A longitudinal view on parameters highlighting social change in Saudi Arabia

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Presentation content and structure

• Introduction and hypothesis
• Context, framework, time-line and perspective
• Methodology
• Women driving
• Entertainment
• Vision 2030
• Conclusion
• Discussion
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.
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

<table>
<thead>
<tr>
<th>Study</th>
<th>Women Driving</th>
<th>Entertainment</th>
<th>Vision 2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>When</td>
<td>Sep 2017</td>
<td>Nov 2016</td>
<td>Feb 2019</td>
</tr>
<tr>
<td></td>
<td>Apr 2018</td>
<td>Feb 2017</td>
<td>May 2020</td>
</tr>
<tr>
<td></td>
<td>Dec 2021</td>
<td>Apr 2017</td>
<td>Feb 2021</td>
</tr>
<tr>
<td>Sample</td>
<td>9,350</td>
<td>2,061</td>
<td>2,002</td>
</tr>
<tr>
<td></td>
<td>3,118</td>
<td>950</td>
<td>1,986</td>
</tr>
<tr>
<td></td>
<td>1,679</td>
<td>2,833</td>
<td>3,526</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2,002</td>
<td>2,822</td>
</tr>
<tr>
<td>Error margin</td>
<td>1.2%</td>
<td>2.5%</td>
<td>2.2%</td>
</tr>
<tr>
<td></td>
<td>1.8%</td>
<td>3.2%</td>
<td>2.2%</td>
</tr>
<tr>
<td></td>
<td>2.4%</td>
<td>1.8%</td>
<td>1.7%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1.9%</td>
</tr>
<tr>
<td>Response rate</td>
<td>75%*</td>
<td>Avg. 46%*</td>
<td>Avg. 46%*</td>
</tr>
<tr>
<td></td>
<td>66%*</td>
<td>Avg. 46%*</td>
<td>32 %</td>
</tr>
<tr>
<td></td>
<td>28%</td>
<td>Avg. 46%*</td>
<td>34 %</td>
</tr>
<tr>
<td></td>
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<td>41%</td>
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* Before adopting AAPOR’s response rate calculation in 2019
Women driving
Series of studies aimed a gauging society’s perception toward women driving

Percentage of people supporting women driving before and after implementation:

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>45%</td>
<td>48%</td>
<td>92%</td>
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</tbody>
</table>

People were anxious, Became comfortable
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:

<table>
<thead>
<tr>
<th>Month</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEB</td>
<td>71%</td>
<td>86%</td>
<td>88%</td>
<td>89%</td>
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<tr>
<td>MAY</td>
<td></td>
<td></td>
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<tr>
<td>NOV</td>
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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 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