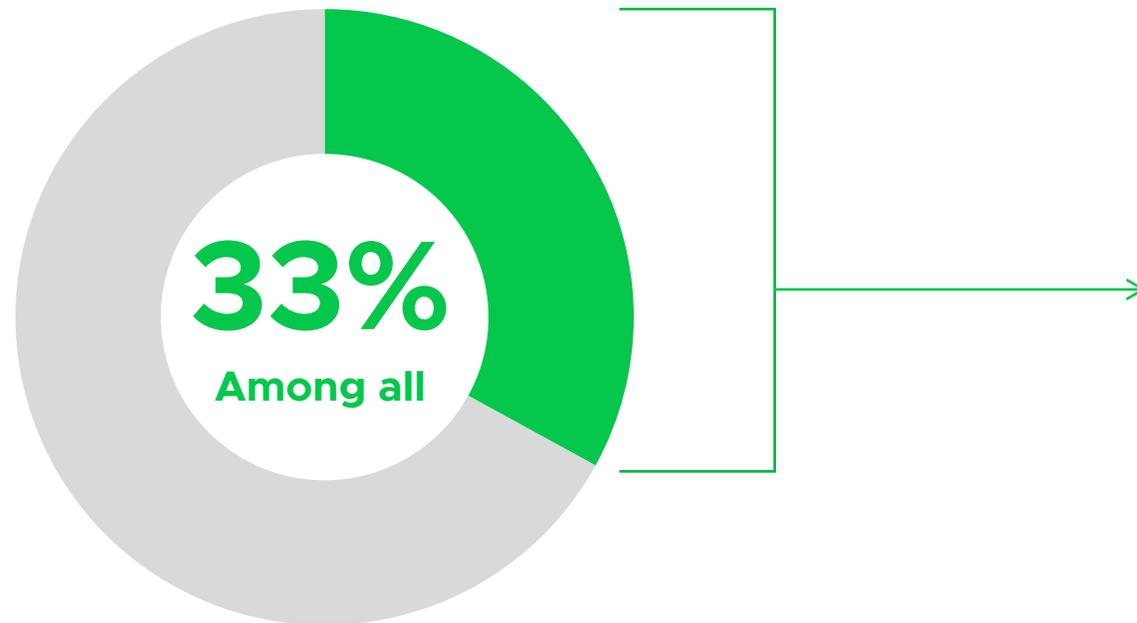
Thinking about the COVID-19 pandemic, what impact, if any, has COVID-19 had on the overall education experience?
(Showing % of **'Negative impact'**)



A third of Arab youth have had someone in their family lose their job due to COVID-19, and most have yet to find another job

Are you personally aware of anyone who has lost their job due to COVID-19?

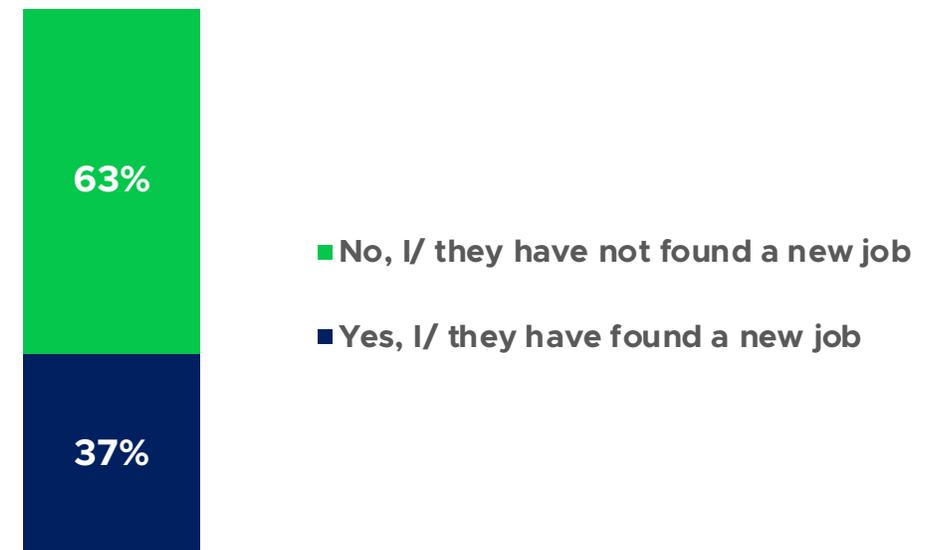
(Showing % of **'Yes, me or my family member'**)



I/ someone in my family has lost a job due to COVID-19

Have you or your family member been able to find a new job?

(Showing % of **'Yes'**)

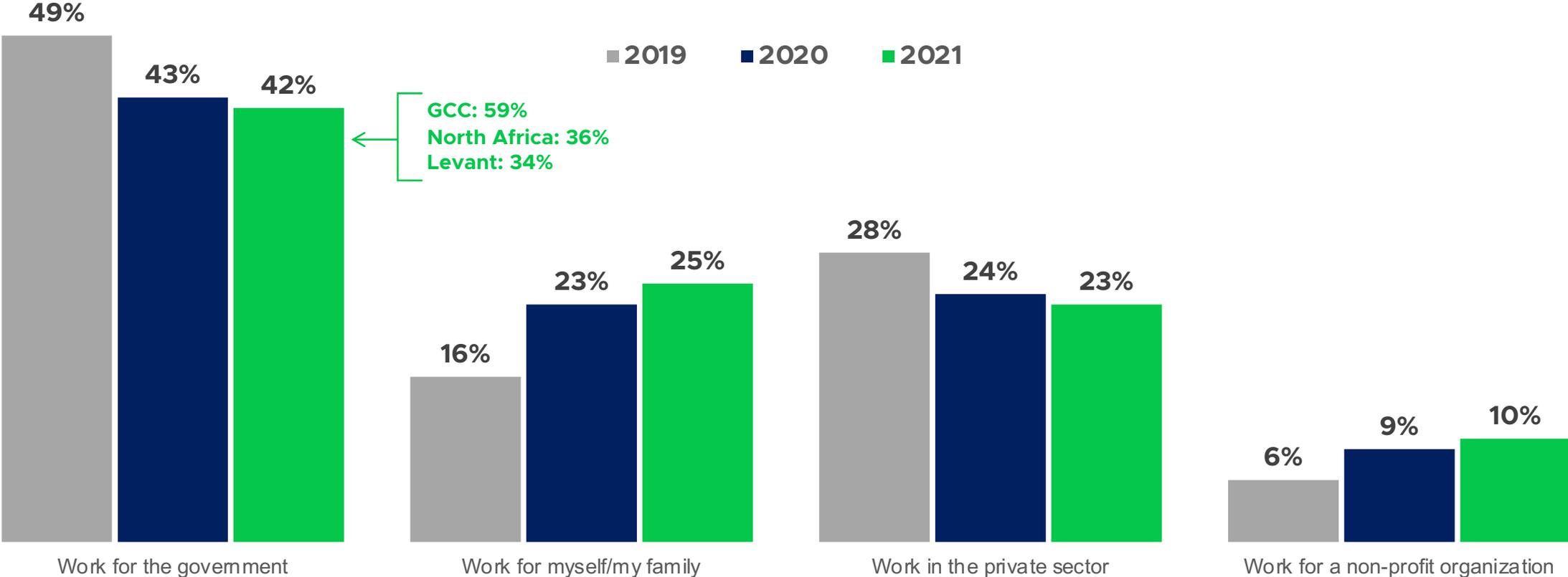


- No, I/ they have not found a new job
- Yes, I/ they have found a new job

Though government jobs are a big draw, an increasing number of young Arabs prefer to work for themselves or their family



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



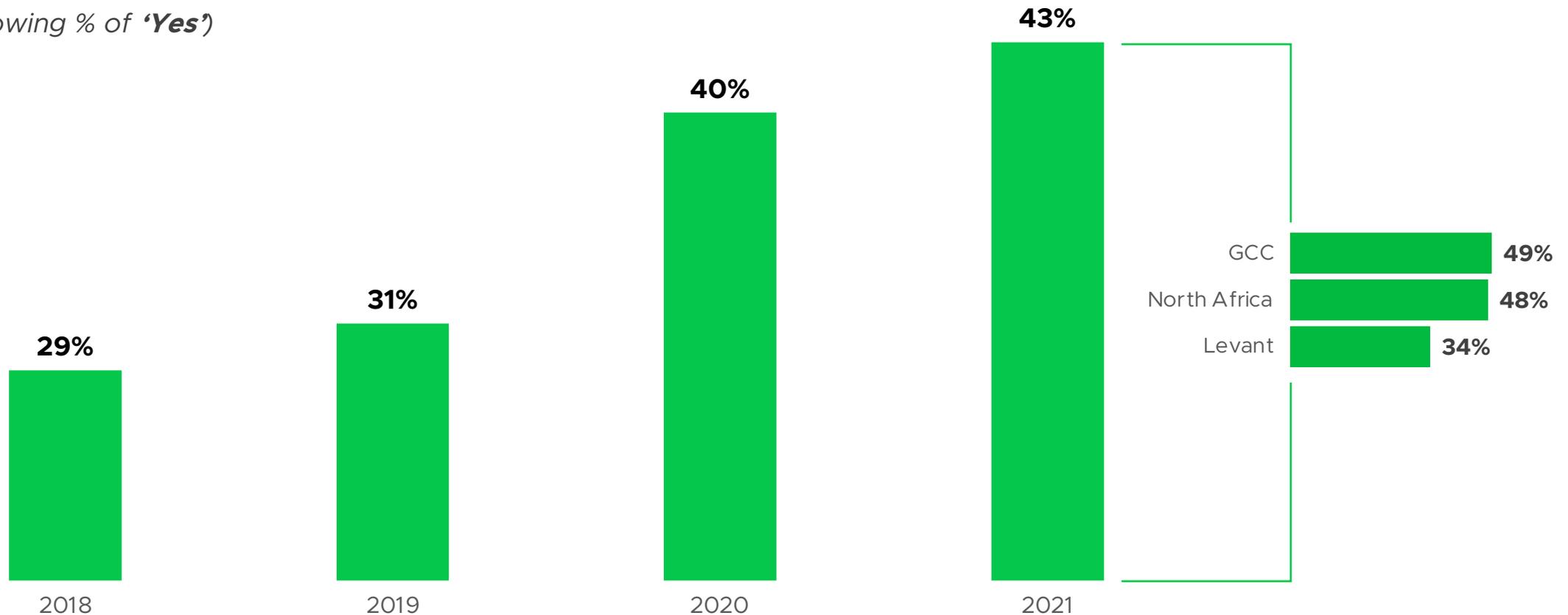
(Not including 'Don't know')

Arab youth are increasingly interested in starting their own business within the next five years



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

(Showing % of 'Yes')

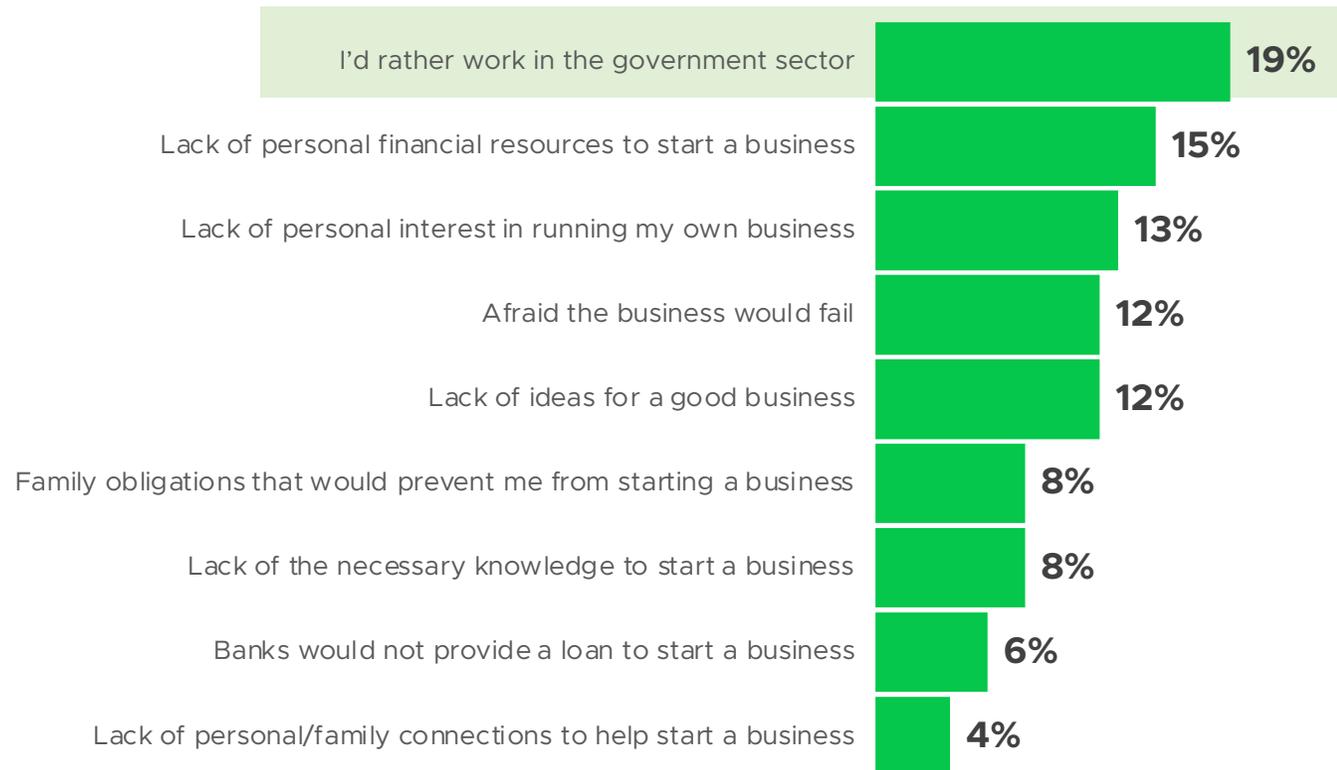


The continuing appeal of government jobs may be holding back greater entrepreneurship across the region



Which of the following is the primary reason you do not intend to start your own business within the next five years?

(Only among those who ***‘do not intend to start their own business’***)



Top 3 barriers for entrepreneurship

GCC	North Africa	Levant
Preference towards working in the government sector	Preference towards working in the government sector	Lack of resources to start a business
Lack of ideas for a good business	Lack of interest in running my own business	Preference towards working in the government sector
Afraid the business would fail	Lack of resources to start a business	Afraid the business would fail

(Not including 'Don't know' and 'Others')

4

ROLE OF GOVERNMENT

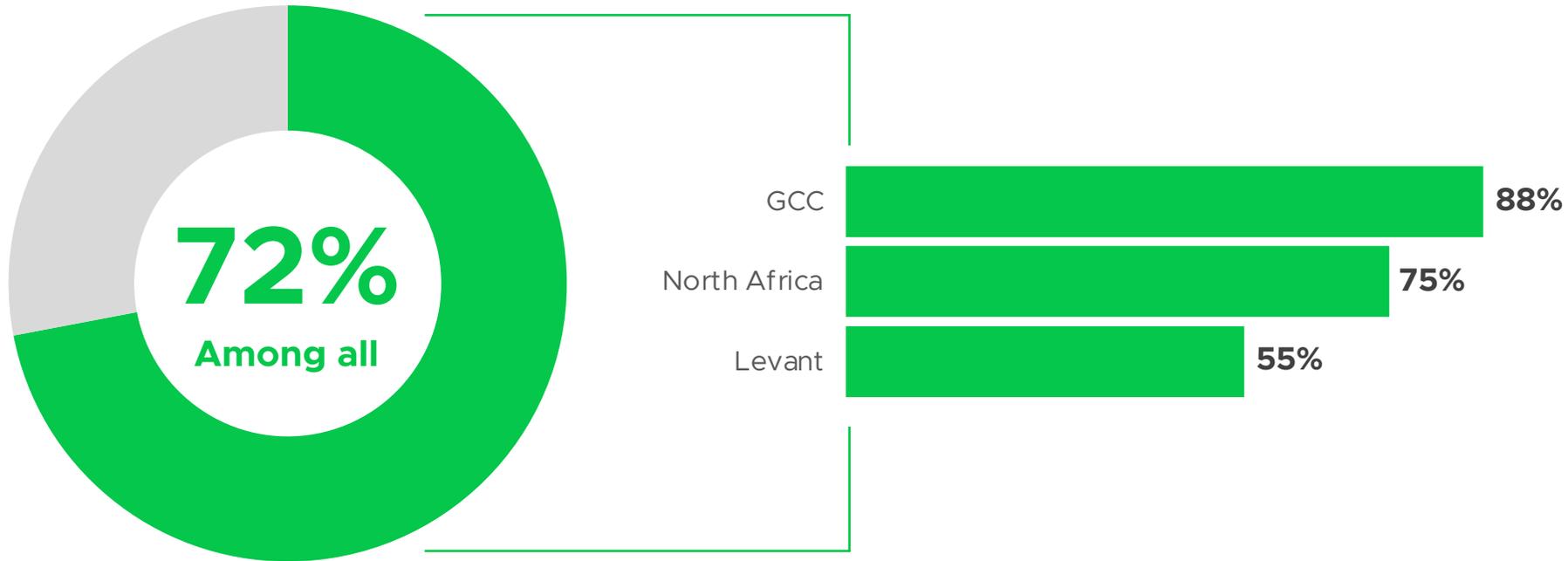
Young Arabs say their voice matters to their leadership and expect governments to tackle nepotism and promote youth entrepreneurship

Nearly three-quarters of young Arabs say their voice matters to their country's leadership



How strongly do you agree or disagree that your voice matters to your country's leadership?

(Showing % saying '**Strongly agree**' or '**Somewhat agree**')

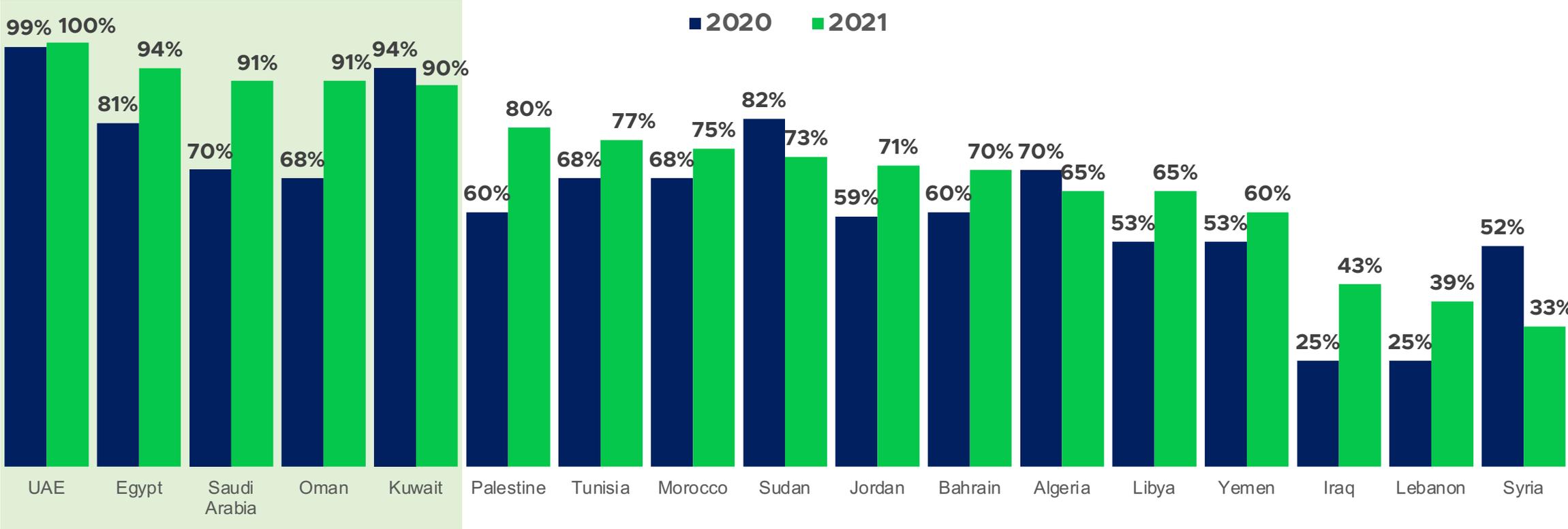


Young Arabs in UAE, Egypt, Saudi Arabia, Oman and Kuwait are most confident their voice matters



How strongly do you agree or disagree that your voice matters to your country's leadership?

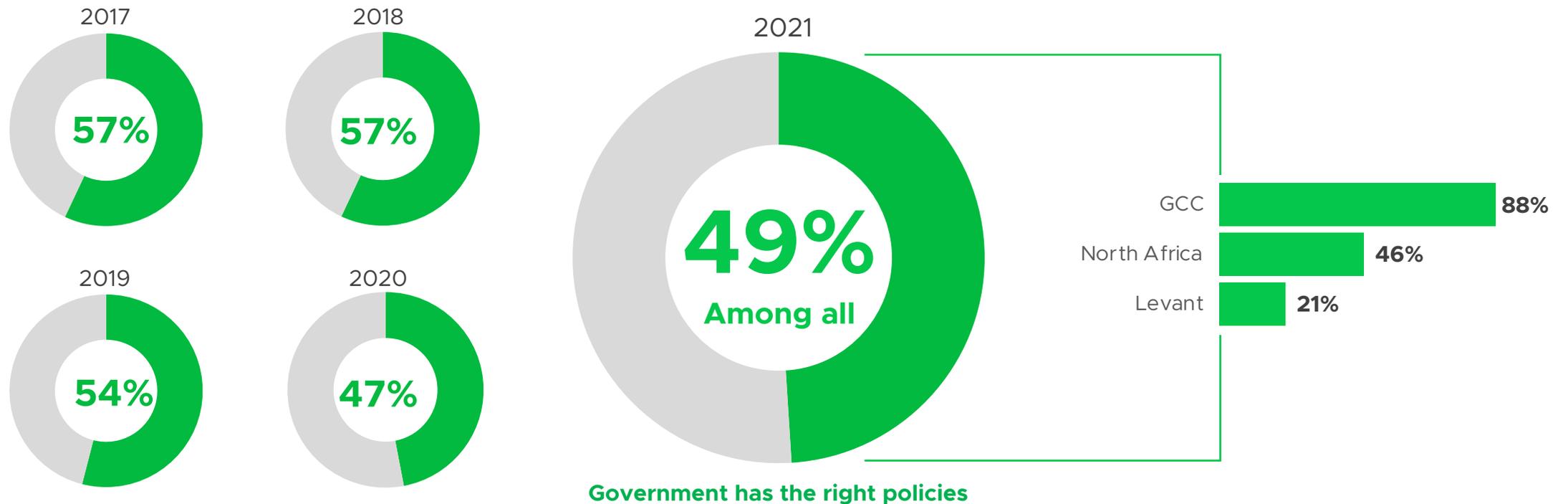
(Showing % saying 'Strongly agree' or 'Somewhat agree')



Almost half say their governments have the right policies to address their concerns

Do you think your government has the right policies to address the issues most important to young people?

(Showing % of 'Yes' their government have the right policies)

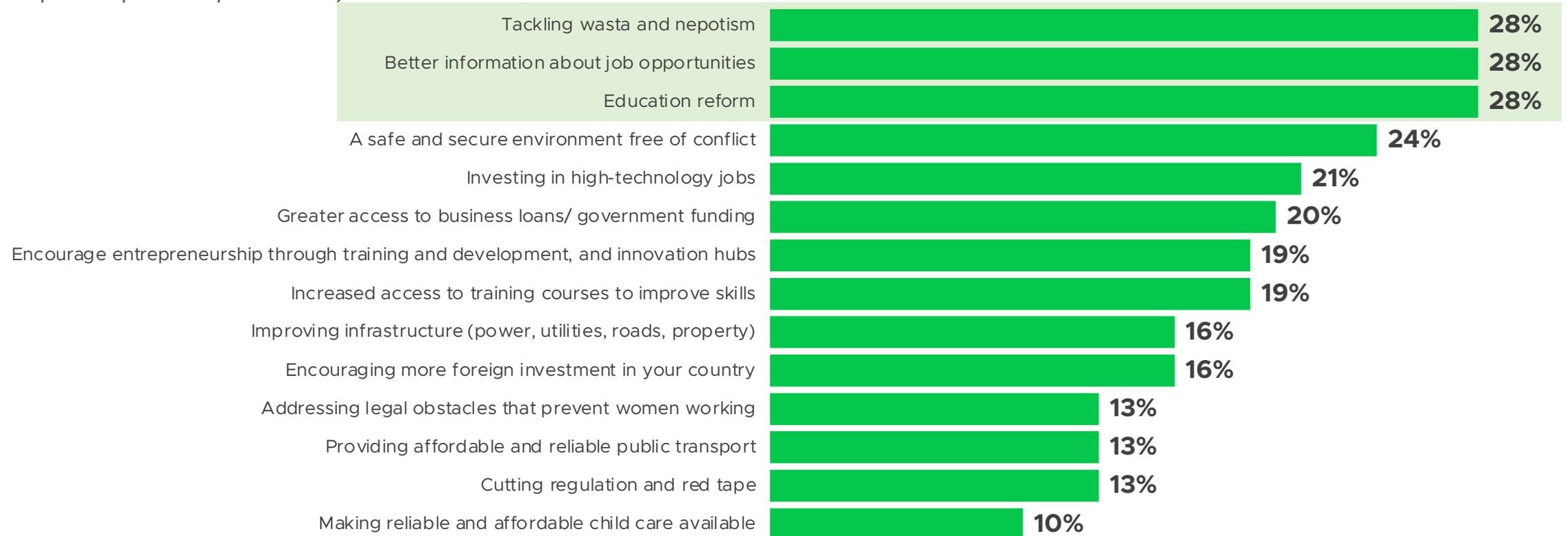


(Not including 'Don't know')

Young Arabs look to governments to tackle nepotism, provide better job information and reform education

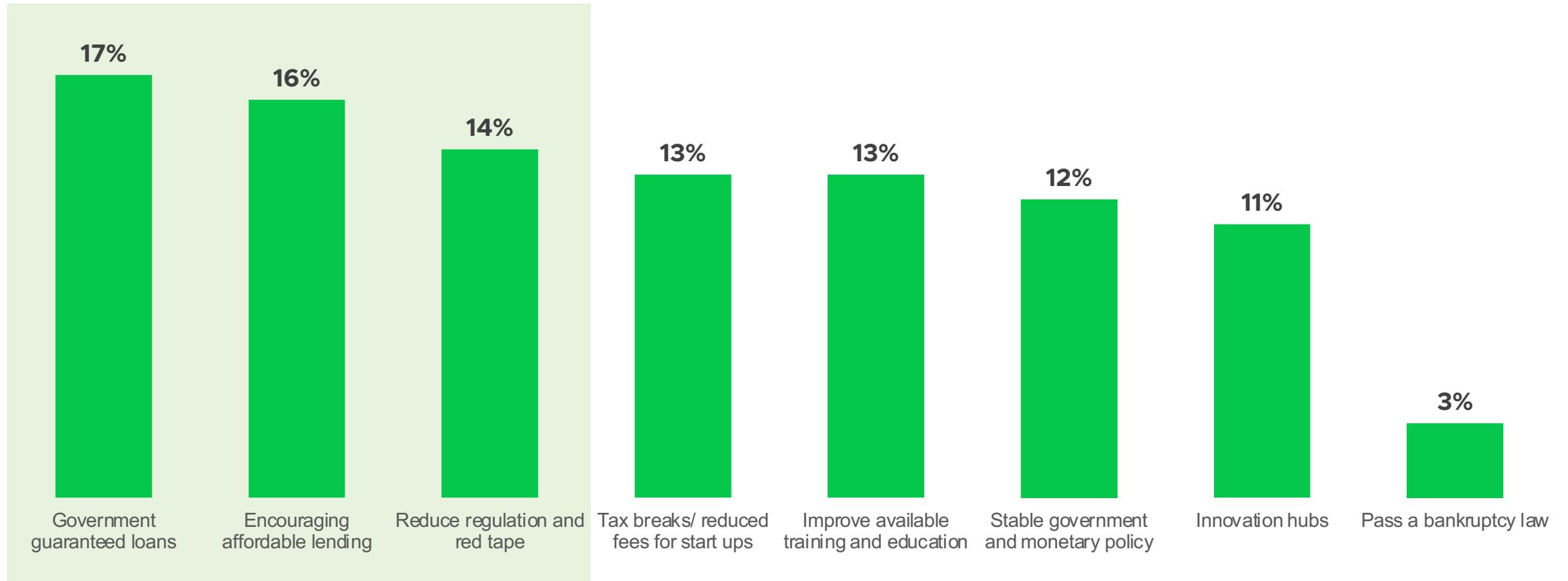
Now thinking specifically about jobs, which of the following, if any, should be your government's top priorities to create more jobs?

(Multiple responses permitted)



Arab youth expect more government support, affordable lending and reduced red tape to promote entrepreneurship

What should your government do to promote entrepreneurship?



(Not including 'Don't know')

5

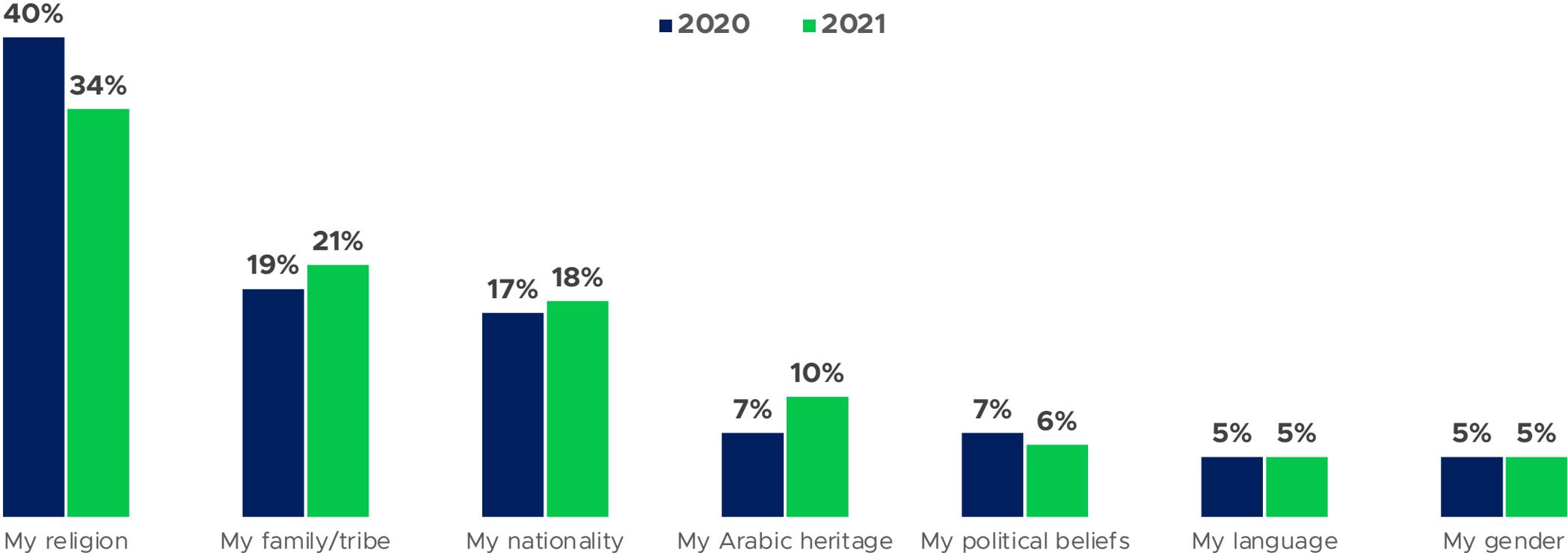
IDENTITY

Fewer young Arabs see religion as central to their identity while over two-thirds are looking for reform of religious institutions

Over one-third of young Arabs see religion as central to their identity while many others cite family/tribe and nationality



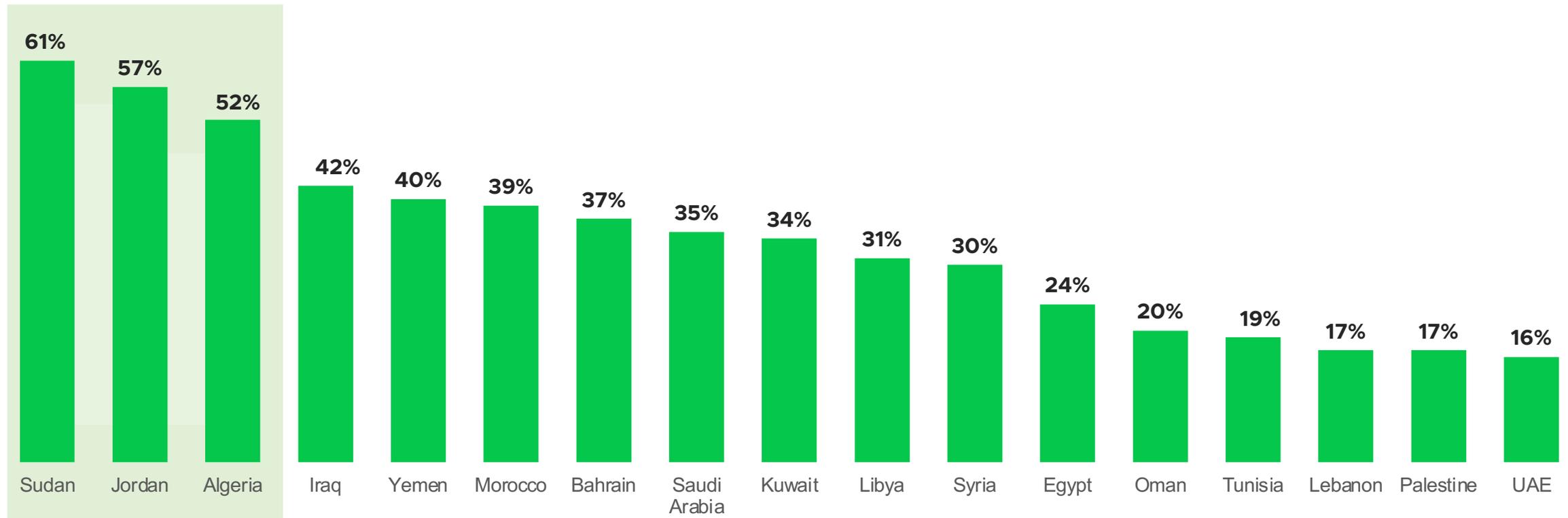
Which of the following is most important to your personal identity?



Youth in Sudan, Jordan and Algeria are particularly likely to see religion as central to their identity

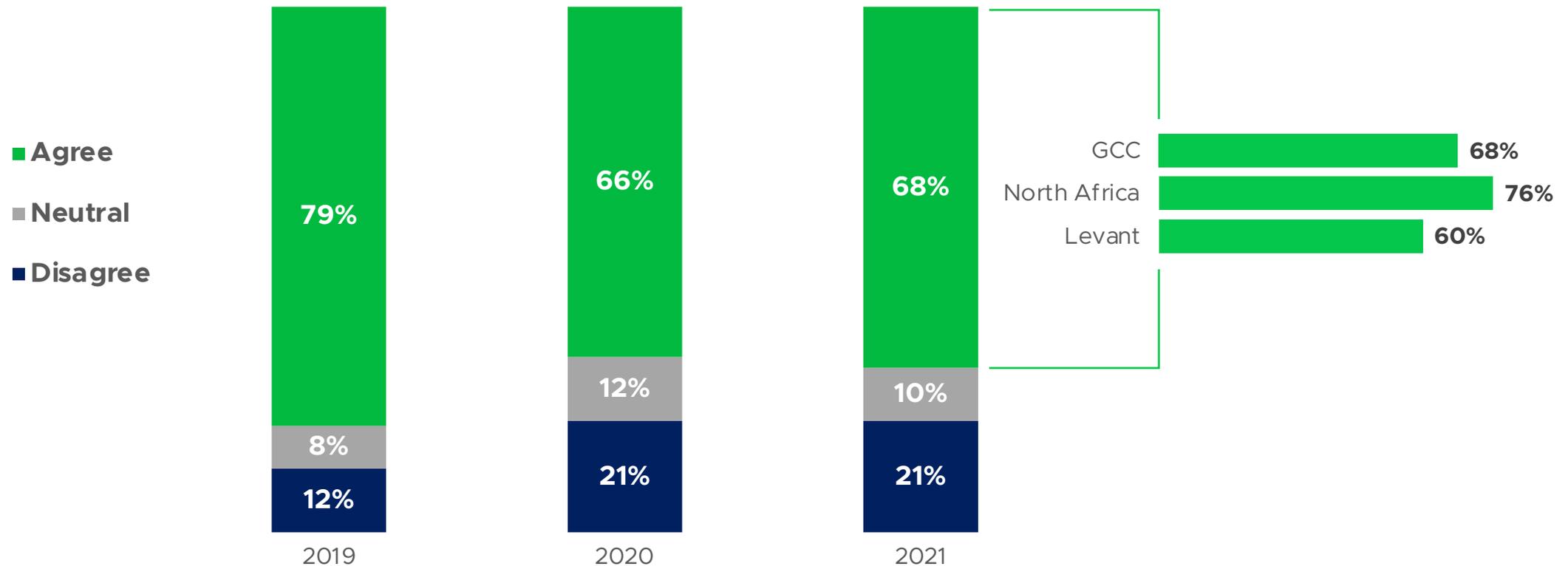
Which of the following is most important to your personal identity?

(Showing % saying '**Religion**')



Over two-thirds of Arab youth want their religious institutions to reform

How strongly do you agree or disagree that the Arab world needs to reform its religious institutions?

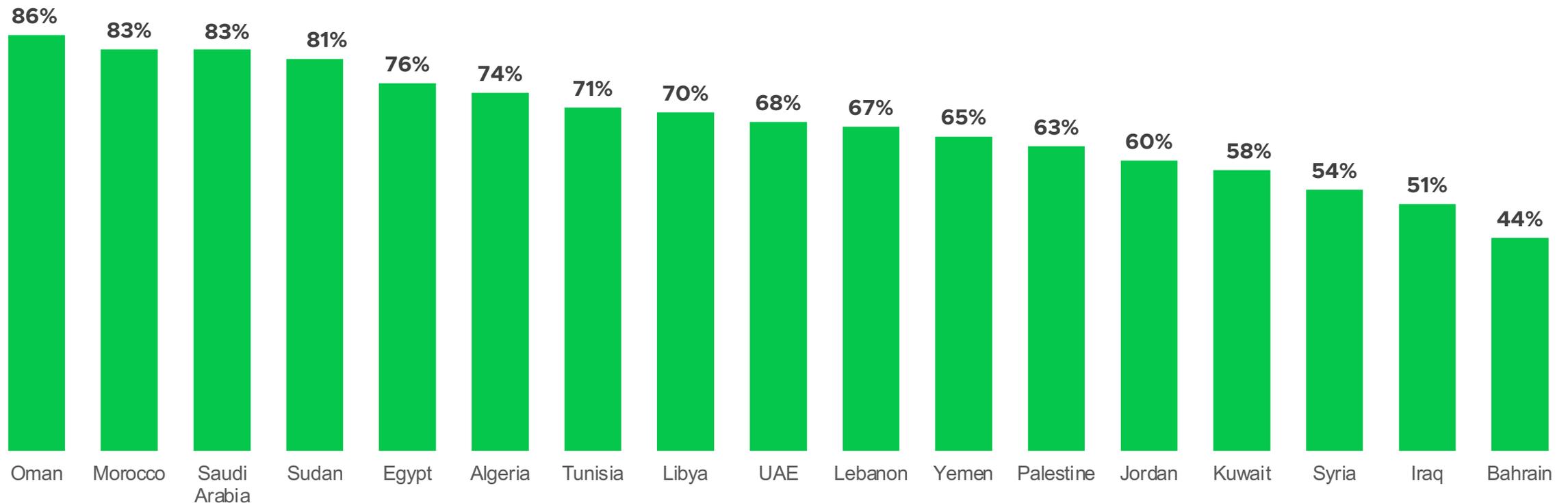


(Not including 'Don't know')

Youth in Oman, Morocco, Saudi Arabia and Sudan are most likely to believe their religious institutions need reform

How strongly do you agree or disagree that the Arab world needs to reform its religious institutions?

(Showing % saying 'Agree')



6

MODEL NATIONS

For the 10th consecutive year,
Arab youth name the UAE as the
country they would most like to live
in and their own country to emulate

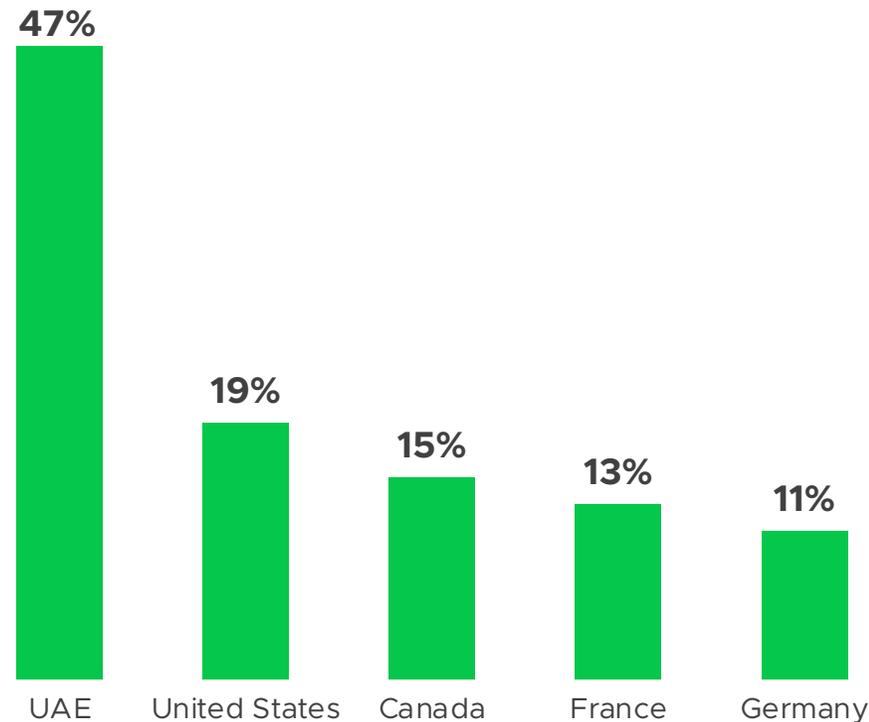


For the 10th consecutive year, the UAE is the country most Arab youth would like to live in



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

(Showing top five countries)

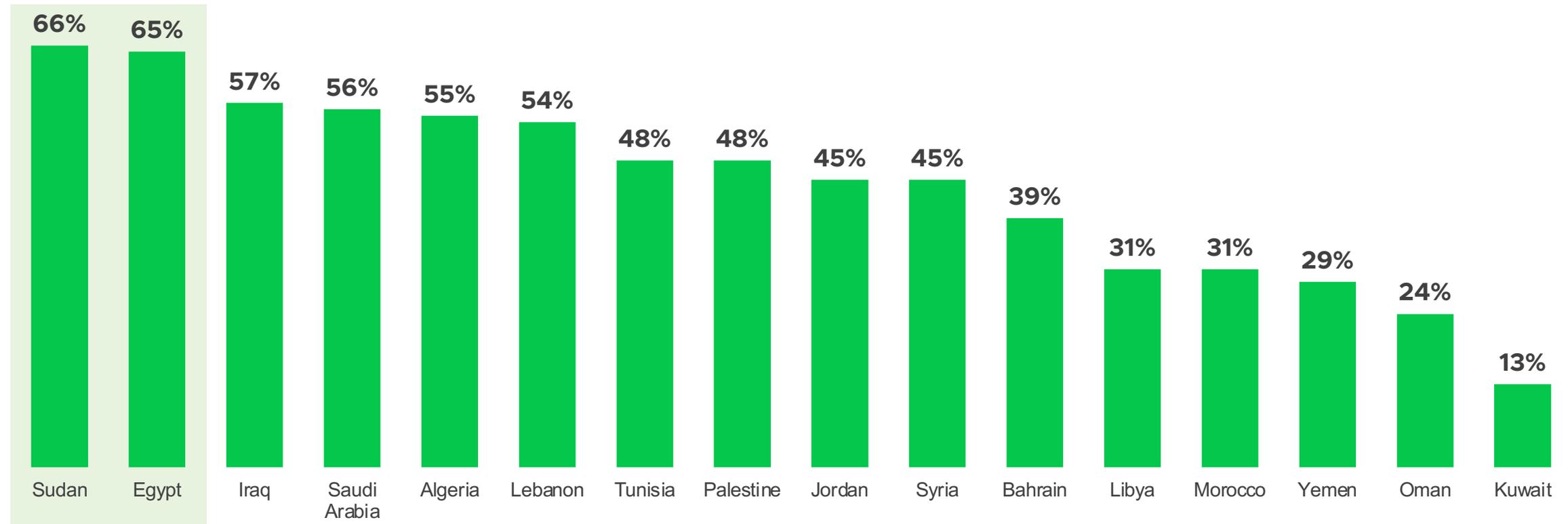


Top 5 Countries to Live In								
2012	2013	2014	2015	2016	2017	2018	2019	2020
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
France	France	US	US	US	US	Canada	Canada	US
US	US	UK	Germany	Germany	KSA	US	US	Canada
Turkey	Turkey	KSA	Canada	KSA	Canada	KSA	Turkey	UK
KSA	KSA	Qatar	Qatar	Canada	Germany	Germany	UK	Germany

Young Arabs from Sudan and Egypt are most likely to want to live in the UAE

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

(Showing % who answered 'UAE')*



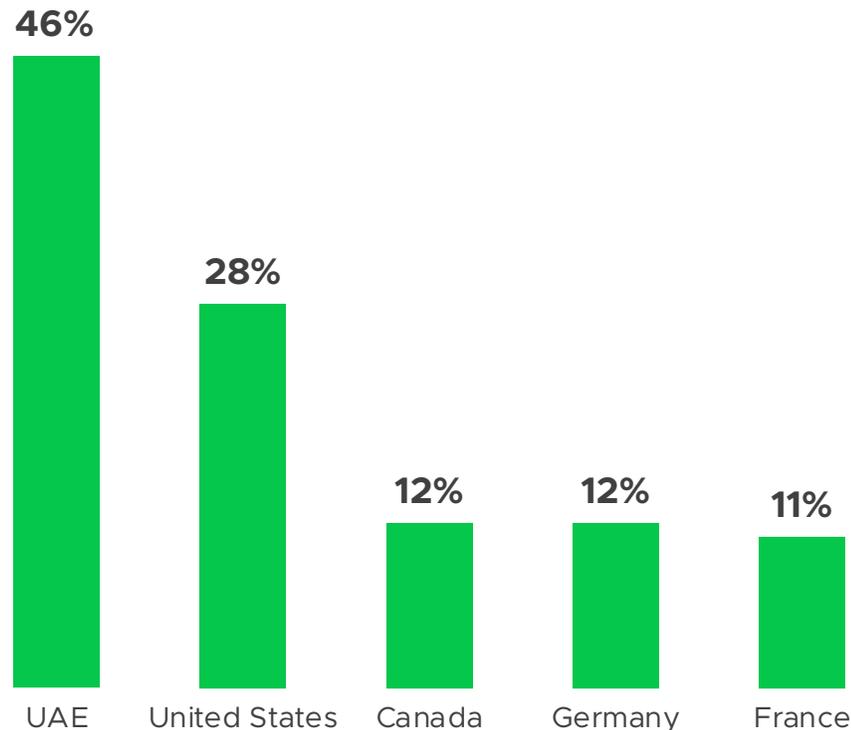
* Those living in the UAE are not included

The UAE is the nation most young Arabs want their own countries to emulate, also for the 10th successive year



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

(Showing top five countries)



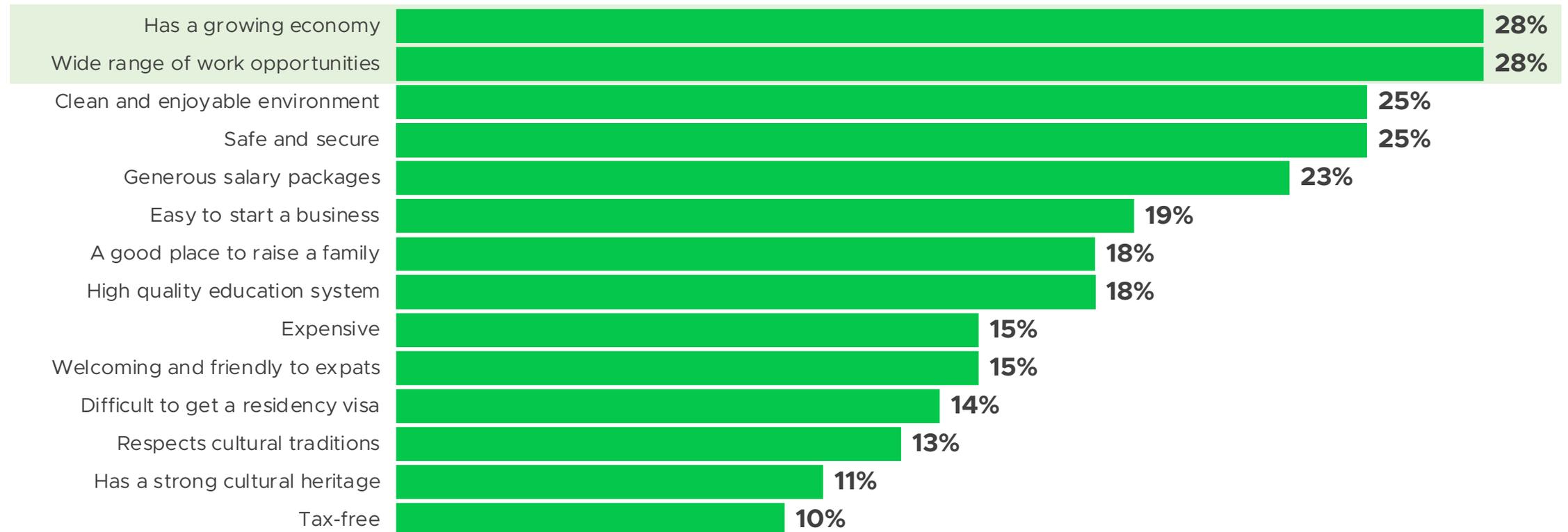
Top 5 Countries to Emulate								
2012	2013	2014	2015	2016	2017	2018	2019	2020
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
US	France	US	US	US	US	US	US	US
France	US	Qatar	Germany	Germany	Canada	Canada	Japan	Germany
Turkey	Turkey	KSA	Canada	France	Germany	Japan	Turkey	Canada
China	China	UK	France	UK	KSA	Germany	Canada	Japan

Arab youth most associate the UAE with its growing economy and range of work opportunities



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

(Multiple responses permitted)



7

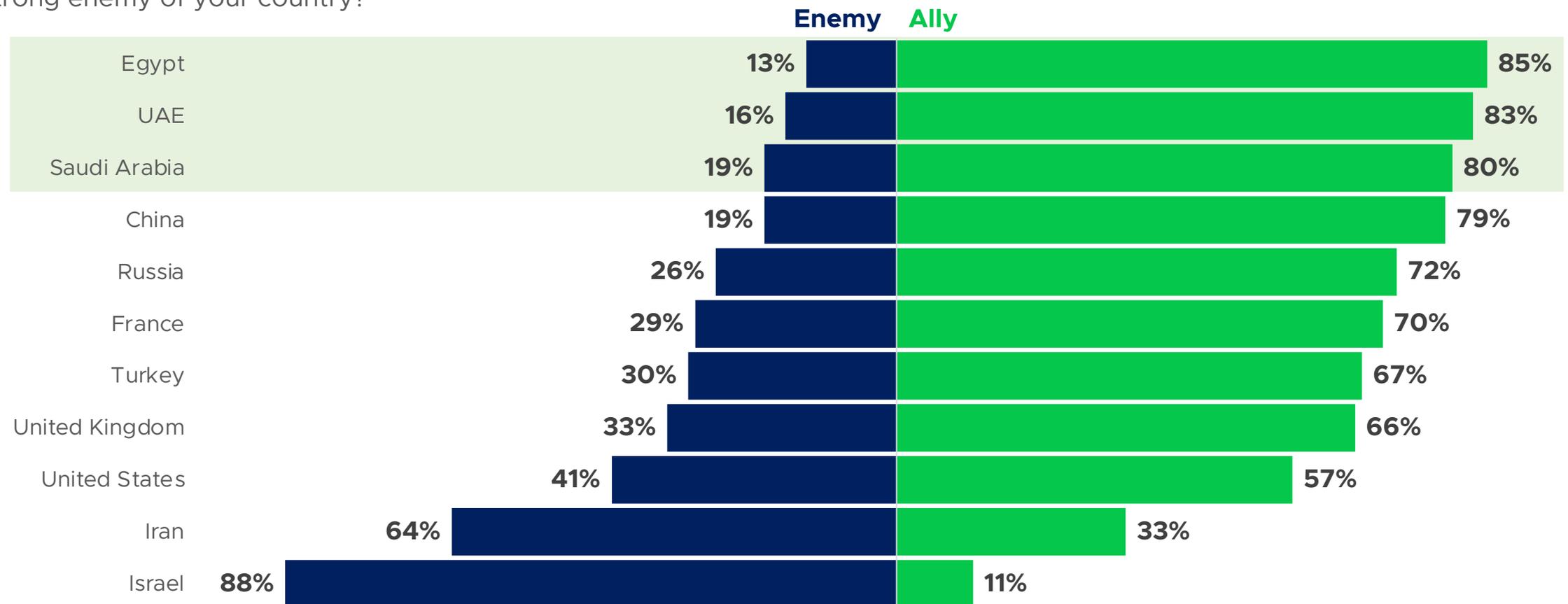
FOREIGN RELATIONS

Egypt, UAE and Saudi Arabia
are seen as top allies by young
Arabs, but the influence of the
US is felt widely

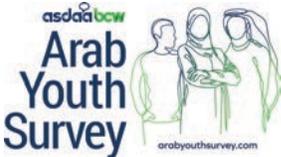
Arab Youth
Survey
arabyouthsurvey.com

Arab youth view Egypt, the UAE and Saudi Arabia as their strongest allies

Do you consider this country a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of your country?

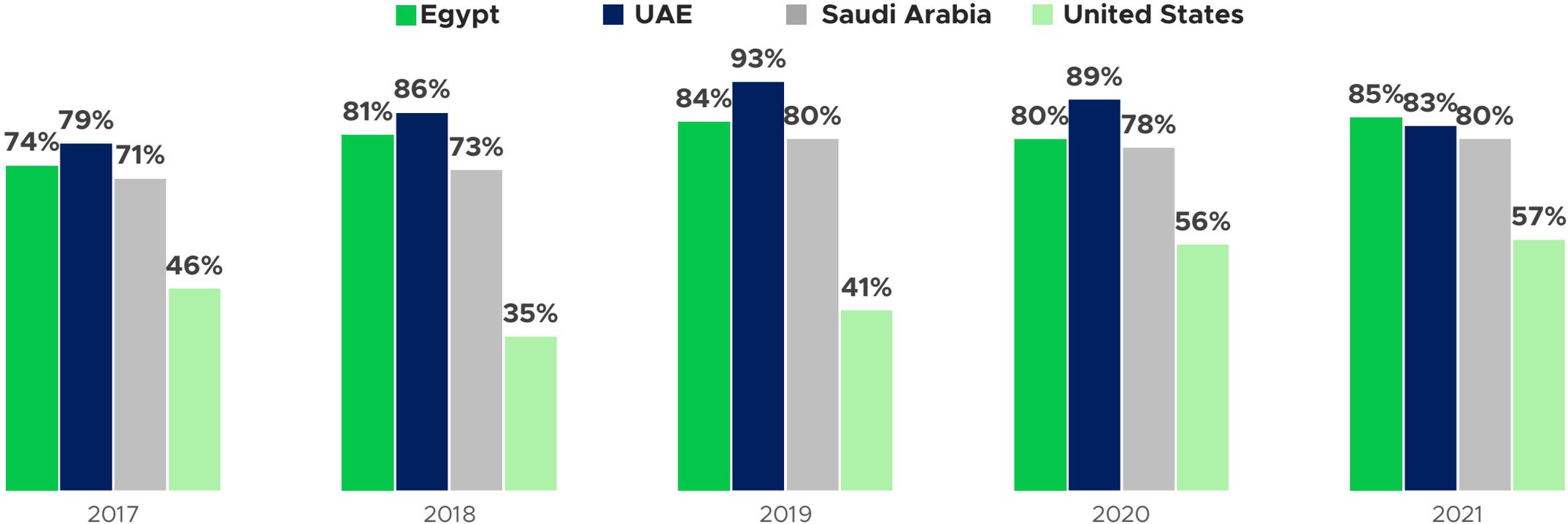


Egypt, the UAE and Saudi Arabia are important allies for Arab youth, and there has been little change in views of the US since Biden took office



Do you consider this country a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of your country?

(Showing % answering **'Strong ally'** or **'Somewhat of an ally'**)

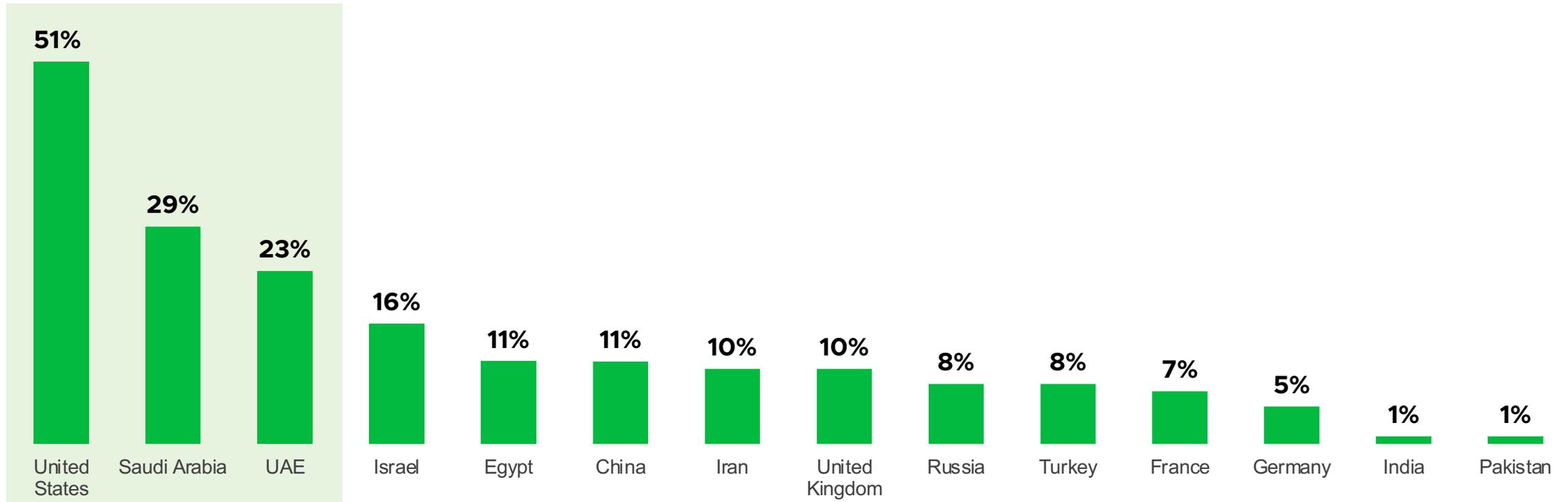


Young Arabs believe the country with the greatest influence in the region is the US, followed by Saudi Arabia and the UAE



Which of the following countries, if any, has the most influence on the Arab world?

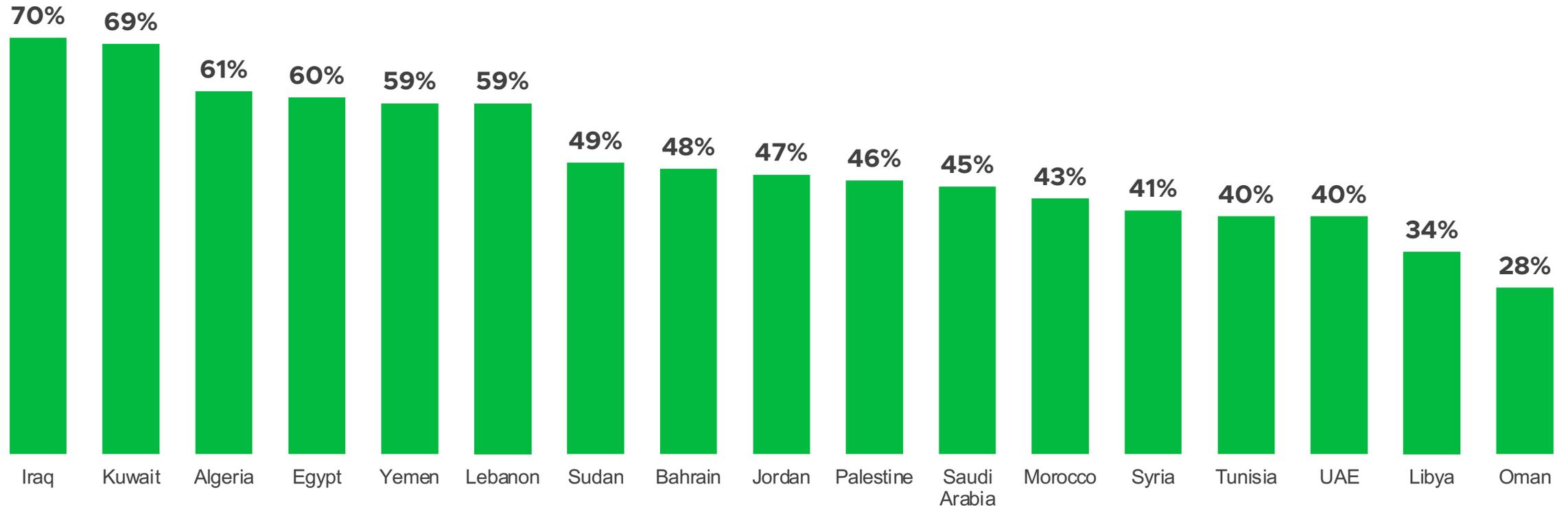
(Showing % answering **'Most influence'** or **'Second most influence'**)



The influence of the US is felt most in Iraq and Kuwait, followed by Algeria, Egypt, Yemen and Lebanon

Which of the following countries, if any, has the most influence on the Arab world?

(Showing % answering 'US' as having 'Most' or 'Second most' influence)



8

EMIGRATION

Fewer young Arabs now
consider emigration despite
ongoing economic challenges
in their countries

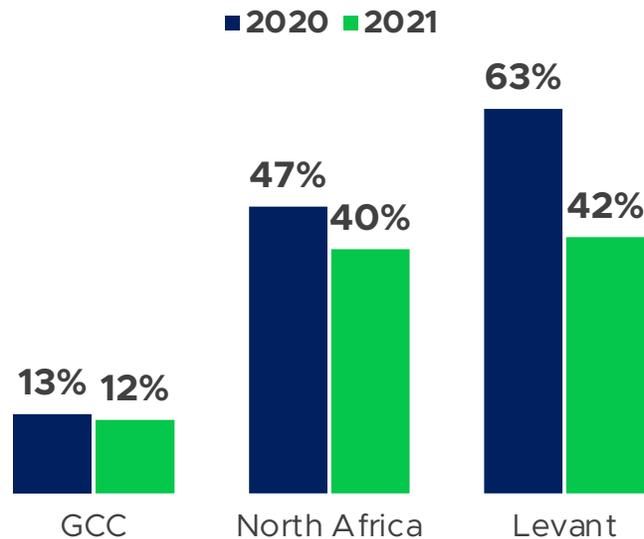
The number of young Arabs considering emigration has decreased since 2020

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



33% want to / have considered to emigrate compared to 42% in 2020

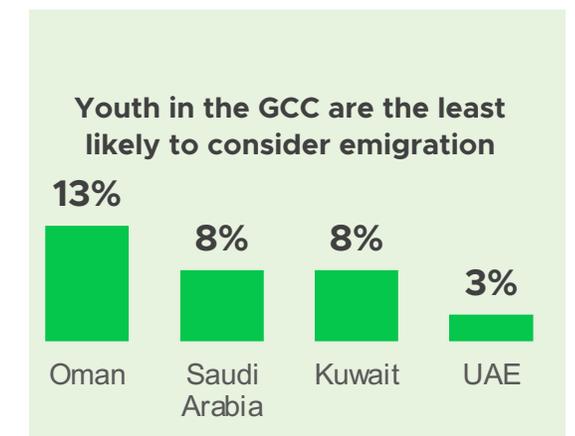
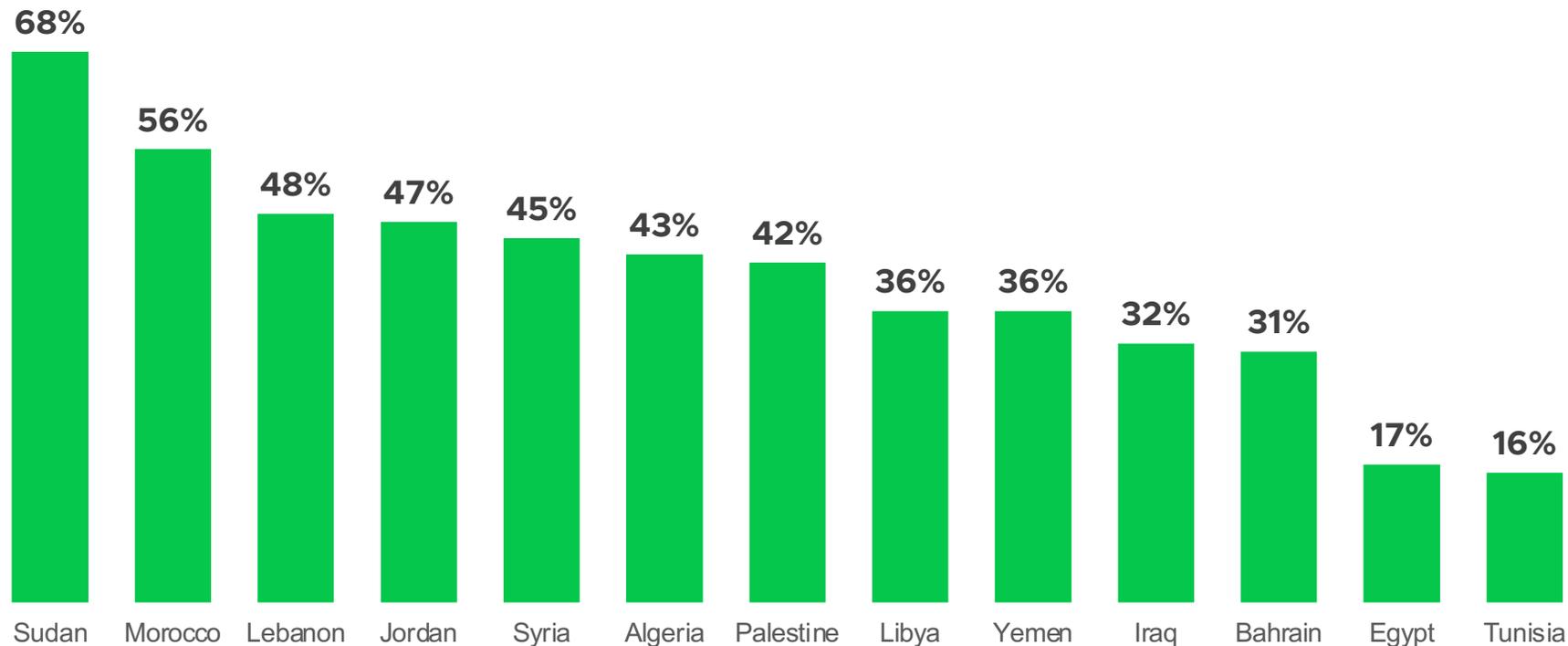
- I am actively trying to emigrate to another country
- I have considered emigrating to another country, but I am not actively trying to leave
- I have not considered emigrating to another country, but could do so in the future
- I would never leave my country



Young Arabs in North Africa and Levant are most likely to consider emigration

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

(Showing % based on **'actively trying'** or **'considered'** emigrating to another country)



Young Arabs are most likely to want to emigrate to Canada and the United States

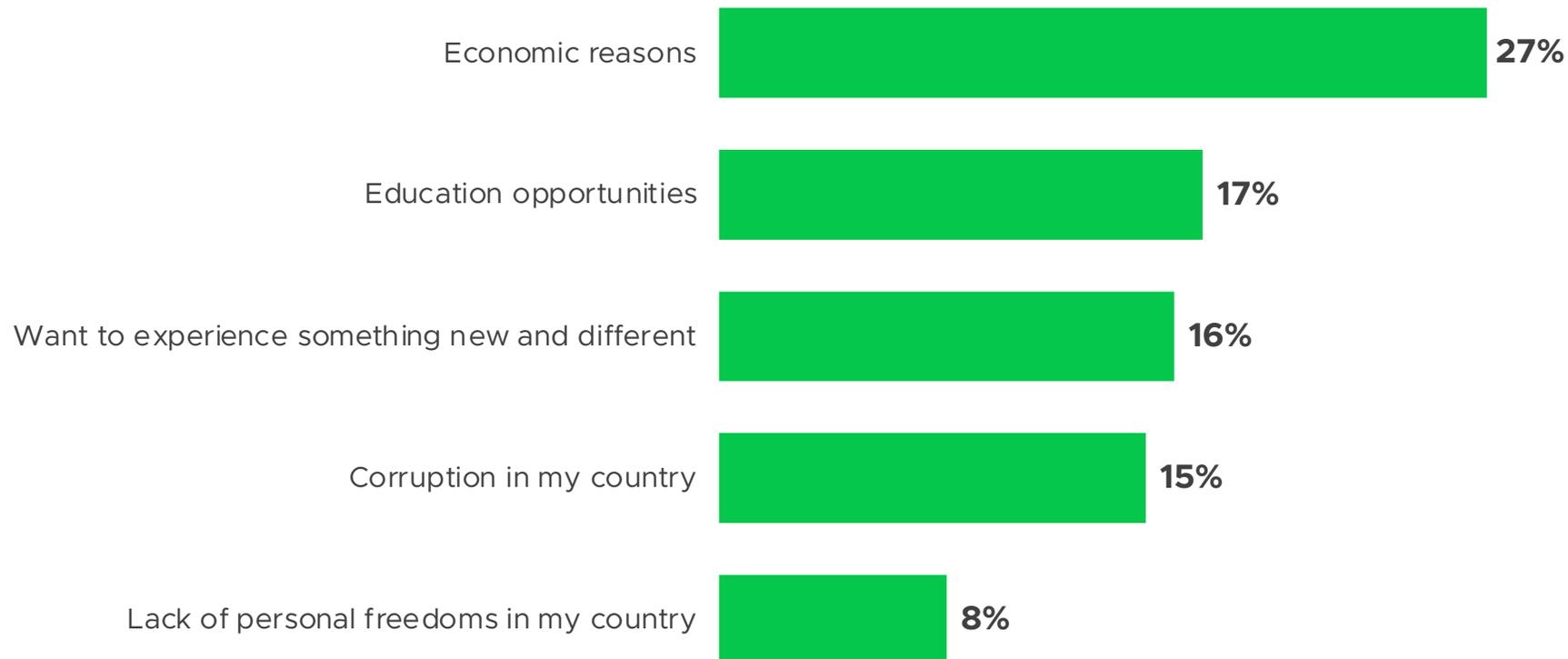
If you were to emigrate to another country, which country in the world would you be most likely to move to?
(Showing % among youth **'Actively trying to emigrate'** or **'Have considered emigrating'**, showing top five)



Economic factors and education opportunities drive 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'** or **'Have considered emigrating'**, showing top five)



9

GENDER RIGHTS

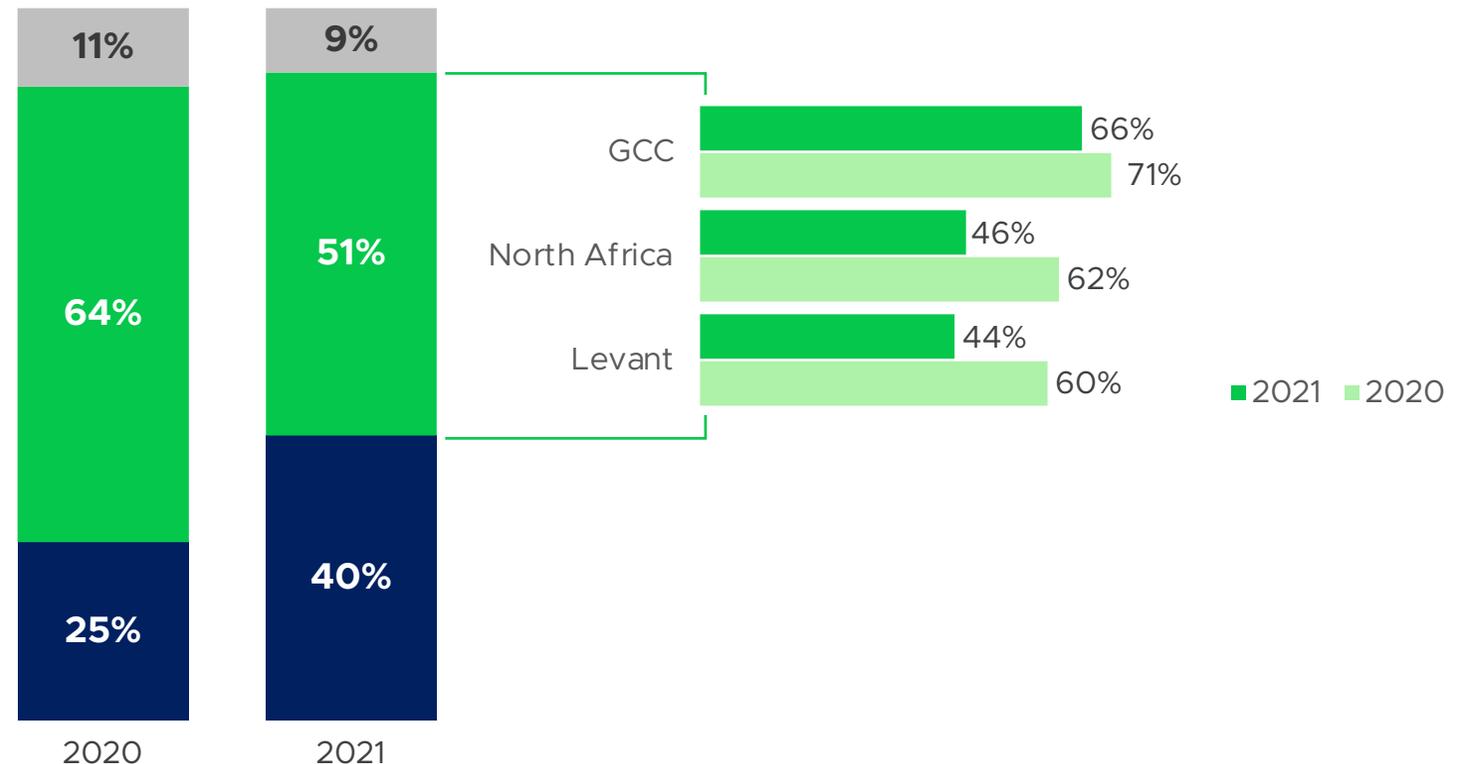
Young Arab women point to a fall in gender equality across the region

The number of young Arab women saying they have the same rights as men has fallen across the region over 2020

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

(Among women)

- Women have more rights than men
- Men and women have the same rights
- Men have more rights than women



Less young Arab women believe they have equal access to employment opportunities than last year



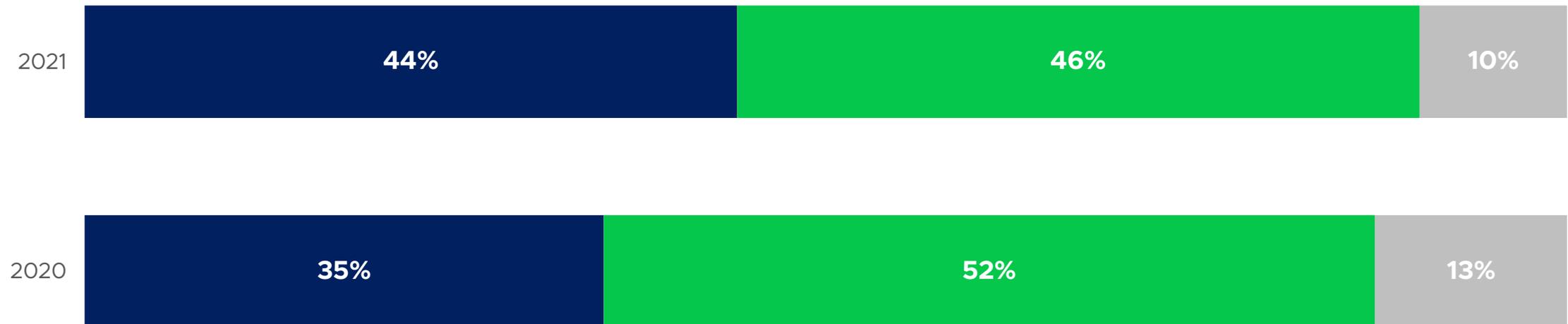
Which of the following is closer to your opinion? In my country ...

(Among women)

■ Men have better professional opportunities/jobs than women

■ Men and women have the same professional opportunities/jobs

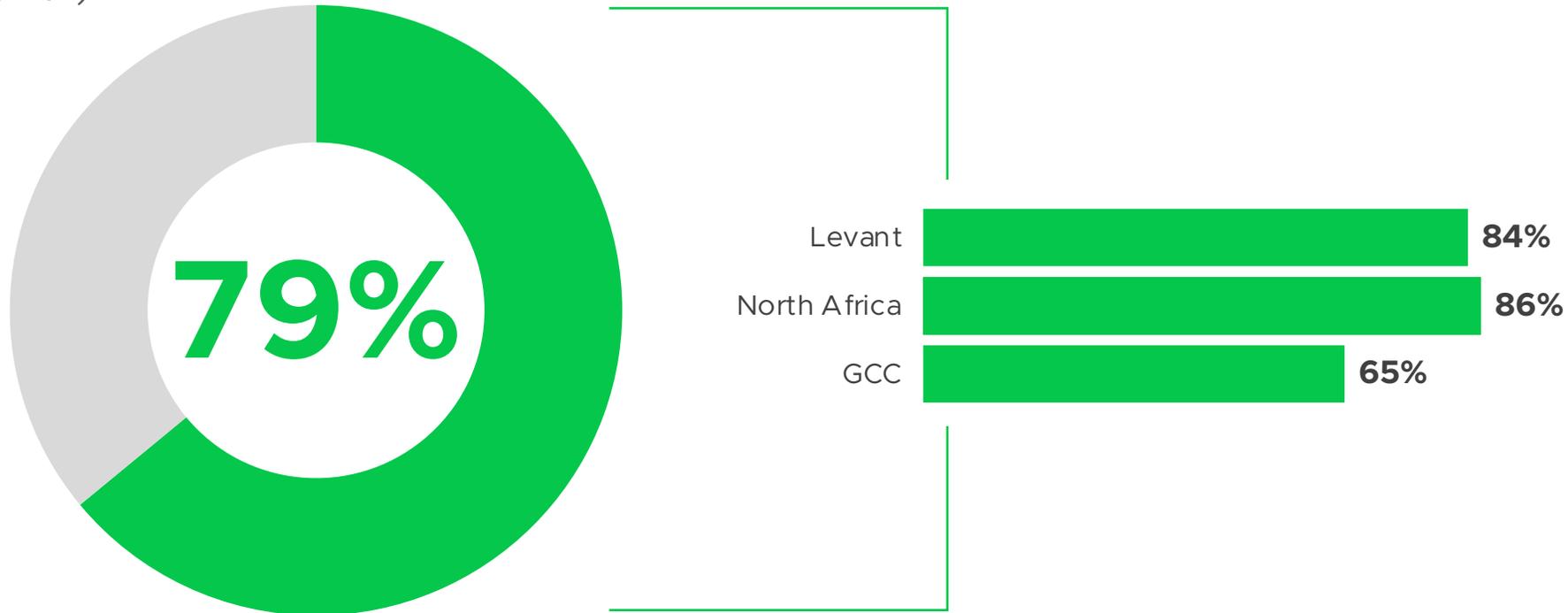
■ Women have better professional opportunities/jobs than men



Two thirds of young Arab women are concerned about the lack of opportunities to join the workforce

How concerned would you say you are about each of the following issues?

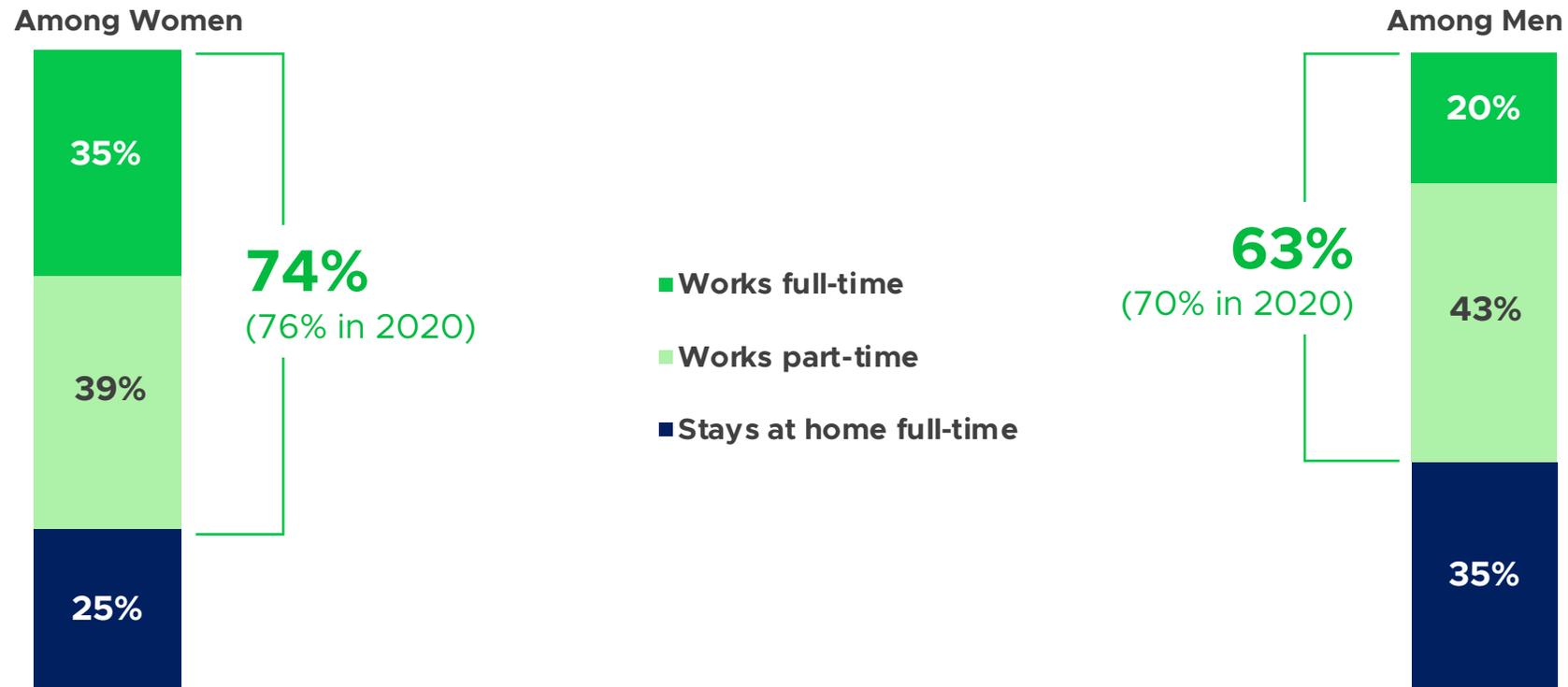
(Among women)



**Concerned about the lack of opportunities
for women to join the workforce**

Young Arab women and men say 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



(Not including 'Don't know')

10

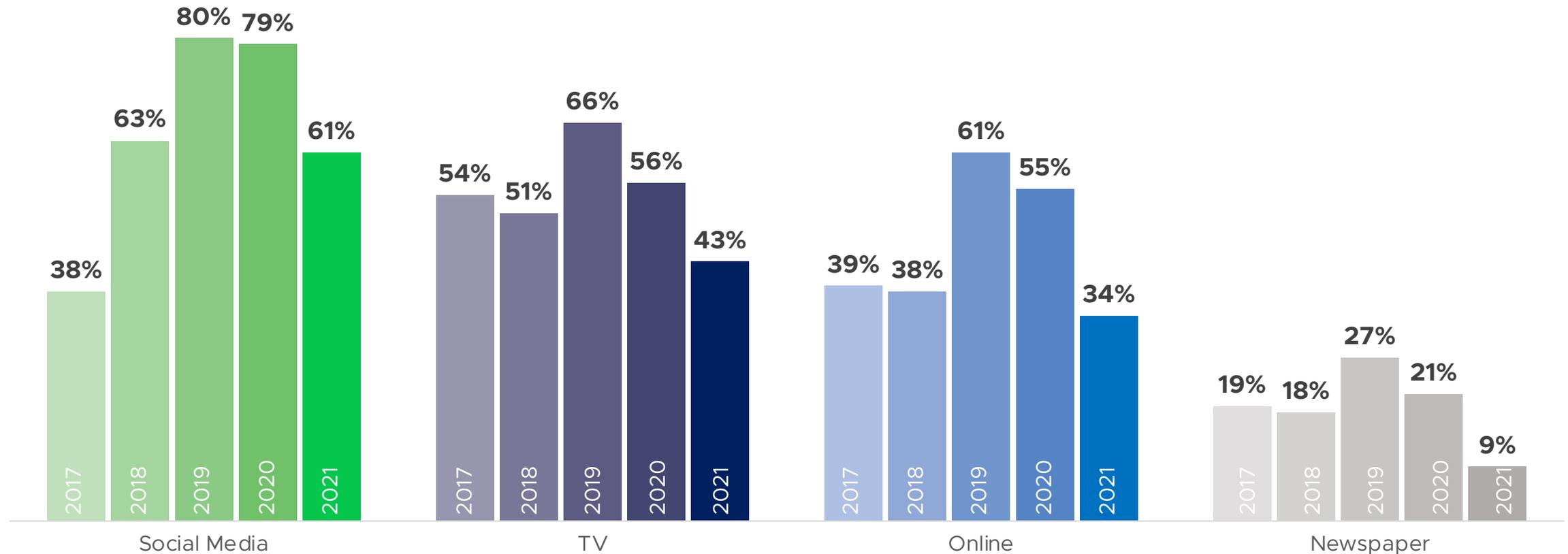
MEDIA CONSUMPTION

Social media is by far the largest source of news among young Arabs, but TV is more trusted



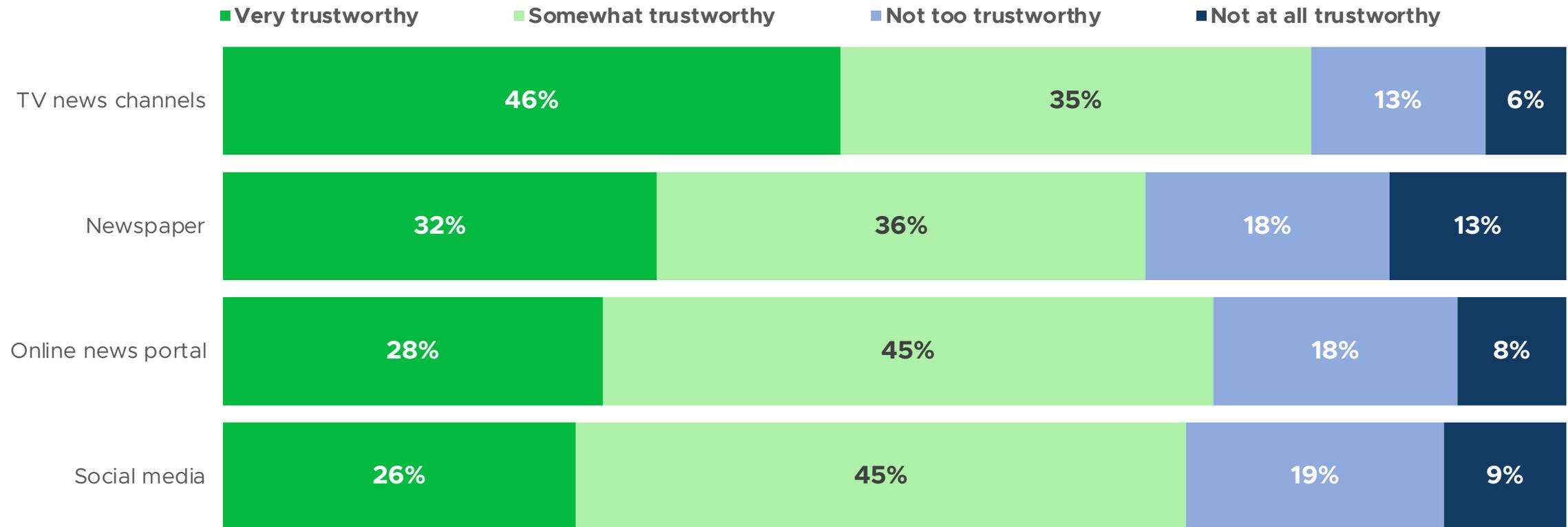
Social media is by far the largest source of news for young Arabs

Where do you get your news?



Social media is less trusted than TV, newspapers, and online news portals

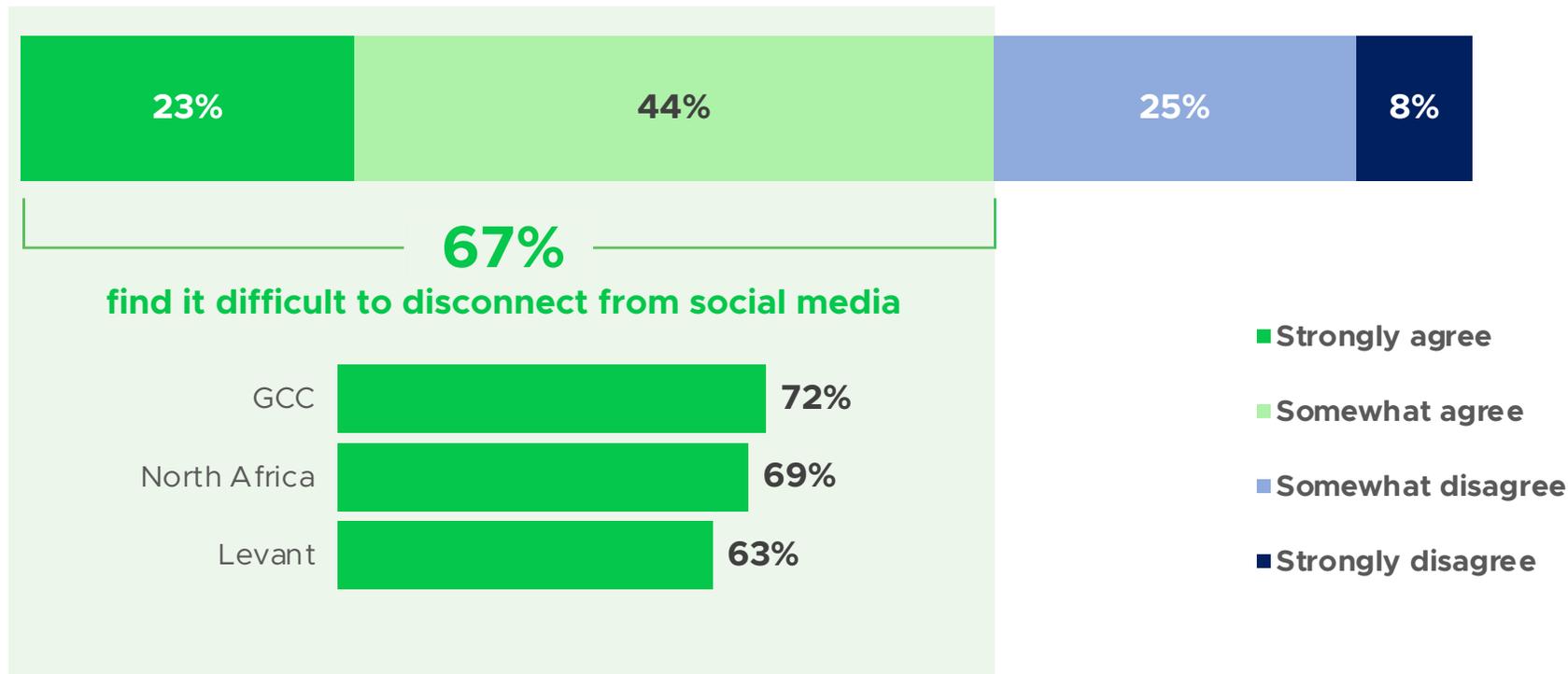
How trustworthy do you think is each of the following is as a source of news?



(Not including 'Don't know')

Two thirds of Arab youth find it difficult to disconnect from social media

Do you agree or disagree with the following statement: I often find it difficult to disconnect from social media

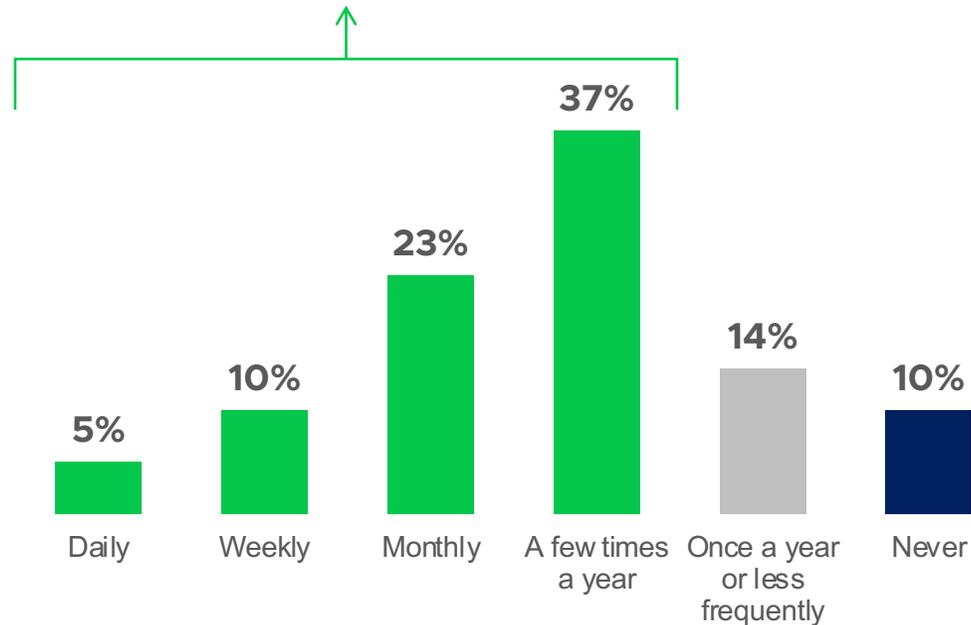


More than a quarter of young Arabs shop frequently online and food is most purchased product



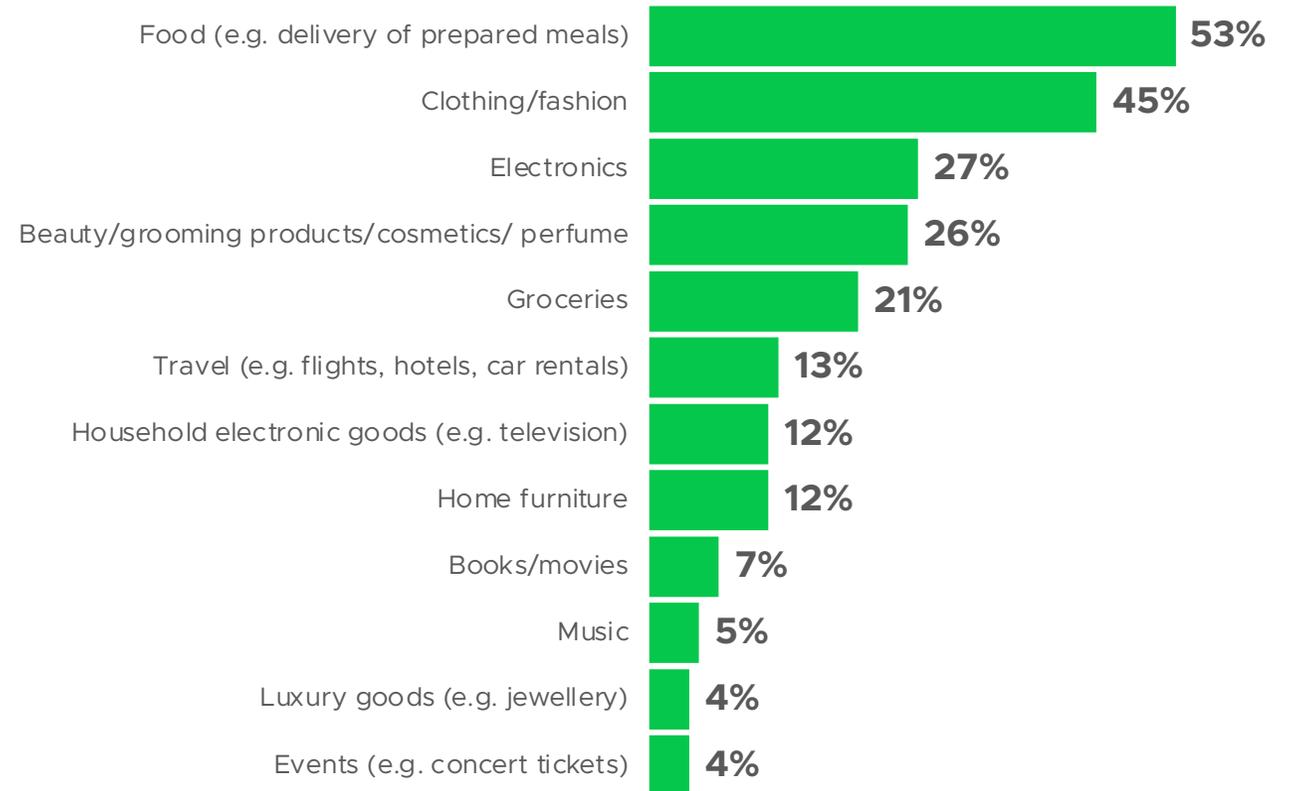
How frequently, if at all, do you purchase products or services online via an app or website?

75% of Arab youth have purchased a product or service online in the last year

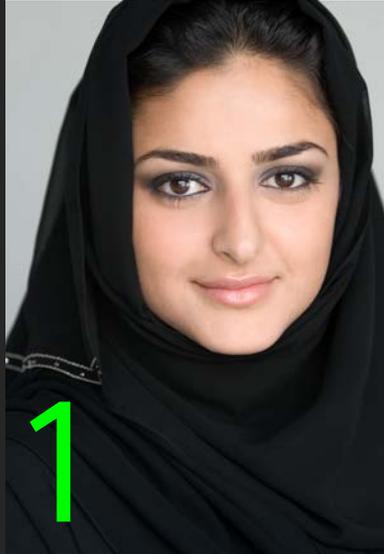


(Not including 'Don't know')

Which of the following products or services, if any, have you purchased online in the past year?



TOP FINDINGS



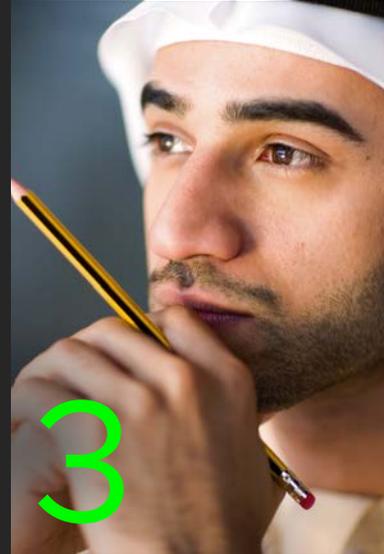
OUTLOOK

Despite the pandemic, ongoing conflicts and record economic decline, most Arab youth are optimistic that their best days lie ahead of them



OBSTACLES

Rising cost of living and other 'kitchen table' issues are seen as top obstacles, as over a third of young Arabs struggle to make ends meet



EDUCATION & JOBS

With difficulties in accessing quality education and getting jobs, more young Arabs are turning to entrepreneurship



ROLE OF GOVERNMENT

Young Arabs say their voice matters to their leadership and expect governments to tackle nepotism and promote youth entrepreneurship



IDENTITY

Fewer young Arabs see religion as central to their identity while over two-thirds are looking for reform of religious institutions

TOP FINDINGS



MODEL NATIONS

For the 10th consecutive year, Arab youth name the UAE as the country they would most like to live in and their own country to emulate



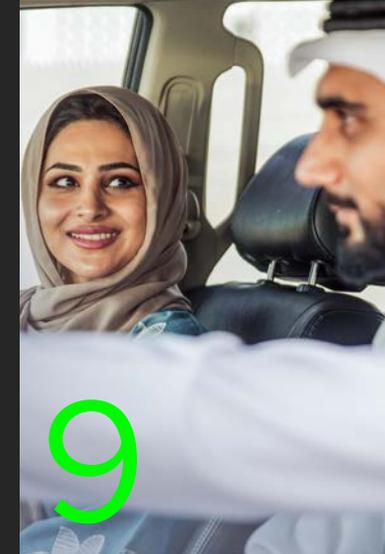
FOREIGN RELATIONS

Egypt, UAE and Saudi Arabia are seen as top allies by young Arabs, but the influence of the US is felt widely



EMIGRATION

Fewer young Arabs now consider emigration despite ongoing economic challenges in their countries



GENDER RIGHTS

Young Arab women point to a fall in gender equality across the region



MEDIA CONSUMPTION

Social media is by far the largest source of news among young Arabs, but TV is more trusted

Private & Confidential



13th Annual Edition 2021

HOPE FOR THE FUTURE

arabyouthsurvey.com

asdaa-bcw.com

bcw-global.com