

# HOPE FOR THE FUTURE



13<sup>th</sup> Annual Edition 2021

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13<sup>th</sup> Annual Edition 2021

# HOPE FOR THE FUTURE

A White Paper on the findings of the 13th annual ASDA'A BCW Arab Youth Survey

Published in 2021 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](http://arabyouthsurvey.com)

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The ASDA'A BCW  
Arab Youth Survey  
2021 is dedicated  
to the Arab  
world's over 200  
million youth.

**Special thanks to:**

PSB Insights 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.



## Commentaries



### Optimistic young Arabs mark the prospect of generational progress

Faisal Al Yafai

Journalist and partner at Hildebrand Nord, United Kingdom



### A better future through better policies

Dr. Jihad Azour

Director of the International Monetary Fund's Middle East and Central Asia Department, Washington, D.C.



### An invigorated identity for Arab youth

H.E. Yousef Al Otaiba

Ambassador of the UAE to the United States and UAE Minister of State



### Young Arabs and the UAE Model: An enduring aspiration

Afshin Molavi

Senior Fellow at the Foreign Policy Institute of the Johns Hopkins University School of Advanced International Studies, Washington, D.C.



### The emerging US-China rivalry will add a new dynamic to regional foreign policy

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'



### Drop in desire to emigrate is a vote of confidence for the region

Hussein Ibish

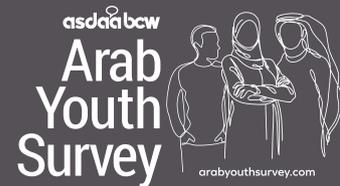
Senior Resident Scholar at the Arab Gulf States Institute in Washington



### Arab women believe Gulf societies should modernise, rather than westernise

Khaled Almaeena

Veteran Saudi editor, commentator and the former editor-in-chief of Arab News and Saudi Gazette



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

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# ‘Hope for the future’ is a strong call to action by Arab youth



Sunil John

Sunil John is the President - Middle East and North Africa (MENA) of BCW (Burson Cohn & Wolfe), a top-three global communications consultancy and part of WPP (NYSE: WPP). He is the Founder of ASDA'A BCW, the region's leading PR consultancy. He also leads GCI Health Middle East, a specialist healthcare consultancy, Proof Communications, a specialist digital and design firm, and PSB Insights Middle East, which offers research-based consultancy. All three are wholly owned subsidiaries of ASDA'A BCW.

Earlier this year, on International Youth Day, His Highness Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, proclaimed that the future was in the hands of our young people.

As we digest the findings of this year's annual ASDA'A BCW Arab Youth Survey, we are reminded of the simple truth behind those words. The long-term prosperity, security and well-being of the Middle East and North Africa (MENA) region, with 60% of the population below the age of 30, depends on our young people, at a time when the stakes could not be higher.

**The message of Arab youth is therefore not hard to divine. Decision makers across the MENA region can harness the positive energy of their young people to build fairer, more inclusive, more prosperous, and more sustainable societies for all. Our young citizens will be committed partners in that effort.**

With the world struggling to reboot itself after the ravages of the COVID-19 pandemic, and as the threat of irreversible climate change edges nearer, it will be the unenviable task of today's young adults,

our future leaders, to chart a course towards a more sustainable economic and social order.

And although it is tempting to dismiss the exalted notions of our young people, who, as Aristotle said, have not been humbled by life or learned its necessary limitations, it is hard to ignore the resilience and optimism of youth across MENA revealed by this year's survey.

Despite the global fall-out of COVID-19, economic turmoil in several countries, and intractable military conflicts in Yemen and parts of the Levant, nearly two-thirds (60%) of 18- to 24-year-olds believe their best days lie ahead of them – the highest level in five years.

What is more, almost half of young Arabs (48%) say they are confident that they will lead a better life than their parents – the highest percentage expressing this sentiment for three years.

We last observed such optimism in our 2013 survey, when nearly three-quarters (74%) of young Arabs, including those in the Gulf Cooperation Council (GCC) states, the Levant and North Africa, said their best days lay ahead.

The message of Arab youth is therefore not hard to divine. Decision makers across the MENA region can harness the positive energy of their young people to build fairer, more inclusive, more prosperous, and more sustainable societies for all. Our young citizens will be committed partners in that effort.

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**At ASDA'A BCW, we have been proud to help amplify the voice of Arab youth down the years, from our first survey of nine countries in 2008, to the 17 Arab states we polled this year. While shining a light on the region's many challenges, this year's survey once again highlighted the Arab world's many untapped opportunities. It is incumbent upon all decision makers to help their young citizens seize them with both hands.**

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However, it is a fleeting opportunity. Notwithstanding the hopefulness for the future of Arab youth in nearly all the 17 states surveyed, serious concerns persist across the region about the rising cost of living, the quality of education and unemployment. A third of the participants in our survey said either they or a family member had lost their job at the height of the pandemic – and most of those who were made redundant have yet to find new employment.

Youth concerns over education are also widespread, with more than eight in 10 young men and women saying they are 'very concerned' or 'somewhat concerned' about the quality of education in their home country; this is true of young Arabs in North Africa, the Levant, and even the GCC states. If, as they say, the fate of empires depends on the education of youth, decision makers in the region have much to ponder.

This year, as in the previous nine years, Arab youth are emphatic that they want their own country to emulate the UAE, and the country in the world they most want to live in. This will undoubtedly be a source of pride to the UAE as it celebrates its half-centennial and welcomes the world to Expo 2020 in Dubai.

However, all countries can at least draw some positives from this year's findings, including the strong support among Saudi youth for their country's handling of the COVID-19 pandemic.

The perceptions and attitudes of young Arabs towards other nations also point to changes on the ground. China has emerged as the top non-Arab ally of their nations, according to a large majority (79%) of Arab youth. With the US retreating from the region to focus on domestic affairs, this will bring a new dynamic to the region's foreign policy.

The survey findings reveal that young people across MENA are being listened to, with a majority in every part of the region saying their voice matters to their country's leadership.

At ASDA'A BCW, we have been proud to help amplify that voice down the years, from our first survey of nine countries in 2008, to the 17 Arab states we polled from June 6 to 30, 2021. We do this for two reasons.

Firstly, to provide free evidence-based insights into what motivates the region's largest demographic, its 200 million-plus young people, to government, the private sector, civil society and the general public.

And secondly, to demonstrate our own commitment to the communications industry, whose value to clients of all descriptions in the MENA region significantly depends on its understanding of tomorrow's leaders.

Accordingly, the annual ASDA'A BCW Arab Youth Survey is entirely self-funded, and over the last 13 years, we have built a growing library of insights accessible to all.

This year, field researchers of PSB Insights conducted face-to-face interviews with 3,400 Arab men and women aged 18 to 24 on topics as diverse as jobs and economic policy, COVID-19, education, gender, personal identity, and foreign relations.

While shining a light on the region's many challenges, this year's survey once again highlighted the Arab world's many untapped opportunities. It is incumbent upon all decision makers to help their young citizens seize them with both hands.

## About the 13th annual ASDA'A BCW Arab Youth Survey 2021

The annual ASDA'A BCW Arab Youth Survey, launched in 2008, is the largest survey of its kind of the Middle East and North Africa (MENA) region, covering its largest demographic – its youth. The findings of the survey provide governments, the private sector, civil society and academia with insights into the hopes, concerns and aspirations of Arab youth. For the 13th annual ASDA'A BCW Arab Youth Survey 2021, PSB Insights, a global strategic research and analytics consultancy, conducted face-to-face interviews with 3,400 young Arabs, aged 18 to 24, across 50 cities and territories in 17 Arab states from June 6 to June 30, 2021.



### 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



## Methodology

PSB Insights conducted 3,400 face-to-face interviews from June 6 to June 30, 2021. 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:

UAE	Oman	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon
<b>N=200 per country</b>							
Dubai (40%)	Muscat (50%)	Manama (100%)	Jeddah (40%)	Kuwait City (20%)	Cairo (50%)	Amman (50%)	Saida (20%)
Sharjah (20%)			Riyadh (40%)	Al Hawalli (30%)	Alexandria (25%)	Irbid (25%)	Beirut (60%)
Abu Dhabi (40%)	Batinah (50%)		Dammam (20%)	Al Ahmadi (20%) Al Farwaniya (30%)	Mansoura (25%)	Zarqa (25%)	Tripoli (20%)

Iraq	Tunisia	Libya	Algeria	Morocco	Yemen	Palestinian Territories	Syria	Sudan
<b>N=200 per country</b>								
Baghdad (50%)	Tunis (50%)	Tripoli (50%)	Algiers (50%)	Casablanca (25%)	Sanaa (50%)	Gaza (50%)	Damascus (50%)	Khartoum (50%)
Irbil (25%)	Safaqis (25%)	Misrata (25%)	Oran (25%)	Fes (25%)	Al Hudaydah (25%)		Latakia (25%)	Port Sudan (25%)
Basrah (25%)	Susah (25%)	Benghazi (25%)	Constantine (25%)	Rabat (25%) Marrakech (25%)	Ta'izz (25%)	West Bank (50%)	Aleppo (13%) Homs (12%)	Al Obeid (25%)

*Countries and gender were weighted equally.*

### Special note

For comparative purposes, data from the 2020 survey is used throughout this report. Interviews were conducted from January 19 to March 3 of that year, the period before the COVID-19 pandemic impacted the region.

This year's survey was conducted before Tunisia's President Kais Saied dismissed the Prime Minister and suspended parliament in July 2021.



# Timeline

## KEY EVENTS OF 2020 AND UP TO JUNE 2021

### 2020 / JANUARY

- Sultan Qaboos bin Said of Oman, the longest serving leader in the Gulf region, dies; smooth transition to Sultan Haitham Bin Tariq Al Said
- Chinese authorities publicly confirm for first time there is human-to-human transmission of coronavirus
- President Trump announces the release of a US-Israeli-Palestinian peace plan titled 'Peace to Prosperity.' The Palestinians dismiss it
- US drone strike kills Iranian commander, Maj. Gen. Qassem Soleimani outside Baghdad airport in Iraq

### FEBRUARY

- Saudi Arabia closes Holy Cities of Makkah and Madinah to foreign pilgrims as fears of coronavirus outbreak grows
- Sudanese military council agrees to hand over former President Omar al-Bashir to the ICC on charges of crimes against humanity

### MARCH

- WHO declares COVID-19 as a global pandemic
- Several countries in the MENA region declare lockdowns and travel restrictions
- Russia and Turkey agree to a cease-fire in the rebel-held region of Idlib in Syria

### JUNE

- Libya's Govt. of National Accord announces full control of Tripoli
- The number of confirmed cases of COVID-19 passes 10 million worldwide
- As currency falls rapidly, Lebanese citizens take to streets in anti-government protests

### MAY

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

### APRIL

- Price of a barrel of WTI, the benchmark for US oil, falls as low as minus US\$37.63 per barrel
- Saudi-led coalition declares unilateral ceasefire in its operations against Houthi forces in Yemen

### JULY

- UAE 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

### AUGUST

- UAE opens Barakah Nuclear Power Plant, the 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
- The Special Tribunal for Lebanon convicts in absentia Salim Ayyash, a senior member of Hezbollah, for the 2005 assassination of former Prime Minister Rafic Hariri

### SEPTEMBER

- Bahrain and Israel agree to normalise relations, marking the fourth Israel-Arab peace deal
- The Emir of Kuwait Sheikh Sabah al-Sabah dies at the age of 91. Crown Prince Nawaf Al-Ahmad Al-Jaber Al-Sabah is named Emir
- Tunisia swears in new technocratic cabinet led by Prime Minister Hichem Mechichi

## OCTOBER

- The number of confirmed cases of COVID-19 passes 40 million worldwide
- Israel and Sudan agree to normalise relations, marking the fifth Israel–Arab peace deal
- After major upheaval, Saad Hariri is once again named as Prime Minister of Lebanon
- New Libya cease-fire signed in Geneva
- Egypt holds the first round of parliamentary elections
- **FINDINGS OF 12th ANNUAL ASDA'A BCW ARAB YOUTH SURVEY LAUNCHED**

## NOVEMBER

- Joe Biden is elected as the 46th President of the United States
- First successful phase III trial of a COVID-19 vaccine is announced by Pfizer and BioNTech
- Algeria holds referendum over a controversial draft constitution towards democratic transition; voter turnout is only 23.7%
- Saudi Arabia hosts G20 virtual summit

## DECEMBER

- US and Saudi Arabia approve the Pfizer–BioNTech COVID-19 vaccine for emergency use
- Israel and Morocco normalise diplomatic relations; US reaffirms its recognition of Moroccan sovereignty over the Western Sahara
- US removes Sudan from its list of state sponsors of terrorism
- 10th anniversary of Mohamed Bouazizi's self-immolation (that led to the events of the Arab Spring)

## MARCH

- Pope Francis meets with Grand Ayatollah Ali al-Sistani in Najaf, Iraq, in first-ever meeting between a Pope and a Grand Ayatollah
- The Ever Given, one of the largest container ships in the world, runs aground and causes a major blockage in the Suez Canal
- Number of COVID-19 vaccinations administered crosses 500 million worldwide

## FEBRUARY

- UAE's Hope spacecraft becomes the first Arabian mission to successfully enter orbit around Mars
- Algerian President Abdelmadjid Tebboune dissolves the lower house of Parliament and calls for early elections; protesters take to the streets in a renewal of the 2019 Hirak movement
- Abdul Hamid Dbeibah is chosen as transitional unity Prime Minister of Libya
- Shipwreck kills 130 Libyan migrants bound for Europe
- Global COVID-19 death toll crosses 2.5 million

## 2021 / JANUARY

- Saudi Arabia, UAE, Bahrain, and Egypt sign declaration at 41st GCC Summit ending over three-year-long diplomatic dispute with Qatar
- Biden is inaugurated as 46th US President Supporters of former President Trump attack the US Capitol
- Protests erupt in Lebanon against nationwide COVID-19 lockdown measure
- Number of confirmed COVID-19 cases exceeds 100 million worldwide

## APRIL

- Jordanian authorities arrest over 20 people on charges of sedition
- Palestinian National Authority President Mahmoud Abbas postpones the 2021 Palestinian parliamentary elections
- Oman implements 5% value added tax
- COVID-19 global death toll surpasses 3 million; a billion vaccines administered; new spike in India and global confirmed cases exceed 150 million

## MAY

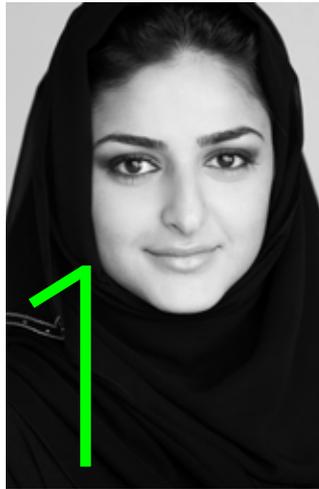
- Israel launches airstrikes on the Gaza Strip as Hamas increases rocket fire, escalating conflict, with the death toll mounting to over 250
- Over 167 million COVID-19 cases globally and deaths surpass 3.47 million

## JUNE

- UAE elected to serve two-year term as a non-permanent member of the UN Security Council
- Low turnout in snap parliamentary elections in Algeria; nearly one-fourth of members elected to the People's National Assembly are below the age of 40
- 3 billion COVID-19 vaccines administered globally
- **FIELDWORK FOR 13TH ANNUAL ASDA'A BCW ARAB YOUTH SURVEY HELD FROM JUNE 6 to 30**

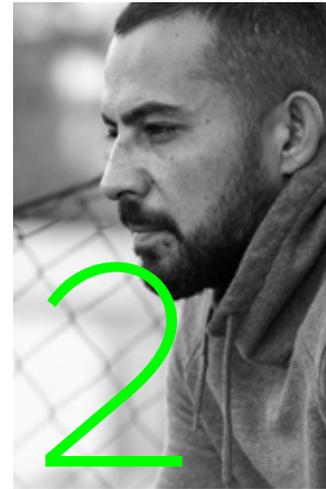


## Top findings



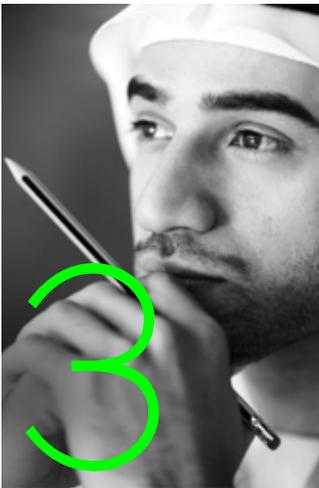
### OUTLOOK

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



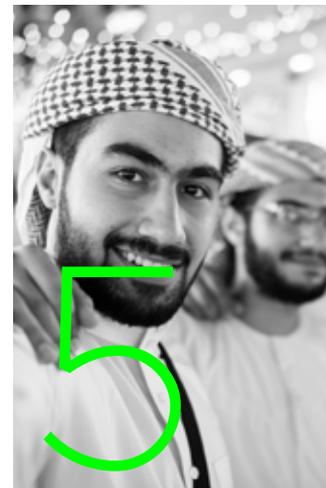
### EDUCATION & JOBS

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



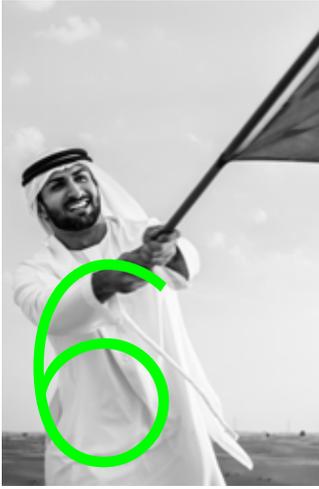
### ROLE OF GOVERNMENT

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



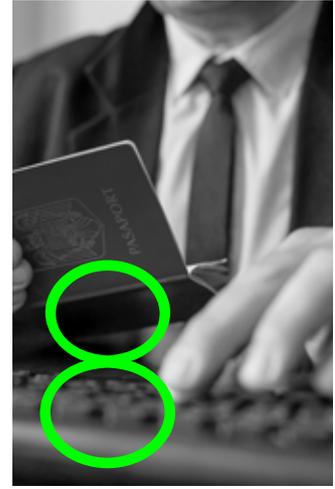
## MODEL NATIONS

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

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# 1

## OUTLOOK

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



The COVID-19 pandemic has had disastrous consequences for the Middle East and North Africa (MENA) region, with a population of over 450 million, according to the World Bank, of which more than half - over 200 million - are below the age of 25.

By the end of the year, the region's gross domestic product (GDP) will have declined by an estimated US\$227 billion, equivalent to the combined GDP of Iraq and Kuwait in 2020.

Public debt will have increased to 54% of national GDP on average across the region. Real incomes will be nearly 5% lower than they were just two years ago, and a staggering 192 million people – more than the population of Egypt, Iraq and Algeria combined – will be living in extreme poverty.

Youth in both MENA's wealthy and less privileged nations have experienced unprecedented upheaval over the past 18 months. However, while the GCC states have started to reverse the economic setbacks imposed by COVID-19, youth in countries outside the Arabian Gulf continue to struggle, not only because of the pandemic, but also the effects of political turmoil and conflict and entrenched economic mismanagement.

Arguably nowhere more so than in Lebanon, where the drastic devaluation of the Lebanese pound, responsible for wiping out the life savings of much of the population.

This was followed by the catastrophic explosion at the Port of Beirut, which killed 218 people, left an estimated 300,000 people homeless, and caused more than US\$15 billion in property damage.

Meanwhile, in Tunisia, the epicentre of the 2011 Arab Spring, large-scale social unrest over the government's handling of the pandemic saw the prime minister sacked and the national parliament suspended.

It is amidst this challenging environment that the 13th annual ASDA'A BCW Arab Youth Survey was conducted, revealing a counter-intuitive finding of hope for the future. Clearly, the exuberance, tremendous resilience and optimism of the Arab youth shine through.

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## 192 million

People in MENA expected to be in extreme poverty by end-2021

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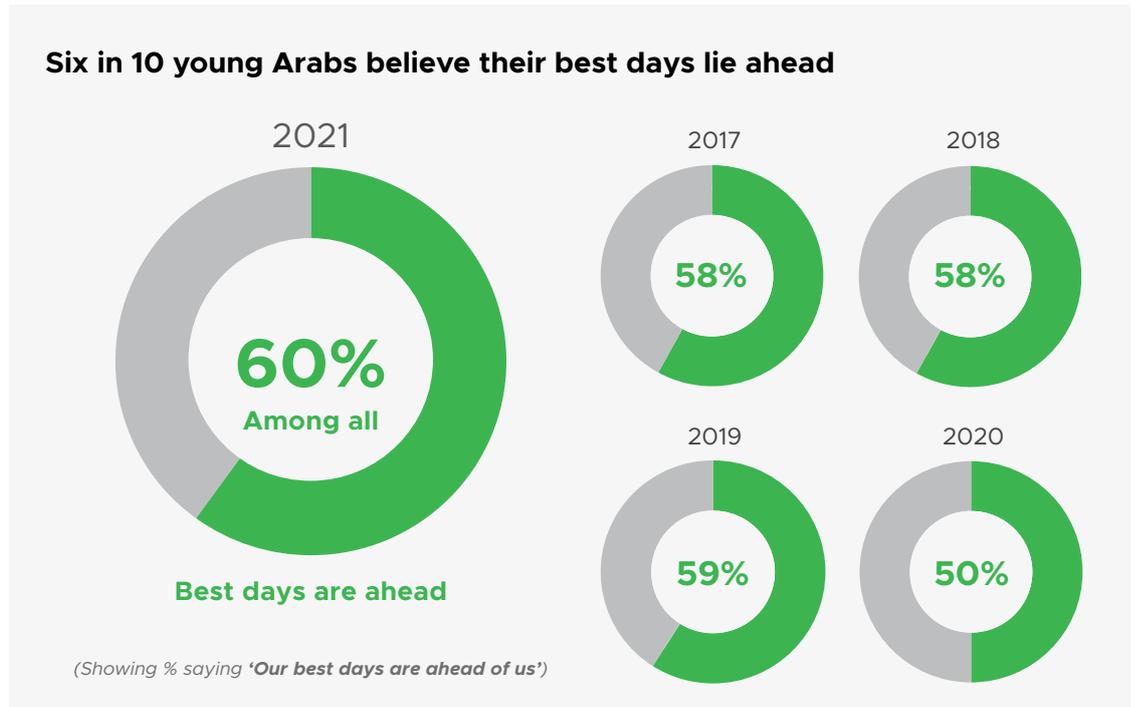


When asked whether they believed their best days were either ahead of them or behind them, an astonishing 60% of all respondents, expressed optimism in the future. This is undoubtedly the top finding of the 13th annual ASDA'A Arab Youth Survey 2021.

Incredibly, confidence today is even higher than it was last year, before the pandemic struck, when only 50% of the cohort agreed that their best days were ahead of them.

In fact, according to the survey, optimism among Arab youth, is at its highest point in five years.

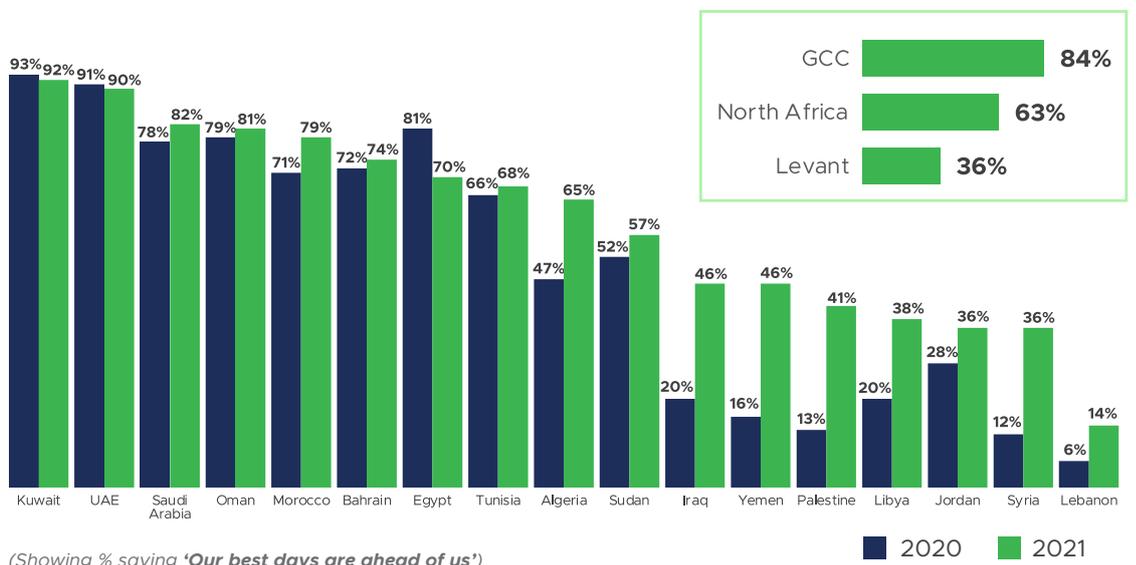
Explaining this is by no means simple. It may indeed be that after recent events, young Arabs believe their situation could hardly get any worse. But the conviction that their lives will improve is held by young people in almost all the 17 countries surveyed.



### Youth optimism: The regional split

Hope for the future witnessed its most dramatic growth in the Levant and North Africa. For example, 20% of young Iraqis said that their best days were ahead of them in 2020, whereas half of respondents (46%) agreed with the statement this year. Fourteen per cent of young Lebanese felt the same way, compared to just 6% last year. Notable spikes in optimism were also recorded in Yemen, Algeria, Palestine, Libya and Syria.

Overall, youth in the Arabian Gulf are the most optimistic, with 84% of young Arabs in the GCC saying their best days lay ahead of them, compared to 63% of youth in North Africa, and just over a third (36%) in the Levant.





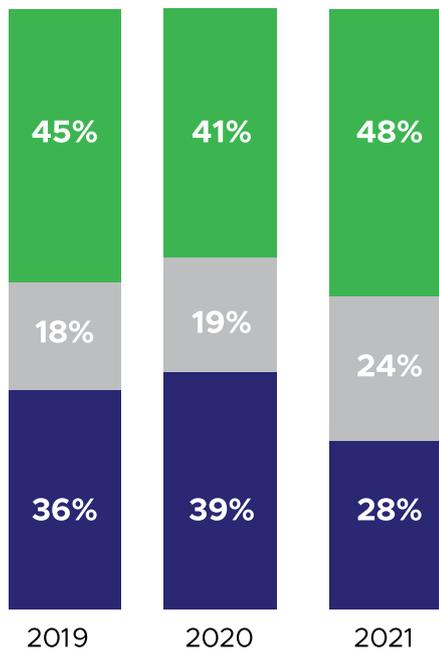
Young Arabs are increasingly optimistic today that they will have a better life than their parents did, which mirrors their view that 'their best days lie ahead'

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

Nearly half of Arab youth (48%) believe they will fare better than their parents, compared to 41% in 2020, the highest percentage in three years. Accordingly, around half say the economy in their country is going in the right direction, slightly more than the proportion of young Arabs with the same outlook in 2020.

#### Which of the following is closer to your view?

- I will have a better life than my parents did
- About the same
- I will have a worse life than my parents did

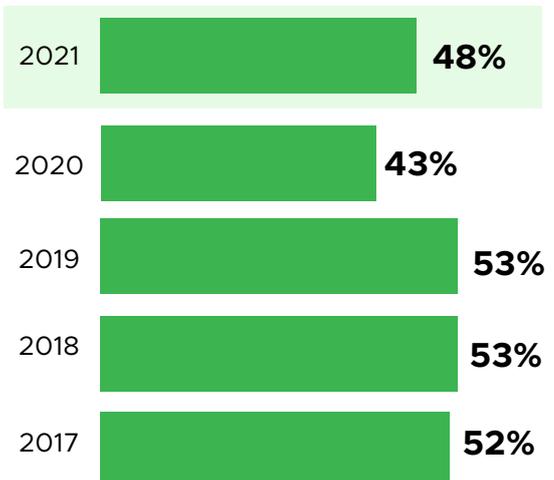


# 48%

Young Arabs believe they will have a better life than their parents

#### 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')



## Arab youth expect full economic recovery in 2022

Most also expect the region's economy to have fully recovered by 2022. Around two-thirds in the GCC (62%) expect it to be back on track in 2022, while half of the youth in North Africa (48%) and the Levant countries (49%) are similarly optimistic.

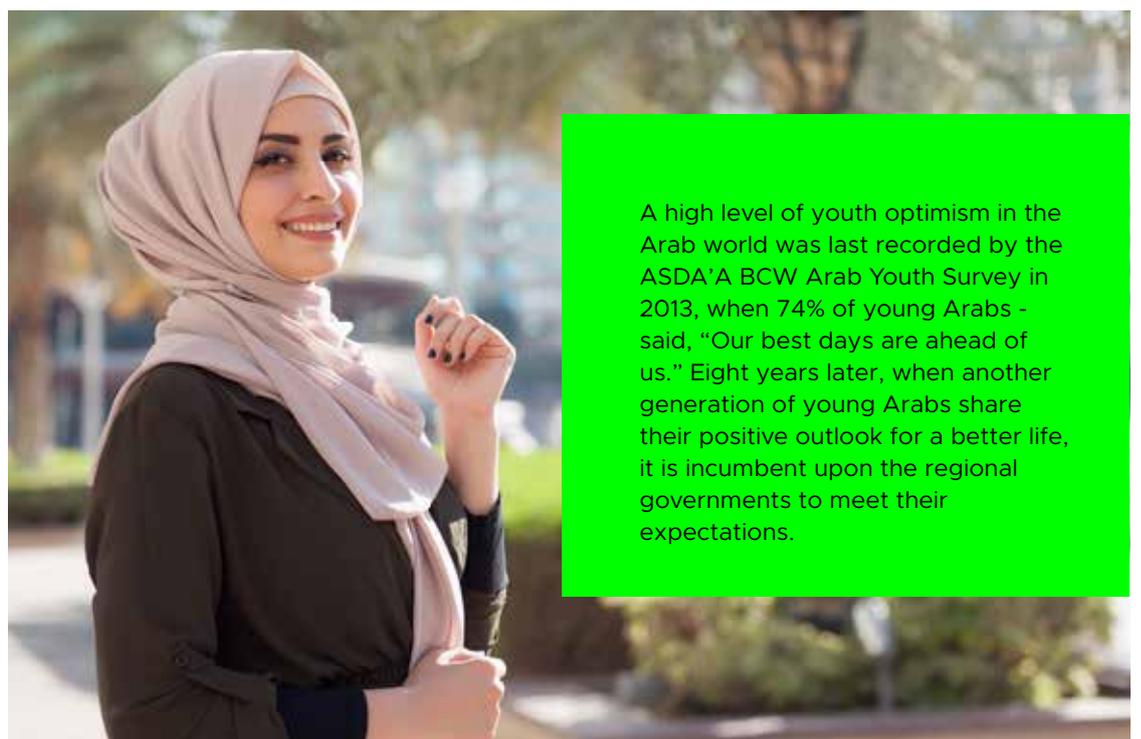
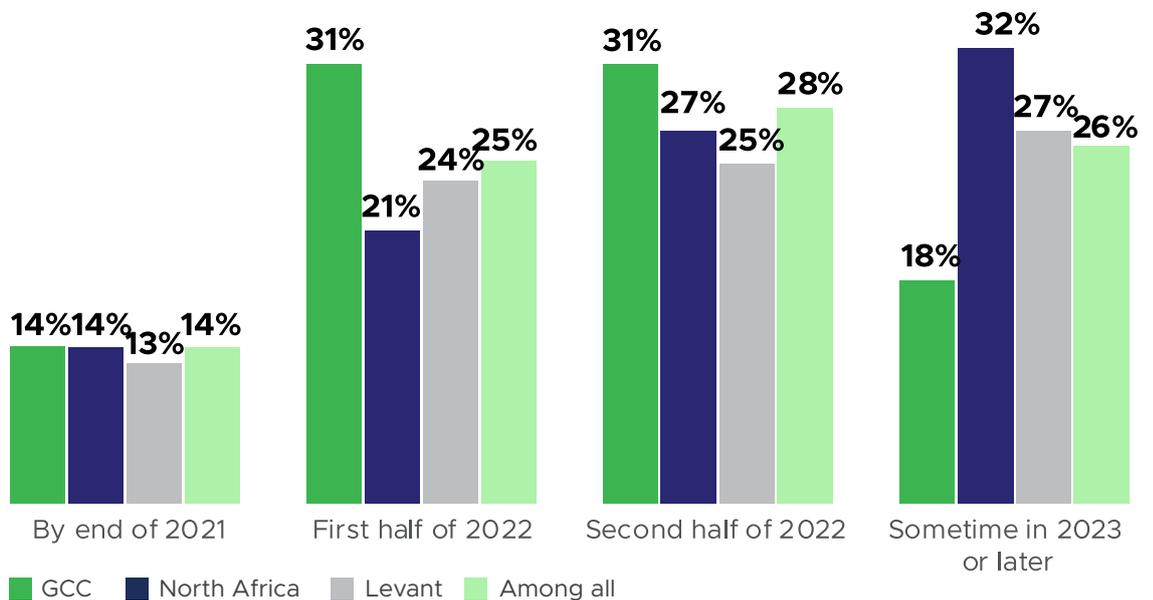
Such high levels of confidence were last recorded among Arab youth in the 2013 survey,

when roughly three-quarters (74%) of respondents said their best days were ahead of them.

Eight years later, when another generation of young Arabs share their positive outlook for a better life, it is upon the regional governments to meet their expectations.

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

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



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# 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 have consistently reported their concern about the rising cost of living, and this has worsened with the pandemic*

Everyday concerns such as paying bills, buying food, and covering medical and education expenses, continue to weigh heavily on Arab youth, who cite such kitchen table issues as key hindrances to the region's growth.

According to the International Monetary Fund, inflation in the Middle East averaged 7.1% annually from 2000 to 2017 and could reach 12.8% this year, driven by higher food and energy prices.

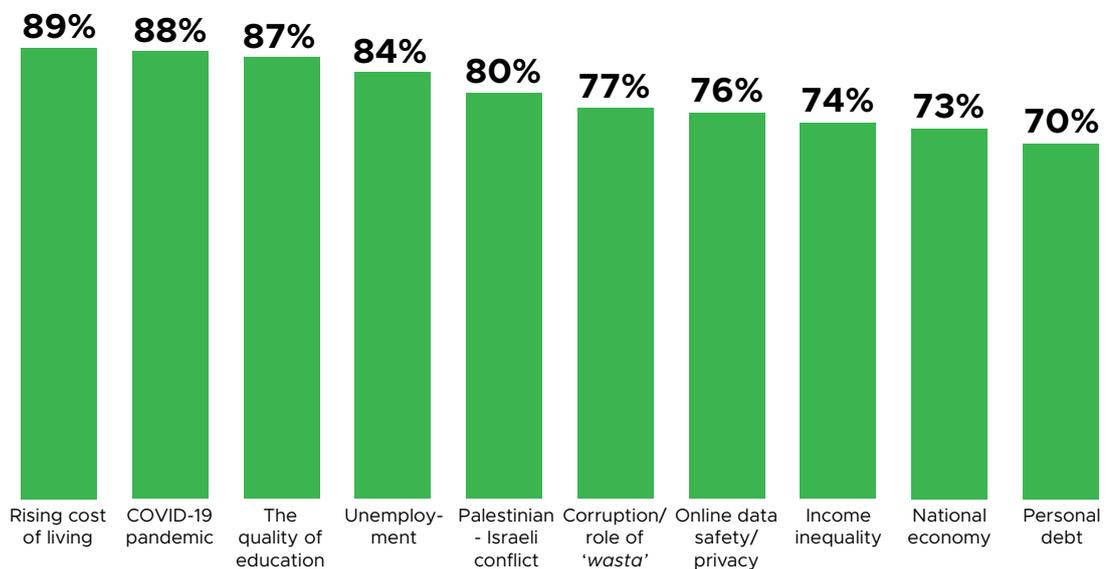
Unsurprisingly, almost nine in 10 young Arabs across MENA (89%) view rising living expenses as a grave concern, according to this year's survey.

This is followed by concern over the impact of COVID-19 (with 88% across MENA saying they are 'very concerned' or 'somewhat concerned' by the pandemic), education quality (87%) and unemployment (84%). And more than three-quarters (77%) point to the persistent problem of nepotism and corruption.

## 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 % of 'Very concerned' and 'Somewhat concerned', top eight concerns)*



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# 12.8%

Projected inflation in MENA in 2021, driven by higher food and energy prices

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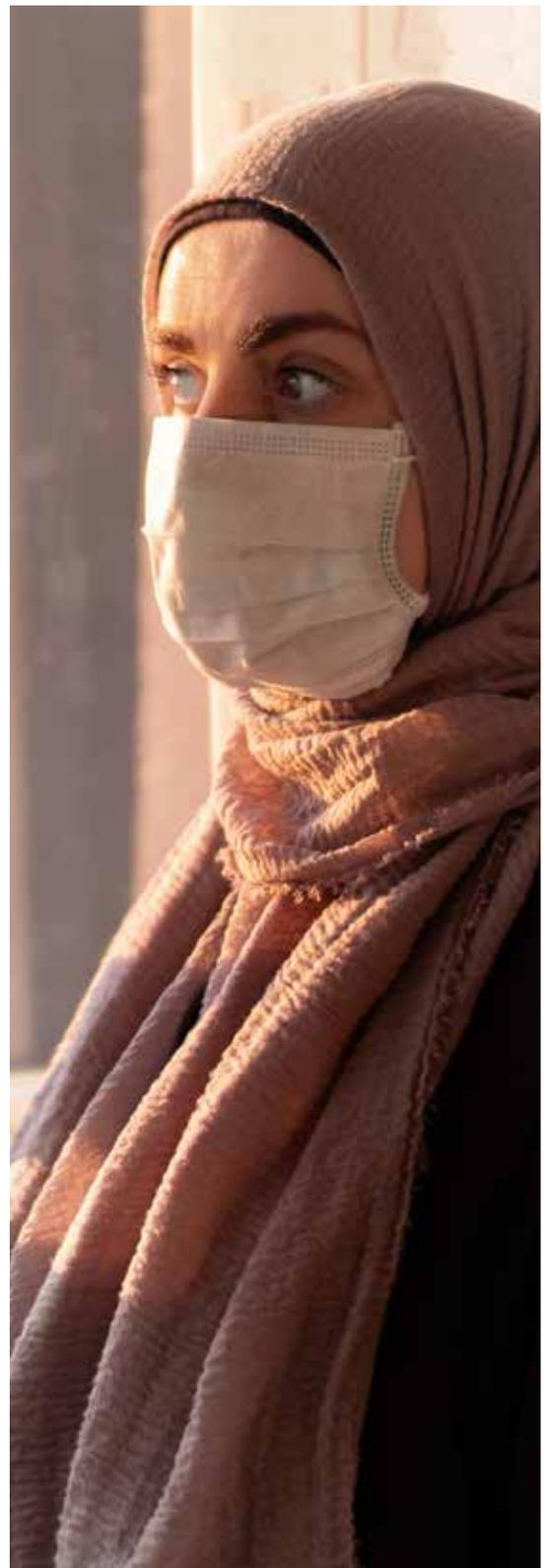
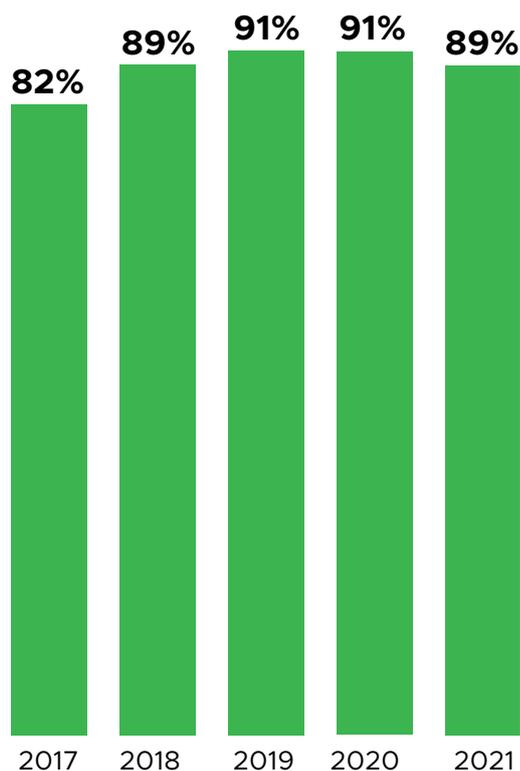
Sadly, the problem of living expenses appears to have worsened since we first asked respondents to identify the region's top 10 obstacles in 2010. Then, just over two-thirds (67%) ranked the cost of living as their main concern.

Highlighting the unrelenting pressure of inflation on their national economies, nearly nine in 10 young Arabs said rising living costs were their biggest worry for the past five years.

### 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')



From Egypt to Sudan, concern about how the pandemic will impact their future is high among Arab youth. Even in GCC countries, which took decisive action to address the pandemic, concern lingers.

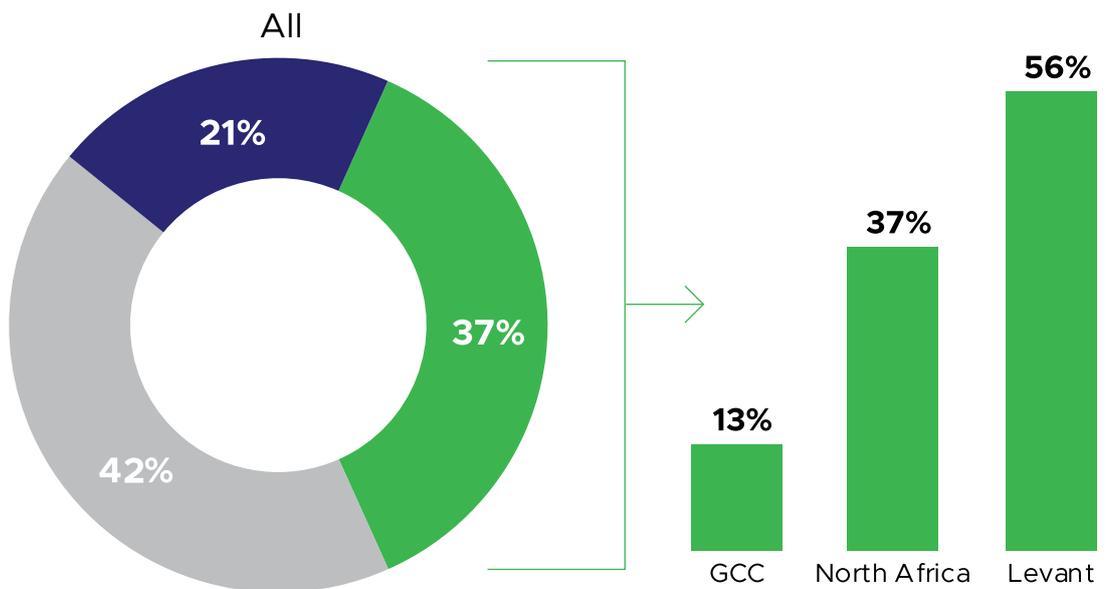


**Over a third of young Arabs say they struggle to meet their expenses, rising to over a half in the Levant**

The 2021 survey found that more than a third (37%) of Arab youth say they usually struggle to meet their expenses in full, while nearly half (42%) can meet their expenses but are unable to save. Only one in five (21%) said they were able to cover their expenses and have some money left for savings.

Illustrating the region's divergent living standards, only 13% of youth in the GCC say they struggle to meet their expenses in full, while over half in the Levant (56%) and more than one-third (37%) of youth in North Africa say the same.

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



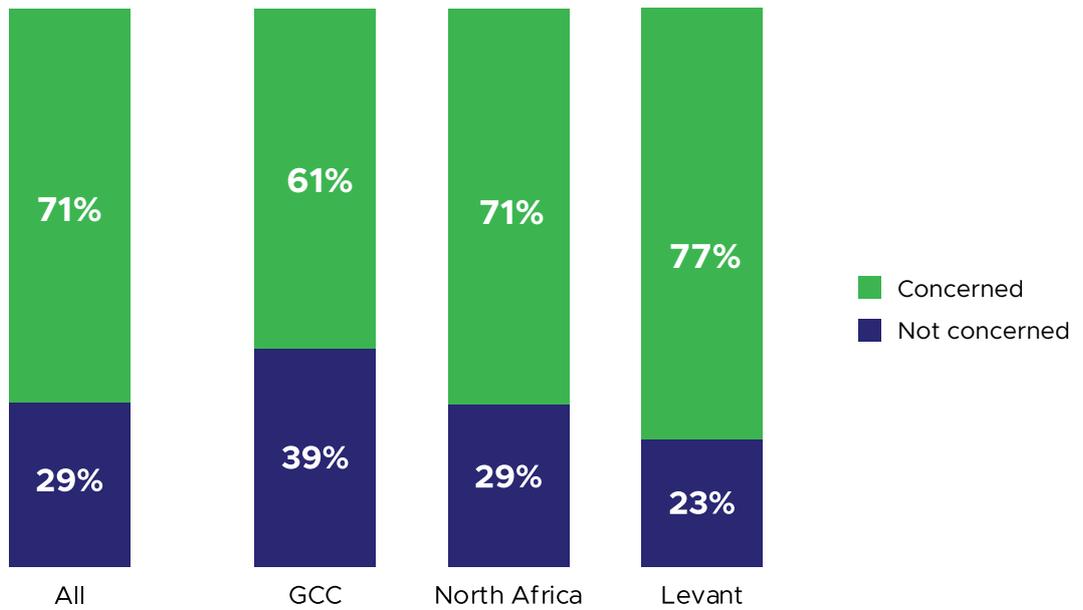
- Usually, I struggle to pay my expenses in full
- I am able to pay my expenses in full, but usually have no money left for savings
- I am able to pay my expenses in full, and usually have some money left for savings

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

Nearly three-quarters of respondents overall (71%) admit to worrying about personal debt. This concern is highest in the Levant countries at 77%, followed by North Africa (71%) and the GCC (61%), with student loans, car loans and medical bills cited as the main factors.

Car loans are the leading cause of debt among young Arabs in the GCC, while student and/or business loans mainly account for the debt worries of North African youth.

### How concerned would you say you are about personal debt?



#### Top reasons for debt among Arab youth

GCC	Car loans
North Africa	Student/business loans
The Levant	Student loans

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# Optimistic young Arabs mark the prospect of generational progress



**Faisal Al Yafai**

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Faisal Al Yafai is a journalist and partner at Hildebrand Nord in the UK. He was previously an investigative journalist for The Guardian in London and a documentary journalist for the BBC, and has reported from across the Middle East, Eastern Europe, Russia and Indonesia for prominent media platforms.

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In the autumn of an extraordinary year, the ASDA'A BCW Arab Youth Survey has delivered a surprising and unexpected finding: in the midst of so much tumult, young Arabs across the region are more optimistic about the future than they have been for years. Measured among all the countries surveyed, a majority, 60%, believed their best days are ahead of them.

This is surprising and inevitably the findings varied by geography – young Lebanese, surveyed in the midst of the worst financial crisis for a generation, were least optimistic. Yet in almost every country, young people were more optimistic this year than they were last year, despite this being the first Arab Youth Survey to be conducted in the midst of the pandemic. (Last year's took place before the region was overly impacted.) As such, the survey gives an insight into how Arab youth feel at a moment of immense change – and perhaps even renewal.

It bears repeating that young Arabs – those between 18 and 24, who were the focus of this research – are the majority demographic across the region. The Arab world remains overwhelmingly young. All the more reason, then, for businesses, governments and individuals to understand what they think – and understand where the roadblocks to their success and advancement are.

The most interesting part of reporting on the politics and policies of the Middle East is how similar the major issues are to every other part of the world, despite the prevalence of such extraordinary events and long-running conflicts.

An intriguing finding from this year's Arab Youth Survey falls squarely in this category: that around half of young Arabs say they will lead a better life than their parents.

This is an enormously positive finding, and provides a guiding principle for why young Arabs have such hope for the future.

This idea of generational progress, that each generation does better than the one before, is an essential part of modern politics. In most societies, it is a foundation of the social contract.

In the west, that social contract may be broken for the first time for this rising generation – and young people know it. The burden of insecure work, expensive housing, debt from education and the high cost of living have combined to make young people pessimistic. In survey after survey, for at least the past decade since the global financial crash, a majority of young people in the developed world have expressed the belief that their lives will be worse than their parents. In the developing world, that optimism remains.

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In the Arab world, this issue is complicated by geography. Some parts of the region are developed, others are still developing, and many are marred by conflict. It is also complicated by politics, and by differing political systems – although the survey suggests around half of young Arabs still feel at least their country's economy is going in the right direction. Overall that optimism remains – and, as this year's survey shows, has risen from last year.

## Obstacles to progress

What then are the obstacles to fulfilling this outlook? What could stand in the way of such optimism and hold the youth of the region back from achieving their desired success?

Here, just as the Arab world is most positive on that bread-and-butter political issue of generational progress, so the obstacles are 'kitchen-table issues' that will be familiar to most societies.

Four in particular stand out and make for sobering reading: the cost of living, the costs and quality of education, unemployment, and – that perennial issue in the Arab world – the pernicious role of 'wasta'.

### Impact of the rising cost of living

It should be no surprise that, in the year of the pandemic when businesses and employees were put under enormous strain, the rising cost of living is at the very top of the list of concerns for young Arabs. But it is more concerning how stubbornly high that concern has remained, hovering around 90% since 2018. Inflation affects the cost of all aspects of the economy, but young adults can feel it keenly because a higher percentage of their salaries go on the essentials.

A key part of feeling the cost of living is too high is personal debt, and here the survey shows a majority of youth in every part of the Arab world are concerned about their levels of indebtedness. But the most common reasons for going into personal debt are intriguing.

In the Levant, it is education, perhaps reflecting a limited range of low-interest government loans specifically for higher education. In North Africa, it is business loans – again, a reflection of the high number of North African youth who say in this survey they want to start their own businesses.

In the GCC, it is car loans – but even this isn't solely an issue of conspicuous consumption (although sometimes it very much is) but a question of policy. Given how spread out many of the cities of the Gulf are, and the still developing public transport network, owning a car is usually a necessity.

### Importance of educational reform

What comes out clearly from the survey is the need for educational reform, both in terms of what is taught and how it is financed.

Education comes up again and again across the Arab Youth Survey. It's there when young Arabs name quality of education as one of their major concerns; it's there when they talk about the sources of their personal debt; it's there when they say how badly the COVID-19 pandemic has affected their educational experience; and it's there when they list education reform as one of the top priorities their government should have.

The reason governments should listen closely is because the survey is focused on teenagers and young adults, so it covers those still in education and those just leaving for the world of work. Few will know better what they are taught and whether they feel properly equipped for employment.

The same goes for the role of 'wasta', which again comes up as a major concern more than once. Wasta is a complicated concept that permeates many relationships across the region, but as it pertains to education and employment,

it is usually negative. If young adults are so concerned about it, it is because wasta is often the cause of corruption in their dealings with government bureaucracy and nepotism in their dealings with employers.

### The type of employment

All of these are hard political questions. But none are harder than the question of employment, which is both a major concern for young Arabs and the aspect that will most directly determine their futures.

The pandemic has inevitably affected the region, although the richer eastern Arab world has fared better. Still, few have escaped unscathed: that a third of Arab youth have either lost their job or had a member of their family lose their job due to the pandemic is startling.

In terms of what kind of work they aspire to, entrepreneurship is still a big draw for youth, but government jobs continue to hold an outsize appeal – especially in the Gulf, where nearly 60% aspire to work for the government. This trend goes against what most governments in the Arab world want, which is a smaller public sector.

The size of the public sector is a constant theme across the region. Most Arab countries are trying to implement two contrasting policies at the same time: shrink the public sector and lower the unemployment rate. In practice that means moving those working in the public sector to the private sector, which isn't always an easy thing to do.

Among the Gulf states, unemployment is less of an issue, but there the issue is "localisation", ensuring that Gulf nationals are working across the economy. (Localisation is more usually known as Emiratisation, Saudisation etc.) The political pressures are similar, because Gulf governments usually employ the majority of their nationals, so localisation also means moving nationals from the public to the private sector.

When it comes to Arab youth, there is an opportunity to get young people leaving education to move directly into the private sector, rather than – as happens too often, and as the survey itself confirms – waiting for a government job for its perceived perks. In the Arab Youth Survey, young people themselves offer ways this could be done, suggesting offering start-up loans to reduce the financial risk, and bringing in entrepreneurial education into the schools system.

### Make the 'Hope for the Future' a reality

Four obstacles then, roadblocks to the fulfilment of the optimism young Arabs feel. All are bread and butter political issues that can be solved with clever politics – and fortunately the survey shows young Arabs still have faith in governments to fix many of these problems.

The ASDA' A BCW Arab Youth Survey isn't all about politics. The survey, as the following pages show, also asked young Arabs wide-ranging questions about the media, shopping, family relations and the wider world. Yet politics can help create the environment in which all those aspects of society can thrive.

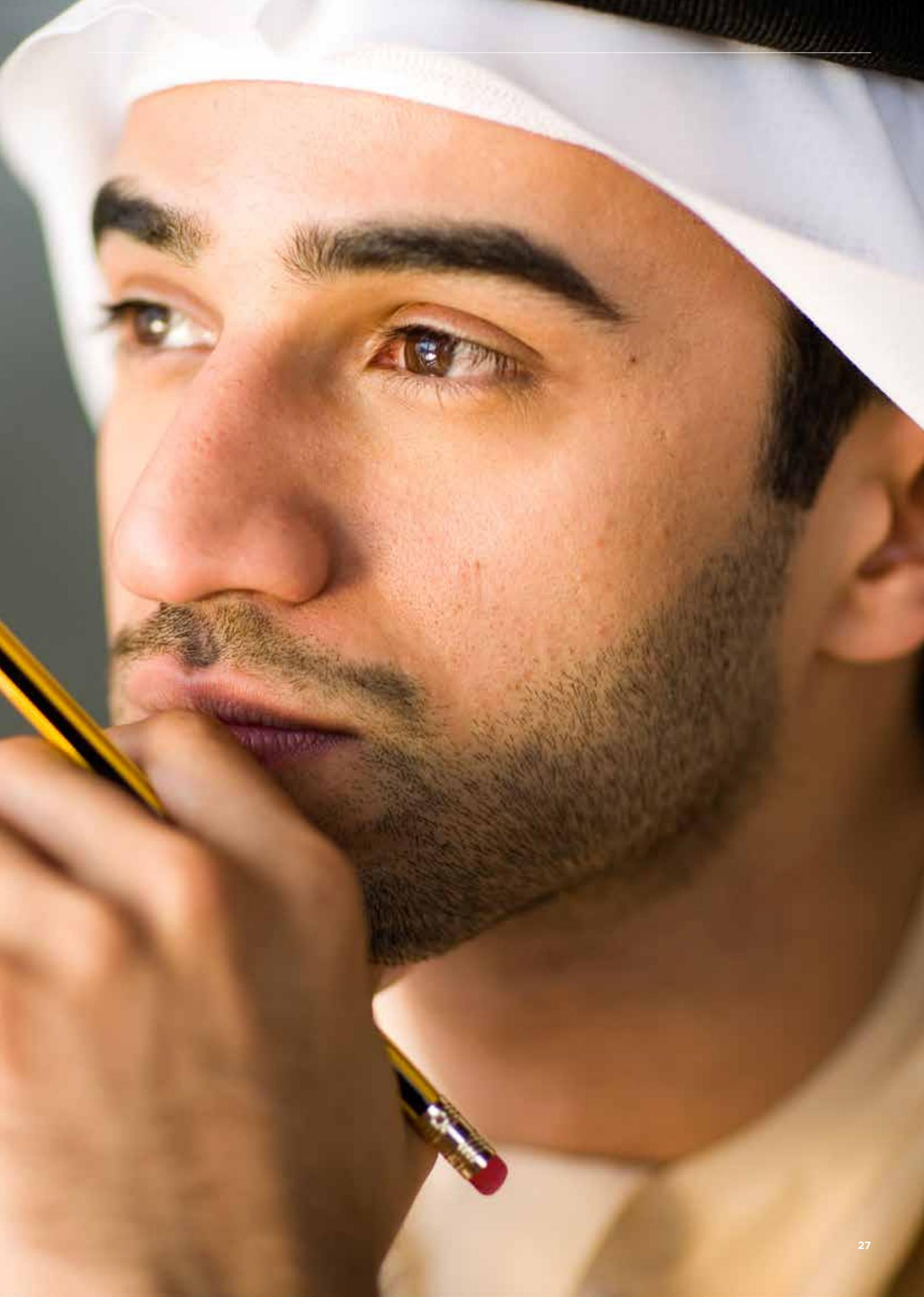
This year's survey is called 'Hope for the Future'. There is, certainly, a boundless ingenuity, enthusiasm and optimism in the region, particularly among young people, and that comes through in the survey. What remains is for governments, businesses and individuals to find ways to make that hope for the future a present reality.

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# 3

## EDUCATION & JOBS

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



Two issues have dominated the findings of the ASDA'A BCW Arab Youth Survey over the past 13 years: the need for well-paid jobs and access to quality education.

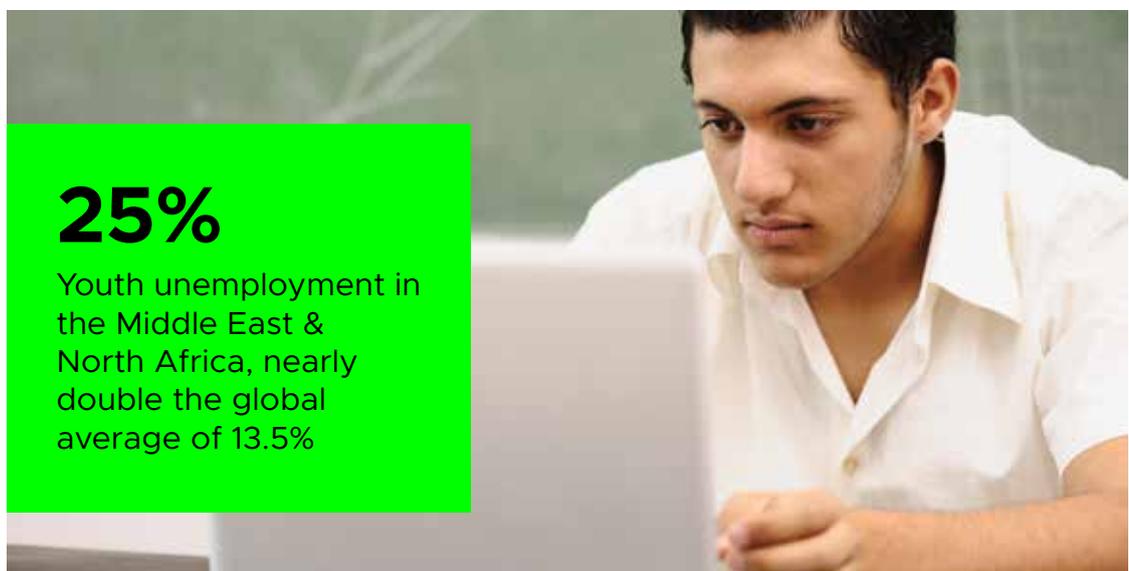
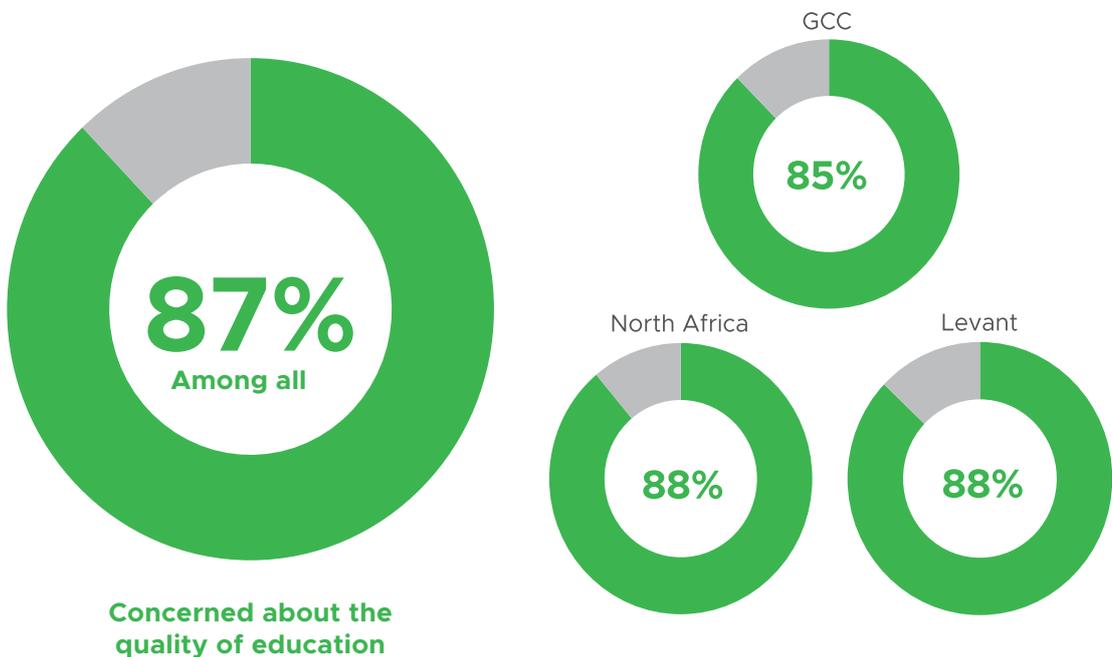
At over 25%, youth unemployment in the Middle East & North Africa far exceeds the global average of 13.5%, according to the World Bank. Education standards are widely perceived as being at the root of the problem.

According to the 2021 survey, nearly nine in 10 young Arabs in MENA (87%) are concerned about the quality of education they receive. This anxiety is evenly spread across the region, with 85% of Arab youth in the GCC, and 88% of youth in both North Africa and the Levant expressing dissatisfaction with the education available to them.

## 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')





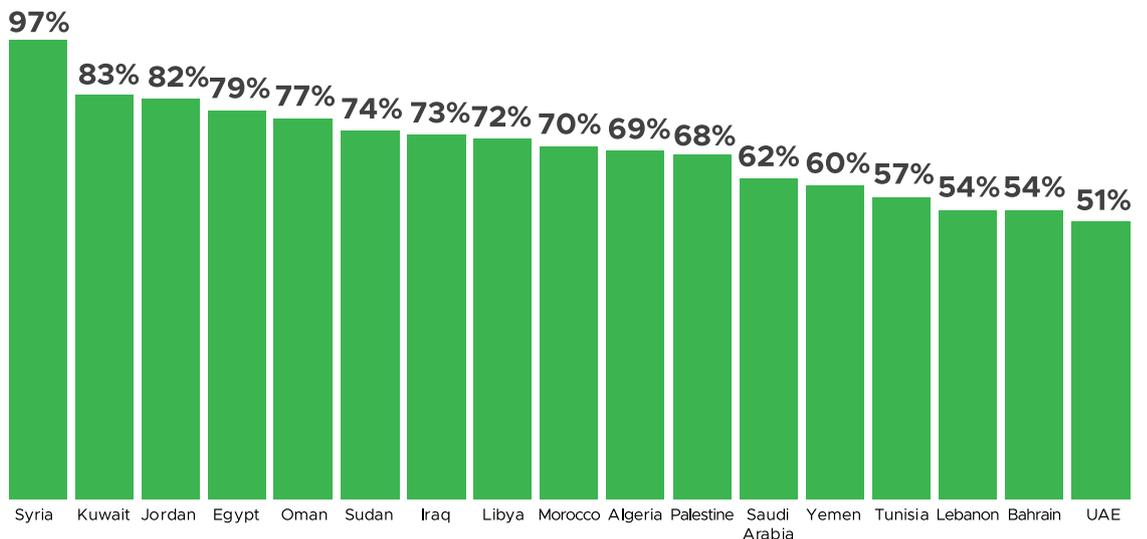
*Young Arabs are increasingly concerned about access to quality higher education, a challenge that has been cited by them over the past 13 years of the survey*

Alarming, the COVID-19 pandemic has worsened the education experience for young people across the board, even in the UAE, where more than half of respondents (51%) said the pandemic had negatively impacted their 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')





The pandemic has aggravated the unemployment situation in the Arab world as more young people struggle to find jobs

Inevitably, this has affected jobs. A third of this year's cohort said either they or a family member had lost their job due to the pandemic. Out of these, nearly two-thirds (63%) said neither they nor their relative had been able to find a new one.

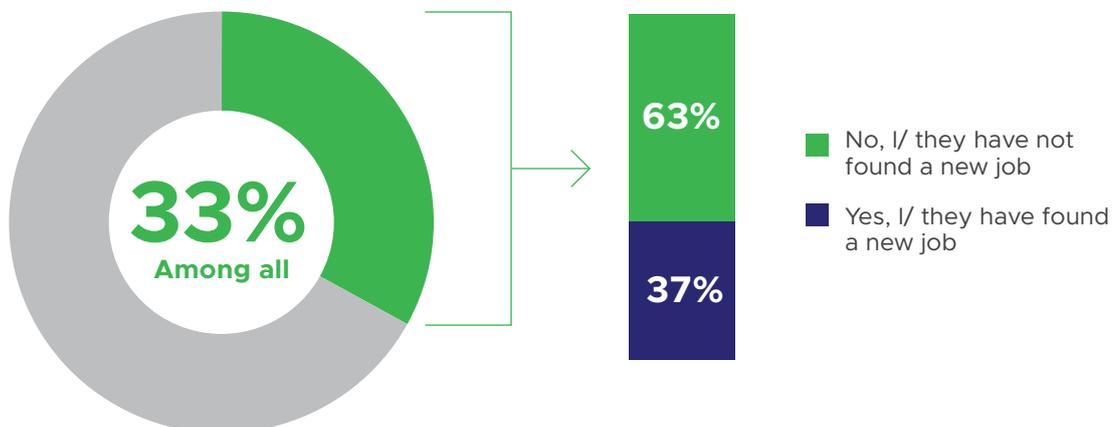
### A third of Arab youth have had someone in their family lose their job due to COVID-19, and most have yet to find another one

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

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

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

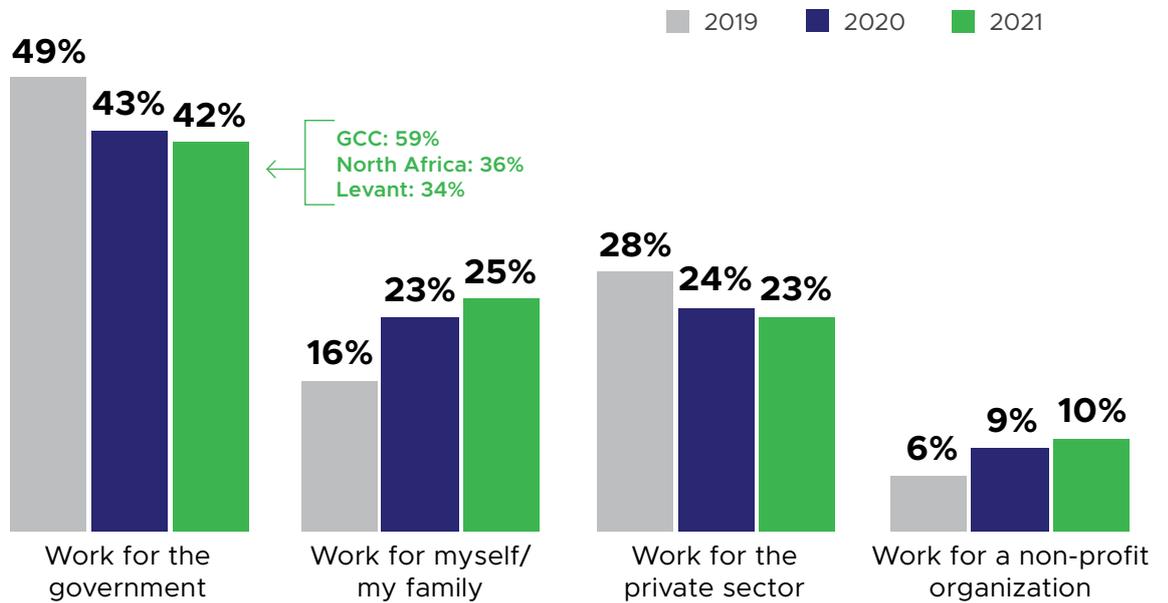
(Showing % of 'Yes')



**1/3** Someone in their family has lost a job due to COVID-19

## 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...?



According to this year's survey, most Arab youth would still choose to work for the government, but many now accept they will have to rely on their own ingenuity or their families to make a living.

The preference for government jobs has declined from 49% of all respondents in 2019 to 42% this year.

Fewer young people are also considering the private sector, with less than a quarter of young Arabs (23%) saying they would prefer to work for a business compared to 28% in 2019.

At the same time, the appeal of working for themselves or their family has jumped, with a quarter of respondents (25%) saying this was their preferred option compared to 16% three years ago. A tenth of Arab youth are also interested to work in the non-profit sector, compared to only 6% who expressed such a preference in 2019.

Looking towards the next 10 years, the majority, one in four (23%), said they wanted to pursue a successful career, followed by one in five (21%) who said finishing their studies was the priority. Getting onto the career ladder was the preference for Arab youth in the GCC, while completing their education was most important for young Arabs in the Levant.

According to this year's survey, most Arab youth would still choose to work for the government, but many now accept they will have to rely on their own ingenuity or their families to make a living.

# 42%

Young Arabs prefer government jobs

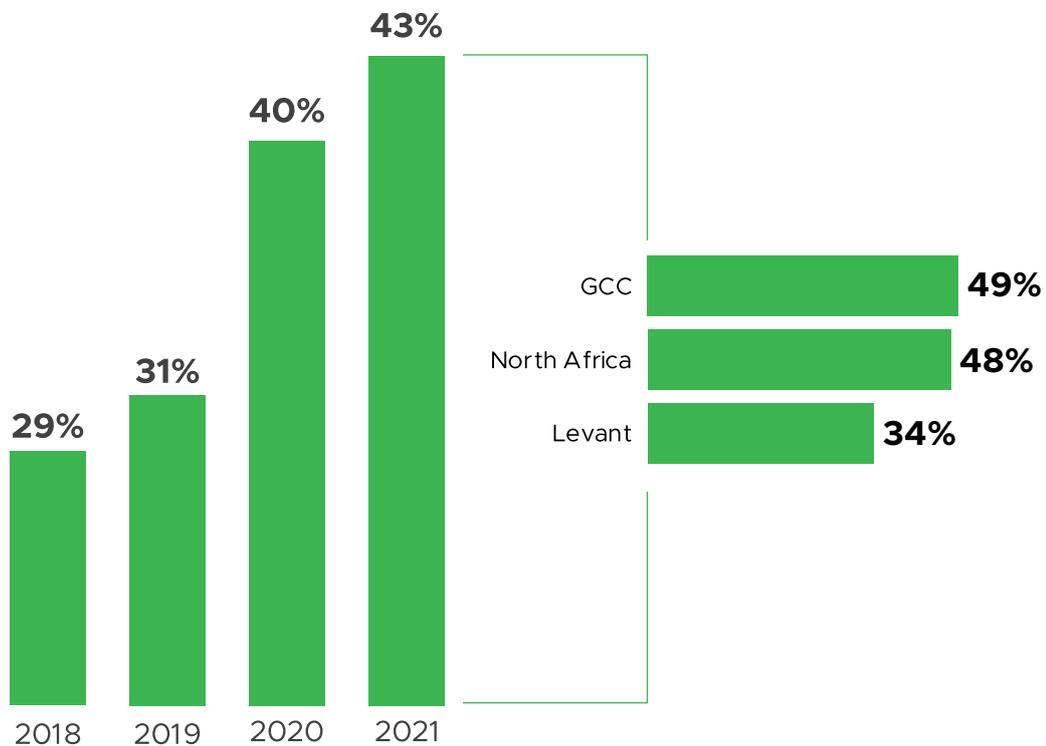


Youth interest in entrepreneurship is a growing trend and young Arabs in the GCC are most motivated to start their own business

## 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')



Interest in entrepreneurship among Arab youth is a growing trend, according to the survey. Today, nearly half of young Arabs (43%) intend to start their own business within the next five years, compared with 29% of respondents in 2018, 31% in 2019, and 40% last year.

Young people in the GCC and North Africa are the most motivated to start a business, followed by the Levant, where a third of respondents (34%) said they intended to start their own enterprise within the next five years.

## Continuing appeal of government jobs may be holding back greater entrepreneurship across the region

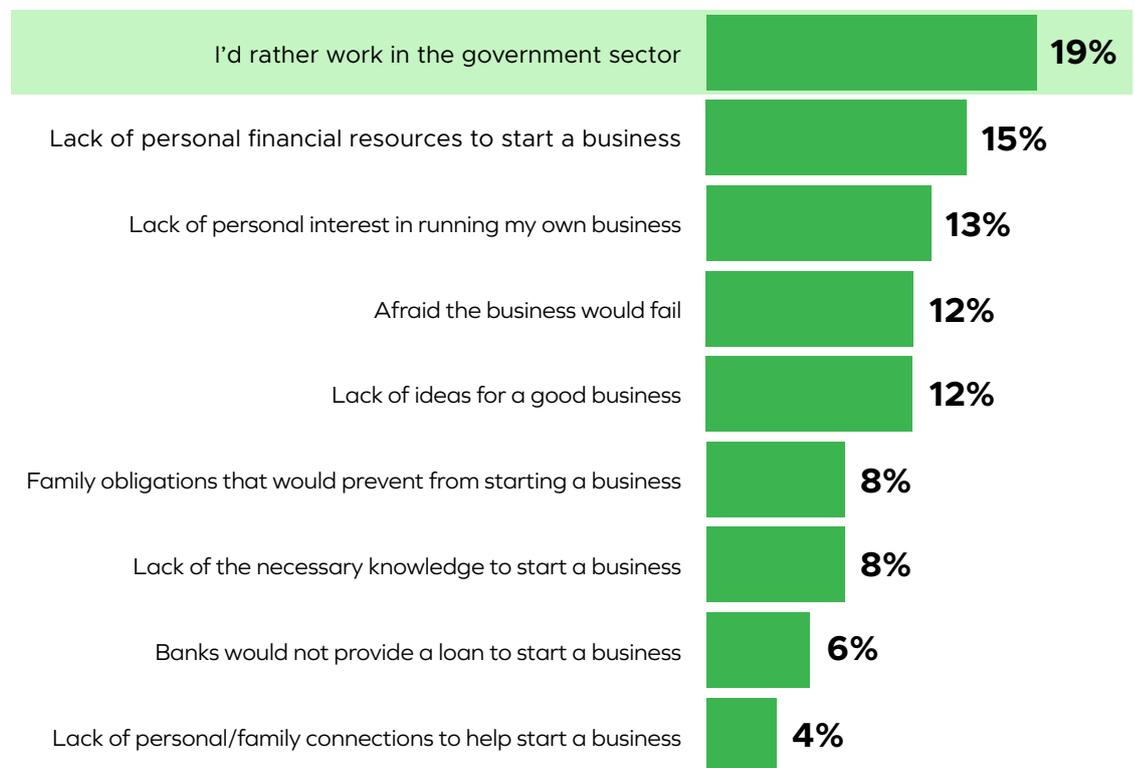
It could be that the prospect of a public sector job is discouraging some young people from setting out on their own, with around 19% of young Arabs saying that the attraction of government employment was one of the reasons why they didn't want to go into business.

Limited financial resources (15%), a lack of personal interest (13%), fear of failure (12%) and not having a good business idea (12%) are other factors.

With an estimated 127 million young Arabs expected to join the MENA workforce by 2040, and as many as 17% of all jobs at risk of disappearing by 2030 because of digitalisation and other Fourth Industrial Revolution trends, it will become increasingly essential to overcome the inadequacies of the region's education sector, particularly if we are to help Arab youth prepare for the jobs of the future and to realise their entrepreneurial ambitions.

### 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

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# 4

## ROLE OF GOVERNMENT

Young Arabs agree their voice matters to their country's leadership, but they expect them to do more to tackle nepotism and promote entrepreneurship



The tragic death in December 2010 of 26-year-old Mohamed Bouazizi, the fruit vendor who set himself on fire in the north-eastern Tunisian city of Ben Arous, not only catalysed the Arab Spring, it also redefined the Middle East & North Africa's social contract.

Bouazizi's self-immolation more than a decade ago brought into the open a host of systemic and generational challenges many governments in the region had previously ignored.

And while the jury is still out on the legacy of the Arab Spring, few can argue that the seismic events of 2010 and 2011 gave young people in the region a powerful collective voice for the first time, aided by social media.

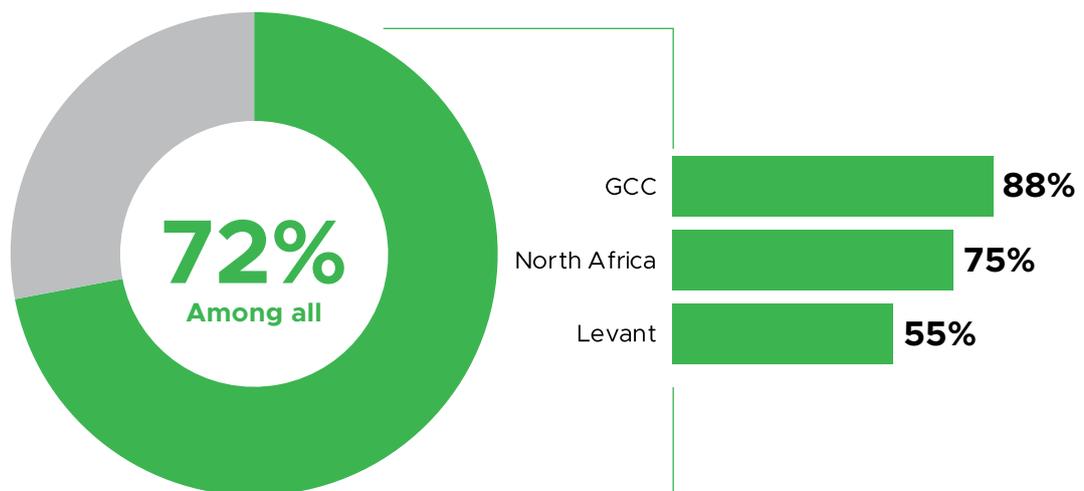
Thankfully, governments across MENA have taken notice, a fact many Arab youth are willing to acknowledge.

Nearly three-quarters (72%) of young Arabs say their voice matters to their country's leadership – a view held by an overwhelming 88% of interviewees in the GCC. Even in the North Africa and Levant countries that witnessed significant social unrest in the wake of the Arab Spring, many young people now believe their opinions matter to their political leaders.

## 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')



### Voice matters to leadership

“The greater optimism and positive forward-looking sentiment provide a unique window of opportunity to shape a transformational recovery by pushing ahead the long-awaited reforms needed to provide better opportunities to young people in the region.”

**Dr. Jihad Azour**, Director of the International Monetary Fund's Middle East and Central Asia Department

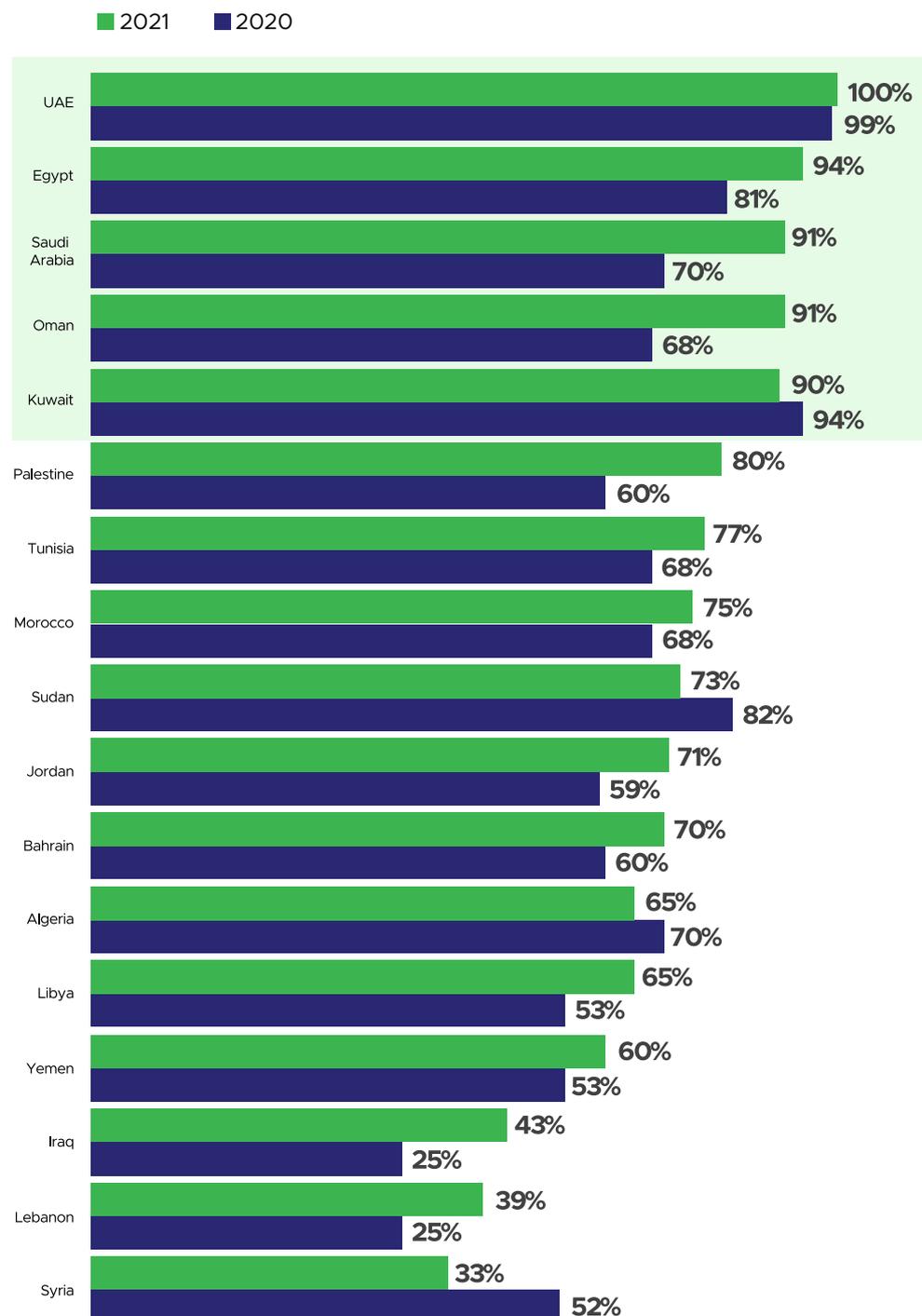
(Ref. Page 40)

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

In fact, more than nine in 10 young Arabs in the UAE, Egypt, Saudi Arabia, Oman and Kuwait agreed with the statement that ‘their voice matters to their country’s leadership’. Youth in Egypt, Saudi Arabia and Oman agreed with the statement more strongly than they did last year, while all young Emiratis (100%) either strongly or somewhat agreed.

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

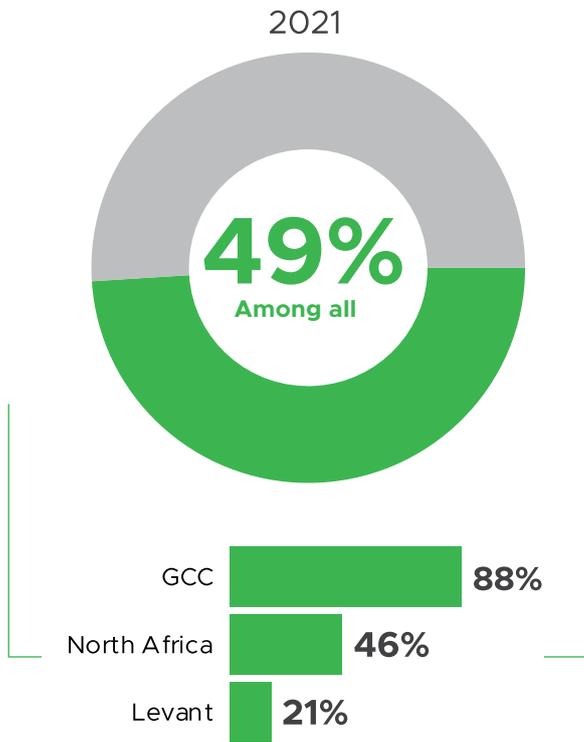
(Showing % saying ‘Strongly agree’ or ‘Somewhat agree’)



## 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)

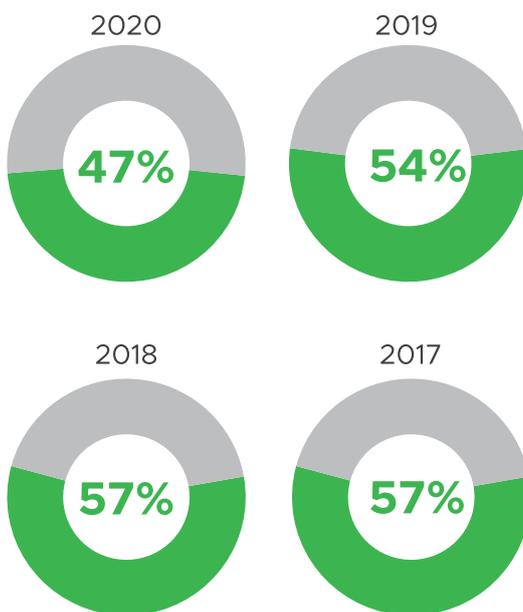


Government focus on youth issues witnessed a jump in approval in all 17 of the states surveyed this year, except in Sudan, Kuwait, Algeria and Syria. Approval even rose in Iraq and Lebanon.

Meanwhile, nearly half of respondents (49%) overall say their governments have the right policies in place to tackle the issues most important to them, although their confidence has diminished somewhat since 2017, when 57% believed their governments had the right policies.

Trust is highest in the GCC, at 88%, and lowest in the Levant, where barely one in five (21%) believe their governments are pursuing the right policies. Youth in North Africa are evenly split on this key question.

### Government has the right policies

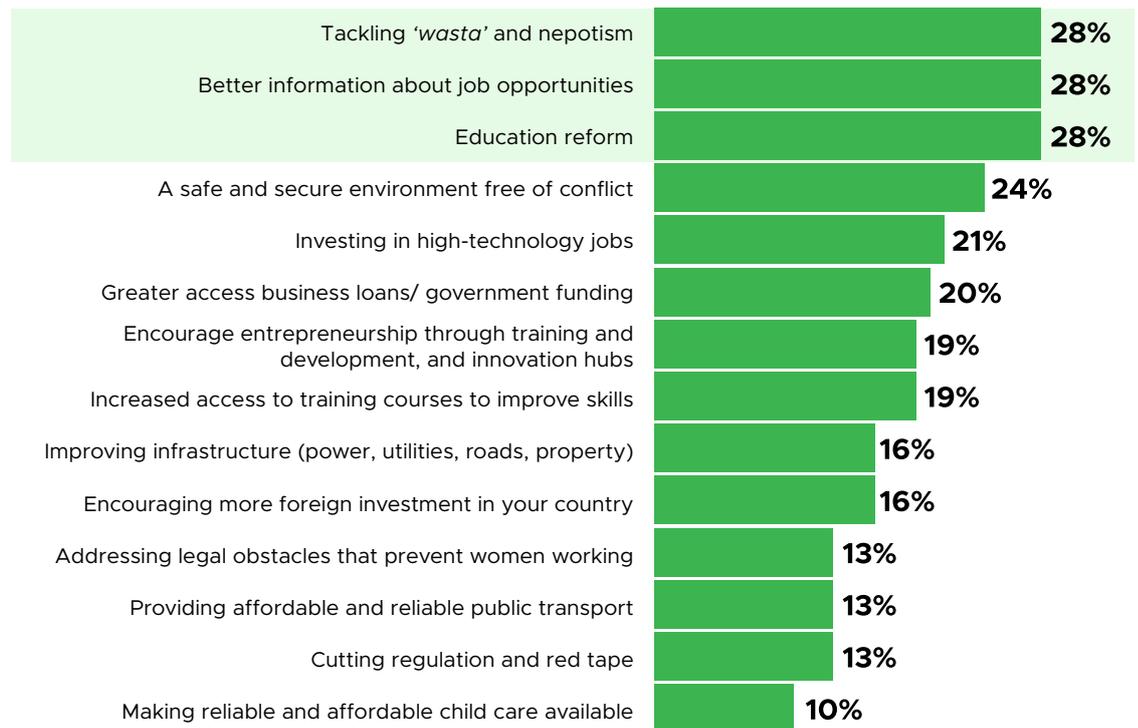


With their trust in government policies to address their issues, young Arabs are hopeful for a better future

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

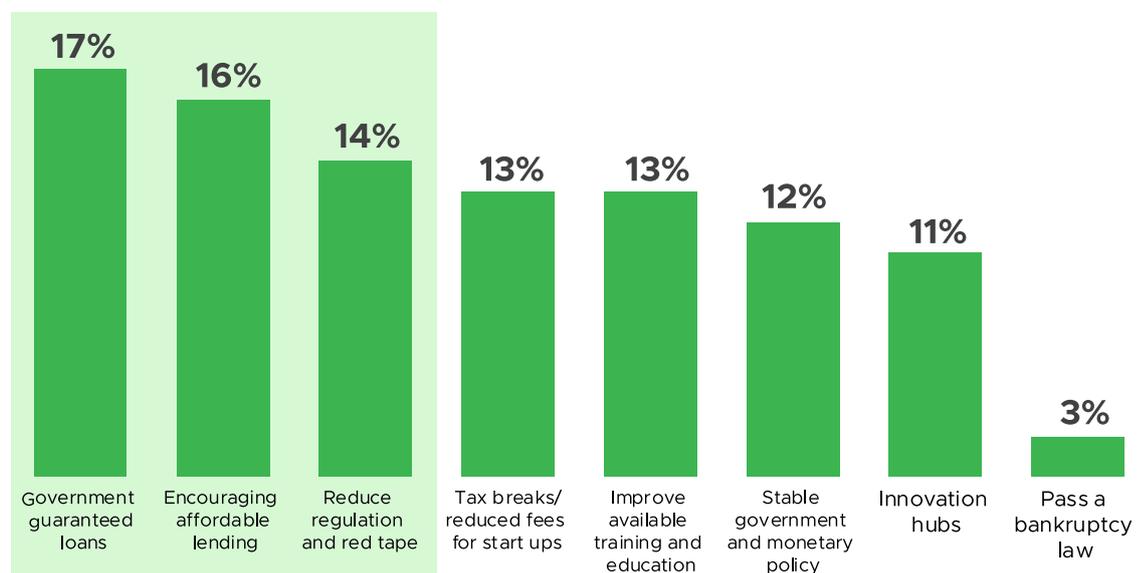
Job creation is certainly one way to win the favour of Arab youth, who pinpoint three strategies to achieve this in the 2021 survey: tackling nepotism, providing more information on the job opportunities available, and education reform. They also expect governments to help them start their own businesses by providing more access to affordable financing and reducing red tape.

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



## To promote entrepreneurship, Arab youth expect more government support, affordable lending and reducing red tape

What should government do to promote entrepreneurship?



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# A better future through better policies



**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 with 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.

**T**he 2021 ASDA'A BCW Arab Youth Survey provides a unique opportunity to gauge the impact of the pandemic on Arab youth, on their perceptions about current economic and social conditions and their expectations about the future. The main question this year is how the severe economic recession that ensued the COVID-19 outbreak could threaten the economic opportunities and aspirations of young Arabs for the coming years.

The 2021 survey represents a real call for action for the Arab policymakers. The good, somewhat unexpected, finding of the survey is that the pandemic has not shattered young Arabs' confidence about a better future. This greater optimism and positive forward-looking sentiment provide a unique window of opportunity to shape a transformational recovery by pushing ahead the long-awaited reforms needed to provide better opportunities to young people in the region.

This is why I call on policymakers, not only to mitigate the immediate impact of the COVID-19 crisis, but also to rethink the way growth should be engineered in the Arab region.

The survey found that the majority of the youth (60%) foresee brighter days ahead and are optimistic despite the pandemic, a greater share than last year (50%). In spite of the hardship experienced over the last year, Arab youth still believe in the prospect of an improvement of their lives: about half of respondents think they will have a better life than their parents,

the highest in three years. Many are anticipating a fast recovery and quick normalisation from last year's crisis, and a greater share want to take risks and develop new ventures and start-ups within the next five years. Noticeably, a smaller share of respondents (33%) is considering emigrating to another country compared to the last survey (42%). While it is too early to be definitive, the decisive policy responses by policymakers in the region to protect the populations, such as in the UAE, Morocco and Saudi Arabia may have played a role in the improved optimism evident in the survey.

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**I believe a new model of development and indeed a new social contract is needed. To succeed, they should place the youth issue at the core of the structural reform agenda required to build more resilient, sustainable and inclusive economies.**

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Indeed, not all countries share the same optimism, and the 2021 survey continues to reveal large disparities between respondents in the GCC, North Africa, and Levant. In particular, even if there is an improvement relative to last year, respondents in the Levant continue to hold less positive views about the future, reflecting the serious ongoing economic and social challenges faced by many countries in that region.

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## The 2021 survey represents a real call for action for the Arab policymakers. The good, somewhat unexpected, finding of the survey is that the pandemic has not shattered young Arabs' confidence about a better future. This greater optimism and positive forward-looking sentiment provide a unique window of opportunity to shape a transformational recovery by pushing ahead the long-awaited reforms needed to provide better opportunities to young people in the region.

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The positive news of resilient optimism in the face of the health and economic crises does not mean that some of the longstanding issues affecting Arab youth have become less relevant. Lack of jobs continue to be a key concern, and still 20% of the young who lost their occupation (or had someone in their family who lost his) due to the COVID-19 crisis say they are still unemployed. Anxiety about the high cost of living remains widespread, especially in the Levant region, boosted by concerns about a pick-up of inflation and further increases in the debt burden and cost of education. A worrying finding from the survey is that the already large regional gender gap appears to have worsened with the crisis: 40% (compared to 25% last year) of young Arab women say men have more rights than them and 44% (compared to 35% last year) say men have more job opportunities.

I believe a new model of development and indeed a new social contract are needed. To succeed, they should place the youth issue at the core of the structural reform agenda required to build more resilient, sustainable and inclusive economies.

This reform agenda would need to prioritise progress in a number of key areas:

- **Preserve macro-economic stability.** Many economies in the region are still grappling with the impact of the pandemic and face a legacy of weaker fiscal positions and greater inflationary risks (mainly from the emergence of supply side bottlenecks, both at home and globally). Adopting the right fiscal and monetary policy-mix to deal with these short-term vulnerabilities is a pre-condition for ensuring both a sustainable economic recovery and a successful continuation of structural reforms.
- **Invest in talent and improve business environment.** A significant share of Arab youth finds it difficult to enter (formal) labour markets, both because the education and training systems are not well geared to provide for the skills demanded, but also on account of the numerous obstacles to entrepreneurship (including from limited access to finance, burdensome regulatory frameworks, and inefficient labour markets).

Increasing the number of job opportunities in the private sector will require reforms that improve the quality of education and reduce labour mismatches and lower the barriers that stop new firms from entering markets and prevent existing small businesses and startups from growing in scale.

- **Revamp social protection systems.** The decision from many Arab governments to expand the reach of their social safety nets last year helped mitigate the impact of the pandemic on the most vulnerable (including many young people who lost their jobs). Going forward, the social compact in the region will need to be redesigned so as to respond to the legitimate aspiration of Arab youth for a more efficient and equal access to basic services (like health care, education, and targeted forms of support as they look for jobs or set up a family).
- **Strengthen the trust in institutions.** The survey confirms that many young Arabs continue to see nepotism and corruption as a fundamental obstacle to social mobility and inclusive labour markets. Renewed efforts to fight corruption and to ensure a more transparent and efficient provision of public goods and services would reassure them that the “game is not rigged”, and that opportunities are open to all who seek them.
- **Promote digitalisation.** Urgently stepping-up digitalisation and investing in new technologies will foster change and inclusion, with young Arabs (and in particular young women) who stand the most to benefit from the new opportunities associated with remote working, online learning, digital finance and e-commerce.

This is undoubtedly a very ambitious agenda, one that if implemented without delay would most likely yield tangible results only in a few years' time. But this should not deter policymakers from beginning a new season of reforms. The positive sentiment and optimism of many young Arabs should not be disappointed. Policymakers should act now and respond with concrete measures and reforms to consolidate their hope for a brighter and more prosperous future.



# 5

## IDENTITY

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



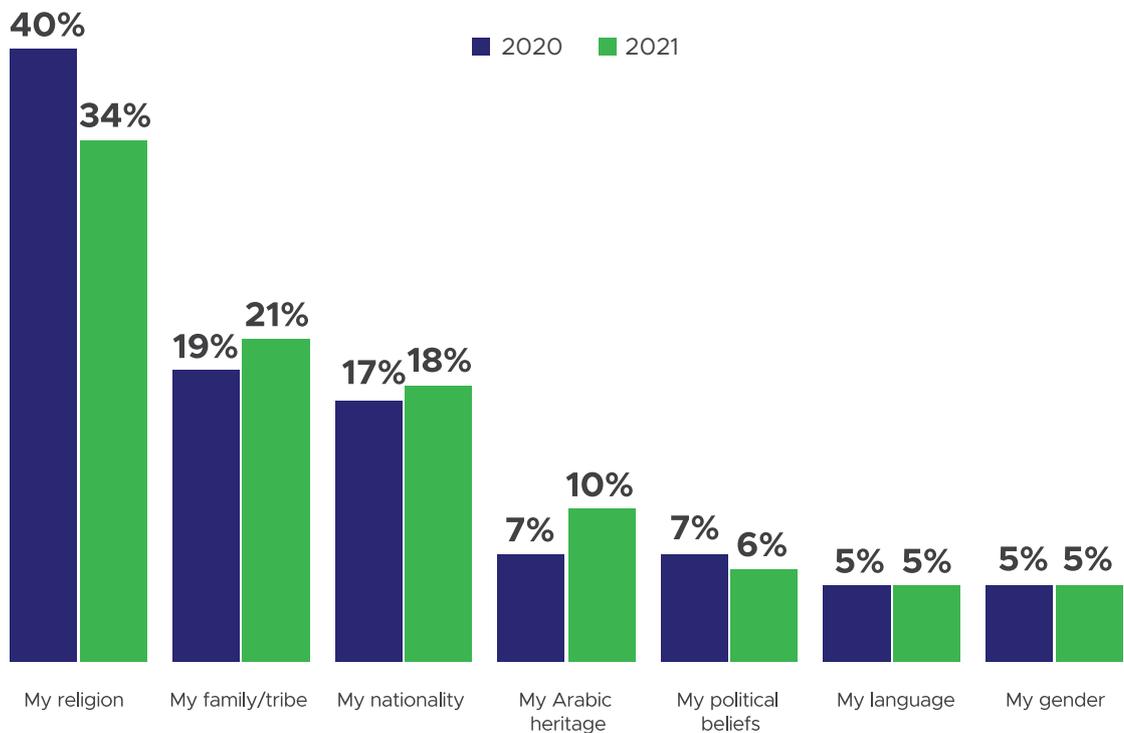


Religion is still important to young Arabs in defining their personal identity but factors such as family/tribe and nationality are gaining prominence

While undoubtedly still important to them, fewer young Arabs cited the role of religion in forging their personal identity, according to this year's findings. A third of respondents overall (34%) said that religion was 'most important' to them, down from 40% last year. Meanwhile, considerations such as family and tribal loyalties (21%), national identity (18%), and Arabic heritage (10%) are becoming more influential.

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

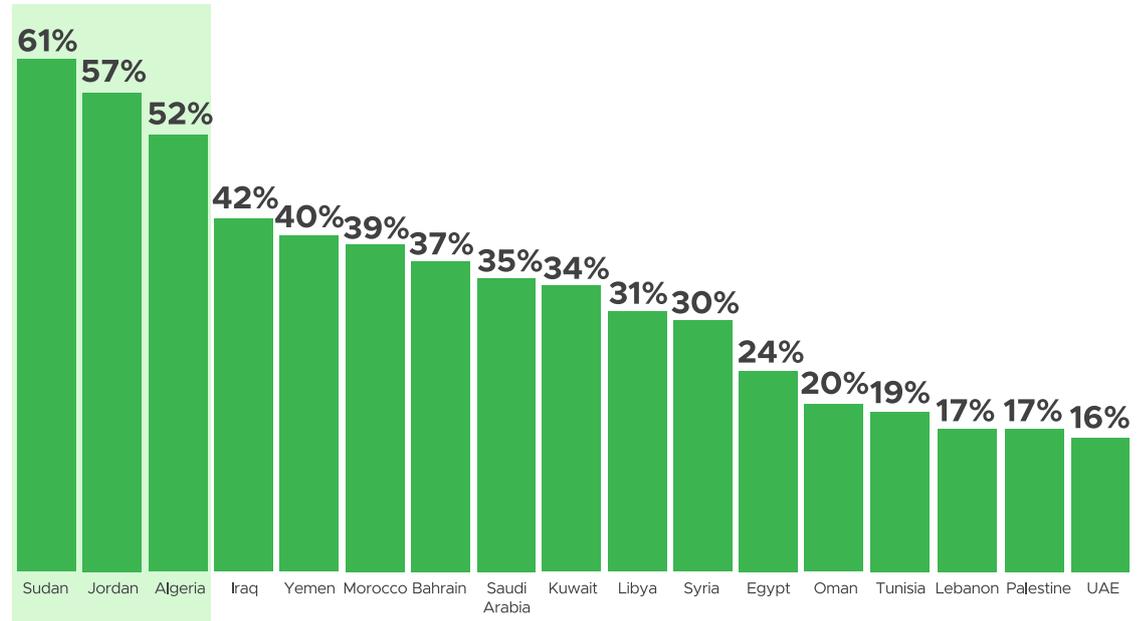
Which of the following is most important to your personal identity?



## 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')



Perceptions of the importance of religion vary widely among Arab youth. At one end of the spectrum, religion is central to the personal identity of 61% of young Sudanese, 57% of young Jordanians, and 52% of Algerian youth. At the other end, religion is key to less than a fifth of Lebanese, Palestinian and Emirati youth.

Interestingly, in Saudi Arabia, barely a third of young Saudis (35%) view their religion as 'most important' to their personal identity.

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# 35%

Young Saudis who say religion is most important to their identity

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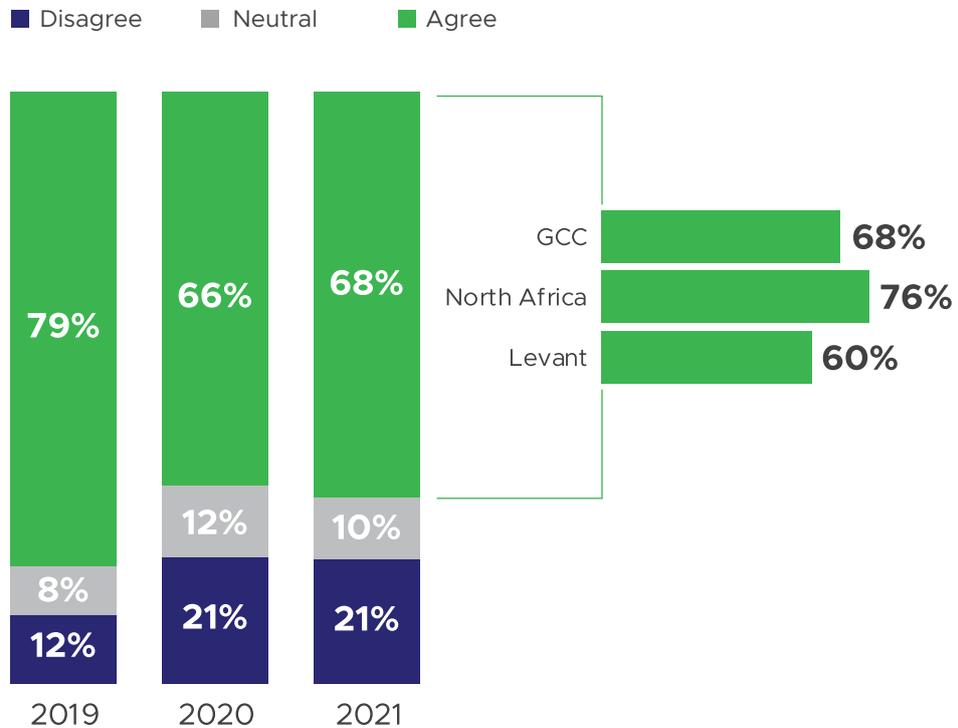


More than two-thirds of respondents in the GCC, the Levant and North Africa agree that religious institutions need reform. This was one of the top findings of the survey in 2019, when a majority of young Arabs agreed with the statement, 'The Arab world needs to reform its religious institutions'. This prompted the late Syrian philosopher and author Mohammad Shahrour to write in his expert commentary for the Arab Youth Survey white paper that "in the face of modernity, young Arabs find themselves in an intellectual vortex,

with old religious thoughts presented to them under the guise of heritage – ideologies that are rigid, closed, and opposed to any modernising force, dismissing all that is new and unfamiliar as hearsay. The interpretation of religion that was passed down to the youth is simplistic, inflexible, and retrogressive."

## Over two-third 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?



“Nationality is easily the overriding force that defines identity. This is so because [in the UAE] we have built an open and inclusive society that embraces modernity, while valuing tradition, culture, and religion. We encourage creativity and collaboration across cultures and all faiths, between men and women, amongst Emiratis and non-Emiratis.”

**H.E. Yousef Al Otaiba**, Ambassador of the UAE to the US and UAE Minister of State

(Ref. Page 48)



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# An invigorated identity for Arab youth



**H.E. Yousef Al Otaiba**

His Excellency Yousef Al Otaiba formally took up his post as the Ambassador of the United Arab Emirates (UAE) to the United States on July 28, 2008. He was promoted to UAE Minister of State in 2017. Ambassador Al Otaiba has led efforts to strengthen UAE-US relations through increased cooperation, particularly in the economic and security arenas. His leadership has been instrumental in finalising the US-UAE 123 Agreement for Peaceful Civilian Nuclear Energy Cooperation (2009), the hosting of the Special Olympics World Games in Abu Dhabi (2019), and facilitating the historic UAE-Israel normalisation agreement (2020). His involvement in the Abraham Accords led to his inclusion on TIME's list of the 100 Most Influential People of 2020.

**D**iplomacy is an interactive profession. We talk and listen, teach and learn, negotiate and debate. Our work requires attention to detail, an understanding of policy complexity and a sensitivity to cultural nuances. We must be dynamic on a daily basis, constantly amassing new knowledge while demonstrating flexibility in our assumptions.

At its core, however, when all the intricacies of our profession are stripped away and the diplomatic protocols are removed, we are storytellers.

We transport Emirati experiences and Arab perspectives from the Arabian Gulf and bring them to the halls of Congress and inside the Oval Office, to university campuses and art galleries, to boardrooms and neighbourhood soccer pitches. We give these Arab narratives life and colour.

My joy in sharing these insights is rooted in constantly studying the nuanced identity of Arab youth. It is a daunting task to convey their dreams and aspirations, challenges and fears to American audiences. There is so much complexity here.

#### **What shapes the identity of Arab youth?**

For Arab youth, what drives their identity? Is it religion or nationality? Family and tribe or Arabic heritage? Politics, language, or beliefs? The answer is not uniform: Diversity within the Arab world yields an assortment of responses. Some see faith as the dominant aspect of their life, whereas others focus on the family unit. These are the two most prevalent views among Arab youth, making for an enriching patchwork of ideas and experiences.

In the UAE, the answer is more straightforward – and highly illuminating.

Nationality is easily the overriding force that defines identity. This is so because we have built an open and inclusive society that embraces modernity, while valuing tradition, culture, and religion. We encourage creativity and collaboration across cultures and all faiths, between men and women, amongst Emiratis and non-Emiratis.

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**We see the UAE as offering a positive, future-oriented vision for the region; an outlook which champions community and the creative spirit, while rejecting extremism and factionalism. This model is appealing for young Arabs who desire to live in a region that is changing for the better. There is indeed a hopeful way forward; a model of coexistence, educational, and economic opportunity exists close to home for many Arab youth.**

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There is a melting pot quality embedded within the country's social fabric. We see the UAE as offering a positive, future-oriented vision for the region; an outlook which champions community and the creative spirit, while rejecting extremism and factionalism.

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**Our people crave diplomacy, de-escalation, and dialogue. They want the UAE to shape events and outcomes, to lead with friends and like-minded partners. For nearly their entire lives, Arab youth have witnessed chaos and disorder, fragile states collapsing into failed ones and extremists profiting off of lawlessness. They reject this failed reality.**

This model is appealing for young Arabs who desire to live in a region that is changing for the better. There is indeed a hopeful way forward; a model of coexistence, educational, and economic opportunity exists close to home for many Arab youth.

They see it in the Emirates. It is tangible, not aspirational. What's more, the establishment of a UAE Minister of State for Youth Affairs and a portfolio dedicated to this agenda sends an unambiguous message: The voices of Arab youth matter here.

#### **Exploring the sociocultural contours**

As a UAE diplomat who converses with US decision makers often, these are critical reflections to convey in explaining where the Middle East stands today and what sociocultural contours will shape the region's future.

The data reflected in the 13th ASDA'A BCW Arab Youth Survey indicates a shift is pulsating within the region; one that bends toward a more hopeful outlook for our youth, yet confirms a series of profound changes currently underway.

A rising spirit of nationalism is gaining resonance for Arab youth. This generation is increasingly looking inward at their Arab brethren for leadership. A growing self-reliance on ourselves, especially model Arab nations like the UAE, is fueling this pride.

Our people crave diplomacy, de-escalation, and dialogue. They want the UAE to shape events and outcomes, to lead with friends and like-minded partners. For nearly their entire lives, Arab youth have witnessed chaos and disorder, fragile states collapsing into failed ones and extremists profiting off of lawlessness. They reject this failed reality.

This newfound attitude is coupled with findings that two-thirds of respondents are seeking reform of religious institutions. Last year, 40% of Arab youth saw religion as central to their identity; this year, that figure dropped to 34%.

It affirms that religion remains a powerful force within Arab society, but in a world where our youth are dynamic, entrepreneurial, and technologically connected, nothing can remain static, not even religion.

#### **UAE – a model for the region**

Here too, I look to the UAE as a workable model for our region. The UAE is home to 200 different nationalities, more than 40 churches, and approximately 700 Christian ministries. Hindu and Sikh temples are thriving; there is a Buddhist temple too in Dubai. The Jewish community is vibrant and growing with kosher food now available at many UAE hotels.

We recount Pope Francis' historic 2019 visit to the Arabian Peninsula, the first for any pontiff. An estimated 180,000 people attended the open-air mass, a gathering which highlighted religious fraternity and was punctuated by a homily filled with Jesus' teachings. The Head of the Catholic Church participated in an interfaith forum with the Muslim Council of Elders and other religious leaders. He also met with Sheikh Ahmed el-Tayeb, the Grand Imam of Cairo's Al-Azhar, Sunni Islam's foremost religious institution.

Construction of the Abrahamic Family House has commenced in Abu Dhabi. This facility will allow Christians, Muslims, and Jews to worship side-by-side in three distinct sanctuaries that reflect the religious sensibilities of the Abrahamic faiths. Abu Dhabi will also have its first Hindu temple soon.

This unique alchemy twinning pride in national identity with a spirit of religious pluralism is foundational for the storytelling UAE diplomats share with audiences here in the US and throughout the world.

As the UAE celebrates Expo 2020 Dubai and marks the Golden Jubilee of our nation's formation in December, we feel hope for the future, which coincidentally is the title of this year's Arab Youth Survey.

That is a sentiment I will gladly continue to promote.

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# 6

## MODEL NATIONS

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







One of the most eagerly awaited findings of the annual ASDA'A BCW Arab Youth Survey is the nation Arab youth say they most want to live in and their own country to emulate. For the 10th consecutive year since the question was introduced in the survey, the United Arab Emirates (UAE) has taken pole position.

Located at the crossroads between the eastern and western hemispheres, and home to more than 200 different nationalities, the UAE has long been regarded as a beacon of hope and stability in a region more readily associated with political turmoil and conflict. And the UAE continues to surpass expectations in more recent times, particularly for its ability to withstand the economic shocks arising from COVID-19.

As anyone visiting the Expo 2020 Dubai currently being hosted in the UAE will testify, the country is reinventing itself as one of the most strategic global hubs. At the same time, it is strengthening multilateral ties and forging closer bonds with neighbouring countries, including Israel, with whom it normalised relations under the historic Abraham Accords in 2020.

As Hussein Ibish, Senior Resident Scholar at the Arab Gulf States in Washington, observes, the UAE is today promoting “a new Arab model of how government and society should interact with individuals and communities based on pluralism, tolerance and diversity.”

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### All-round excellence

The UAE ranks 16th in the World Bank's Ease of Doing Business Report, 25th in the World Economic Forum's Global Competitiveness Report, and 15th in the Kearney FDI Confidence Index for foreign direct investment (and No. 1 among Arab world countries).

According to the IMD World Competitive Yearbook, it tops global indicators for the absence of red tape and the adaptability of government policy. The annual Agility Emerging Markets Logistics Index rates it the most competitive market in the GCC, while Transparency International places it among its top 25 least corrupt nations.

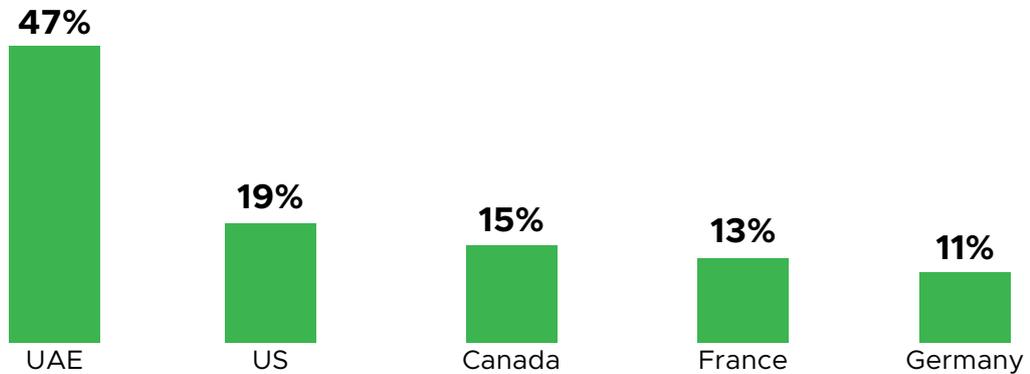
The UAE also performs well on social indicators, including literacy, primary education enrolment and gender inclusion. Accordingly, it is the highest ranked Arab country in the World Economic Forum (WEF) Global Gender Gap Report 2021.

According to the IMD World Competitive Yearbook, it tops global indicators for the absence of red tape and the adaptability of government policy. The annual Agility Emerging Markets Logistics Index rates it the most competitive emerging market in the GCC, while Transparency International places it in the top quarter of its least corrupt nations.

**For the 10th consecutive year, the UAE is named as 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

**A model for economic diversification**

While the UAE has prospered from its immense hydrocarbon resources, holding the world’s sixth largest oil reserves, it was the first country in the Arabian Gulf to actively pursue an economic diversification strategy.

As the first Arab signatory of the Paris Agreement, it has set ambitious renewable energy and energy efficiency targets, as part of wide-reaching commitments to slash carbon emissions by a quarter by 2030 and achieve net zero carbon emissions by 2050. It is also determined to play a leading role in the new digital economy, unveiling the world’s first graduate university dedicated to artificial intelligence in 2019.

The UAE’s limitless aspirations clearly resonate with the hopes of Arab youth. Nearly half of young Arabs (47%) in the 2021 survey said that the country was the one in the world they would most like to live in, followed by the US (chosen by 19%), Canada (15%), France (13%) and Germany (11%).

While the UAE has prospered from its immense hydrocarbon resources, holding the world’s sixth largest oil reserves, it was first the country in the Arabian Gulf to actively pursue an economic diversification strategy.

**47%**

Young Arabs said the UAE is the country they would most like to live in



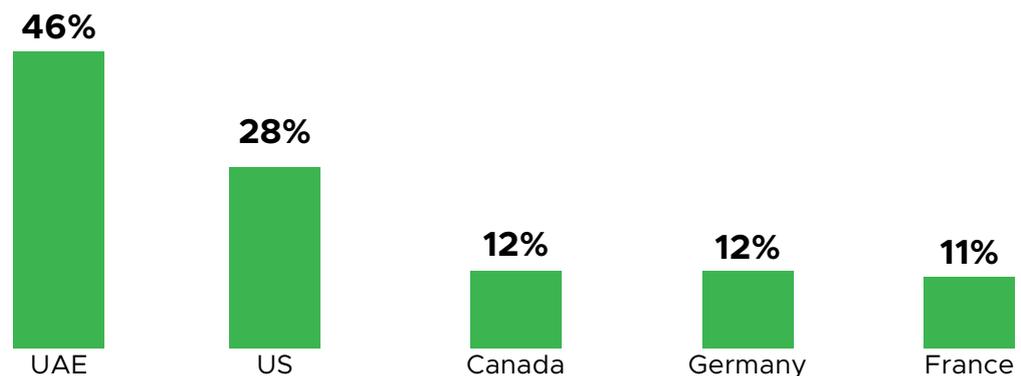
The appeal of the UAE as the best place to live was strongest among Sudanese youth (66%) and young Egyptians (65%). More than half of young Iraqi, Saudi, Algerian and Lebanese nationals also said it was their preferred country in which to live.

Around half of the survey's cohort (46%) also said the UAE was the one they most wanted their own country to be like, followed by the US (28%), Canada and Germany (both cited by 12% of respondents), and France (the choice of 11% of interviewees).

### UAE is also the nation most young Arabs want their own countries to emulate, 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

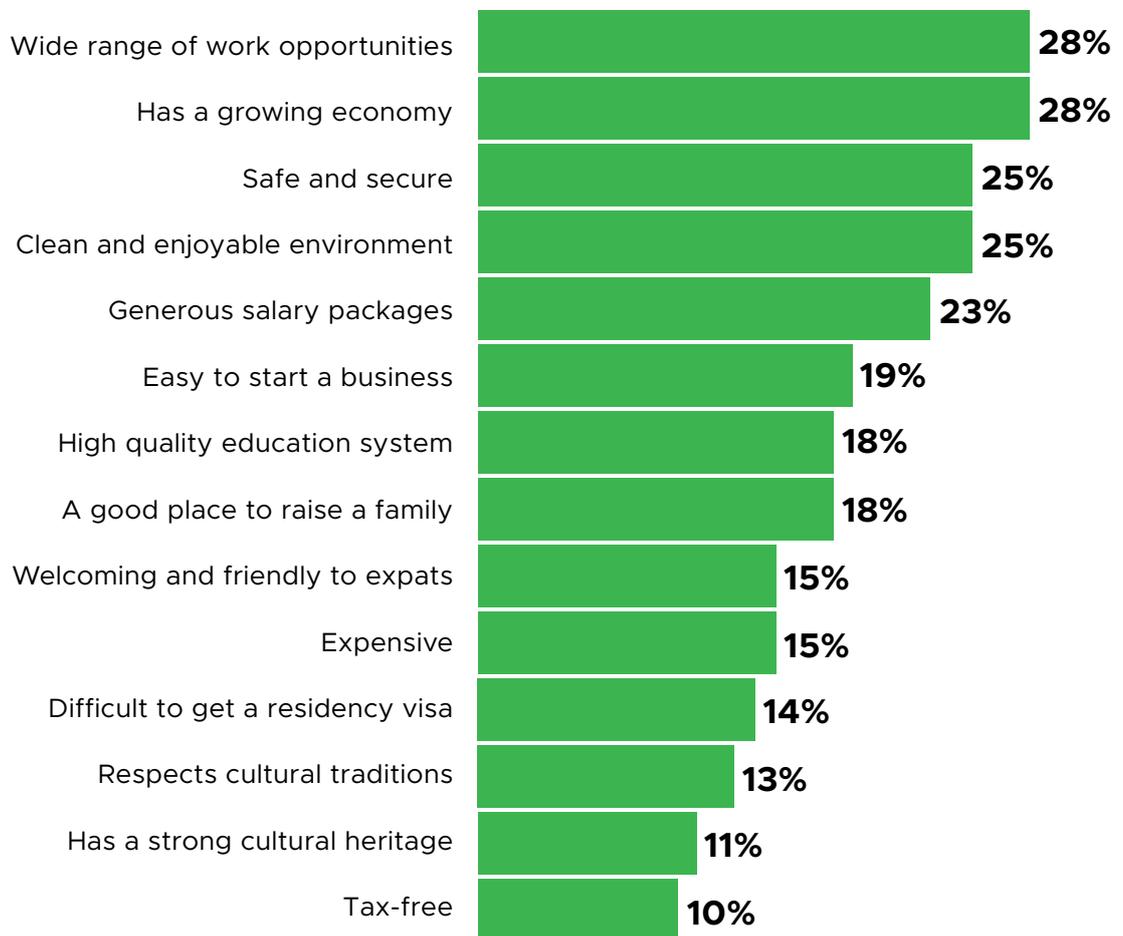
## Arab youth most associate the UAE with its growing economy and range of work opportunities

When asked why, Arab youth point to the country's growing economy, its buoyant job market, its crime-free environment, and the availability of well-paid jobs.

Nineteen per cent of young Arabs also identified the ease of starting a business there, while 18% said it was a good place to raise a family, with quality schools and colleges.

While the UAE celebrates its 50th anniversary this year, the nation's leadership is already aiming to the country becoming the best in the world by the time of its centennial in 2071.

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



While the UAE celebrates its 50th anniversary this year, the nation's leadership is already aiming to the country becoming the best in the world by the time of its centennial in 2071.



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# Young Arabs and the UAE model: An enduring aspiration



**Afshin Molavi**

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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 Emerging World newsletter.

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**W**hat makes a nation great? Political scientists, philosophers, pundits, and populist leaders regularly debate this question. Economic power, say some. Military might, cry others. Prosperity and freedom, others declaim. A combination of all three, still others suggest.

Let the debate rage on, but two questions that should always be considered are these: how do other people view your nation? And: If borders were free, how many would flock to live in your country? On both of those scores, the United Arab Emirates (UAE) ranks far ahead of the region in the minds of Arab youth.

The ASDA'A BCW Arab Youth Survey has regularly asked young Arabs the following question: If you could live anywhere in the world, where would you live? For the tenth year in a row, the answer was the same this year: the UAE. In fact, the UAE has widened its lead in this category over the number two most sought-after destination to live, the United States (47% vs 19%). Coming in third, fourth, and fifth respectively are Canada (15%), France (13%), and Germany (11%). The UAE's lead is all the more striking given that not a single other Arab country made the top five of aspirational places to live.

The AYS also asked Arab youth across the region another straightforward question: which country in the world, if any, would you like your country to be like? Once again, the answer has been the same for the past decade: the UAE. Some 46% of Arab youth chose the UAE as their model nation, while 28% chose the United States, followed by Canada (12%), Germany (12%), and France (11%).

The US narrowed the gap with the UAE slightly in the "model nation" category, but it's still a distant second.

These are striking numbers that deserve wider attention. After all, if a English football club won the Premier League ten years in a row, or a company achieved a decade of industry dominance, or a tennis player won ten Grand Slams in a row, we would all sit up and take notice. A cottage industry of 'lessons learned' books and articles and conferences would emerge.

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**Over the past 13 years, a perennial theme of the ASDA'A BCW Arab Youth Survey has been the story of a pragmatic generation, unswayed by the chest-thumping populists, eager for opportunities for work and self-betterment, and hungry for changes in the dysfunctional systems that pervade their governments. While some have described Arab youth as "the burned generation" – burned by poor governance and mismanagement and predatory rulers and corruption – it's also a pragmatic generation with energy and vision and creativity that can not only change their own country, but the whole world, if given an opportunity.**

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**Rather than look for models, however, the world needs lodestars, and the UAE has emerged as one. Every region also needs intense competition, and a leader of the pack. The UAE has clearly raised the bar across the region as it has emerged as a global economic hub for trade, transport, tourism and, increasingly, technology. Riyadh is eager to take on the UAE in some of these fields, as are others across the region. Let the competition begin: this will be good for the entire region.**

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#### **Learning from the UAE's leadership**

So, what are we to learn from the UAE's leadership in this category over a decade? Let's start with what Arab youth say about the country. When asked what they associate with the UAE, their answers fall into what might be categorised as two buckets: opportunity and stability.

The top five things that Arab youth associate with the UAE are: "a growing economy" (28%), "a wide range of work opportunities" (28%), "a clean and enjoyable environment" (25%), "generous salary packages" (23%), and a place that is "easy to start a business" (17%). They also cited high-quality education, respect for cultural traditions, a good place for expats, while also noting that they saw it as expensive and difficult to get a residency visa.

#### **A pragmatic generation**

What do these answers tell us? Over the past 13 years, a perennial theme of the ASDA'A BCW Arab Youth Survey has been the story of a pragmatic generation, unswayed by the chest-thumping populists, eager for opportunities for work and self-betterment, and hungry for changes in the dysfunctional systems that pervade their governments. While some have described Arab youth as "the burned generation" – burned by poor governance and mismanagement and predatory rulers and corruption – it's also a pragmatic generation with energy and vision and creativity that can not only change their own country, but the whole world – if given an opportunity.

Over a quarter of a century, I have visited the UAE regularly, and have come to appreciate its role as a lodestar for aspiring middle classes and educated professionals from Cairo to Karachi, from Durban to Delhi. Across the Arab world, Dubai is the place where you might get your first big consulting job, or scale your start-up, or launch your graphic design firm. In Abu Dhabi, you might find a job in a world-class financial or healthcare or educational institution,

building your first networks, growing your confidence, and catapulting you to your next job.

#### **The UAE is a lodestar**

If you compared most global polling to the Arab Youth Survey, you would see striking similarities in outlooks, aspirations, hopes, and fears. Young people around the world want better governance, less corruption, opportunities for education and employment, and secure and healthy environments. While it's hard to gauge the relative "nationalism" of this generation of youth, one thing is clear: there are few traces of exclusivist, blood-and-soil nationalism.

When asked about a "model nation," the UAE finding fits consistently with the response to where one would choose to live. The reality, however, is that it's difficult for any nation to choose another as "a model." There are aspects of the UAE experience that could benefit Egypt or Sudan (two countries where youth overwhelmingly favour the UAE as their preferred living destination), but socio-economic and population and historic differences far outweigh simple models.

Rather than look for models, however, the world needs lodestars, and the UAE has emerged as one. Every region also needs intense competition, and a leader of the pack. The UAE has clearly raised the bar across the region as it has emerged as a global economic hub for trade, transport, tourism and, increasingly, technology. Riyadh is eager to take on the UAE in some of these fields, as are others across the region. Let the competition begin: this will be good for the entire region.

Maybe, one day, the UAE will even be knocked down the list of places where Arab youth would like to live, by a rising Arab world country. That, too, should be welcomed as a sign of success for a region – and a youth – who surely deserve it.

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# 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





The Middle East witnessed a decisive geopolitical shift on September 15, 2020, when Israel, the UAE and Bahrain, with strong cross-party support in the United States, announced the normalisation of ties under the historic agreements collectively known as the Abraham Accords.

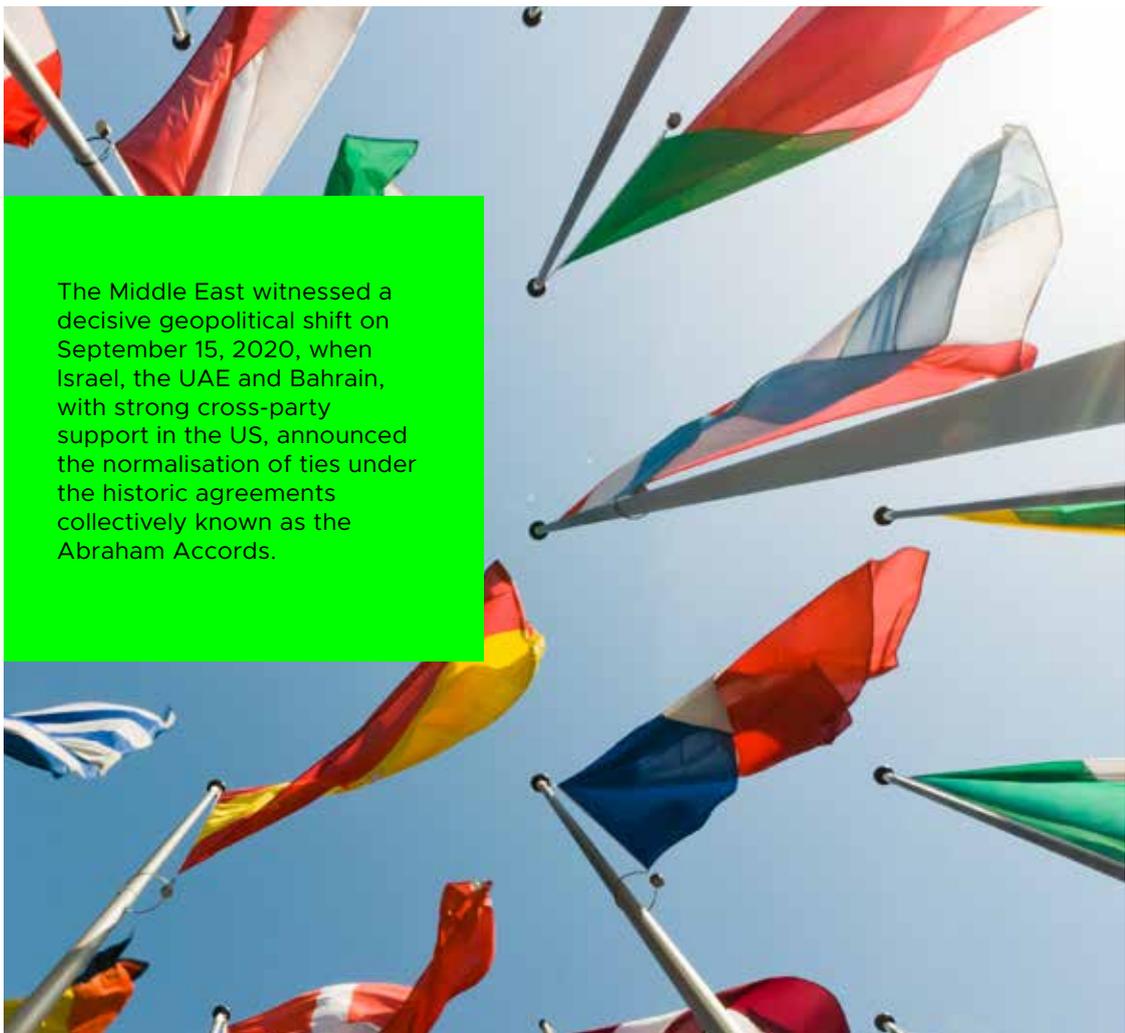
The Abraham Accords Declaration marked the first public normalisation of relations between an Arab country and Israel since that of Egypt in 1979 and Jordan in 1994. Morocco and Sudan soon followed the lead of the UAE and Bahrain, normalising ties with Israel in December 2020 and January 2021, respectively.

The Abraham Accords Declaration promotes interfaith and inter-cultural dialogue “to advance a culture of peace among the three Abrahamic religions and all humanity”.

It further reads: “We believe that the best way to address challenges is through cooperation and dialogue and that developing friendly relations among States advances the interests of lasting peace in the Middle East and around the world.”

Thomas Friedman, The New York Times opinion columnist, described the declaration as a geopolitical earthquake, adding that “there are really two coalitions in the region today — those who want to let the future bury the past and those who want to let the past keep burying the future. The UAE is taking the helm of the first...”

This fact notwithstanding, Palestinian demands for self-determination continue to overshadow the Middle East’s political landscape, with respondents to the 2021 survey again citing the conflict in the Palestinian territories among their top concerns.

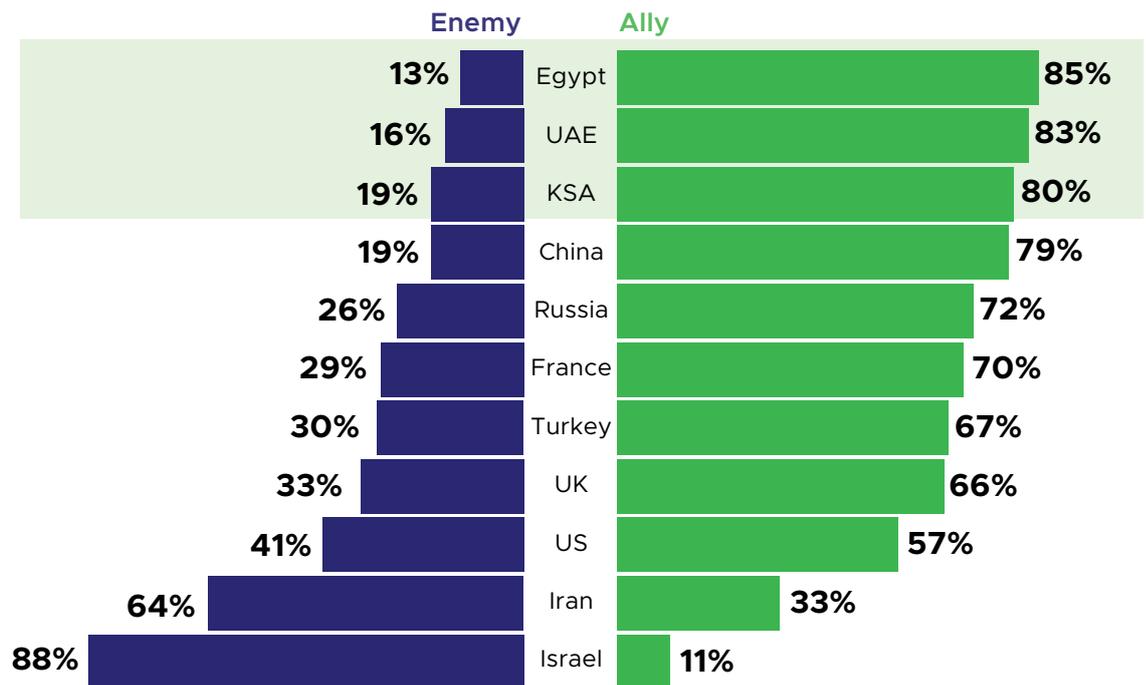


The Middle East witnessed a decisive geopolitical shift on September 15, 2020, when Israel, the UAE and Bahrain, with strong cross-party support in the US, announced the normalisation of ties under the historic agreements collectively known as the Abraham Accords.

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

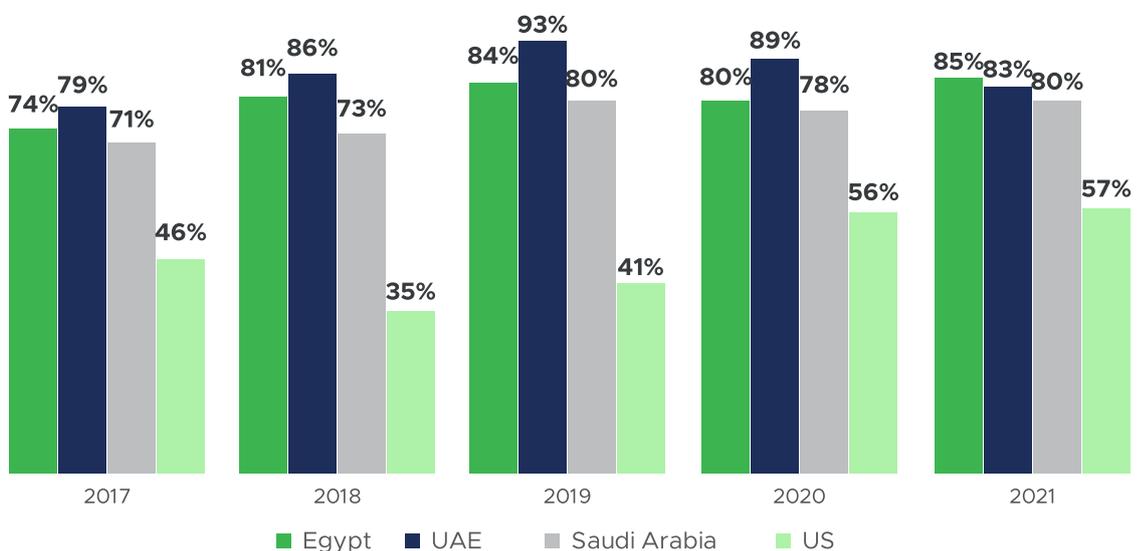
The triumvirate of Egypt, Saudi Arabia and the UAE are widely considered to be the region's strongest allies, with more than eight out of 10 respondents to the survey describing them as a strong ally or somewhat of an ally of their country. China and Russia are the region's fourth and fifth strongest allies, according to Arab youth, while the UK and the US rank eighth and ninth, respectively. Many Arab youth remain sceptical of closer ties with Israel, with barely 11% of interviewees regarding the country as an ally. In fact, they are far more likely to regard Israel as an enemy of their country than the Arabian Gulf's traditional adversary, Iran.

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



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

(Showing % answered 'Strong Ally' or 'Somewhat of an ally')



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

For better or worse, Arab youth continue to feel the presence of the US in regional affairs, with half of this year's cohort (51%) saying that the country has the most influence over the Arab world, followed by Saudi Arabia (29%) and the UAE (23%). The influence of European and former colonial powers continues to wane, with only a tenth of respondents believing the UK has the

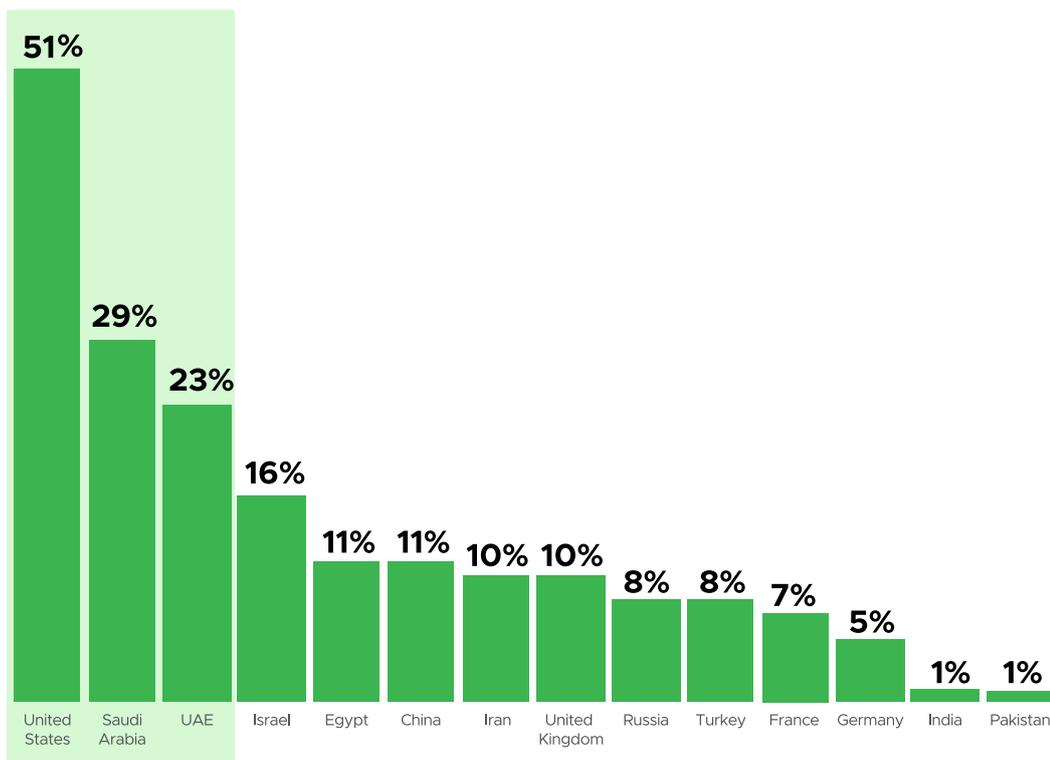
most or second most influence in the region, followed by Russia (8%), Turkey (8%), France (7%) and Germany (5%).

The true impact of these countries is moot, but as the journalist, author and political analyst Kim Ghattas shrewdly observes, "perceptions of power matter greatly in geopolitics."

## Young Arabs believe the country with the greatest influence 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 % answered 'Most influence' or 'Second most influence')



“China sits at the top of the list of countries considered as allies by young Arabs, just below the UAE, Egypt and Saudi Arabia. However, only 11% of respondents believe China has any influence in the region. Sticking to the middle ground in the Middle East could prove difficult in the long term for China.”

*Kim Ghattas, journalist, author and analyst*

*(Ref. Page 66)*



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# The emerging US-China rivalry will add a new dynamic to regional foreign policy



**Kim Ghattas**

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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 is currently a contributing writer at the Atlantic magazine and a Non-Resident Senior Fellow at the Carnegie Endowment for International Peace. Previously, 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 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 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 is the chair of the board of directors of the Arab Reporters for Investigative Journalism (ARIJ).

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If American influence and power are on the wane as the news headlines proclaim you wouldn't be able to tell from the 2021 ASDA'A BCW Arab Youth Survey of opinion: young Arabs believe the US is still the country with the most influence in the region, trailed far behind by Saudi Arabia and the UAE.

If the talk is all about retreat and turning away from America, the survey shows that a small majority of young Arabs still see America as an ally.

These two data points - taken alone for now - are some of the most surprising findings in the survey.

Even as the Biden administration signals that it wants to de-prioritise the Middle East and focus on the competition with China and even as Saudi Arabia and the UAE take the lead on a large number of policies shaping the future of the region, it is hard to shake off the decades long reality and perception that the US is the key shaper and mover of all things Middle East.

Of course, influence does not necessarily mean positive impact. It can be tied to a sense of disempowerment — or an expression of hope. Some of the countries where the US gets the highest grades as a major influence are those where every move by the US can have a very direct impact on people's lives or sense of security, like in Iraq (79%) and Lebanon (59%) and more recently Sudan (49%).

Iraq and Lebanon are at heart of the regional struggle between Iran and its allies on the one hand and those pushing back against Iranian influence in the region.

The impact of sanctions on Shia militias and political groups like Hezbollah, or the assassination of leaders like Quds Force commander Qassem Soleimani reverberate instantly across communities.

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**Even as the Biden administration signals that it wants to de-prioritise the Middle East and focus on the competition with China and even as Saudi Arabia and the UAE take the lead on a large number of policies shaping the future of the region, it is hard to shake off the decades long reality and perception that the US is the key shaper and mover of all things Middle East.**

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Hence the expression of hope. Even as the US withdraws from Afghanistan (though the survey was conducted before the actual withdrawal, it was already on the horizon) and talks about withdrawing troops from Iraq and Syria, the sense of abandonment of some in the region does not shrink the majority of those who still see the US as an ally — in some cases precisely because it is a key player in the policies to confront and contain Iran, which is seen as an enemy by 64% of respondents.

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## As Saudi Arabia and the UAE develop closer ties with Beijing, they also know the US remains in many ways irreplaceable. They can therefore lead the way for a smoother competition between the US and China, at least in the wider Middle East.

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Although the fear for many was that the election of President Biden would usher in a softer approach to Iran, this has not borne out and it's relevant to note that the number of respondents who see America as an ally has in fact risen 10 points since 2017, from 46% under President Trump to 57% under President Biden.

Of note for countries like the UAE, which has signed the Abraham Accords, and Saudi Arabia which has been dancing around the possibility, is that 88% of respondent see Israel as an enemy.

If we unpack the numbers further, comparing it to how Saudi Arabia and the UAE fare in the survey, as well as Iran and China, we can detect interesting trend lines and opportunity for future policy making both by the US and its allies in the region.

China (at 79%) sits at the top of the list of countries considered as allies by young Arabs, just below the UAE, Egypt and Saudi Arabia (all in the 80 percentile). China's position in the list is a reflection of both its approach to foreign policy and its history with the region. As Beijing increases its involvement in the region, it is focused on funding large projects, including major infrastructure, from a new capital in Egypt to NEOM in Saudi Arabia and the Haifa port in Israel.

Unlike the US, Beijing steers clear of any values-based discussions around human rights, freedom of thought or elections, and its business-like approach appeals to regional governments, as well as the private sector — for now. But as a relative newcomer to the scene, compared to America, Beijing has also steered clear from regional politics, whether the Iran-Saudi rivalry, the Arab-Israeli conflict or the complex Iraqi politics. This has allowed China to avoid America's fate - loved and hated in equal measures — and allows it to bask in the positive light of an ally.

This does however mean that only 11% of respondents believe China has any influence in the region. Sticking to the middle ground in the Middle East could prove difficult in the long term for China.

Beijing's multi-billion dollar memorandum of understanding with Iran has already rattled some nerves and has been met with dismay by many inside Iran, where people still look to the US for inspiration and hope.

As the US contemplates its competition with China, it should anticipate how this will unfold in the region. Washington should be wary of Beijing's investments in the Middle East which often put the emphasis on projects that do not tangibly improve the lives of citizens. But Washington can look for ways to coordinate with its regional allies to direct a more positive Chinese input into a region that lags behind on many fronts, enabling the US to build onto this itself as President Biden promises a global version of the Build Back Better programme, addressing climate change, gender equity and other key aspects of development.

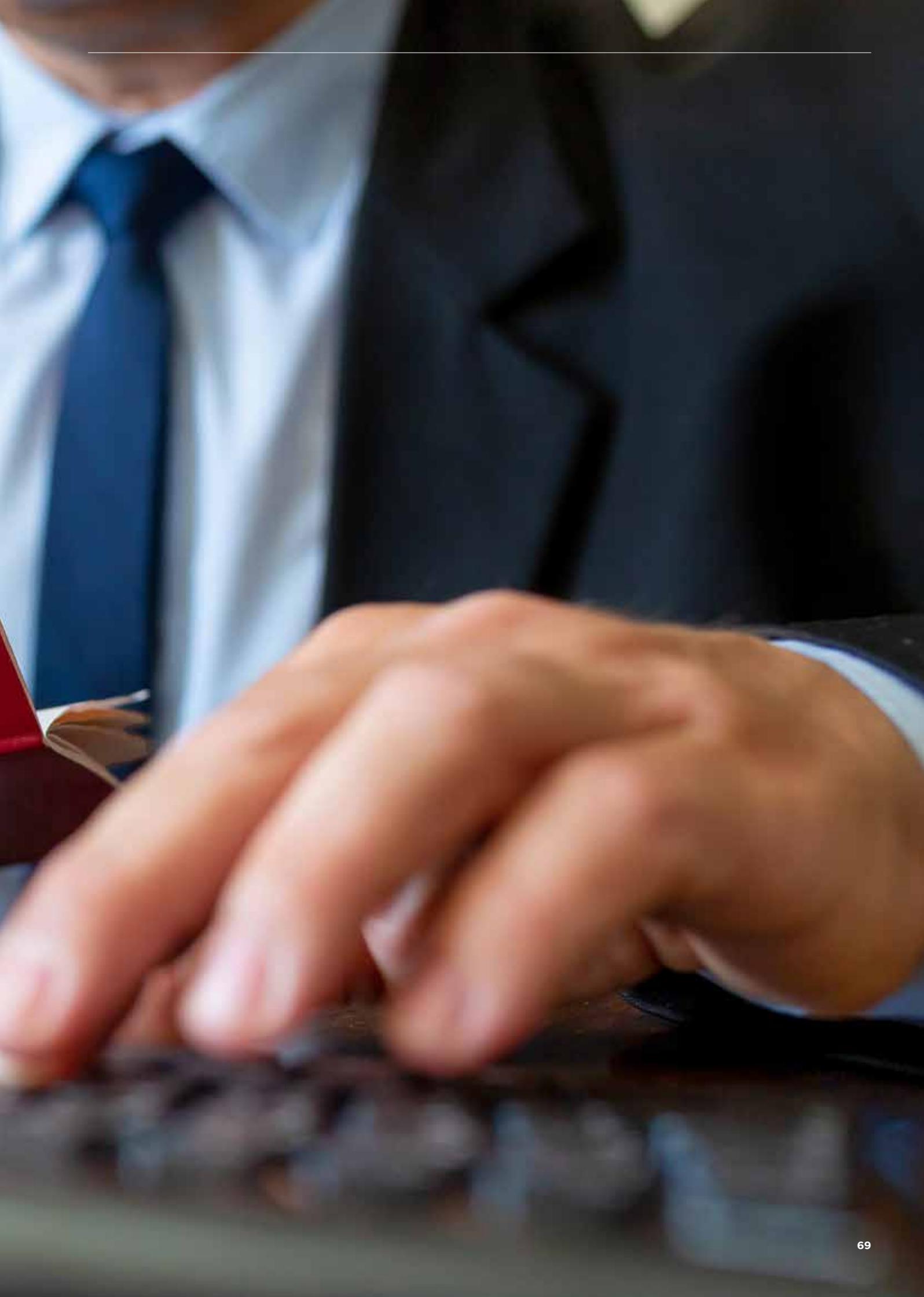
As Saudi Arabia and the UAE develop closer ties with Beijing, they also know the US remains in many ways irreplaceable. They can therefore lead the way for a smoother competition between the US and China, at least in the wider Middle East, one that helps to address challenges such as Iran's nuclear ambitions, via the P5+1 negotiations. More importantly they can help set the stage for investments and developments that can truly impact societies, from sustainable employment opportunities to tech advancements and climate change solutions and in doing so empower their citizens and give them a reason to stay in their countries.

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# 8

## EMIGRATION

Fewer young Arabs now consider emigrating despite the ongoing economic challenges in their home countries



One of the most disturbing findings of the 2020 ASDA'A BCW Arab Youth Survey was that nearly half of young Arabs were either actively trying to or had considered emigrating to another country.

His Highness Sheikh Mohammed bin Rashid Al Maktoum, UAE Vice President and Prime Minister and Ruler of Dubai, tweeted: "It is painful that half of our Arab youth wants to emigrate...It is painful when the Arab youth does not find a homeland, safety and livelihood in his homeland. If governments are corrupt, the country will be ruined, its security diminished and its people will want to leave it."

Last year's survey also highlighted three of the main triggers of emigration: high unemployment, economic mismanagement and conflict. Climate change is another factor behind mass migration from MENA, as the UN International Organisation for Migration observed in a 2020 report.

"Human mobility is inextricably linked to sustainable development," it said.

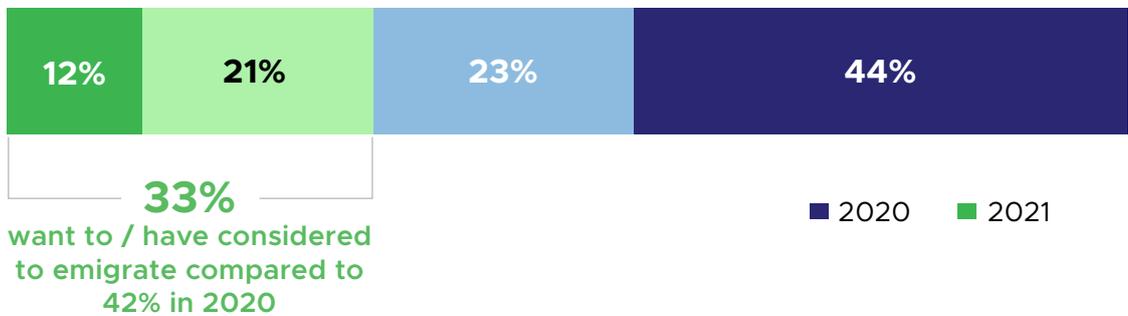
While the incentive for many Arab youth to emigrate may remain, the stringent movement restrictions imposed by national governments tackling the COVID-19 pandemic have inevitably dampened the hopes of those planning a new life abroad. The fear of violence and discrimination has also deterred many would-be emigrants.

This new paradigm is reflected in the 2021 research, which found that a third of respondents (33%) were either considering or had tried to leave their home country, a large proportion but a substantial drop from the 42% of Arab youth who said they wanted to emigrate in 2020.

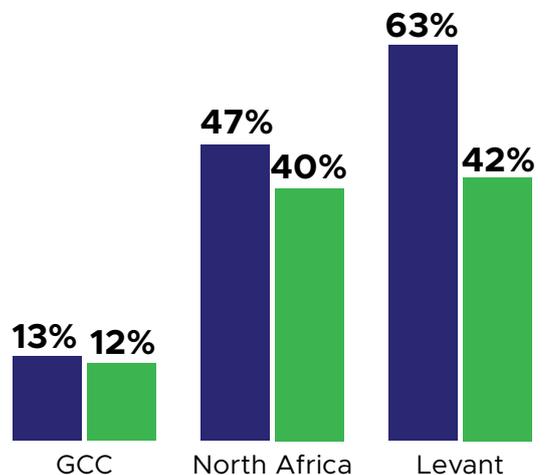
The percentage of young GCC citizens who said they were 'actively trying to emigrate' or had 'considered emigrating' remained low at 12%, down from 13% in 2020, while less than half (42%) of the young people interviewed in the Levant gave these responses, compared with 63% last year. Would-be emigrants also accounted for 40% of respondents in North Africa this year, a fall of 7% from 2020.

## The number of young Arabs considering emigration has decreased over 2020

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



- 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

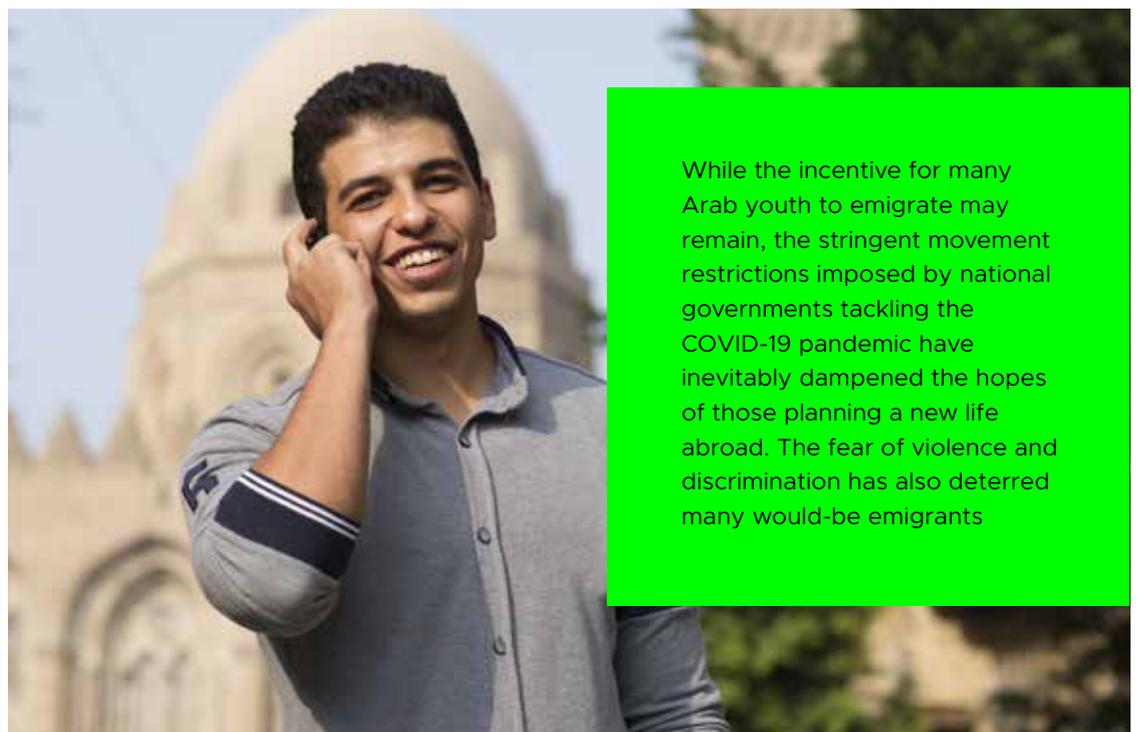
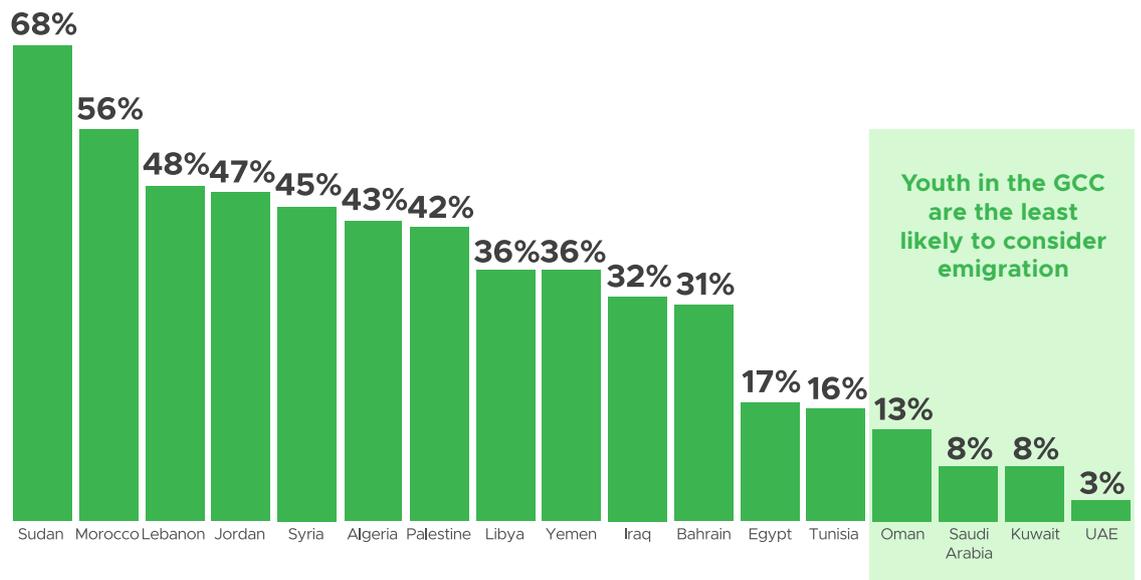


## Youth from Sudan, Morocco and Lebanon are among top potential emigrants

The determination of young people to seek new opportunities abroad remains strong, however, with two-thirds (68%) of young Sudanese interviewed in the survey, 56% of young Moroccans, and 48% of Lebanese youth resigned to 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)



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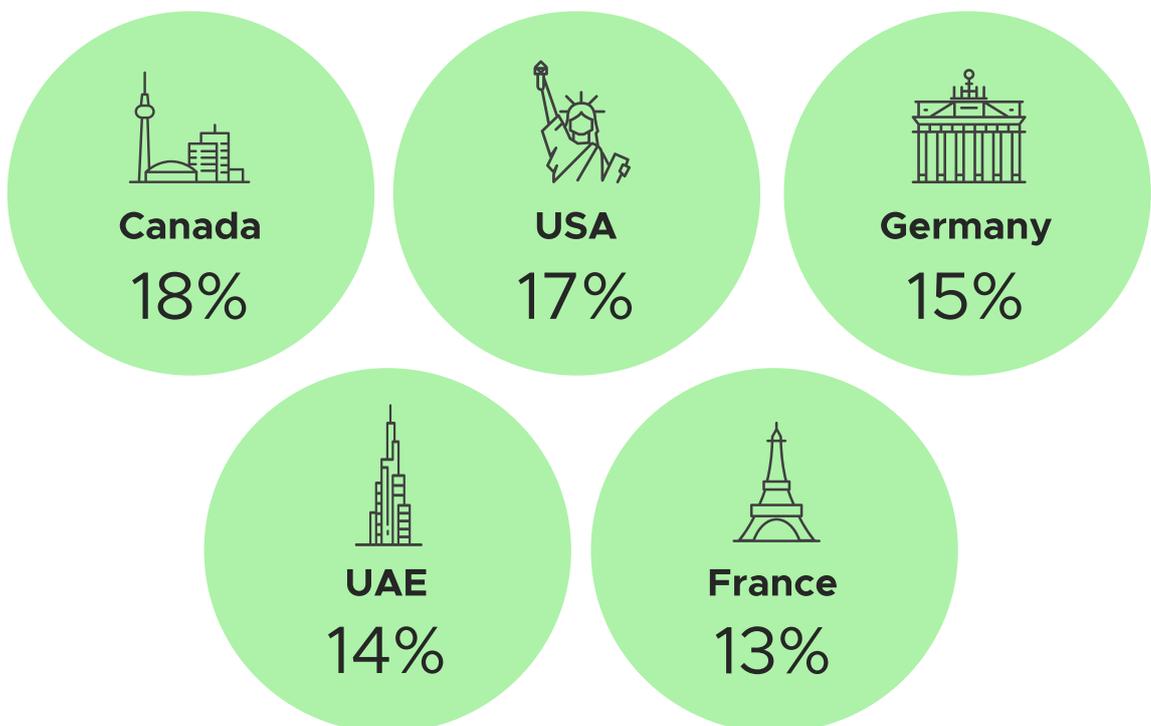
## Young Arabs are most likely to want to emigrate to Canada and the United States

Canada and the US are the preferred destinations of these and other potential emigrants, followed by Germany, the UAE and France. Unsurprisingly, most young Arabs planning or hoping to emigrate said they were motivated by economic reasons.

Education opportunities, corruption in their home countries, and the lack of freedom were other important factors.

### 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')*



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While the number of young Arabs contemplating emigration may have dropped due to the travel restrictions imposed by the pandemic, and the isolationist policies of destination countries, their reasons for wanting to leave remain the same: lack of jobs, poor schooling, and political instability.

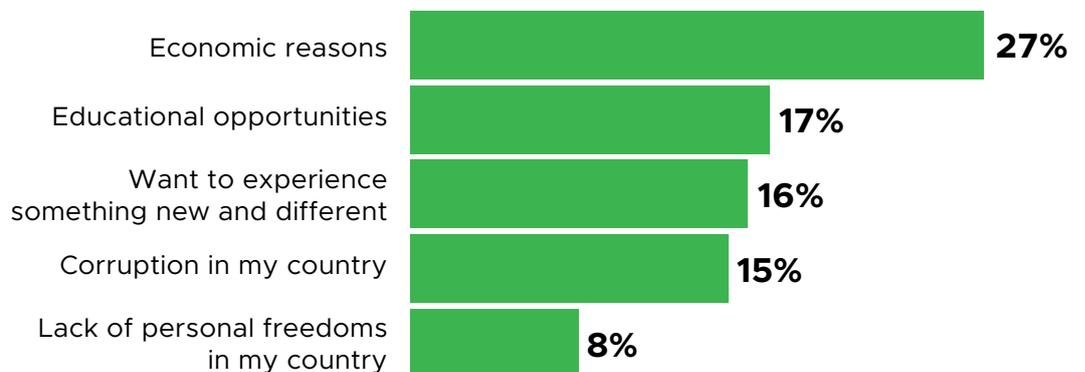
The message of Arab youth to policymakers is clear: remove the obstacles in the way of progress if you intend to keep your best young talent.



*With restrictions in travel and lockdowns, fewer young Arabs are considering emigration this year*

## **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?**



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# Drop in desire to emigrate is a vote of confidence for the region



**Hussein Ibish**

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Hussein Ibish is a Senior Resident Scholar at the Arab Gulf States Institute in Washington (AGSIW). He is a weekly columnist for Bloomberg Opinion and an American Affairs columnist for The National (UAE). 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.

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**T**he latest findings of the annual ASDA'A BCW Arab Youth Survey are instructive as usual, but many also come as a pleasant surprise. Perhaps the most striking of these counter-intuitive findings are Arab youth attitudes towards emigration. The stereotype, particularly in the West, is of a region beset by turmoil and economic malaise, with Arab youth clamouring to leave their countries. But the survey points in a very different direction.

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**Predictably the search for economic opportunities remains the biggest driver of youth emigration. Over a fourth, 27%, of Arab youth say economic concerns would be the main reason they would consider moving to another country.**

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Overall, most Arab youth – almost half of the survey sample at 44%– say they would “never” consider leaving their country. An additional 23% say they have not considered emigration, but conceivably could, and 21% say they are considering emigration, but not actively trying.

And a mere 12% of Arab youth report being in the process of trying to emigrate. That’s a strong vote of confidence for a region typically assumed to be drifting between malaise and disasters.

Because the results reflect a marked decrease in the desire to relocate over 2020 results, the survey report notes a “spike in optimism,” especially in the Levant and North Africa.

Unsurprisingly, youth in some Arab countries are still either considering or trying to leave in sizeable numbers. Sudan, Morocco, Lebanon, Jordan, Syria, Algeria and the Palestinian Territories all report over 40% of potential youth emigrants. That reflects conflict and instability, as well as economic distress, in Lebanon, Syria and Palestine and limited opportunities in others such as Morocco, Algeria and Jordan.

But the results become more interesting as the numbers shrink. Three countries experiencing significant unrest report surprisingly low numbers: 36% for Libya and Yemen, and only 31% for Iraq. After that, the numbers dwindle. The only Gulf Cooperation Council country to reflect a significant percentage of youth seeking relocation is Bahrain at 31% followed by Oman at 13% with just 8% in Saudi Arabia and Kuwait and a mere 3% in the UAE.

The UAE also figures quite highly among the top five preferred destinations for Arab youth seeking relocation, along with Canada, the US, Germany and France in roughly similar levels of desirability. The figure leaps to 47% when Arab youth are asked which country in the world they would like to live in, dwarfing the number two US, which had 19%. Nearly half, 46%, of Arab youth also said they would like their country most to emulate the UAE, with the US again coming in second at 28%.

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## **The US remains highly regarded in other respects, as 51% of young Arabs think it has the strongest influence in the region, placing it at number one, and is rated number two in countries most desirable as a residence and as a country to be emulated. This indicates a strong lingering respect for the US but a deficit of trust in its policies and reliability.**

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Overall, these findings suggest that the UAE has established a strong and durable brand among Arab youth, which suggests that its social model of diversity and tolerance has a good chance of influencing the social and cultural development of other Arab societies over time. The prospects for that model's regional influence growing over time is bolstered by the results showing that more than two-thirds of Arab youth, especially in North Africa, want their religious institutions to reform.

There is a clear preference for religion and even family or clan as a primary source of identity over nationality (only 18%). This desire for religious identification but within an atmosphere of reform may help to explain the huge popularity of the UAE as a potential destination for would-be Arab youth emigrants.

However, predictably the search for economic opportunities remains the biggest driver of youth emigration. Over a fourth, 27%, of Arab youth say economic concerns would be the main reason they would consider moving to another country. This combination of the clear religious identity as a Muslim-majority country with strongly reformist religious institutions and a tolerant, diverse society along with major economic opportunities helps to explain the striking pull of the UAE. Arab youth associate the country most with economic growth and work opportunities (28% each).

The survey findings on gender rights are not encouraging. The percentage believing that men have more rights than women in their societies soared from 25% in 2020 to 40% in 2021. And the percentage believing that men have better jobs and employment opportunities than women jumped 9%, from 35% in 2020 to 44% in 2021. A majority, 79%, of women say they lack job opportunities, including 52% in the GCC. But the sense of economic gender inequality is significantly higher in other Arab regions, suggesting the potential for the emigration of young women to the Gulf as well as the West in search of badly-needed job opportunities.

Among other most striking results are those regarding the role of the US in the region. Opinions on this topic had been steadily declining in recent years, but it's remarkable to see Washington ranked as third in the list of perceived enemies at 41%, exceeded only by Iran and Israel. And the US also scores very low as a perceived ally, far behind Russia, China, Turkey and Britain. It is, perhaps, too early to tell if the new policies of the Joe Biden administration will help to repair some of the damage done to the US reputation under his predecessors, including Donald Trump and, to a lesser extent, Barack Obama, or if the US is stuck with a negative reputation among Arab youth that is by no means commensurate with its actual role, especially compared to rivals such as Russia, China and Turkey.

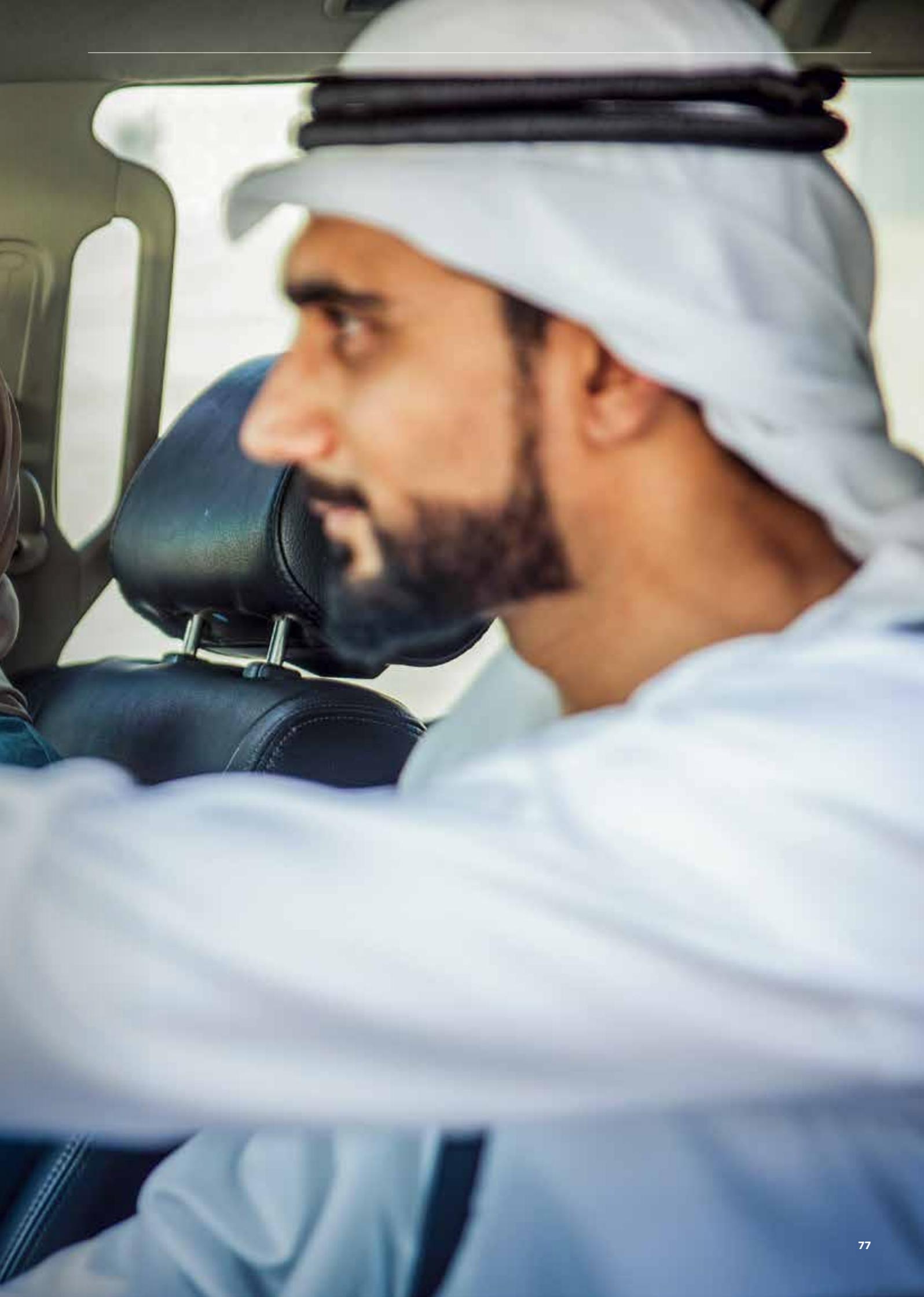
Yet the US remains highly regarded in other respects, as 51% of young Arabs think it has the strongest influence in the region, placing it at number one, and is rated number two in countries most desirable as a residence and as a country to be emulated. This indicates a strong lingering respect for the US but a deficit of trust in its policies and reliability.

Yet even where the US remains highly regarded, it is the UAE which tends to be seen as even more desirable by Arab youth. Combined with the surge of optimism among the youth in the Levant and North Africa, and the desire for greater religious reform and gender equality, the 2021 ASDA'A BCW Arab Youth Survey results point to a brighter future for the region, at least if the Arab youth can realize their dreams and ambitions.



# GENDER RIGHTS

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



A top finding of the 2020 ASDA'A BCW Arab Youth Survey was that a majority of women believed they had the same rights as men. From a high of 64% in 2020, just over half (51%) of young Arab women said they have the same rights as men this year.

Progress on gender equality appears to have slowed, according to the results of this year's research, with 40% of female respondents now saying that 'men have more rights than women' compared to 25% stating so in 2020. Meanwhile, the percentage of young Arab women in MENA who believe they enjoy equality with men has dropped from 64% to 51%.

Global indicators clearly show that Arab countries need to make progress in achieving gender parity. At just 18.4%, female participation in the workforce is far below the global average of 48%. Women in the region also suffer much higher rates of unemployment than women globally, while only 11% of management roles in the Middle East are filled by women, compared with more than a quarter (27.1%) internationally.

Young women in Lebanon appear particularly disadvantaged compared to men, with 44% of respondents to the survey saying they have the same rights as men, down from 60% last year.

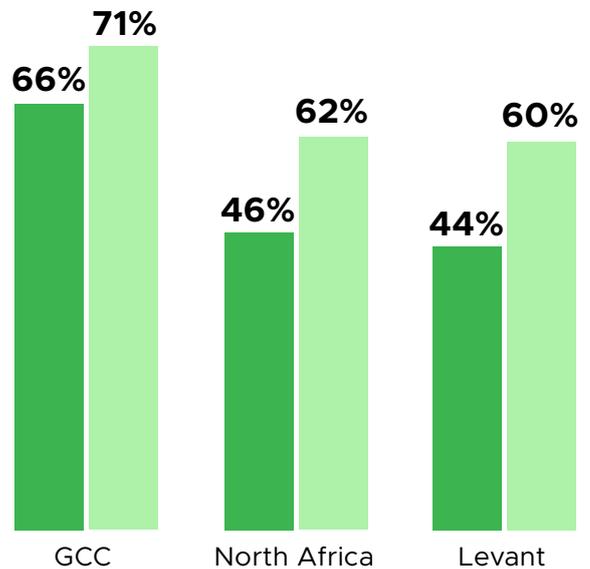
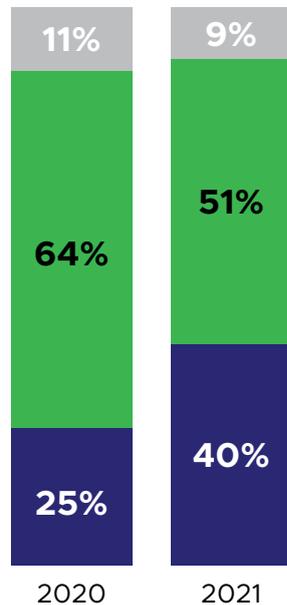
## The number of young Arab women saying they have the same rights as men has fallen across the region over 2020

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

■ 2021 ■ 2020



# 40%

Young Arab women who said 'men have more rights than women'

At just 18.4%, female participation in the workforce is far below the global average of 48%.



The COVID-19 pandemic has had a disproportionately negative impact on young women in the Arab world

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

The 2021 survey reveals that female progress within the workplace has also stalled, with only 46% of young Arab women overall saying they have the same professional opportunities as men, compared to 52% last year. Worryingly, 44% of young females also say that men have better access to professional opportunities these days, up from just over a third (35%) last year.

The COVID-19 pandemic has had a disproportionately negative impact on women, with the UN Economic and Social Commission

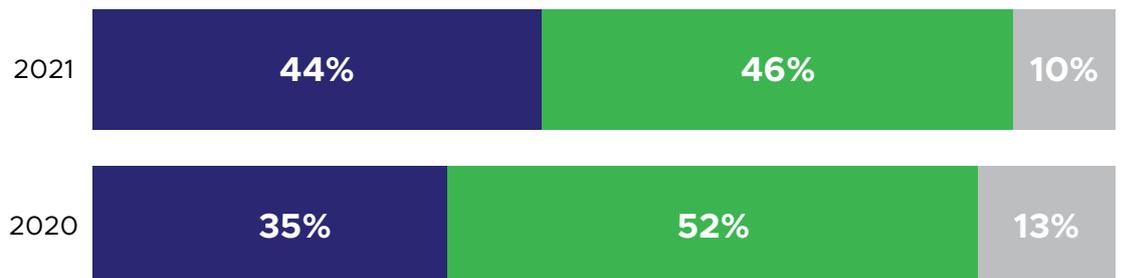
for West Asia (ESCWA) estimating that the pandemic has caused as many as 700,000 female job losses.

Movement restrictions hit countries that exports large amounts of labour in Egypt, Jordan and Lebanon, while casual, low-paid and poorly regulated jobs, many of them performed by women, were often the first to go when companies were forced to reduce budgets at the height of the crisis.

#### 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



Almost eight out of 10 Arab women admit to being concerned about the lack of job opportunities. Women in North Africa are the most anxious about their prospects, however women in the Levant (84%) and the GCC (65%) also express concerns, illustrating the scale of the problem across MENA.

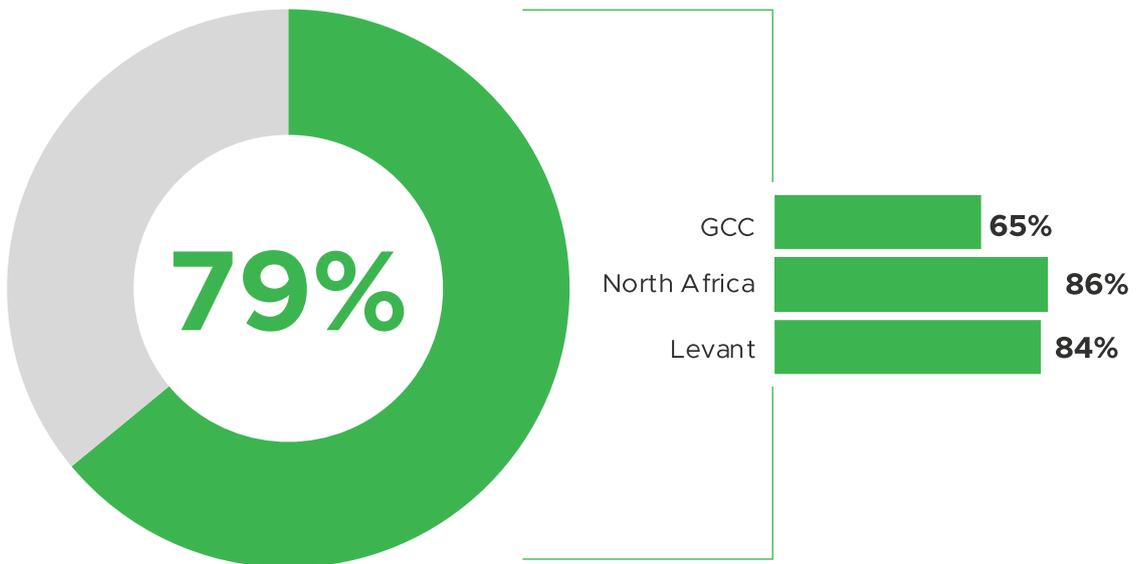
This concern is highlighted by the International Labour Organisation, which states: “The freedom to work – by choice, in conditions of dignity, safety and fairness – is

integral to human welfare. Guaranteeing that women have access to this right is an important end in itself. From an economic perspective, reducing gender gaps in labour force participation could substantially boost global GDP. The regions with the largest gender gaps would see huge growth benefits.”

## 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

“Nearly two in three young Arab women say they have same rights as men their country in the GCC region. This is primarily due to bold decisions by the governments and by erasing a previous faulty mindset that gave an impression of a chaotic society if women were allowed to participate in all walks of life.”

**Khaled Almaeena**, veteran Saudi journalist

(Ref. Page 82)



The appeal to men of women doing paid work has dropped 7% to 63%, and now a third of young Arab men overall (35%) believe women can benefit their family most by staying at home full-time.

### Young Arab women say they will benefit their family most by working

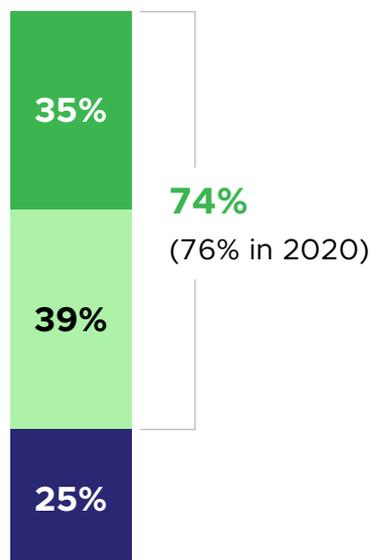
Most Arab youth, both male and female, agree that a woman can benefit her family most by working either part or full-time, although slightly fewer women appreciate the benefits of paid work in this year's survey (74% compared to 76%). However, the appeal to men of women doing paid work has dropped to 63%, and now a third of young Arab men overall (35%) believe women can benefit their family most by staying at home full-time.

These and other insights appear to reinforce a recent Arab Barometer report, which stated that “the lockdown, school closures, and the increased demands of the family and home, which are predominantly women’s responsibilities in MENA, have taken a toll on Arab women – economically and socially.”

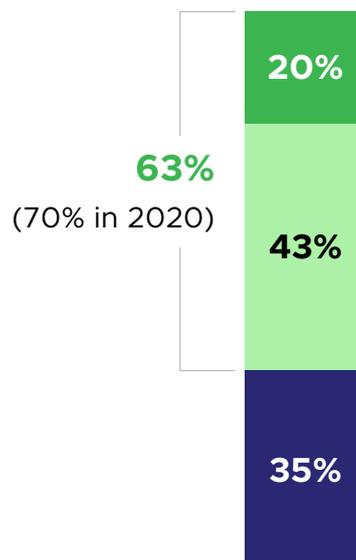
### Which of the following is closer to your opinion? A woman can benefit her family most if she

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

(Among women)



(Among men)



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# Arab women believe Gulf societies should modernise than westernise



**Khaled Almaeena**

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Khaled Almaeena is the Managing Partner of Quartz - Communication Company and Director - Abeer Medical Group. He has held a range of positions in Saudi media for almost 30 years, including as CEO of a PR firm, television news anchor, talk show host and journalist. Highly regarded for his views, Almaeena's columns appear in Gulf News - Dubai, Asharq AlAwsat, Al-Eqtisadiyah, Arab News, Times of Oman, Asian Age, Al Arabia, Makkah and the China Post and the Saudi Gazette. In 1982, Almaeena became the Editor-in-Chief of Arab News. He stepped down in 1993 to head the Saudi Public Relations Company a position he held for five years. He returned to the top editor's post of Arab News in 1998 and continued until October 2011. In April 2012, he joined as the Editor-in-Chief of Saudi Gazette and continued in the position until the end of April 2014. He was awarded a Doctorate in Humanities from Mindanao University in the Philippines in 2009. He is a visiting non-resident scholar at the University of Central Florida.

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It has always given me satisfaction to read the findings of the ASDA'A BCW Arab Youth Survey. In a region where accurate information and data are hard to come by, the findings, done in a scientific manner, offers a refreshing insight into the mindset of the young Arabs, who live in a society that is part-tribal and part-patriarchal resulting in a top-down flow of information, ideas and knowledge.

However, things are changing. The overwhelming majority of Arabs are young, better educated and aspire to be participants in a world which is fast changing by the day and where the slow would be gobbled up by the fast.

The challenges that loom on the horizon can try anyone's soul. And in the Arab region, one has to be a diehard optimist just even to get out of bed in the morning. A bleak outlook encompassing pandemic, economic turbulence, conflicts both within and outside the Arab region requires steady hands and brave minds. But minds cannot function in a vacuum.

They need a conducive societal atmosphere that will energise the young to plan their own vision and follow it to fulfillment by prioritising their needs and striving to achieve their goals. However the optimists among the youth are apprehensive. They want their voices to be heard because they are stakeholders and not mere bystanders, they will be the future players in the region.

And while in the past all major reports and media analysis when writing about youth focus on men, there is now a strong women component in the data analysis. No more plans can be made and goals set, without taking into consideration the role of women.

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**As a Saudi lady told me years ago "a society that excludes half of its population will wither and die." And she is right. The gender issue without going into a hotly contested debate is now a thing of the past. It has not been totally erased. However, bold decisions in the some of the Arab countries have put to the rest this debate.**

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As a Saudi lady told me years ago "a society that excludes half of its population will wither and die." And she is right. The gender issue, without going into a hotly contested debate, is now a thing of the past. It has not been totally erased. However, bold decisions in some of the Arab countries have put to the rest this debate.

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**All the changes in the past few years have not made a dent in women's identity. On the contrary women believe that Gulf societies 'should modernise rather than westernise.' Religion and identity are key elements in the thought process of the youth. And in fact the inclusion and participation of women in the past three years in Saudi Arabia has not caused any social imbalance. In fact males are quick to provide success stories of their women family members.**

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And while the majority of men want participation of women, they believe it should be within the confines of our ideology and culture. After all, the Holy Prophet of Islam (PBUH) worked for a lady Sitti Khadija.

However what arrested the development of women in both the public and private sector were cultural concerns and fears.

Now those obstacles that gave rest to these fears have or are being removed through legislation, new rules and the State's determination to get on with it. And this is exactly what happened in Saudi Arabia in the past couple of years. Doors have been opened and access to opportunities granted. This has created a buzz in the society.

#### **Modernise, rather than westernise**

Women are now also bread earners and benefitting their families. While some women point to a worsening of gender equality across the region following the pandemic many others dispute this. They point out the rising statistics in the cottage industry, home catering, on-line teaching and even home health care.

I myself am a witness to the rise in such services. Those outside the region who were 'worried about the plight of Arab women' need not be anymore. Nearly two in three young Arab women say they have the same rights as men in the GCC. This is primarily due to bold decisions by the governments in the region and by erasing a previously faulty mindset that gave an impression of a chaotic society if women were allowed to participate in all walks of life. Fear of losing the Islamic identity was the 'Sword of Damocles' held over the society's head.

All the changes in the past few years have not made a dent in women's identity. On the contrary women believe that Gulf societies 'should modernise rather than westernise.'

Religion and identity are key elements in the thought process of the youth. And in fact the inclusion and participation of women in the past three years in Saudi Arabia has not caused any social imbalance. In fact males are quick to provide success stories of their women family members.

In essence the myths of fear and uncertainty have been finally laid to rest. The nature of the modern professional character of the Arab woman has changed due to the change in male attitude brought about by resolute government enforcement that has created a framework helping women achieve acceptance within Arab society.

Untapped potential of Arab women can propel the region to greater development and in turn offer economic rewards. In the light of all this the gender issue fades in the background and people at the corporate, academic and government level are evaluated solely on the basis of their performance and not on gender. Women are now viewed as professionals and not genders. Their inclusion is no more cosmetic for purposes.

After all who was it who said,  
"The best man for the job is a woman".

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# 10

## MEDIA CONSUMPTION

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



Social media has been a force of change in the Arab world, especially in the past decade. Influencing political movements and youth-led protests, social networks led to the rise of a group of ‘netizens’ – young women and men who steered online conversation to rally people. It served as the voice for millions of young Arabs to express their pent-up frustrations over the lack of jobs and political freedoms in their home countries.

As Robin Wright writes in her influential book, ‘Rage and Rebellion Across the Islamic World,’ Mohamed Bouazizi’s death was in fact the trigger for many of the youth movements that had already established themselves on social media, adding that one of the most iconic images of the protests in Cairo’s Tahrir Square was a cardboard placard exclaiming, ‘Thank you, Facebook’.

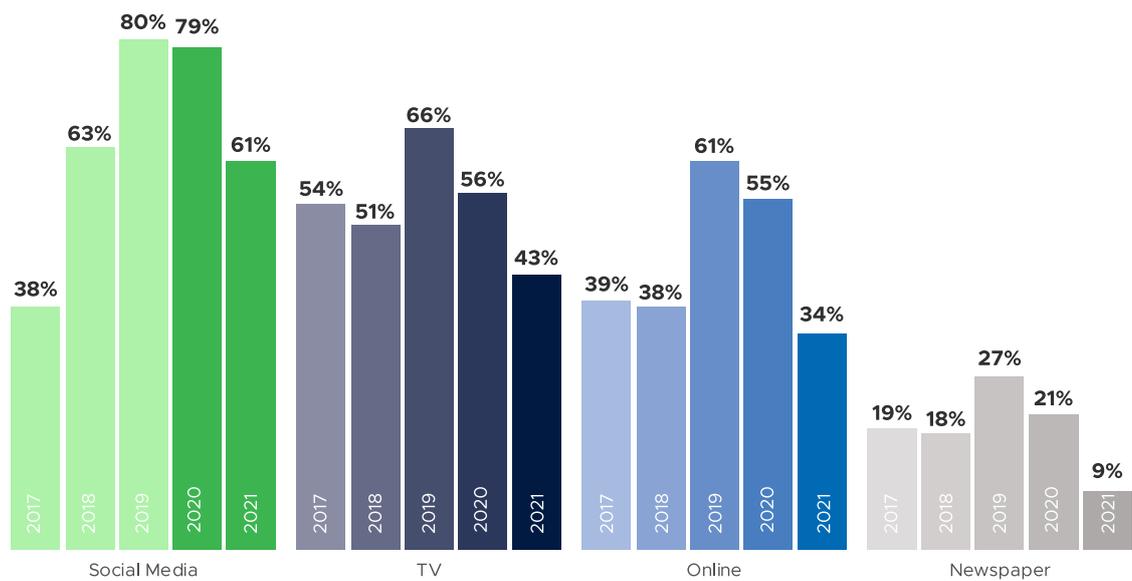
Unsurprisingly, therefore, social media has evolved as Arab youth’s primary news source over the past decade, aided by expanding telecom networks, increased data provisions and greater smart-phone penetration.

Nearly two-thirds (61%) of respondents to the 2021 survey said they got their news from social media, followed by TV (43%) and online news portals (34%). Printed newspapers were the choice of only 9% of young Arabs, down from 27% only two years ago.

The popularity of social media has shot up since 2017, when it was the news choice of 38% of Arab youth.

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

Where do you get your news?



Social media has evolved as Arab youth’s primary news source over the past decade, aided by expanding telecom networks, increased data provisions and greater smart-phone penetration.

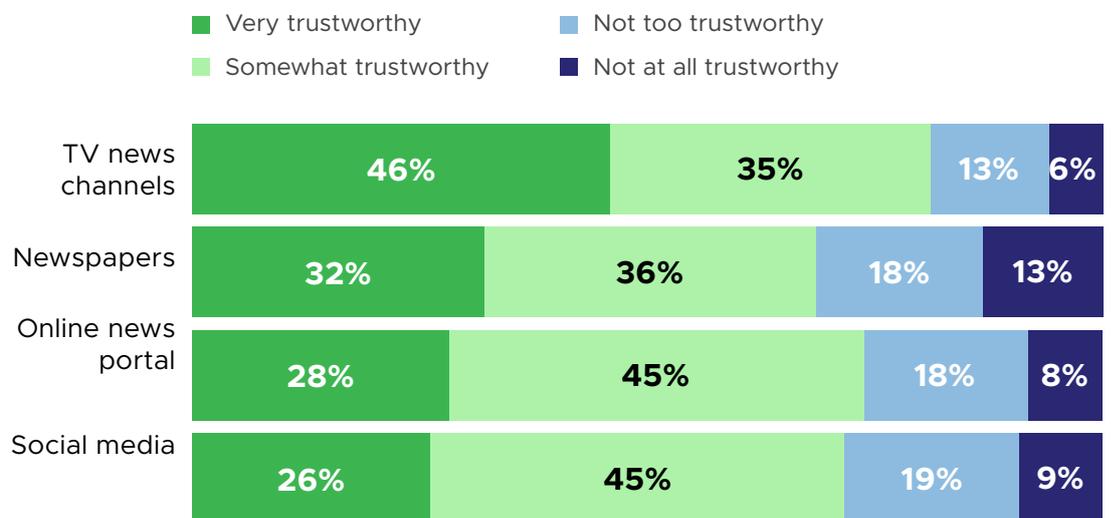


## Social media is less trusted than TV, newspapers, and online news portals

The popularity of social media, however, does not necessarily equate to trust. According to the survey, Arab youth trust social media outlets less than TV, newspapers, and online news portals. While nearly half of young Arabs (46%) describe TV channels as 'very trustworthy' and a third (32%) say the same about newspapers, barely a quarter (26%) find social media channels very trustworthy.

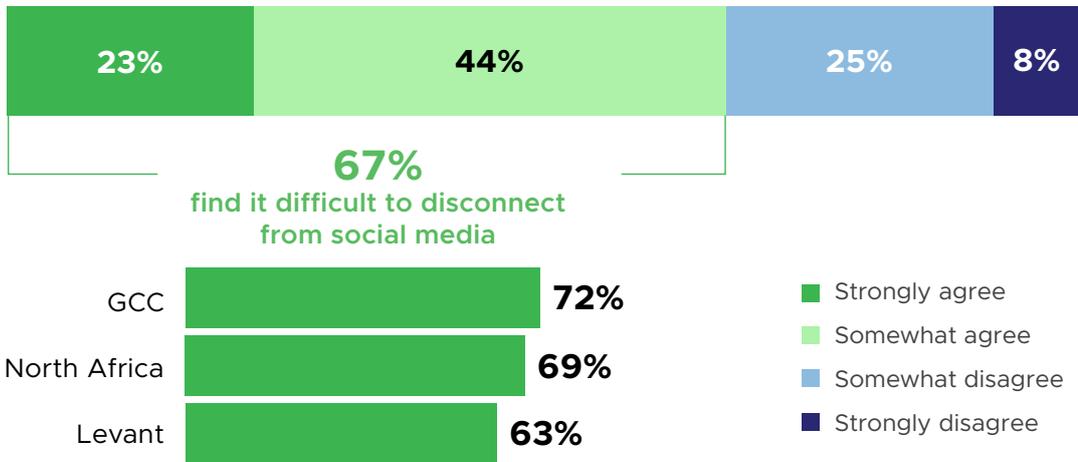
This could be attributed to news fatigue at the height of the COVID-19 pandemic, a possible backlash against social media and their perceived role in spreading fake news as well as changing lifestyles and workplace behaviour with the advent of remote working and schooling.

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



## Two third 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?



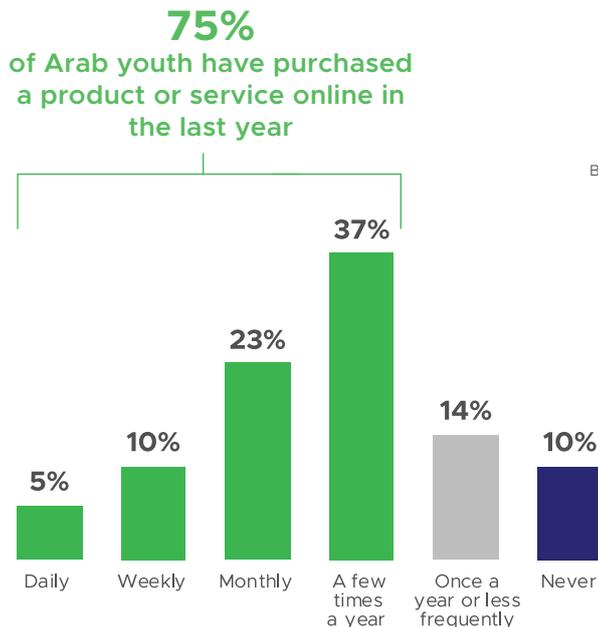
Increasing social media penetration also poses mental health and lifestyle challenges, with more than two-thirds (67%) of Arab youth saying they struggle to disconnect from social media. The problem appears greatest in the GCC countries, where 72% of interviewees say they find it difficult to disconnect.

This is hardly surprising when the choice of online products and services continues

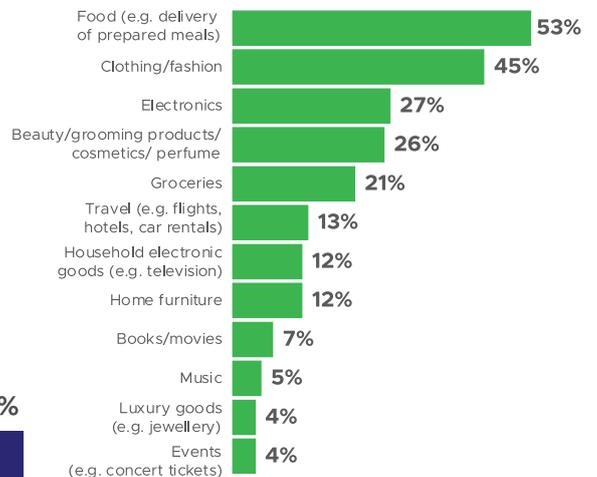
to multiply, and with remote working and studying now the norm. Three-quarters of Arab youth say they have completed an online purchase over the past 12 months. Food is the most popular item, identified by 53% of respondents, followed by beauty products (26%) and groceries (21%). Music, books/movies and luxury goods are among the least popular online purchases.

## 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?



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





# Social, economic and social media indicators 2021

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)
<b>GCC</b>							
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%)
<b>Sub-total</b>	<b>55.77</b>	<b>3,455.16</b>			<b>52.57</b>	<b>43.13</b>	<b>74.39</b>
<b>Levant and Other Middle East</b>							
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%)
<b>Sub-total</b>	<b>109.64</b>	<b>1,076.46</b>			<b>62.73</b>	<b>42.1</b>	<b>90.23</b>
<b>North Africa</b>							
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%)
<b>Sub-total</b>	<b>245.57</b>	<b>3,005.38</b>			<b>116.59</b>	<b>95.7</b>	<b>247.53</b>
<b>Total for all 17 states covered</b>	<b>410.98</b>	<b>7,537</b>			<b>231.89</b>	<b>180.93</b>	<b>412.15</b>

## 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](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/](https://www.theglobaleconomy.com/Yemen/oil_revenue/)); Algeria - OPEC ([https://www.opec.org/opec\\_web/en/about\\_us/146.htm](https://www.opec.org/opec_web/en/about_us/146.htm)); Libya - OPEC ([https://www.opec.org/opec\\_web/en/about\\_us/166.htm](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>)

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## About us



ASDA'A was founded in 2000 as an independent agency by Sunil John, who leads the agency in its 21st year. In 2008, WPP (NYSE: WPP) acquired a majority stake in the firm and ASDA'A became a part of BCW (Burson Cohn & Wolfe), one of the world's top three communications firms. The agency employs more than 160 professionals across eight wholly-owned offices. The company has an additional nine affiliates covering 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](http://www.asdaa-bcw.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.

[www.proof-communications.com](http://www.proof-communications.com)



GCI Health is a global integrated healthcare communications agency 'Inspired by People' within the BCW Group. We share our clients' desire to improve the health of all people around the world and work tirelessly to contribute to their ambitious goals. Our approach to communications is rooted in looking at all stakeholders – patients, caregivers, healthcare providers, policy makers, reporters and payers – as people with distinct perspectives that shape how they think about health.

[www.gcihealth.com](http://www.gcihealth.com)



PSB Insights 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.

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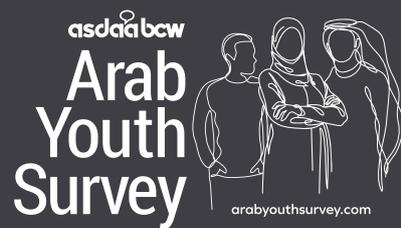
BCW is the global communications agency built to move people. BCW partners with clients in the B2B, consumer, corporate, crisis management, healthcare, public affairs, purpose and technology sectors to set strategic direction for all communications and create powerful and unexpected ideas that earn attention. Through an 'earned-plus' offer – earned media plus paid media, creative technology, data, AI and an expanding suite of innovative capabilities – BCW moves people with power and precision to move its clients forward. BCW is a part of WPP (NYSE: WPP), a creative transformation company.

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WPP is a creative transformation company. We use the power of creativity to build better futures for our people, planet, clients and communities.

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