

# LIVING A NEW REALITY

## Emerging Themes

---

**My Global Citizenship**

**My Politics**

**My Livelihood**

**My Identity &**

**My Aspirations**

A report on the findings of the 15th annual ASDA'A BCW Arab Youth Survey 2023

Published in 2023 by ASDA'A BCW

A digital copy of this report can be obtained from the ASDA'A BCW Arab Youth Survey website: [arabyouthsurvey.com](http://arabyouthsurvey.com)

Copyright © 2023 ASDA'A BCW  
[asdaa-bcw.com](http://asdaa-bcw.com)  
[arabyouthsurvey.com](http://arabyouthsurvey.com)

*All rights reserved*

*No part of this document may be reproduced in any form or by any means without the written permission of ASDA'A BCW.*

*ASDA'A BCW and ASDA'A BCW Arab Youth Survey logos are trademarks of ASDA'A BCW. Other company, product and service names may be trademarks or service marks of their respective owners.*

**The ASDA'A BCW  
Arab Youth Survey  
2023 is dedicated to  
the Arab world's over  
200 million youth**

**Special thanks to:**

Proof Communications for design and production of this report  
and SixthFactor Consulting for research support



## Contents

### About the survey 06

The largest study of its kind of the Arab world's largest demographic - its over 200 million youth

### Methodology 07

Analysis of data from face-to-face interviews with 3,600 young Arabs in 53 cities across 18 Arab states

### Timeline 08

Key events in the Arab world from Oct. 2022 to April 2023

### Emerging Themes 10

#### My Global Citizenship 13

Youth perspectives on the shifting geopolitical landscape, US involvement in the region, ongoing conflicts and model nations

#### My Politics 31

How young Arabs feel about the performance of their government, the political stability of their country and prospects for democracy

#### My Livelihood 39

What young Arabs say about education, jobs, their finances, and their ambitions to start a business

#### My Identity 49

Arab youth attitudes on religion, their concerns about the loss of traditional values, and what defines their personal identity

#### My Aspirations 57

The outlook of Arab youth on the direction in which their country is headed, their hopes for the future and their desire to emigrate

#### Socio-economic indicators 66

Social, economic and social media indicators of the 18 Arab states surveyed

### About us 67

## THEME TO BE UNVEILED

### My Lifestyle

What are the lifestyle choices of Arab youth? How do they consume news? Which social media channels do they prefer? And what are they buying online?

## Commentaries

### Giving Arab youth a voice for the past 15 years 04



#### Sunil John

Our rationale for conducting this pioneering survey every year is clear: accurate insights about the hopes and aspirations of Arab youth lead to carefully considered policies and social and economic conditions in which they can thrive



### Arab youth will be the first to live with a new multipolar reality 28

#### Faisal Al Yafai

A new, more global citizenship will not emerge overnight. But the shoots of it are already apparent in how young Arabs view this emerging world

### Old Concerns, New Aspirations: Transformed attitudes for a transforming world 36



#### Dr. Jihad Azour

With more than 100 million young people expected to reach working age in the next ten years, now is the time to change the Arab world's engine of growth to navigate the challenges and opportunities of a quickly evolving world.



### The growing hope gap across the region must be bridged 46

#### Afshin Molavi

The message of young Arabs is loud and clear. They simply want a decent opportunity to thrive, a level playing field where they can utilise their talents

### Religion and tradition emerge as popular anchors for Arab youth 64



#### James M. Dorsey

The difference between the Gulf and the rest of the Arab world is that GCC youth are more confident than their Levantine and North African counterparts that their governments will deliver jobs and opportunities.

## Introduction

# Giving Arab youth a voice for the past 15 years



### Sunil John

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.

In November 2008, when ASDA'A BCW launched its first annual Arab Youth Survey, the world was living through a period of dramatic change.

President Barack Obama was about to start his first term and the mood was one of hope after years of war in Iraq and Afghanistan.

But just as he was about to take office, the global financial crisis struck, and its aftershocks soon reverberated around the world, from Wall Street to Main Street, and on to the Arab Street.

In the decade before the downturn, the Arabian Gulf nations had enjoyed an economic boom. The city of Dubai in the United Arab Emirates was synonymous with these heady days, labelled by some Western observers as the 'City on the Hill' and a 'Beacon of Hope' in a region more readily associated with conflict and civil unrest.

In other Middle Eastern countries, however, long-standing enmities had worsened. The Palestinian-Israeli crisis had deepened. Iraq had been battered by a wave of insurgent attacks. Libya, Egypt, Tunisia and Yemen were restive.

#### The Arab youth dividend at risk

Amidst a rising tide of public dissatisfaction, populist movements were gaining ground, in Egypt, Tunisia and other Arab countries, although they were largely ignored, or unseen, by most policymakers and the international media.

However, the risk of the Middle East losing its precious 'youth dividend' was clearly visible to us at ASDA'A BCW, the region's leading communications consultancy.

While UN data pointed to double-digit youth unemployment rates, reliable attitudinal research was lacking. The need to create 100 million jobs was a much-debated topic on the conference circuit, but youth themselves were rarely part of the conversation.

That was when we saw the critical need for a survey that attempted to understand the hearts and minds of Arab youth, the Middle East's largest demographic. Around 60% of the Arab world's population, some 200 million young men and women, are below the age of 30. In 2008, we launched the annual ASDA'A BCW Arab Youth Survey to give them a voice.

Our rationale was clear: accurate insights lead to carefully considered policies and social and economic conditions in which youth can thrive.

#### Predicting the Arab Spring

The first ASDA'A BCW Arab Youth Survey on the hopes, concerns and aspirations of young men and women aged 18 to 24 was well received. However, the real significance of our research would become apparent a year later, when we announced that the top priority of Arab youth was living in a democratic country. They also demanded better access to quality education, a fair wage, and safer communities.

The following December, Tarek el-Tayeb Mohammed Bouazizi's self-immolation sparked the overthrow of the Tunisian government and the onset of regime change in Tunisia, Egypt, Libya and Yemen. The Arab Spring changed the Arab world forever, and the rest of the world along with it.

The perception of our annual study was also transformed. Having accurately identified the factors behind the most significant upheaval in the Middle East for a generation, the annual ASDA'A BCW Arab Youth Survey became a respected bellwether of Arab youth opinion.

**Mapping evolving priorities**

Each year, our study throws a spotlight on the outlook of the Arab world's largest demographic, their shifting mindset, and evolving priorities. In 2012, fair pay and home ownership were deemed more important than living in a democracy. In 2013, a new spirit of optimism had taken hold, with the majority of those surveyed convinced their best days lay ahead.

In 2014, we found that confidence in government had risen. Two years later, however, less than half of Arab youth said they trusted their national government to manage surging terrorism and the threat of ISIS (Daesh).

In 2017, our study observed waning youth optimism and a growing divergence in the views of youth in the oil-rich Gulf Cooperation Council (GCC) states and those in the conflict-stricken countries of North Africa and the Levant.

The consensus in 2018 was that the Arab world was drifting off course. Once again, young men and women across the region were demanding urgent action on jobs, education, corruption, and Islamic extremism. The call for reform grew even louder in 2019, with even religious institutions coming in for criticism.

In 2020, the year of the COVID-19 pandemic, confidence was arguably at its lowest ebb, with nearly half of Arab youth surveyed saying they had considered emigrating from their country. There were also heightened fears that a prolonged shut-down would lead to further political unrest, as our one-off Pulse Survey at the peak of the crisis indicated.

Predictably, in 2021, with the danger of COVID-19 starting to recede, our survey documented the renewed confidence of Arab youth. The following year, the yearning of Arab youth for stability – to chart a new course after a decade of uncertainty and upheaval – was unmistakable. In fact, it was

even stronger than the desire of Arab youth for democratic change, a striking reversal in attitudes since 2009.

**The rise of Gen Z**

Significantly, all our sample in this year's Arab Youth Survey belong to the post-Millennial generation born after 1997, also known as Generation Z. They are coming to terms with the events of the past 15 years: the civil wars in Syria, Libya and Yemen, the rise and fall of ISIS (Daesh), the COVID-19 pandemic, near all-time high unemployment, accelerating digitalisation, and the existential threat of climate change.

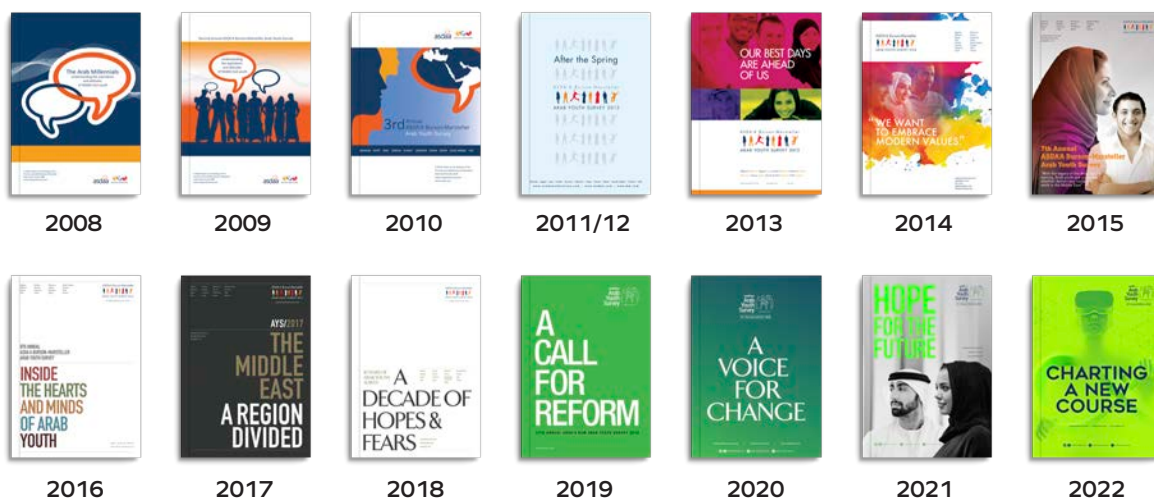
What shines through is the sense that today's generation of Arab youth are Living a New Reality – the overarching theme of this year's survey – where geopolitical allegiances are realigning, where attitudes to the region's long-standing conflicts are diverging, and where perspectives on what constitute a 'model nation' are becoming more nuanced.

For our 15th annual ASDA'A BCW Arab Youth Survey, we have decided to release the findings in stages under separate themes: My Global Citizenship, My Politics, My Livelihood, My Identity, My Aspirations, and My Lifestyle. This is because, as many of you told us, the volume of data we collect each year is now simply too large to be published in a single launch.

Accordingly, we launched the findings under the first of our six themes, 'My Global Citizenship' on June 20, 2023. 'My Politics' and 'My Livelihood' followed in July; and we now have the findings from 'My Identity' and 'My Aspirations.'

As I reflect on the first 15 years of the ASDA'A BCW Arab Youth Survey, it is astonishing to me that we have conducted nearly 45,000 face-to-face interviews across the Arab world to date, and now reach 18 Arab states. This is an incredible source of knowledge and data, which we fund entirely ourselves and make freely available to all.

We will continue to provide Arab youth a voice through our survey. As the region charts a course toward a more peaceful and sustainable future for the Middle East and the world, it is incumbent upon us all to listen to them.



## About the survey

# 15th annual ASDA'A BCW Arab Youth Survey 2023

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, business strategy and emerging trends.

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

<b>3,600</b>	face-to-face interviews across 53 cities in 18 Arab states	Country nationals aged between <b>18-24 years</b>	Sample split <b>50:50 male/female</b>
Why we do face-to-face interviews	<b>To maximise the accuracy of the research and to reflect the nuances of Arab youth opinion</b>	Survey was conducted from	<b>March 27 to April 12, 2023</b>

## Field survey covering 3 regions

<b>GCC</b> Bahrain, Kuwait, Oman, Saudi Arabia and the UAE	<b>Levant &amp; Others</b> Iraq, Jordan, Lebanon, Palestinian Territories, Syria and Yemen	<b>North Africa</b> Algeria, Egypt, Libya, Morocco, Sudan, Tunisia, and South Sudan (added new this year)
---	---	--



## Methodology

The 15th annual ASDAA BCW Arab Youth Survey 2023 was conducted among Arab youth across 53 cities in 18 states in the Middle East and North Africa.

The survey was conducted from March 27 to April 12, 2023, covering 3,600 young Arabs – the largest sample to-date – through face-to-face interviews conducted by professional interviewers of SixthFactor Consulting, a leading research company. The interviews were conducted face-to-face rather than online to maximise the accuracy of the research.

The interviews were completed in Arabic and English with young Arab men and women, exclusively nationals in each state. The sample split was 50:50 male/female. The countries and gender were weighted equally following international polling criteria, with a margin of error of plus or minus 1.63%.

The survey covered five of the Gulf Cooperation Council states (Bahrain, Kuwait, Oman, Saudi Arabia and the UAE), North Africa (Algeria, Egypt, Libya, Morocco, Sudan and Tunisia with

South Sudan added new this year), and the Levant (Jordan, Iraq, Lebanon, Palestinian Territories, Syria and Yemen).

The geographic location of respondents was considered when developing the fieldwork methodology with, for example, 40% of UAE respondents in Abu Dhabi, 40% in Dubai and 20% 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.

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%)				

Added in 2011	Added in 2012		Added in 2013			Added in 2014	Added in 2020		Added new in 2023
Iraq	Tunisia	Libya	Algeria	Morocco	Yemen	Palestinian Territories	Syria	Sudan	South 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%)	Juba (50%)
Irbil (25%)	Sfax (25%)	Misrata (25%)	Oran (25%)	Fes (25%)	Al Hudaydah (25%)		Latakia (25%)	Port Sudan (25%)	Malakal (25%)
Basrah (25%)	Susah (25%)	Benghazi (25%)	Constantine (25%)	Rabat (25%)	Ta'izz (25%)	West Bank (50%)	Aleppo (13%)	Al Obeid (25%)	Wau (25%)
			Marrakech (25%)				Homs (12%)		

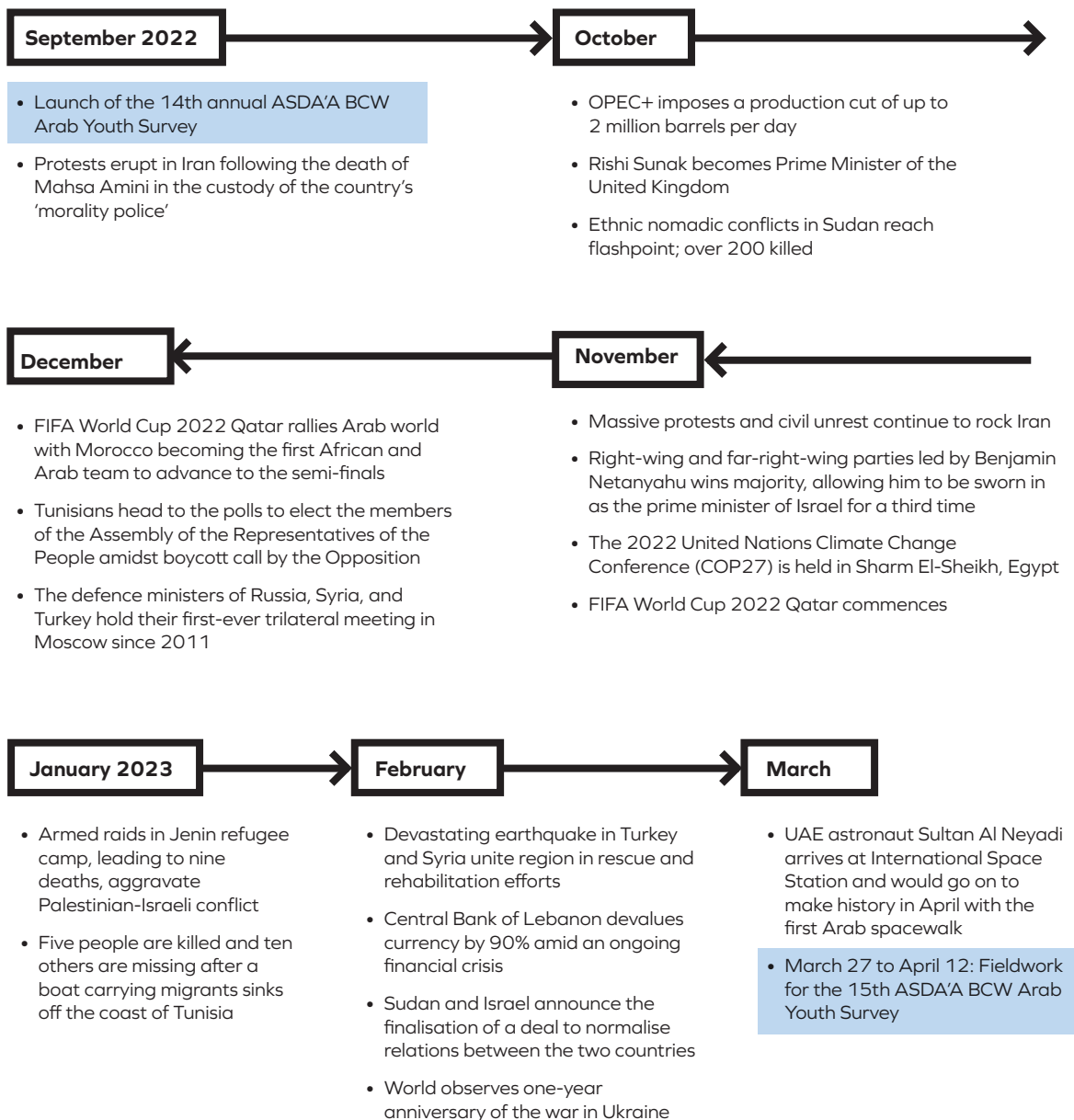
Countries and gender were weighted equally.

## Timeline

### Timeline of events from October 2022 to April 2023

To give additional context to the findings of the survey, it is important to understand the geopolitical and social landscape of the region prior to and during the survey. Some of the key events

in the Arab world and internationally that might have had an influence on the respondents, are below. These are in addition to the ongoing war in Ukraine and its impact on oil prices.





## Emerging Themes

---

The 15th annual ASDA'A BCW Arab Youth Survey identified six emerging themes to define the hopes, attitudes and aspirations of the region's largest demographic.

The survey findings under each theme were launched in a phased manner. The report covers the first five themes.

<h1>1</h1>	<h2>MY GLOBAL CITIZENSHIP</h2>
	Presenting youth perspectives on the shifting geopolitical landscape, US involvement in the region, ongoing conflicts and model nations.

<h1>2</h1>	<h2>MY POLITICS</h2>
	How young Arabs feel about the performance of their government, the political stability of their country and prospects for democracy.

<h1>3</h1>	<h2>MY LIVELIHOOD</h2>
	Covering what young Arabs say about education, jobs, their finances, and their ambitions to start a business.

---

  
**4****MY IDENTITY**

Arab youth attitudes on religion and the role of religious institutions in Middle East society, their concerns about the loss of traditional values, and what defines their personal identity.

**5****MY ASPIRATIONS**

The outlook of Arab youth on the direction in which their country is headed, their hopes for the future and their desire to emigrate.

**6****MY LIFESTYLE**

Highlighting the lifestyle choices of Arab youth. How do they consume news? Which social media channels do they prefer? And what are they buying online?



## MY GLOBAL CITIZENSHIP

---

## CHANGING ALLEGIANCES

---

Arab youth value both traditional and new alliances, while old enmities remain. The UAE continues to be universally admired.

# Emergence of a new multipolar reality

Recent years have seen Arab countries expand their traditional sphere of influence and establish new relationships. The normalisation of ties between Israel, the United Arab Emirates, Bahrain and Morocco, under the historic Abraham Accords, is clear evidence of this trend. Former imperialist nations like the United Kingdom and France, and modern-day powers like the United States and Russia, have seen their own relationships with the Arab world change as a result.

Foreign Affairs magazine went so far as to describe this geopolitical shift as the “End of the Middle East” in a recent editorial. “Since the early years of the Cold War,” it wrote, “the Washington establishment

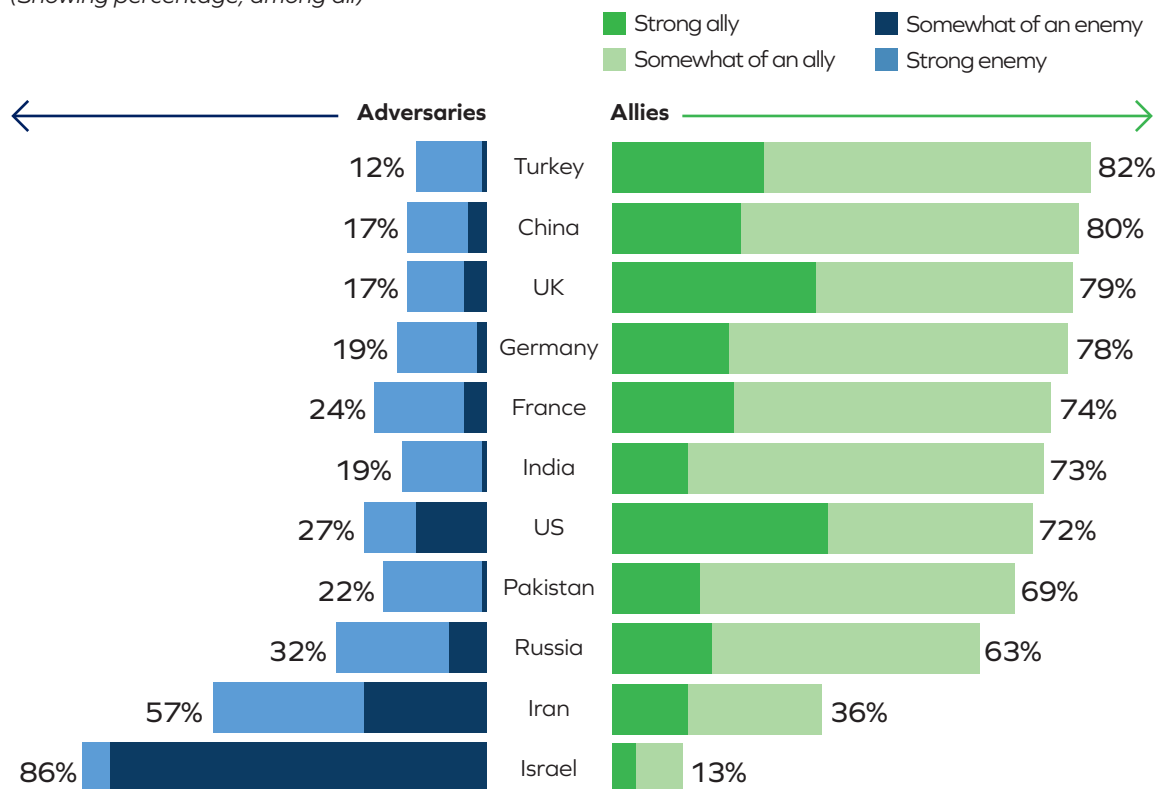
has viewed the Middle East as the Arab world - broadly conceived as the member states of the Arab League plus Iran, Israel, and Turkey. But such a map is increasingly outdated. Leading regional powers operate outside the traditional Middle East in much the same way as they operate inside it, and many of the rivalries most important to the region now play out beyond those assumed borders.”

The outlook of young Arabs appears to mirror this new reality, according to the findings of the 15th annual ASDA'A BCW Arab Youth Survey, the largest survey of its kind of the Arab world's largest demographic - its 200 million-plus youth.

## Turkey and China now rival traditional allies like the United States and the UK

Do you consider the following countries a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of YOUR country?

(Showing percentage, among all)



(Not including 'Don't know')



### New allies, old enmities

Today, while the traditional allegiances, and old enmities, of Arab youth remain strong, new allies are emerging. When asked to choose the countries they consider “a strong ally or somewhat of an ally” of their nation, the largest percentage of respondents (82%) named Turkey, followed by China (80%) and the United Kingdom in third (79%).

The United States was ranked seventh, with 72% of Arab youth saying it was a strong ally or somewhat of an ally, below Germany (78%), France (74%) and India (73%). Meanwhile, the perception of Russia,

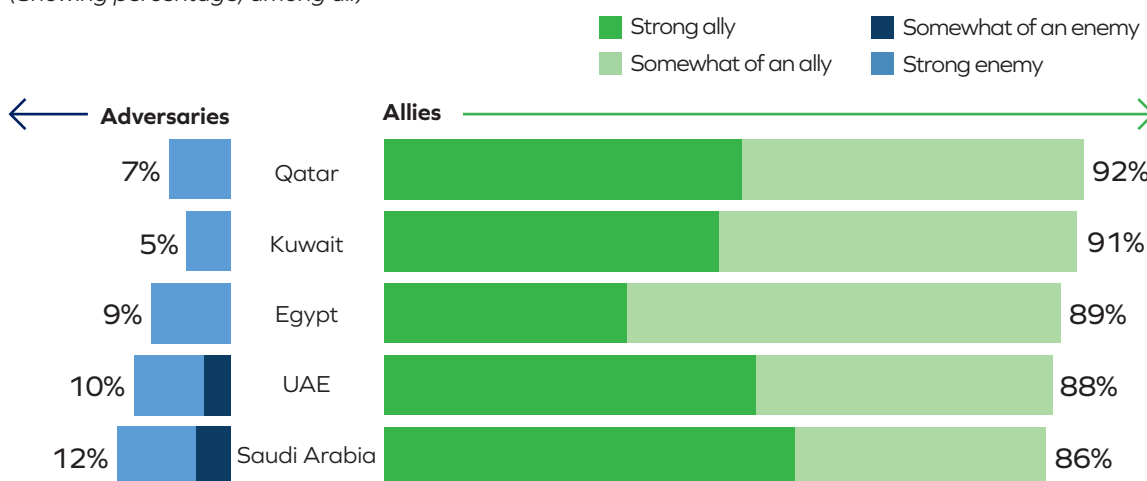
the third-highest ranking ally in last year’s study, appears to have been hit by the devastating war in Ukraine. Less than two-thirds (63%) of Arab youth describe it as a strong ally or somewhat of an ally, placing it in ninth position below Pakistan (69%).

Interestingly, although Turkey is viewed as an ally of their nation by most respondents overall, 37% of Arab youth rate the United States as a “strong ally”, compared with 26% who say that about Turkey. The United Kingdom also ranks higher than Turkey as a strong ally, at 35%, while less than a fifth (17%) say they view Russia as a strong ally.

### Among Arab nations, GCC countries and Egypt are widely regarded as strong allies

Do you consider the following countries a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of your country?

(Showing percentage, among all)



(Not including ‘Don’t know’)

### Strong camaraderie toward Arab nations

Meanwhile, a feeling of camaraderie would appear to characterise the attitudes of Arab youth toward other Arab countries. More than nine in 10 say Qatar is a “strong ally or somewhat of an ally” of their country, followed by Kuwait (91%), Egypt (89%), the UAE (88%) and Saudi Arabia (86%). Saudi Arabia is ranked the strongest ally overall, with 54% saying it is a “strong ally”, followed by the UAE.

Young Arabs were also asked about their views on Qatar hosting the FIFA World Cup 2022. An overwhelming 87% said the event had galvanised the Arab world and enhanced Arab pride, while an equal percentage said events such as the FIFA

World Cup and Expo 2020 Dubai have promoted greater understanding of the Arab world in general.

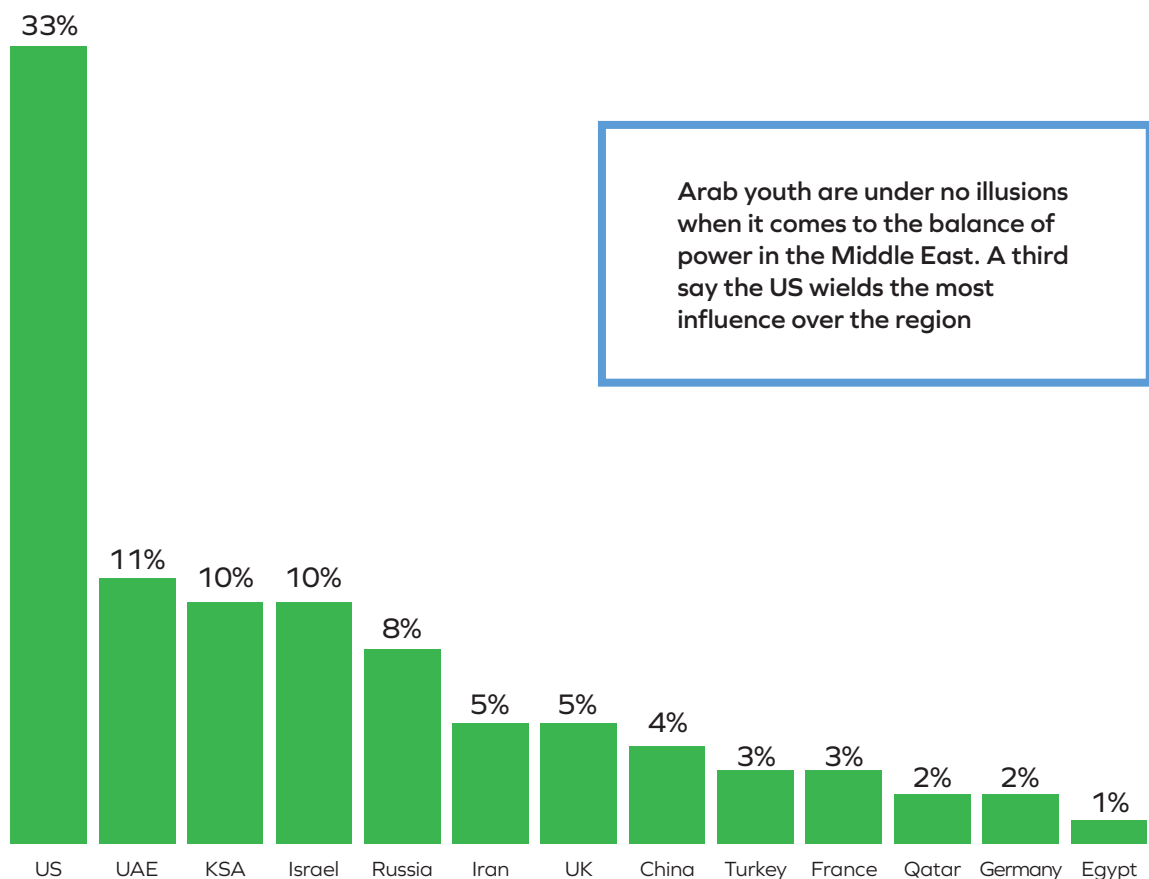
Russia’s reduced standing in the eyes of young Arab men and women could continue for some time, with a quarter of respondents saying the conflict in Ukraine won’t be resolved soon, although a slightly higher percentage (28%) believe a compromise will be reached through diplomatic negotiations.

**Events such as the FIFA World Cup and Expo 2020 Dubai have promoted greater understanding of the Arab world**

## The US continues to have the most influence over the region, followed by the UAE, Saudi Arabia and Israel

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

(Showing percentage, among all)



Arab youth are under no illusions when it comes to the balance of power in the Middle East. A third say the US wields the most influence over the region

### The US still holds the balance of power

Arab youth are under no illusions when it comes to the balance of power in the Middle East. A third (33%) say the US wields the most influence over the region, followed by the UAE (11%), and Saudi Arabia and Israel in joint third at 10%. Nearly two-thirds also say that they expect the US to be a stronger ally of their country than both Russia and China over the next five years.

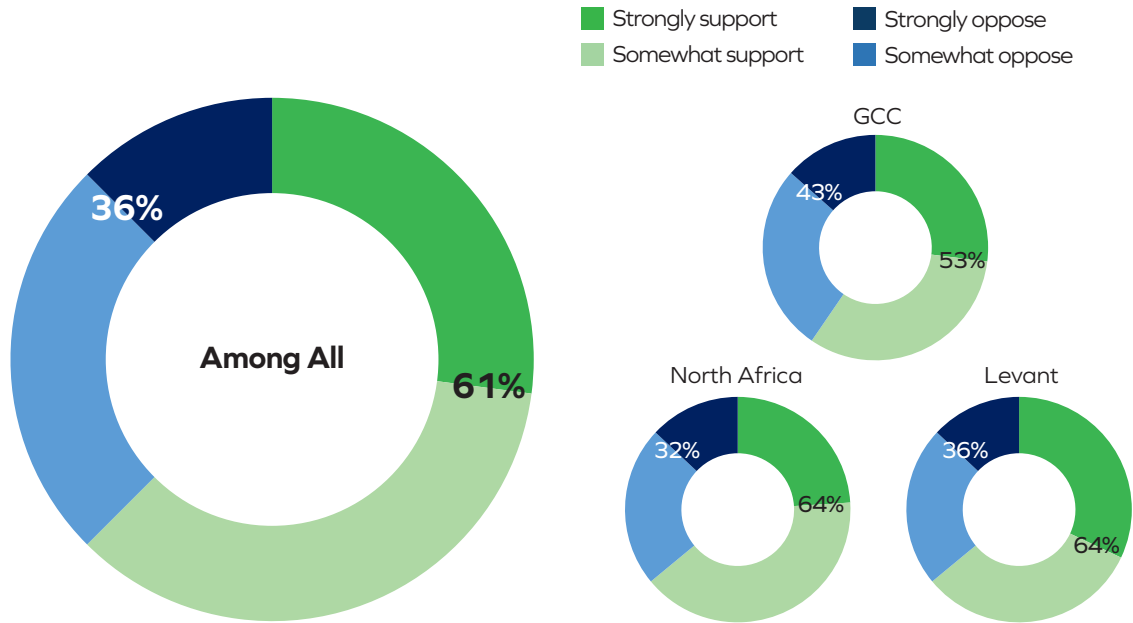
However, this doesn't necessarily translate into a desire for closer ties with the US. On the contrary, nearly two-thirds (61%) support the continued disengagement of the US from Middle Eastern affairs, a common position in all three regions surveyed – the GCC, North Africa and Levant.



## Most youth would like the United States to disengage from the Middle East

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

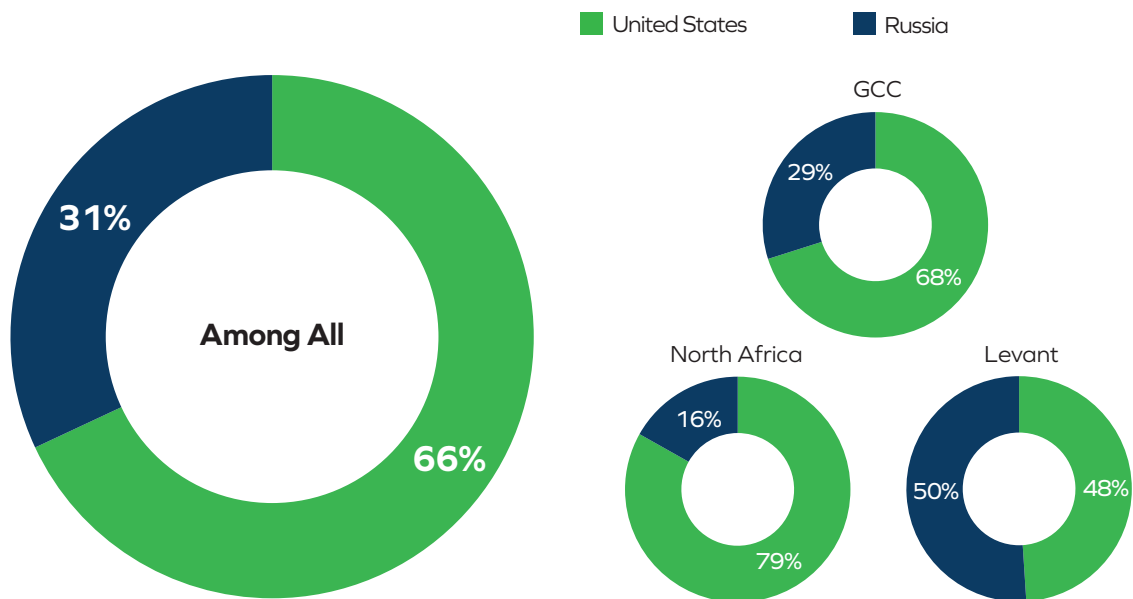
(Showing percentage, among all)



## Two-thirds say the US will be a stronger ally of their country than Russia over the next five years

Over the next five years, between the United States and Russia, which of the two countries do you think will be the more important ally of your country?

(Showing percentage, among all)

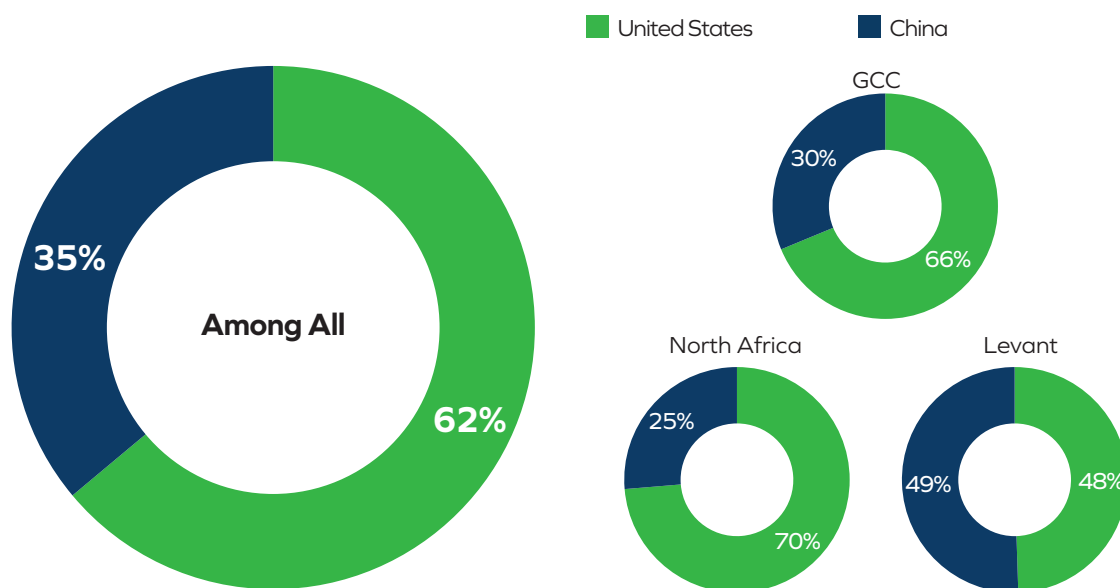


(Not including 'Don't know')

## Arab youth believe the US will be a stronger ally than China over the next five years

Between the United States and China, over the next five years, which of the two countries do you think will be the more important ally of your country?

(Showing percentage, among all)

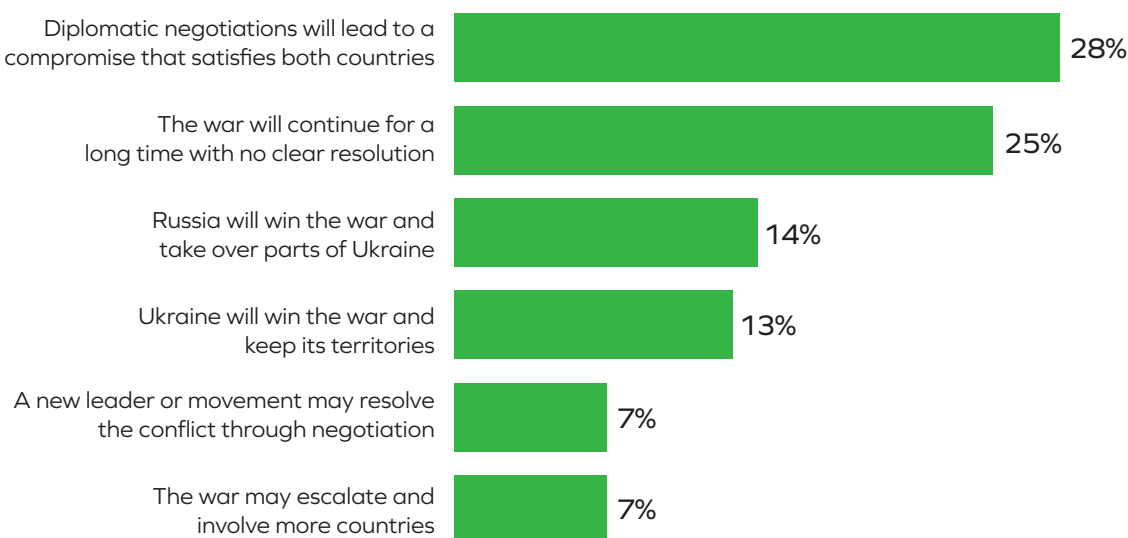


(Not including 'Don't know')

## More young Arabs think the war in Ukraine will ultimately be resolved through diplomatic negotiations

What do you think is the most likely outcome of the Russia-Ukraine war?

(Showing percentage, among all)



### **A divergence of views on closer ties with Israel**

While Israel remains a pariah in the eyes of many, this year's findings point to widespread acceptance of the new conditions ushered in by the Abraham Accords in those nations to have normalised ties with the country.

Nearly 17% of GCC citizens now see Israel as a strong ally or somewhat of an ally of their country, while 11% of North African youth say the same; these modest approval ratings would have been unthinkable several years ago. Three-quarters of Emirati and Egyptian youth "strongly support or somewhat support" closer ties with Israel, according to the research, as do 47% of South Sudanese youth and 30% of Bahraini youth.

In other parts of the region, however, old attitudes die hard, with 86% of Arab youth overall saying they regard Israel to be a "strong adversary or somewhat of an adversary" of their country, compared with 57% who view Iran in the same light.

More than half (53%) of Bahraini youth say they are strongly opposed to the normalisation of ties with Israel and 44% are against it in Morocco, another signatory to the Abraham Accords, although 50% are in favour.

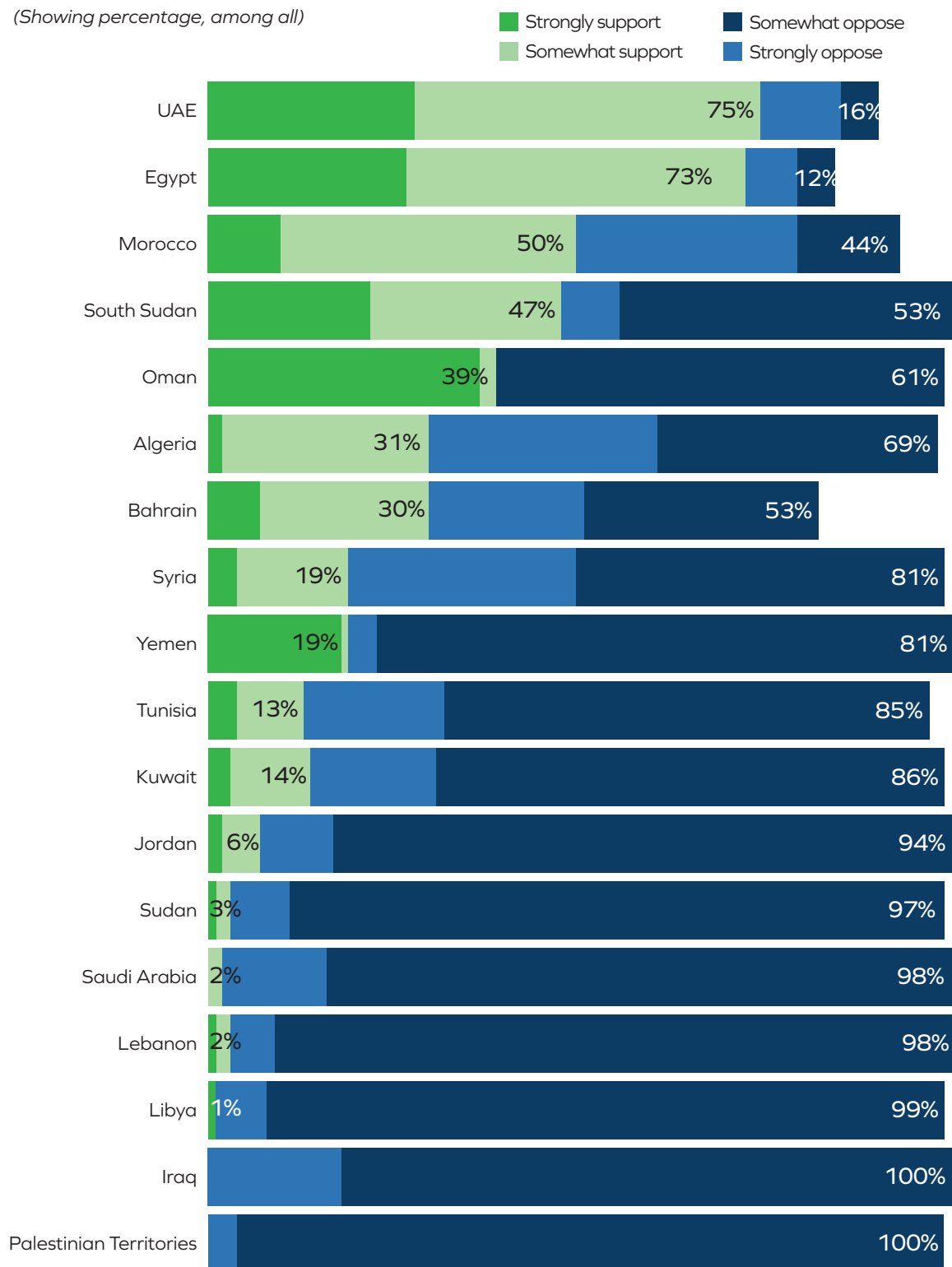
Opposition to Sudan's entry into the Abraham Accords is particularly strong among the country's youth, despite the lifting of US-imposed sanctions and US\$1.2 billion in financial aid following the deal. An overwhelming 97% of Sudanese youth oppose closer ties with Israel, a process which began in 2021 after the removal from office of the former president Omar Al-Bashir and was concluded in February by the country's military ruler Abdel Fattah Al-Burhan. The overwhelming majority of youth citizens in Saudi Arabia, Lebanon, Libya, Iraq and the Palestinian Territories are also dead against any deal with Israel.



## Most Arab youth oppose normalisation of ties with Israel, but those in the UAE, Egypt and Morocco strongly support it

How strongly do/ would you support or oppose your government's decision to normalise diplomatic relations with Israel?

(Showing percentage, among all)



(Not including 'Don't know')

**‘Tensions between Iran, Israel and the west will result in military conflict’**

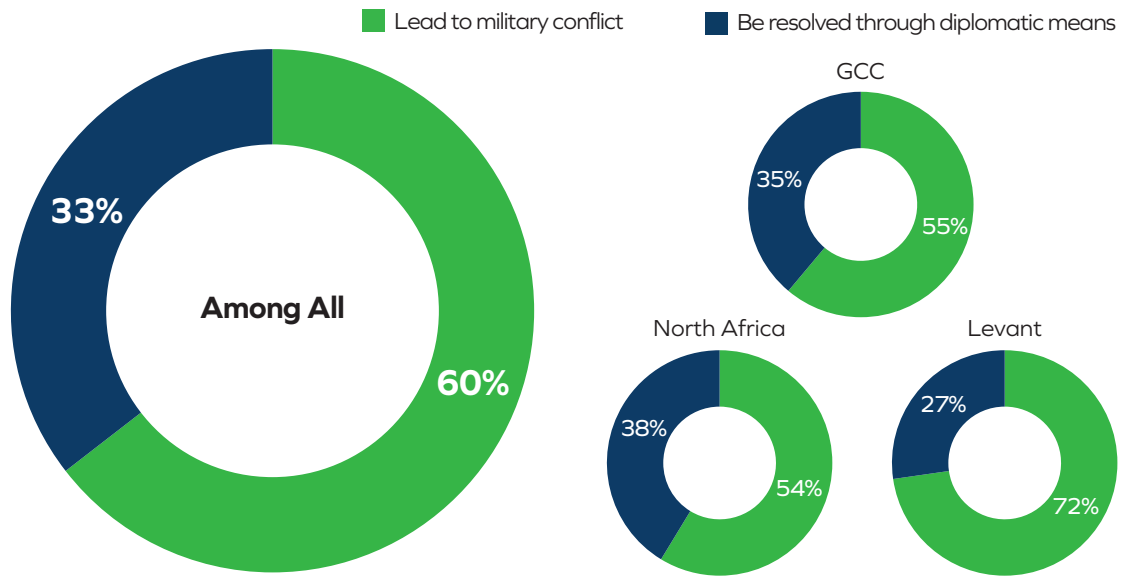
A deep air of pessimism hangs over relations with Iran, with 60% of Arab youth overall (rising to nearly three-quarters of respondents in Levant) saying that the tensions between Iran and Israel, and some Western countries, will eventually result in military conflict. Within the country itself, they say they expect the government to become even more authoritarian under the rule of religious conservatives, may witness more civil unrest and possibly a coup.

The strong fraternal ties with Arab nations notwithstanding, young Arabs are divided on the Palestinian-Israeli crisis. While two-thirds of respondents in the Levant and North Africa say the conflict is unlikely to be resolved within the next five years, nearly as many (60%) in the GCC are optimistic that a peaceful solution will be found. Many feel, however, that the issue is being sidelined, with a third overall (39%) saying the conflict does not get the attention it deserves from the Arab world; this percentage rises to 51% in the Levant countries.

**Most say tensions between Iran and Israel and the West will result in military conflict**

Which of the following is closer to your view?

**“The existing tensions between Iran and Israel and some Western countries will ultimately...”**  
 (Showing percentage, among all)

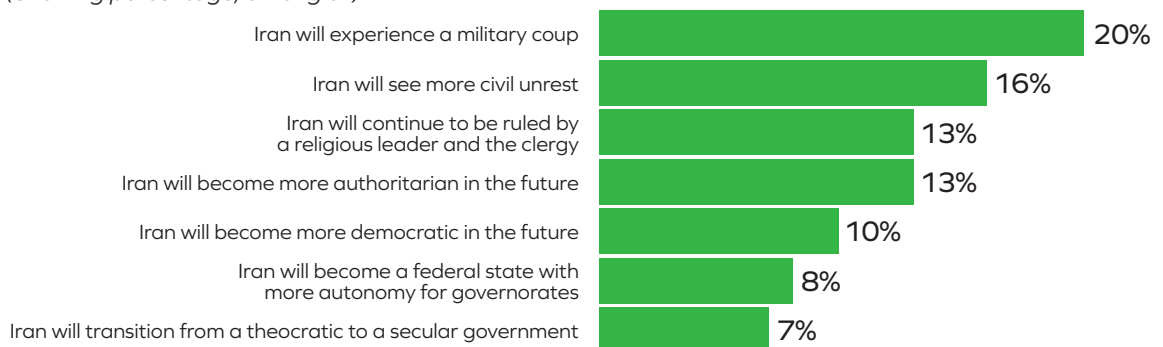


(Not including ‘Don’t know’)

**Over a third of Arab youth say Iran is heading towards more civil unrest, and possibly a military coup**

What do you think will be the future of government in Iran?

(Showing percentage, among all)

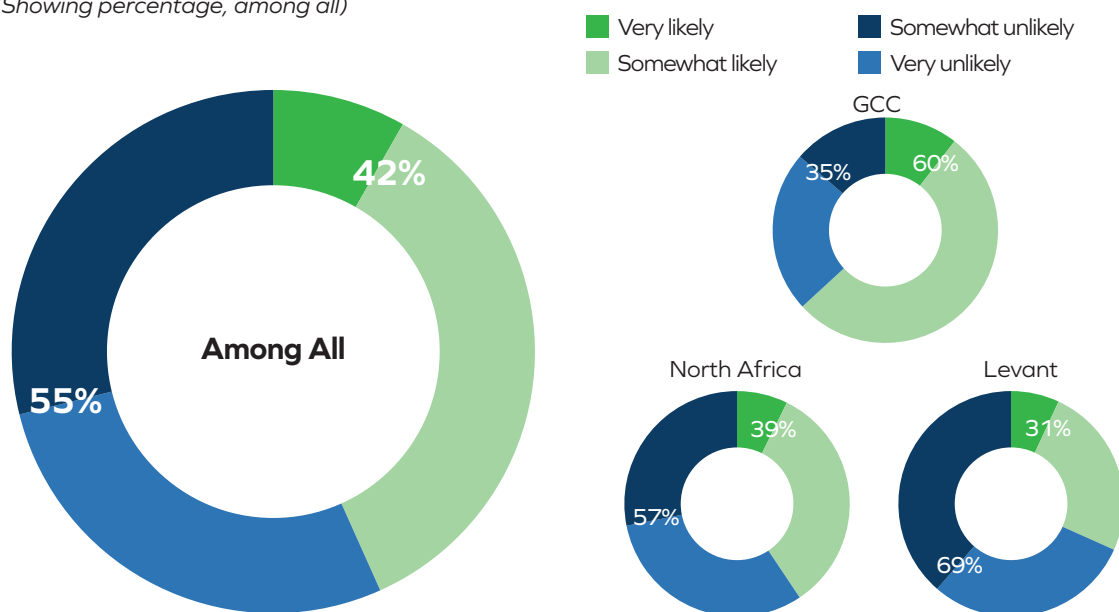




## Two-thirds of young Arabs in Levant and North Africa believe the Palestinian-Israeli conflict is unlikely to be resolved soon

Thinking about the Palestinian-Israeli conflict, how likely do you think will the conflict be resolved in the next five years?

(Showing percentage, among all)



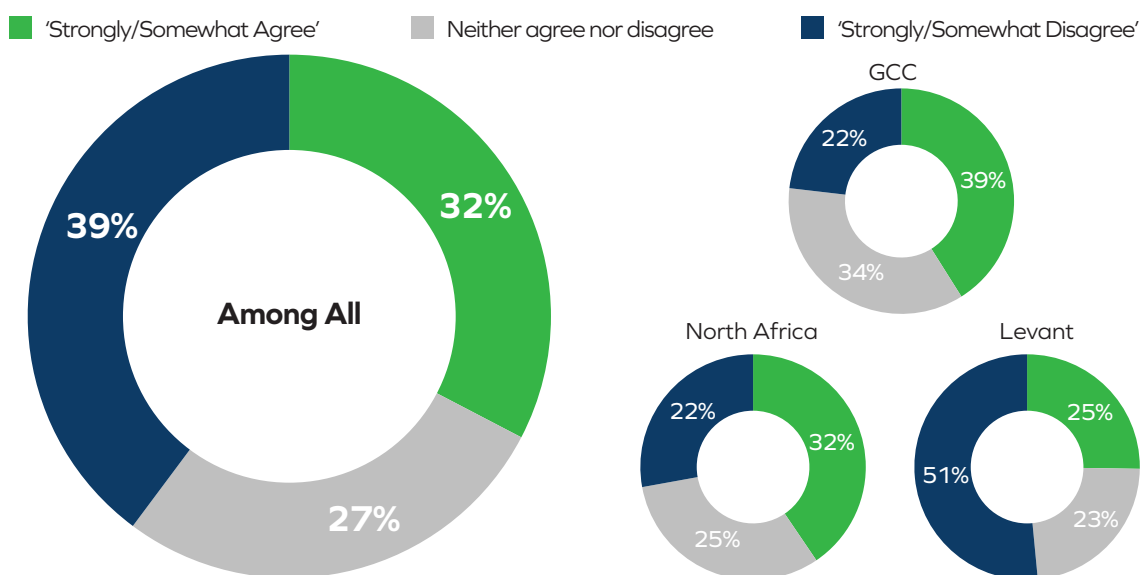
(Not including 'Don't know')

## Barely a third say the Palestinian-Israeli issue gets the attention it deserves from the Arab world

How strongly do you agree with the following statement?

"With growing national issues, I think the Arab world gives the Palestinian-Israeli issue adequate attention and focus."

(Showing percentage, among all)



(Not including 'Don't know')



---

### **UAE retains model nation status for 12th straight year**

A much happier finding is that the United Arab Emirates has retained its status as the country most young Arabs want to live in and their own country to emulate – for the 12th straight year.

Nearly a quarter of young Arabs surveyed across the 18 states said that the UAE was the country they most wanted to live in, followed by the United States (19%), Canada (19%), Qatar (14%) and the United Kingdom (13%). The US has mostly appeared in the top five since the question on model nations was first asked in 2013, however the UK returns after a three-year absence. Qatar's relatively high favourability ratings in the study would appear to reflect its successful hosting of the FIFA World Cup 2022.

Around a quarter of young Arab men and women (22%) named the UAE as the country they would most like their own to emulate, followed by the US (19%), Canada (16%) and Qatar (15%); Saudi Arabia and UK shared fifth spot (11%).

As in previous studies, Arab youth attribute the UAE's model nation status to a variety of factors, primarily its safe and secure environment (41%), growing economy (28%), effective and visionary leadership (24%), clean environment (22%), and the ease of starting a business (20%).

## Arab youth name the UAE as the country they would most like to live in for the 12th consecutive year

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

(Showing percentage from among all the top five countries)



24% UAE



19% US



19% Canada



14% Qatar



13% UK

Top 5 Countries to Live In										
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
France	France	US	US	US	US	Canada	Canada	US	US	US
US	US	UK	Germany	Germany	KSA	US	US	Canada	Canada	Canada
Turkey	Turkey	KSA	Canada	KSA	Canada	KSA	Turkey	UK	France	France
KSA	KSA	Qatar	Qatar	Canada	Germany	Germany	UK	Germany	Germany	Germany

## The UAE is also the country most Arab youth want their own to be like, also for the 12th straight year

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

(Showing percentage from among all the top five countries)



22% UAE



19% US



16% Canada



15% Qatar



Saudi Arabia 13% UK



Top 5 Countries to Live In										
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
US	France	US	US	US	US	US	US	US	US	US
France	US	Qatae	Germany	Germany	Canada	Canada	Japan	Germany	Canada	Canada
Turkey	Turkey	KSA	Canada	France	Germany	Japan	Turkey	Canada	Germany	Germany
China	China	UK	France	UK	KSA	Germany	Canada	Japan	France	France/ Turkey

## The UAE is praised for being safe, having a growing economy and effective leadership

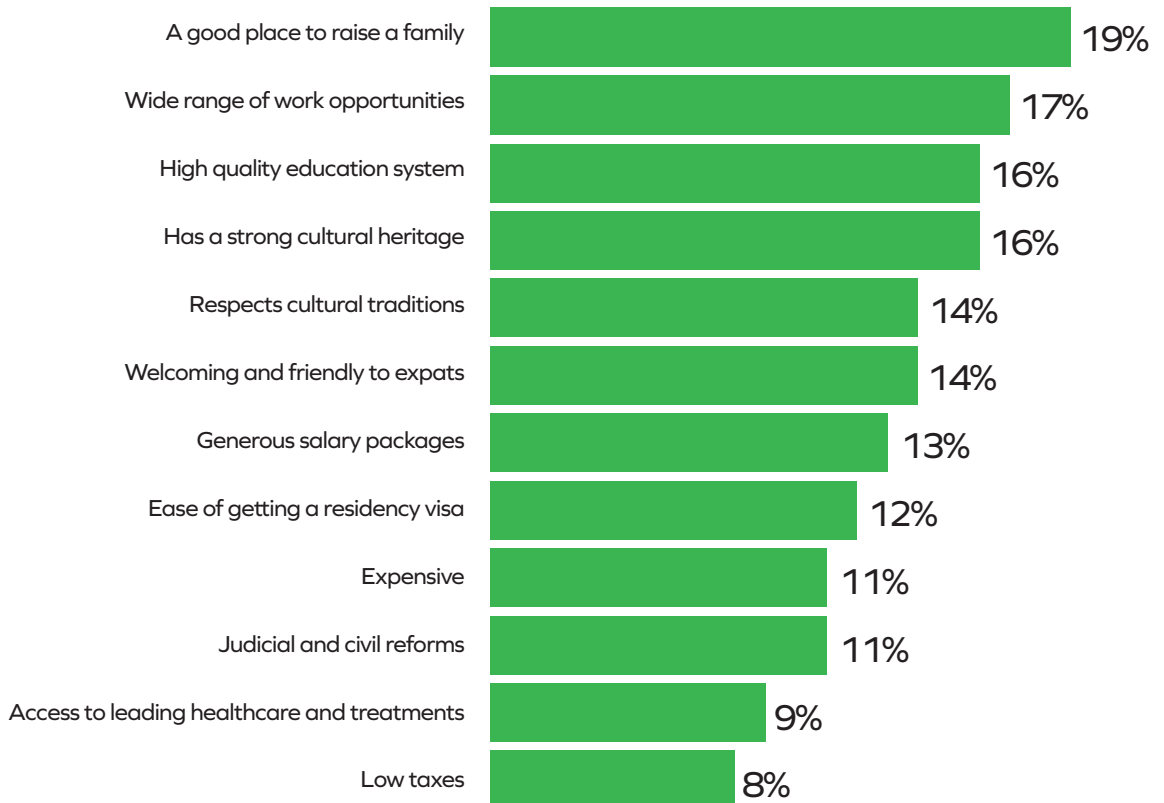
Now thinking specifically about the United Arab Emirates, which of the following phrases, if any, do you associate most strongly with the UAE?

*(Showing percentage from among all the top five countries)*

### Top five associations with the UAE



### Other associations with the UAE







## Arab youth will be the first to live with a new multipolar reality

### Faisal Al Yafai

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.

Living in a multipolar world will come about – as Ernest Hemingway said about going bankrupt – gradually, and then suddenly. The latest ASDA'A BCW Arab Youth Survey shows clearly that the Arab world is living through the “gradually” part of the process.

This shifting reality is already apparent, but it takes an effort to detect it as a trend. One of the outcomes of a long-established survey like the Arab Youth Survey is that, over time, trends that weren't immediately obvious become clearer through the data.

This year, one of the major findings is just how embedded a new, global multipolarity is. Looking at which countries Arab youth considered allies and which enemies throws up some intriguing answers.

At the top, more an ally than any other country outside the region, is Turkey, followed swiftly by China. The US, the UK and France are trending downwards. In microcosm, this shift reflects what is happening across the world, as the “rest” catch up with the “West”. As a region that straddles three of the major centres of the world, the Middle East was one of the first to feel its effects. As it develops, the Arab world, and of course Arab youth, will be the first to live with the reality of a multipolar world.

In some ways it is already becoming a reality – witness the China-brokered deal earlier this year to restore Saudi Arabia's relations with Iran.

But it's becoming a reality in other ways as well. While certainly true that the politics of Turkey's involvement in the region, as well as China's, play a role in the perception of

Arab youth, it's also the case that culture matters too. The two often go hand in hand. Turkey's cultural exports in film, television and music are avidly consumed by young Arabs. As for China, the country is becoming a vital source of tourists. Saudi Arabia, for example, which has a young population, plans to bring in more than 4 million Chinese tourists by the end of this decade. Such links change the perception of the country.

### A more complicated geopolitical landscape

This multipolarity will not look like the past, when the twin poles of the US and the Soviet Union existed during the Cold War. Instead, it will be more complicated.

Like most of the world, the Middle East lives with the extraordinary military dominance of the United States. Little wonder that the survey found America to be the country with the most influence over the region, by a wide margin.

That this influence is broadly considered negative is shown in a follow-up question, which found that a majority of Arab youth want the US to disengage from the region. (That belief was tempered in the GCC, with only a slim majority, 53%, wanting US disengagement.)

Yet, as always, the picture is more complicated. Look at two of the survey's findings.

First, asked to name which country young Arabs would most like to live in or have their countries emulate, a clear majority chose the UAE. (No surprise there: young Arabs

**Arab youth admire many things about the US, but also dislike its excessive involvement in the region. But it also highlights how countries that seek to rival the US in some spheres aren't interested in doing so in others. Neither China nor Russia wishes to supplant the US from the Middle East – yet in some spheres, they are rivals. An emerging multipolar world will be much harder to understand, and perhaps navigate.**

have said they admire the country ever since the ASDA/BCW Arab Youth Survey introduced the question in 2012.) But the second most popular country this year was the United States.

The reasons why the UAE topped the list offers indications as to why the US is respected. Among the top associations were safety, a growing economy and ease of doing business – all associations that could also apply to the United States. More evidence can be found in the question about which country will be a stronger ally. Here, there was a tilt towards the US, but only just.

Almost exactly the same percentage thought the US would be a stronger ally than Russia (66%) as thought the US would be a stronger ally than China (62%). Put another way, there was a preference for the US, but not much for Russia or China.

This demonstrates the messiness of multipolarity. Arab youth admire many things about the US, but also dislike its excessive involvement in the region. But it also highlights how countries that seek to rival the US in some spheres aren't interested in doing so in others. Neither China nor Russia wishes to supplant the US from the Middle East – yet in some spheres, they are rivals. An emerging multipolar world will be much harder to understand, and perhaps navigate.

#### **Allies and adversaries in focus**

In general, the allies and adversaries are mirror images of each other, with the country considered mostly an ally (Turkey) also ranking least as an adversary, and the country considered mostly an adversary (Israel) also ranking the least as an ally. But for two countries this isn't true, India and Pakistan, reflecting the more nuanced position these two Asian countries find themselves in vis a vis Arab youth – and perhaps also reflecting the long, deep and complex ties these two countries have with the Gulf States, with Iraq and with other countries.

If Arab youth still see other Arab countries as allies – and the strongest allies named by Arab nations were always other Arab nations – then the non-Arab countries of the Middle East occupy a more nuanced position. Of the three main non-Arab countries in the Middle East – Turkey, Iran and Israel – Turkey has the strongest position.

Iran and Israel, by contrast but not unexpectedly, are viewed in less flattering terms by Arab youth. In only three Arab countries is there more than 50% support for normalisation with Israel – Egypt, Morocco and the UAE – and in the majority of countries there is far less.

On Iran, a majority of Arab youth in every region believe there will be military conflict between Iran, Israel and the West. That the highest figure is in the Levant, where this proxy war is already playing out, shouldn't be a surprise. But the fact that North Africa, which is hardly a traditional battleground for Iranian-Israeli tensions, should score so highly is a surprise.

#### **An emerging global citizenship**

What will be the consequences of this shift to multipolarity, especially as it pertains to young Arabs? Some we've already touched on: an expanding cultural diet and political connections, which will no doubt lead to shifting work opportunities. The number of young Arabs learning Mandarin and taking jobs in Shanghai will certainly expand. I also expect a similar expansion of the number of Arabs learning Turkish – leading, no doubt, to thundering newspaper columns about "Ottoman" influence. In time, these changes will also shift the politics of the region, as the cultural influence stretches into political alignments.

But the major shift will be one of mindset. A world in which young Arabs consider countries beyond the Middle East and the West allies will also shift how they think of themselves. A new, more global citizenship will not emerge overnight. But the shoots of it are already apparent in how young Arabs view this emerging world. How they navigate it will be one of the most exciting aspects to observe.





## MY POLITICS

---

# CONFIDENCE IN GOVERNMENT IS DROPPING

---

Most Arab youth, except in the GCC, say their voice does not matter to their country's leadership and their government is unable to solve the issues most important to them

## Confidence in government: a contrasting picture

The second theme of the 15th annual ASDA'A BCW Arab Youth Survey, 'My Politics' evaluates the perceptions of young Arab men and women about their government.

What emerges is that most Arab youth, except in the GCC, feel their voice is not being heard by their country's leadership and that their government is unable to solve the issues most important to them.

Worryingly, this year's findings have parallels with the takeaways of our 2012 survey, which found intense frustration with the performance of Arab governments on such kitchen table issues as education, jobs and inflation.

We observed then that "the Arab Spring bloomed most vividly in countries where basic opportunities are most lacking... and that we can no longer afford to marginalise or disenfranchise Arab youth."

More than a decade later, little appears to have changed. As the Arab Public Administration Report by the World Government Summit noted in 2022, "the Arab region is in

dire need for an exceptional initiative that modernises government administration and brings about radical changes and sustainable reforms. It is especially necessary today as the region continues to face numerous complex challenges – persistently high unemployment rates, unsustainable financial conditions, and weak reform and development plans."

But what stands out from the survey is the stark divide in the perceptions of youth in the Gulf Cooperation Council (GCC) states compared with those of their counterparts in North Africa and Levant.

Over the years, GCC governments have placed an increasing emphasis on addressing the aspirations of their youth, devoting considerable resources to education reform and job creation.

This appears to have earned the admiration of young men and women across the Arab Gulf, with their views diverging strongly from those of their peers elsewhere in the region.



### Government in North Africa and Levant unresponsive to Arab youth

This is particularly evident in Arab youth's views on the responsiveness of their governments. When asked how strongly they agree or disagree that their voice matters to their country's leadership, less than half (46%) of the total respondents agreed, a significant drop of 19 percentage points over 2022. This feeling of estrangement, primarily driven by young people in North Africa and Levant, is also the most pronounced in five years.

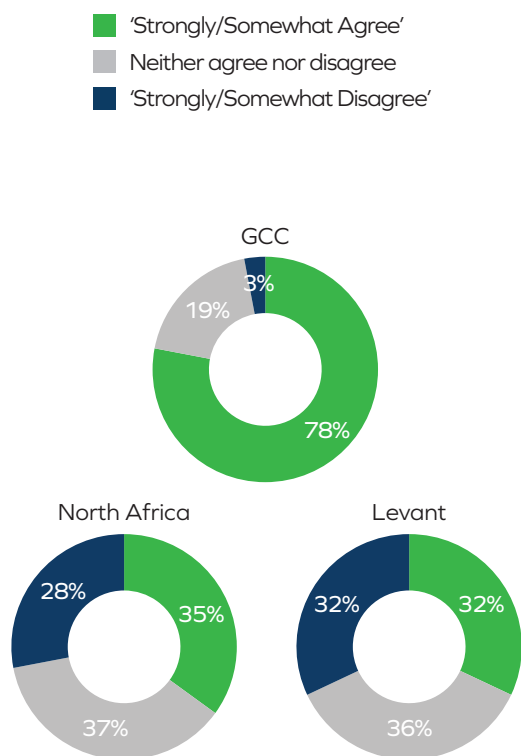
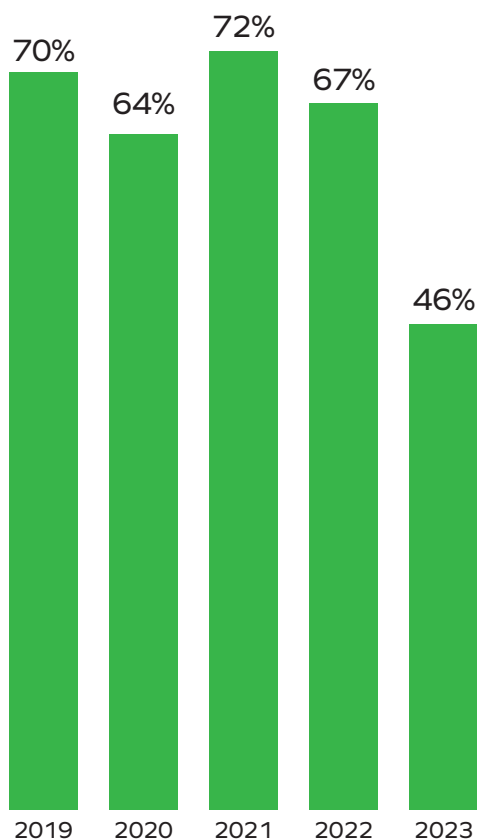
On the contrary, more than three-quarters (78%) of Arab youth in the GCC states affirm their voice matters to their leadership, compared with just 35% of youth in North Africa and 32% in the Levantine countries surveyed.

At the same time, more than a third of young Arab men and women in North Africa and Levant are ambivalent – neither agreeing nor disagreeing that their voice matters to their country's leadership.

### Less than half say their voice matters to their country's leadership, a significant drop from 2022

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

(Showing percentage strongly agreeing)

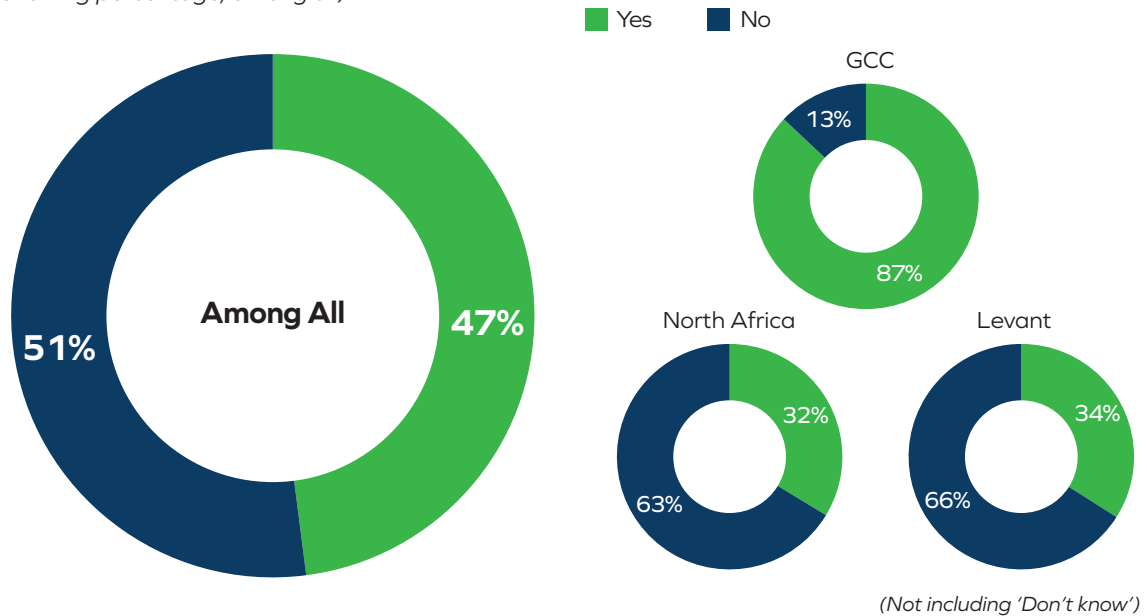


(Not including 'Don't know')

## Over two thirds of youth in North Africa and Levant say their governments do not have the right policies to address their most important concerns

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

(Showing percentage, among all)



### GCC governments showing the way on policy

Over half (51%) of the respondents in the study also said their government did not have the right policies to address the issues most important to them, while young GCC nationals had the opposite view.

A full 87% of GCC youth said their government had the right policies, while two-thirds of youth in North Africa and the Levant said the policymaking of their government was

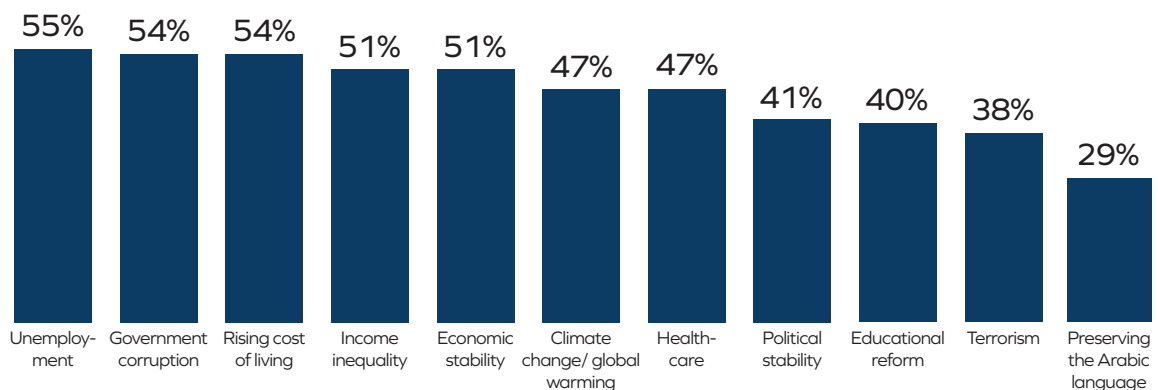
falling short, particularly on issues such as unemployment, government corruption and rising living costs.

Unsurprisingly then, over half (52%) of Arab youth say their country is going in the wrong direction, with the outlook most negative in North Africa (61%) and Levant (71%). Young GCC citizens, on the other hand, are extremely optimistic about the future, with a rousing 83% saying their country is headed in the right direction.

## Most young Arabs lack confidence in their government to tackle unemployment, corruption and rising living costs

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

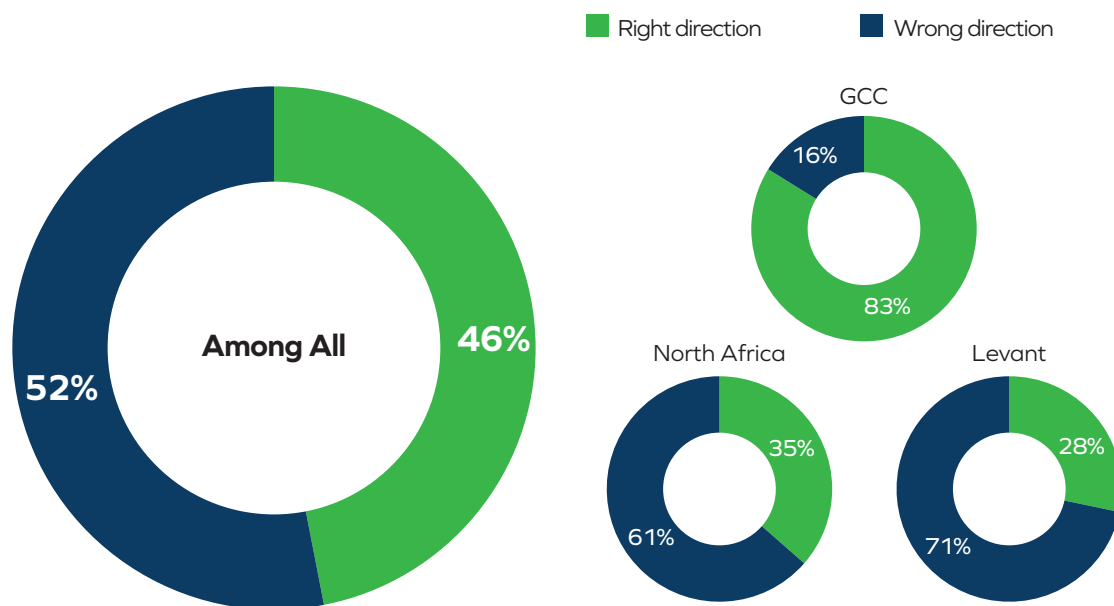
(Showing percentage, among all, saying not confident)



## Majority of youth in Levant and North Africa say their country is going in the wrong direction

Thinking about the last five years, in general, do you think things in your country of residence are going in the right direction or in the wrong direction?

(Showing percentage among all)

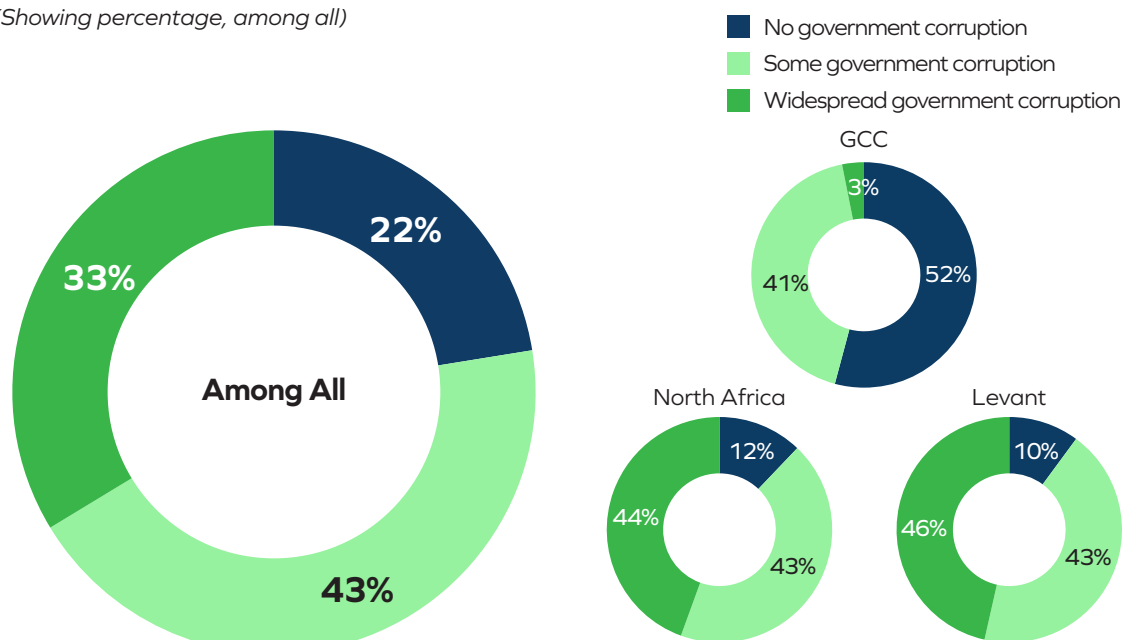


## A third of young Arabs say there is widespread government corruption in their country

Which of the following is closer to your view about your government?

“In my country, there is...”

(Showing percentage, among all)



(Not including 'Don't know')

## Commentary

# Old Concerns, New Aspirations: Transformed attitudes for a transforming world



### Dr. Jihad Azour

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

As the ASDA'A BCW Arab Youth Survey turns 15, many Generation Z Arabs - who grew up with regional upheaval, the COVID-19 pandemic, and the existential threat of climate change - are coming of age in a world of exceptional technological acceleration and increasing global fragmentation.

This is a generation who has lived their whole lives facing challenging job prospects, with an unemployment rate broadly unchanged since the Arab Uprisings. The post Covid-19 conjuncture has made these challenges worse, with a persistently high inflation, adding to cost of living pressures.

Today, governments have much tighter policy space to address these challenges than before the pandemic, especially given the higher global interest rates that makes borrowing to address public demands more costly. In addition, increasing global fragmentation could lead to lower long-term growth prospects for the region.

### In Search of Opportunities

The survey shows that the attitudes of Arab youth are indeed changing. While youth in the region largely remain unsatisfied with their governments' approach to tackle jobs and inflation, they are seeking new opportunities to chart their own path through jobs and entrepreneurship, especially in the fast-growing technology field.

For years, government jobs were preferred for their perceived high salaries, benefits, and security. Not so much anymore. Less than one-third of respondents in the 2023 survey want to work for the government, a sharp fall from nearly half in 2019 and nearly a 10-point drop in one year from the last survey.

At the same time, there is an increase of 13 percentage points compared to 2022 in the share of young people who would prefer private sector jobs. The entrepreneurial spirit in the region also remains strong, with one-quarter saying that they want to work for themselves or their family. Remarkably, over 40% of respondents indicated their intention to start their own business in the next five years.

The Arab youth's favorable views towards private sector activity are refreshing and positive because there is increasing buy-in for a new growth model that is fueled by a dynamic private sector, instead of state interventionism.

Considering the region's high levels of digital penetration, it should not be surprising that the tech sector is seen as the top preference for youths who want to start a business (15%). This is followed by e-commerce (13%), with creative industries, manufacturing, and real estate following at around 10% each.

**With more than 100 million young people expected to reach working age in the next ten years, now is the time to change the Arab world's engine of growth to navigate the challenges and opportunities of a quickly evolving world... Policymakers should continue to address the cost-of-living crisis while regaining policy space by tackling high debt and credibly taming inflation.**

### **Arab youth are asking for a "New Deal"**

Arab youth do not ask for handouts or jobs for life. Instead, they ask for tools so they can act themselves. They demand education, financial access, and more efficient markets. In particular, young Arabs have identified lowering costs for startups, enhancing training and education, as key 'asks' to help improve opportunities. Also highlighted were less red tape and stability in government and policies, among others.

As the survey shows, the youth are ready for a paradigm shift where the private sector takes the driving seat for economic activity and job creation while the public sector plays an enabling role. Fostering a more dynamic private sector will be key for job creation, especially since over 90% of jobs in developing countries are created in the private sector.

In a more challenging global environment where financing has become significantly more costly, many governments in the region (particularly oil importers with higher post Covid-19 debt) do not have any longer the fiscal space to be the main engine for growth and job creation.

Yet, we have seen a continuing trend among the youth that 'kitchen table' concerns - rising living costs, unemployment, state of the economy, corruption, and inequality - figure prominently in their lives. The results of the 2023 Arab Youth Survey, show that despite stark disparities in income and wealth, livelihood concerns remain a priority.

### **Dialogue to build Trust**

Experience in the last decade has shown that a two-way dialogue - where governments clearly define, choose, and if needed, adapt priorities in response to feedback - is essential to build social consensus. This will also allow for populations to feel that they have the power to influence outcomes and not be subject to policies which only benefit the few.

In the region, GCC governments have, in recent years, prioritized and devoted resources to addressing the aspirations of their youth and this shows: three-quarters of respondents in the GCC felt their voice matters to their country's leadership compared to just a third of youth in North Africa and the Levant.

A striking result of this year's survey is that the Arab youth is becoming less confident that their aspirations are being heard. Only 46% of the Arab youth surveyed says that their voice matters to their country's leadership. This is a clear

decline relative to the 2022 survey, which indicated that roughly two-thirds of Arab youth believed their voice matters.

### **What should policymakers do in response?**

With more than 100 million young people expected to reach working age in the next ten years, now is the time to change the region's engine of growth to navigate the challenges and opportunities of a quickly evolving world. Given the exceptionally high uncertainty and global economic headwinds, policymakers should continue to address the cost-of-living crisis while regaining policy space by tackling high debt and credibly taming inflation.

Macroeconomic stability will be a key foundation as the public sector refocuses on improving public good provision such as health, education, and social safety nets.

Governments should therefore prioritise creating a supportive environment for the private sector to boost investment, productivity, competitiveness - and to create jobs, including training the workforce to take advantage of a rapidly-evolving technological world.

Legal barriers and discriminatory practices against the private sector activity should be limited, while financial inclusion and deepening can provide much-needed capital for private sector investment. Enhanced participation will safeguard accountability and strengthen social cohesion and trust. Transparent institutions with strong accountability will help ensure that the rules of the game are fair and clear for everyone and can improve private sector confidence so that long-term investments take place.

The International Monetary Fund (IMF) stands ready to support policymakers and the Arab youth by providing policy advice, financing, and capacity development to governments as they face the challenges ahead. We intend to use the 2023 IMF/WB Annual Meetings that are taking place in Marrakesh to discuss ways to promote inclusive growth in the region.

I encourage you to read the specific policy recommendations and the summary of our work on these issues on our [website], [www.imf.org](http://www.imf.org). In addition, the Fund's research on financial inclusion, the importance of governance reforms, and strong and well-targeted social safety nets can help promote dialogue on how to navigate an ever-shifting world.

We are also helping governments in the region improve their operations and promote sound policy making in line with international best practices. But most importantly, the IMF stands ready to continue listening to the Arab youth as they grow into tomorrow's leaders and continue to shape the policy discussion.





## MY LIVELIHOOD

---

# KITCHEN TABLE ISSUES DOMINATE

---

Worried about the rising cost of living and lack of jobs, many young Arabs are turning entrepreneurial and aspire to start their own business in the next five years

## Kitchen table issues remain a concern for Arab youth

Over the 15 years of the annual ASDA'A BCW Arab Youth Survey, young Arabs across the Middle East and North Africa have consistently flagged one concern – a lack of confidence in their government to address the issues that matter to them most.

By these they mean 'kitchen table' concerns like jobs, rising living costs, affordable housing, decent education, and access to healthcare.

Our survey has also documented another phenomenon over the years – the stark contrast in the perceptions of youth in the Gulf Cooperation Council (GCC) states on these issues and those of their peers in North Africa and the Levant.

In the wealthier Arabian Gulf, where governments have increasingly invested in infrastructure and opportunities for

their citizens to progress, young men and women are understandably extremely optimistic about their future.

They believe that their voice matters to their leadership and that their governments have the right policies in place.

In North Africa and the Levant countries, however, two regions accounting for as many as 150 million of the more than 200 million young citizens living in the Arab world, the picture is very different, with youth there increasingly anxious about their prospects.

The third theme of this year's ASDA'A BCW Arab Youth Survey, 'My Livelihood', puts these divergent views in focus, while also pointing to a much more heartening trend across the Middle East & North Africa – the rise in youth entrepreneurship.



### The pressing concerns of young Arabs

This year, the top-five concerns of Arab youth are rising living costs (89%), unemployment (86%), the state of their national economy (84%), corruption (83%) and income inequality (81%). This list has remained largely unchanged for more than a decade, except when Arab youth cited the lack of democracy and the rise of Daesh, or ISIS, as their top concerns in 2011 and 2012, respectively.

Inflation is understandably a major source of anxiety for Arab youth today and is likely to remain so, with the International Monetary Fund recently stating that the war in Ukraine and further OPEC Plus production cuts would “increase fiscal and external strains for MENA importers”. Inflation, it said, was forecast to remain unchanged at around 15% this year, before declining modestly in 2024.

It is also hardly surprising that jobs are, once again, a massive worry for Arab youth, particularly in North Africa and Levant, with youth unemployment rates averaging around 30% in Egypt, Sudan and Algeria, three of the Arab world’s most populous countries, and exceeding 50% in Lebanon, which remains in

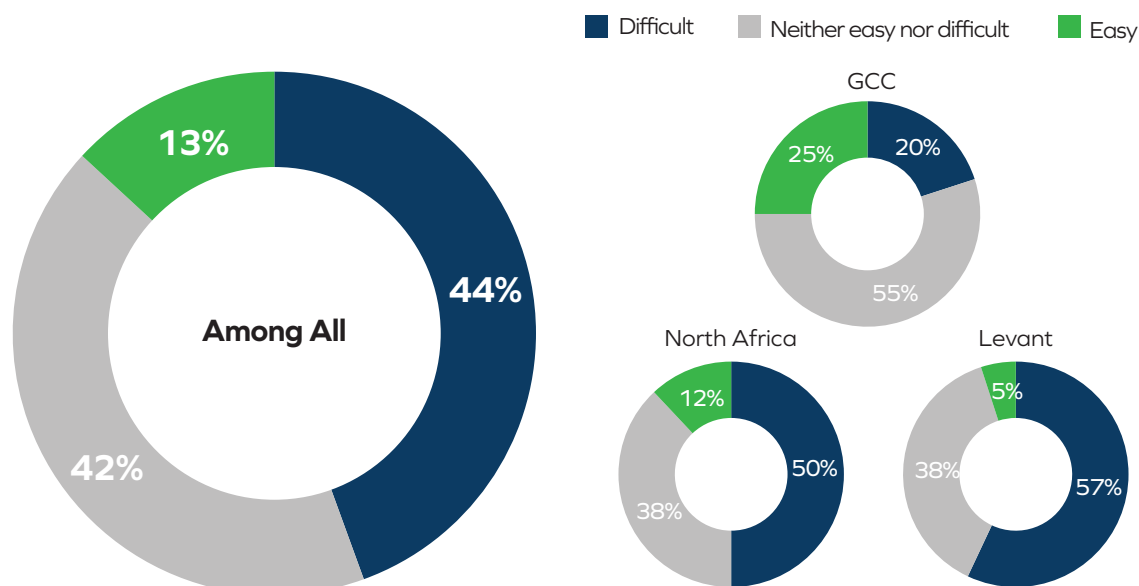
the grip of a currency crisis and an economic and political meltdown.

Over half of young Arabs outside the GCC polled in this year’s study said it would be difficult to find a job in their country, however only 20% of young GCC nationals said this, while a quarter said they were optimistic about their chances. And only 15% of GCC citizens interviewed said they struggled to meet their daily living expenses, compared with nearly half of respondents in North and Levant. However, 48% of GCC youth said they usually had little money left to save afterwards, compared with a third (36%) who said they were able to put money aside. Only a fifth of youth in the Levant and 18% in North Africa said they were able to save after meeting their regular expenses.

Debt is a widespread problem, with 27% of young men and women in the Levant and 16% of GCC youth saying they owe money. Student loans are the main cause, cited by around a quarter of Arab youth overall. Medical bills, wedding expenses and car loans are also responsible, while 9% of youth admit to ‘excessive shopping’.

### Except in GCC, over half of young Arabs 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?

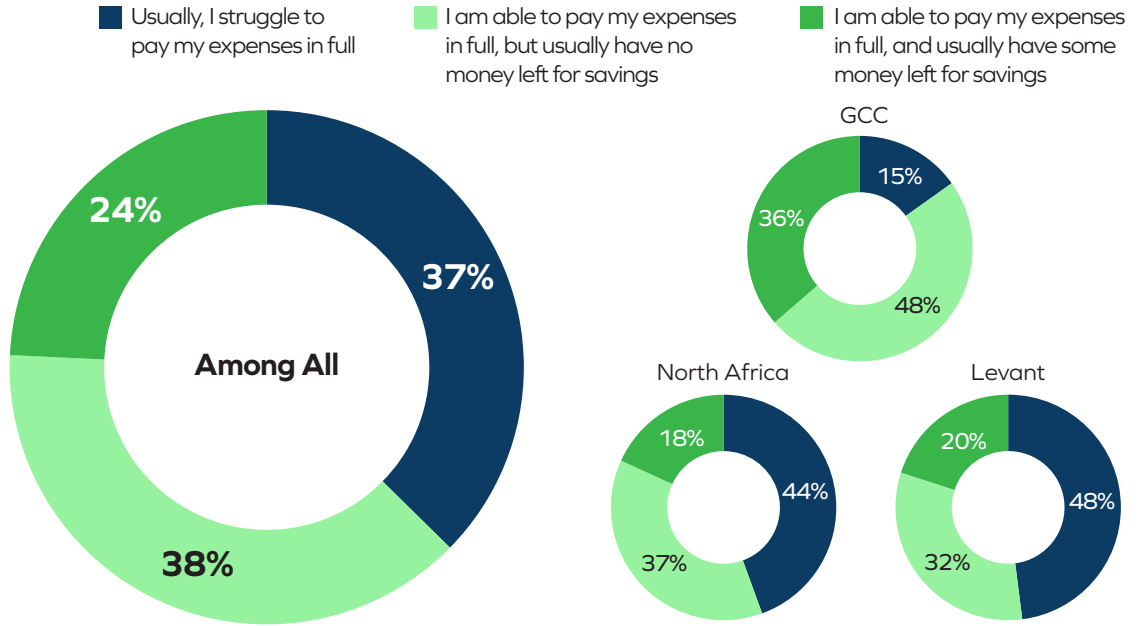


(Not including ‘Don’t know’)

## Nearly half of young Arabs in North Africa and Levant struggle to meet their daily expenses

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

(Showing percentage, among all)

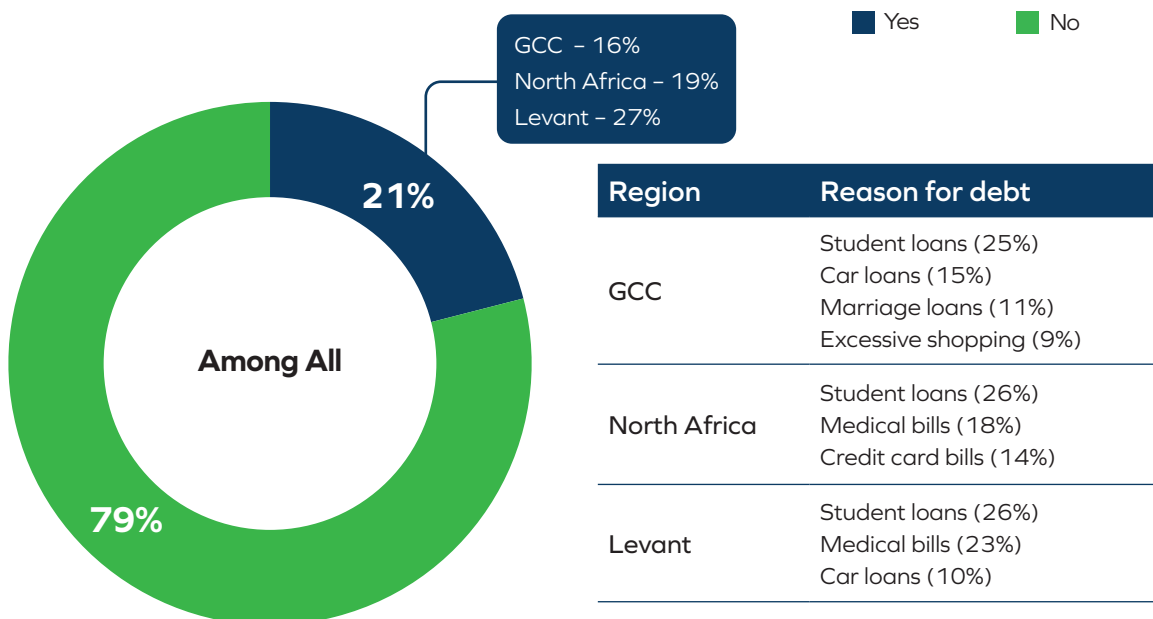


(Not including 'Don't know')

## A fifth of young Arabs say they are in debt, with student and car loans, medical bills, excessive shopping and marriage loans as main reasons

Are you currently in debt? And what is the main reason for your debt?

(Showing percentage, among all)



### A preference for private sector jobs

Another fascinating trend identified by the Arab Youth Survey has been the increased preference for jobs in the private sector. For years, government jobs were generally the most sought after, thanks to their perceived high salaries, benefits and security. However, attitudes are changing. While nearly half of all respondents in our 2019 study said they preferred to work for the government, only 30% feel the same today.

Whether this is evidence of the fruits of economic diversification or tightened government budgets in some countries, the fact remains that a third (33%) of Arab youth today say they would prefer to work in business – a significant 13% increase from 2022. And one in four (25%) say they want to work for themselves or their family, a slight drop on last year (28%) but a six-percentage point gain since 2019.

### Rising entrepreneurial spirit

Nearly half (42%) of Arab youth polled overall said they intended to start their own business in the next five years. This entrepreneurial spirit is greatest among GCC youth (53%) followed by those in

Levant (39%) and North Africa (37%), although two-thirds (66%) in these latter two regions say it will be difficult to get a business off the ground in their country. A majority (58%) of GCC youth, on the other hand, say it is easy to start a business in their country.

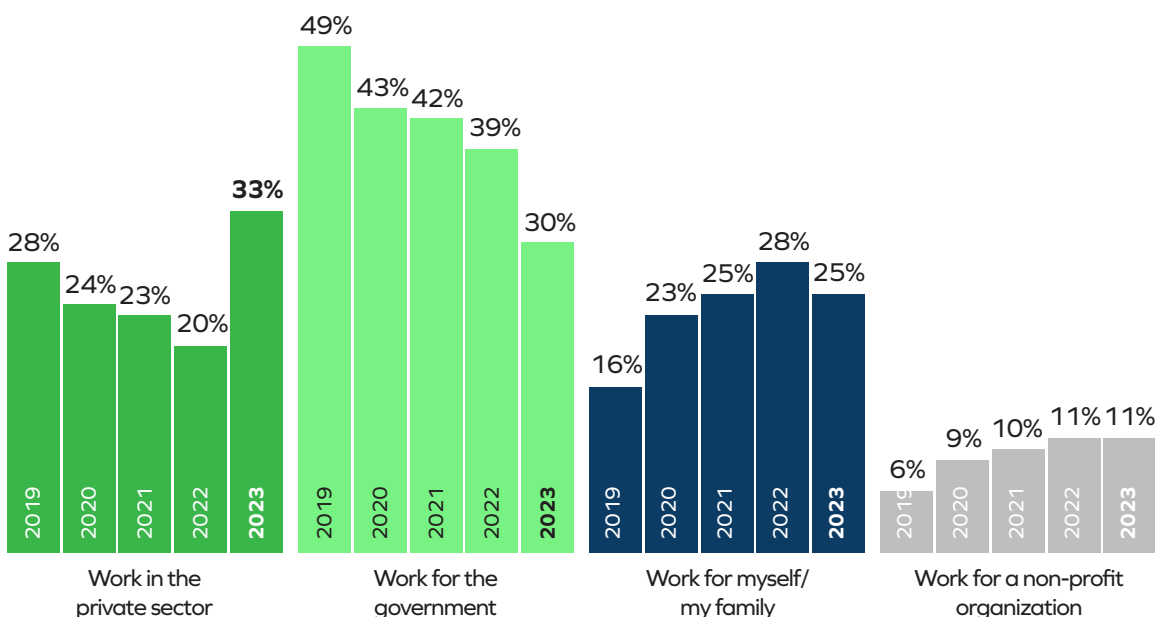
In terms of the incentives needed by would-be entrepreneurs, Arab youth identified tax breaks, reduced fees for startups, enhancing training and education, and government subsidies. Low-cost loans, less red tape, and infrastructure such as innovation centres were also highlighted.

Considering the heavy investment in knowledge industries by some Arab countries, it is unsurprising that the technology sector is the preferred choice of Arab youth hoping to go into business, named by 15% of respondents. This is followed by e-commerce (13%), the creative industries (11%), manufacturing (11%), real estate (10%), the food business (9%), freelancing (8%), and retail, hospitality and education (all on 7%).

## More young Arabs want to work in the private sector as the appeal of government jobs continues to decline

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

(Showing percentage, among all)

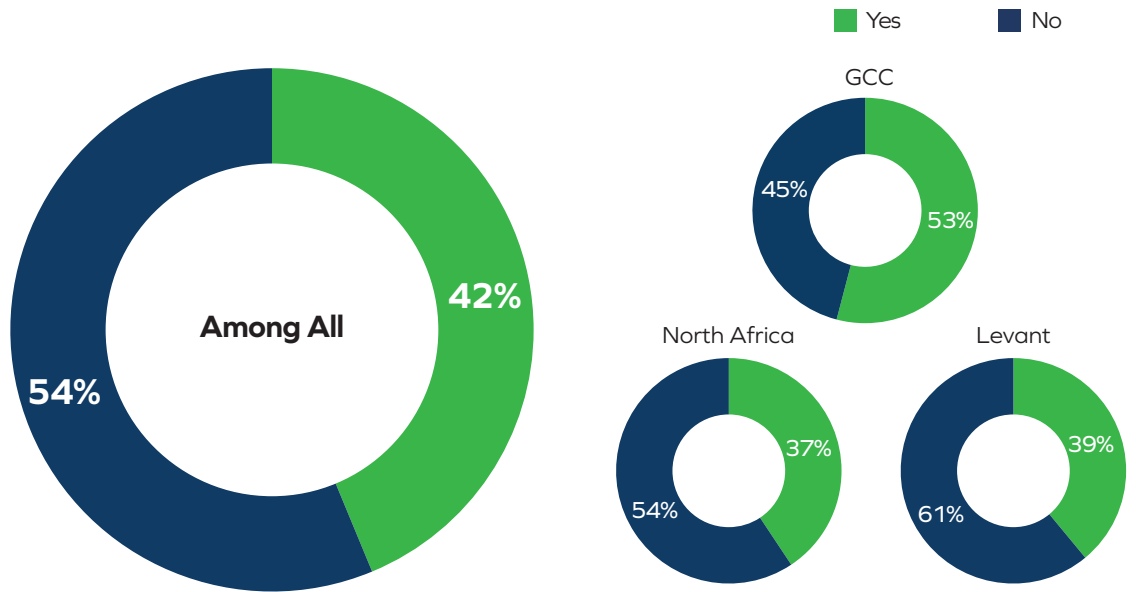


(Not including 'Don't know')

## Nearly half say they intend to start their own business within the next five years

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

(Showing percentage, among all)

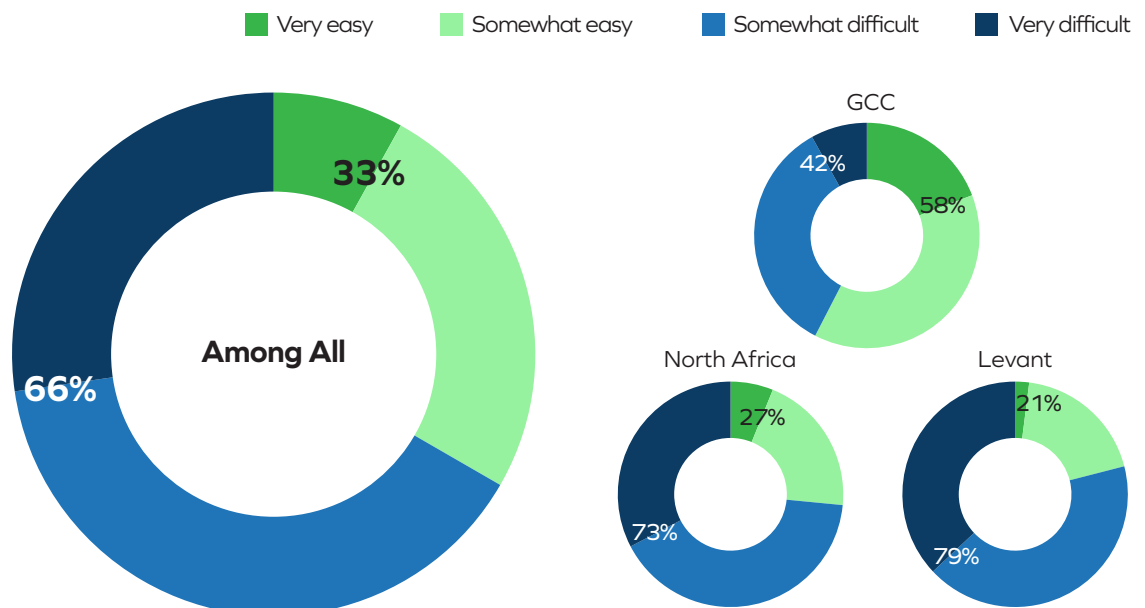


(Not including 'Don't know')

## Two-thirds say it is difficult for young people to start a successful business in their own country

How easy or difficult is it for young people to start a successful business in your country?

(Showing percentage, among all)

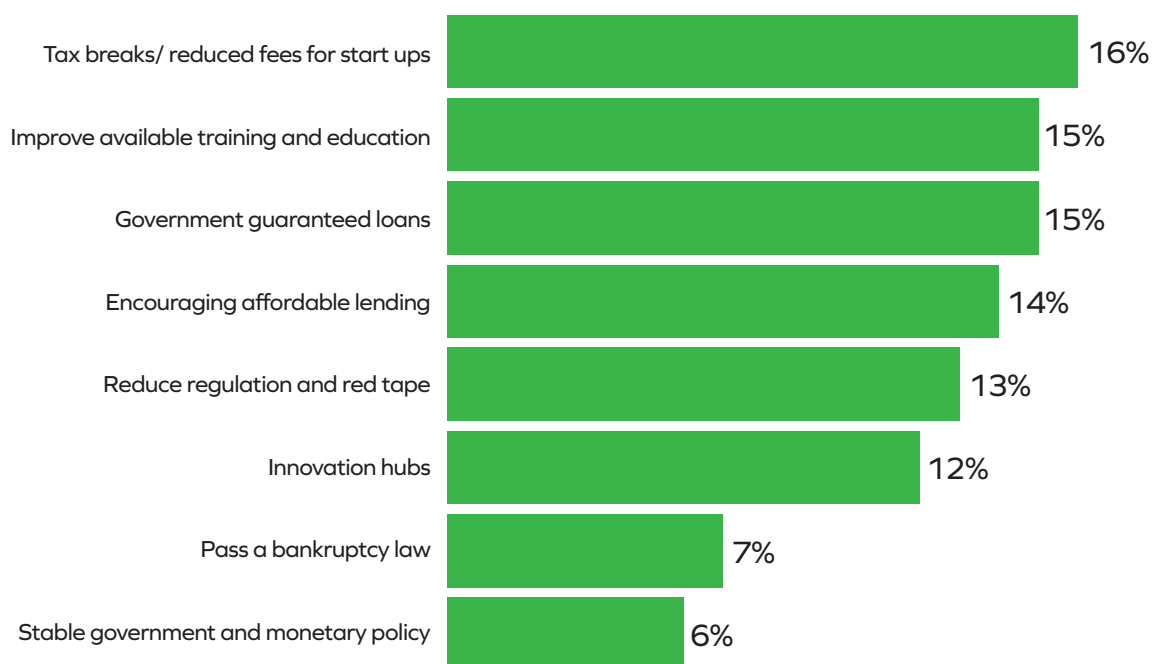


(Not including 'Don't know')

## Financial incentives and better training would encourage more young Arabs to start a business

What should your government do to promote entrepreneurship?

(Showing percentage, among all)

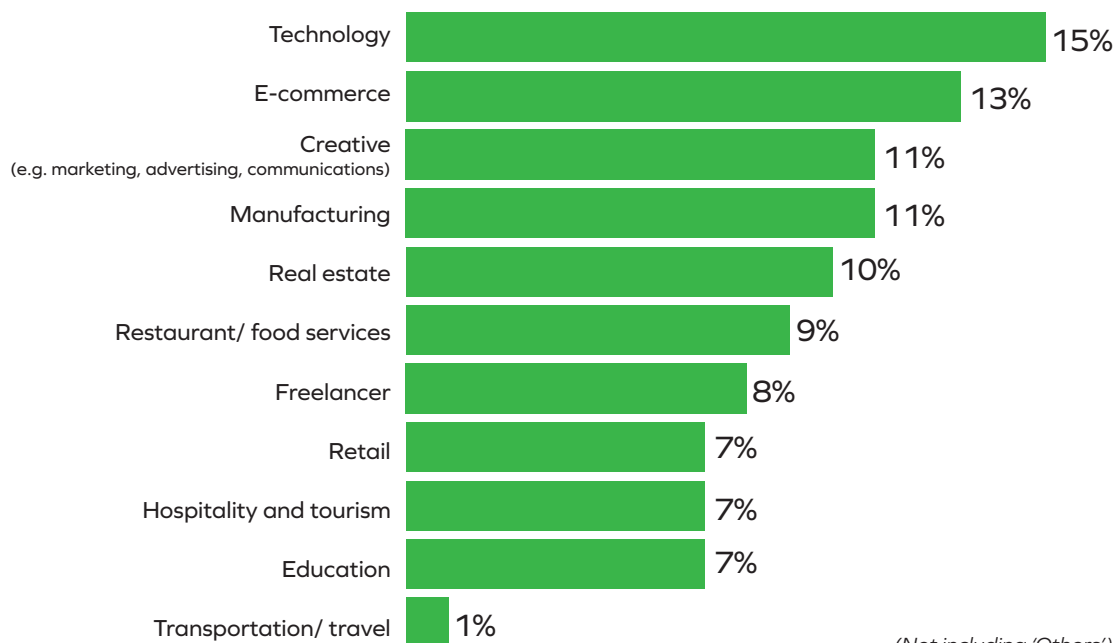


(Not including 'Others')

## Arab youth say they want to start a business in the technology, e-commerce or creative industries

In which industry would you like to set your business up?

(Showing percentage, among all)



(Not including 'Others')

## Commentary

# The growing hope gap across the region must be bridged



### Afshin Molavi

Afshin Molavi is a senior fellow at the Foreign Policy Institute of the Johns Hopkins University School of Advanced International Studies in Washington, DC, USA, and the founder and editor of the Emerging World newsletter.

As the sun washed over the Nile River, a young Egyptian graduate student told me of his dream: "I want to go to Dubai or Abu Dhabi, or somewhere in the Gulf, and find a job with decent pay and just live a normal life away from all of the troubles I have at home."

I had this conversation with the student a few years before the Arab Uprisings of 2011 that rocked Egypt and the wider Arab world, but a version of this conversation had been taking place elsewhere in North Africa and the Levant at the time and has spread ever since.

The most recent ASDA'A BCW Arab Youth Survey paints a stark picture of a divide in the Arab world, one that separates the relatively hopeful youth of the Gulf Cooperation Council (GCC) region and the frustrated and anxious youth from North Africa and the Levant regions.

On several key issues, it seems as if the two sets of youth – GCC on one side and North Africa and Levant on the other – are living in entirely different worlds.

Let us consider this basic polling question asked by the surveyors: "Thinking about the last five years, in general, do you think things in your country of residence are going in the right direction or in the wrong direction?"

In the Levant, 71% of youth say their country is going in the wrong direction. North African youth are similarly pessimistic, with 61% pointing to the "wrong direction" category. By contrast, only 16% of GCC youth fear their country is moving in the wrong direction, reflecting a far more hopeful population.

Perhaps part of the reason that Arabs in North Africa and Levant have grown increasingly concerned about the direction of their countries owes a great deal to their lack of faith in government.

When asked if their governments have the right policies to address their concerns, only a third of youth in North Africa and the Levant responded positively. When GCC youth were asked the same question, a resounding 83% felt confidence in their governments.



What emerges from these results are a deeply restive, anxious and frustrated youth population in North Africa and the Levant with little hope for the future. More than a decade after the Arab Spring that represented an explosion of years – even decades – of mounting frustration, we have not seen much progress. On the eve of these events, youth unemployment stood at about 25% across the region. Today’s youth unemployment? Roughly the same.

What’s more, the youth of North Africa and the Levant feel voiceless when it comes to their governments, with only about a third agreeing with the idea that their voice matters to government decision-making. As for GCC youth, 78% felt their voices mattered.

What emerges from these results are a deeply restive, anxious and frustrated youth population in North Africa and the Levant with little hope for the future. More than a decade after the Arab Spring that represented an explosion of years – even decades – of mounting frustration, we have not seen much progress. On the eve of these events, youth unemployment stood at about 25% across the region. Today’s youth unemployment? Roughly the same.

Going back to the 2008-10 Arab Youth Surveys, one can detect the seeds of the uprisings in the anxious voices of youth. Digging deep into those findings, one sees repeated themes of uncertainty and frustration around kitchen table issues, such as the rising cost of living and unemployment. Even back then, the dividing line of perceptions and hopes between GCC youth and non-GCC youth was noticeable. Those lines seem to keep widening.

The 2023 survey results show that when it comes to paying their expenses, finding a job, or facing debt, GCC youth once again fare better than the rest of the region – though the gap is much smaller when it comes to debt loads.

According to the OECD, some 55% of the population of the Middle East and North Africa region are under the age of 30, with nearly a quarter of those falling into the critical years of 15-29. In so many ways, the success of nations and regions owes to what kind of platform they provide for young people to thrive. In the right circumstances, young populations can be a boon, a driver of innovation and change, rocket fuel for a growing economy.

There is no one-size-fits-all approach, but clearly a combination of strong educational systems, a robust private sector, basic security, an entrepreneur-friendly legal system, and advanced infrastructure are key ingredients. Few countries possess all of those ingredients, but there is one intangible ingredient that is difficult to measure, but vital to a nation’s future: hope.

The 2023 ASDA/A BCW Arab Youth Survey depicts a glaring hope gap between GCC youth and the rest of the region. There is nothing more tragic – or damaging to the future of a country – than a hopeless generation with squandered potential, seeking to leave their country. And yet, this is the stark reality across many regional countries.

Still, there are gems of hope across the survey. For the first time in five years, more young people expressed their desire to work in the private sector than for government. More young people also expressed a desire to start their own business (42%.) Though the gap between the perceived difficulty of starting a business between GCC youth (more hopeful) and the rest was fairly wide, the fact that more than a third of North Africans and those from the Levant are eager to take the entrepreneur’s leap is promising.

Anyone who has travelled widely across the Arab world would have seen immediately the promise and resilience and dynamism of its young people. With just a modest boost, those young people will take their countries to new heights.

After fifteen years of surveys, the message of young Arabs is loud and clear. They simply want a decent opportunity to thrive, a level playing field where they can utilise their talents and energy at home. These are not unreasonable demands. They deserve to be heard.



## MY IDENTITY

---

# GUIDED BY FAITH

---

Arab youth's affinity towards their religion continues to be strong, while most worry about the loss of traditional values and their culture

## Exploring the cornerstones of Arab youth identity

The fourth emerging theme of the 15th annual ASDA'A BCW Arab Youth Survey, 'My Identity,' examines the attitudes of Arab youth on religion and the role of religious institutions in the Middle East. The findings highlight their concerns about the loss of traditional values, and what defines their personal identity.

Faith has always been the cornerstone of Arab identity over the years. The survey, since its inception, has explored how young Arabs view religion, and has documented their shifting perceptions vis-à-vis matters of faith. In 2012, most young people said that traditional values are important to them but many also cited that such values are outdated and need to be reformed.

In 2019, this call for reform reached its crescendo, with 70% of the respondents stating that religion plays too big a role in the Middle East and religious institutions need to be reformed.

The late Islamic scholar, Dr. Mohammad Shahrour, one of the leading researchers in the contemporary reading of the Holy Quran, observed in his commentary on this finding of

the ASDA'A BCW Arab Youth Survey in 2019, that "it brings to light an intellectual dilemma plaguing this generation."

He added that "a restructuring of religious institutions that takes enlightenment and scientific breakthroughs into consideration will enable young generations to look at their faith in a new light."

However, this year's survey reveals a young generation of Arabs increasingly concerned about the loss of traditional values and a majority disagreeing that religious institutions are holding back the region.

This shift in mindset has become increasingly apparent since 2020. Veteran Saudi journalist and commentator Khaled Almaeena observed that "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. Nationality, family or tribe, and cultural heritage constitute shields to preserve identity, further enveloped by religion and faith."



The importance of preserving Arab identity through these 'shields' of religion, family and cultural heritage, is more evident in this year's survey. Although the number of people who said religion is central to their identity has dropped from 41% in 2022 to 27% this year, the number of respondents who said family defines their identity recorded a significant 10% increase to 27%.

More young Arab men and women in North Africa (37%) cited family as most important to their identity, compared to one in five in the Gulf Cooperation Council (GCC) states and Levant. Arab youth who said nationality was most important to their personal identity recorded a 3% drop to

15% from last year, while only 4% attributed it to their political beliefs – a similar 3% decline from 2022.

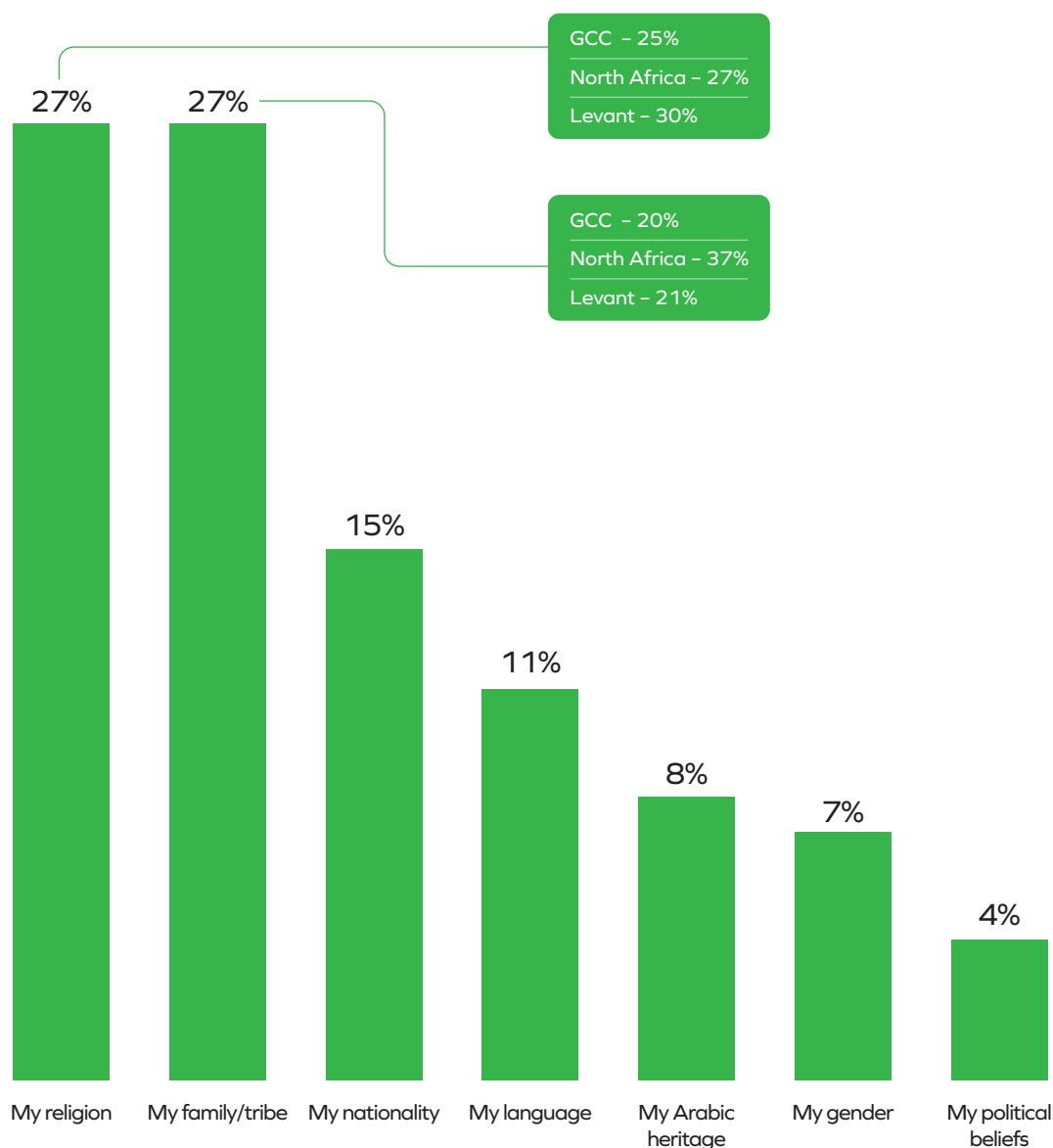
The findings underline that religion continues to play an important role in the life of Arab youth, with nearly two-thirds (65%) stating that preserving their religious and cultural identity is more important to them than creating a more tolerant, liberal, and globalized society – a sentiment shared by majority of youth in the three regions surveyed.

It is pertinent to explain here that the 15th annual ASDA/ABCW Arab Youth Survey was conducted from March 27 to April 12, 2023, amidst the Holy Month of Ramadan when the faithful fast from dawn to dusk.

## Arab youth say religion and family are key to their personal identity

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

(Showing percentage, among all)



Further highlighting this strong sense of identity with their faith, over three-fourths (76%) of Arab youth said they were concerned about the loss of traditional values and culture – the highest since 2019 – with 84% of youth in North Africa and 79% in Levant sharing the sentiment compared to 63% in the GCC.

One of the key findings in 2022 was that Arab youth appeared to be at a crossroads with 73% stating that religion plays too big a role in the region and 77% wanting to see reforms in religious institutions. This year, only about two thirds (65%) of young Arabs say that religion plays too big a role in the Middle East, an 8% decrease from last year.

**54%** Young Arabs say the Arabic language is less important to them than their parents

And unlike in 2022, when over three-quarters (77%) of Arab youth agreed to the statement that the 'Arab world needs to reform its religious institutions', fewer youth

(58%) feel the same in 2023, with 40% totally disagreeing with it – the highest percentage of young Arabs saying so in five years.

Further reiterating this outlook, about three-quarters (73%) disagreed that religious values are holding the region back, and nearly two-thirds (62%) of young Arabs said the laws of their country should be based on Sharia as opposed to civil/common law – an increase of 6% from 2022.

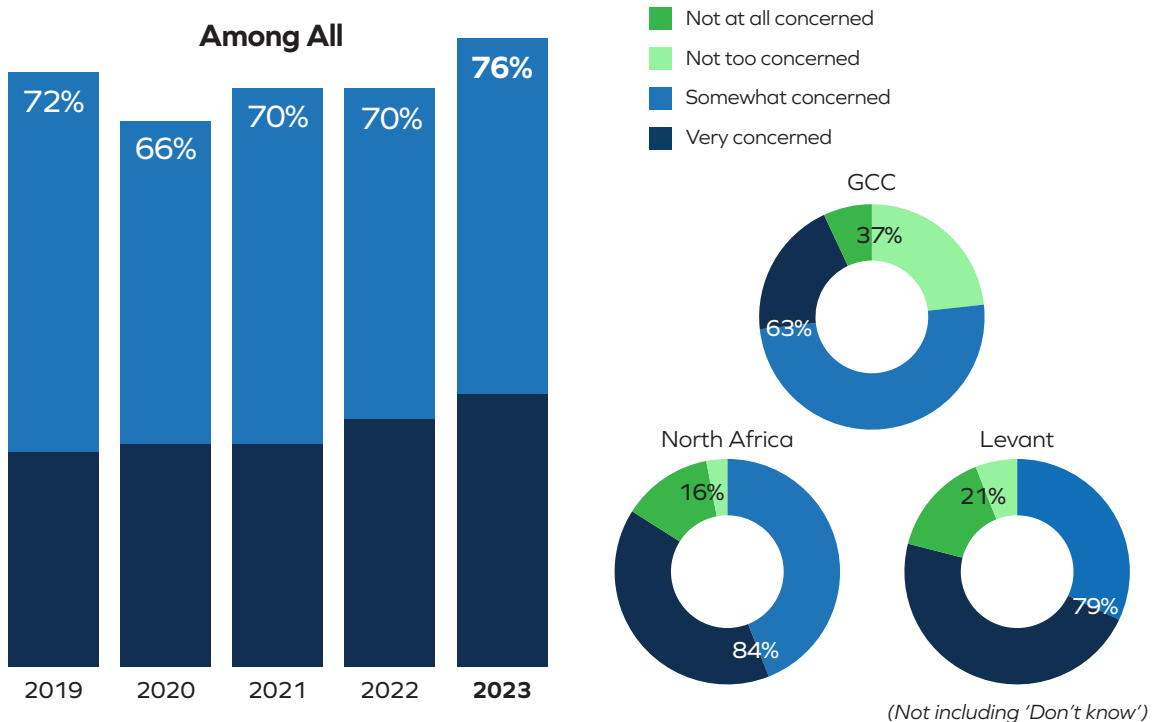
While in matters of religion and culture, most of the Arab Youth are rooted to their faith and beliefs, when it comes to the Arabic language, tellingly, they don't seem to exhibit the same sentiment. More than half (54%) say that the Arabic language is less important to them than it is to their parents – a 10% increase over 2022.

The findings point to a new reality that Arabic language seems to be losing its hold over the youth, even as more of them rely on their faith and family relationships to identify and set themselves apart in a fast-changing socio-political landscape.

## Over three-quarters are concerned about the loss of traditional values and culture

How concerned would you say are you about the loss of traditional values and culture?

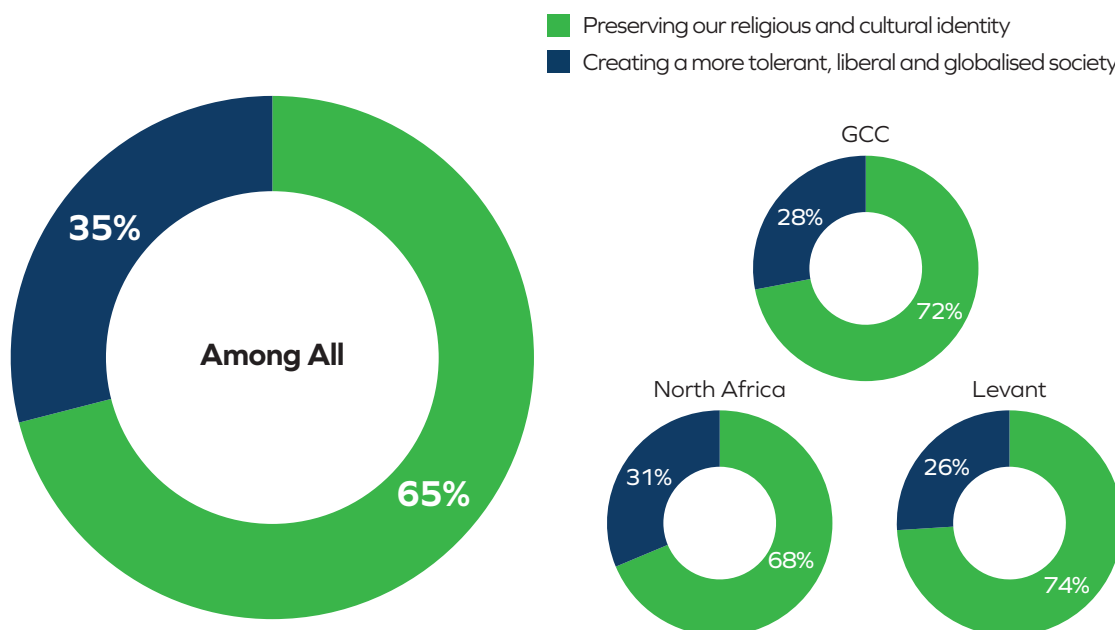
(Showing percentage saying 'very/somewhat concerned')



## Most say preserving their religious and cultural identity is more important than creating a more tolerant, liberal and globalised society

Which of the following is more important to you?

(Showing percentage, among all)

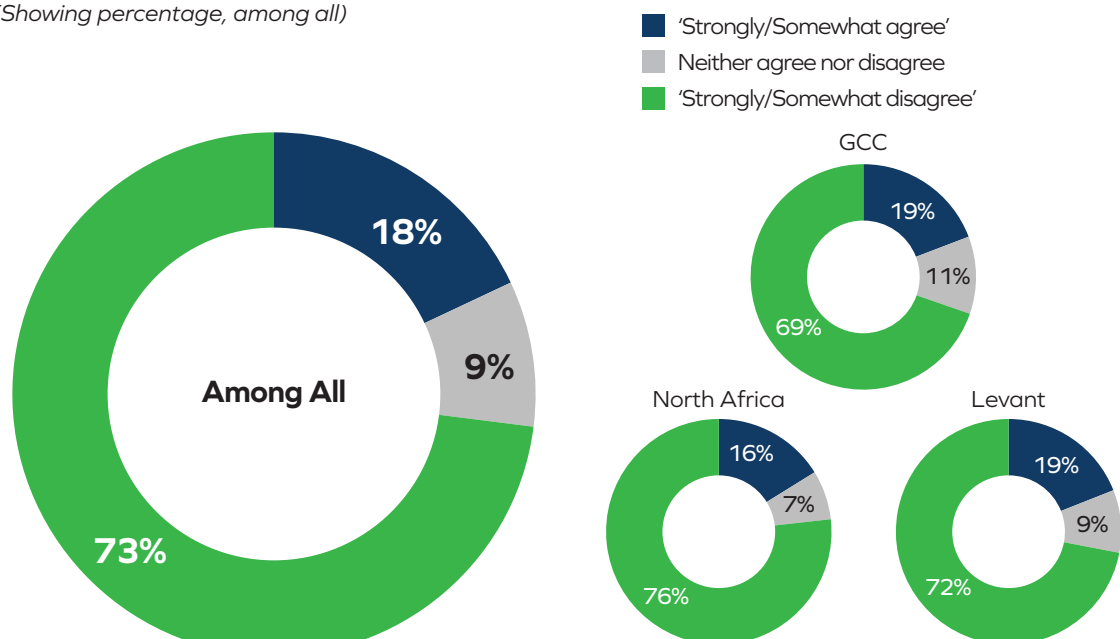


## Three-quarters disagree that religious values are holding the Arab world back

How strongly do you agree or disagree with the statement?

“Arab world’s religious values are holding the region back.”

(Showing percentage, among all)



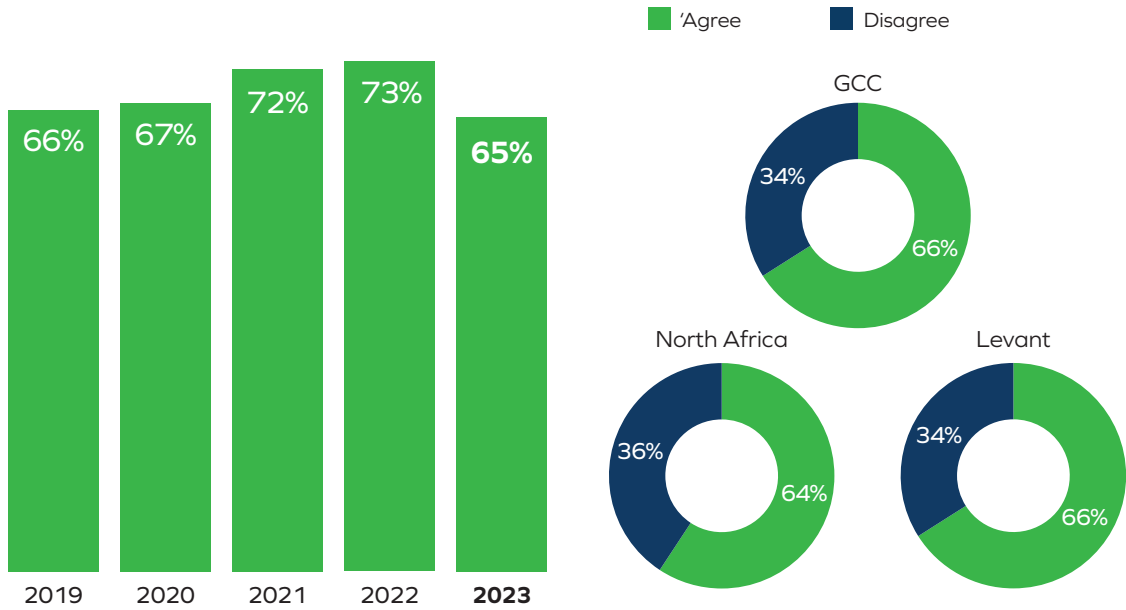
(Not including 'Don't know')

## Nearly two-thirds of young Arabs say religion plays too big a role in the region

How strongly do you agree or disagree with the statement?

**“Religion plays too big of a role in the Middle East.”**

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

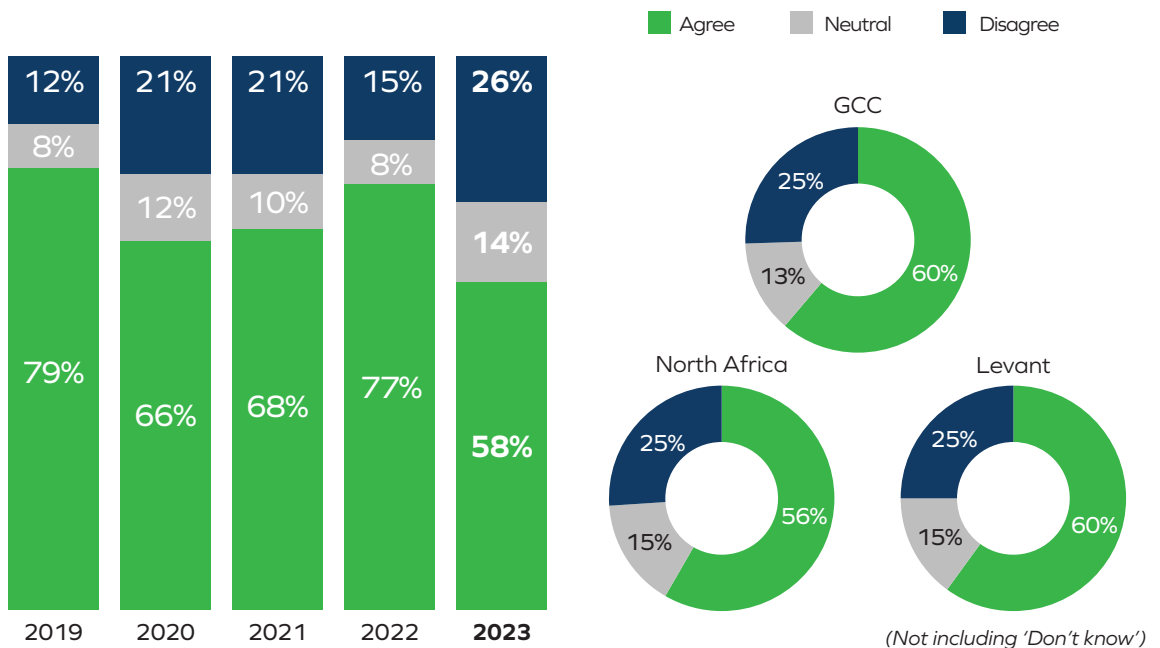


## Fewer youth than before agree that the Arab world should reform its religious institutions

How strongly do you agree or disagree with the statement?

**“Arab world needs to reform its religious institutions.”**

(Showing percentage, among all)

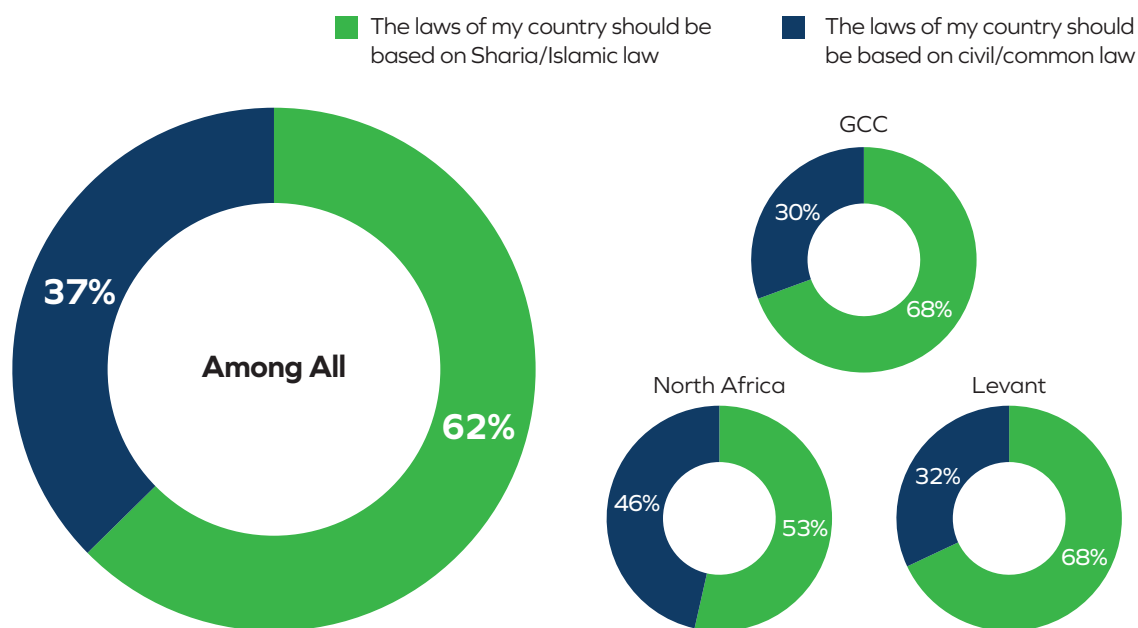




## Nearly two-thirds say that the laws of their country should be based on Sharia

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

(Showing percentage, among all, answering)

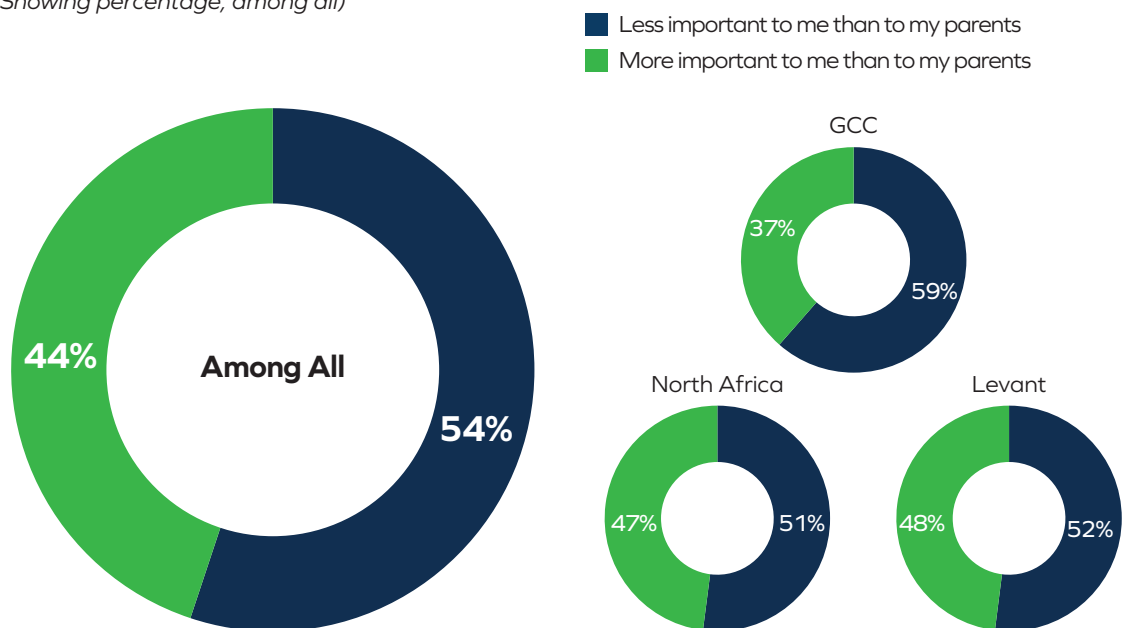


## Over half say the Arabic language is less important to them than it is to their parents

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

**“The Arabic language is...”**

(Showing percentage, among all)



(Not including 'Don't know')



## MY ASPIRATIONS

---

# RISE IN URGE TO EMIGRATE

---

Disillusioned with the state of the economy in their home country, many young Arabs, especially in North Africa and Levant, are actively considering emigration

# Over half of Arab youth, outside the GCC, want to emigrate

Yet the exuberance of youth keeps them optimistic

The fifth theme of the 15th annual ASDA'A BCW Arab Youth Survey 2023, 'My Aspirations', sheds light on the hopes and dreams of young Arabs.

What are their main concerns? What are their passions? How do they intend to realise their aspirations for a better life? And how do they compare their situation with that of their parents when they were the same age?

Notwithstanding the ongoing socio-political upheaval in much of the region, more than two-thirds (69%) of Arab youth say their best days lie ahead of them, illustrating the resilience of the post-Millennial generation. This is a slight increase from 2022, when 64% of Arab youth said their best days lay ahead. The outlook is particularly optimistic in the GCC, where a full 85% of the respondents say their best days lie ahead.

The success of global events staged in the Middle East, including Expo 2020 in Dubai and the FIFA World Cup 2022 in Qatar, have undoubtedly had a positive effect on Arab pride.

Individual achievements, such as the historic spacewalk of UAE astronaut Sultan Al Neyadi, Rayyanah Barnawi, the first female Saudi Arabian astronaut to arrive at the

International Space Station, and the sporting feats of Tunisian tennis player Ons Jabeur and Egyptian footballer Mohammed Salah, have also been an inspiration to many.

Even in North Africa and the Levant countries, which have been hard hit in recent months by soaring food and energy prices, the determination of Arab youth to ensure a better life for the next generation is unmistakable.

That is not to say that Arab youth are unaffected by the many challenges confronting their country. Over half of those surveyed say their national economy is going in the wrong direction, a stubborn trend over the past five years. This pessimistic outlook rises to 62% in North Africa and 72% in the Levant countries while only 88% of GCC youth say their country's economy is headed in the right direction.

Unsurprisingly, with youth unemployment in the MENA region at over 25% - the highest and fastest-growing in the world, according to the International Labour Organisation - getting a job was the top priority of Arab youth in this year's survey, more important even than completing their education. Sadly, for a large proportion of young Arab men and women, this means moving to another country.



In fact, over half of Arab youth in the Levant (53%) and North Africa (48%) say they want to emigrate, according to this year's survey. A dearth of local jobs, economic instability and conflict are the three reasons they cite for considering emigration.

In the GCC, however, less than a third (27%) say they were considering moving abroad, with the success of GCC governments in promoting access for their citizens to the private sector likely a factor.

The marked disparity in opportunity available to Arab youth was first highlighted in our 12th annual ASDA'A BCW Arab Youth Survey, which found that a majority of Arab youth in the Levant and North Africa were prepared to seek greener pastures away from their own country.

This finding in the year 2020 moved His Highness Sheikh Mohammed bin Rashid Al Maktoum, the Vice President and Prime Minister of the UAE, and Ruler of Dubai, to tweet that it was "painful when the Arab youth does not find safety and livelihood in his homeland."

Mohammed Al Gergawi, the UAE's Minister of Cabinet Affairs, while highlighting the Great Arab Minds project, observed that "tens of thousands of our youths emigrate looking for better opportunities - ignorance cost a loss of more than \$2 trillion to the Arab world."

According to this year's research, Arab youth considering emigration would most like to move to Canada (34%), followed by the United States (30%), Germany and the UK (tied on 20%) and France (17%).

However, contrary to the widely held perception of migrants in those countries receiving them, employment rather than citizenship is the main motivation for Arab youth seeking to leave their country.

According to this year's survey, nearly half of Arab youth (49%) say the main reason for emigrating is finding a job, compared with a quarter (24%) who say the primary motivation is citizenship.

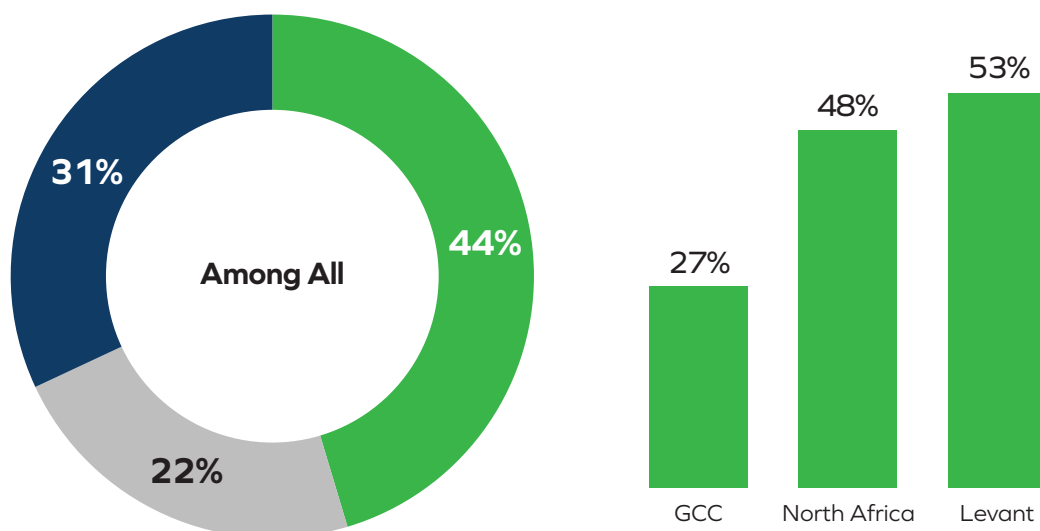
The marked disparity in opportunity available to Arab youth was first highlighted in our 12th annual ASDA'A BCW Arab Youth Survey, which found that a majority of Arab youth in the Levant and North Africa were prepared to seek greener pastures away from their own country.

## Nearly half say they want to leave their home country, with the desire to emigrate strongest in the Levant and North Africa

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

(Showing percentage saying)

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

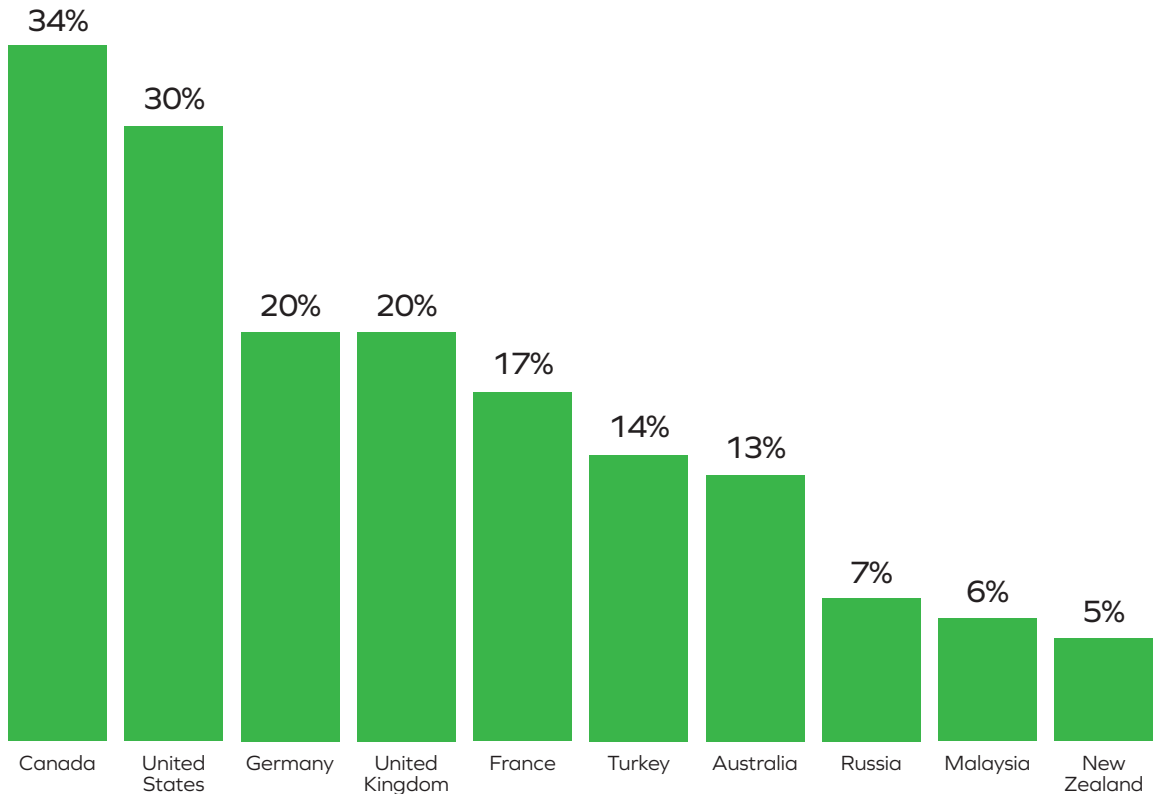


(Not including 'Don't know')

## Canada, United States, Germany, the UK and France are the most attractive destinations for those seeking to emigrate

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

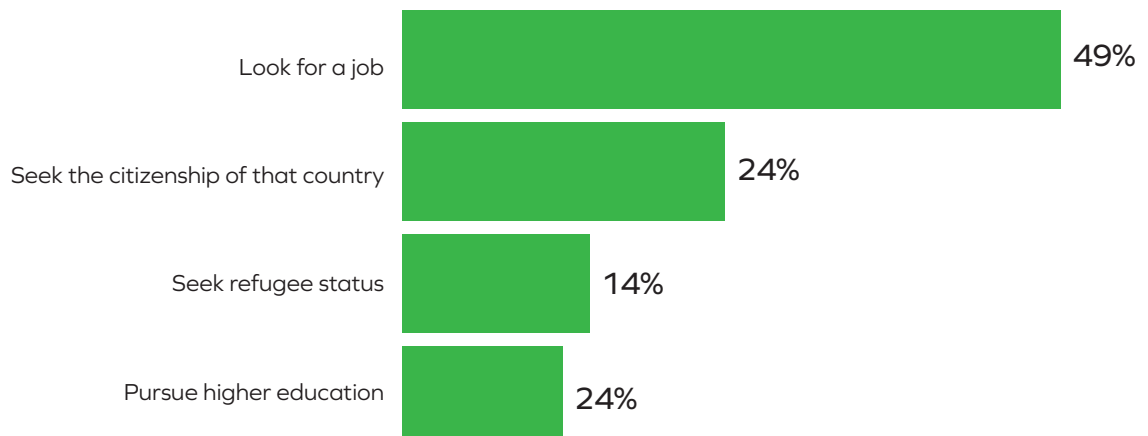
(Showing top 10, among those wishing to emigrate)



## Half of young Arabs wishing to emigrate say the primary reason for doing so is to find a job

Would you be moving to another country primarily to...

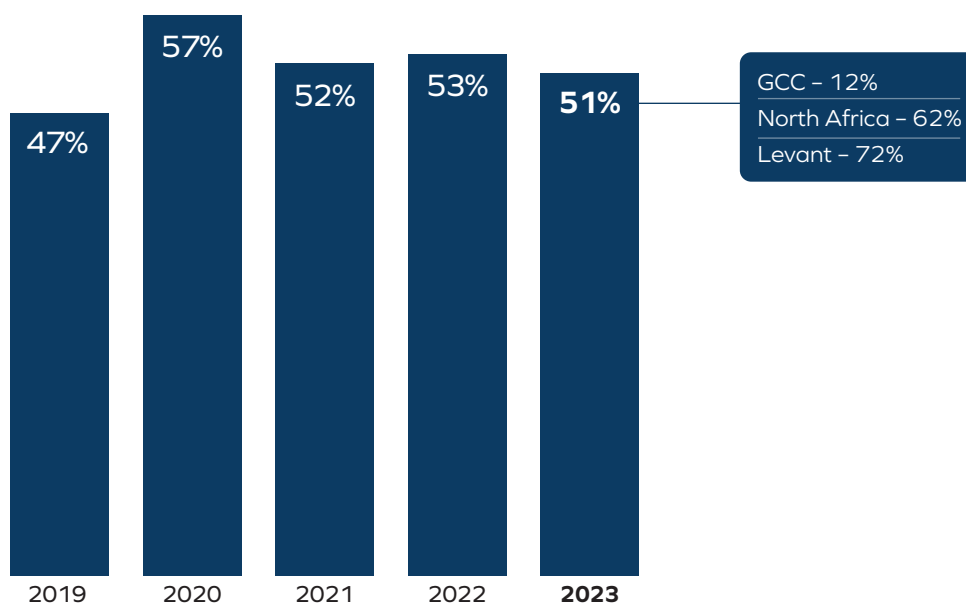
(Showing percentage among all)



## Over half say their country's economy is going in the wrong direction, a consistent finding over the past five years

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

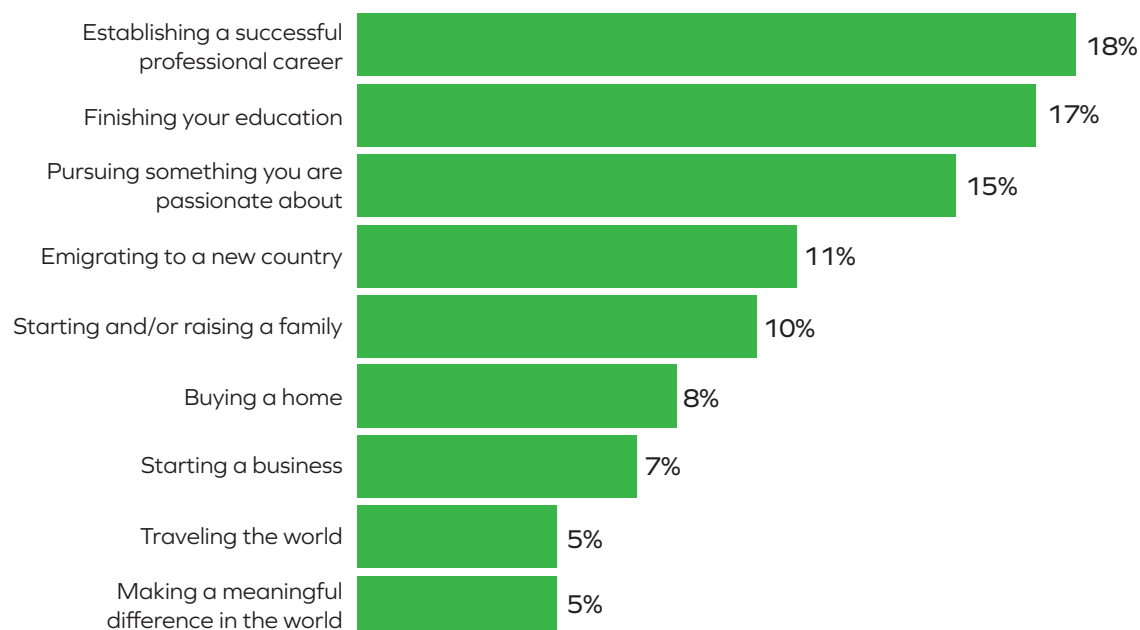
(Showing percentage saying 'Wrong direction')



## Young Arabs say they prioritise starting a career, finishing their education and doing something they are passionate about

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

(Showing percentage among all)



## Yet the exuberance of youth keeps them optimistic

Despite their fears about their national economy, more than two-thirds (69%) of Arab youth believe their best days lie ahead of them, a 5% increase over 2022. Youth in the GCC are the most hopeful (85%), followed by those in North Africa (64%) and the Levant (60%).

Compared with four years ago, youth optimism in the region is at its peak, with 57% today saying they will have a better life than their parents, compared with 45% who said this in 2019. The positivity is highest among GCC youth (75%), followed by young Arabs in Levant (52%) and North Africa (50%).

Massive investment in industry and infrastructure, which lead to job creation and a better quality of life, is clearly at the root of this optimism in much of the Arabian Gulf.

Thinking about the next 10 years, Arab youth mostly want to start a career (18%) followed by finishing their education (17%). Pursuing a personal interest they are passionate about ranked third (15%).

“This idea that each generation does better than the one before, is an essential part of modern politics,” writes award-winning journalist Faisal Al Yafai. “In most societies, it is a foundation of the social contract.”

Ironically, this conviction remains strong in much of the Arab world, while youth in many developed countries fear that they will be worse off than their parents, he adds.

In another insightful finding, more than 8 in 10 (85%) said Arab countries must uphold universal values such as freedom, equality and respect for human rights – a sentiment shared by most young Arabs in all the three regions covered – 91% in North Africa, and 81% each in the GCC and Levant.

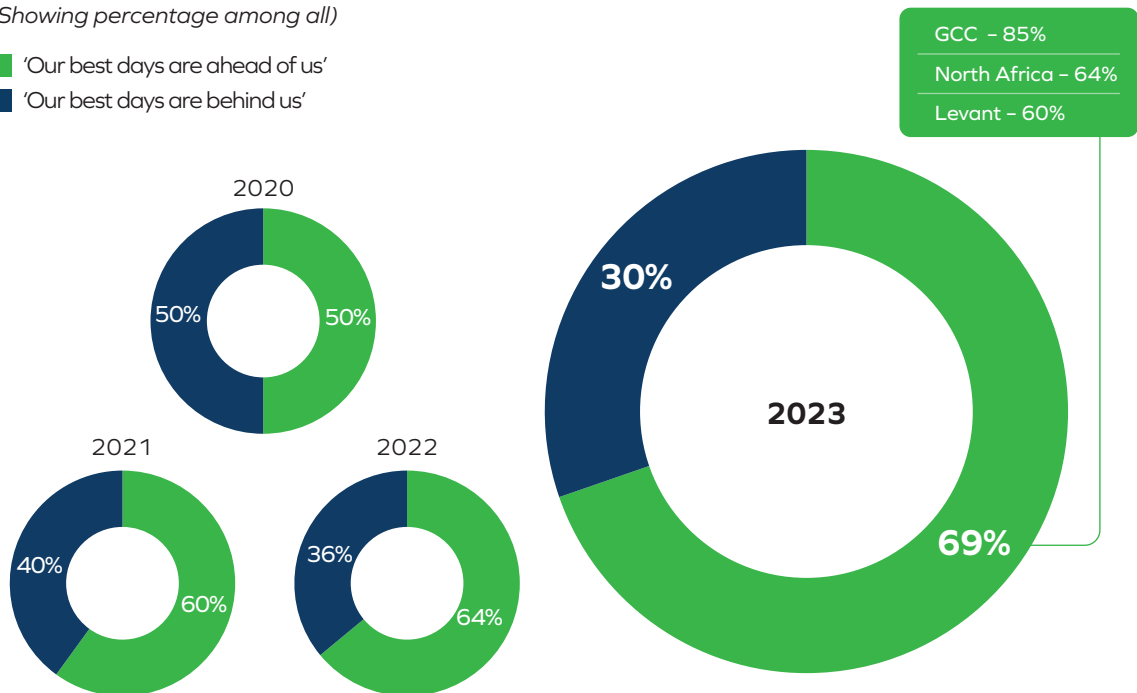
Compared with four years ago, youth optimism in the region is at its peak, with 57% today saying they will have a better life than their parents, compared with 45% who said this in 2019.

## More than two-thirds of young Arabs say their best days lie ahead, with GCC youth particularly hopeful

Which of the following do you agree with?

(Showing percentage among all)

- 'Our best days are ahead of us'
- 'Our best days are behind us'



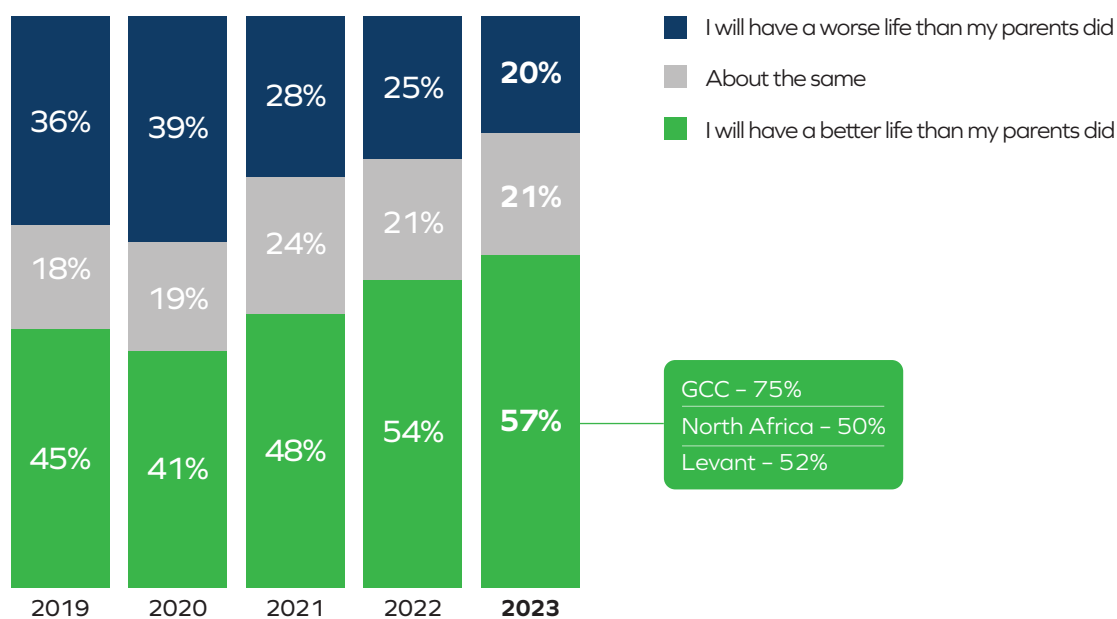
(Not including 'Don't know')



## More than half in North Africa and Levant say they will have a better life than their parents

Which of the following is closer to your view?

(Showing percentage among all)



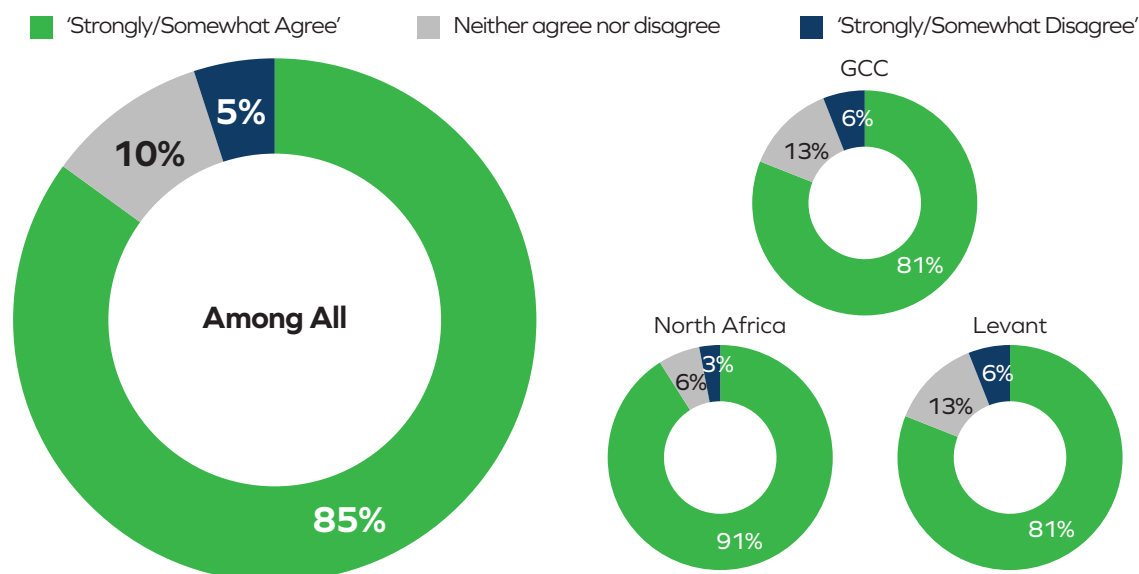
(Not including 'Don't know')

## More than eight in 10 say Arab countries must uphold universal values such as freedom, equality and respect for human rights

To what extent do you agree or disagree with the following statement?

**“I believe that global human values, such as freedom, equality, and respect for human rights, must be upheld by all societies across the Arab world.”**

(Showing percentage, among all)



(Not including 'Don't know')

## Commentary

# Religion and tradition emerge as popular anchors for Arab youth



### James M. Dorsey

Dr. James M. Dorsey is an award-winning journalist and scholar, an Adjunct Senior Fellow at Nanyang Technological University's S. Rajaratnam School of International Studies in Singapore, and the author of the syndicated column and podcast, *The Turbulent World with James M. Dorsey*.

Transitions are seldom linear. They are full of contradictions and often adhere to the Leninist principle of two steps forward and one backward.

This year's 15th annual ASDA'A BCW Arab Youth Survey highlights contradictions as Arab countries diversify economies, renegotiate social contracts, and redefine identities as well as social, cultural, and religious norms at a seemingly dizzying pace.

Surveys, like this one, offer fleeting impressions of those shifts, provide momentary insights rather than definitive answers, raise tantalising questions, and offer food for thought for future polling.

A majority of those polled stressed the importance of religion and tradition in their personal and public lives but believe religion plays too big a role in regional affairs. The survey leaves open what aspects of regional affairs youth were referring to and how they relate to religion in their personal lives.

Similarly, youth prioritise preserving religion and tradition more than creating a tolerant, liberal, and globalised society. Yet, more than 80% surveyed stressed the need for respect for freedoms, equality, and human rights.

The contradictions speak to uncertainty sparked by rapid social and economic change. They also highlight youth seeking refuge in national rather than transnational ideologies and clamouring for a raft to hold on to in uncertain and choppy waters. Religion and tradition emerge from the survey as popular anchors by a significant margin as religiosity among youth increases.

As a result, two-thirds of those surveyed favour laws based on Sharia, 70% disagree with the suggestion that religious values hinder development, and 76%, a slightly higher number than in recent years, worry about losing traditional and religious values.

Concern about traditional and religious values suggests complex youth attitudes towards aspects of reform. The complexity is reflected in an almost 20% drop of support for reform of religious institutions in the Arab world, from 79% in 2019 to 58% this year.

**What Arab youth have in common, irrespective of their perspective and geography, is a desire for proof of concept. The difference between the Gulf and the rest of the Arab world is that GCC youth are more confident than their Levantine and North African counterparts that their governments will deliver jobs and opportunities.**

Youth emphasis on tradition and religion suggests that deepening national as opposed to religious and tribal identity remains a work in progress in the Arab world. Among those surveyed, 54% said religion, family, or tribe were key components of their identity, compared to only 23% who cited nationality or Arab heritage.

Similarly, just over half attribute less significance to Arabic than their parents. The reduced weighting of the language implicitly suggests an inclination towards a more globalised society. Yet, squaring the circles is difficult with youth saying they are less focused on globalisation.

How the contradictions play out may be most evident in the potential fallout of stark discrepancies in how youth in different subsets of the Arab world look to the future.

A 20% differential in optimism among youth in the Gulf and the rest of the Levant and North Africa tells the story. In the GCC, 85% of youth, compared to just above 60 per cent in the rest of the Arab world, believe their best days lie ahead. By the same token, 75% in the GCC but only some 60% elsewhere envision having a better life than their parents.

The stark reality behind these figures is defined by degrees of confidence in government policies. Over the last five years, trust that government policies will enable youth to fulfill their dreams has been consistently high in the GCC and low in the rest of the Arab world, much of which has witnessed social unrest over the past decade.

In this year's survey, a whopping 62 to 72% of youth in much of the Arab world said their country's economy was heading in the wrong direction. Only 12% in the GCC agreed. In other words, 88% appeared to have a more favorable impression of economic developments.

Aspirations to migrate tell a similar story with 53% of youth in the Levant and 48% in North Africa expressing a desire to migrate compared to only 27% in the GCC.

The search for a job is the top reason for migration. Yet rather than searching in the Gulf, given its economic dynamism and cultural affinity, job seekers look primarily at Canada, the United States, Britain, Germany and France. Even so, the UAE tops the list of countries Arab youth would like to live in and see their homeland emulate.

What Arab youth have in common, irrespective of their perspective and geography, is a desire for proof of concept. The difference between the Gulf and the rest of the Arab world is that GCC youth are more confident than their Levantine and North African counterparts that their governments will deliver jobs and opportunities.

At the same time, GCC states, like Saudi Arabia and the UAE, are seemingly aware of the risks inherent in skewed regional development. Increasingly, they tie financial aid and economic assistance to recipients' economic reform policies.

However, ensuring that the benefits of rapid change, investments, and assistance trickle down may be vital in striking a balance between tradition, religion, tolerance, human rights, freedom, and globalisation. Finding the proper equilibrium could also boost the development of dominant national identities but leave space for religious, tribal, and cultural sub-identities.

If this year's survey tells us anything, it is that Arab youth seek certainty in a sea of uncertainty. Job creation and enhanced opportunity would help provide confidence, which would ease the fusing of religion and tradition with requirements of economic development.

## Social, economic and social media indicators 2023

Country	Population (million)	GDP Current prices (US\$ billion; 2023 est.)	Contribution of oil to GDP (%)	Youth (15 to 24 years) unemployment (% of total labour force)	Internet users (million & penetration; 2023)	Active social media users (million & penetration; 2023)	Mobile subscriptions (million & penetration; 2023)
<b>GCC</b>							
Bahrain	1.87	44.87	10.9	6.6	1.65 (93%)	1.59 (85%)	2.1 (112%)
Kuwait	4.32	164.71	27.6	15.4	4.27 (99%)	4.05 (93%)	7.64 (176%)
Oman	5.48	104.9	23.5	7.5	5.02 (91%)	4.39 (83%)	6.99 (127%)
Saudi Arabia	36.9	1,060	35.2	23.8	36.31 (99%)	29.3 (82%)	43.8 (124%)
United Arab Emirates	10.36	498.98	30	9.3	9.99 (100%)	10.65 (106%)	19.05 (184%)
<b>Sub-total</b>	<b>58.93</b>	<b>1,873.46</b>			<b>57.24</b>	<b>49.98</b>	<b>79.58</b>
<b>Levant and Other Middle East</b>							
Jordan	11.33	52.06	Not Significant (NS)	39.4	9.95 (87%)	6.85 (60%)	8.61 (76%)
Iraq	45.4	267.89	42.8	34.6	33.7 (74%)	28.35 (62%)	45.76 (101%)
Lebanon	6.7	23	NS	47.8	5.67 (84%)	5.06 (75%)	4.69 (70%)
Palestinian Territories	5.36	18.45	NS	40	3.96 (74.6%)	2.95 (55%)	4.4 (84%)
Syria	23.12	20.5	4	22.2	9.25 (40%)	8.5 (35%)	15.57 (69%)
Yemen	34.38	19.5	10	25.6	9.1 (26.7%)	3.5 (9%)	19.63 (58%)
<b>Sub-total</b>	<b>126.29</b>	<b>401.4</b>			<b>71.63</b>	<b>55.21</b>	<b>98.66</b>
<b>North Africa</b>							
Algeria	45.54	206.1	14.5	29	32.9 (72%)	26.6 (58%)	48.5 (106%)
Egypt	112.56	387.1	3	31.1	80.75 (72%)	51.45 (49%)	105 (93%)
Libya	6.9	46.3	56.4	51.5	3.14 (45%)	6.4 (91.4%)	12.5 (181%)
Morocco	37.8	138.78	NS	24.9	33.18 (87%)	23.8 (63%)	50.9 (133%)
Sudan	47.9	46.71	3.3	34.5	13.49 (28%)	1.3 (3%)*	35.92 (74%)
South Sudan	11.07	7.01	10.4	19.2	0.77 (6.32%)	0.47 (4%)	3.58 (32%)
Tunisia	12.45	49.82	1.5	37.1	9.8 (8.15%)	8.15 (65%)	16.48 (132%)
<b>Sub-total</b>	<b>274.22</b>	<b>881.82</b>			<b>173.34</b>	<b>118.17</b>	<b>272.88</b>
<b>Total for all 17 states covered</b>	<b>459.44</b>	<b>3,156.68</b>			<b>302.21</b>	<b>223.36</b>	<b>451.12</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

## About us



ASDA'A was founded in 2000 as an independent communications firm by Sunil John, who leads the agency in its 24th 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 nearly 200 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)



BCW, a leading global communications agency, is in the business of moving 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.

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



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

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



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

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



15<sup>th</sup>  
ANNUAL  
EDITION  
2023