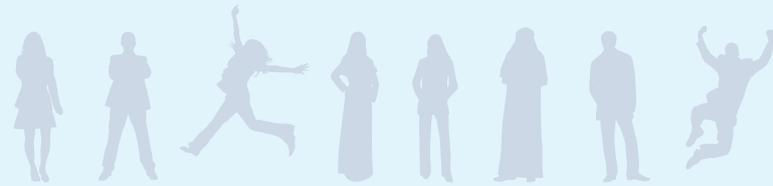
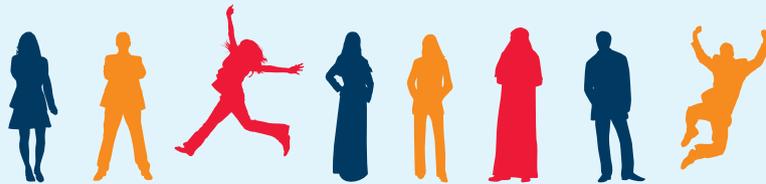


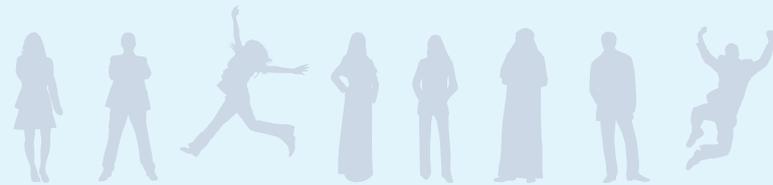
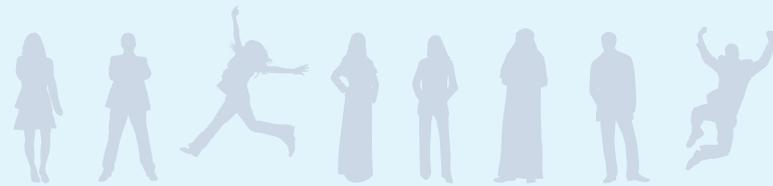
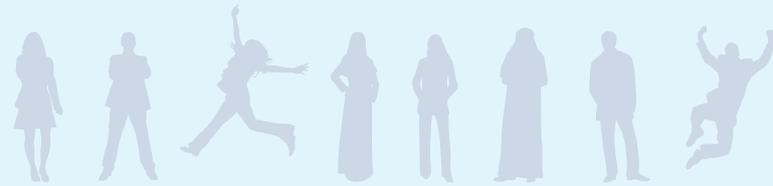
After the Spring



ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2012



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**After the Spring: A White Paper on the Findings of the
ASDA'A Burson-Marsteller Arab Youth Survey 2012**

Published in 2012 by ASDA'A Burson-Marsteller

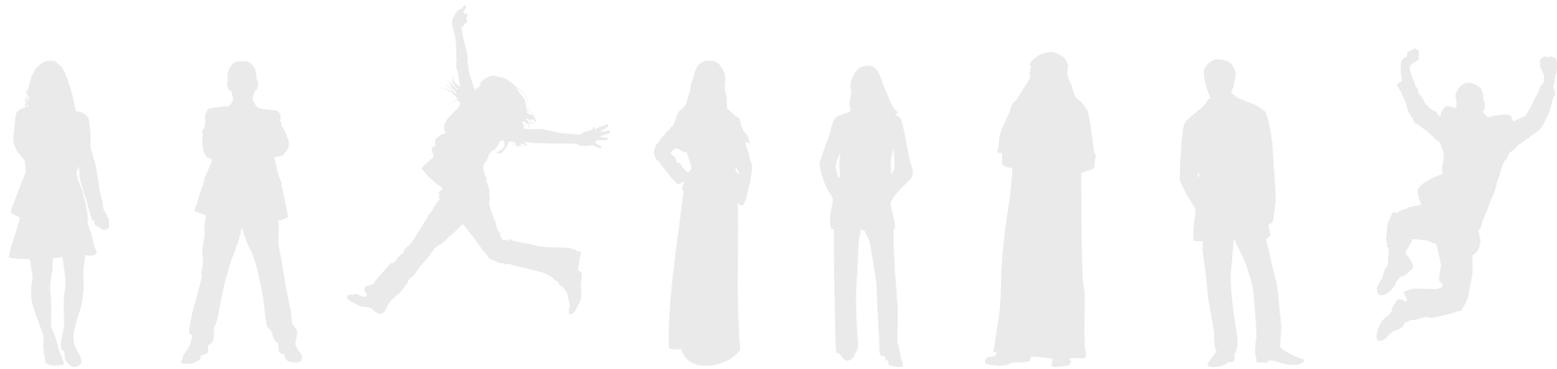
This White Paper can be obtained from the ASDA'A Burson-Marsteller Arab Youth Survey website: **www.arabyouthsurvey.com**

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AFTER THE SPRING



“

Young people, everywhere, are a source of energy and ideas. They are our innovators, our entrepreneurs and, usually, our greatest optimists.

”

Dear friends,

The world has changed dramatically since we launched the annual ASDA'A Burson-Marsteller Arab Youth Survey in 2008. The first seismic shift came with the global financial crisis, which pushed institutions and even nations to the brink of collapse. Today, the aftershocks of that crisis can still be felt across much of the Middle East.

Economic instability brought about a period of social unrest, beginning in our region with the events of the Arab Spring, which began in late 2010 and inspired new mass movements, such as Occupy Wall Street, around the world.

Destabilised by the global financial crisis and disenfranchised from the political process, the frustration felt by many young Arabs in late 2010 and early 2011 was hardly new. But, empowered by new technology like Facebook and Twitter, Arab Spring protesters came together in unexpected ways, and achieved once-in-a-lifetime political change that almost no one saw coming.

For the 2012 survey, we spoke to the region's youth one year after the start of these dramatic events that began in Tunisia, one of the two new countries, along with Libya, we introduced to this year's survey. We have thus themed this year's survey, "After the Spring."

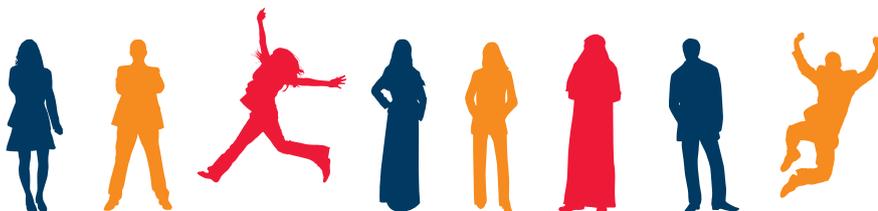
In the wake of this period of incredible change, the findings of the ASDA'A Burson-Marsteller Arab Youth Survey 2012 reveal that young people in the Middle East are now less concerned about greater political participation – although that is still important to them.

Today, however, the top priorities for young people in the Arab world are earning a fair wage and owning their own home.

Indeed, a survey-topping 82 per cent of all youth surveyed say that being paid a fair wage is "very important" to them, up from just 63 per cent in 2011. Of note, being paid a fair wage is not only the highest collective priority among those surveyed, but is also the highest individual priority in each of the 12 countries surveyed.

Owning their own home is the second-highest priority for Arab youth, with 65 per cent of those surveyed saying this is "very important" to them, a slight increase from 61 per cent in 2011. Over the same period, the percentage of young people who said that living in a democratic country is "very important" to them declined by 10 per cent – from 68 per cent in 2011 to 58 per cent in 2012.

In this region where two-thirds of the population is under the age of 30, the priority among youth is clear: jobs and homes.



If these findings speak for themselves, I must nevertheless take this opportunity to address a question that I am frequently asked: Why does a Public Relations consultancy invest its time, energy and capital to conduct a survey like this, year after year?

We carry out the survey and share these annual findings with the public because we understand how important it is to be able to access reliable data here in the Middle East, where research into public opinion is in very short supply.

That is why, every year, ASDA'A Burson-Marsteller makes this signal investment in thought leadership and to demonstrate our belief in the Burson-Marsteller

credo: "Evidence-Based Communications." We are proud to be able to make this contribution to the community we serve and to our clients, who place their trust in us every day.

Eighteen months after the onset of the Arab Spring, in the midst of this period of transformation, we need to listen more closely than ever before to the people who provided much of the impetus for these uprisings, and who will be most affected by them in the years ahead.

The Middle East and North Africa (MENA) region is home to one of the highest proportions of young people in the world. There are, of course, wonderful opportunities inherent in this fact.

Young people, everywhere, are a source of energy and ideas. They are our innovators, our entrepreneurs and, usually, our greatest optimists. They

have an endless drive to reinterpret and reinvent the world – and we ignore them at our peril.

This principle, in no small part, was the thinking behind our decision to establish the annual ASDA'A Burson-Marsteller Arab Youth Survey back in 2008, and it remains the driving force behind the project today. The fact is, we can endlessly debate the challenges and opportunities presented by regional youth, but until we actively engage young people in this discussion, we will be doing little more than playing with shadows.

Today, it has become more important than ever that we understand the aspirations, anxieties and attitudes of regional youth.

Keep in mind that the ASDA'A Burson-Marsteller Arab Youth Survey 2012 doesn't only tell us what young people in the region think about traditional values, or which media they use, or how they feel about various models of governance.

I hope these individual insights make for illuminating reading. The real value of a survey like this, though, is less about the particulars and more about how they come together to tell us something about the wider region – and the wider world.

I am proud to say that the ASDA'A Burson-Marsteller Arab Youth Survey 2012 is packed with a wide range of thought-provoking, and often surprising, insights. We owe it to the youth of our region, and to ourselves, to pay attention to the findings of this landmark annual survey – and to hear the voices of the next generation.

I hope very much that this annual initiative by our firm helps inform the decision-making process of regional governments, businesses and civil society institutions, marking our contribution to the future of this young and dynamic region.

Handwritten signature of Sunil John.

Sincerely,

Sunil John
Chief Executive Officer
ASDA'A Burson-Marsteller

SURVEY METHODOLOGY

The ASDA'A Burson-Marsteller Arab Youth Survey 2012 was conducted by international polling firm Penn Schoen Berland (PSB) between December 2011-January 2012, and included 2,500 face-to-face interviews with Arab men and women aged 18 to 24.

The aim of this annual survey is to present evidence-based insights into the attitudes of Arab youth, providing public and private-sector organisations with data and analysis to inform their decision-making and policy formation.

The survey is the most comprehensive of its kind, covering 12 MENA countries: the six Gulf Cooperation Council states (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE), Egypt, Jordan, Lebanon, Iraq and, for the first time, Libya and Tunisia.

Participants were interviewed in-depth about subjects ranging from the political to the personal; topics explored include the outcomes and uncertainties of the Arab Spring, economic opportunity, media preferences and attitudes toward traditional values.

Respondents, including exclusively nationals of each of the surveyed countries, were selected to provide an accurate reflection of each nation's geographic and socio-economic make-up. The entire sample was weighted to

include 20 per cent of respondents from the AB socio-economic group and 40 per cent from both the C1 and C2 groups.

The gender split of the survey is 60:40 male to female. The margin of error of the ASDA'A Burson-Marsteller Arab Youth Survey 2012 is +/-2.19 per cent.

There were 200 respondents for each country represented in the survey, except for the UAE, Saudi and Egypt, with 250 respondents each, and Oman, with 150.

The geographic location of respondents was also taken into account by PSB when developing the fieldwork methodology – with, for example, 50 per cent of Libyan respondents interviewed in Tripoli, 25 per cent in Benghazi and the final 25 per cent in Misrata.

In the same way, UAE respondents were drawn from three of the country's emirates: Abu Dhabi, Dubai and Sharjah; Kuwait's youth from four distinct regions: Kuwait City, Al Hawalli, Al Ahmadi and Al Farwaniya; Lebanese youth from East and West Beirut, and from Tripoli; Tunisian youth from Tunis, Safaqis and Susah; and so on across each country.

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



**PENN
SCHOEN
BERLAND**



New in 2011

New in 2012

UAE	Oman	Qatar	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon	Iraq	Tunisia	Libya
N=250	N=150	N=200	N=200	N=250	N=200	N=250	N=200	N=200	N=200	N=200	N=200
Dubai 40%	Muscat 50%	Doha 55%	Manama 100%	Jeddah 40%	Kuwait City 20%	Cairo 50%	Amman 50%	East Beirut 40%	Baghdad 50%	Tunis 50%	Tripoli 50%
Sharjah 20%	Batinah 50%	Al Rayyan 45%		Riyadh 40%	Al Hawalli 30%	Alexandria 25%	Irbid 25%	West Beirut 40%	Irbil 25%	Safaqis 25%	Benghazi 25%
Abu Dhabi 40%				Dammam 20%	Al Ahmadi 20%	Mansoura 25%	Zarqa 25%	Tripoli 20%	Basrah 25%	Susah 25%	Misrata 25%
					Al Farwaniya 30%						



INTRODUCTION



Two-thirds of the MENA population is under the age of 30, well above the global average, and the number of young people here continues to grow. Meeting the needs of this critical demographic, of well over 200 million young people, represents the greatest challenge facing the Arab world.

Yet the mutually perpetuating issues of poor education and lack of employment (along with a dearth of affordable housing) have yet to be addressed in any meaningful way. Region-wide, youth unemployment stands at an untenable 25-plus per cent. In under a decade, the Arab world could very well face the spectre of having tens of millions of jobless, directionless youth in its midst.

It is surely no coincidence that the Arab Spring bloomed most vividly in countries where these basic opportunities are most lacking. Indeed, if the events of the past 18 months have taught us anything, it is that we can no longer afford to marginalise or disenfranchise Arab youth.

In some sense, the protests that have swept the region in the last year have been less about ushering in democracy and more about ushering in change. The emphasis has been on the destruction of the old guard rather than reconstruction, which does not bode well, at least in the very short term.

Indeed, there is already evidence that democracy here will turn out to be a double-edged sword for those who covet inclusive, egalitarian governance. The unpalatable truth is that the intensity of public disaffection has led people to embrace changes that may, in the long

run, leave them no better off than they were before.

There is no one-size-fits-all solution to the social, political and economic challenges facing the region. In the Gulf, more must be done to shift the emphasis away from public-sector employment. Investment in small and medium-sized enterprises, from both the public and private sectors, needs to be stepped up. Research and development must be nurtured more effectively, which will require grassroots educational reform.

Elsewhere in the region, the problems are so ingrained that it is sometimes difficult to see how they can be addressed in any satisfactory fashion. The issues facing Egypt, Libya, Yemen and similarly afflicted states are manifold: a lack of infrastructure and basic services, state corruption, high unemployment and a pervasive sense of either apathy or anger among the populace.

Compounding these challenges, the combined effect of the global financial crisis and the events of the Arab Spring has had a disastrously negative impact on foreign direct investment (FDI) into the region. From US\$92 billion in 2008, total FDI inflows dropped to just US\$30 billion last year – and they are predicted to drop further, to US\$29 billion, in 2012.

Foreign investors are also increasingly concerned about the potential for longer-term regional instability, especially in transitional, post-Arab Spring states like Egypt, Tunisia, Libya and Yemen, where the priorities of incoming governments remain unclear.

At the same time that FDI flows are decreasing, governments across the Middle East are under ever-greater pressure to subsidise the rising cost of living – which, as this year’s survey makes plain, is the greatest concern among Arab youth today.

Consider that, according to the International Monetary Fund, the MENA region invested US\$200 billion in price subsidies in 2010, which is equivalent

“ A potential source of enduring hope for the region is the sense of optimism that perseveres among young people here. ”

to nearly 8 per cent of the region’s total GDP. In 2010, US\$30 billion of that capital was spent directly on subsidising the price of food.

As commodity prices rise, resources become more scarce, and FDI levels remain stagnant or decrease, it is difficult to see how at least some regional governments can continue to foot this growing bill.

There must be at least some degree of regional cooperation in finding solutions

to these problems. And even then it will take time, something that seems to be in short supply right now. With sustained high energy prices generating increased liquidity for Gulf oil states to invest in infrastructure and subsidies, countries like Saudi Arabia, the UAE, Qatar and Kuwait can continue to lead regional growth. But the GCC states alone cannot address all the challenges facing the wider Middle East.

We should not, however, overlook the region’s success stories. Qatar has shown what can happen when the revenues generated by natural resources are put to effective use. The UAE – and Dubai in particular – has demonstrated that Arab nations can thrive by embracing economic diversification and promoting a culture founded upon the principles of cosmopolitanism and inclusivity. Lebanon has proven time and again that adversity cannot trump spirit, smarts and sheer determination.

Some might raise their eyebrows at this last observation, including the Lebanese youth themselves, who are among the most vocally disgruntled people in the region (as evidenced by this year’s survey). And yet this tendency toward dissatisfaction could reasonably be seen as a backhanded expression of self-belief: no matter what strides these people make, they know they could do better.

One of the key findings of the Fourth Annual Burson-Marsteller Arab Youth Survey – and a potential source of enduring hope for the region – is the sense of optimism that perseveres among young people here. In every country the survey covers, the majority of respondents

say that they believe that better days lie ahead, even in the countries hardest hit by political and social strife.

Skeptics might point out that such attitudes are likely to be a reflection of how bad things are at the moment, rather than how good things may be down the road. But the point is that when Arab youth look forward, they are also looking up.

It has become something of a cliché to say that the Middle East’s most precious natural resource is its youth – but, like all clichés, this one contains a large element of truth.

You can see the great promise of Arab youth throughout this survey: in the level of engagement in current affairs, the sophisticated use of technology, the pragmatism and practicality of post-Arab Spring expectations. There is, certainly, very little of the old fatalism here, and that in itself is a remarkable thing.

There has long been, in the Arab world as elsewhere, a tendency to trivialise the concerns of young people, or, at best, to file them away as something to be dealt with later. But now, at last, regional youth have started taking matters into their own hands.

The success of this enterprise will depend in large part on the extent to which Arab youth can translate their current unity of purpose into something resembling national and even regional cohesion. How far and how quickly they are able to achieve this, of course, remains to be seen.

GCC, Levant and North Africa: Economic & IT Indicators 2011

GCC

Country	Population (million)	GDP - PPP (US billion)	Contribution of oil to GDP (%)	Unemployment (%)	Internet Penetration (million)	Penetration Rate (%)	Facebook penetration (million)	Penetration Rate (%)
Saudi Arabia	26.5	676.7	45	28.2	11.4	43	5.34	20
UAE	8.26	260.8	25	4.3	3.55	43	3.16	38
Qatar	1.95	181.7	50	0.4	0.56	28	0.54	27
Kuwait	2.8	149.8	50	2.2	1.1	40	0.9	32
Oman	3.1	80.9	9	15	1.74	56	0.45	14
Bahrain	1.2	30.8	11	15	0.69	57	0.35	29

8

LEVANT

Country	Population (million)	GDP - PPP (US billion)	Contribution of oil to GDP (%)	Unemployment (%)	Internet Penetration (million)	Penetration Rate (%)	Facebook penetration (million)	Penetration Rate (%)
Iraq	31.1	127.2	NA	15	1.3	4	1.6	5.3
Syria	22.5	107.6	NA	8.3	4.5	20	NA	NA
Lebanon	4.1	61.6	NA	NA	1.37	33	1.4	34
Jordan	6.5	36.8	NA	12.3	1.98	30	2.2	34
Palestine Authority	4.2	12.95	NA	16.5	1.5	35	0.95	22

NORTH AFRICA

Country	Population (million)	GDP - PPP (US billion)	Contribution of oil to GDP (%)	Unemployment (%)	Internet Penetration (million)	Penetration Rate (%)	Facebook penetration (million)	Penetration Rate (%)
Egypt	82	518	NA	12.4	21.7	26	10.7	13
Algeria	35	264	30	9.7	4.7	13.4	3.4	9.7
Morocco	36	162.6	NA	8.1	15.6	43	4.4	12
Tunisia	10.7	100.9	NA	19	3.8	35	2.9	27
Libya	6.7	NA	65	30	0.39	5.8	0.48	7

Source for Internet data: Internet World Stats

Source for Facebook data: Social Baker & Internet World Stats

Source for GDP and other figures: CIA Fact File, Wikipedia, UAEinteract.com, Global Finance

Note:

The internet penetration and Facebook penetration rates in the region have been revised based on the new population figures available

Facebook penetration in Iraq is reported as more than its Internet penetration; the discrepancy could also be due to lack of up-to-date information on internet usage



TOP 10 FINDINGS

1

FAIR PAY AND HOME OWNERSHIP DISPLACE DESIRE FOR DEMOCRACY AS TOP PRIORITY

Young people in the Middle East say that being paid a fair wage and owning their own home are their two highest priorities – displacing their previous number-one priority, living in a democratic country

2

HIGH COST OF LIVING REMAINS THE GREATEST CONCERN AMONG ARAB YOUTH

One year after the start of the Arab Spring, the rising cost of living is the greatest concern among youth across the Middle East

3

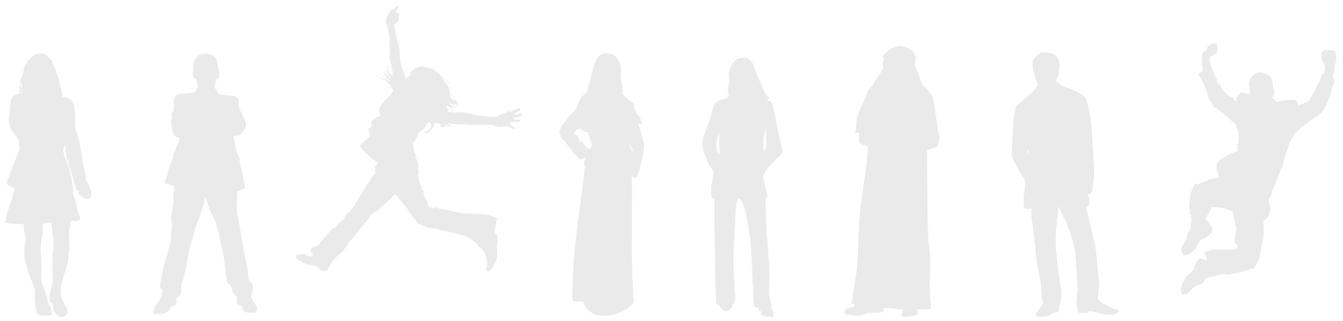
ARAB YOUTH SAY THAT LACK OF DEMOCRACY AND CIVIL UNREST ARE THE BIGGEST OBSTACLES FACING THEM & THE REGION

Arab youth identify two equally significant and closely linked obstacles facing the Middle East today

4

REGIONAL YOUTH SEE THE ARAB SPRING AS A POSITIVE DEVELOPMENT AND NOW FEEL GREATER OPTIMISM ABOUT THE FUTURE

Young people in the Middle East feel strongly that the region is better off, and so are they personally, as a consequence of the Arab Spring; they also continue to believe that things in their country are going in the right direction



5

ARAB YOUTH FEEL AN INCREASED SENSE OF TRUST IN GOVERNMENT BUT HAVE HEIGHTENED CONCERNS ABOUT CORRUPTION

Nearly three-quarters of Middle East youth believe their government has become more trustworthy and transparent since the events of the Arab Spring – at the same time that concerns about corruption have increased

6

THE ARAB SPRING WILL NOT SPREAD FURTHER, ACCORDING TO THE REGION'S YOUTH

Less than one-quarter of Middle East youth believe that protest movements will spread to new countries; among those who believe that such movements will spread, Jordan, Morocco and Algeria are seen as the most likely sites of protests

7

TRADITIONAL VALUES ARE BEING INCREASINGLY CHALLENGED BY A MODERN OUTLOOK

A majority of young people in every Middle East state agrees that traditional values are paramount; however, the percentage of youth who say that such values are outdated and need to be replaced continues to increase

8

THE UAE IS SEEN AS A MODEL NATION BY MIDDLE EAST YOUTH

When Arab youth look across the region and the world, they see the United Arab Emirates as the country where they would most like to live – and as the country they would most like their own nation to emulate

9

ARAB YOUTH SEE FRANCE MOST FAVOURABLY AMONG ALL FOREIGN COUNTRIES; VIEWS OF CHINA AND INDIA ARE ALSO INCREASINGLY POSITIVE

One year after the start of the Arab Spring, young people in the Middle East have changed some of their views of major foreign powers, and now look more favourably upon France, China and India

10

NEWS CONSUMPTION SKYROCKETS, TV VIEWERSHIP DECLINES & BLOGS ARE BOOMING

After a period of enormous political change, Arab youth are following the news far more keenly than ever before – but less frequently on television and more often on the Internet; they have also developed a passion for the blogosphere

EXECUTIVE SUMMARY

Eighteen months after the onset of the Arab Spring, the ASDA'A Burson-Marsteller Arab Youth Survey, now in its fourth year, reveals that the **emphasis on democracy has been superseded by economic concerns**. Where in 2011 "living in a democratic country" was deemed "very important" by 68 per cent of respondents, this response saw a 10 per cent slump in the 2012 survey, to 58 per cent. The only time democracy has been prioritised lower was in 2008, at the time of the first annual Survey, when just 50 per cent of Arab youth saw it as very important.

This year, **being paid a fair wage** is not only the highest collective priority among those surveyed – with 82 per cent of all Arab youth citing it as "very important" – but is also the highest individual priority in each of the 12 countries covered.

Wage concerns are highest in Oman, where 90 per cent see it as very important, and lowest in Saudi Arabia, at 74 per cent. **Home ownership comes second in the list of priorities** in 2012, with 65 per cent of all respondents stressing its importance, a rise of 4 per cent over 2011.

In 2012, as with last year, the greatest single concern among Arab youth is **the rising cost of living**, with 63 per cent saying they are "very concerned," a 6 per cent hike over 2011. The "danger of drugs" takes the place of "standard of living" as the second-greatest concern among young people in 2012, with 49 per cent saying they are "very concerned" about the issue. The rising cost of living is also seen as being the biggest challenge facing the Arab world, with 54 per cent of all respondents saying the issue overshadows others in the region.

Meanwhile, **the lack of democracy and the prospect of civil unrest** are named as the two biggest obstacles facing the Middle East, with each being cited by 41 per cent of respondents.

Despite all this, **optimism is on the rise**, driven in part by positive perceptions of the Arab Spring. In general, young people in the Middle East feel that their country of residence has headed in the right direction over the previous five years, a sentiment held most strongly in Saudi Arabia, where 97 per cent respond positively, and most weakly in Lebanon, at 33 per cent.

The picture changes, though, when the question shifts to whether countries are moving in the right direction since the start of the current year. Only 56 per cent of Saudis say yes to this. Young Libyans, meanwhile, seem much more positive about their country's short-term improvement, with 70 per cent saying it has moved in the right direction since the start of the year, a significant increase over the 47 per cent who view the previous five years favourably.

Among all regional youth, 72 per cent feel the Middle East is better off since the Arab Spring began, with 68 per cent saying they are personally better off.

The Arab Spring has also served to boost **trust in regional governments**, with nearly three-quarters of Middle East youth saying their government has become more trustworthy and transparent since the uprisings. Faith in improved governance standards is highest in Libya, where 86 per cent of youth say their government has become more trustworthy and transparent.

Nevertheless, 42 per cent of Arab youth say that **corruption in government**



and public life is one of the biggest challenges facing the Middle East, up from 16 per cent in 2011. Youth in Egypt are by far the most concerned about this issue, with 66 per cent saying that corruption is the biggest challenge.

When asked whether they expect **protests to spread to other countries** in the region, only 24 per cent of Arab youth say yes, with 59 per cent thinking this outcome unlikely and 17 per cent saying they don't know.

Where in 2011 "living in a democratic country" was deemed "very important" by 68 per cent of respondents, this response saw a 10 per cent slump in the 2012 survey, to 58 per cent

Of all the countries surveyed, Tunisia is the only one in which a majority of young people expect the protests to spread, with 56 per cent responding positively. Young people who think the protests will spread single out Jordan as the most likely hot spot, followed by Morocco and Algeria.

A majority of young people in every Middle East state agree that **traditional values are paramount**; however, the percentage of youth who say that such values are outdated and need to be replaced continues to increase. In Tunisia, 44 per cent say that "traditional values are outdated and belong in the past," compared to 21 per cent who agree with this claim in the UAE, and 18 per cent in Libya.

Some 33 per cent of Arab youth select the UAE as the **country in the world**

they would most like to live, with France coming in second (17 per cent), followed by the United States and Turkey (16 per cent each) and Saudi Arabia (14 per cent).

Asked which country in the world they would most like their own country to be like, the UAE is also the top choice, named by 40 per cent of young Arabs, followed by Turkey (28 per cent), Saudi Arabia (18 per cent) and Qatar (16 per cent).

When presented with the statement "I feel **my country can compete on a world stage**," youth in the UAE, predictably, emerge as the most bullish, with 84 per cent of respondents agreeing. More surprising is the fact that Libyan youth came in a close second, at 80 per cent, while only 58 per cent of young Qataris share their confidence. Lebanese youth are the most pessimistic, with 54 per cent agreeing with the statement "I feel my country is lagging behind the rest of the world."

A year after the Arab Spring, there are significant swings in **how regional youth perceive foreign powers**. Among all non-Arab nations, respondents feel most favourable toward France, with 46 per cent expressing a favourable opinion, up from 39 per cent last year.

In 2011, the UK was the most favourably viewed, at 43 per cent, compared to a significantly lower 34 per cent today. The US fares no better, with its favourability among Arab youth dropping from 41 per cent to 31 per cent over the last year. Favourable perceptions of China and India, meanwhile, are on the rise, increasing to 41 per cent and 28 per cent, respectively.

News consumption among Arab youth has increased dramatically since the uprisings, with 52 per cent saying they update themselves on news and current affairs every day – up from just 18 per cent in 2011.

Television remains the most important source of news for Arab youth, with 62% of respondents saying their turn on the TV to get their news – but that number has declined from 79% last year.

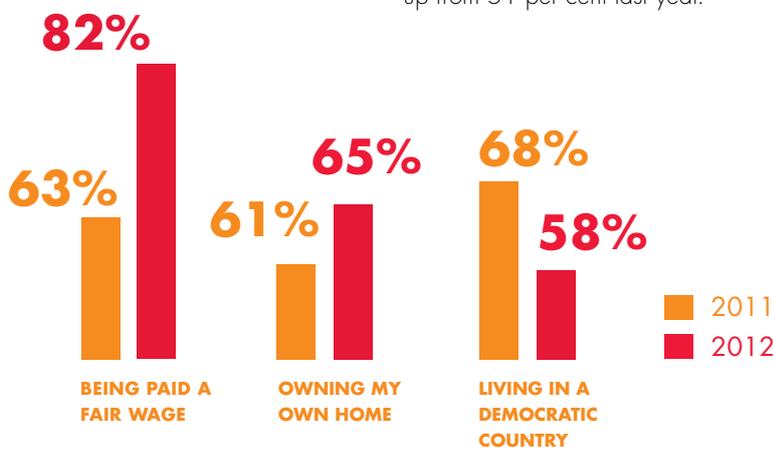
With the influence of newspapers on the wane and print magazines becoming less relevant, the number of regional youth who either **read or write blogs** has more than doubled in the last year, from 29 per cent in 2011 to 61 per cent now.

1. FAIR PAY AND HOME OWNERSHIP DISPLACE DESIRE FOR DEMOCRACY AS TOP PRIORITY

In the 2011 ASDA'A Burson-Marsteller Arab Youth Survey, conducted at the onset of the Arab Spring, a survey-topping 68 per cent of those surveyed said that living in a democratic country was "very important." In the 2012 survey, that figure declines 10 points to 58 per cent.

Young people in the Middle East now say that being paid a fair wage and owning their own home are their two highest priorities – displacing their previous number-one priority, living in a democratic country.

Indeed, the 2012 survey uncovered some unexpected attitudes toward democracy in the region. While it should come as no surprise that a majority of Lebanese youth (65 per cent) say that living in a democratic country is "very important" to them, it is also worth noting the response in Saudi Arabia, where 68 per cent stress the importance of living in a democracy, up from 51 per cent last year.



In Iraq, where the fledgling democratic tradition has had a little time to take root, 46 per cent of young people say that living in a democracy is "very important" to them, down dramatically from 91 per cent the previous year.

Conversely, Egyptian youth continue to place a very high premium on democracy, with 75 per cent describing it as "very important." Libyan youth, too, prioritise democracy, with 68 per cent saying it is "very important" to them, while 67 per cent of Tunisian young people agree.

The numbers suggest that young people in the countries most affected by the Arab Spring remain relatively committed to the idea of democracy, but are wary of its outcomes.

As well, economic uncertainty seems to be of particular concern in the wake of the unrest. This is especially apparent when you consider the two categories that have replaced democracy as priorities for Arab youth: being paid a fair wage, which is deemed "very important" to 82 per cent of all respondents, and home ownership, which comes in second with 65 per cent.

“The numbers suggest that young people in the countries most affected by the Arab Spring remain relatively committed to the idea of democracy, but are wary of its outcomes.”

Being paid a fair wage is especially important to young people in Oman, where 90 per cent say this is "very important" to them, followed by Jordan (87 per cent) and Libya (85 per cent).

Home ownership, meanwhile, is of special significance to Lebanese youth, 75 per cent of whom say this is "very important," followed by Egypt (71 per cent), Tunisia and Bahrain (67 per cent each).



2. HIGH COST OF LIVING REMAINS THE GREATEST CONCERN AMONG ARAB YOUTH

Economic considerations figure very prominently when it comes to the concerns of Arab youth. In the wake of the events of the Arab Spring, the top concern in the region is now clearly the rising cost of living, with 63 per cent of respondents saying they are “very concerned,” up from 57 per cent last year.

Concern about the rising cost of living is most acute in Tunisia, (74 per cent), followed by Libya (68 per cent) and Egypt (65 per cent) – the three countries in the survey most affected by the Arab Spring.

Across the region, meanwhile, 40 per cent of young people say they are “very concerned” about the prospect of civil unrest.

In terms of individual countries, there is some variation in the most significant concerns. In Oman, for example, the top concern is “opportunities for women,” with 52 per cent of young people say they are “very concerned,” compared to 47 per

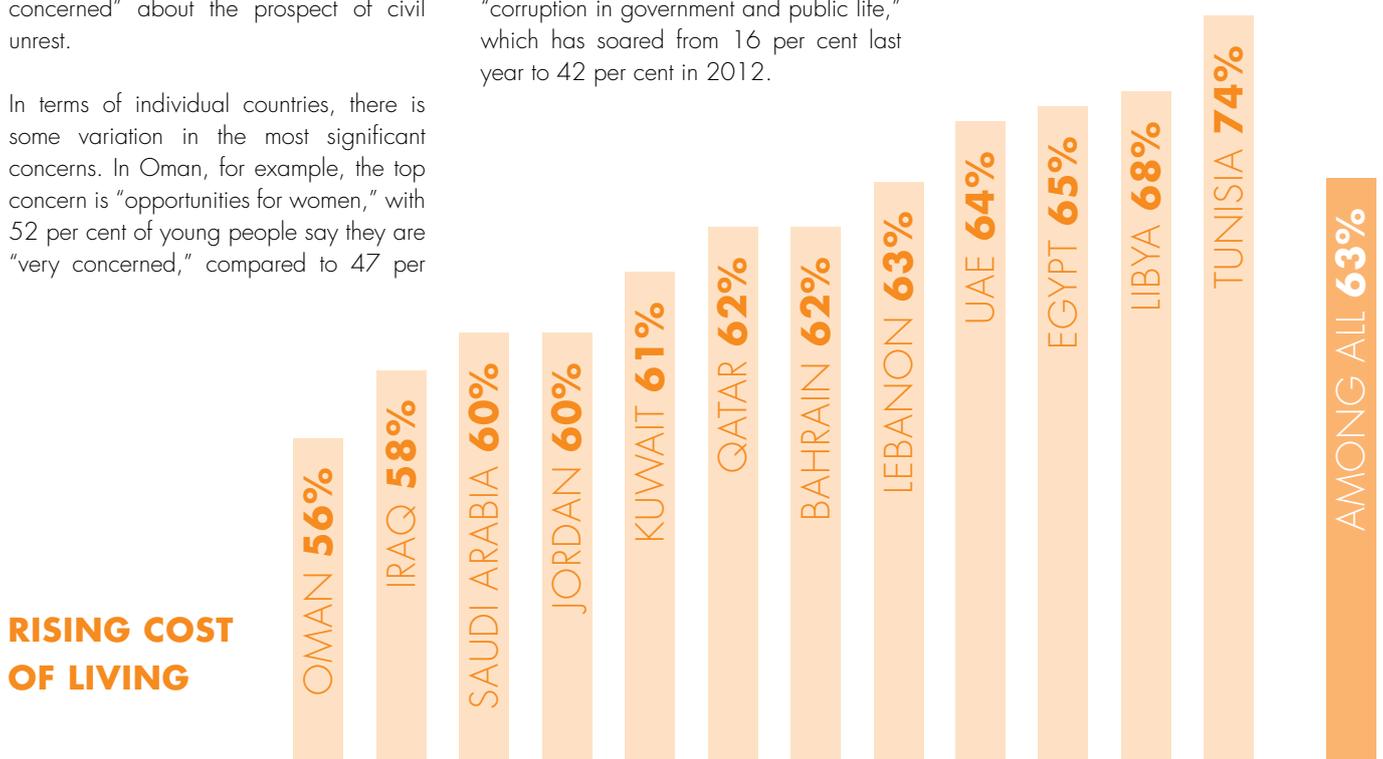
cent for the rising cost of living.

In Iraq, concern about the rising cost of living is matched by concern over the loss of traditional values and culture (55 per cent each). Otherwise, the rising cost of living scores highest in each of the 12 countries surveyed.

The rising cost of living is also prevalent in questions about challenges facing the Middle East – as opposed to individual concerns – with 54 per cent of respondents saying it is the biggest challenge, up from 46 per cent last year.

The second biggest perceived challenge is “corruption in government and public life,” which has soared from 16 per cent last year to 42 per cent in 2012.

Youth in the GCC and in countries outside the Gulf are nearly equally concerned about this: 56 per cent of GCC youth say the rising cost of the living is the biggest challenge facing the Middle East, while 52 per cent of non-GCC youth share this sentiment.



3. ARAB YOUTH SAY THAT LACK OF DEMOCRACY AND CIVIL UNREST ARE THE BIGGEST OBSTACLES FACING THEM & THE REGION

Today, regional youth identify two equally significant and closely linked obstacles facing the Middle East. Among all respondents in the 2012 survey, 41 per cent say that the lack of democracy is the biggest obstacle facing the region; an equal percentage identifies civil unrest as the biggest obstacle.

where 26 and 28 per cent of young people, respectively, say civil unrest is a major obstacle – the lowest among all countries surveyed.

In Saudi Arabia, a disproportionate number focus on civil unrest, with 55 per cent saying it is the biggest obstacle, as opposed to the 37 per cent who cite a lack of democracy.

Some 55 per cent of Egyptian youth say lack of democracy is the biggest obstacle facing the region, significantly overshadowing the 41 per cent who cite civil unrest. The country with the second-highest percentage of young people who emphasise civil unrest is Bahrain (46 per cent), followed by Jordan and the UAE (45 per cent each).

On the whole, youth in the GCC see civil unrest (44 per cent) as a very slightly larger obstacle for the region than the lack of democracy (43 per cent). However, young people elsewhere in the Middle East say that the lack of democracy is a greater obstacle (40 per cent) than civil unrest (37 per cent.)

Additional obstacles identified by regional youth include the Israel-Palestinian conflict and lack of Arab unity (27 per cent each) and lack of political direction (23 per cent). Tunisian youth identify the Palestinian-Israeli conflict as the number-one obstacle facing the region (36 per cent), while their peers in Libya say that a lack of Arab unity is the greatest obstacle (30 per cent).

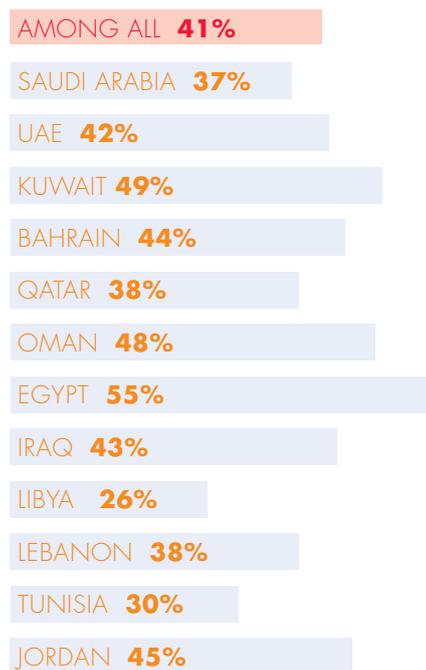
CIVIL UNREST

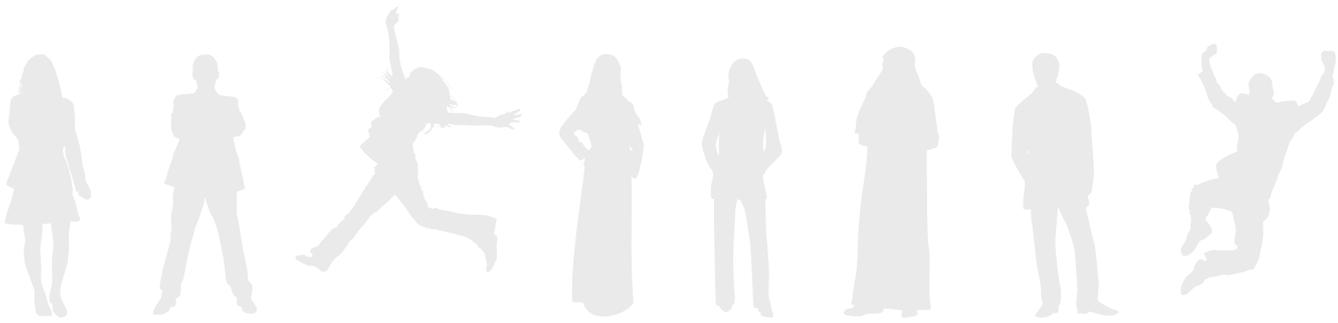


These numbers would seem to suggest a contradiction, given that much of the recent unrest has ostensibly been sparked by the lack of democracy. But there seems to be an understanding among regional youth that democracy and stability are mutually reliant: you cannot have one without the other. There is also an understanding that civil conflict has had a detrimental effect on regional economies, which is of great concern to young people.

Intriguingly, the prospect of civil unrest is not greatly emphasised as an obstacle by youth in two of the countries most effected by recent uprisings: Libya and Tunisia,

LACK OF DEMOCRACY





4. REGIONAL YOUTH SEE THE ARAB SPRING AS A POSITIVE DEVELOPMENT AND NOW FEEL GREATER OPTIMISM ABOUT THE FUTURE

Young people in the Middle East feel strongly that the region is better off, and that they are better off personally, as a consequence of the Arab Spring; they also continue to believe that conditions in their country are improving.

Today, 62 per cent of Arab youth believe that things in their country of residence are going in the right direction, up from 58 per cent in 2011. Youth in the GCC see their individual countries as increasingly moving in the right direction, with 74 per cent agreeing with this characterisation, compared to 68 per cent in 2011; confidence among non-GCC youth remains stable at 50 per cent, compared to 49 per cent in 2011.

The most remarkable leap in optimism occurred among youth in Egypt, where 74 per cent of young people said that, in the context of the previous five years, they believe their country is heading in the right direction, compared to 38 per cent who made the same claim in 2011. This bullishness is tempered somewhat by the 62 per cent of young Egyptians who admit that recent events have left them feeling anxious about the future.

When asked, "Since the start of 2011, do you think things in your country of residence are now heading in the right direction or the wrong direction," 56 per cent of all youth surveyed say their country is moving in the right direction.

Interesting, in response to the same question, male respondents are more

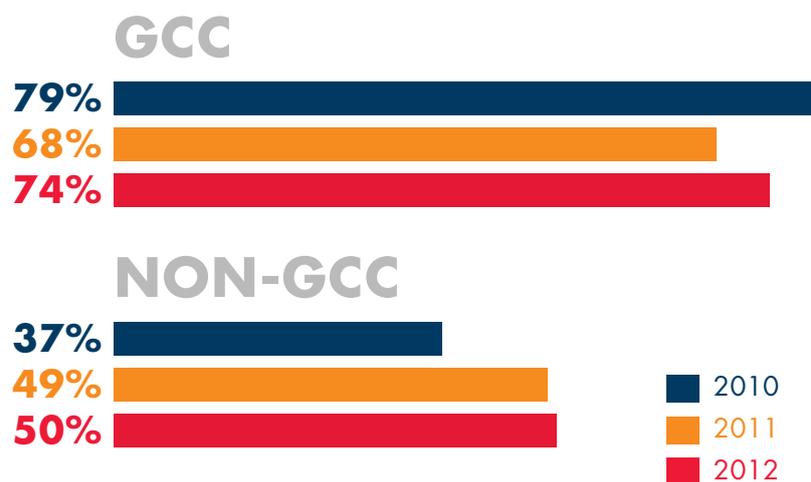
optimistic than are female respondents, with 58 per cent of young Arab men saying that their country of residence is moving in the right direction, compared to 50 per cent of female respondents.

Among Middle East youth as a whole, 72 per cent agree that, following the events of the Arab Spring, the region is better off today, while 68 per cent of Arab youth say that they are personally better off than they were before the uprisings began.

An even greater percentage of Arab youth (71 per cent) say that, as a result of the uprisings, they believe that they will be better off five years from now. In Libya, 85 per cent of young people agree with the statement "our best days are ahead of us."

Lebanese youth remain the most pessimistic in the region, with only 33 per cent agreeing that things in their country of residence are going in the right direction, down from 35 per cent in 2011; Tunisian youth are almost equally pessimistic, with just 35 per cent believing that their country is heading in the right direction.

GCC AND NON-GCC VIEWS OF RIGHT DIRECTION OVER LAST THREE YEARS



5. ARAB YOUTH FEEL AN INCREASED SENSE OF TRUST IN GOVERNMENT BUT HAVE HEIGHTENED CONCERNS ABOUT CORRUPTION

Nearly three-quarters of Middle East youth believe their government has become more trustworthy and transparent since the events of the Arab Spring – at the same time as concerns about corruption have heightened.

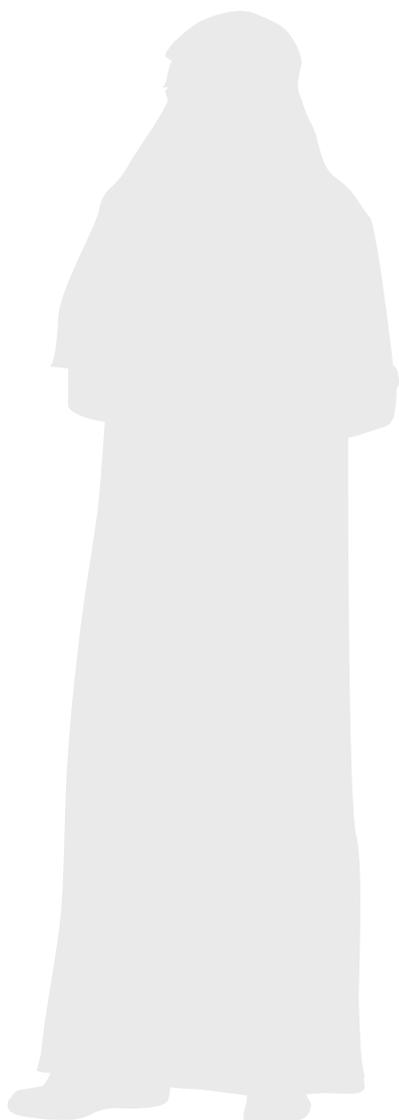
Among Arab youth in general, 72 per cent agree with the statement: “My government has become more trustworthy and transparent since the Arab Spring.” Faith in improved governance standards is highest in Libya, where 86 per cent of youth say their government has become more trustworthy and transparent, followed by Saudi Arabia (84 per cent) and Bahrain (80 per cent).

Nevertheless, 42 per cent of Arab youth say that corruption in government and

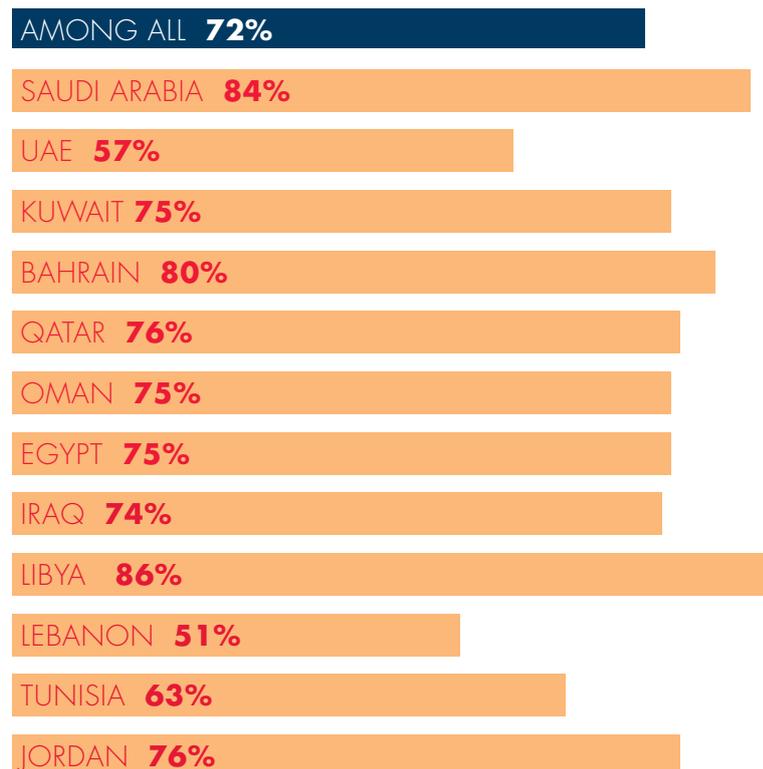
public life is one of the biggest challenges facing the Middle East, up from 16 per cent in 2011.

Youth in Egypt are by far the most concerned about corruption, with 66 per cent saying that the issue is the biggest challenge facing the region; Lebanese youth are also notably concerned about corruption (47 per cent), as are their peers in Oman (45 per cent).

Only 35 per cent of Iraqi youth see official corruption as the biggest challenge facing the region – the lowest number in the survey – a perception that may owe less to the trust Iraqis place in government than the sheer number of challenges they face as individuals and as a country.



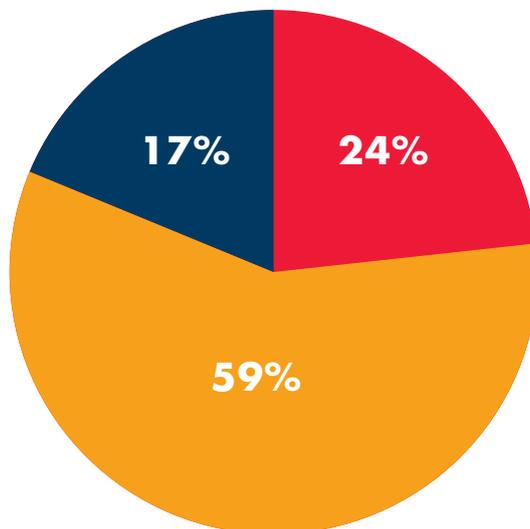
MY GOVERNMENT HAS BECOME MORE TRUSTWORTHY SINCE THE ARAB SPRING



6. THE ARAB SPRING WILL NOT SPREAD FURTHER, ACCORDING TO THE REGION'S YOUTH

Q: DO YOU THINK THE PROTESTS WILL SPREAD TO ANY NEW ARAB COUNTRIES? (%)

■ YES
■ NO
■ DON'T KNOW



Q. IF YES, WHICH COUNTRIES, DO YOU THINK THE PROTESTS ARE MOST LIKELY TO SPREAD TO NEXT?



Less than one-quarter of Middle East youth are of the opinion that protest movements will spread to new countries, with 59 per cent of respondents saying they do not believe the protests will spread, while 17 per cent say they do not know if this will occur.

In the midst of the ongoing civil conflict in Syria, only 24 per cent of regional youth believe that protests will spread to further Middle East nations. Tunisian youth believe most strongly that protest movements will continue to spread in the region, with 56 per cent agreeing with this claim, followed by Iraq (30 per cent) and Libya (28 per cent)

Among the 24 per cent of Arab youth who do believe that protests will spread to further Middle East nations, Jordan is seen as the regional state where such unrest is most likely to occur next, followed by Morocco and Algeria.

Youth in Egypt see the smallest likelihood of protests spreading, with only 11 per cent agreeing with this claim, followed by young people in the UAE (12 per cent) and Kuwait (17 per cent).

More generally, young people in the GCC are less likely to believe that protest movements will spread, with only 19 per cent agreeing with this claim, than are their peers outside the Gulf, 28 per cent of whom believe that protests will spread.

7. TRADITIONAL VALUES ARE BEING INCREASINGLY CHALLENGED BY A MODERN OUTLOOK

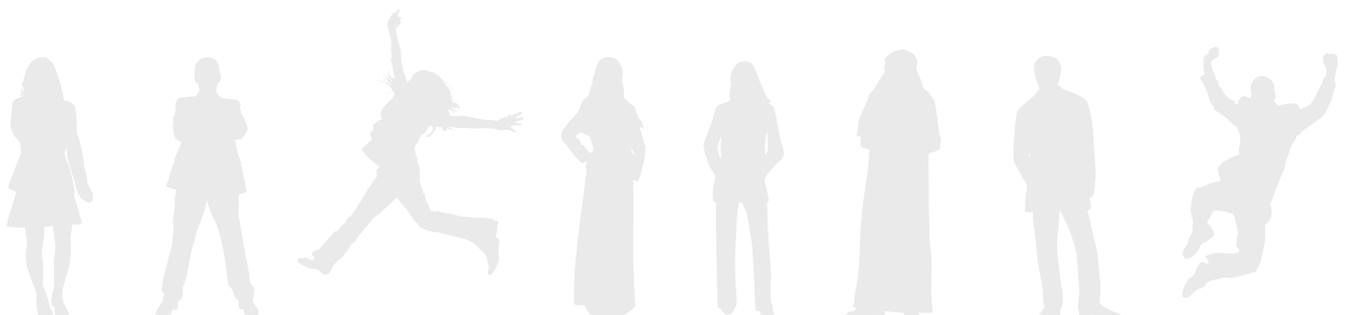
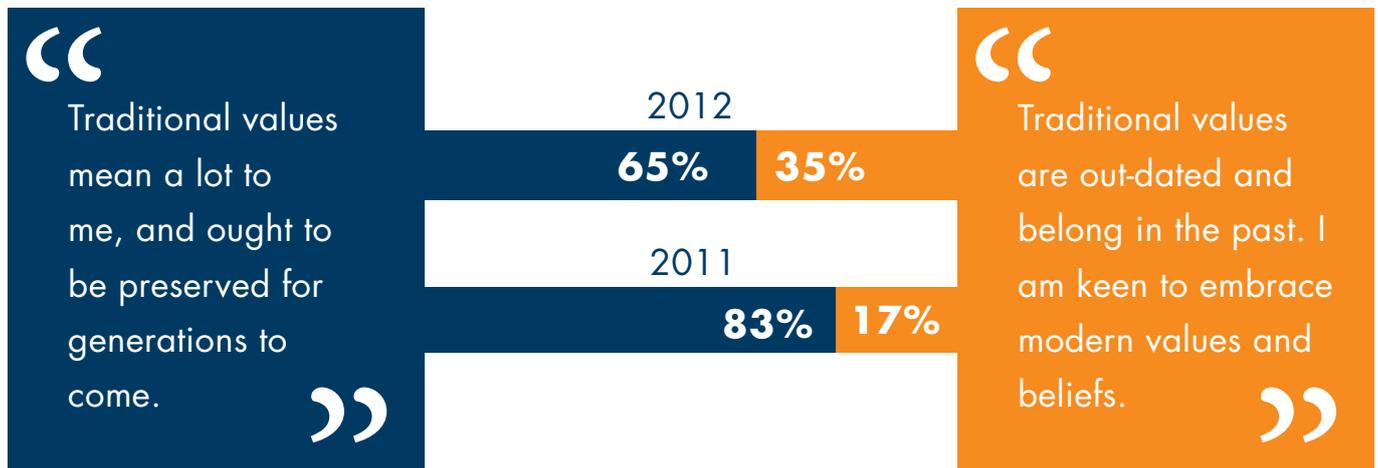
While 65 per cent of the region's young people agree with the claim that "traditional values mean a lot to me and ought to be preserved for generations to come," this is a significant decline from the 83 per cent who agreed with the statement in 2011.

However, a majority of young people in each of the surveyed countries agrees with this statement, with the highest importance placed on traditional values in Libya (82 per cent), the UAE (79 per cent) and Saudi Arabia (78 per cent).

While a majority of Tunisian youth strongly believe in traditional values, a survey-topping 44 per cent agree that "traditional values are outdated and belong in the past." Iraqi youth are also decidedly split

on this question, with 58 per cent in favour of traditional values (compared to 94 per cent in 2011), while 42 per cent believe that modern values should be promoted.

In Jordan and Qatar, 41 per cent of young people agree that "traditional values are out-dated and belong in the past," while 59 per cent in both of these countries agree that "traditional values mean a lot to me and ought to be preserved for generations to come." GCC youth believe slightly more strongly in the importance of traditional values (68 per cent) than do their peers outside the Gulf (63 per cent).



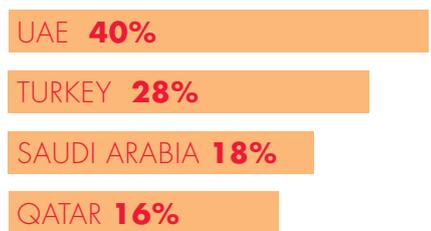
8. THE UAE IS SEEN AS A MODEL NATION BY MIDDLE EAST YOUTH

When Arab youth look across the region and the world, they see the United Arab Emirates as the country where they would most like to live – and as the country they would most like their own nation to emulate.

This would seem to suggest that political stability, economic opportunity and cultural tolerance, rather than Western-style democracy, are the national characteristics most coveted by many regional youth.

Asked which country in the world they would most like their own country to be like, the UAE is the top choice among Arab youth, named by 40 per cent of respondents, followed by Turkey (28 per cent), Saudi Arabia (18 per cent) and Qatar (16 per cent).

Q: WHICH COUNTRY IN THE WORLD WOULD YOU MOST LIKE YOUR COUNTRY TO BE LIKE?



Young Saudis feel most strongly that they would like their country to be like the UAE, with 50 per cent agreeing with this choice, closely followed by young Libyans, 48 per cent of whom also cite the UAE as the country they would most like their own country to be like

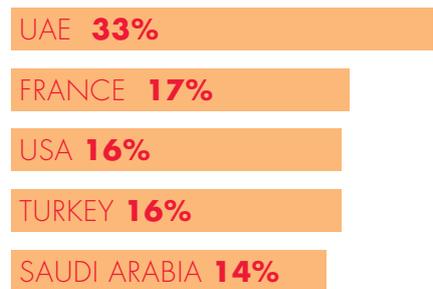
Turkey is seen as a very positive national role model by 42 per cent of Egyptian youth, 33 per cent of whom also say that they would like their country to be like Saudi Arabia.

When asked in which country in the world would they would most like to live, the UAE is the also top choice, with 33 per cent of regional young people citing this

Gulf state, followed by France (17 per cent), the United States and Turkey (16 per cent each) and Saudi Arabia (14 per cent).

Among all the populations surveyed, Lebanese youth would most strongly prefer to live in the UAE, with 43 per cent of young people in Lebanon saying that the UAE is the country where they would most like to live.

Q: WHICH COUNTRY IN THE WORLD WOULD YOU LIKE TO LIVE IN?



Young Egyptians also strongly aspire to live in the UAE, with 38 per cent of Egyptians wishing to live in the Gulf state; Egyptian youth are also strongly attracted to the idea of living in Saudi Arabia (28 per cent) and Turkey (28 per cent).

Among the populations surveyed, Tunisian youth are most strongly attracted to living in the United States, which is cited by 28 per cent of Tunisians as the country where they would most like to live, while just 8 per cent of Egyptian share the same sentiment.

In terms of which country's model of growth and development would they most like their country to follow, the United Arab Emirates is once again the first choice, with 27 per cent of Arab youth citing the country as the best example.

Libyan youth feel most strongly that the UAE is the right model of growth and development, with 36 per cent of young Libyans agreeing with this claim.

Other countries cited as models of growth

and development include the United States and China (19 per cent each), France and Germany (17 per cent each), Turkey (16 per cent) and the United Kingdom (12 per cent).

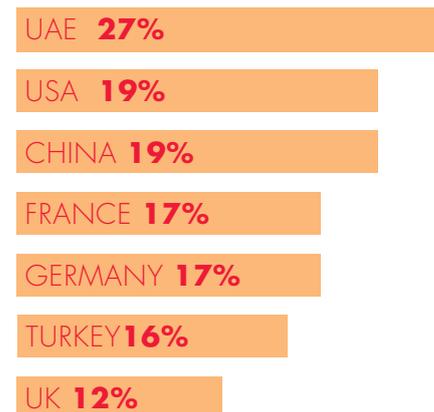
Young Emiratis, for their part, see the United States as a positive model of growth and development, with 25 per cent of UAE youth agreeing with this statement, as do 25 per cent of their peers in Lebanon.

Perhaps unsurprisingly, Emirati youth are the most positive among all nations surveyed when it comes to confidence in their nation's ability to compete internationally, with 84 per cent of young people in the UAE saying that they feel their country can compete on a world stage.

Less obvious is the Arab state with the second-highest level of self-belief: Libya, where 80 per cent of young people say they feel their country can compete on a world stage, followed by Oman and Saudi Arabia (68 per cent each).

Lebanese youth feel most strongly that their country is lagging behind the rest of the world, with 54 per cent agreeing with this claim, followed by Egypt (44 per cent) and Tunisia (42 per cent).

Q: AS YOUR COUNTRY DEVELOPS, WHICH COUNTRY'S MODEL OF GROWTH AND DEVELOPMENT WOULD YOU LIKE YOUR COUNTRY TO FOLLOW?



9. ARAB YOUTH SEE FRANCE MOST FAVOURABLY AMONG ALL FOREIGN COUNTRIES; VIEWS OF CHINA AND INDIA ARE ALSO INCREASINGLY POSITIVE

In the wake of the Arab Spring, young people in the Middle East have changed some of their views of major foreign powers, and now look much less favourably upon the US and the UK.

Young people in the Middle East today view France most favourably among all (non-Arab) foreign nations, with 46 per cent of respondents saying they are “very favourable” towards that nation, compared to 39 per cent in 2011 – when the UK was the most favourably viewed foreign country (43 per cent).

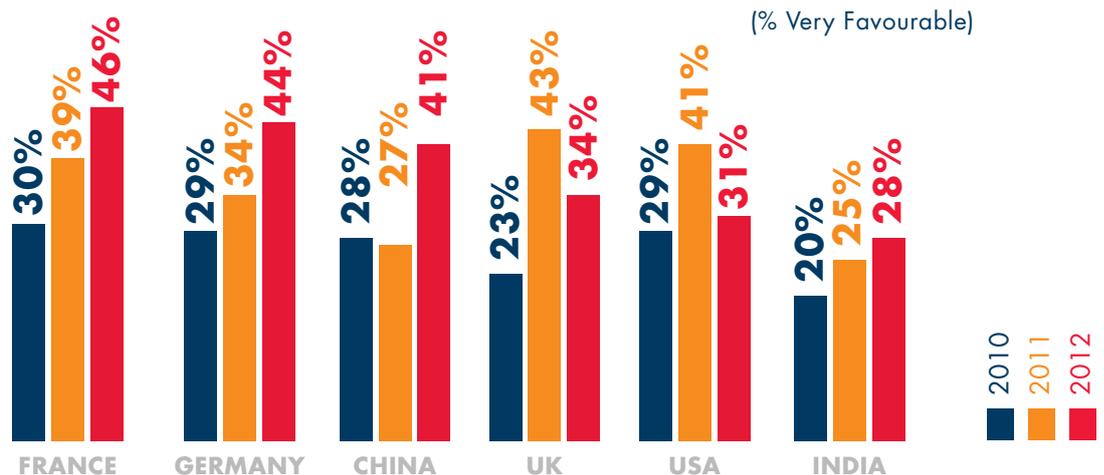
France is now viewed especially favourably by young Libyans (63 per cent), Egyptians (61 per cent) and Qataris (61 per cent), but least favourably by young UAE nationals, with just 28 per cent of them holding a “very favourable” view of France.

Views of the UK are by far most positive in Egypt, where 58 per cent of respondents have a “very favourable” view of the country, and least positive in the UAE, where just 15 per cent of respondents have “very favourable” view.

Positive perceptions of Germany have increased considerably since last year, with 44 per cent of Arab youth saying they have a “very favourable” view of that country, compared to 34 per cent in 2011.

Meanwhile, perceptions of major Asian powers continue to become relatively more favourable: 41 per cent of respondents now have a “very favourable” view of China, compared to just 27 per cent in 2011. “Very favourable” views of China are especially pronounced in Egypt (61 per cent), Iraq (58 per cent) and Libya (52 per cent)

Q: HOW FAVOURABLE ARE YOU TO THE FOLLOWING COUNTRIES?



The UK is now held in lower esteem than it was last year, with just 34 per cent of young Arabs expressing a “very favourable” view of the country; likewise, views of the US are less favourable than they were one year ago, with 31 per cent of respondents viewing that country “very favourably,” compared to 41 per cent in 2011.

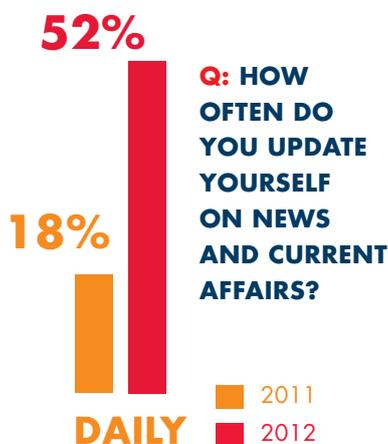
Likewise, India is viewed more favourably, with 28 per cent of Arab youth holding a “very favourable” view of the world’s second-most populous country, up from 25 per cent in 2011. Perceptions of India are especially positive in Egypt, where 42 per cent hold a “very favourable” view of that Asian nation, and Lebanon, where 34 per cent share that same sentiment.

10. NEWS CONSUMPTION SKYROCKETS, TV VIEWERSHIP DECLINES & BLOGS ARE BOOMING

After a period of enormous political change, Arab youth are following the news far more keenly than ever before – on television and via the Internet – and have developed a passion for the blogosphere.

Today, Middle East youth have dramatically increased their news consumption habits, with 52 per cent of regional young people now saying they update themselves on news and current affairs every day – up from just 18 per cent in 2011.

Young Tunisians and Omanis follow the news most closely, with 76 per cent in both countries saying they update themselves on current events on a daily basis, closely followed by youth in Bahrain, Kuwait and Saudi Arabia (75 per cent each).



While youth in the UAE follow the news least avidly, with 63 per cent saying they update themselves daily, that figure has more than doubled from 2011, when just 31 per cent said they updated themselves on current affairs every day.

Television remains the most important source of news for Arab youth, with 62 per cent of respondents saying their turn on the TV to get their news – but that number has declined from 79 per cent in 2011.

While fewer young Arabs may be watching television, it remains the most-

trusted news source, with 49 per cent of respondents saying that TV news channels are the news source they trust most, a significant decline compared to 60 per cent in 2011.

Over the same period, daily newspapers have witnessed a massive decline in popularity among regional youth, with just 32 per cent of respondents saying they get their news from newspapers, compared to 62 per cent last year. Meanwhile, print magazines appear to be becoming less relevant, with just 6 per cent saying they get news from magazines, compared to 17 per cent in 2011.

More young people in the Middle East than ever before find the news they need online, with 51 per cent saying they get their news on the Internet, up from 42 per cent in 2011; however, trust in online news sources remains low, at just 18 per cent, up from 11 per cent last year.

This trend is in line with increased Internet usage among Arab youth, 82 per cent of whom say they now generally use the Internet on a daily basis, up slightly from 80 per cent in 2011. Daily Internet usage is highest among young people in Saudi Arabia (91 per cent), the UAE (87 per cent) and Libya (86 per cent), while it is lowest among youth in Oman (77 per cent), Kuwait (78 per cent) and Egypt and Tunisia (79 per cent each).

At a time when Internet usage continues to increase, online activities among Middle East youth have evolved significantly since the start of the Arab Spring: today, reading or writing blogs is the top online activity among young people in the region, with 61 per cent saying they engage with blogs, up from only 29 per cent in 2011.

Blogging is most popular among youth in Jordan, where 87 per cent say they actively read or write blogs, followed by Kuwait (83 per cent), Iraq (82 per cent) and Qatar (81 per cent).

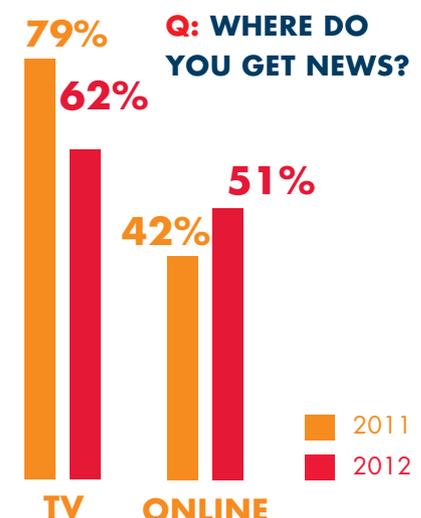
Listening to music is the second-most-

common online activity, at 58 per cent, down from 66 per cent in 2011, followed closely by social networking (56 per cent), which is most popular among young Egyptians, 81 per cent of whom say they frequently visit Facebook and similar sites, followed by Jordan (63 per cent) and Iraq, Kuwait and Oman (61 per cent each).

Though introduced to the region relatively recently, Twitter is clearly making strong inroads; 16 per cent of regional youth say they now regularly Tweet or follow the micro-blogging site, a significant increase from 8 per cent in 2011. Saudi youth are the most active on Twitter, with 54 per cent saying they are regular users, followed by their peers in Egypt (40 per cent) and the UAE (29 per cent).

Across the region, young people say that they primarily follow Twitter users from their own country (92 per cent) or from the Middle East region (67 per cent) – with just 13 per cent saying they follow Twitter users from the West.

Not surprisingly, Arab youth, like their peers elsewhere, primarily use Twitter to connect with people they already know: among young Twitter users in the Middle East, 86 per cent say they follow friends, 45 per cent say they follow celebrities and 21 per cent say they follow journalists.



About ASDA'A Burson-Marsteller:

Established in 2000, ASDA'A Burson-Marsteller is the region's leading public relations consultancy, with 11 fully-owned offices and seven affiliates across the Middle East and North Africa. A WPP company within the global Burson-Marsteller network, ASDA'A Burson-Marsteller is a member company of the MENACOM Group.

The agency provides services to governments, multinational businesses and regional corporate clients through its seven practices in the sectors of Technology, Corporate, Finance, Healthcare, Consumer Marketing, Public Affairs, and Energy & Environment. Its services include reputation management, crisis & issues management, digital communications, media relations, media monitoring & analysis, and event management.

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MENACOM, part of WPP and Y&R Group, with headquarters in Dubai, is the Middle East and North Africa region's leading communications conglomerate. The group includes, in addition to ASDA'A Burson-Marsteller, advertising agencies Young & Rubicam, Intermarkets and Partnership; direct marketing specialists Wunderman; media specialist firm MEC; and interactive firm Tattoo. With over 1,200 employees in its network of 57 offices, MENACOM provides marketing communications services in 17 countries across the Middle East and North Africa.

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Penn Schoen Berland (PSB), a member of Young & Rubicam Group and the WPP Group, is a global research-based consultancy that specialises in messaging and communications strategy for blue-chip political, corporate and entertainment clients.

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**For further information,
please contact:**

ASDA/A Burson-Marsteller
4th Floor, Block A
The Gateway Building
Dubai Media City
P.O. Box 28063
Dubai, UAE
Tel: 971-4-4507600
Fax: 971-4-4358040
Email: info@asdaa.com
www.asdaa.com
www.arabyouthsurvey.com