

# CHARTING A NEW COURSE

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14<sup>th</sup> Annual Edition 2022

# CHARTING A NEW COURSE

A White Paper on the findings of the 14th annual  
ASDA'A BCW Arab Youth Survey 2022

Published in 2022 by ASDA'A BCW

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# **THE ASDA'A BCW ARAB YOUTH SURVEY 2022 IS DEDICATED TO THE ARAB WORLD'S OVER 200 MILLION YOUTH**

**Special thanks to:**

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

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## Commentaries



### **Decoding the Arab world's unrelenting battle of ideas and ideals**

**Khaled Almaena**

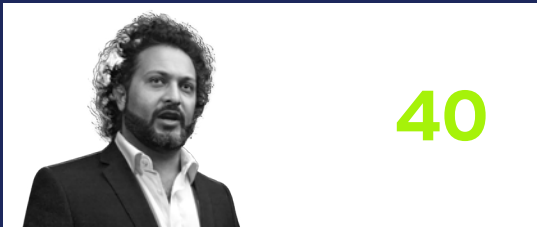
*Veteran Saudi editor, commentator and the former editor-in-chief of Arab News and Saudi Gazette*



### **Deeper reforms herald opportunities for Arab youth**

**Dr Jihad Azour**

*Director of the International Monetary Fund's Middle East and Central Asia Department, Washington, DC*



### **In a changing world, young Arabs face an uncertain future**

**Faisal Al Yafai**

*Journalist and partner at Hildebrand Nord, United Kingdom*



### **The UAE and the Arab world's pragmatic, entrepreneurial generation**

**Afshin Molavi**

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



### **Embrace transparency to build trust in social media**

**Iain Akerman**

*Journalist and editor based between Dubai and Beirut*



### **Emigration of youth presents a 'red flag' to MENA governments**

**Chaker Khazaal**

*Award-winning Palestinian-Canadian author, reporter, public speaker, and Chairman of OBCIDO Inc., a New York-based firm*



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## Introduction

# The 'Arab Spring generation' charts a new course

Sunil John is the President – Middle East and North Africa (MENA) of BCW, 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 OnePoint5, a specialist ESG advisory, and Proof Communications, a specialist digital and design company. Both are wholly owned subsidiaries of ASDA'A BCW.



**Sunil John**

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

**B**arack Obama marked his historic 2008 election victory with the now famous words: "At this defining moment, change has come to America."

Fourteen years later, the same could be said of the Arab world. An era of unprecedented change, dominated by conflicts spawned out of the Arab Spring of 2011, appears to be drawing to a close. In Iraq, Yemen, Libya, Sudan and even Syria, a decade of violence is either ending or dialling down. The Abraham Accords have normalised relations between traditional friends and foes. The US has pulled out of Afghanistan and Iraq, and the Daesh needle has been blunted.

Russia and Ukraine now take the global spotlight when it comes to the battlefield, but, with the exception of the Palestinian Territories, the Arab world is on the cusp of a new wave of tolerance and hope.

From the first ever Arab spacecraft to orbit Mars, to the first ever meeting between a Catholic Pope and a Grand Ayatollah, and leading Gulf nations committing to net zero targets, historians may well regard the past 12 months as the most pivotal in the story of this region.

But exactly which way will 200 million young Arabs pivot? Over half the population of the Middle East and North Africa is under the age of 25, and likely to be the most susceptible to technological change, urbanisation, globalisation and migration.

The 2022 ASDA'A BCW Arab Youth Survey provides a fascinating insight into the hopes and dreams of Arab youth. And the results paint a conclusive picture that the region is at a crossroads.

The need to hang on to traditional values is being challenged by a modern outlook. Major legal reforms are welcomed, yet there is a culture that favours continuity. Stability is sought, but democracy is desired. Religion underpins the region, but nationalism is on the rise.

The lure of the public sector is waning against the spectrum of budding entrepreneurs. When it comes to politics, the default position of looking to the West in times of crisis is being eroded by new allegiances to China, Russia and Turkey.

And young Arabs appear more torn than ever between seeking to start a new life abroad and an unwavering faith in their leaders to resolve the challenges they face.

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The 2022 survey shows that ultimately, as regional conflicts subside, another one is brewing: the battle between optimism and pessimism. This, as Obama would say, is the "defining moment."

This year's survey has been reshaped to reflect the changing times we live in, focusing on the five key subjects that affect and reflect the thinking of young Arabs: their identity, livelihood, politics, lifestyle and aspirations. In each, we delve deep into the results, drawing out both the conclusions and contradictions that define this moment in time. Yes, we are at a crossroads, but in which direction are the youth heading?

The first and clearest of these junctures is about personal identity – what really defines young Arabs today? At first sight, the survey suggests no significant change: huge numbers are concerned about the loss of traditional values, they see religion as the cornerstone of

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## More than a decade after the Arab Spring, change is underway again. This time it isn't being broadcast live on our television sets, trending on social media, or drawing commentary from global leaders. But it is happening. And it is far more complex than the Arab Spring and as – if not more – significant

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their identity and a majority go as far as wanting to see Sharia Law implemented. Yet the very same youth appear keen for change: equally significant numbers want to see reforms in religious institutions and believe that religion plays too big a role in the region.

The overriding conclusion is that Arab youth are simply torn between holding on to their identity by way of traditional values, while at the same time embracing – and exploring – change.

When it comes to their livelihoods, the region hasn't been spared from spiralling inflation, a cost-of-living crisis, and the economic fallout from the war in Ukraine.

Not surprisingly, they cite rising costs, unemployment and poor educational standards as huge concerns, and urge their governments – especially in North Africa and the Levant – to do more to tackle corruption.

But what is different this year, the survey suggests, is that many young people are losing faith in their leaders' abilities to do the right thing (though primarily this is outside the GCC).

There has been, over just the last three years, a significant fall in the numbers seeking either public or private sector jobs, matched by a jump in the numbers looking to start their own business. These numbers are especially high – well over 50 per cent – in countries like Sudan, Lebanon and Algeria.

Nearly a third (28%) across all regions are looking to work for themselves. If this trend continues, it could prove to be the most significant shift in Arab youth culture, with implications for generations to come.

But perhaps the most intriguing results – which again tie into the pattern of being at a turning point – are reflected in the political mindsets of young Arabs. The influence of the US on the region, both in terms of military support and trade, has never been stronger. But the youth are no longer looking westwards.

Nearly three-fourths (73%) want to see the US disengage from the region. China, Turkey and Russia are now seen as the region's strongest allies, to the extent that nearly twice as many young Arabs blame the US and NATO for Russia's invasion of Ukraine as those who accuse Russia.

This suggests, especially when the data is viewed over several years, that dependency on the US is waning and a new triarch featuring China, Turkey and Russia is emerging.

But it is worth noting that the shift towards online spending – with ecommerce now a US\$9 trillion market – has a long way to go. While the number of young Arabs who shop online has doubled in five years, less than half shop online monthly, and those that do mostly prefer paying in cash. The opportunity and potential for big brands is there for the taking.

The final section of the 2022 survey looked at their aspirations, which again brings us back to the crossroads young Arabs find themselves at today. It is here that we see the ever-growing battle between optimism and pessimism.

Yes, young Arabs are by nature – and by the numbers – optimistic. They are convinced that their best days lie ahead and that they will live a better life than their parents. But when it comes to the economy, less than half now feel their country is moving in the right direction.

Which leads us to the fact that more than one in five of all young Arabs surveyed are now actively looking to emigrate. This figure comes with a huge regional caveat, with the numbers in the GCC almost negligible.

But for much of the rest of the Arab world, the tide is turning. More Arab youth than ever are convinced that their challenges cannot be overcome. As such, leaving the region for good is now on the table.

Indeed, the 2022 survey shows us that many issues are on the table. More than a decade after the Arab Spring, change is underway again. This time it isn't being broadcast live on our television sets, trending on social media, or drawing commentary from global leaders. But it is happening. And it is far more complex than the Arab Spring and as – if not more – significant.

Our survey sheds light on how young Arabs feel about themselves, who they really are, what they aspire to be, who they admire, who they see as friends and foes, and whether they even want to still be in the Arab world a decade from now. They have reached the point of decision, and arguably the point of no return.

They are charting a new course, one which will have seismic ramifications for decades to come.

## **14th annual ASDA'A BCW Arab Youth Survey 2022**

The annual ASDA'A BCW Arab Youth Survey, launched in 2008, presents evidence-based insights on the hopes, attitudes and aspirations of the Arab world's largest demographic, its over 200 million youth. The findings inform governments, the private sector, multilateral institutions and academics on policymaking and business strategy.

This year's findings examine the hopes, fears and aspirations of the so-called Arab Spring generation, the cohort of Arab men and women who entered adulthood after the epochal events of the early 2010s.

This year, the findings are presented under six distinct themes: My Identity, My Livelihood, My Politics, My Global Citizenship, My Lifestyle, and My Aspirations.

**3,400**  
face-to-face interviews across  
50 cities in 17 Arab states

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Covering only country  
nationals aged between  
**18-24 years**

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Sample split  
**50:50**  
**male/female**

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The survey was conducted from  
**May 13 to**  
**June 16, 2022**

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### **Field survey covering 3 regions**

#### **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

Professional interviewers of IDS Research & Consultancy conducted 3,400 face-to-face interviews from May 13 to June 16, 2022. The interviews were completed in Arabic and English.

Since our inception, our survey has covered young people in the three key regions that comprise the Arab world - the Gulf Cooperation Council states, Levant and North Africa. This helps present the diversity of the Arab world as well as the nuances in the beliefs and outlook of young Arabs around the region.

In the GCC, we covered Bahrain, Kuwait, Oman, Saudi Arabia and the UAE. Across Levant, we covered Iraq, Jordan, Lebanon, the Palestinian Territories and Syria as well as Yemen. In North Africa, our interviewers met young Arab women and men in Algeria, Egypt, Libya, Morocco, Sudan and Tunisia.

The geographic location of respondents was considered when developing the fieldwork methodology, with, for

example, 40 per cent of UAE respondents in Abu Dhabi, 40 per cent in Dubai and 20 per cent in Sharjah.

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

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

The countries and gender were weighted equally following international polling criteria, with a margin of error of plus or minus 1.65 per cent.

UAE	Oman	Bahrain	Saudi Arabia	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 (25%)
Sharjah (20%)			Riyadh (40%)	Al Hawalli (30%)	Alexandria (25%)	Irbid (25%)	Beirut (50%)
Abu Dhabi (40%)	Batinah (50%)		Dammam (20%)	Al Ahmadi (20%)	Mansoura (25%)	Zarqa (25%)	Tripoli (25%)
			Al Farwaniya (30%)				

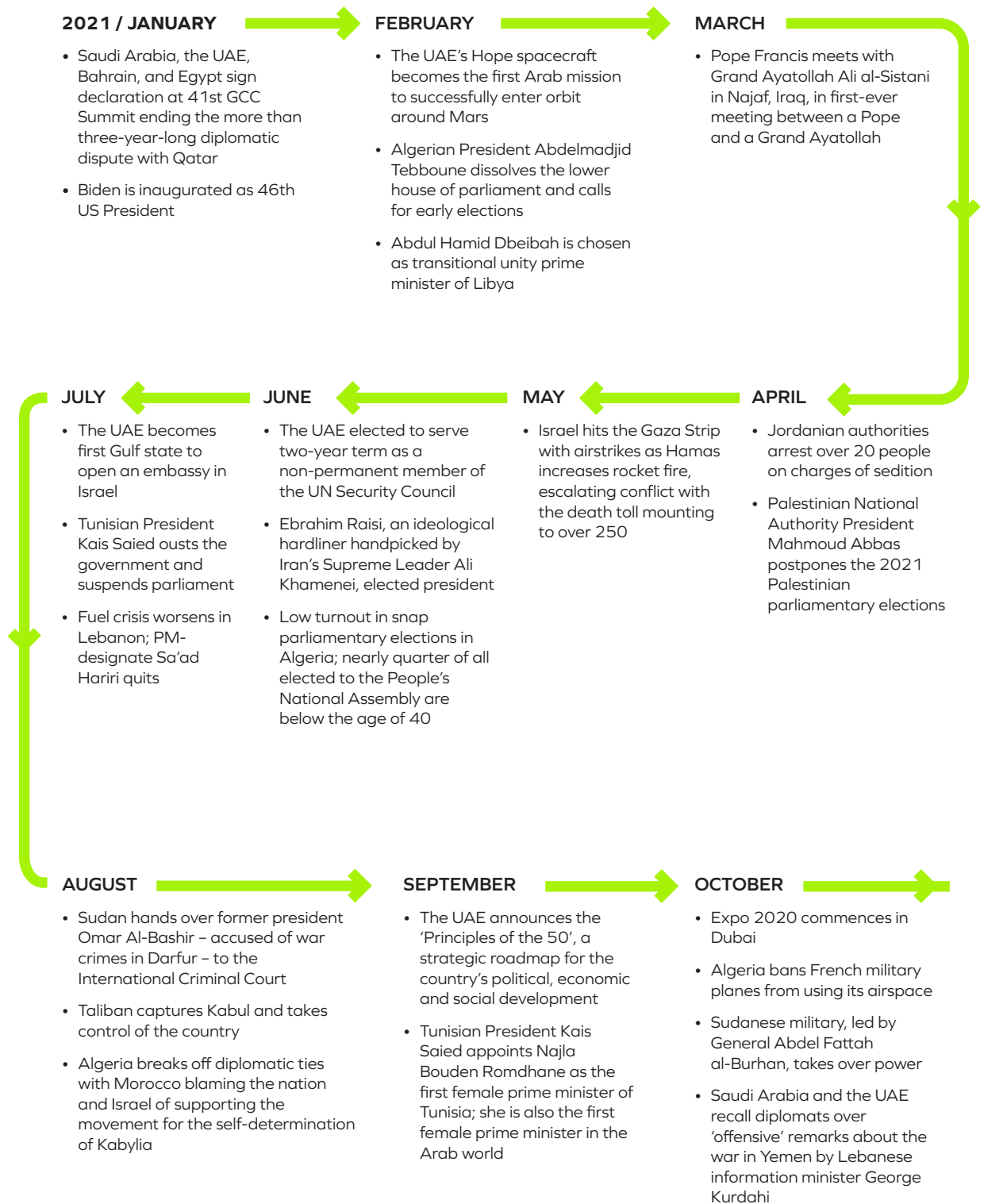
Iraq	Tunisia	Libya	Algeria	Morocco	Yemen	Palestinian Territories	Syria	Sudan
<b>N=200 per country</b>								
Baghdad (50%)	Tunis (50%)	Tripoli (50%)	Algiers (50%)	Casablanca (25%)	Sanaa (50%)	Gaza (50%)	Damascus (50%)	Khartoum (50%)
Irbil (25%)	Sfax (25%)	Misrata (25%)	Oran (25%)	Fes (25%)	Al Hudaydah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

*Countries and gender were weighted equally.*



## Timeline

### Key events of 2021 and January to June 2022



## NOVEMBER

- The UAE wins bid to host UNFCCC's COP28 in 2023; announces Net Zero by 2050 Strategic Initiative; Saudi Arabia and Bahrain announce goal to be net zero by 2060
- Nationwide protests in Sudan calling for transfer of power back to civilian leaders; Abdalla Hamdok is reinstated as Prime Minister
- The UK outlaws Hamas, which serves as the ruling party of the Gaza Strip

## DECEMBER

- Houthis launch a missile strike on Saudi Arabian city of Jizan, killing two people and injuring seven more

## 2022 / JANUARY

- Abdalla Hamdok resigns as Prime Minister of Sudan in response to security forces killing three anti-coup protestors
- Daesh militants attack prison in Syria freeing prisoners and leading to clashes that kill 67
- Three killed in drone attack by Houthi rebels in Abu Dhabi; UAE intercepts two ballistic missiles over the capital city; Saudi airstrike on a prison in Yemen kills at least 100

## APRIL

- President of Yemen Abdrabbuh Mansur Hadi resigns from office; transfers powers to eight-member Presidential Leadership Council, chaired by Rashad al-Alimi
- Global food prices increase to their highest level since the UN's Food Price Index began in 1990 following Russia-Ukraine war
- At least 168 people killed and 98 others injured during three-day clash between Arabs and non-Arabs in West Darfur, Sudan

## MARCH

- The US and the UK announce ban on Russian oil; oil prices surge to US\$139.13 per barrel, the highest value since July 2008
- Expo 2020 closes in Dubai after a six-month run; welcomes 24 million visitations
- Saudi Crown Prince HRH Mohammed bin Salman says his country will continue talks with Iran to reach an agreement
- Houthi rebels launch 16 missile and drone attacks on Saudi Arabian cities
- Tunisian President Kais Saied orders the Assembly of the Representatives of the People to be dissolved

## FEBRUARY

- Daesh leader Abu Ibrahim al-Hashimi al-Qurashi killed in raid by US forces in Syria
- Russia begins full-scale invasion of Ukraine
- Tunisia Supreme Judicial Council dissolved by President Kais Saied
- Airstrike by Houthi rebels on Abha International Airport in the Saudi Arabian city of Abha injures 12
- UN Security Council unanimously passes resolution declaring Iraq is no longer required to pay out to victims of its 1990 invasion of Kuwait
- Brent Crude oil reaches its highest price since its 2014 peak, at US\$99 per barrel

## MAY

- HH Mohamed bin Zayed Al Nahyan elected as third president of the UAE following the passing of Sheikh Khalifa bin Zayed
- Al Jazeera journalist Shireen Abu Akleh is killed while covering a raid in Jenin; Israeli riot police beat mourners at her funeral
- Iraqi parliament prohibits all attempts at normalising relations with Israel
- **Fieldwork for 14th annual ASDA'A BCW Arab Youth Survey commences**

## JUNE

- Tunisian judiciary announces strike in response to President Kais Saied dismissing 57 judges
- **Fieldwork for 14th annual ASDA'A BCW Arab Youth Survey concludes**

## JULY

- US President Biden marks historic visit to Saudi Arabia
- Daesh leader Maher al-Agal killed in US airstrike in Syria
- Algeria indicates support for Syria to return to the Arab League after a decade-long suspension

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# TOP FINDINGS



1

## MY IDENTITY

Religion is central to the personal identity of young Arabs; yet they want religious institutions to reform



2

## MY LIVELIHOOD

Young Arabs are concerned about the quality of education, lack of jobs and rising personal debt, and many are turning to entrepreneurship, rather than depending on government or private sector jobs



3

## MY POLITICS

The Arab Spring generation says promoting stability is more important than democracy



4

## MY GLOBAL CITIZENSHIP

For the 11th consecutive year, most young Arabs say the UAE is the country they would most like to live in and their own nations to emulate; there has also been a dynamic shift in outlook on foreign affairs, with China emerging as a top ally



5

## MY LIFESTYLE

Young Arabs spend more time on social media and struggle to disconnect; online shopping is booming



6

## MY ASPIRATIONS

The majority of Arab youth are optimistic of better days but many fear their national economies are headed in the wrong direction, with nearly half considering emigration



# 1

## MY IDENTITY

Religion is central to the personal identity of young Arabs; yet they want religious institutions to reform



The importance of religion and language in the Arab world cannot be overestimated. Over 15 per cent of the world's 1.8 billion Muslims are Arabs, and the 1,500-year-old Arabic language is spoken by nearly 400 million people around the world.

But how does this impact the identity of young Arabs during these times of monumental change? What truly defines a young Arab today? What values matter to them?

When it comes to personal identity, the 2022 ASDA'A BCW Arab Youth Survey throws up as many questions as answers. There are vast regional splits and contradictions, that can only be explained by the vastly differing economies, lifestyles and cultures across the region.

Saudi Arabia is aiming to turn itself into an international business hub, with over 7,000 foreign firms being touted to set up in the Kingdom. The UAE's Emirati population is just 11 per cent.

While unemployment is rife in some countries, reform has been the buzzword in 2022, and the influence of foreigners and foreign cultures within the region is rising rapidly. This is clearly impacting the mindset of young Arabs today.

The 2022 survey shows that 41 per cent believe religion is still the cornerstone of their personal identity, far greater than their national identity at just 18 per cent.

The Arabic language is deemed the most important factor by just 5 per cent.

This desire to preserve traditions is reinforced by other findings, including 70 per cent being concerned about the loss of traditional values, a majority keen to preserve their cultural identity over creating a more liberal society, and overall, 56 per cent going as far as wishing to see their legal structures based on Sharia Law.

But, as explained earlier, young Arabs are at a crossroads: 73 per cent of the very same Arab youth believe religion plays too big a role in the region, while 77 per cent want to see reform in religious institutions.

Put simply, young Arabs want to hold on to their identity while at the same time embrace change. Much of the variance is by different regions, with more conflict affected areas generally less inclined to follow traditional values, instead seeking a more liberal approach.

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Over 15 per cent of the world's

**1.8 billion**

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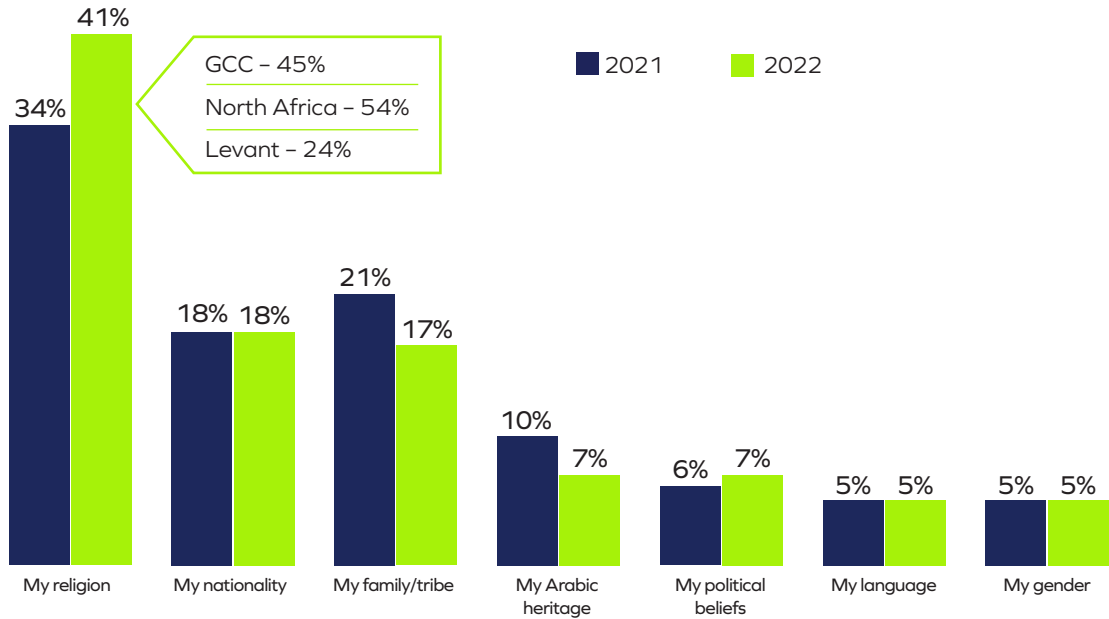




## Young Arabs view their religion as most important to their personal identity

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

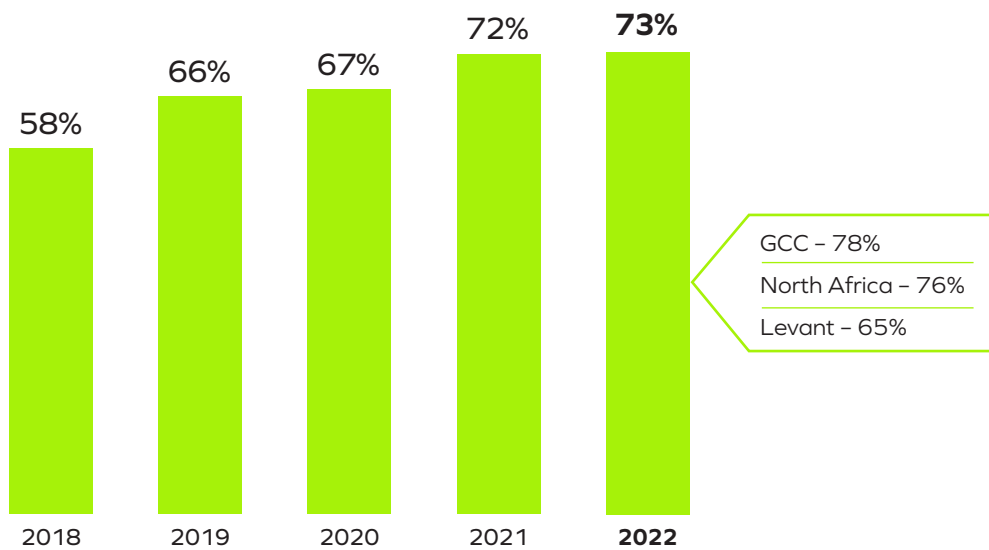
(Showing percentage, among all)



## There is increasing agreement that religion plays too big a role in the Middle East

How strongly do you agree or disagree that religion plays too big a role in the Middle East?

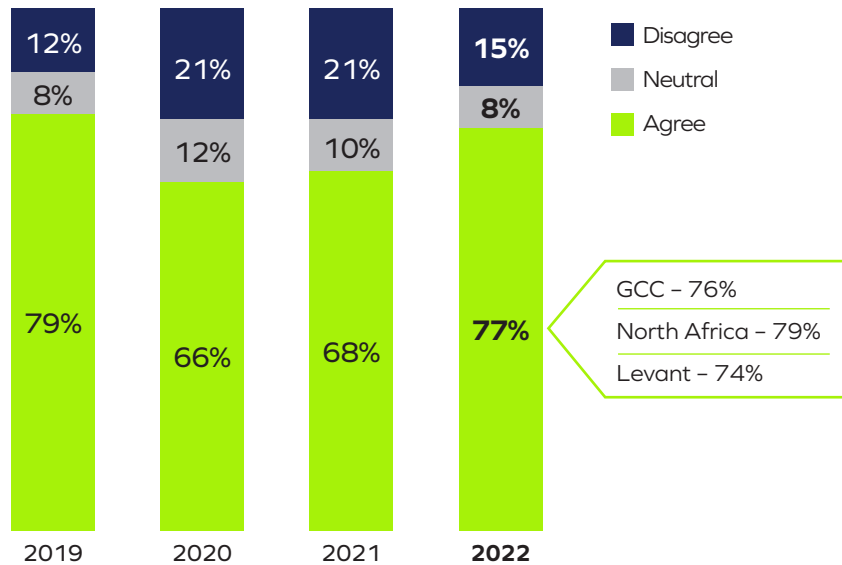
(Showing percentage, among all, agreeing religion plays too big a role)



## Over three-quarters of young people say the Arab world needs to reform its religious institutions

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

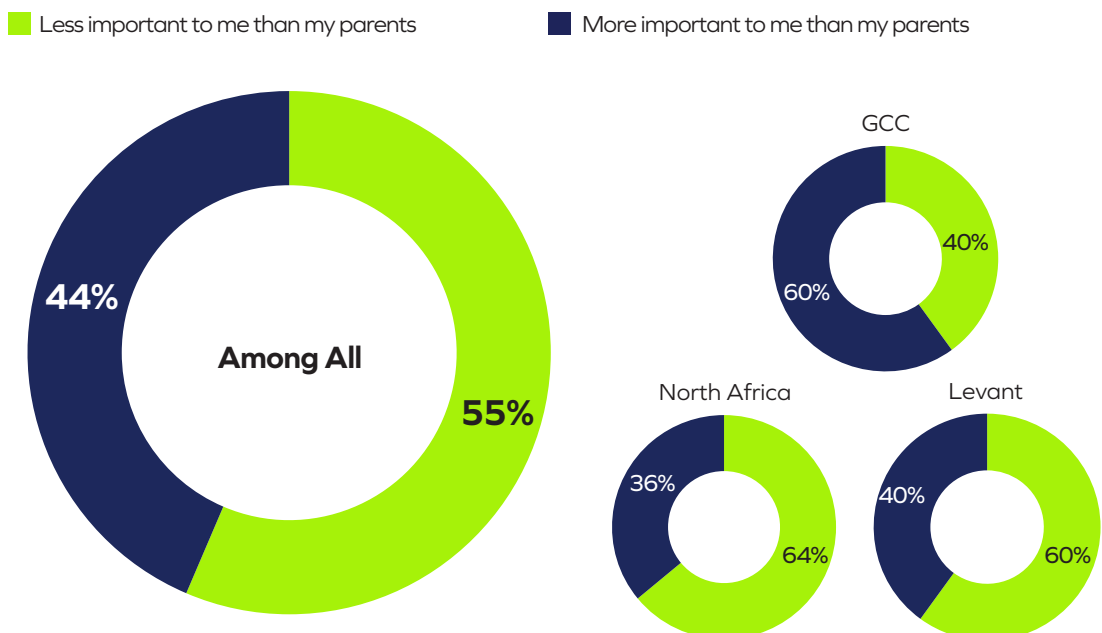
(Showing percentage, among all)



## A majority of young Arabs outside the GCC say the Arabic language is less important to them than their parents

Which of the following is closer to your point of view? The Arabic language is...

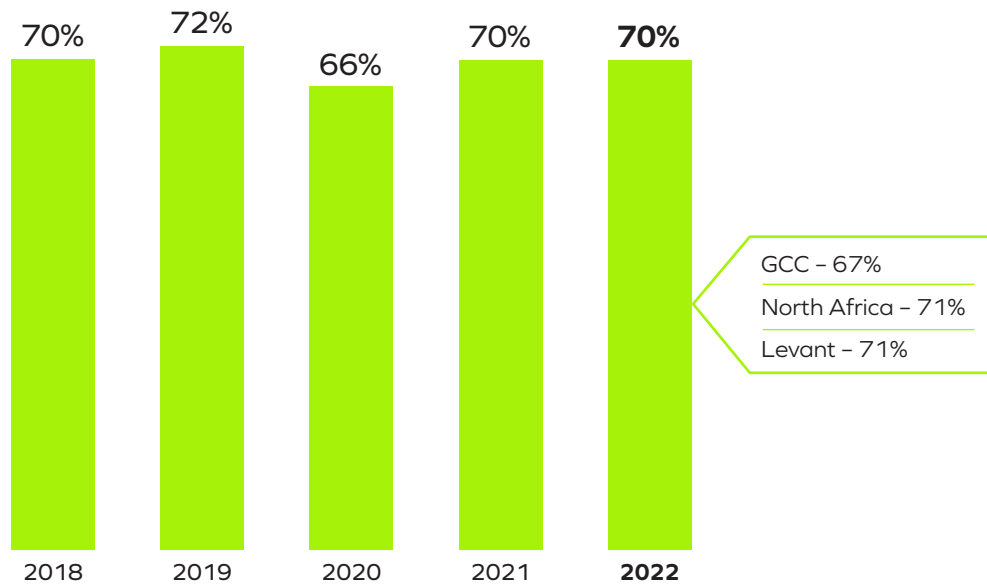
(Showing percentage, among all)



(Not including 'Don't know')

## Nearly three-quarters of young Arabs are concerned about the loss of traditional values and culture

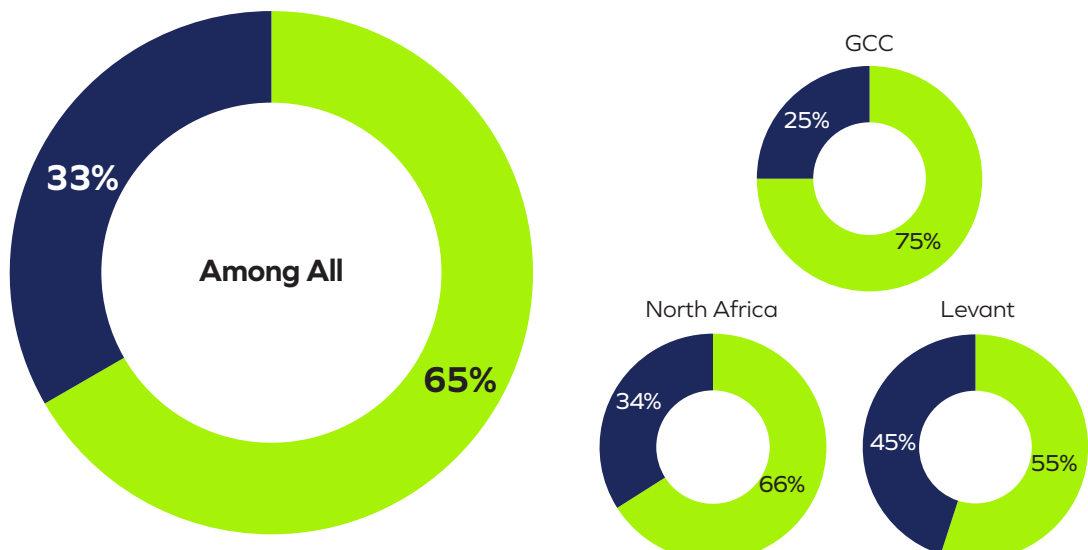
How concerned would you say you are about the loss of traditional values and culture?  
 (Showing percentage, among all, saying 'Very concerned' and 'Somewhat concerned')



## Most young Arabs say preserving their religious and cultural identity is more important than creating a more globalised society

Which of the following is more important to you?  
 (Showing percentage, among all)

■ Preserving our religious and cultural identity      ■ Creating a more tolerant, liberal and globalised society

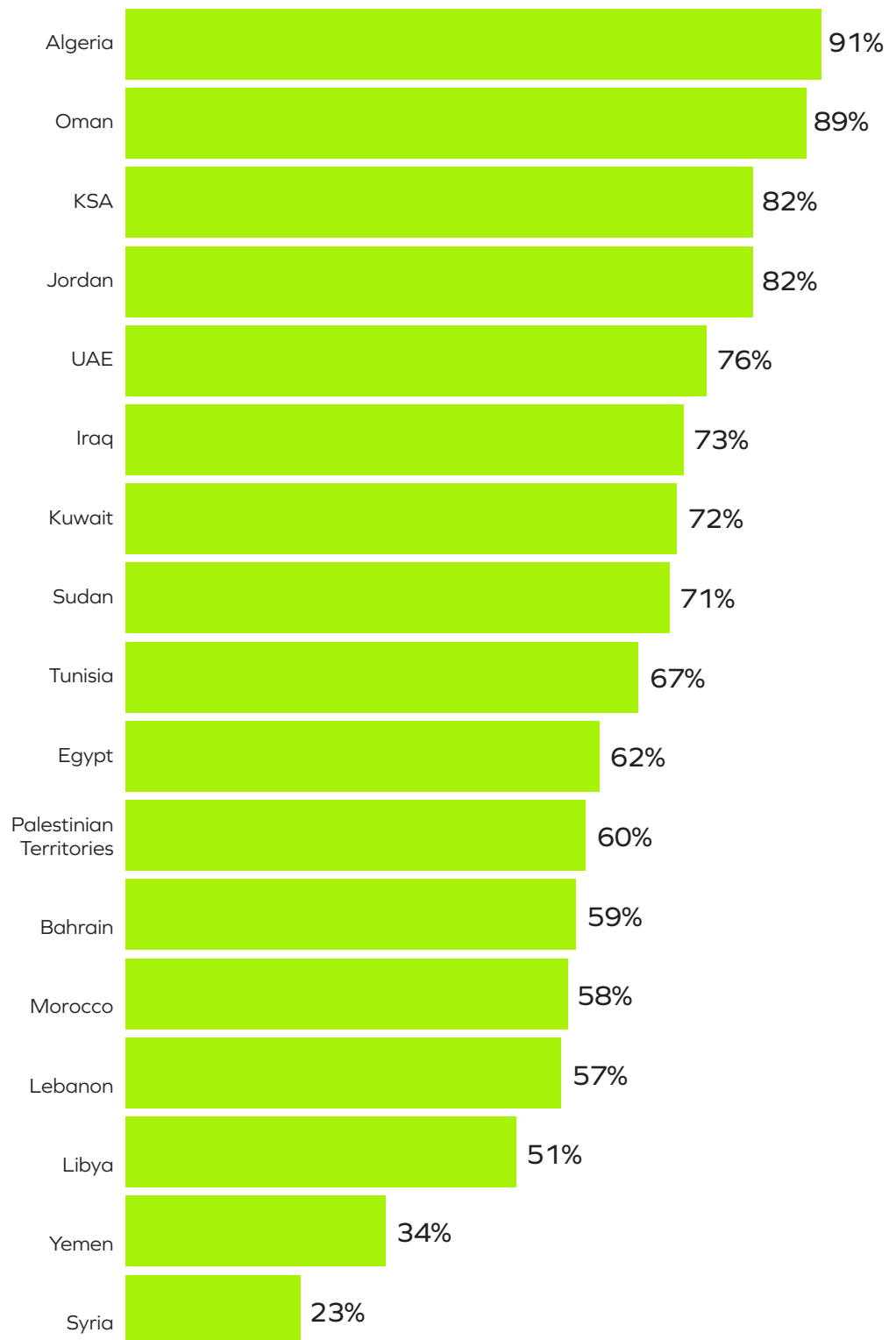


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## More young Arabs want to preserve their cultural identity, except for youth in Syria and Yemen

Which of the following is more important to you?

(Showing percentage, among all, saying: 'Preserving our religious and cultural identity')



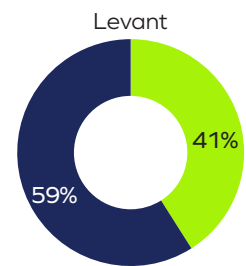
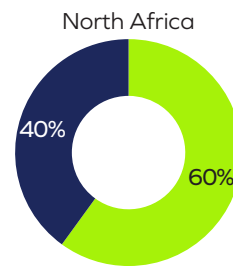
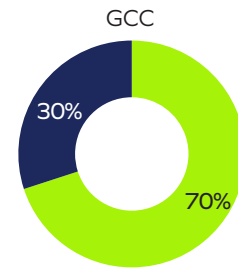
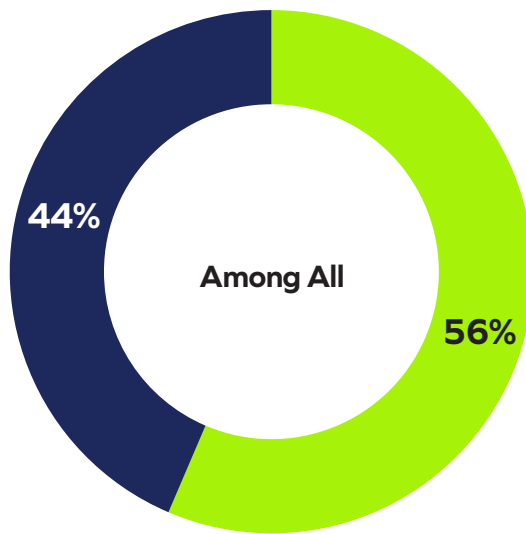
## A majority of young Arabs say the laws in their country should be based on Sharia

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

(Showing percentage, among all, answering)

■ The laws of my country should be based on Sharia/Islamic law

■ The laws of my country should be based on civil/common law



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# Decoding the Arab world's unrelenting battle of ideas and ideals

Khaled Almaeena is the Managing Partner of Quartz, a communication company, and director of Abeer Medical Group. He has held a range of positions in the Saudi media industry for the past 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 regularly appear in Gulf News, Asharq Al Awsat, Al-Eqtisadiyah, Arab News, Times of Oman, Asian Age, Al Arabia, Makkah, the China Post and the Saudi Gazette. Almaeena was awarded a doctorate in humanities from Mindanao University in the Philippines in 2009. He is also a visiting non-resident scholar at the University of Central Florida.



**Khaled Almaeena**

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The 14th annual ASDA'A BCW Arab Youth Survey delivers some interesting insight into the ever-fluid state of young people across the Arab world, where there is great diversity in opinions, views, habits and customs. The survey also provides a useful tool for policymakers in helping shape future plans and policies.

Identity is a big issue at the moment. The Arab world has been exposed to new ideas for decades, but the past few years have seen a rapid influx of new ideas; something akin to a cultural onslaught. The rapid uptake of social media has contributed to this fast development.

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**The way to challenge such social evolution is by holding firm to religion and making it a protector of people's identity. Nationality, family or tribe, and cultural heritage constitute shields to preserve identity.**

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Young people across the Arab world are deeply engaged in this cultural phenomenon. The social and cultural upheavals following the Arab Spring have also created a new mindset among regional youth.

Arab youth, like young people across the globe, are not complacent nor indifferent to their surroundings. They rightly ask and aspire for more.

This year's ASDA'A BCW Arab Youth Survey is telling. It shows that young Arabs prefer stability over democracy. They demand good governance, tolerance, new ways to express themselves, and social justice.

Regional policymakers would do well to take a serious look at this year's findings. After all, failure to deliver on young people's aspirations does not bode well for the region.

The survey shows that identity is an issue of paramount importance for Arab youth. Interestingly, there has been a 7 per cent increase over the previous year in young people saying their religion is important to their identity. A clear majority also express concern about declining traditional values and culture.

Religion remains a cornerstone of people's identity in the Gulf – regardless of how much social mores and demographics change. I believe the 7 per cent increase in the importance of religious identity – compared to 2021 – will continue to grow in future years.

Alarm bells are already ringing due to what many regional young people see as a bizarre social evolution happening in the Western world. The majority of young Arabs, at least in the Gulf, do not want to be a part of this.

The way to challenge such social evolution is by holding firm to religion and making it a protector of people's identity. Nationality, family or tribe, and cultural heritage constitute shields to preserve identity, further enveloped by religion and faith.



## The more the insidious attacks on sacred Islamic law by elements from outside the Muslim and Arab world, the more there will be a rising number of Arabs, not only the young but across all ages, who come out in support of Sharia

Any perceived 'foreign cultural invasion' should then be contained by these combined elements.

Notably, there is an outcry about the declining standards of the Arabic language across the Arab world. A growing number of voices – both in academia and government – bemoan the language's receding role and stress the need to give it greater prominence in both the commercial and official sectors. This has also resulted in severe criticism of foreign education institutions which do not prioritise Arabic in their curricula.

While we call for our societies to become global in their attitude and outlook, I doubt anyone would want to divest us from our rich cultural and religious identities. This point is clear from the survey results. For example, 70 per cent of young people in the GCC, and 60 per cent in North Africa, say Sharia principles should form the basis of their legal systems.

However, they would like codification of Sharia laws to facilitate a proper judicial system that is open, fair and transparent. Let me also add, the more the insidious attacks on sacred Islamic law by elements from outside the Muslim and Arab world, the more there will be a rising number of Arabs, not only the young but across all ages, who come out in support of Sharia.

Yes, the Arab youth want progress and development. They want to be part of a healthy society, they want productive and useful working environments where they can progress, advance and show their worth. They also want to be a part of the decision-making process in matters that concern and affect them.

"We have a soul," a young, highly educated woman from a Gulf Cooperation Council country told me. "And what is that 'soul'?" I asked. Her reply took me aback: "Our religion, our language and our culture."

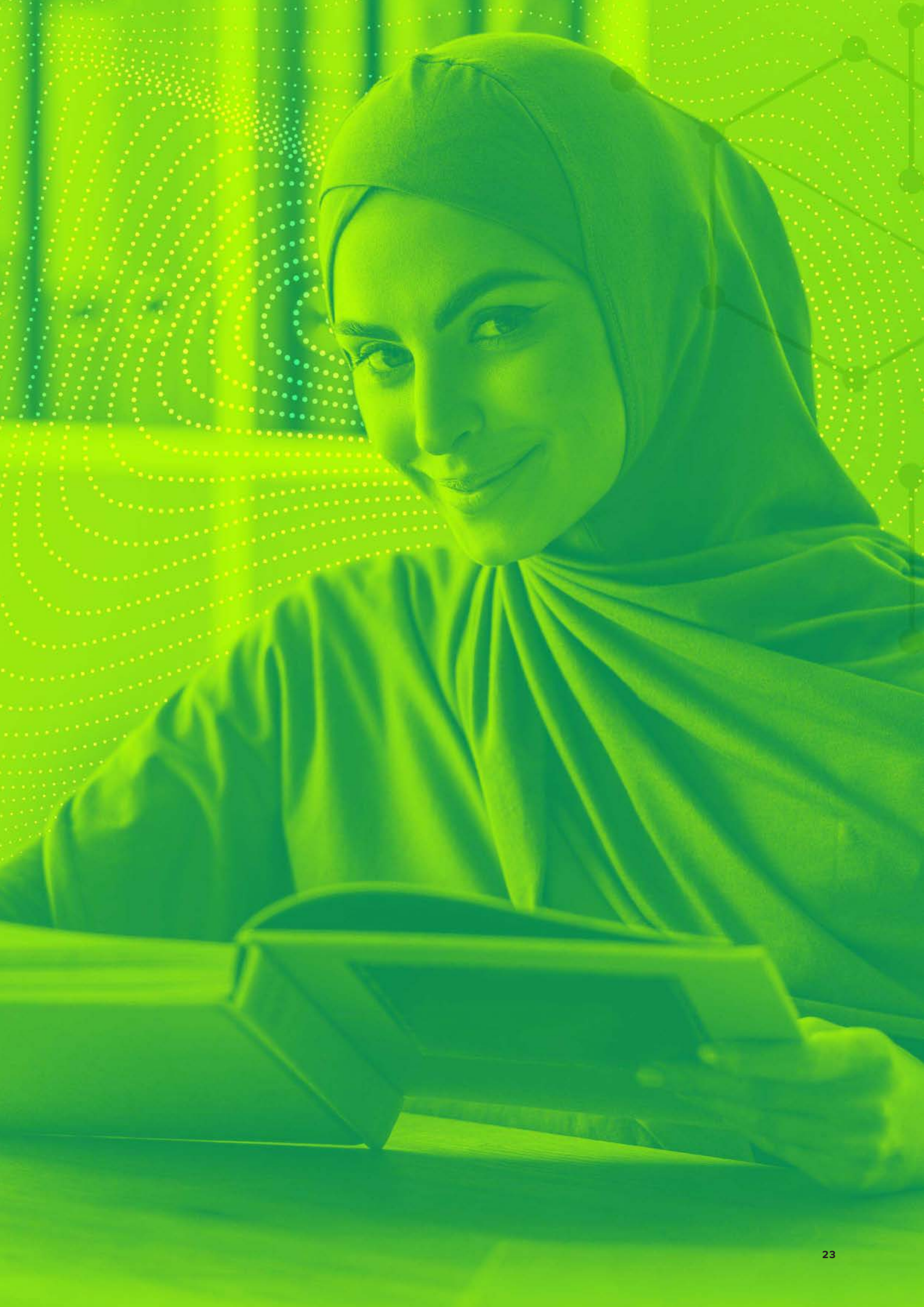
There is an unrelenting battle of ideas and ideals taking place throughout the Muslim world. A conflation between the Islamic and Western concepts of life, values and traditions. This young woman's response for me was telling. It is a strong indicator that regardless of what happens on the global cultural and social scenes, religion remains at the core of everything in this part of the world. It is part of our DNA.

# 2

## MY LIVELIHOOD

Young Arabs are concerned about the quality of education, lack of jobs and rising personal debt, and many are turning to entrepreneurship, rather than depending on government or private sector jobs





It has been a perfect storm, leading to an unprecedented global cost of living crisis. The COVID-19 pandemic, the war in Ukraine, climate change, slowdown in China – and ultimately, the spectacle of spiralling inflation – have wreaked economic havoc across the world.

Some of the world's poorest countries, such as Yemen, have seen basic food prices rise by more than 85 per cent in a single year. Inflation in Arab countries is expected to rise to 7.5 per cent in 2022 compared with 5.7 per cent in 2021, while global inflation is expected to hit 6.7 per cent this year, according to the United Nations.

But there are some spectacular regional outliers, such as Lebanon's annual inflation rate which hit 215 per cent in February. The war in Ukraine has directly affected food and energy prices.

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### **The rising cost of living and unemployment have remained the top concerns of young Arabs across all 14 years of the survey.**

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With challenging economic conditions in many areas across the region, it is little surprise that the biggest obstacle to growth is seen as the rising cost of living (35%) followed by unemployment (32%).

These two have remained the top concerns of young Arabs across all 14 years of the survey, except in 2016 and 2017, when the rise of Daesh (ISIS) and the threat of terrorism ranked higher.

When it comes to education, there is huge concern (83%) over the quality of education offered across the region. Concern about the quality of education in their country is high across all three regions – including in the GCC.

The quality of education, in turn, affects employment prospects. In the Arab world, youth unemployment has been one of the persistent concerns. A decade ago, the World Economic Forum reported that there is an urgent need to create 100 million jobs in the region. Yet, today, the region continues to have record levels of youth unemployment – at over 25 per cent – rising to 40 to 50 per cent in some Levant nations.

This year, when asked how difficult it was to find a job in their country, nearly half of all young Arabs said it was difficult. This rises in the Levant to 73 per cent. More than half (55%) in North Africa share this concern. The exception is the GCC where 15 per cent said it would be difficult to find a job, and a majority (48%) saying it was neither difficult nor easy.

What these results have led to is possibly the most significant shift this year: the desire to work for themselves. The lure of a government job, once seen as a job for life, is falling – desired by 39 per cent, a fall of 10 per cent in just three years. The private sector is sought by 20 per cent, again a considerable fall of 8 per cent in just three years: all of which has resulted in an increase of 12 per cent, to 28 per cent, of young Arabs now wishing to work for themselves.

Young Arabs in the Levant and North Africa especially want to see stable government and monetary policy to promote entrepreneurship but those in the GCC favour more government jobs.

Either way, the trend is clear. For several years, industry experts have been calling for the creation of millions of jobs in the private sector to solve the unemployment problem.

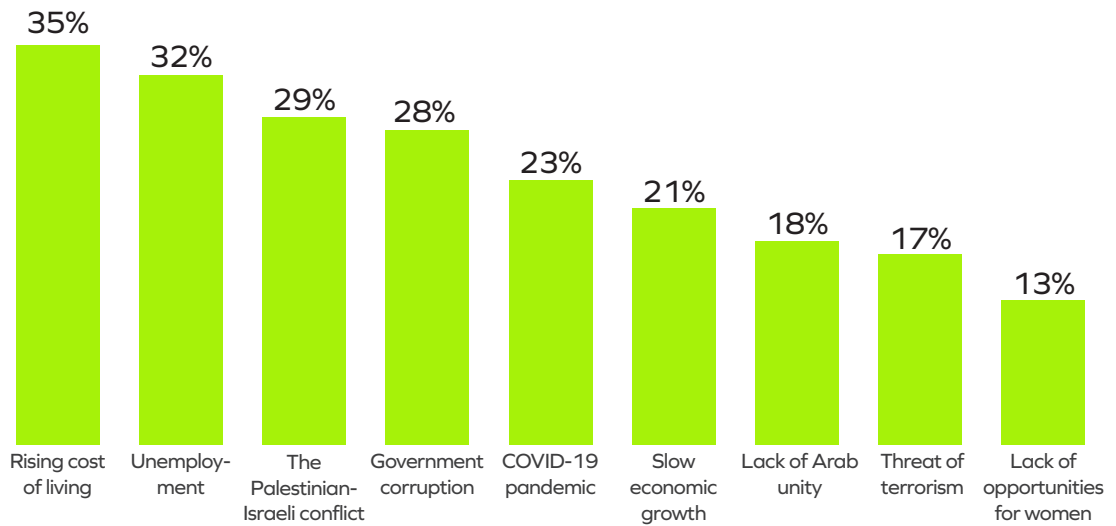
The results suggest young Arabs are no longer prepared to wait for this, and in parallel, the traditional allure of government jobs is waning.



## Young Arabs say the rising cost of living and unemployment are the biggest obstacles facing the region

What do you believe is the biggest obstacle facing the Middle East?

(Showing percentage, among all)

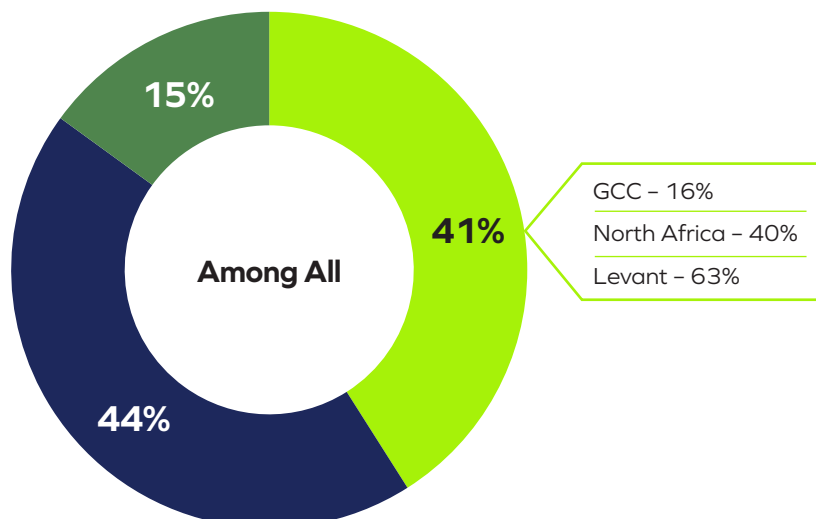


The rising cost of living and unemployment have remained the top concern of young Arabs across all 14 years of the survey, except in 2016 and 2017, when the rise of Daesh and the threat of terrorism ranked higher

## More than a third of young Arabs struggle to meet their basic expenses, rising to more than two-thirds in the Levant

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

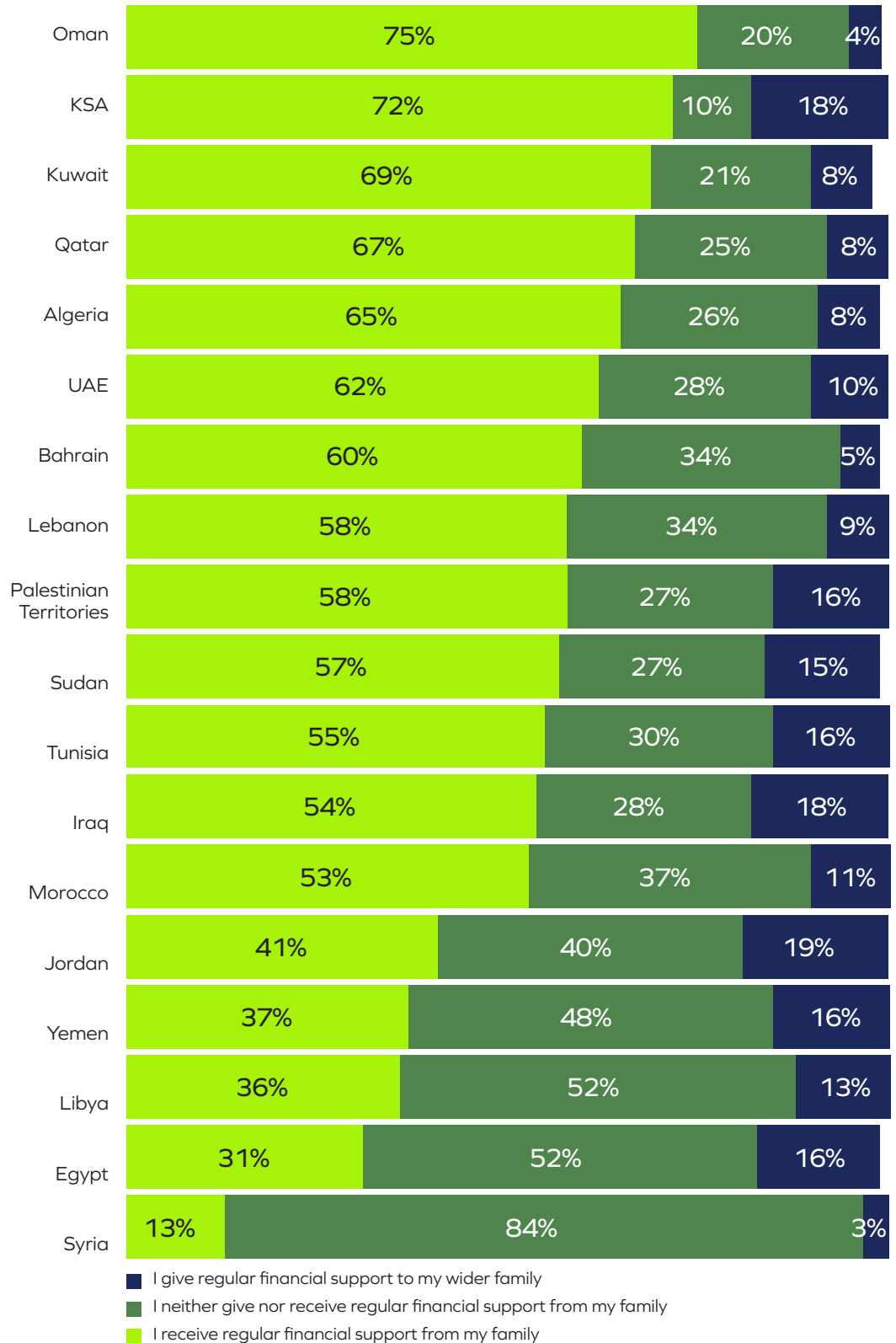
- I struggle to pay my expenses in full
- I am able to pay my expenses in full, but usually have no money left for savings
- I am able to pay my expenses in full, and usually have some money left for savings



## Most young Arabs look for financial support from their family

Which of the following applies to you?

(Showing percentage, among all)



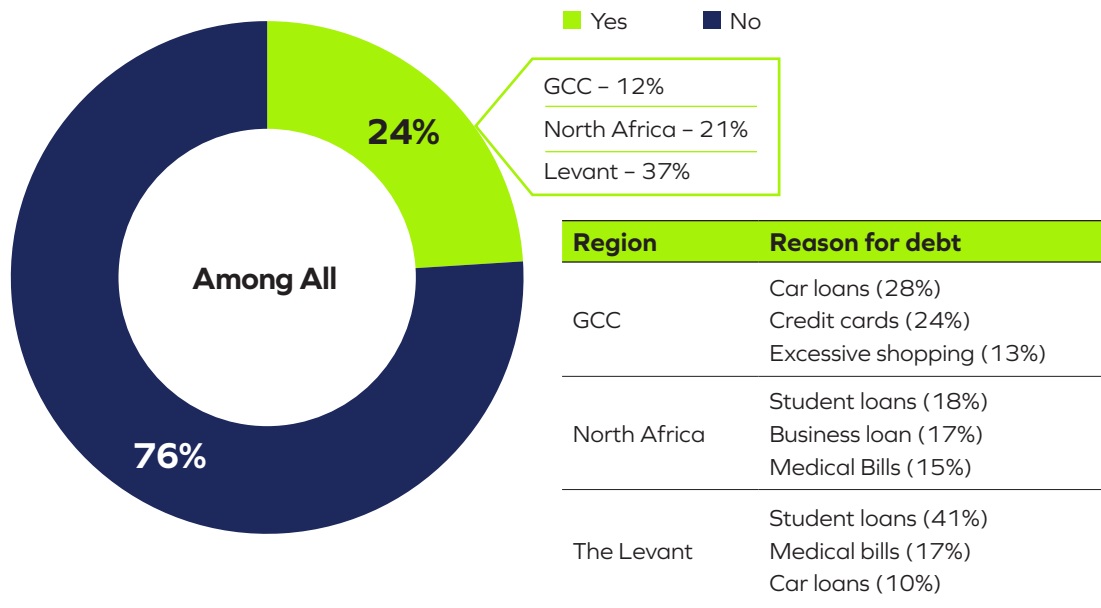
(Not including 'Don't know')

## A quarter of young Arabs are in personal debt

Student loans, car loans and healthcare bills are the top reasons

Are you currently in debt?

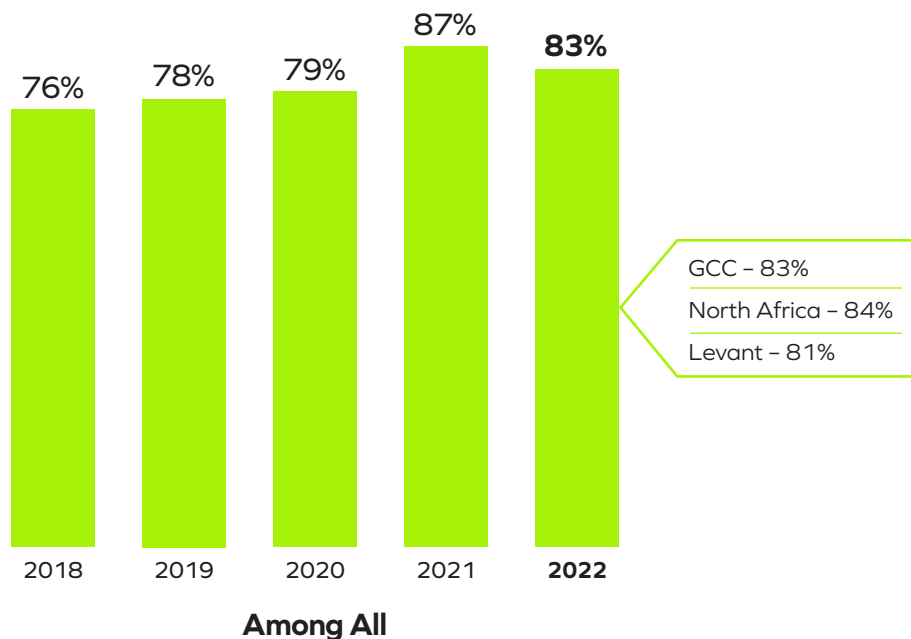
(Showing percentage, among all)



## Eight in 10 young Arabs are concerned about the quality of education in their country

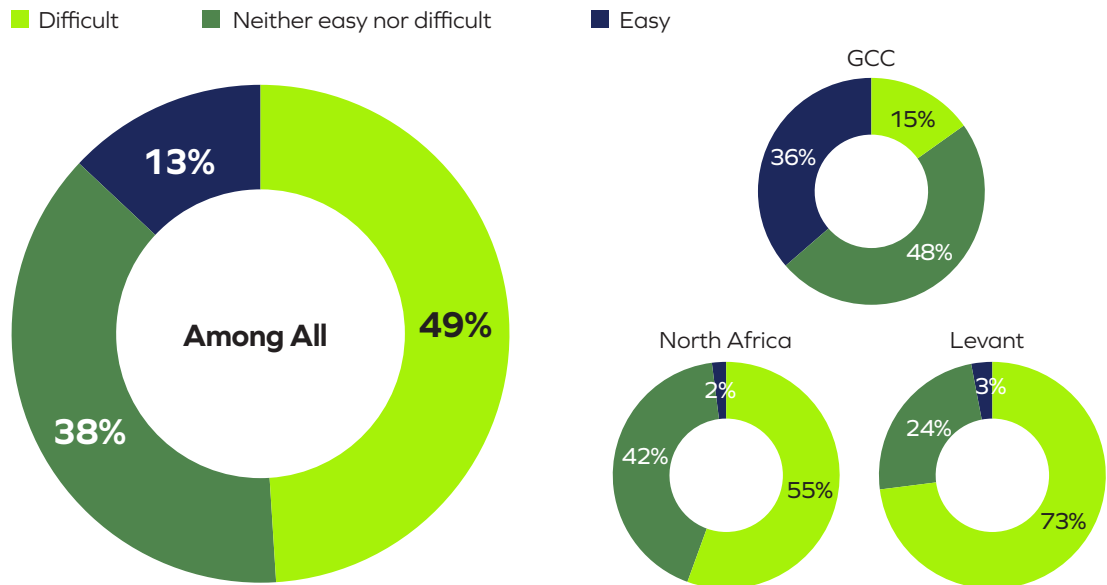
How concerned are you about the quality of education in your country?

(Showing percentage, among all, saying 'very concerned and somewhat concerned')



## Half of Arab youth believe it would be difficult to find a job in their country

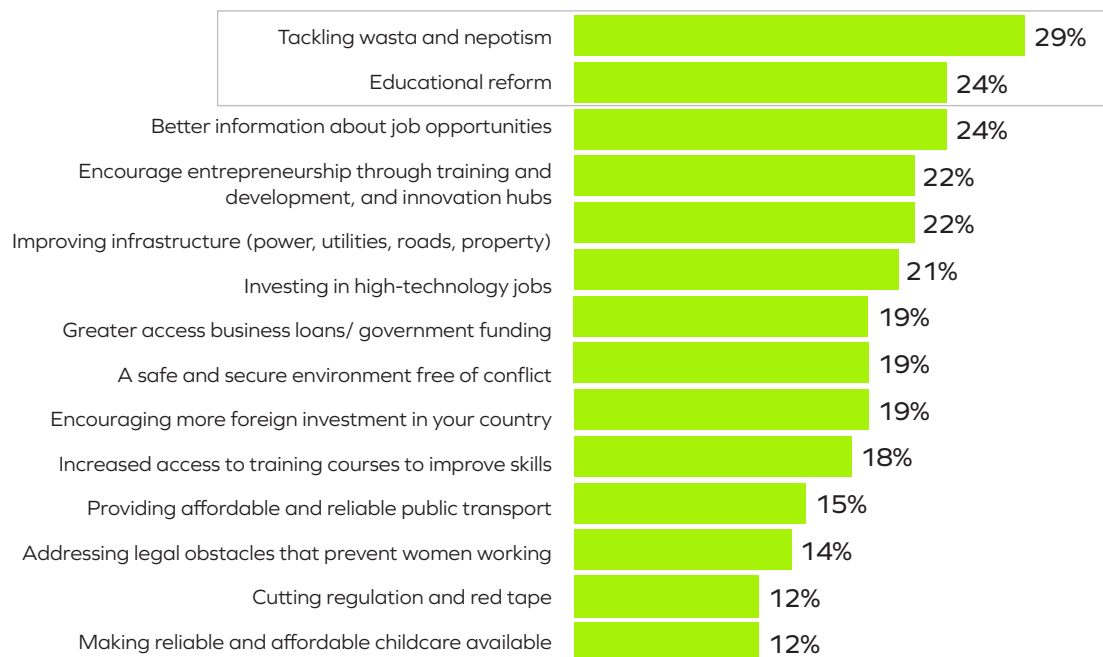
Thinking about the job market in your country, would you say that finding a new job in your country is currently...



(Not including 'Don't know')

## To create more jobs, governments must prioritise tackling corruption and educational reform

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

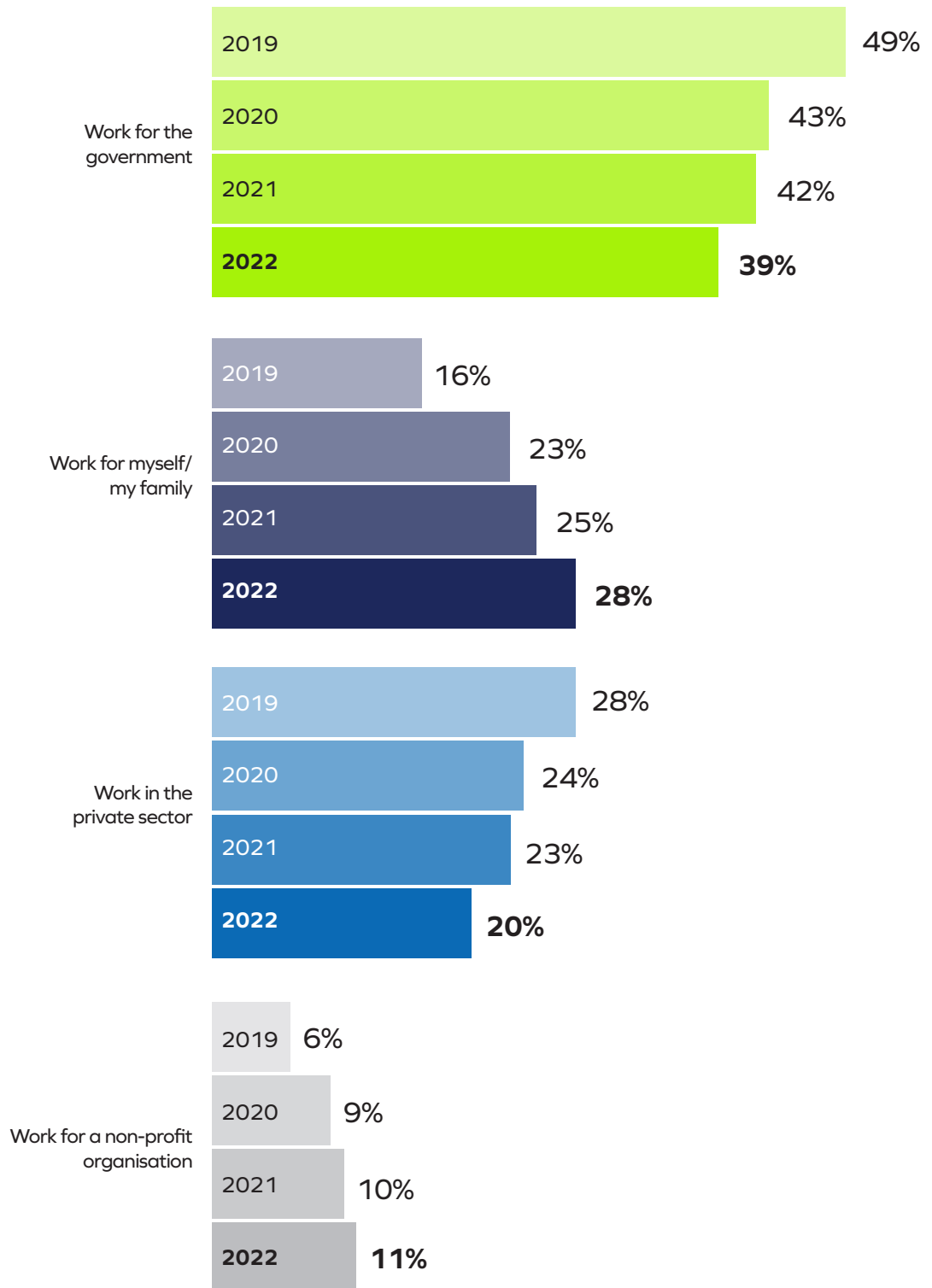


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## More young Arabs are interested in working for themselves

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

*(Showing percentage, among all)*



(Not including 'Don't know')

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# Deeper reforms herald opportunities for Arab youth

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.



**Dr Jihad Azour**

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This year's ASDAA BCW Arab Youth Survey was completed in a highly uncertain and fragile context. Rapidly rising commodity prices have fuelled inflation worldwide. In the Arab world, inflation averages more than 15 per cent. Higher food prices have especially hurt low-income households and undermined food security in many parts of the region.

Over the long term, the world economy may face potential fragmentation into geopolitical and economic blocs, which could jeopardise progress made over the past several generations to raise living standards and promote inclusion.

In this context, I am not surprised that rising living expenses and unemployment are the most pressing concerns for young Arabs in this year's survey, and that disparities across the Arab world remain.

The survey reveals that 41 per cent of respondents struggled to pay their expenses in full last year, up from 37 per cent in 2021. This share is much higher in the Levant, where it reached 63 per cent in 2022.

Moreover, the survey shows that low-quality education and problems finding a job continue to cloud the youth's perception of the future.

About 83 per cent of the youth are concerned about the quality of education in their country. And, while only 15 per cent of young Arabs believe it is difficult to find a job in a GCC country, that share rises to 55 per cent in North Africa and 73 per cent in the Levant.

I am very encouraged that this year's survey shows that the entrepreneurial spirit is alive and well among the Arab youth.

More young Arabs are turning to entrepreneurship and private sector jobs and relying less on government jobs. This will help unleash dynamism and growth, which will translate into more opportunities for future generations.

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## The survey shows that low-quality education and problems finding a job continue to cloud the youth's perception of the future.

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The survey provides highly relevant insights for policymakers. First, there is a need to mitigate the impact of high inflation on the population. In many countries, this will require decisive policy measures.

Second, providing better opportunities for the youth is the most important priority. Policymakers must continue to implement long-term reforms.

When asked about what can be done to improve their chances of finding a job, young Arabs say: first, fight corruption and nepotism; and second, improve education.

There is a lot that policymakers can do to create better opportunities. Reforms in the education system that provide skills that are attractive to employers, now and in the future, and that encourage young Arabs to become entrepreneurs, are of utmost importance.





**We must encourage policymakers to take urgent action on climate change. Food supplies and prices in the Arab world are highly vulnerable to climate change because the region relies on a very high quantity of food imports. Therefore, climate events in other parts of the world affect our food supply.**

In addition, policymakers can improve the business environment so that young entrepreneurs can succeed and grow their businesses. This can be done by removing obstacles to their operations (including poor transparency in the provision of public goods and services) and improving access to credit.

We must encourage policymakers to take urgent action on climate change. Food supplies and prices in the Arab world are highly vulnerable to climate change because the region relies on a very high quantity of food imports. Therefore, climate events in other parts of the world affect our food supply.

Policymakers must take decisive measures to protect food production and distribution from weather events and ensure food security, such as investing in climate-resilient infrastructure, using water more efficiently, and

improving the management of food stocks and supply chains at the national level.

We are here to help. The IMF is committed to supporting the region through financing, capacity development, and policy advice. Since the start of the pandemic, we have made available US\$53.8 billion in financial resources to Arab countries. We are also enhancing our lending toolkit to better help countries deal with new challenges.

To help address the urgent food crisis facing our most vulnerable members, we are considering establishing a new food-shock lending window. We have also established the new Resilience and Sustainability Trust to support low-income and middle-income countries in building resilience and addressing longer-term challenges, including climate change and future pandemics.

# 3

## MY POLITICS

The Arab Spring generation says promoting stability is more important than democracy



**M**ake no mistake, this is the Arab Spring generation. Many are only now coming into their formative years, having witnessed at an early age the historical events that swept the region in 2011.

But just over a decade later, how have those monumental changes affected their thinking? In many ways, we appear to revert to the common thread in 2022 of young Arabs being at a crossroads.

The Arab Spring was largely a call for democracy in the Levant and North Africa, and today an overwhelming 82 per cent say that promoting stability is more important than democracy.

In contrast, our 2009 survey, prior to the events of Arab Spring, reported 92 per cent of young Arabs saying 'living in a democratic country' was their single most important priority. Today, two-thirds (64%) of young Arabs go as far as to say democracy will never work in the region.

Having said that, 63 per cent believe that they now enjoy more freedoms thanks to the Arab Spring. But this comes with a caveat. Almost the same number (60%) believe that government plays too big a role in their daily lives.

Yet again almost the same number say their voice matters to their leadership, especially in the GCC where this number rises to 88 per cent.

The regional variation continues with the same number in the GCC, 87 per cent, confident their governments have the right policies to address their issues, compared to just 21 per cent in the Levant.

The other notable trend is in gender equality. This has long been seen as the cause of many of the region's economic woes, with women either choosing to stay at home or not having the opportunity to work.

This however is not reflected in the results: nearly two-thirds (59%) believe men and women now have equal rights, and a huge majority (82%) believe that having more women in the workplace will benefit their country.

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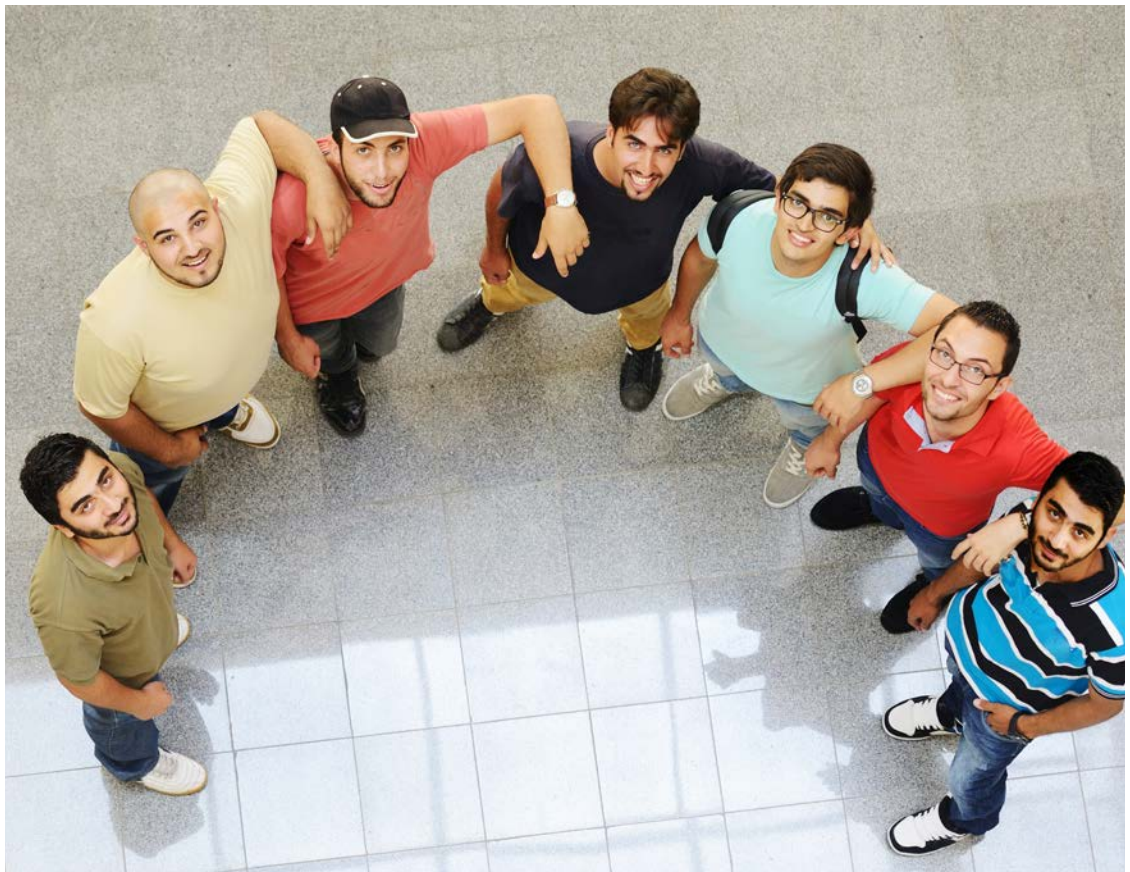
**Two-thirds (63%) of young Arabs believe they now have more freedoms thanks to the Arab Spring but almost the same number (64%) say democracy will never work in the Middle East.**

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But they point to a lack of jobs, lack of flexible hours and cultural obligations as the main barriers to progress.

So, just what are young Arabs thinking? When it comes to their politics, they appear to revert to the crossroads, and uncertainty over which direction to turn.

Eleven years since the Arab Spring, the clamour for democracy (outside the GCC) is rapidly falling, and there are serious doubts it could ever work – but it has not gone away.

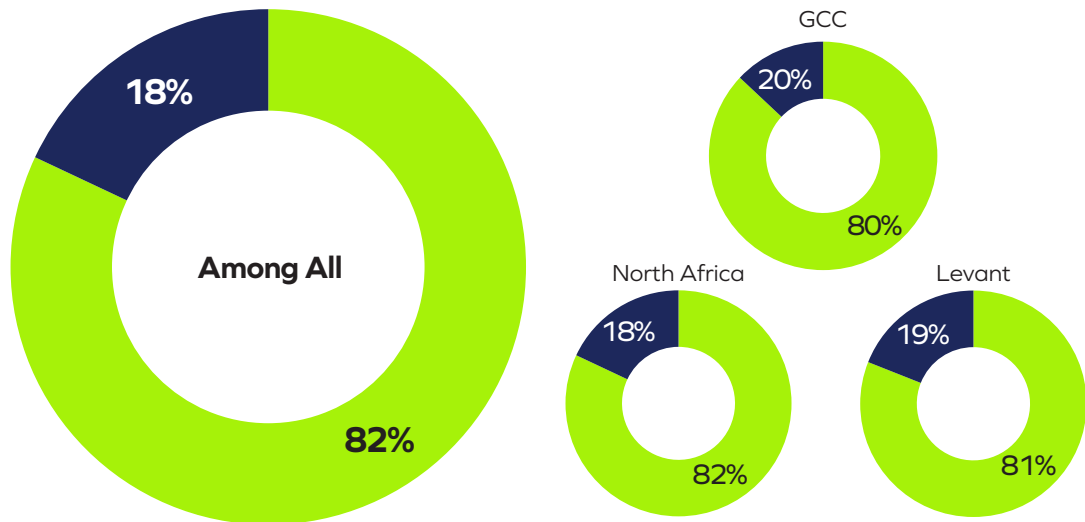


## An overwhelming majority of young Arabs say promoting stability is more important than democracy

How strongly do you agree or disagree with the statement, 'Promoting stability is more important than promoting democracy'?

■ 'Strongly/Somewhat Agree'

■ 'Strongly/Somewhat Disagree'

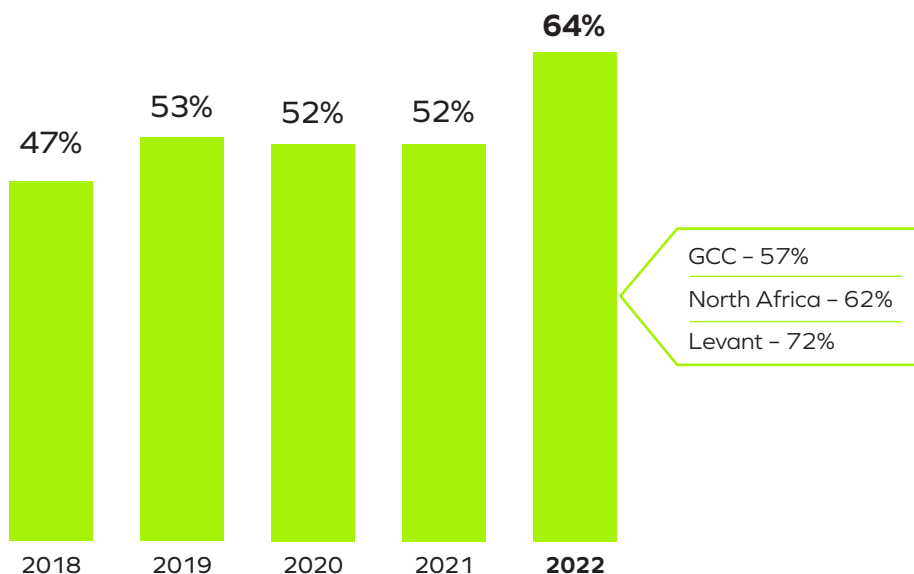


In contrast, our 2009 survey, prior to the events of the Arab Spring, reported 92% of young Arabs saying 'living in a democratic country' was their single most important priority

## Nearly two-thirds say democracy will never work in the Middle East, rising to about three-quarters in the Levant

How strongly do you agree or disagree with the statement, "Democracy will never work in the Middle East"?

(Showing percentage strongly agreeing)

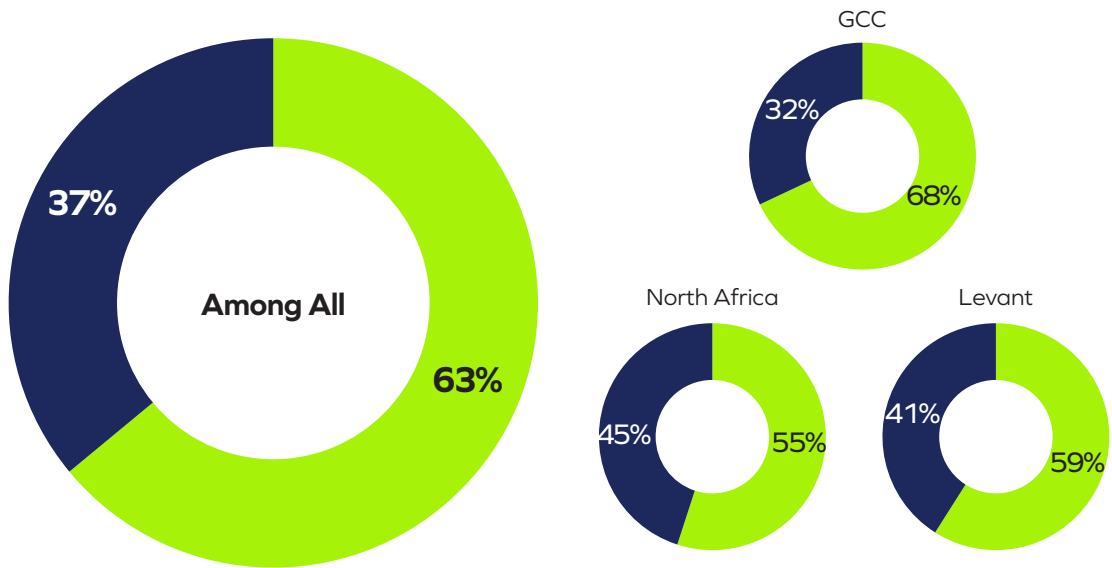


## A majority of young Arabs say they enjoy more rights due to the Arab Spring, more so in the GCC

How strongly do you agree or disagree with the statement, "Young Arabs like myself have more rights and freedoms today because of the Arab Spring?"

■ 'Strongly/Somewhat Agree'

■ 'Strongly/Somewhat Disagree'

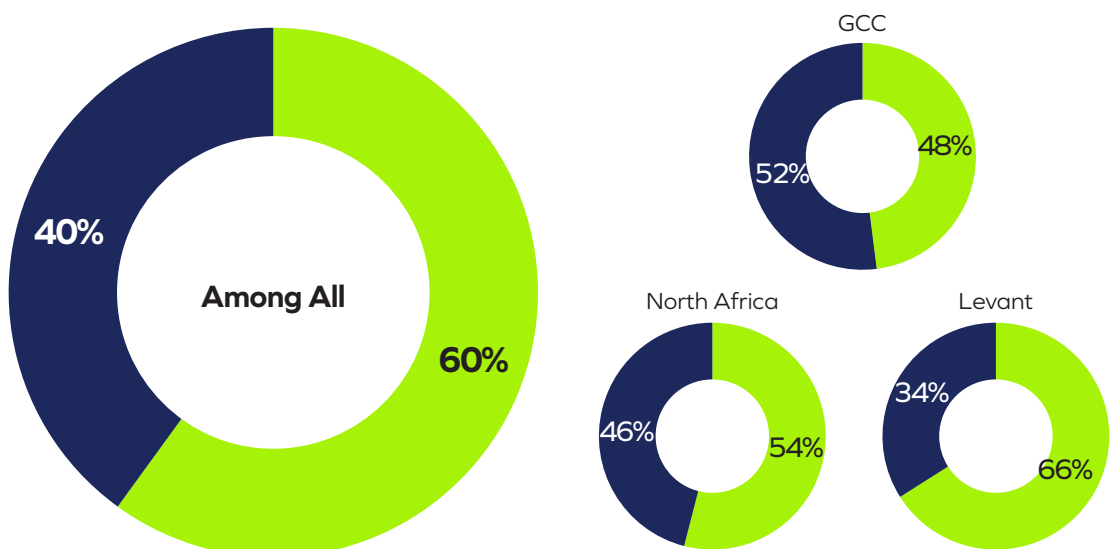


## However, many young Arabs say they are concerned about the increased role of government in their daily life

How concerned are you with 'the increased role of government in your daily life?'

■ 'Very/Somewhat Concerned'

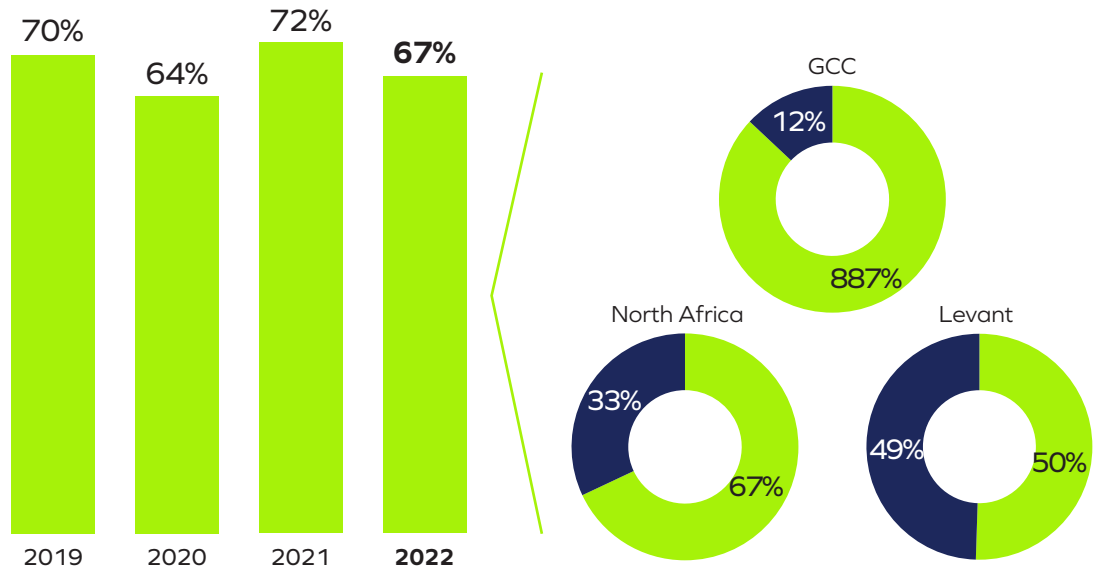
■ 'Not at all/Not too Concerned'



## Two-thirds of young Arabs say their voice matters to their leadership

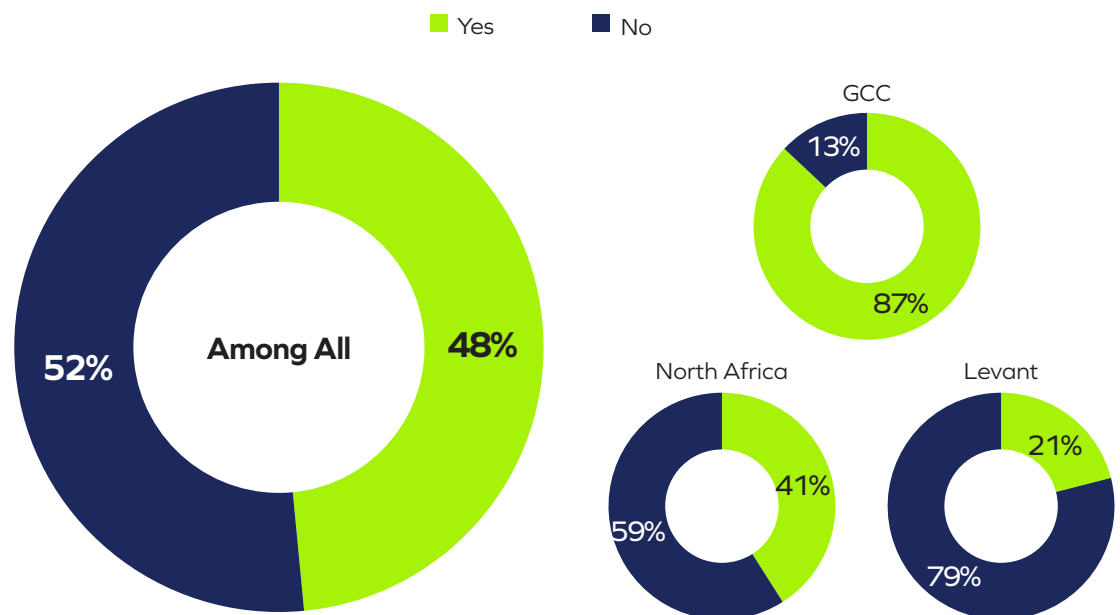
How strongly do you agree or disagree that your voice matters to your country's leadership?

(Showing percentage strongly agreeing)



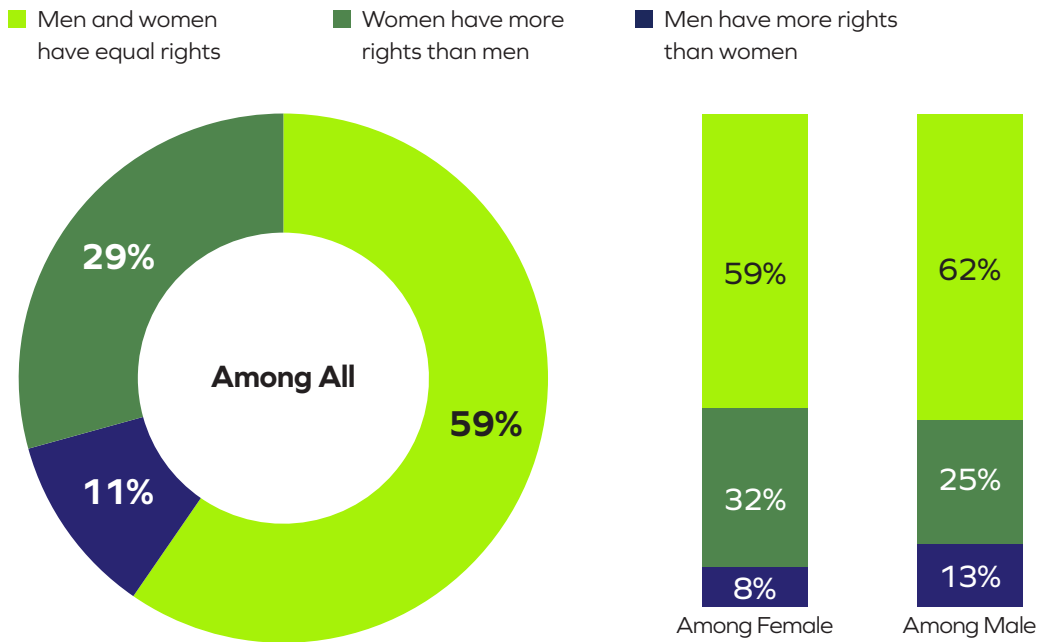
## But less than half, except in the GCC, feel their governments have the right policies to address their issues

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



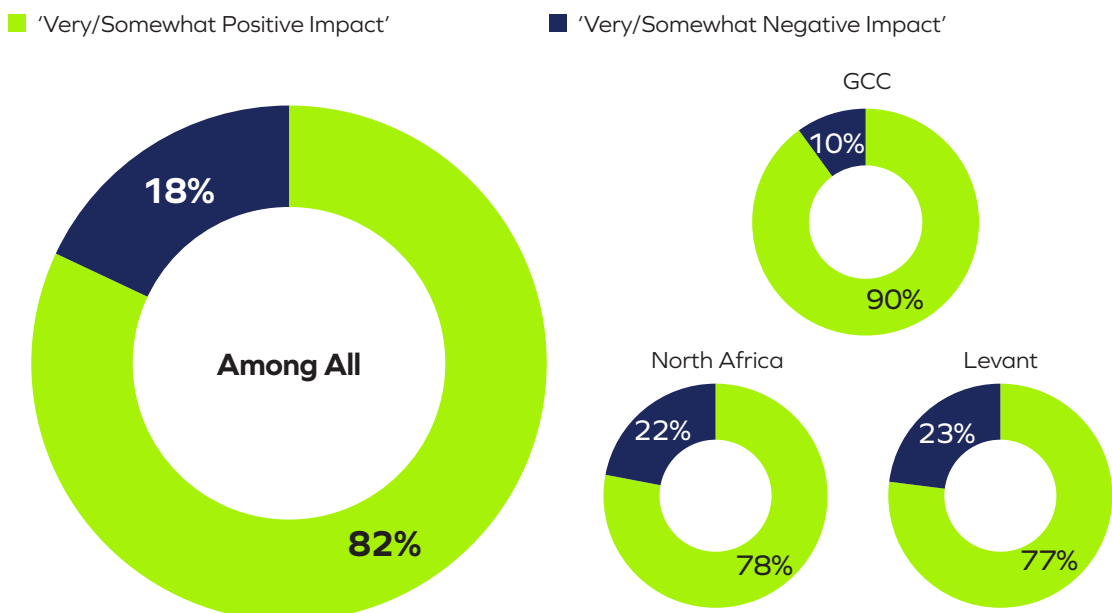
## A majority of young Arab women and men say they have equal rights

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



## Most young Arabs believe having more women in the workplace will benefit their country

As more women enter the workplace in your country, will that have a positive or negative impact on your country?

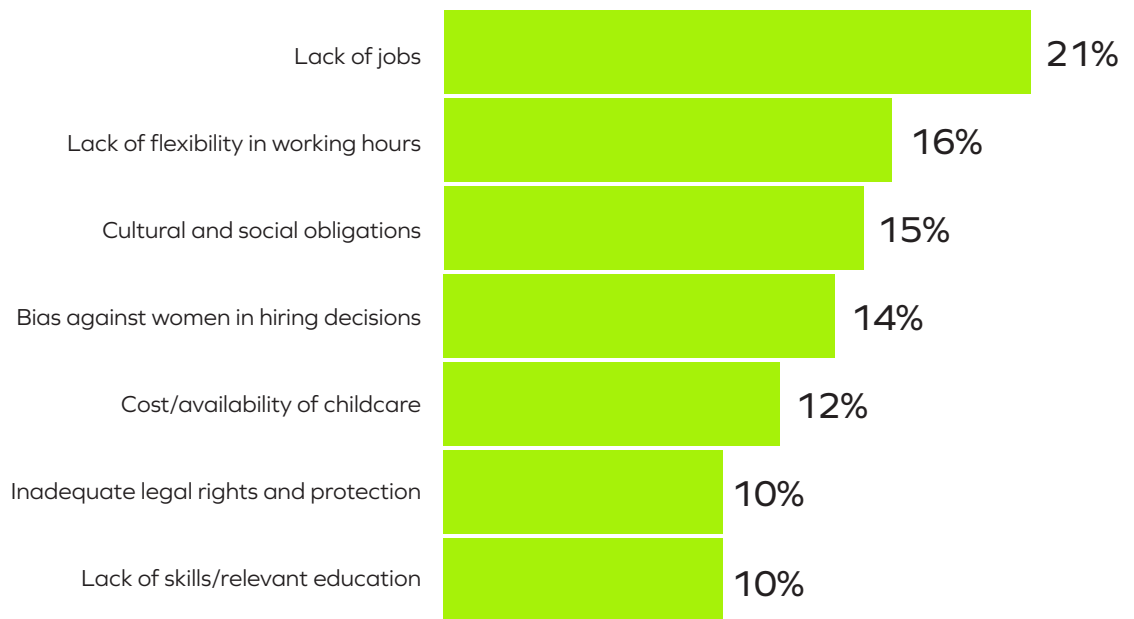




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## Lack of jobs and flexible working hours, social obligations and bias are holding women back

Which of the following, if any, do you think is the main barrier stopping more women accessing secure and well-paid jobs in your country?



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# In a changing world, young Arabs face an uncertain future

Faisal Al Yafai is a partner at Hildebrand Nord, a journalist at New Lines Magazine in Washington, DC, and a playwright. He has worked as a journalist in several Middle Eastern countries and was previously an investigative journalist for The Guardian in London and a documentary journalist for the BBC. He has reported from across the Middle East, from Eastern Europe and Africa.

His reporting and commentary have tracked the Arab Spring, from early reports on the ground in Tunisia, through interviews with politicians, thinkers and the public, to essays exploring the roots, ideas and impact of the revolutions.

His columns on foreign policy, economics and international affairs are published and syndicated in Europe, the Middle East and East Asia. A frequent guest on television networks such as CNN, the BBC and France 24, he has also served as a Churchill Fellow in Lebanon and Indonesia.

**Faisal Al Yafai**



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**A**nother globally tumultuous year has passed and, once again, the ASDA'A BCW Arab Youth Survey has thrown up some intriguing views from young Arabs across the region. This year's respondents are a fascinating cohort, an 'Arab Spring generation' of those who came of age in the 10 years since the revolutions crossed the Middle East.

The youngest respondents to this year's survey would have barely been seven years old when the Arab Spring swept across the region in 2011. The oldest, now 24, could well have been among those demonstrating. What do they think about politics now, a decade on?

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## **Thirteen years ago, a majority of young Arabs believed democracy was their highest priority, above jobs and education.**

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The first and most attention-grabbing finding is that a majority agreed "promoting stability is more important than promoting democracy" – a headline finding that many will find disappointing, given how many of the most important conversations around the Arab Spring had to do with that very topic.

But of course, political sentiments don't occur in a vacuum, separate from politics. In one sense, that view of the promotion of democracy is completely unsurprising. Young Arabs have lived through a period where the Arab Spring has brought instability and conflict – a response in no way related to their aspirations, it hardly needs saying – but also one in the shadow of the Iraq war, an exercise in democracy promotion that shattered one of the world's greatest civilisations. Small wonder, under those circumstances, that young Arabs prioritise the promotion of stability over democracy.

Yet there's something else that lies behind that sentiment, and it is a more global response than just the Arab Spring. Elsewhere in the survey, young Arabs said the rising cost of living and unemployment, as well as the pandemic, which is still a real issue, were the biggest obstacles facing the region.

The rising cost of living and spiralling inflation is hitting every country, from the United States to Indonesia. The Arab world is no exception. Even the richest countries in the eastern Arab world have experienced issues, and in countries like Egypt, the Ukraine war has had serious deleterious consequences.

Against that background, it should hardly be a surprise that stability is a priority. When more than a third of young Arabs struggle to meet their basic expenses and a quarter are in personal debt, political promises seem hazy. Young people in the Arab world, like young people everywhere, are starting their lives with a great deal of uncertainty.

(On a personal level, though, I was disappointed to see such a high percentage agreeing that "democracy will never work" in the region. Some of that can be attributed to the current sclerotic nature of Lebanese democracy and the battles over Tunisia's political direction, but the categorical nature of the statement is worrying.)

That said, one of the values of conducting these surveys across multiple years is witnessing the change in public opinion. In contrast to the overly pessimistic view of democracy, or rather the promotion of democracy, the 2009 ASDA'A BCW Arab Youth Survey, conducted before the startling scenes of the Arab Spring, found that 92 per cent of young Arabs believed "living in a democratic country" was not merely a priority, but their single most important priority.

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**The headline that should make every government fearful – yes, fearful – is the stark numbers that over 50% of young people in North Africa and the Levant are considering emigrating. The emigration of educated young people will make everything governments want to accomplish ten times harder.**

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That is to say, in 2009, 13 years ago, a majority of young Arabs believed democracy was their highest priority, above jobs and education.

That generation have 'aged out' against a tumultuous background; the youngest would now be in their 30s and the oldest almost 40. It is not merely the young who are living through immensely uncertain times.

Elsewhere, the survey paints a picture of what kind of society young Arabs want to live in. There's an intriguing contrast between the views of young Arabs about religion and its role in society. Asked what was most important to their personal identity, young Arabs chose religion as the most important aspect.

Yet at the same time, a majority felt that religion played too big a role in the Middle East – and not merely a small majority, but 76 per cent of respondents in North Africa and 78 per cent in the GCC.

Those kinds of findings warrant further study, because it isn't obvious if the reason why young Arabs want a smaller footprint for religion is to do with public expressions of faith – faith in politics, faith in the media – or private expressions of faith – its role in families and social structures, for instance.

That answer also appears to be at odds with the finding that a majority, at least in North Africa and the Gulf, believe the laws of their countries ought to be based on Islamic law rather than civil law. The debate is still a live one, and it gained a wider audience during the Arab Spring.

It's also interesting to note how few of the arguments of a previous generation now matter. A majority of both young Arab women and men now believe women have equal rights, but, crucially, a significant majority believe having more women in the workplace is beneficial. It feels as if a previous argument, about women in the workplace, has been consigned to history.

Still, jobs and education, the bread and butter of daily politics, matter immensely to young Arabs and the survey is permeated by concern about these issues.

Young Arabs are worried about the rising cost of living more than anything else; a vast majority are concerned about the quality of education available to them; half, across the region, think it will be difficult to find a job.

A majority, or nearly a majority, are worried about the role of government in their daily life; a vast majority in the Levant and North Africa think their governments have the wrong policies, with the notable exception of the GCC, where the numbers are starkly reversed.

And then the biggest one, the headline that should make every government fearful – yes, fearful – is the stark numbers that over half of young people in North Africa and the Levant are considering emigrating. The emigration of educated young people will make everything governments want to accomplish ten times harder.

On a personal level, I don't blame young people for losing faith – in politics, in governments, even in democracy. It is the role of politicians and the government to give young people reasons to maintain the faith. The same applies to young people staying in their home countries and building lives; again, it is the role of the government to ensure they have reasons to stay.

(This discussion is beyond the scope of a short article, but young people have even offered governments a roadmap for how to keep them – in the survey, they singled out tackling nepotism as their top priority, something that is altogether within the domain of regional governments to tackle.)

Governments around the world, not merely in the Arab world, are fond of talking about young people as their most precious natural resource. Yet natural resources – whether oil and gas, or abundant land, forests and rivers – require cultivation; their potential usefulness doesn't spring up, fully formed. If young people are losing faith in the direction of their countries, that is due to a lack of sufficient cultivation by those in positions of real power.



# 4

## MY GLOBAL CITIZENSHIP

For the 11th consecutive year, most young Arabs say the UAE is the country they would most like to live in and their own nations to emulate



If 2021 was memorable politically for the normalisation of relations between the UAE and Israel, 2022 has already proved to be moving at an even faster pace when it comes to radical change.

The past 12 months have seen Tunisia appoint its first ever female prime minister, military strikes by Houthi rebels in Yemen against targets in Saudi Arabia and the UAE, the Taliban taking back power in Afghanistan, and the UAE becoming the first Gulf state to open an embassy in Israel. Russia's invasion of Ukraine on February 24 has had a far-reaching impact across many continents.

How has this affected young Arabs? The results suggest that young Arabs are fast changing their opinions, beliefs and allegiances.

The days of the US being the world's policeman and problem-solver when it comes to the Arab world appear over: Arab youths are looking for and finding new friends in new places.

The only constant throughout the region is the admiration for the UAE as a state, and its leadership. For the 11th year running, the UAE is the country most young Arabs – about two-thirds – would like to live in, followed by western nations, the USA, Canada, France and Germany.

The preference for the UAE as the place young Arabs would like to live in is at its highest in the history of the survey, since the question was introduced in 2012. Why? Multiple reasons are cited, with the UAE's growing economy, safety and security, job opportunities and generous salary packages, being the main draws.

The UAE is also the country most young Arabs want their own to emulate with over a third (37%) naming it followed by the US (22%), Canada (18%), Germany (14%) and France and Turkey (at 11% each).

On a wider level, especially in light of the many global political events, we now see changing allegiances.

When asked to choose their nation's allies, China scored highest with 78 per cent, followed by Turkey (77%) and Russia (70%). The UK and France come next (70%) with the US in fifth place (63%). Over the past five years, China has consistently been seen as a stronger ally by young Arabs than the US.

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**The only constant throughout the region is the admiration for the UAE as a state, and its leadership. For the 11th year running, the UAE is the country most young Arabs would like to live in.**

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Yet, over a third of young Arabs (36%) say the US has the most influence in the Arab world, and nearly three-fourths (73%) want to see US disengagement from the Arab world – a sentiment shared by youth across the GCC, North Africa and Levant.

The positive sentiment towards Russia is also reflected in their opinions on the war in Ukraine, with nearly a third (31%) blaming the US and its NATO allies – compared with just 18 per cent blaming Russia. What is clear is the Western deluge of anti-Russian sentiment, and global sanctions against Russia, have done nothing to change the minds of young Arabs.

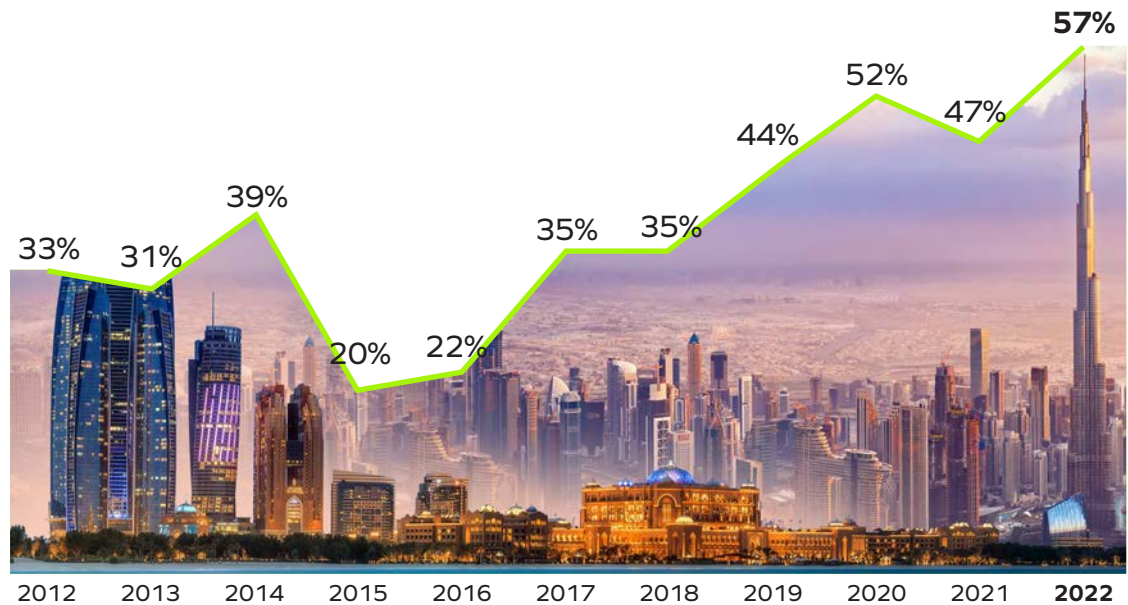
And for the first time, the survey is picking up the strong signs of what could be a major shift in support towards a new triarch of allegiances – China, Russia and Turkey – emerging from the Arab world.



## Nearly two-thirds of young Arabs say the UAE is the country they would most like to live in – a record

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

(Showing percentage, among all, saying 'The UAE')



## Young Arabs view the UAE as the top country to live in for the 11<sup>th</sup> consecutive year, far surpassing other nations

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

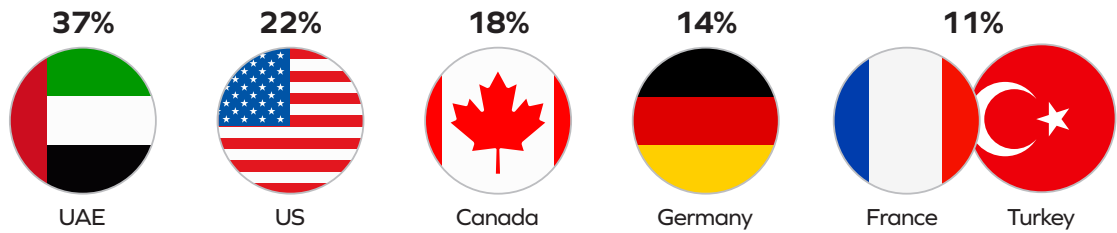
(Showing top five countries)



Top 5 Countries to Live In									
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
France	France	US	US	US	US	Canada	Canada	US	US
US	US	UK	Germany	Germany	KSA	US	US	Canada	Canada
Turkey	Turkey	KSA	Canada	KSA	Canada	KSA	Turkey	UK	France
KSA	KSA	Qatar	Qatar	Canada	Germany	Germany	UK	Germany	Germany

## The UAE is also the country most Arab youth would like their own to emulate

Which country in the world, if any, would you like your own nation to emulate?  
(Showing percentage from among all the top five countries)



Top 5 Countries to Live In									
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
US	France	US	US	US	US	US	US	US	US
France	US	Qatae	Germany	Germany	Canada	Canada	Japan	Germany	Canada
Turkey	Turkey	KSA	Canada	France	Germany	Japan	Turkey	Canada	Germany
China	China	UK	France	UK	KSA	Germany	Canada	Japan	France

## Young Arabs are drawn to the UAE for its growing economy and safe and secure environment

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

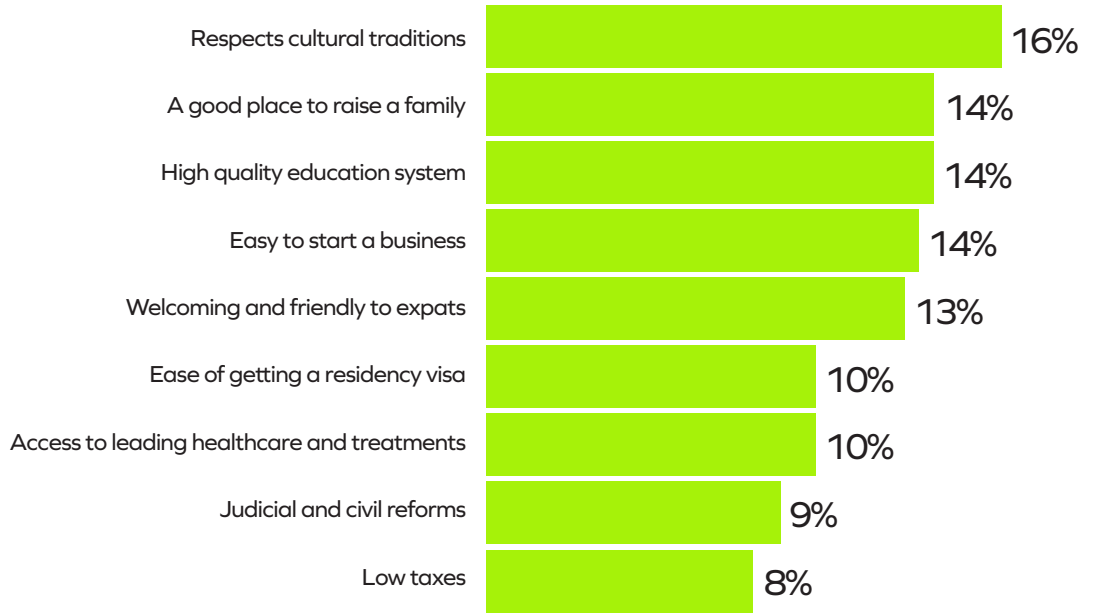
### Top five associations with the UAE





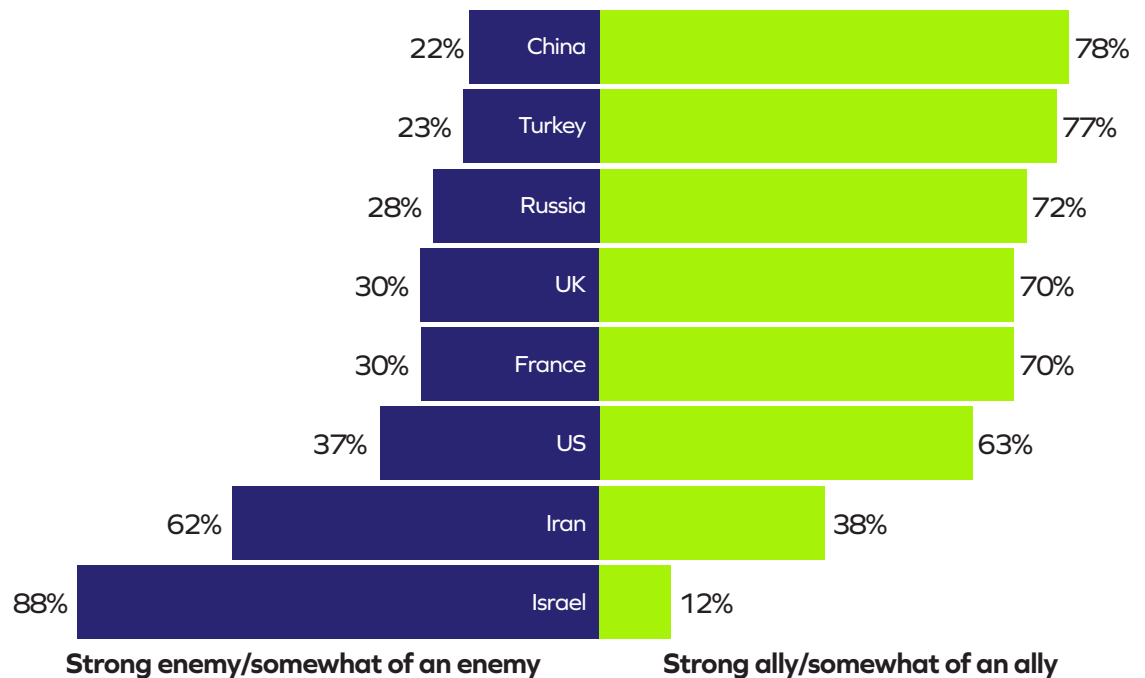
Now thinking specifically about the United Arab Emirates, which of the following phrases, if any, do you associate most strongly with the UAE?

### Other associations with the UAE



### Among non-Arab nations, China is seen by most young Arabs as their nation's ally followed by Turkey and Russia

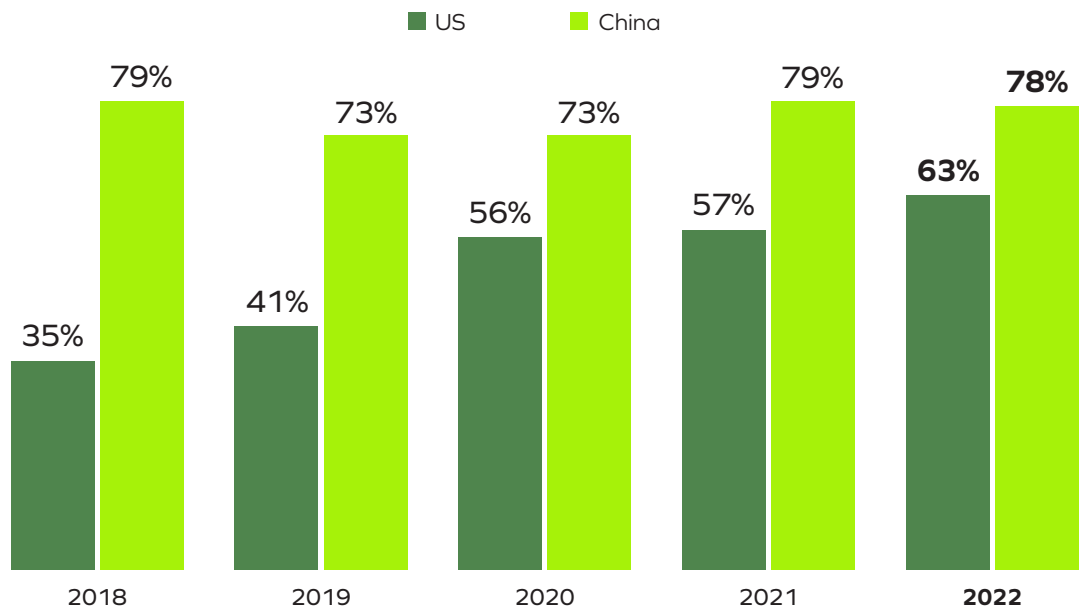
Do you consider (country) an ally or enemy of your country?  
(Showing top five countries)



## In the past five years, China has consistently been seen by young Arabs as a stronger ally of their nation than the US

Do you consider (country) an ally of your country?

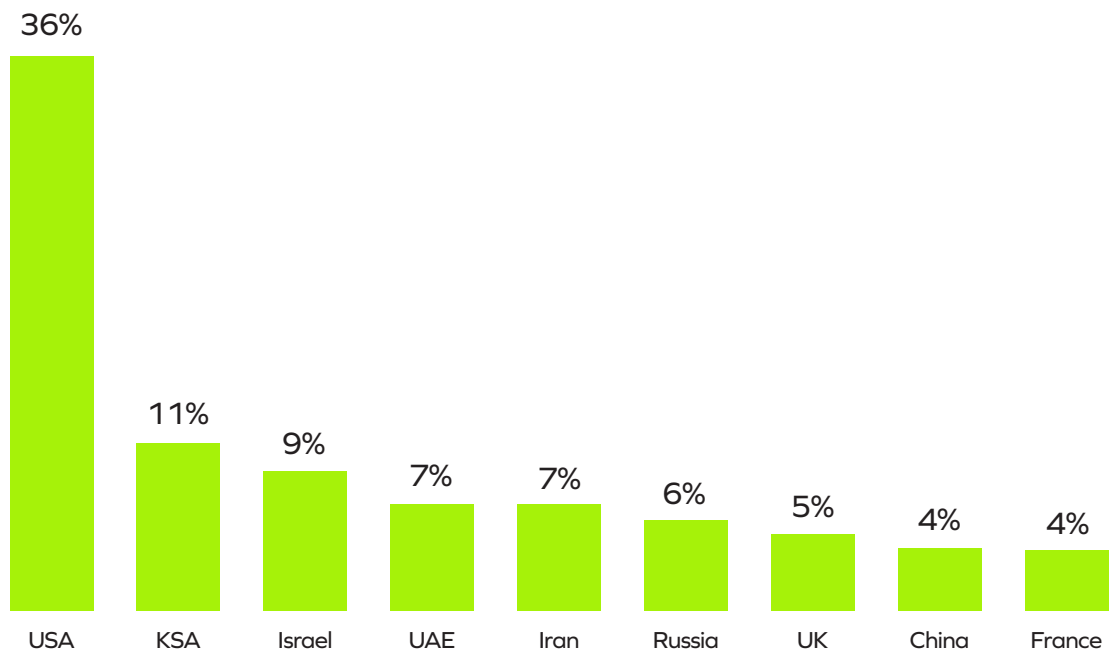
(Showing percentage of youth describing China and the US as a strong ally or somewhat of an ally)



## The US continues to be seen as having the most influence in the Arab world

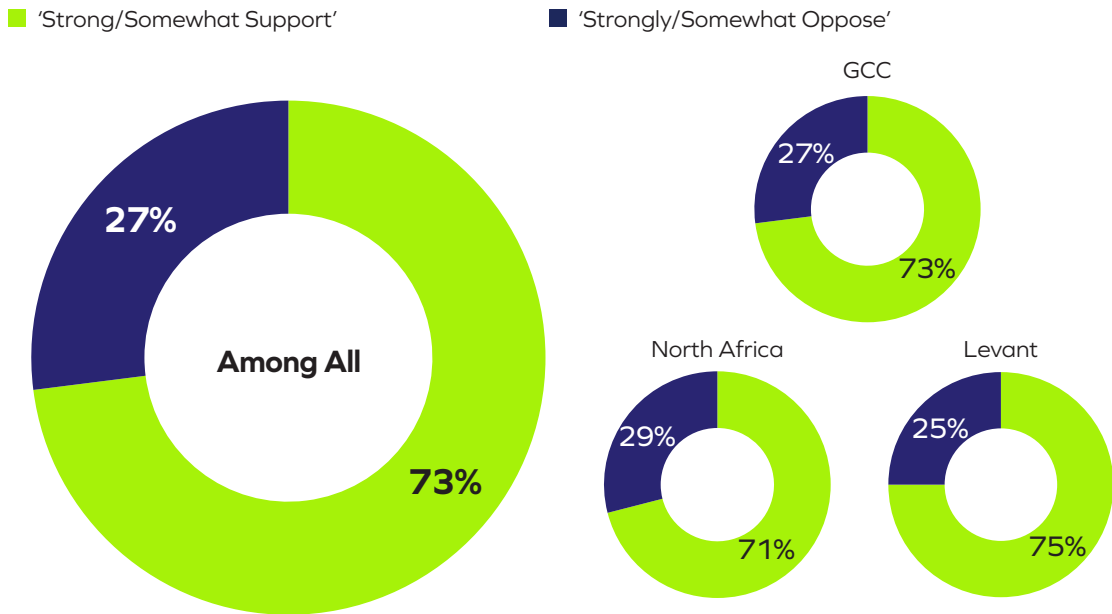
Which of the following countries, if any, has the most influence on the Arab world?

(Showing percentage among all)



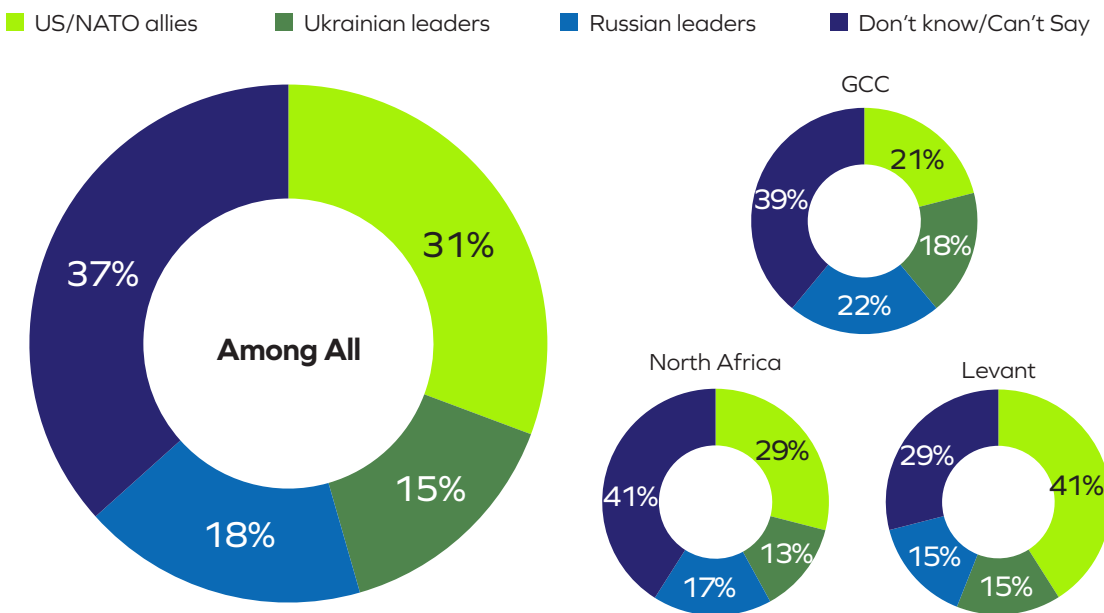
## There is widespread support for US disengagement from the Middle East

How strongly do you support or oppose disengagement of the United States from the Middle East region?



## The US and its NATO allies are seen as more responsible for the Ukraine war than Russia

Who is primarily responsible for the conflict between Russia and Ukraine?  
(Showing percentage among all)



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# The UAE and the Arab world's pragmatic, entrepreneurial generation

Afshin Molavi is the founder and editor of the Emerging World newsletter and 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.



**Afshin Molavi**

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Which country in the world, if any, would you like to live in? It's a simple question and one posed annually as part of the ASDA'A BCW Arab Youth Survey spanning 17 Arab states. Remarkably, for the past 11 years, the answer has been the same: the UAE.

The result is revealing because it is deeply personal. Young survey respondents may have abstract notions about foreign policy or the state of the world, but when it comes to their own life and livelihood, they choose a nation known for its pragmatism, good governance, abundant work opportunities and secure environment.

And, why not? In my own travels across the Arab world and Iran as well as across developing world countries from Asia to Latin America, a perennial theme emerges among young people: a desire for opportunity, a fair playing field and better governance. From Bogota to Beirut, there is a floating thread of anger against corrupt elites, badly managed economies and growing inequalities.

The young Iranians braving their lives on Tehran's streets today are similar to the young Arabs that took part in the Arab uprisings of a decade ago. While their contexts may differ, there is a universal desire for better governance, more freedoms and more opportunities for a better future.

From Cairo to Beirut to Tehran, many young Middle Easterners are calling themselves 'the burnt generation' – burned by years of chronic governmental mismanagement and abuse and years of squandered potential.

Those young people in the Arab world who consider themselves part of 'a burnt generation' are showing remarkable courage and resiliency in demanding a more dignified life. That fight will go on.

Meanwhile, since 2012, the UAE has consistently been the number one destination of choice for a new life among young Arabs. Some years saw the UAE in close competition with France, the US or Canada, but in recent years, the UAE has consistently widened its lead over the field.

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**From Cairo to Beirut to Tehran, many young Arabs are calling themselves 'the burnt generation' – burned by years of chronic governmental mismanagement.**

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This year, 57 per cent of young Arabs said the UAE was their preferred country to live in – a new record. Its closest competitor – the US – received less than half of those votes for the number one slot, coming in at 24 per cent.

So, why choose the UAE? According to the survey results, five issues emerged as to why the UAE seems like an attractive place to live. They noted "a growing economy", "wide range of working opportunities" and "generous salary packages" alongside "a safe and secure environment" and "effective and visionary leadership."



**Across much of the Western world, China has emerged as the key adversary. For young Arabs, however, China has consistently been seen as ‘a better ally’ of their nation than the US. This distinction, however, can be a double-edged sword, particularly in those countries where governments are unpopular, and China is seen as closely linked to unaccountable political elites.**

While some have taken to calling this generation of young Arabs ‘burnt,’ I see them as pragmatic, courageous, entrepreneurial and resourceful – and their choice of the UAE fits many of those attributes.

While the choice of where you would like to live is a deeply personal one, it is also revealing that young Arabs tend to choose places that have something in common: abundant work opportunities, social freedoms and governments that range from effective to reasonably functioning. Troublingly, no other Arab state made the top five. The top five for 2022 are, in order: the UAE, the US, Canada, France and Germany.

Choosing to live in the US, France or Canada, however, does not imply an endorsement of the foreign policies of those countries, as the survey revealed.

When asked: “How strongly do you support or oppose disengagement of the United States in the Middle East region?” some 73 per cent of young Arabs supported this idea. By contrast, leadership across the region has both openly and privately registered fears of US disengagement from the region.

Across much of the Western world, China has emerged as the key adversary. For young Arabs, however, China has consistently been seen as ‘a better ally’ of their nation than the US. This distinction, however, can be a double-edged sword, particularly in those countries where

governments are unpopular, and China is seen as closely linked to unaccountable political elites.

In one of the more remarkable survey findings, many young Arabs are split on who to blame for Russia’s war on Ukraine. More than one-third (37%) of respondents declared that they simply don’t know or can’t say, while 31 per cent across the region blamed the US and NATO allies.

The numbers blaming the US and NATO were significantly higher in the Levant (41%) and North Africa (29%) than in the GCC states (21%).

This result surely reflects the effectiveness of RT’s Arabic broadcasting, Russia’s state-owned channel, and the ineffectiveness of its US and European counterparts.

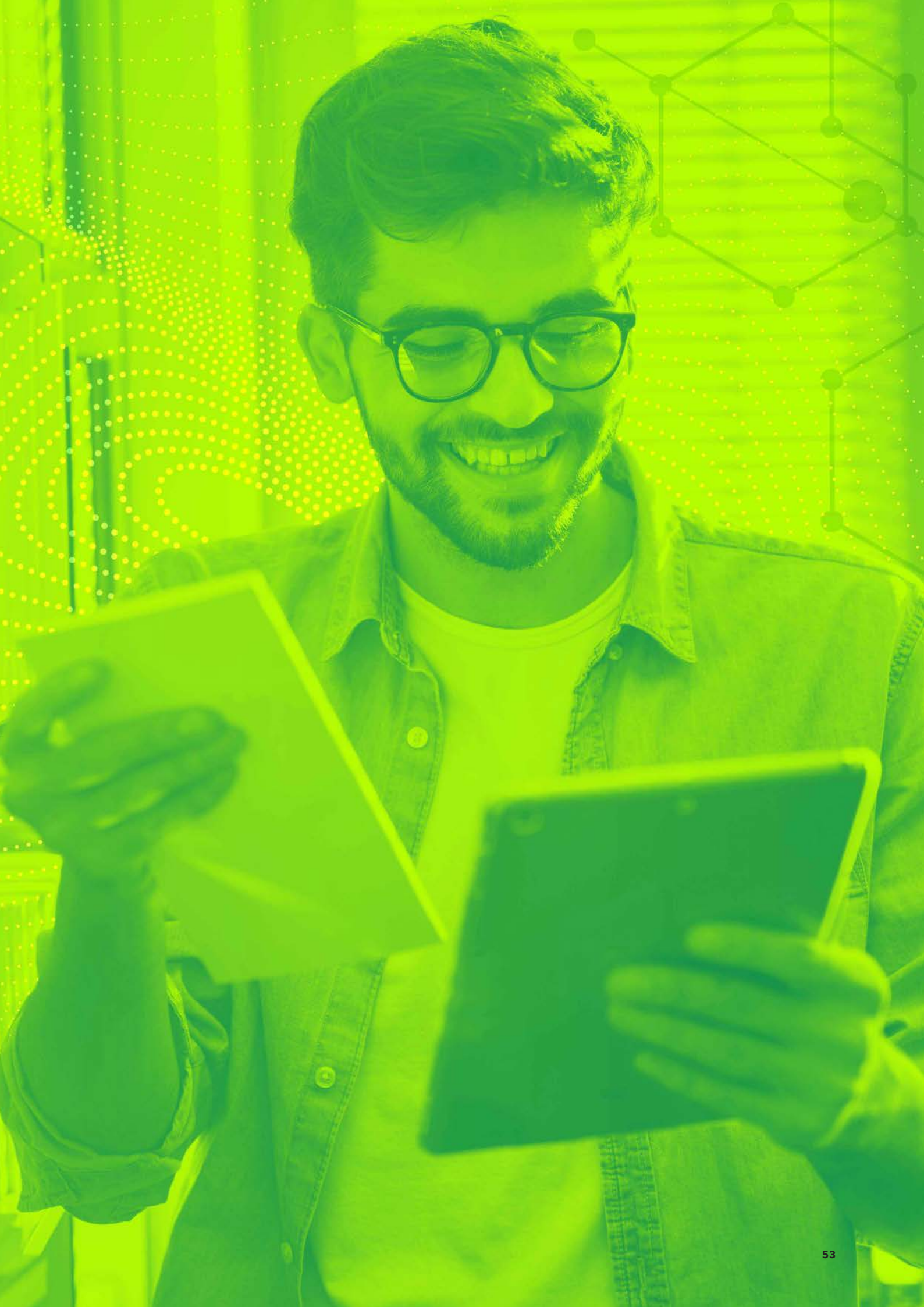
Still, that same young man or woman who may blame the US or NATO allies or see China as a better ally, when given a choice of where to live, is far more likely to choose the US or Canada than Russia or China.

This pragmatic, entrepreneurial generation of young Arabs wants to live in countries that represent the future or at least offer them an opportunity to flourish, not those mired in the past and limiting people rather than empowering them.

# 5

## MY LIFESTYLE

Young Arabs spend more time on social media and struggle to disconnect



The pandemic that struck in 2020 had no respect for borders, religions, cultures or age. The Arab world was hit as hard as anywhere, and even though many GCC countries – particularly the UAE – led the world when it came to vaccinating their population, it wasn't enough to prevent widespread lockdowns, disruptions and job losses.

Two years on, the effects are still being felt. One result of this has been an even greater rise in social media use. In many GCC countries, internet penetration is between 98% and 100%, and well over 65% in the Levant and North Africa.

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### **The results show that young Arabs have the same interests and lifestyle habits and patterns as their counterparts in the West.**

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Despite some conflict affected areas such as Libya, Sudan, Yemen and Syria skewing the figures, the latest World Bank report shows 69 per cent of all Arabs are online, while 97 per cent have a mobile cellular subscription.

This means young Arabs are now on the internet in record numbers, for social media, news, ecommerce and streaming services, as reflected by the survey results.

Arab youth are hooked on social media more than ever. WhatsApp, Facebook, Instagram and YouTube are the most widely used platforms, though there is a significant rise in the use of TikTok – accompanied by a steady fall in the popularity of Twitter. LinkedIn is the least popular.

With so many options, 76 per cent find it hard to disconnect from social media, that figure rising to 83 per cent in the GCC.

Social media remains the biggest news source at 65 per cent, but notably, television is seen as the most trustworthy source of news. Social media is only in fourth place, behind newspapers and online news portals.

Also significant this year is the growth of ecommerce. Globally this is now a US\$9 trillion market, rising at four times the rate of the retail sector.

While the number of young Arabs who shop online has doubled in the past five years, just under half of all young Arabs are now shopping online on a monthly basis, especially for food and groceries.

But despite the growth of online purchases, over two-thirds still prefer to pay for their goods in cash.

Their surroundings may be different and ever changing, but primarily, the results show that young Arabs have the same interests and lifestyle habits and patterns as their counterparts in the West.

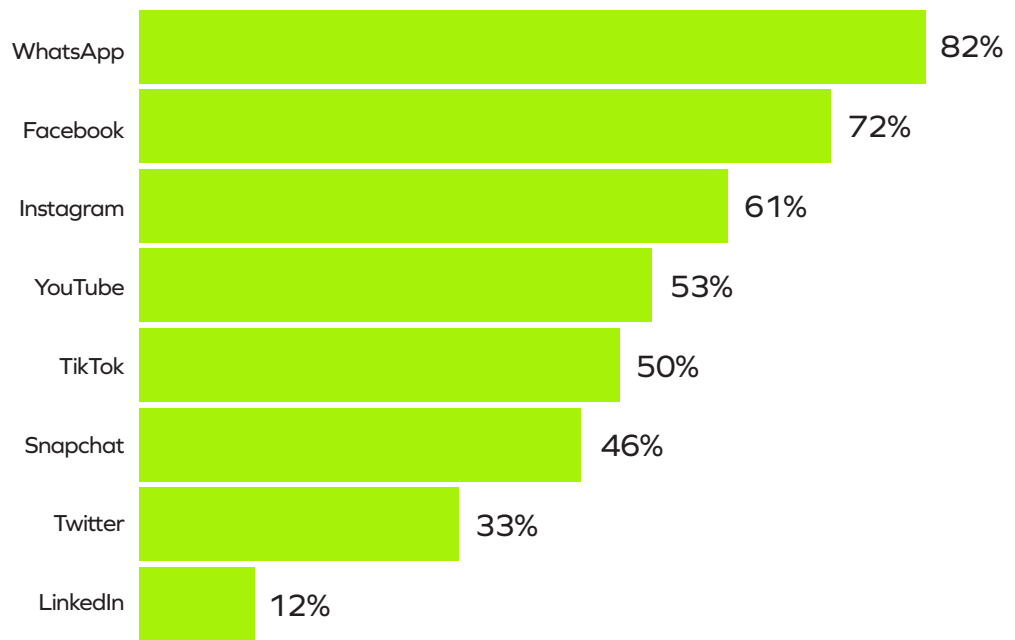




## WhatsApp, Facebook, Instagram and YouTube are the most commonly used social media platforms

How often do you visit or use each of the following?

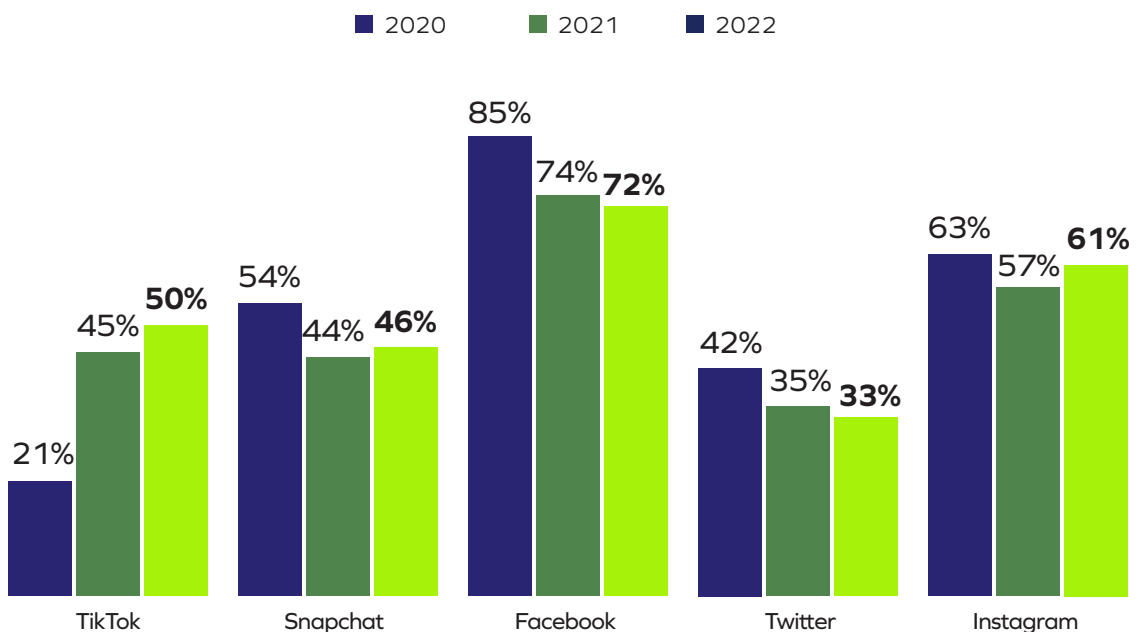
(Showing percentage who use each daily)



## Use of TikTok more than doubled in three years while that of Facebook and Twitter declined

How often do you visit or use each of the following?

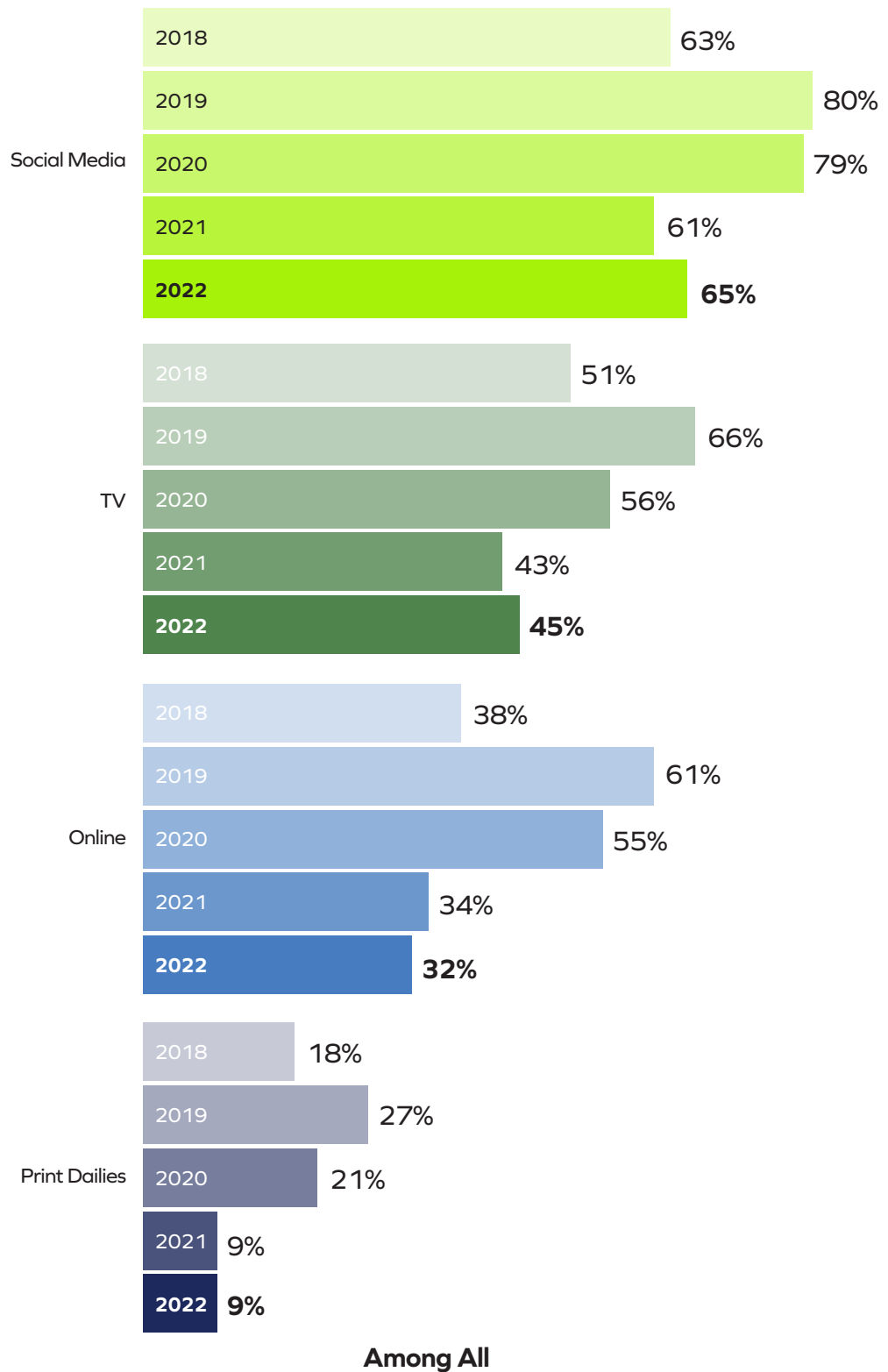
(Showing percentage who use each daily)



## News consumption is declining with social media being the most important source of news

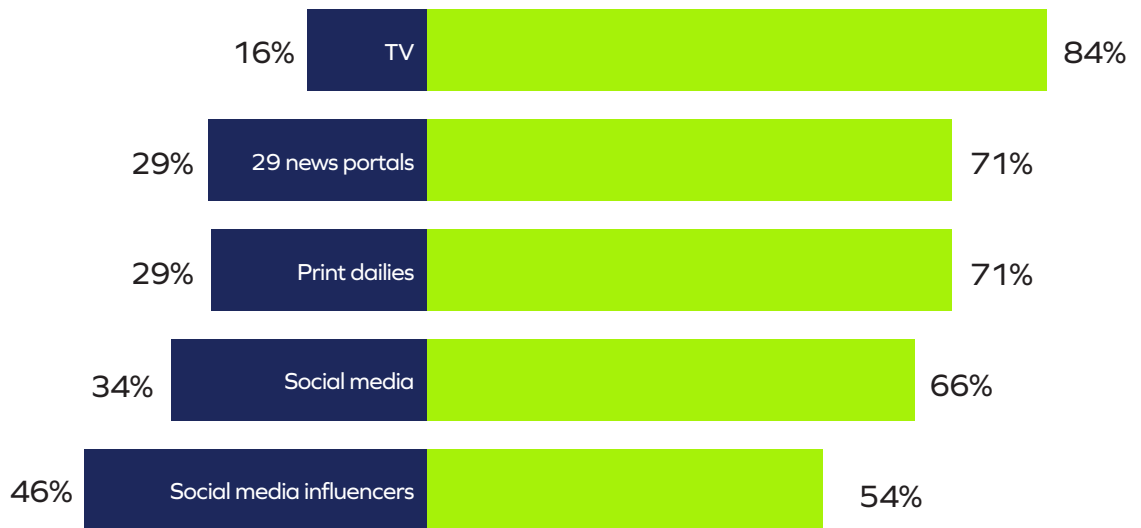
Where do you get your news?

(Showing percentage among all)



## TV, newspapers and online portals are seen as more trustworthy than social media or influencers

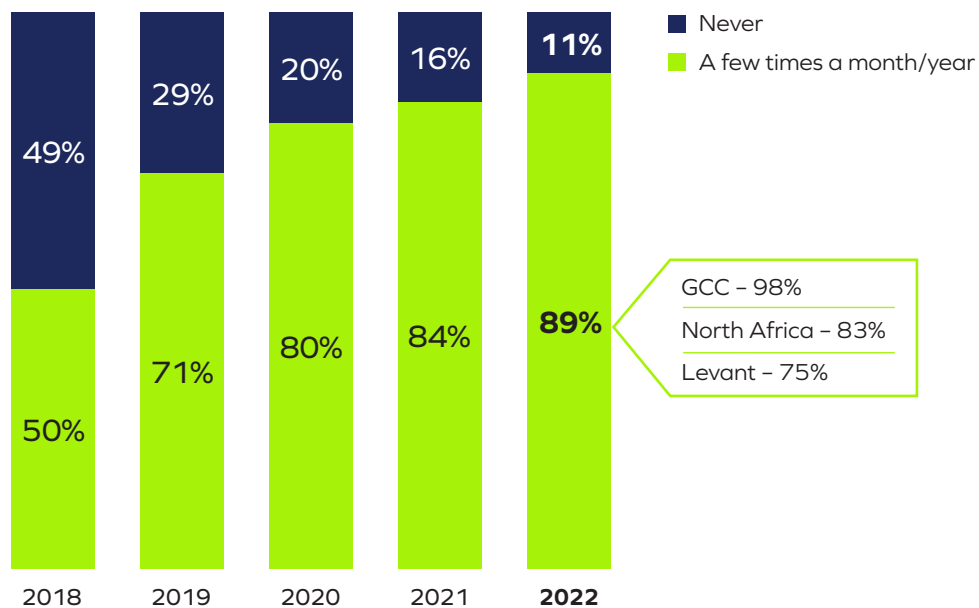
How trustworthy do you think each of the following is as a source of news?  
(Showing percentage among all)



Among All

## The number of young Arabs shopping online has nearly doubled in five years

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

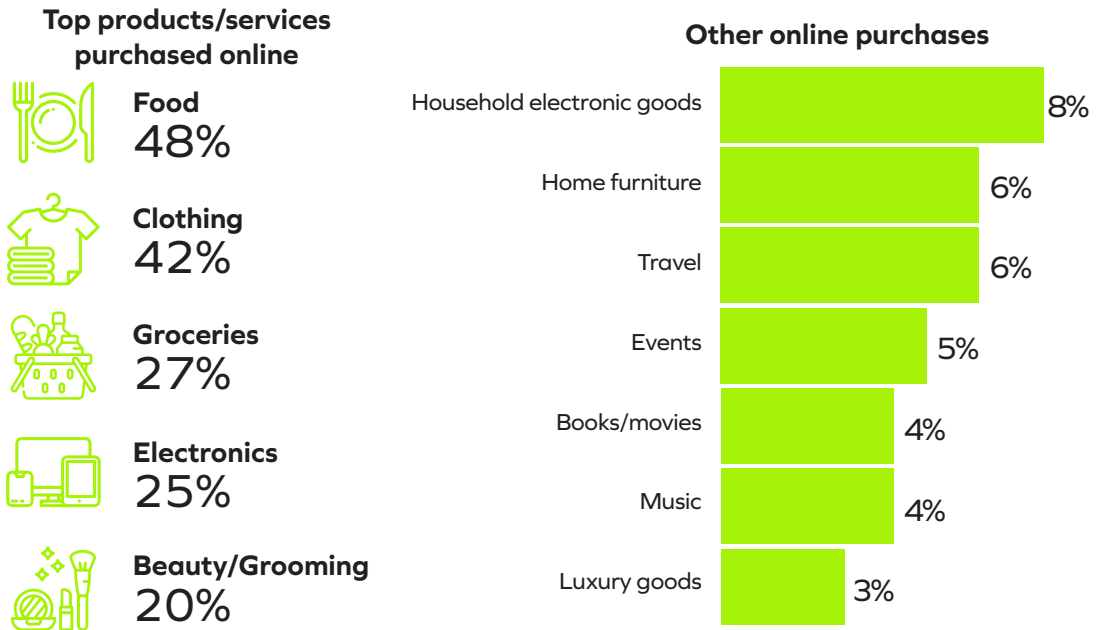


(Not including, 'Don't know')

## Youth are most likely to buy food, clothing, groceries and electronics online

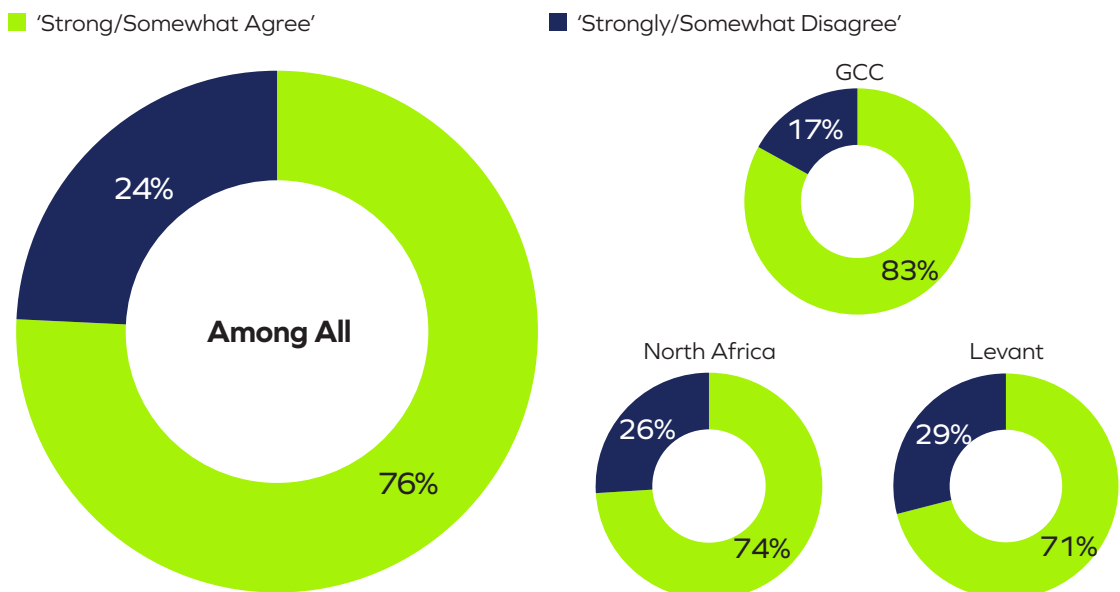
Which of the following products or services, if any, have you purchased online in the past year?

(Showing percentage among all)



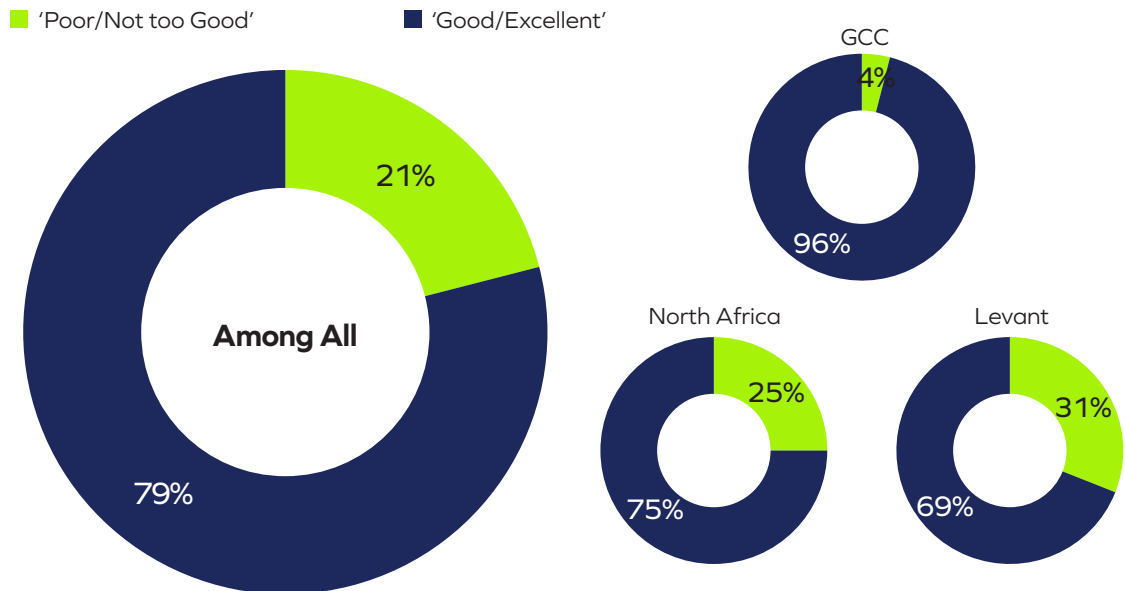
## Three-quarters of youth say they struggle to disconnect from social media

Do you agree or disagree with the statement that "I often find it difficult to disconnect from social media"?



## One in five young Arabs, especially in North Africa and the Levant, describe their mental health as 'poor or not too good'

In general, how would you rate your current mental health and well-being?



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# Embrace transparency to build trust in social media

Iain Akerman is a writer, journalist and editor based between Dubai and Beirut. He writes for newspapers and magazines across the Middle East and Europe, including Arab News and Wired. He is the Founder and Director of Discontent, a company that specialises in the production of independent magazines and short-form documentaries. He was previously Contributing Editor of Campaign Middle East, having served as the magazine's editor for six years.



Iain Akerman

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One in five young Arabs, especially those in the Levant and North Africa, describe their mental health as 'poor or not too good'. Let that sink in for a moment. Although the reasons behind this figure are not discussed, regional conflict, the climate crisis, the pandemic and financial insecurity will all play their part. So, too, will social media.

When The Wall Street Journal published 'The Facebook Files' in September last year, those files included claims that the company knew that Instagram was 'toxic' for many teenage girls and had consistently played down the app's negative effects. Facebook's own internal research revealed a significant teen mental health issue, with 32 per cent of teenage girls saying they felt bad about their bodies. Rather than provide comfort, Instagram only made them feel worse.

Although steps have been taken to address these issues by the platforms themselves, and by influencers keen to strip away the veneer of perfection, they only act to confirm what we've known or believed for years – that heavy use of social media leads to increased risk of anxiety, loneliness and depression. Most at risk are girls and young women, including those in the Arab world, although the social stigma associated with mental health is a barrier to open discussion and in all likelihood impacts statistical reliability.

The fact that young Arabs are struggling to detach themselves from the platforms that can cause such distress makes this all the more worrying. According to the 14th ASDAA BCW Arab Youth Survey, three-quarters of respondents (76%) either strongly agree or somewhat agree with the statement that they find it difficult to disconnect from social media. This rises to 83 per cent in the GCC, with young people all but consumed by their mobile phones. This has not only transformed the way they purchase goods (the number of young Arabs shopping online has nearly doubled in five years), but how they absorb news of the world around

them. News that in and of itself is depressing, sometimes overwhelmingly so.

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**A report on Meta's policies and activities during the 'May 2021 crisis in Israel and Palestine' found that the actions "appear to have had an adverse human rights impact on the rights of Palestinian users to freedom of expression".**

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That news is largely consumed via social media (up 4% to 65% in 2022), followed by TV and online news portals. It is TV, however, that is the most trusted source of information (84%), compared with two-thirds (66%) of respondents who describe social media as a trustworthy source of news.

Such a low level of trustworthiness is to be expected, particularly in the Arab world. In April this year, the model Bella Hadid claimed Instagram was shadow banning stories related to the Palestinian Territories, highlighting what many said was the continued silencing of Palestinian voices.

This is by no means a new phenomenon. In 2021, Instagram was accused of censoring pro-Palestinian content during demonstrations in East Jerusalem's Sheikh Jarrah. These accusations intensified following the storming of the Al-Aqsa Mosque and Israel's attack on Gaza.

Although the existence of shadow banning is disputed, a report on Meta's policies and activities during the 'May 2021 crisis in Israel and Palestine' found that the actions of Facebook's parent company "appear to have had an adverse human rights impact on the rights of Palestinian users to freedom of expression, freedom of assembly, political participation, and non-discrimination, and



**Misinformation and deceit have hampered the influencer market, particularly in the GCC, where influencers have consistently failed to disclose branded content or brand partners. Only when transparency is embraced is that likely to change, although the chances of that occurring remain slim.**

therefore on the ability of Palestinians to share information and insights about their experiences as they occurred”.

The report, which was produced by the independent consulting firm Business for Social Responsibility for Meta, also found that Arabic content suffered greater over-enforcement (the erroneous removal of Palestinian voices). This not only applied to Palestinians in the West Bank, Gaza and Israel, but to all those in the diaspora, as well as their allies. A lack of oversight also allowed content policy errors, including the adding of #AlAqsa to a hashtag block list.

All of which has degraded confidence in both Instagram and Facebook, with a deep apprehension and suspicion remaining. This is made all the more painful by the knowledge that Instagram is a powerful tool for independent voices.

In Lebanon, it helped citizens to mobilise during the protests that swept the country in late 2019 and early 2020, enhanced awareness of political corruption, placed a spotlight on police violence, and helped to facilitate the rise of independent media platforms such as Megaphone News. In that sense, the need for independent news outlets remains high, with mainstream media failing to adequately represent the region’s youth, just as the shadow of censorship and political bias looms large.

Suspicion of Facebook and Instagram, as well as a demographic shift away from what is perceived

to be a dated platform (in the case of Facebook), may help to explain changes in social media usage.

As the ASDA’A BCW Arab Youth Survey notes, the use of TikTok has more than doubled in the past three years, while that of Facebook and Twitter (which has been racked by its own issues of hate speech, harassment, fake accounts, foreign meddling and bias) has declined. This mirrors findings elsewhere in the world.

In August, a Pew Research Center survey of American teenagers aged between 13 and 17 found that TikTok had dramatically increased in popularity, with 67% saying they had used the platform. In contrast, Facebook had plummeted from 71% of teens saying they had used the platform in 2014/15 to just 32% in 2022.

TikTok’s popularity in the Middle East has grown significantly, particularly in the UAE and Saudi Arabia, where an increasing number of influencers have prioritised the platform. Interestingly, influencers are the least trusted as a source of news according to the ASDA’A BCW Arab Youth Survey, and perhaps understandably so.

Misinformation and deceit have hampered the influencer market, particularly in the GCC, where influencers have consistently failed to disclose branded content or brand partners. Only when transparency is embraced is that likely to change, although the chances of that occurring remain slim.

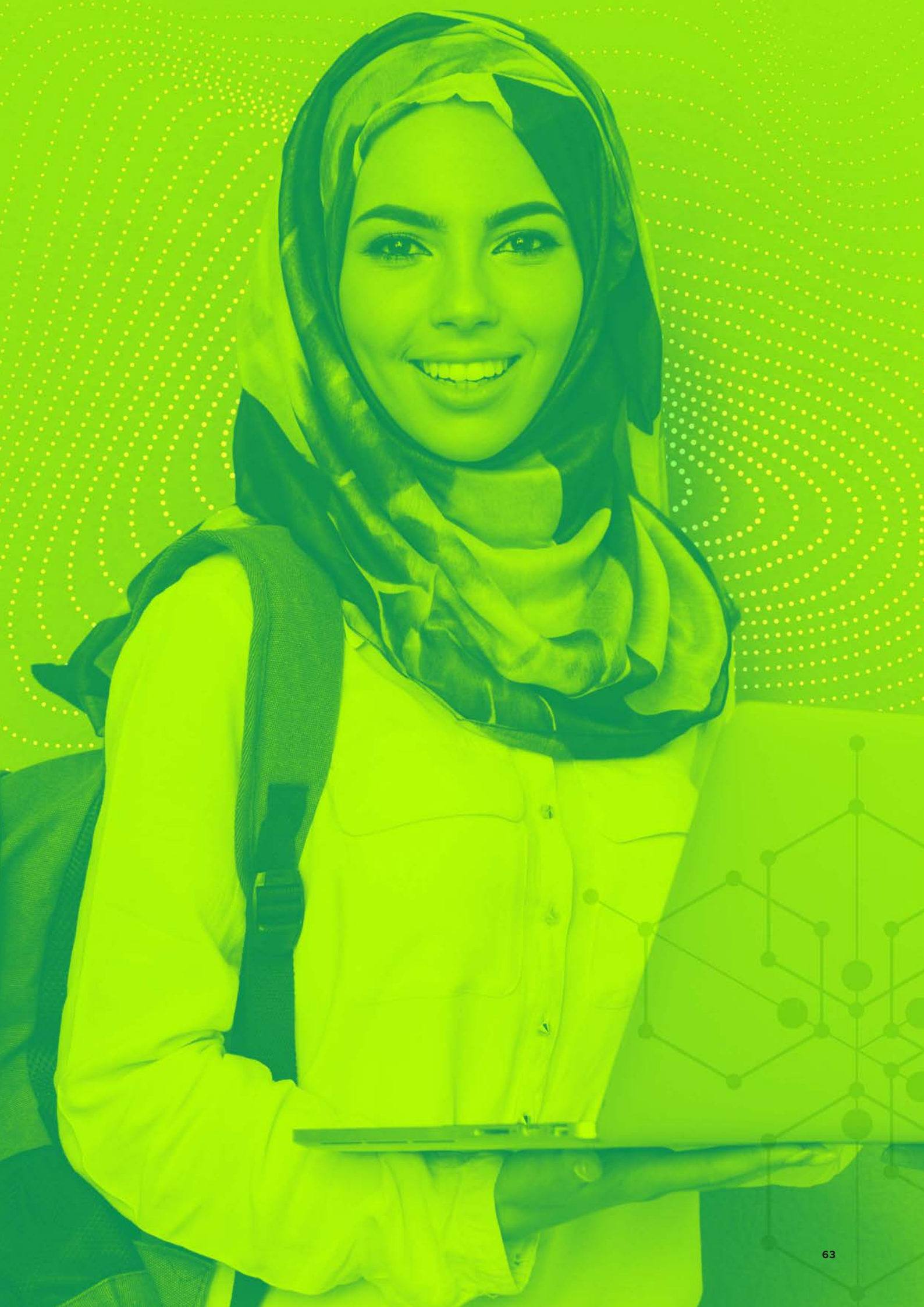


# 6

## MY ASPIRATIONS

The majority of Arab youth are optimistic of better days but many fear their national economies are headed in the wrong direction, with nearly half considering emigration





The battle between optimism and pessimism is most stark when the aspirations of young Arabs are more closely examined. The last 12 months have seen huge changes within societies, particularly in the UAE and Saudi Arabia.

The UAE enacted the largest legal reforms ever seen in the country, including permitting 100 per cent foreign ownership for companies outside freezones, enhanced digital infrastructure laws, and significant legal reforms – all boosting the country’s reputation as a nation with a liberal and modern outlook.

Even across the border in the more conservative Saudi Arabia, reform has continued. There are music, film and art events that would have been completely off limits just three years ago as well as an increasing number of opportunities for women and reforms to corporate laws, including raising the rate of VAT.

But where do the youth fit into all this? Do they support such changes? Do they support their leaders? Once again, they appear to be at a crossroads, looking in several directions at the same time.

By nature, Arabs are an optimistic people – and the results show this again, with two-thirds believing that their best days lie ahead. This figure rises to 87 per cent in the GCC.

And more than half (54%) are sure they will have a better life than their parents, although this number falls to just 37 per cent in the Levant. For all this optimism, confidence that their economies are moving in the right direction now stands at just 46 per cent, down from 53 per cent five years ago. In the Levant, the figure is just 16 per cent.

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**By nature, Arabs are an optimistic people – and the results show this again, with two-thirds believing that their best days lie ahead.**

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Significantly though, when it comes to their priorities over the next 10 years, emigrating to a new country is now ranked third. Nearly half (45%) are actively looking to emigrate, and of those looking to leave, the top destinations are Canada, Germany and the US, followed by the UAE and France.

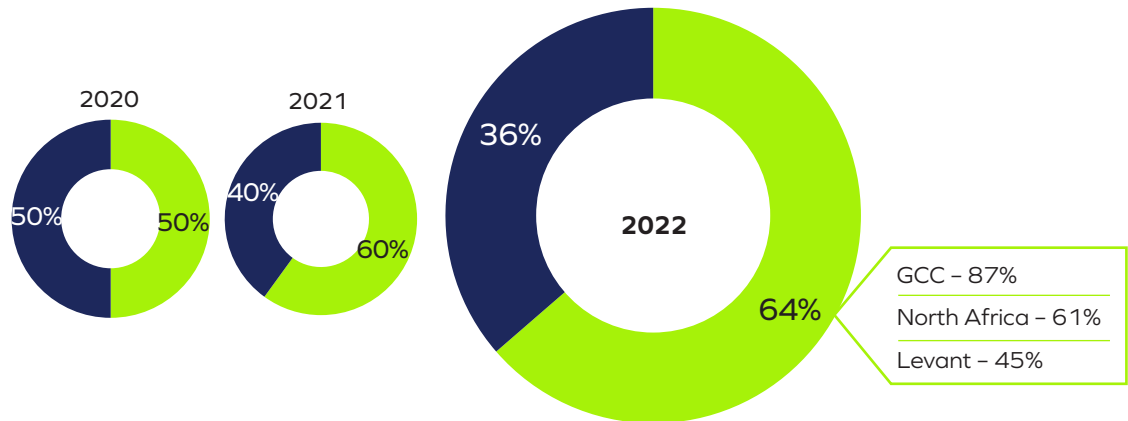
The results again pick up the early signs of what could be an extremely significant factor in the long-term prospects for the region: yes, they remain optimistic, but they are now actively considering whether their future lies outside the Arab world.



## Over two-thirds of young Arabs believe their best days lie ahead; youth in GCC are most optimistic

Which of the following do you agree with?

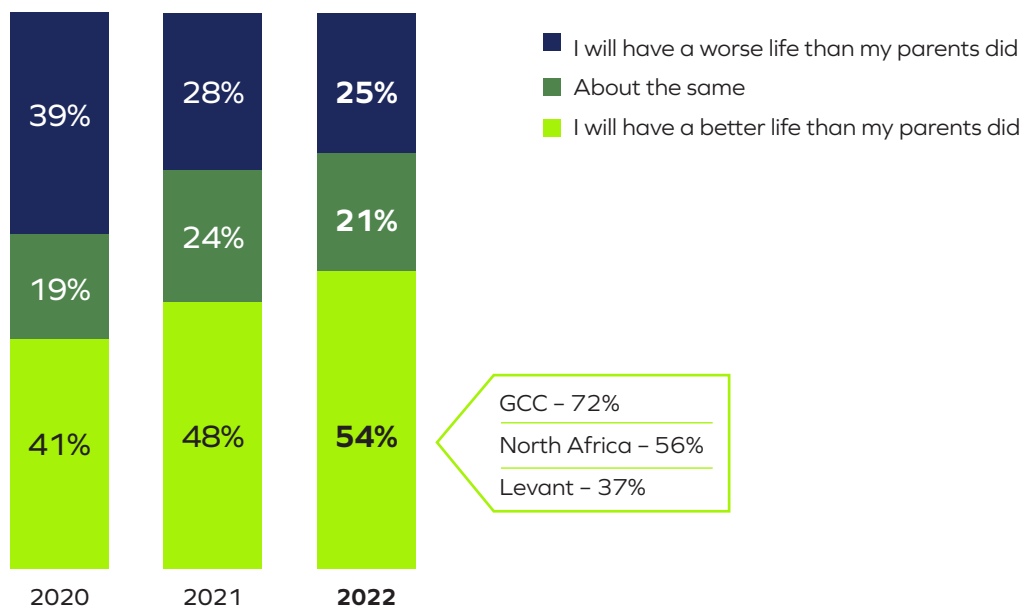
(Showing % saying "Our best days are ahead of us")



## Over half say they will have a better life than their parents, the highest level of optimism in three years

Which of the following is closer to your view?

(Showing percentage among all)

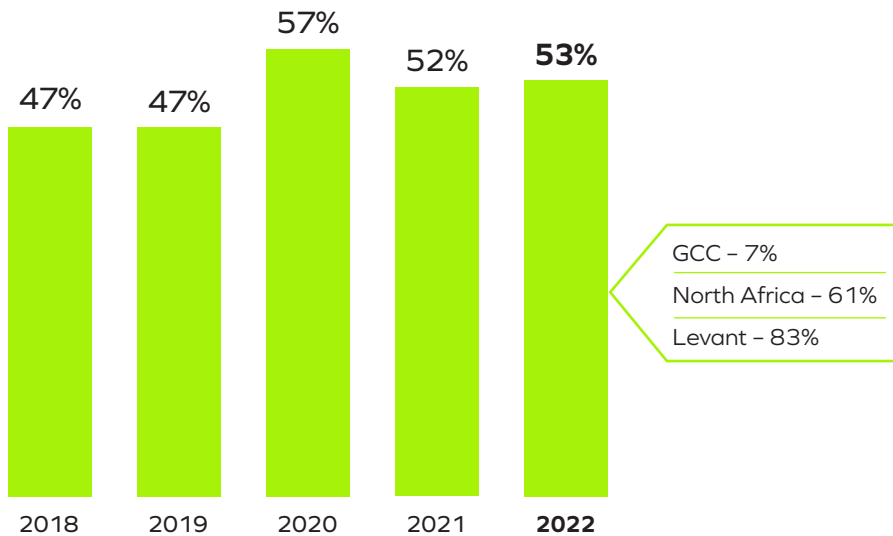


(Not including 'Don't know')

## Over half say their national economies are going in the wrong direction

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

(Showing percentage saying 'Wrong direction')



(Not including 'Don't know')

## Young Arabs are most looking forward to finishing education and finding jobs but emigration is top of mind among many

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

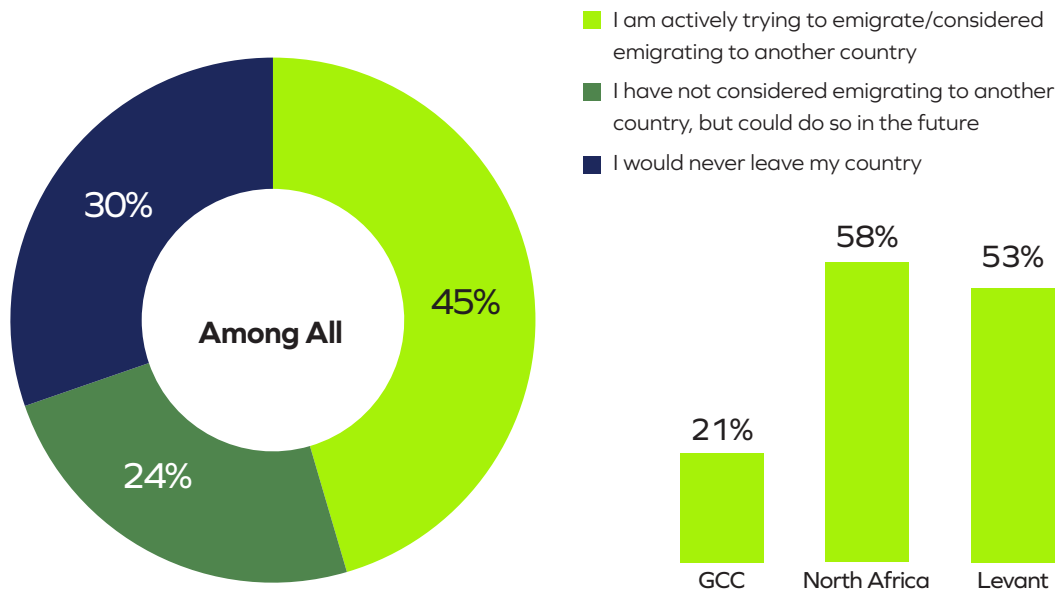
(Showing percentage among all)



## Nearly half of young Arabs are actively trying to or considering emigrating to another country

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

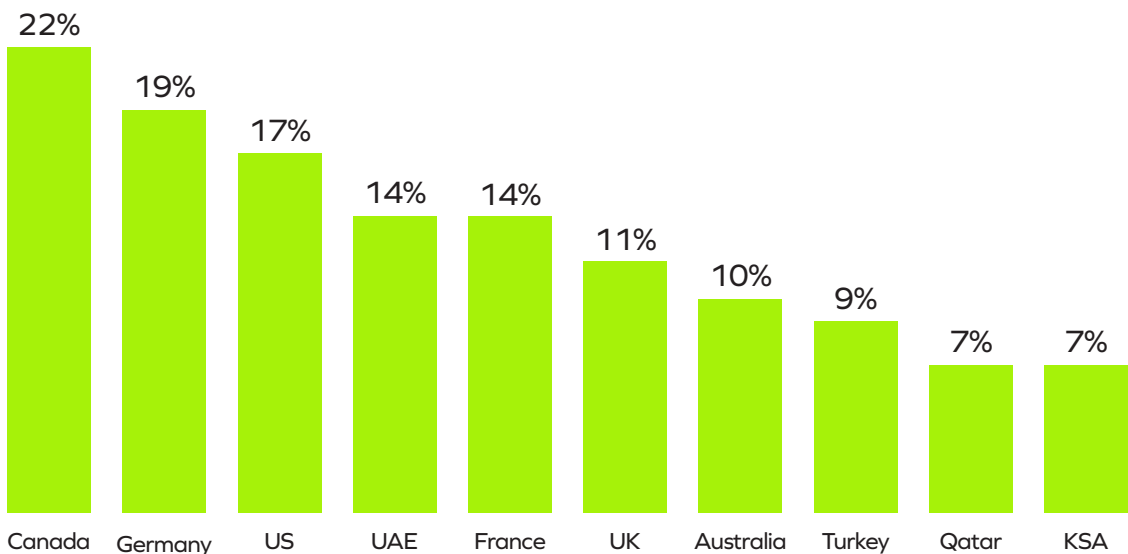
(Showing percentage saying)



## Canada, Germany and the United States are the most popular destinations for prospective emigrants

If you were to emigrate to another country, which country in the world would you be most likely to move to?

(Showing top 10, among those wishing to emigrate)



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# Emigration presents a 'red flag' to MENA governments

Chaker Khazaal is an award-winning Palestinian-Canadian author, reporter, public speaker, and Chairman of New York based firm, OBCIDO Inc. Born in 1987 as a Palestinian refugee in Lebanon, Khazaal grew up in the Bourj el Barajneh camp in Beirut. He later emigrated to Canada. As one of four recipients of the Global Leader of Tomorrow Award in 2005, he studied at York University in Toronto, graduating in 2009 with a BA in international development studies. Khazaal, an advocate for refugees and aspiring young writers, is a strong, engaging and savvy communicator. He has published five novels, two of which – Tale of Tala and Ouch! – were on Amazon's best sellers list. He was named Esquire's Middle East Man of the Year 2015, and in 2016, Khazaal was ranked first by Arabian Business Magazine in the 100 Most Powerful Arabs Under 40. In the same year, he was presented with the Mentor Arabia Award by Queen Silvia of Sweden and Prince Turki Bin Talal Bin Abdulaziz Al Saud. In December 2017, Khazaal was awarded the Global Trailblazer, together with Arianna Huffington by New York-based NGO Bridges of Understanding. He is currently writing his sixth novel titled Arikaz.



**Chaker Khazaal**

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For the 14th year in a row, ASDA'A BCW has fanned out across the MENA region to gather information for its insightful Arab Youth Survey. One of the primary goals of the survey was to identify and quantify specific markers related to the hopes, fears, and aspirations of over 200 million Arab youth across the MENA region.

This year's survey, aptly titled 'Charting a New Course,' reveals a generation that, despite ongoing regional turmoil, conflicts, a global pandemic, and struggling economies, is willing to partner with their governments to bring about positive change – if provided the economic infrastructure and political stability to do so.

Holistically, the so-called 'Arab Spring generation' is optimistic about its future. A total of 64 per cent of Arab youth agree that their best days lie ahead, and 54 per cent say they are better off than their parents.

Upon closer examination, however, 53 per cent of Arab youth think their economies are headed in the wrong direction, and 45 per cent are considering emigrating to another country. The latter is the third most popular aspiration behind finishing their education and starting a professional career.

The picture starts to look very different if we zoom in on each sub-region. The levels of optimism in the GCC and North Africa are high – 87 per cent and 61 per cent, respectively. However, we see a dip to 45 per cent in the Levant. Moreover, the youth perception of local economies is split by sub-region, with only 7 per cent of the youth in the GCC seeing their economy headed in the wrong direction. In comparison, that number climbs to 61

per cent in North Africa and a massive 83 per cent in the Levant. Economic performance appears to be directly correlated with optimism and positive aspirations among youth. Like much of the world, the COVID-19 pandemic hit the MENA region hard, causing a regional economic shift that most countries are still recovering from.

According to reports, real incomes are 5 per cent lower than in 2020, and an alarming 192 million people are living below the poverty line. While the GCC has bounced back from the economic upheaval caused by the pandemic, other countries like Lebanon have witnessed a severe economic decline.

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**Without critical economic reforms that can support and foster opportunities for youth, we will continue to see an alarmingly large number of young people seeking opportunities abroad.**

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Outside of the GCC, we see other factors, such as conflict and political turmoil, preventing the economic growth needed to recover economically. One consequence is increased rates of emigration, particularly from the Levant and North Africa to destinations such as the US, Canada, Germany, and the UAE. Arab youth are looking for 'greener grass' where they can progress and not only survive.



**Economic growth can create the stability needed to build infrastructure for educational and vocational opportunities for young people. The more opportunities, the more we can decrease the amount of emigration, empowering Arab youth to stay and actively contribute to regional development.**

Youth in the GCC show significantly lower numbers of emigration and concern about the future, most likely due to economic growth and the number of local and regional youth initiatives developed over the past decade. The UAE is an excellent example of a country actively investing in its youth population.

In 2016, His Highness Sheikh Mohammed bin Rashid Al Maktoum, UAE Vice President and Prime Minister and Ruler of Dubai, created the Minister of State for Youth Affairs position, specifically dedicated to developing and maintaining programmes and initiatives for youth empowerment.

In 2017, the UAE launched the Arab Youth Centre to foster innovation and creativity in youth across the region. The following year the country launched the Federal Youth Authority. This startup connects young people directly to their government under the slogan 'Done by Youth, For Youth and With Youth'.

Meanwhile, the Levant is facing unprecedented levels of emigration. All countries in the Levant have deteriorating economic conditions, ongoing conflicts, social tension, and a concerning lack of infrastructure to support youth. Lebanon, in particular, is going through one of the worst economic crises in human history, exacerbated by the devastating Beirut Port explosion, COVID-19 lockdowns, widespread political corruption, the devaluation of the currency, and deeply ingrained sectarian divisions. It is not shocking that Lebanese youth are looking for opportunities elsewhere.

In North Africa, we see a contrast between high levels of optimism about the future with very high levels of emigration, the highest out of the three sub-regions.

Many countries in North Africa are still dealing with the repercussions of the Arab Spring uprisings and subsequent political upheaval, which could be driving high emigration rates.

At the same time, economic reforms promise new investments in the region. Egypt's economy, for example, is on track to grow 5.5 per cent in the fiscal year 2021/2022, spurred on by a focus on exports and investments. The Egyptian government is working to create jobs, improve the quality of life, and provide structural reforms for the private sector. It remains to be seen whether those reforms will reduce the emigration rate in the coming years.

Without critical economic reforms that can support and foster opportunities for youth, we will continue to see an alarmingly large number of young people seeking opportunities abroad. Losing the top tier of educated youth leaves countries without a promising generation to bring about necessary changes.

Economic growth can create the stability needed to build infrastructure for educational and vocational opportunities for young people. The more opportunities, the more we can decrease the amount of emigration, empowering Arab youth to stay and actively contribute to regional development.

Moreover, good economies attract educated youth and benefit from their skills and knowledge to grow further. It is a cycle of growth that MENA countries outside of the GCC should begin to cultivate. The alternative could mean further political and economic decline.

## Social, economic and social media indicators 2022

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: World Population Review
- GDP: International Monetary Fund; Trading Economics; Palestinian Monetary Authority
- Share of oil in GDP: Bahrain Economic Quarterly Q1 2020 by Ministry of Finance and National Economy; Saudi Arabia's General Authority for Statistics; UAE Ministry of Economy - Annual Economic Report; Iraq Economic Monitor by World Bank Group; OPEC
- Youth unemployment: World Bank; Palestinian Central Bureau of Statistics
- Internet users & penetration; social media users and mobile usage: Internet World Statistics; Data Reportal



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## About us



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ASDA'A was founded in 2000 as an independent communications firm by Sunil John, who leads the agency in its 22nd year. In 2008, WPP (NYSE: WPP) acquired a majority stake in ASDA'A and merged it with BCW, one of the world's top three communications firms. The agency has a team of over 160 professionals across its seven wholly owned offices. With an additional 11 affiliates, ASDA'A BCW covers 16 countries across the Middle East and North Africa. The agency serves over 100 retained clients and is the leading PR consultancy in the MENA market.

[www.asdaa-bcw.com](http://www.asdaa-bcw.com)



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BCW is the global communications agency that moves people on behalf of clients. 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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