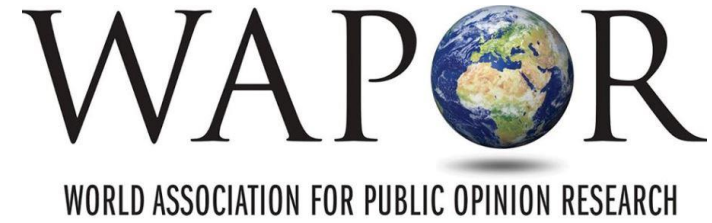




المركز السعودي لاستطلاعات الرأي
SAUDI CENTER FOR OPINION POLLING



A longitudinal view on parameters highlighting social change in Saudi Arabia

75th Global WAPOR Conference 10-13 November 2022 Dubai

Cees Faber & Saud Alghamdi



Research objectives and structure

Measuring perceptions by and impact through polling

Over previous decades Saudi Arabia has seen broad, ongoing structural social change. This paper sets out to assess the following objectives based on selected primary research:

- **Objective 1:** Highlighting Society's perceptions over time, underlining social change on a number of parameters: Entertainment, women driving, female & male employment, public health, government agency performance, and owning a house
- **Objective 2:** Illustrating how polling and surveys inform policy and its implementation

This paper explores and validates the above objectives through assessing primary data collected through polling from 2016 to 2021.



Rule Change

Vision 2030 2016
GEA 2016

Women driving 2017

Women driving
Implementation 2018

Tourism visa 2019
Guardianship law lift 2019

Primary research

2016 Entertainment I

2017 Entertainment II&III
2017 Women driving I

2018 Women driving II

2019 Vision 2030 – I

2019 Vision 2030 – II

2021 Vision 2030 - III

2021 Vision 2030 – IV

2021 Women driving III



The Saudi Vision 2030 is a framework to reduce Saudi Arabia's dependence on oil, diversify its economy, and develop public service sectors such as health, education, infrastructure, recreation, and tourism



Methodology

Sampling, limitations and challenges, about the SCOP



Random Sampling

- RDD: Random digital dialing
- National anonymous database of mobile numbers national mobile numbers
- 96% Coverage
- Arabic
- CATI
- Questionnaire design & Pilot phase
- Sample size 950– 9350
- Response rate 28 – 37%
- Saudi nationals



Limitation and challenges

- Pertinence of training
- Quality control
- Analysis
- Descriptive statistics +
- Reweighting
- Error margin 1.2 – 3.2%



The Saudi Center for Opinion Polling

- Contributing to building a knowledge base for public opinion and its trends, through surveys, analysis, studies, consultancy, and training programs based on best practices and scientific methodologies
- Political, economic, social
- 2016, Not-for-profit organization
- 350 Studies, 56 staff
- Impact, science, independence



Methodology continued

Sampling parameters: Study, size, error margin and response rate



10 studies conducted through telephonic surveys, with sample size ranging between **950** and **9,350** over the span of **5 years**

Study	Women Driving			Entertainment			Vision 2030			
When	Sep 2017	Apr 2018	Dec 2021	Nov 2016	Feb 2017	Apr 2017	Feb 2019	May 2020	Feb 2021	Nov 2021
Sample	9,350	3,118	1,679	2,061	950	2,833	2,002	1,986	3,526	2,822
Error margin	1.2%	1.8%	2.4%	2.5%	3.2%	1.8%	2.2%	2.2 %	1.7%	1.9%
Response rate	75%*	66%*	28%	Avg. 46%*	Avg. 46%*	Avg. 46%*	32 %	34 %	41%	37%

* Before adopting AAPOR's response rate calculation in 2019



Women driving

Series of studies aimed at gauging society's perception toward women driving

Percentage of people supporting women driving **before** and **after** implementation:

2017
45%

2018
48%

2021
92%

People were anxious

Became comfortable





Entertainment

Public mood before launching entertainment activities

Late 2016 before General Entertainment Authority activities

54%



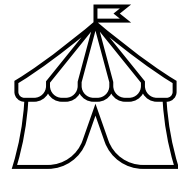
Bored

7 hours



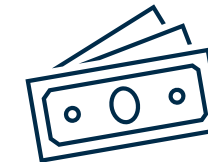
Avg. weekend free time

97%



Say it's important

471 SAR



Avg. spending

People had the time, money, and willingness to experience entertainment



Early **2017**, Following increase concerns over negative feedback from social media towards entertainment activities in KSA. SCOP conducted several studies and found that social media feedback is *relevant but not representative*

February sample size **950**

“What are the challenges facing entertainment in KSA?”

36% lack of entertainment venues

14% violations of Islamic teachings

12% pressure of social norms

April sample size **2,833**

“What are the challenges facing entertainment in KSA?”

17% lack of entertainment venues

15% there are no challenges

14% violations of Islamic teachings



Entertainment

After the General Entertainment Authority activities

Percentage of people noting an improvement in entertainment:

FEB 2019

71%

MAY 2020

86%

FEB 2021

88%

NOV 2021

89%

People were not only experiencing entertainment, they were seeing improvements in it



Vision 2030

Longitudinal study tracking society's perceptions



Study background

Continuous representative study gauging society's perception on a range of socio-economic indicators, starting 2019.

Methodology

Secondary research and Vision informing indicators.

RDD representative sampling, n=1986-3526, weighted to population, CATI, 2019 - ongoing

Question phrasing

Comparing to 'before Vision 2030', Would you say that when it comes to {INDICATOR}, the situation is: a) improving, b) declining, c) Staying the same or d) No opinion/don't know?

Vision 2030 Indicators

Female employment
Performance of government agencies
Entertainment activities
Increased accountability of abusers
Saudi Arabia's Business
Quality of public clinics and hospitals
Education in Universities
Lowering crime rate
Education in public schools
Reducing social extremism
Quality of private clinics and community hospitals
Minimizing waste of public money
Education in private schools
The opportunity to own a home
Male employment
Average

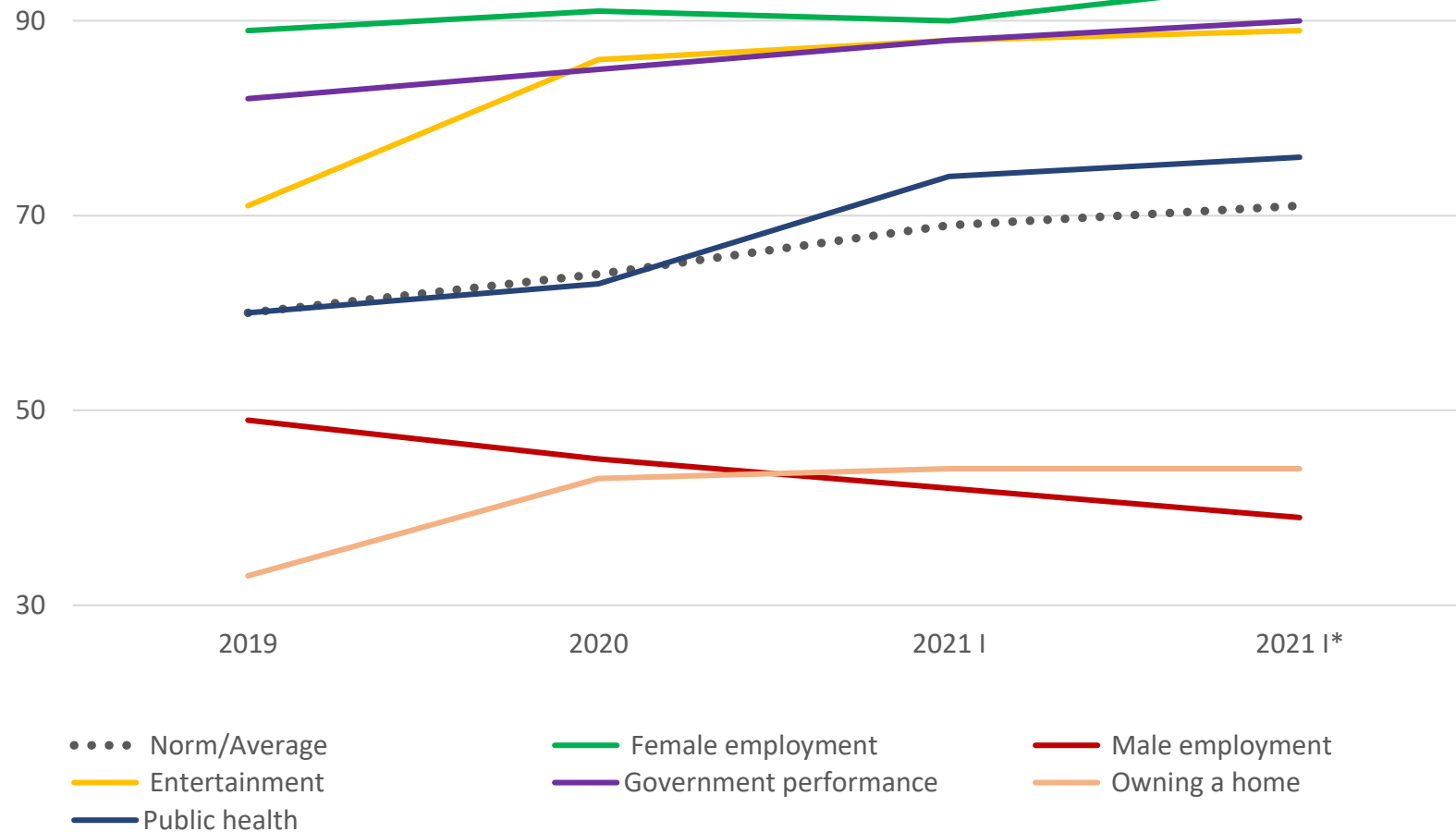


Vision 2030 continued

Longitudinal study tracking Saudi society's perceptions on employment, entertainment
Saudi business and owning a home



Percentage of
respondents
claiming
improvement
on





Conclusions and outcomes

Outcomes and discussion



Objective 1: Highlighting Society's perceptions over time, underlining social change on a number of parameters: Entertainment, women driving, female & male employment, public health, government agency performance, and owning a house

- Studies over time confirm fundamental change in Society's perceptions on entertainment, employment, government agencies, health and housing

Objective 2: Illustrating how polling and surveys inform policy and its implementation

- Polling contributed for decision makers to distinguish between relevance and representativeness

Q & A