



The Arab Millennials

Understanding the aspirations
and attitudes
of Middle East youth

A White Paper on the findings of the
First Annual ASDA'A Burson-Marsteller
Arab Youth Survey 2008
www.arabyouthsurvey.com

asdaa


Burson•Marsteller

Dubai, United Arab Emirates

Dear friends,

The Middle East is one of the most dynamic regions in the world. It is at the crossroads of civilization, it is the birthplace of the world's great faiths, and it is a land of prosperity, diversity, and, of course, controversy.

Today, nearly one in three people living in the region are between 15 and 25 years old. Understanding this large demographic is important to a broad cross section of society, including government, business and the media.

The challenge to government is to provide job opportunities for a rapidly growing workforce, and to ensure that young people have the means to realise their full potential. The challenge to business is to understand the specific needs of young, tech-savvy and trend-conscious consumers. The challenge to media is to respond to a young audience that is more educated, self-aware and questioning of its environment than previous generations ever were.

The value of a detailed assessment of the beliefs and motivations of Middle East youth is therefore clear. Accurate insights lead to carefully considered policies and ideal environments in which youth can thrive.

The first of an annual series, the ASDA'A Burson-Marsteller Arab Youth Survey 2008 aims to encourage more research of Arab youth. Just as importantly, it seeks to compare these insights with the behaviour and beliefs of youth in the West.

In this document, we review the main findings of a survey conducted in September 2008 of 1,500 youth between the ages of 18 and 25 in six Middle East countries: Egypt, Jordan, Kuwait, Qatar, Saudi Arabia and the UAE. The same study was carried out among 300 youth of the same age in Germany, the United Kingdom and the United States.

We have now completed 2,000 face to face interviews within nine Arab countries for the Second Annual ASDA'A Burson-Marsteller Arab Youth Survey 2009 in partnership with Penn, Schoen & Berland Associates, Inc. (PSB) and will be announcing our key findings on March 7, 2010.

With my sincere appreciation and thanks,



Sunil John
Chief Executive Officer
ASDA'A Burson-Marsteller

About the Arab Youth Survey

In September 2008, ASDA'A Burson-Marsteller commissioned research among young people in the Arab world. The survey studied the attitudes and aspirations of youth in four Gulf states (Saudi Arabia, UAE, Kuwait, Qatar), Jordan and Egypt.

Questionnaires were completed online by 250 respondents between the ages of 18 and 24 in each of the six countries, and by 100-strong samples in each of three Western countries: Germany, the UK and United States. The survey results have a margin of error of +/-5.66% in the Middle East and +/-9.8% in Germany, the UK and US.

Interview samples in the Middle East broadly represented the demographics of each country. Middle East respondents, while generally referred to in this paper as 'Arab youth', were therefore mostly but not exclusively Arab. This approach, in the opinion of the authors, provides a more authentic snapshot of youth attitudes at the national level, especially in those countries, such as the UAE and Qatar, where expatriates are the majority.

The highlights of the First Annual ASDA'A Burson-Marsteller Arab Youth Survey were announced at an event in Dubai in November 2008, attended by Burson-Marsteller Global CEO Mark Penn, advisor to former US President Bill Clinton and author of the bestselling book *Microtrends: The Small Forces Behind Tomorrow's Big Changes*.

The occasion also welcomed contributions from a panel of opinion leaders and Middle East intellectuals: Mohamed Alabbar, Chairman of Emaar Properties; Hassan Fattah, Editor of Abu Dhabi-based newspaper *The National*; Saudi Arabian academic and playwright Dr. Maisah Sobaihi; and Mohammed Saeed Harib, Managing Director of Lammtara Productions and creator and producer of the animated TV series *Freej*.

Excerpts from the panel discussion are included in the appendix of this paper.

Introduction

Around the world, the millennial generation is increasingly making its presence felt in government, business and wider society. Alternatively known as Generation Y, the millions of young people born between 1980 and 2000 have many distinguishing characteristics.

They are the first generation to grow up in the digital, media-saturated and globalised era. They are the post-Cold War generation, coming of age in the wake of September 11. They have also benefited from the rapid economic growth that defined the late 1990s and the first years of this century.

Global surveys of millennials suggest they are global, civic and community minded, politically engaged and aligned to a progressive world view. Economic and social inequality, climate change and stewardship of the environment are among their major concerns.

Empowered by technology, millennials have unprecedented access to information, the ability to communicate and network. They therefore wield significant influence and demand to be taken seriously by policy- and decision-makers alike.

The Arab world is home to one of the largest concentrations of millennials. Statistics from the World Bank and United Nations show that two thirds of the population in the Middle East and North Africa is below the age of 25.

But how similar are Arab millennials to their peers in the West? How do the cultural idiosyncrasies of the Arab world affect their outlook?

The First Annual ASDA'A Burson-Marsteller Arab Youth Survey aims to address these questions, and future surveys in the annual series will track how Arab youth attitudes change over time.

In the United States, 23 million millennial voters helped propel Barack Obama into the White House. Will Arab millennials one day have a comparable impact?



Executive summary

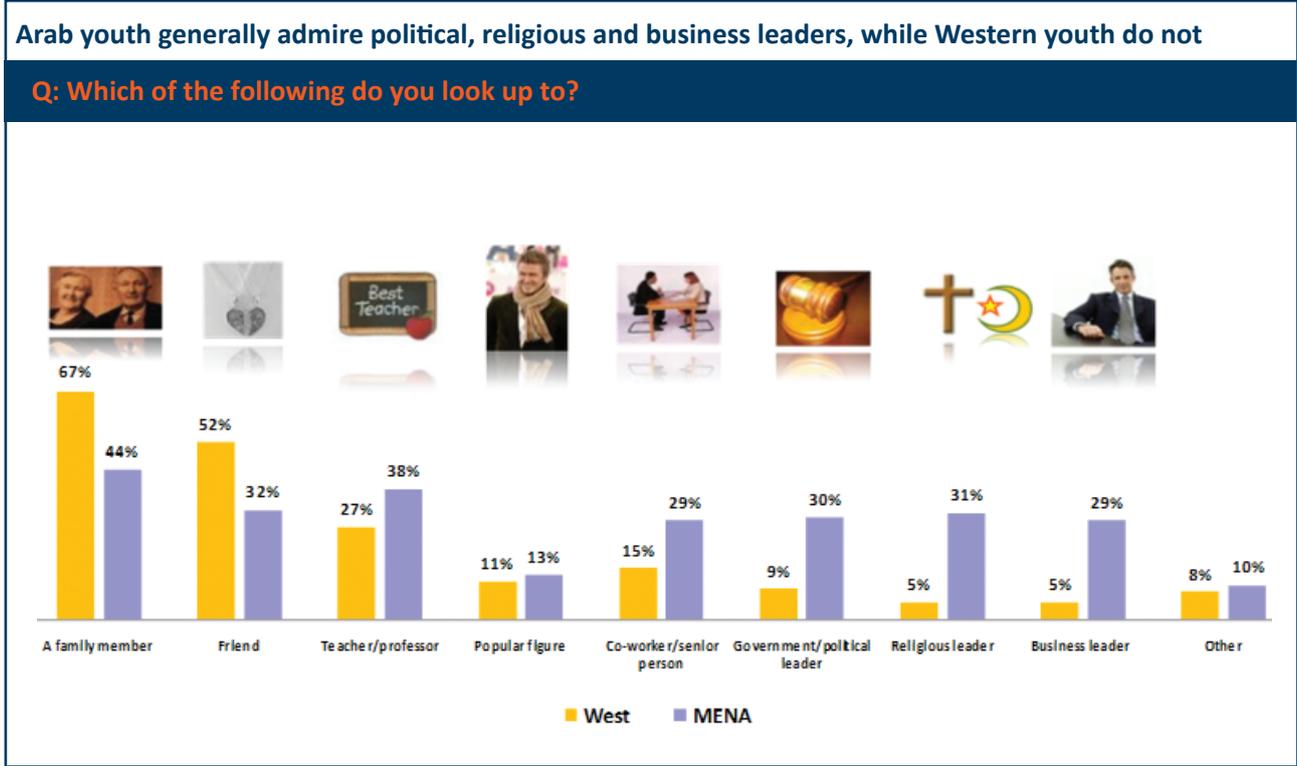
First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008

Young people in the Middle East and West do similar things, enjoy the same technologies, and share many identical lifestyle habits. Both spend most of their money on going out or shoes and clothing, and constantly worry about their appearance. Both use mobile phones as their main technology and are always texting their friends and family. When online, the purpose is the same – emails, downloads, social networking.

Young people in the Middle East and West are worried about the economy and rising living costs. In the West concerns are greater with respect to the global economic downturn, climate change and rising crime. In the Middle East, corruption and the erosion of traditional values are bigger issues. Concerns about human rights and gender equality are higher in the Middle East than in the West.

Though there are important differences, global brands resonate with Middle East youth just as they do with their Western peers. Top draws for Middle East youth are Nokia, Sony, Toyota and Toshiba, and these brands enjoy similarly high levels of popularity in the West.

Despite having less experience of international travel, young people in the Middle East are just as interested in the idea of traveling the world as those in the West. Europe is the top destination for both sets of young people, but after that Western youth prefer Australia and the US whereas young people in the Middle East favour the Gulf and Levant countries.



Middle East and Western youth have some similar beliefs – for example, they both look up the most to family and friends. But there are significant differences. In the Middle East, 68 per cent of youth say that religion defines them as person, compared to just 16 per cent in the West. Unlike Western youth, young people in the Middle East claim to look up to people in most positions of authority, including business and religious leaders, and even politicians.

Middle East and Western youth share many similar career aspirations. Young people in the Middle East would appear to have a leaning towards technical career paths, such as engineering, while Western youth are more drawn to the humanities and law. More young people in the Middle East aspire to be politicians than do their counterparts in the West.

Importantly, young people in the Middle East and West have different definitions of success. Both groups rank having a healthy family as important, but 26 per cent of Western youth define success as having money and a good career as compared to 12 per cent in the Middle East.

In contrast, 11 per cent of Middle East youth say success is being enlightened spiritually and 34 per cent say it is about making the world a better place, compared to only 5 per and 12 per cent respectively in the West.

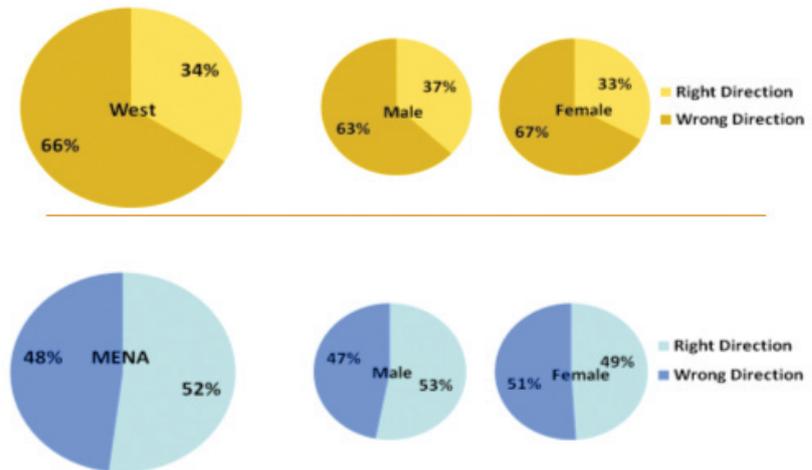
General Attitudes

Optimism versus pessimism

When the research for the First ASDA'A Burson-Marsteller Arab Youth survey was carried out in September 2008, young people in the Middle East were more positive about the state of their country than their peers in the West. More than half (52 per cent) answered yes to the question 'Do you think things in your country of residence are going in the right direction?'.

Western youth are generally pessimistic about the future, while Middle East youth are optimistic

Q: Do you think things in your country of residence are going in the right direction or are they going in the wrong direction?



Youth in the West were considerably more pessimistic, with two thirds believing their country was heading in the wrong direction. Inevitably these views reflect the comparatively bleaker economic situation of the West, which fell into recession sooner than emerging economies in the Middle East. Prior to the global economic downturn of 2007 / 2008, Gulf residents had enjoyed uninterrupted growth and therefore displayed greater residual optimism.

Interestingly, respondents in Egypt do not share the optimism of their Gulf peers; 70 per cent of youth there believe things are heading in the wrong direction. Kuwait was the only Gulf country with a majority of respondents (54 per cent) agreeing with their Egyptian counterparts.

Global challenges

Arab and Western youth agree that the single largest challenge facing the world today involves money. Both put the economy and cost of living in their top three.

Youth in the West listed the economy, cost of living, climate change, the widening gap between rich and poor, and crime as the top five challenges facing the world. The top five for Arab youth were the rising cost of living, corruption in government and public life, the state of the economy, the loss of local values and culture, and ongoing Middle East conflicts.

Cost of living was the dominant concern in Saudi Arabia, Kuwait, UAE and Jordan. The largest segment of respondents in both Egypt (23 per cent) and Qatar (19 per cent) highlighted corruption as the biggest challenge facing the world today.

In the Middle East, climate change was only rated as a serious global issue in the UAE and Qatar (among eight and four per cent of respondents respectively), arguably a reaction to the breakneck pace of real estate construction and mounting traffic congestion in both countries.

Asked to describe their personal opinions on a variety of issues, 51 per cent of Middle East respondents said they were 'very' or 'somewhat concerned' about 'climate change and the environment', versus 79 per cent in the West. The major worry for Arab youth is unemployment, with 75 per cent of respondents saying they are 'very' or 'somewhat' concerned, followed by the cost of living.

Arab youth appear to be concerned about the lack of freedoms taken for granted in the West; 71 per cent are 'very' or 'somewhat concerned' about human rights. A larger percentage of respondents in the Middle East than in the West are also concerned about gender inequality and the role and place of women in society. Unsurprisingly, gender inequality is the biggest concern among Saudi youth in the Middle East, with 71 per cent saying they are 'very' or 'somewhat concerned'.

Opinions among Arab youth on issues such as corruption and the gap between rich and poor differ country by country. The wealthier and more modern Gulf states are understandably less concerned than Egypt and Jordan about income disparities and the level of accountability in government and public life.

A question of priorities

The First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008 asked respondents to rate different issues as 'very important' or 'somewhat important'. These issues varied from access to employment to the fear of terrorism, from the freedom to travel to the value of living in a democracy.

For youth in the West, being able to find employment, earning a fair wage, and having access to reliable healthcare were rated as 'very important' or 'somewhat important' by the highest proportion of respondents, 98 per cent in each case.

Somewhat counter intuitively, maintaining a close relationship with family was rated as 'very important' or 'somewhat important' by 95 per cent of Western youth, as compared to 83 per cent of young people in the Middle East.

Even though people in the Middle East are much more likely to be victims of terrorism than those in the West, a higher proportion of Western youth, 90 per cent, described 'living without fear of terrorism' as 'very' or 'somewhat important' compared with 78 per cent of Arab youth in the survey.

Of most importance to Arab youth surveyed were 'having economy security', 'having good infrastructure like Internet and electricity' and 'living in a safe neighbourhood'.

The importance of 'living in a democracy' drew a mixed response from Middle East youth. Only 58 per cent of UAE respondents and 68 per cent of youth in Qatar described it as 'very' or 'somewhat important', arguably a reflection of the large expatriate populations in these countries, compared with 93 per cent and 95 per cent in Egypt and Jordan respectively.

Arab youth attitudes divide along national lines on issues such as education, healthcare and personal fulfillment, representing the significant income and lifestyle disparities across the Middle East. 'Having the same opportunities to succeed as everyone else' was rated 'very' or 'somewhat important' by 100 per cent of respondents in Egypt and Jordan, but only by 47 per cent in the UAE. Having access to reliable healthcare and the best universities are also prioritised by Egyptian and Jordanian youth, but appear to be taken for granted by their more privileged Gulf neighbours.

Travel, interests and lifestyle



Corresponding behaviours

According to the First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008, Arab and Western youth are much the same in terms of their hopes, fears and behaviour. Arab and Western youth both want 'to travel the world'; they admit to always texting friends and family, and to spending more and more time on social networking sites and blogs. They also feel equal pressure to conform to society's perception of how they should look, and constantly worry about their weight and appearance.

There are, however, marked differences. National identity is more important to Arab youth than young people in the West. And Arab youth appear more worried about finding true love. They are also much more concerned about the growing generation gap between themselves and their parents, an issue across all six Middle East countries in the survey. On a lighter note, Arab youth have an even greater appetite for celebrity gossip than their Western counterparts.

More than a third of Arab youth have never travelled abroad, compared to a quarter of youth in the West. Closer examination shows that Arab youth in the Gulf travel widely while their Egyptian neighbours stay at home. More than 70 per cent of Egyptian youth have never travelled abroad. Like young people in the West, Arab youth display a sense of adventure, with 76 per cent either 'very' or 'somewhat interested' to travel.

Travel bug

Both Western and Arab youth are most interested to travel to Europe. Levant and North Africa countries, home to large numbers of migrant families living in the Gulf, are also popular travel destinations for Arab young people.

Thailand, Malaysia, Australia and New Zealand rank as emerging tourism destinations for Middle East-based travellers, which is doubtless a result of the growing international network of Middle East airlines. Improved infrastructure and large disposable incomes are fueling this urge to explore. Interestingly, the same proportion of Arab youth interested in visiting the Far East, one in 10, are interested in traveling to Brazil.

The United States, an established centre of quality higher education, remains a popular draw for Arab youth; 35 per cent of those surveyed said they were keen to go there.

Fashion victims

Fashion – more specifically, clothes and footwear – is the main item on which Arab and Western youth spend their disposable income. Fashion is top of the list of every Arab country surveyed, except Qatar, where 48 per cent of respondents said their first priority is to save money for themselves or their family. But fashion wasn't far behind on the peninsula either, garnering 46 per cent of the vote from respondents.

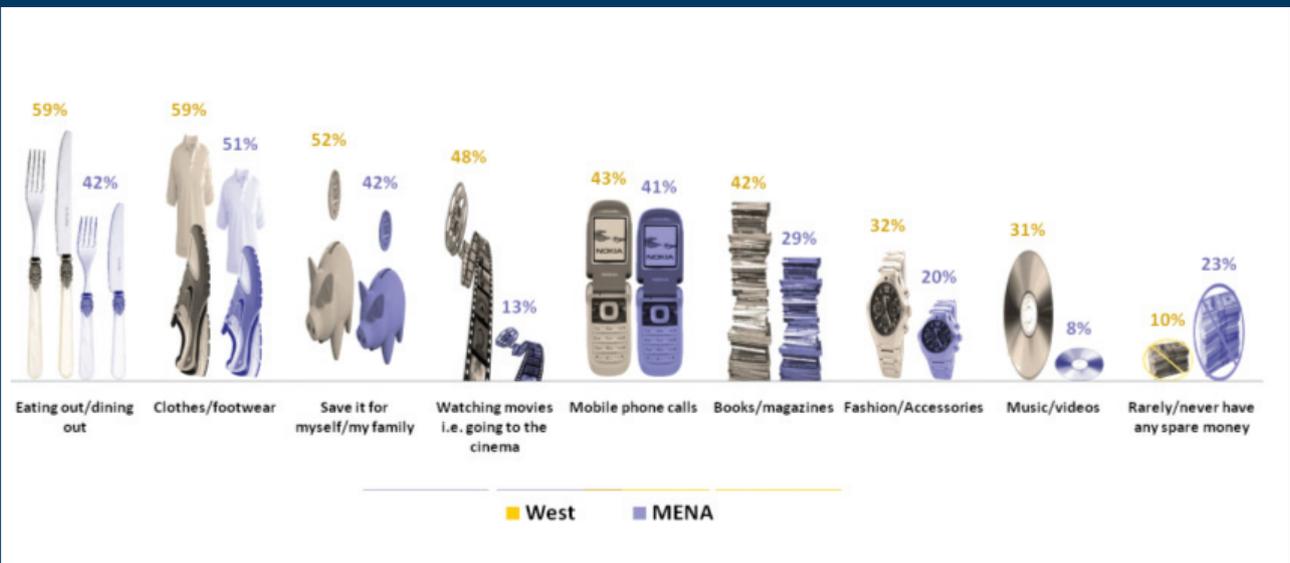
Spending on mobile phone calls was the second priority for youth surveyed in Egypt, Jordan and Kuwait, and third on the list in Saudi Arabia and the UAE where dining out was considered more popular.

Interestingly, 42 per cent of young people in the six Middle East countries surveyed prioritise saving, a figure which suggests Arab youth have more maturity than they are often given credit for. Saving outweighs expenditure on mobile phone calls, going to the cinema, books and magazines, and even music and video.

Of equal importance, illustrating the disparity in disposable incomes between different Arab countries, is the fact that nearly a quarter, 23 per cent, of Arab youth admit to rarely or never having any spare money.

Consumer and lifestyle habits of Arab and Western youth are strikingly similar

Q: What do you spend your money on?



Web-wise for news

While Western youth rely on TV, the Internet is the most important source of news information for young people in the Middle East. On average, 67 per cent of youth in the six Middle East countries surveyed claim to get their news online, while TV is the second most important source. Newspapers rank third, with 46 per cent of respondents identifying them as their main source of news. With just 15 per cent of the votes, magazines are of least importance to Arab youth.

The Internet appears to be most influential in Egypt and Jordan, with 89 per cent and 82 per cent of youth respectively saying they get their news online. TV is also strong in Jordan and the UAE. As one might expect in the Middle East, which trails the West in press freedom, the grapevine remains a dependable source of news.

This trend is particularly notable in Jordan and Saudi Arabia, countries associated with strict media censorship: 57 per cent of youth in Jordan and 51 per cent in Saudi Arabia get their news from 'friends and family'.

In the West, 81 per cent of youth get their news from TV, and like their Arab peers they rate the Internet, newspapers, and friends and family highly as news sources. But only one per cent claim to have no interest in news, compared to a fifth of Arab youth. In the UAE, 43 per cent describe themselves as 'not interested in news'. Kuwait and Qatar also demonstrate high rates of apathy when it comes to news information. In contrast, Egypt-and Jordan-based youth have large appetites for news, with only four per cent claiming to have no interest.

Relative indifference to current affairs

In the West, according to the First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008, 58 per cent of youth update themselves on news and current affairs several times a day or every day. In the Middle East, the figure is 35 per cent.

Given that the Middle East dominates the global news agenda, it would be pertinent to explore the relative indifference of young people in the Middle East towards news and current affairs. Are the reasons rooted in the quality and availability of education, political disenfranchisement, or is the apathy of Arab youth an understandable response to news 'overkill'?

Youth in Egypt appear to be the hungriest for news information, with 39 per cent getting news updates several times a day or daily. Qatar is second, and Saudi Arabia ranks last, with 28 per cent of respondents updating themselves on news and current affairs several times a day or daily.

Tech-savvy generation

Although youth in the Middle East have less access to personal electronics than their peers in the West, they are quickly catching up. Mobile phones are de rigueur for both Arab and Western youth, with 68 per cent and 84 per cent of respondents respectively saying they have exclusive use of one. Access to desktop computers is also high: 61 per cent of Western youth and 41 per cent of Arab youth claim to have exclusive use of a desktop PC.

The greatest disparity is seen in ownership of digital audio players, which arguably reflects cultural as well as income and spending patterns. Pop music is largely an Anglo-American phenomenon, after all.

In the survey, 64 per cent of Western respondents said they had access to iPods and MP3 players, compared with 17 per cent in the Middle East; 49 per cent of Western youth and 13 per cent of their Arab peers have access to games consoles; and access to laptop computers is 66 per cent in the West and 34 per cent in the Middle East.

According to the survey, Jordan has the highest rates of mobile phone ownership, the UAE has the highest ownership of laptops – at 53 per cent – while Egypt leads the field for desktop computers and, surprisingly, high-tech telecommunications. In Egypt, 27 per cent of respondents claim to have exclusive use of a Web-enabled mobile phone or iPhone, followed by 25 per cent of youth in Saudi Arabia. The UAE is the definite Middle East hub for Blackberries and push-email technology: 16 per cent of youth polled there claim to have their own BlackBerry, Treo or equivalent brand.

Increasing web dependency

According to the First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008, 96 per cent of Western youth log on to the Web at least once a day; 86 per cent of Arab youth visit the Internet just as often, and nearly half of them log on at least several times a day.

Internet usage in the six Middle East countries polled is consistently high: the percentage of respondents logging on at least several times a day ranges from 53 per cent in Saudi Arabia and the UAE to 45 per cent in Kuwait. The percentage of youth logged in all day varies from 20 per cent in Saudi Arabia to 14 per cent in Kuwait and Jordan. Clearly, these statistics suggest that well-conceived online communications campaigns can reach youth effectively across the Middle East, not just in the wealthier Gulf states.

Divergent trends online

Email is by far the most popular online activity for both Arab and Western youth. Personal searches for information, social networking, and reading news online are also popular activities among both sets of youth. Elsewhere on the Internet habits diverge.

Only 11 per cent of Arab youth use Internet banking – compared with 51 per cent of Western youth – and 28 per cent of Arab youth shop online compared with 53 per cent of their Western peers.

Uploading videos, photos and music is a significantly more popular activity for Arab youth than for their Western peers. The Internet is also a much more important tool in the Middle East for meeting new people and romance. Interestingly, more than a third of Arab youth use the Internet for 'dating and meeting new friends', compared with 10 per cent in the West. Downloading music and information, and online gaming are also more popular online activities for Arab youth.

Breaking down the Middle East data indicates that UAE-based youth are the most avid online gamers, downloaders of music and shoppers, while youth in Egypt are the loneliest hearts. Youth in Jordan are the biggest emailers and the most avid social networkers. Their peers in Egypt and Saudi Arabia also devote much of their time online (51 per cent) to social networking. And while Internet banking is in its infancy in the Middle East, youth in Saudi Arabia appear to be blazing a trail: nearly a quarter of respondents there said they bank online.

Brand loyalties

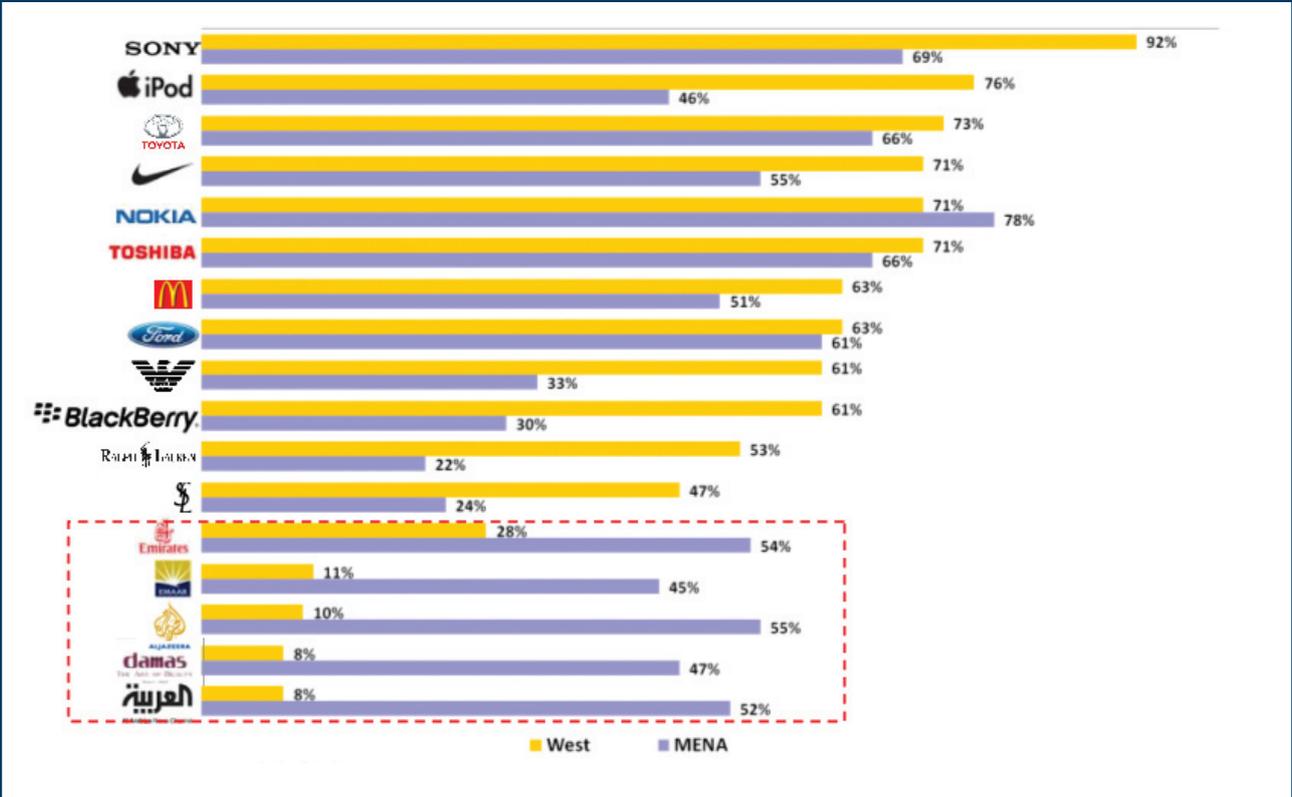
Millennials are an increasingly influential consumer group by virtue of their number, purchasing power and relatively high levels of leisure time. Their influence is set to grow as they advance in their careers and start families. Understanding their brand loyalties and purchase decisions offers potentially lucrative insights to marketers and the business community alike.

The First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008 explored attitudes towards international brand names across luxury fashion, consumer electronics, mobile telecommunications, cars and fast food. Attitudes towards emerging Arab corporations, including Emirates airlines, Damas jewellery, the international TV news networks Al Jazeera and Al Arabia, and Emaar Properties were also evaluated.

The survey found high levels of 'favourability' among both Arab and Western youth towards global brands. Doubtless reflecting the close attachment to the mobile phone in the Middle East, where penetration rates in some countries exceed 100 per cent, an even greater percentage of Arab youth are favourable towards leading mobile brand Nokia than Western youth. Japanese brands Toshiba and Toyota are also receive high ratings among Arab youth.

Global brands have transnational appeal among Middle East and Western youth

% of people FAVOURABLE towards the following brands:



Though popular, Apple’s iPod has yet to generate the massive following it enjoys in the West in the Arab world, according to the survey, which may reflect the smaller Middle East fan base of the US- and UK-dominated pop music industry.

Perhaps surprisingly, given the recurring consumer boycott campaigns against US products in response to political events in the Middle East, Arab youth were found to be as favourable as their Western counterparts to American automobile icon Ford. Does this suggest that Arab youth do not see a relationship between brands and politics?

According to the survey, Nokia, Sony, Toyota, Toshiba and Ford all poll the highest ratings among youth in Egypt. Sports brand Nike enjoys the most appeal in Jordan. McDonald’s enjoys very even favourability across the Middle East countries polled, from 55 per cent in Saudi Arabia to 46 per cent in Qatar either ‘very favourable’ or ‘somewhat favourable’ towards the brand.

Among the survey’s chosen Middle East brands, Emirates airlines, Al Jazeera TV and Al Arabia TV post favourability ratings of 54 per cent, 55 per cent and 52 per cent respectively among Arab youth. In the West, 28 per cent of youth said they are ‘favourable’ towards Emirates.

Al Jazeera, Al Arabia and Emirates airlines all enjoy their highest favourability in Egypt and their lowest scores in the UAE. In the UAE, 38 per cent of youth are ‘very favourable’ or ‘somewhat favourable’ to homegrown property giant Emaar, while the brand enjoys its highest rating of 55 per cent among youth in Jordan.

Generally, mass market international brands enjoy higher favourability among youth than luxury brands. Armani, Yves Saint Laurent and Ralph Lauren appear to have the highest favourability among youth in the wealthier Middle East countries of Saudi Arabia and the UAE.

Education and career

Transforming the classroom

Suggesting a high level of disengagement with the education process, 33 per cent of Arab youth describe education as 'a means to an end', compared to just 7 per cent of Western youth. Compared to their Western peers, Arab youth do not make a strong connection between school and the workplace. Only 20 per cent of Arab youth, compared to 54 per cent in the West, see education as a 'stepping stone to a career', while 21 per cent take a broader view of schooling, considering it a means to educate themselves about the world.

Attitudes towards education are consistent across the six Middle East countries, though youth in the UAE appear more career-minded, in line with their Western counterparts. In the UAE, 28 per cent of youth polled see education as 'a stepping stone to a career'.

There appears to be a consensus among Arab youth on the improvements needed to the education system. The vast majority, 86 per cent, want school curricula to be more relevant to the needs of the workplace. Nearly 80 per cent of Arab youth want more focus on religious studies; around three quarters want more lessons in English; and 68 per cent want to see more teaching of Middle East history.

Youth in Egypt, Jordan and Saudi Arabia see a desperate need for more teaching of skills valuable in the workplace. A staggering average across the three countries of more than 96 per cent is either 'very favourable' or 'somewhat favourable' towards the idea.

Youth in Egypt, Jordan and Saudi Arabia also strongly favour more religious education, though UAE-based youth are relatively ambivalent. Youth in Saudi Arabia and Jordan show the strongest support for more lessons in English, though only Jordan has a majority in favour (56 per cent) of teaching all lessons in English.

Arab youth are proud of their national heritage and want to see more teaching of Middle East history; 89 per cent of youth in Egypt are either 'very favourable' or 'somewhat favourable' towards the idea of history lessons 'specific to my country and region'.

Career expectations

Both Arab and Western youth believe 'job satisfaction' is the most important criterion when applying for a job, with 75 per cent and 74 per cent describing it as 'very important'. Good pay and opportunities for personal development are also rated highly by both sets of youth. However in general, Western youth appear more interested in self-fulfillment when it comes to the workplace, while Arab youth are more motivated by the broader contribution of ideal employers. Nearly two thirds of Arab youth believe 'working for a company that does good in the community' is a very important factor when applying for a job, and 65 per cent prioritise 'the opportunity to contribute to the development of my country'.

In the six Middle East countries surveyed, 66 per cent of youth identified 'the opportunity to work with talented people' as very important when applying for a job, compared with 32 per cent in the West.

Gender issues

Young Arab men and women generally share the same attitudes towards career and the workplace; 41 per cent of both men and women believe they have more opportunities available to them than their parents, and 44 per cent of men and 42 per cent of women believe men and women have equal opportunities in the workplace.

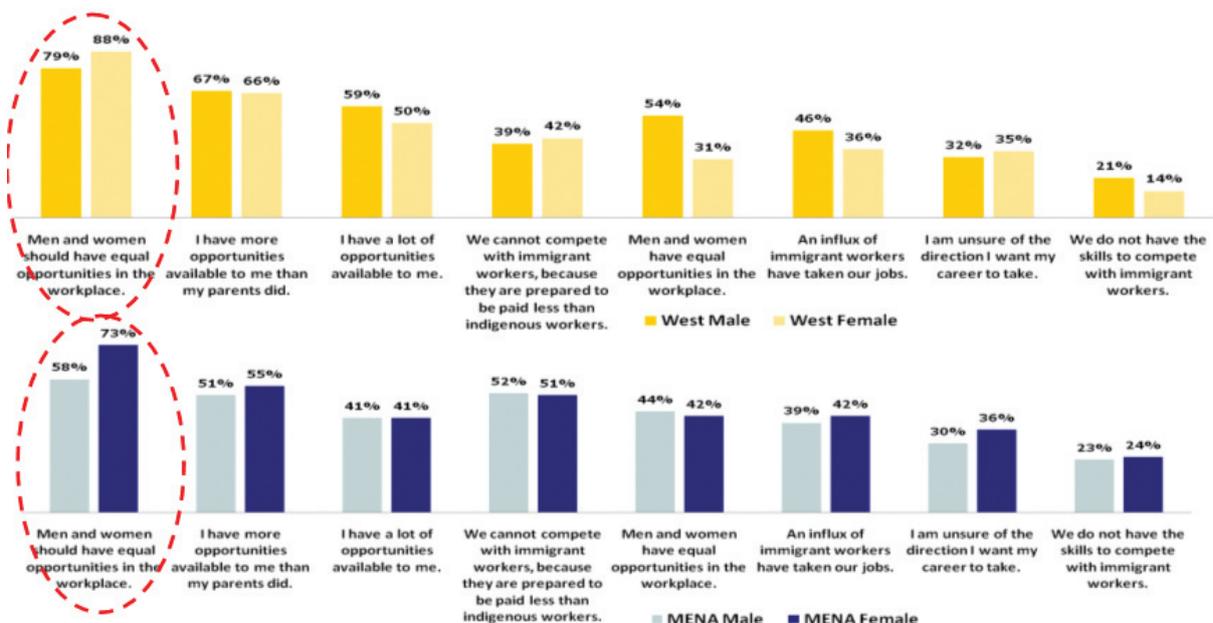
Young Arab men and women also share similar concerns about the role of immigrant workers; 39 per cent of men and 42 per cent of women believe 'an influx of immigrant workers have taken our jobs'. Around a quarter of young Arab men and women also feel they lack the necessary skills to compete with immigrant workers.

Unsurprisingly, young men and women in the six Middle East countries surveyed disagree on the opportunities to be made available to both genders in the workplace, though the margin of disagreement is smaller than one might expect. According to the survey, 73 per cent of women believe men and women should have equal opportunities in the workplace. That view is shared by 58 per cent of men.

Youth in Kuwait are the most optimistic about their careers, with 51 per cent saying they have 'a lot of opportunities'. Youth in Egypt appear to be at the greatest disadvantage; only 36 per cent agree they have a lot of opportunities available to them, and only 36 per cent believe they have more opportunities than their parents did.

Arab and Western male youth have very different opinions about gender equality in the workplace

Q: How far would you say that you agree with the following statements, where 7 is agree completely and 1 is not agree at all? (% 57- agree)



Values and beliefs



The importance of faith

The First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008 found that faith, family and friends are centrally important to young people in the Middle East. More than two thirds of Arab youth surveyed said that their faith defined them as a person. Only 16 per cent of Western shared the same view.

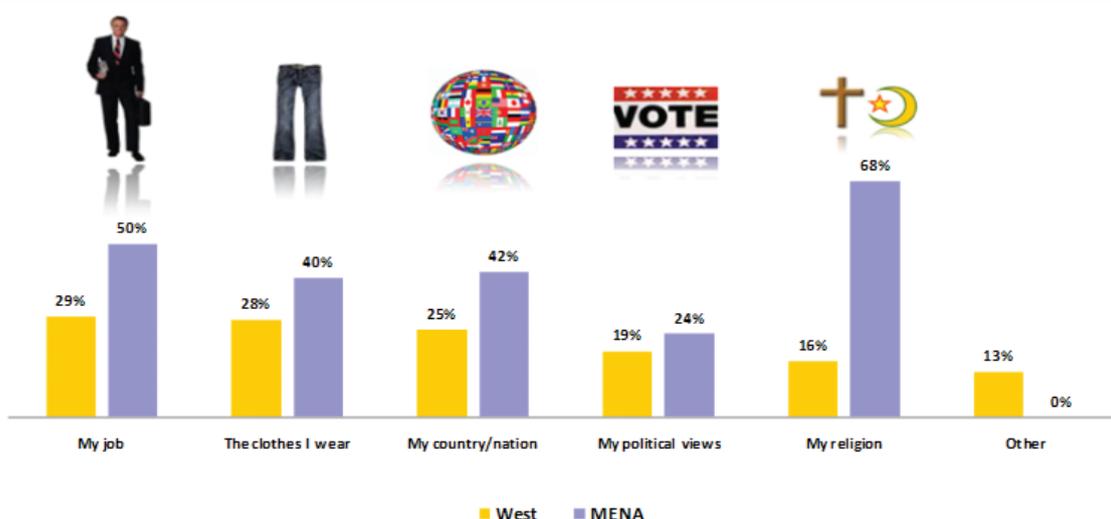
Faith is the most important defining factor among youth in all six Middle East countries, followed by family and then friends. Religion and relationships appear to dramatically outweigh the importance of patriotism or feelings of national pride. Astonishingly, Arab youth rank country/nation alongside the clothes they wear in terms of importance as a defining characteristic. Their political views are of least importance.

Both Arab and Western youth view family, friends and teachers as important role models. But less than one tenth of Western youth look up to political leaders, and government, religious and business leaders are regarded even more suspiciously. Western youth are also dubious about celebrities, with only 11 per cent saying they 'look up' to them.

By comparison, youth in the Arab world hold government, religious and business figures in considerably higher regard. Roughly a third of Arab youth polled said they look up to government, religious and business leaders, as well as senior colleagues at work. Arab youth are also slightly more impressed with celebrities, with 13 per cent saying they look up to them.

Religion is enormously important to Middle East youth, especially when compared to their Western peers

Q: Which of the following would you say defines you as a person?



Music versus religion

Arab and Western youth share many of the same attitudes and behaviours, but they have completely contrasting views on music and religion.

Nearly two thirds of Western youth surveyed claim that music has a 'very' or 'quite influential' impact on their outlook on life. More than 60 per cent of Arab youth have the same attitude towards religion, though the level of influence varies: 84 per cent of youth in Egypt describe religion as 'very influential', compared with 27 per cent in the UAE.

Surprisingly, youth in Jordan appear to attach more importance to religion than their counterparts in Saudi Arabia; 71 per cent view religion as 'very influential' compared with 56 per cent in the Kingdom.

Youth in Egypt may feel the most strongly about their faith, but they are also the most passionate about their music collection among Arab youth; 23 per cent of youth polled there say music has a 'very influential' impact on their outlook on life. Arab and Western youth agree on the importance of family, citing family as the most important influence in their lives. Friends, the media, writers and politicians are also seen to be a significant influence by both sets of youth.

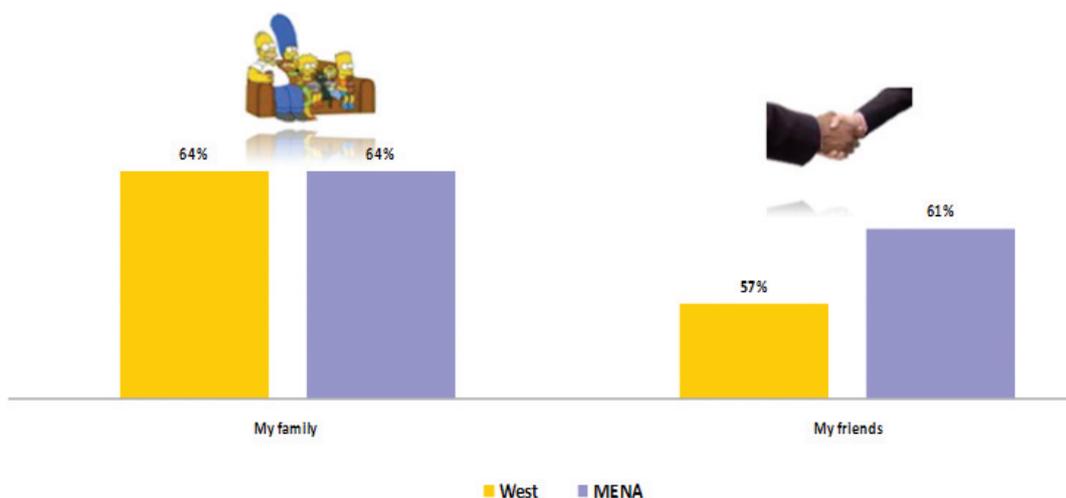
The importance of tradition

Fashion dominates the purchasing decisions of both Arab and Western youth, but both groups consider personal appearance to be secondary to 'who they are as individuals'.

The majority of respondents believe in traditional values, with 85 per cent of Arab youth and 60 per cent of Western youth agreeing that it is important to preserve traditional values for the future.

Family and friends are equally important to Middle East and Western youth

Q: Which of the following would you say defines you as a person?



Contrary to the carefree stereotype of young people, three quarters of young people in both the Middle East and West admit to thinking about the future as well as the present and to ensuring they save money. In Kuwait, 79 per cent of youth surveyed prioritise saving for the future compared with 70 per cent in Saudi Arabia. Unsurprisingly, youth in the UAE are the most image-conscious; 62 per cent would rather spend their money on other things than their appearance compared to 80 per cent in Kuwait.

Defining success

According to the First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008, both Arab and Western youth define success as having a 'happy and healthy family'. But a larger proportion of Arab youth, 34 per cent, describe it as 'making the world a better place'.

More Western youth equate earning money with success, 12 per cent versus 5 per cent in the Arab world. Only four per cent of Arab men and eight per cent of Arab women believe success is finding true love, compared with 17 per cent of men and 14 per cent of women in the West. Around a tenth of Arab youth define success as 'being enlightened spiritually', compared with 5 per cent of Western youth.

Having a happy and healthy family and making the world a better place are the two most important definitions of success for Arab in all six Middle East countries surveyed.



Conclusion

Coming of age in the post-crisis world

Since ASDA'A Burson-Marsteller carried out its First Annual Arab Youth Survey, the world has changed dramatically in the interim. The financial crisis that began in the United States has had a profound impact on economies across the globe, and on the hopes, fears and aspirations of just about everyone, including members of the millennial generation.

In both the West and Middle East, the prevailing mood is now one of pessimism. More than any generation before them, today's youth are hyper-aware of the challenges that face them in this period of global uncertainty. As a result, their trust in figures of authority and prevailing social and economic systems is being put to the test. They are skeptical that modernity's fundamental promise of progress – that their lives will be better than those of their parents – will be met.

This global crisis of confidence will inevitably alter the habits, opinions, tastes and values of young people in the Middle East and the West. Yet just how that change will be realised remains to be seen.

Historically, of course, great crises have led to a long-term reshaping of the political, financial and social order. They have changed the landscapes of cities and countries, altered demographic patterns and fostered the rise of new technologies. This crisis will be no different.

Consider that the generation of Americans who came of age in the Great Depression tended to be more frugal, self-sacrificing and conservative than their immediate predecessors. But the conservatism of their worldview was tempered by political liberalism: as a consequence of witnessing extreme poverty, they believed much more strongly in the role of government. Likewise, that generation placed greater emphasis on the value of education, and on the traditional values of family.

Looking ahead to the Second Annual Arab Youth Survey 2009, we will ask how the millennials feel about the great challenge of their lifetime – and how their values have changed in the past 12 months. We are eager to capture those insights, and to share them with you.



Mark Penn, Global CEO, Burson-Marsteller



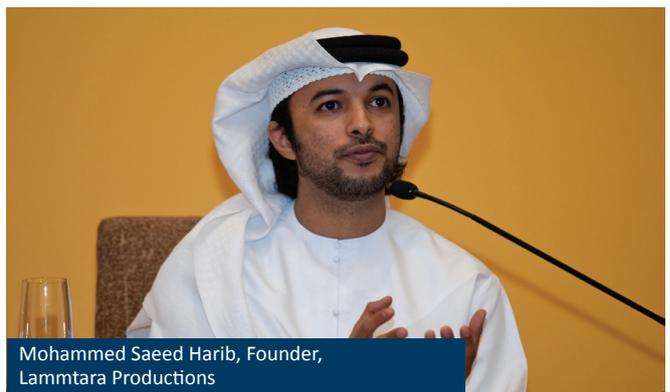
Mohamed Alabbar, Chairman, Emaar Properties and Dr. Maisah Sobaihi, academic and playwright



Hassan Fattah, Editor, *The National*



Sunil John, CEO, ASDA'A Burson-Marsteller



Mohammed Saeed Harib, Founder, Lammtara Productions



APPENDIX

Voices from the region

At the launch of the First Annual ASDA'A Burson-Marsteller Arab Youth Survey 2008, four panellists were invited to respond to the top findings of the report and to debate two core issues:

1. What is the greatest challenge facing Arab youth today and what needs to be done to address those challenges?
2. Will Arab youth become more like Western youth in due course, in terms of their values and outlook? Is this good or bad?

The following extracts were taken from the discussion:

Harnessing optimism

Mohamed Alabbar
Chairman, Emaar Properties

Mohamed Alabbar is founding member and chairman of global real estate company Emaar Properties, and an advisor to His Highness Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai. Mr. Alabbar is a graduate in Finance and Business Administration from Seattle University in the United States.

“The challenge of Arab youth lies in its optimism. Many countries in the world would love to have that level of optimism. But we have to meet that optimism.

“I started my career here in the Middle East by criticizing everything, when there was very little to criticize. Times have changed. Today, we have leaders who are trying hard to move their societies forward, to improve the quality of life, to satisfy the optimism and ambition of their young people.

“The challenge of optimism has to be met primarily at the government level. We need to implement the right policies to ensure that young people have access to the best education, supportive economies and a creative platform. We must provide the opportunities for them to use their skills.

“Economic policies should give people – particularly young people – the freedom to act, to think, and to follow their dreams. That is what motivates men and women to aspire to do more in life.

“If we can meet their optimism, we will be able to drive economic and social development for our nations and our region. By managing and motivating our youth, and giving them the tools, freedoms and opportunities they need, we will be able to bring about a new era of prosperity and stability.

“It’s not only governments who have a role to play. Families and communities are critical. Together, we need to enlighten our youth while exposing them to all the modern technologies and possibilities the world has to offer.

“We do not need to fear globalization. In fact, I think it’s a good thing. The more we come together through technology, education, the media, the workplace and the marketplace of ideas, the better the world will become. Provided our foundations are secure, our identity and culture will remain. If we can give our young people strong roots and strong wings, we will have fulfilled our responsibility.”



Identity, culture and heritage

Mohammed Saeed Harib
 Founder, Lammtara Productions

Growing up in Dubai, Mohammed was raised on a diet of American and Japanese cartoons. In 2005, Harib launched *Freej* (Neighbourhood), an animated situation comedy celebrating the culture and traditions of the UAE. Told through the eyes of four Emirati grandmothers living in an old neighborhood in the heart of modern Dubai, *Freej* was an instant hit. Now in its third season, the show has been broadcast across the Gulf countries and has a strong following among UAE nationals and expatriates alike.

"I think the greatest challenge for Arab youth today is finding themselves within the multicultural transformation that's happening all around them. A lot of UAE nationals and young Arabs struggle to discover their identity, because they are very proud of their culture and don't want to lose sight of it in the face of increasing globalization.

"It's a balancing act. We try to learn from the best of the world who come here and at the same time we're trying to find ourselves. We want to embrace globalization, use the latest technology and be ambitious in the workplace, but retain our values and traditions and show our culture to the world.

"I think one of the reasons *Freej* is so successful is because people thirst for culture, they want a reference point to remind themselves and future generations who we are, how we lived and the values that define us, and to preserve these things for the next generation.

"We need cultural pillars that we can continually refer back to – that is lacking. I was shocked to read that the number one destination for visitors looking for culture in Dubai is the Madinat Jumeirah resort. We need to work a little harder to discover our culture and protect it.

"In the West, it seems people rely heavily on the media to learn about the outside world. I found that to be true when I lived in the United States, I found it difficult to explain where I was from.

"In our educational systems, we grow up reading about the exports of Congo, and its imports. We learn a lot of things about many other countries, but not a lot about where we come from. I know all of the American states, all the countries in Europe, but I know very little about the small villages and towns inside my country.

"That is changing now. The West was educating children with cartoons long before my country was even created. I grew up watching Japanese and American animation, I saw New York before ever going to New York. I saw sushi 15 years before I ate it. I learned a lot about the culture of many countries because the media did a great job of showcasing those cultures. Little was known about us because we did not have the time to research us and find out more about our values and heritage.

"Today, *Freej* is the first 3D animation series in the country and in Arabia. We should do more of that, use media to support our values and our mission, and use it to bridge cultures, to show others who we are from our own perspective."



Discovering other cultures

Dr. Maisah Sobaihi
Professor, playwright and actor, Saudi Arabia

Dr. Sobaihi is an assistant professor at the King Abdul Aziz University in Jeddah. She is best known for her work in theatre and the arts across Saudi Arabia. She has co-hosted a television series on Muslim women around the world, served as a Fulbright scholar, and led drama and theatre workshops representing young Saudi and Arab women at international forums.

"I think the greatest challenge to the Arab youth is in integrating with the outside world while maintaining the identity, religion and values they strongly believe in.

"From where I stand, you can see the walls are coming down. The way Arab and Western cultures perceive each other is definitely changing, particularly among the youth. There has undoubtedly been a positive change following the election of Barack Obama, and young Arabs view the United States with a greater sense of faith.

"There's more eagerness to know more about the West. Sometimes, no doubt, there's anger, some resentment, but I see more of an understanding evolving, and that is good news.

"Globalization is inevitable, Western influence is a given, but I think we may start seeing Arab youth affecting their peers in the West as well. Education is vital to this exchange: the more education our youth receive, the more interaction there will be. That interaction will bring about its own learning curve. The important thing is not to fear globalization but to accept it. That is when family values and cultural values emerge – when they are tested.

"It's important for mainstream society to be involved in cultural integration. Government support alone will not be enough."



The generation gap

Hassan Fattah
Editor, *The National*

Hassan Fattah is the editor of *The National*, the daily newspaper published in Abu Dhabi. Hassan was previously the Middle East correspondent for the *New York Times*. He also co-founded *Iraq Today*, Iraq's first post-Saddam English newspaper. His work has appeared in *Time*, *The Economist* and *The New Republic*.

"Our region suffers from a significant generation gap. The average 25-year-old today is very likely to be unmarried, is less likely to be employed and just as importantly, is very likely to be staying at home. This is creating a lot of division, especially between fathers and sons.

"As one father interviewed by *The National* put it, by day young Arab men live in the 21st century. At night, they have to come back to the 19th century. It is an issue of personal freedom. What young people really want is the ability to do what they want to do. Education plays a vital role in this, being able to attain new heights and move towards new stages in your life.

"When we started the newspapers, both here and in Baghdad, there were lots of people who were eager to contribute but didn't know how. You need to show them how, you need to set the standards and build their expectations. It can only happen through mentorship, either on an individual or institutional basis. Mentorship is such an important piece in bridging the generation gap.

"The average 18- or 19-year old in the West has to deal with a lot of issues like violence and drugs, that young Arabs don't have to think about. The average Arab 25-year old is comparatively sheltered. But at the same time, Arab youth are very aware of the world around them and the bigger political problems."



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