

KSA Saudi labor force survey report

Date: June 2022





Introduction

The Riyadh BI Center for labor policies ran a survey targeting 3,000 Saudi young people to assess perceptions and behaviors along their labor journey. The survey covers a comprehensive set of questions and embeds behavioral experiments. It aims to provide an understanding of their approach to jobs' search and the challenges they face. It also delves into the societal norms that influence their education and career choices, their personal aspirations and preferences, their gender attitudes and perceptions, as well as their appetites for different types of skills training. These results will inform a series of studies that will provide a deeper understanding of the opportunities and challenges young people face in the Saudi labor market.

Preliminary insights from the survey:

- Unemployed and lower-income households are less likely to have received government benefits over the past year and are disproportionately female and younger (under 20 years old).
- The unemployed are much less likely to say they are currently in education or training but just as likely as others to say that they intend to enroll in training and education after our prompt about the value of STEM education.
- Preferences for public sector employment over private sector employment are
 driven by both material and status-based concerns. Respondents are much more
 likely to see public sector jobs as highly respected and associate them with good
 salaries, stability, and public service. The private sector shines when it comes to
 opportunities to innovate and be creative as well as to follow personal passions.
- Families play a major role in young people's job market decisions. A majority of them said they would be unlikely to take a job their family did not approve of, and many turn to family for job-search advice. This holds across gender, income, region, and employment status.
- Young women are optimistic about their job prospects most believe it is safe for women to work outside the home, that having a professional career will not harm their marriage prospects, and that they can be just as good at most jobs as men, given the same education and training. Young men are more divided.



Section 1: Overview of the Survey

The survey targeted Saudis aged 18–30. This age group is entering the labor market, pursuing training opportunities, and beginning to shape their career trajectories, making them an important target group for employment support. The survey was sent to Saudis who were registered respondents of the survey firm Ipsos. The final sample size included 3,000 young people.

The questionnaire covered a range of topics relevant to this age group and their employment. Questions covered background and demographics; educational and training history; current employment, work history, and job search activities; aspirations and perceptions of jobs across sectors; and questions to assess social norms. The survey was administered online over a three-week period in March 2022.

The survey data was weighted to be representative of the target population by age, gender, and marital status. The data was broadly representative by region, with some overrepresentation of young people in the more populous regions — e.g., rof Riyadh, Makkah Al-Mukarramah, and the Eastern Region. As we were most interested in topics surrounding employment and job training, we focused our sample on those who are either currently in the labor force or planning on joining the labor force. The sample underrepresents young Saudis who do not plan on joining the labor force. The sample is also more educated than the general population. As the survey was conducted online, all respondents had to have access to the internet to participate.

When appropriate, we disaggregated our analysis by gender, age, income, and (un)employment status to identify variations in status and possible vulnerabilities across subgroups.

Limitations

All surveys rely on respondents to report on their own attitudes and behaviors. This means that questions on sensitive topics may be susceptible to social desirability bias. Similarly, respondents may misremember details or make errors when reporting on their own behavior.

This survey is best suited to understanding the opinions of young Saudis who are of higher socioeconomic status and living in more populous regions. Subsample results, especially of respondents from small or underrepresented demographic groups, should be examined with caution due to lower sample sizes.



Section 2: Work and Benefits Status

The first section aimed to identify current trends in labor market participation.

Table 1: Employment status by age and gender

About 40 percent of the sample were employed, and 17 percent were self-employed, while approximately 30 percent reported being unemployed and looking for work (Table 1). Not surprisingly, rates of employment increased with older respondents, with those in the 26–30 age range reporting employment at rates double that of 18–20-year-olds. There are statistically significant gender gaps in both employment and unemployment. Across the sample, men were 19 percentage points more likely to be employed than women. Women were more likely to be unemployed and inactive (not employed and not looking for work) than men. Men and women reported similar rates of self-employment and student status.

	Total	Male	Female	18–20 years old	21–25 years old	26–30 years old
	%	%	%	%	%	%
Employed	41	50	31	24	39	50
Self-employed	17	20	14	16	17	18
Not employed but looking for work Not employed and not looking for	31	21	41	38	31	27
work	7	5	10	11	8	4
Student (Full-time)	4	4	4	10	4	1

Table 2: Public versus private sector employment and income

Of those who were employed, 55 percent reported working in the private sector, and approximately 30 percent were working in the public sector. The public-private split was roughly equal for men and women.

	Total	Male	Female
	%	%	%
Publicsector	29	27	33
Private sector	55	57	52



Table 3: Industry employment

Respondents in the sample worked in a range of industries. The most common were education (20%), wholesale and retail (11%), information technology and communications (10%), and healthcare and social work (8%). Women were more likely to work in education than men (17% vs. 24%). In Section 3, we explore industry aspirations and find a mismatch between current and desired employment industries.

	Total	Male	Female
Oil and gas	3	4	1
Construction and utilities	6	7	3
Wholesale and retail trade	11	12	10
Manufacturing	4	4	4
Education	20	17	24
Healthcare and social work	8	7	11
Information technology and			
communications	10	10	10
Transportation and storage	4	5	2
Finance, insurance, and real estate	5	5	5
Government, public administration, and			
defense	7	8	6
Professional, scientific, and technical			
activities	4	4	5
Tourism, arts, entertainment, recreation	5	5	4
Agriculture and Irrigation	3	4	3
Home services	5	5	5
Not working	1	1	2

Table 4: Work hours in a typical week

Of those who were employed, a majority worked at least 20 hours per week. Men reported slightly higher rates of full-time work (35+ hours per week) than women, and full-time work was more likely among older respondents.

	Total Male Fema		Female	18–20 years old	21–25 years old	26–30 years old
	%	%	%	%	%	%
<20 hours	34	34	33	62	36	23
20–34 hours	20	17	26	14	21	21
35+ hours	46	50	42	24	43	56



Table 5: Social benefits

Roughly 60 percent of respondents reported receiving some kind of social benefit within the past year. Unemployed and lower-income households were less likely to have received government benefits. The Citizen's Account Program (35%) and Hafez (26%) were the most common, particularly among those who identified as unemployed. Receipt of benefits was slightly higher among older respondents.

	Total	18–20 years old	21–25 years old	26–30 years old	Unemployed
	%	%	%	%	%
Hafez Sanid Program (The Saudi Financial	23	17	22	26	15
Support Services Company)	15	11	15	18	5
Family Support Program	15	9	15	18	4
Citizen's Account Program Social benefits programs from the Ministry of Human Resources and	35	30	35	37	28
Social Development	18	11	17	21	7
Security pension	18	14	19	19	12
None of these	41	46	41	38	53

Table 6: Benefit receipt by household income

Lower-income households were more likely to report that they had not received any social benefits in the past 12 months. The table below shows that 52% of those in households with income below 5,000 SAR reported receiving no benefits, whereas only 35% of those in households with incomes greater than 20,000 SAR reported they do.

	Less than 5,000 SAR	5,001– 7,500 SAR	7,501– 10,000 SAR	10,001- 12,500 SAR	12,501- 15,000 SAR	15,001– 17,500 SAR	17,501– 20,000 SAR	Over 20,000 SAR
	%	%	%	%	%	%	%	%
None of these	52	48	40	38	36	36	29	35



Section 3: Job Search and Job Characteristics

There was some variation across the sample in willingness to commute for a job. Approximately half of the sample reported being willing to have a commute of at least 30 minutes each direction for work. On average, men were slightly more likely to be willing to commute longer distances than women. Among the unemployed, a status heavily skewed toward women, 18% would not take a job outside their residence, which may be a limiting factor.

Table 7: Maximum commute (among those in the labor force)

I will not accept a job outside my	
residence	15
Less than 30 minutes	27
30 minutes to one hour	28
One hour to two hours	11
More than two hours	14
I will not accept a job outside my	
immediate neighborhood	5

	Total	Male	Female	Southem Region	Easte m Region	Northem Region	Westem Region	Central Region	Unemployed
	%	%	%	%	%	%	%	%	%
30 minutes or less	47	44	49	52	50	39	46	44	46
30 minutes to one hour	28	27	30	18	28	23	28	33	26
More than one hour	25	30	21	29	22	38	26	23	28

Among those already in the labor force (i.e., employed or looking for work), most reported being willing to relocate for a job in the right circumstances. Women were slightly more likely to report being unwilling to relocate for a job than men, though the majority of women (85%) reported being open to relocation, suggesting that location may not be a binding constraint if appropriate opportunities were available elsewhere.



Table 8: Willingness to relocate (among those in labor force)

	Total	Male	Female	Unemployed
	%	%	%	%
Yes, I will relocate	46	54	38	39
Maybe, in some circumstances	43	38	48	45
No, I will not relocate	12	9	15	16

Respondents were asked which industries they would most like to work in and were permitted to choose multiple industries to reflect their full preferences (Table 9). The top five most popular included education (43%); information and communication technology (ICT) (38%); tourism, arts, entertainment, and recreation (37%); government, public administration, and defense (36%); and healthcare and social work (31%). Respondents expressed comparatively less interest in working in construction and utilities (10%); transportation and storage (11%); oil and gas (12%); and manufacturing (15%).

We find considerable gender gaps in industry preferences. For example, 49% of women reported education as a top choice, while only 30% of men identified the education sector as a preferred industry. Conversely, in the ICT sector, 49% of men identified the industry as a top choice, while only 32% of women did. However, women showed more interest in professional, scientific, and technical activities than men (33% vs. 23%). Men tended to be more interested in production-oriented industries such as oil and gas, construction, trade, and manufacturing. It's possible that certain industries are considered more appropriate for one gender over the other. Future research could examine industry-specific preferences and constraints by gender.

Additionally, respondents were asked whether they would prefer to work in the public or private sector (Table 10). Overall, 50% preferred the public sector, 30% preferred the private sector, and 20% had no preference. Women were slightly more likely to report preferences for the public sector than men. We also observed a preference for jobs in the public among those who were currently unemployed, but a larger share said they had no sector preference. Young Saudis already employed in either the public or private sectors tended to prefer staying in their current sector. However, this preference was weaker among those working in the private sector.

When asked why they preferred one over another, respondents preferring the public sector noted salary, stability, and a desire to help Saudi society as their top three reasons. Among the minority who preferred the private sector, top reasons included salary, flexibility, innovation and creativity, and personal passion. While both groups noted salary as the top reason for their preference, we observed differences in additional reasons that seem to suggest the public sector is viewed through a lens of service and stability, while the private sector is perceived as having greater flexibility and space for individual creativity and



interest. Future work could explore these perceptions and possible related interventions further.

Respondents were also asked what the most important qualities were in shaping their industry preferences (Table 11). The top four considerations respondents reported included a stable and reliable job, earning a high salary, having a job they were passionate about, and having a job where they could be creative and innovative. Factors related to other measures of success, respect, and marriage prospects were ranked as lower priorities. Men were more likely than women to say that they valued a job that would help them marry well. Among single men, marriage prospects were ranked sixth, on average, relative to the other ten options. Among women, marriage prospects were ranked last. However, more than 60% of respondents reported being unwilling to take a job their family did not approve of, suggesting that outside perceptions of appropriateness and respect likely play a role in shaping employment decisions. Across demographic groups, majorities said they would not take a job their family did not approve of.

Relatedly, respondents were asked to rank the respectability of jobs in the public versus private sector. Eighty-five percent described the public sector as highly or very highly respected, while only 62% described the private sector in this way. Future work could do more to explore perceptions of respectability and prestige across sectors and explore possible interventions to alter these perceptions or otherwise incentivize interest across sectors.



Table 9: Desired industry among the unemployed (multiple responses allowed)

	Total %	Male %	Female	Gender gap %
Oil and gas	12	20	7	13
Construction and utilities	10	16	6	10
Wholesale and retail trade	23	30	19	11
Manufacturing	15	21	12	9
Education	43	30	49	-19
Healthcare and social work	31	19	38	-19
Information technology and communications	38	49	32	17
Transportation and storage	11	17	7	10
Finance, insurance, and real estate	17	16	17	
Government, public administration, and				
defense	36	38	35	
Professional, scientific and technical activities	29	23	33	-10
Tourism, arts, entertainment, recreation	37	33	39	

Table 10: Sector preference

	Total	Male	Female	Unemployed	Among those currently employed in private sector	Among those currently employed in public sector
	%	%	%	%	%	%
Private sector	30	35	25	17	45	25
Publicsector	50	48	52	50	39	66
No					16	8
preference	20	17	23	33		



Table 11: Ranking of desired job qualities

Quality	Average Rank	Share of Top Rank	Share of Bottom Rank
Having a job that is stable and reliable	4.7	17	2
Earning a high salary	4.7	16	3
Having a job that I am passionate about	5.3	12	4
Having a job where I can be creative and innovative	5.3	11	4
Having a job that will give me the respect of people in my	6.0	6	4
community			
Being able to work flexible hours	6.0	6	4
Contributing to Saudi society	6.2	8	6
Having a job that is close to home	6.2	7	6
Helping other people	6.4	7	7
Being able to work from home	6.8	7	11
Having a job that will help me marry well (asked among	7.1	6	21
those who have never been married)			

Table 12: Respect for workers in different sectors

	Public sector	Private sector
	%	%
Very highly respected	53	30
Highly respected	32	32
Somewhat respected	14	30
Not too respected	2	7
Not respected at all	0	2
Total	100	100
Very highly, highly, or somewhat		
respected	<u>85</u>	<u>62</u>
Not too or not at all respected	<u>2</u>	<u>9</u>



Table 13: Job search networks and information

Young people often lack access to networks to help them find available jobs. Respondents were asked to select all the job search networks they use. The most common included online postings (69%), family (48%), and friends (47%). This might suggest that it would be worthwhile to explore interventions that educate young people about job-search resources and professional networking. For example, a recent study in South Africa found that training young work-seekers to use professional online job search tools increased employment by 10% (Wheeler et al., 2022).

	Total	Unemployed
Family	45	48
Friends	48	47
People I know in my local area	37	36
School or university	33	32
Online job searching websites	57	69



Section 4: Skills Training

We also explored participation and interest in skills training. Approximately 60% of the sample reported being currently enrolled in education or training. Of those currently enrolled, 75% were enrolled in school, university, or community college. The remaining 25% were enrolled in technical or vocational training. Not surprisingly, enrollment figures in schools and universities decreased with age, and our sample included a relatively high percentage of current students among those in the 18–20 age range (Table 13). Technical and vocational enrollment increased slightly among older respondents (Table 15). Enrollment in education or training was also more common among wealthier respondents (Table 14) and those employed in the public sector.

Table 14: Are you currently enrolled in education or training?

	Total	Male	Female	18–20 years old	21–25 years old	26–30 years old	Unemployed	Among those currently employed in the private sector	Among those currently employed in the public sector
	%	%	%	%	%	%	%	%	%
Yes	61	61	61	74	60	55	49	58	74
No	39	39	40	26	40	45	51	42	26

Table 15: Higher-income Saudis were more likely to be enrolled in education or training

Monthly HH income	Less than 5,000 SAR	5,001– 7,500 SAR	7,501– 10,000 SAR	10,001- 12,500 SAR	12,501– 15,000 SAR	15,001- 17,500 SAR	17,501– 20,000 SAR	Over 20,000 SAR
	%	%	%	%	%	%	%	%
Yes	49	54	53	66	72	65	73	70
No	51	47	47	34	28	35	27	31



Table 16: In which type of educational institution are you enrolled? (Among those who reported being enrolled in training)

	Total	Male	Female	18–20 years old	21–25 years old	26–30 years old
	%	%	%	%	%	%
School	14	17	12	25	14	8
University	48	46	51	55	48	44
Community college	13	16	10	12	15	11
Vocational training institution	12	8	15	2	11	19
Technical training institution	12	13	10	4	13	15

Among those who are not currently enrolled in education or training, 64% reported plans to enroll in one of the two within the next 12 months. Of those who plan to enroll in training, 72% reported that they would be somewhat or very likely to enroll in an education or training program for STEM skills. Intention to enroll in training was high across employees in both the public and private sectors, but public sector employees slightly outpaced private sector employees (69% of public employees not currently enrolled planned to in the next year, compared to 62% of private employees). Short vocational training certificate programs were the most common program type respondents planned to enroll in (Table 16). This question in the survey referred to generic training related to science, technology, engineering, or mathematic fields and may not accurately reflect specific plans for enrollment in training. However, it may indicate an interest in participating in STEM training. Exploring STEM training options, aspirations, and participation could be a fruitful area for future research.



Table 17: Type of training program prospective enrollees plan to participate in

	Total	18– 20 year old	21– 25 year old	26– 30 year old	Less than 5,000 SAR	5,001– 7,500 SAR	7,501– 10,000 SAR	10,001– 12,500 SAR	12,501– 15,000 SAR	15,001– 17,500 SAR	17,501– 20,000 SAR	Over 20,000 SAR
	%	%	%	%	%	%	%	%	%	%	%	%
Vocational training (short certification: less than six months) Vocational training (long certification:	27	27	24	30	35	28	21	29	26	26	25	22
more than six months)	15	12	17	14	15	16	15	14	15	11	15	15
Technical education program	9	11	10	7	11	8	10	9	8	7	6	10
Community college	6	6	7	6	8	7	7	4	5	8	6	5
University education (bachelor's) in science, technology, engineering, or math University education	14	25	14	10	11	17	17	11	11	22	19	10
(bachelor's) in all other fields	10	12	9	9	10	12	11	11	13	9	5	7
Graduate program (master's, PhD) in science, technology, engineering, or math	12	4	12	17	5	7	14	16	13	10	13	21
Graduate program (master's, PhD) in any other field	7	4	7	8	6	5	5	5	9	7	11	9



Section 5: Gender

The survey also included a module focused on gender, with questions related to gender norms, aspirations, and ideas about women working outside the home. Overall, these questions revealed gender gaps in many areas, including beliefs about employment considered appropriate for women, perceptions about women's safety in the labor market, as well as beliefs about qualifications and deservingness of employment.

Table 18: How many of the women you know have ever worked outside the home?

Respondents were asked to estimate the proportion of women they know who work outside the home. Women were more likely to report that they know women who have worked outside the home and were substantially more likely to suggest that most or all the women they know work outside the home. This is an important discrepancy, because it's possible that misconceptions about the status quo could shape opinions about the labor market. It would be interesting for future research to explore the extent to which this is due to different ideas about what it means to work outside the home, or whether this discrepancy is based on false information or understanding by one gender. Answers to these questions could inform policy interventions to help correct this misconception.

	Total	Male	Female	Less than 5,000 SAR	5,001– 7,500 SAR	7,501- 10,000 SAR	10,001- 12,500 SAR	12,501- 15,000 SAR	15,001- 17,500 SAR	17,501- 20,000 SAR	Over 20,000 SAR
	%	%	%	%	%	%	%	%	%	%	%
All or almost all of them	16	13	20	14	11	18	16	17	18	17	21
Many of them	32	23	42	27	31	30	38	37	30	36	33
Some of them	21	23	19	18	26	21	17	24	25	23	19
Few of them	20	26	14	23	22	23	20	12	20	17	21
None of them	10	15	5	18	10	9	10	9	7	7	6

Tables in this section outline norms and attitudes related to women's participation in the labor market. Results indicated that there are substantial gaps in attitudes between men and women, with men more likely to report restrictive views of women in the labor market.

Women were more likely to report positive beliefs related to women in leadership roles (Table 19a). For example, women in the sample were 24 percentage points more likely to report that it is appropriate for women to work in senior executive roles than men. These gender gaps narrowed considerably when respondents were asked about lower-level positions, including clerical work: We observed a narrower gap of 8 percentage points in beliefs about the appropriateness of women working in these roles. This may be in part related to beliefs about women's capabilities. Only 70% of men agreed with the statement "With the same training and education, a woman will be just as good as a man at almost any job," whereas 90% of women agreed. Relatedly, there was a gap of 20 percentage points in



beliefs about whether it is unsafe for women to work outside the home (Table 19d), and a gap of 25 percentage points in beliefs that men should have more rights to available jobs than women when employment opportunities are scarce (Table 19e). Men were slightly more likely than women to agree that working outside the home would hurt women's marriage prospects (Table 19f), though more than 40 percent of women agreed that working outside the home could be harmful to their ability to find a husband in the future.

Together, these findings indicate that, while many men do support women working outside the home, many do not. These beliefs often diverged along gender lines. There is considerable space for interventions targeting norms and beliefs about women in the market.

Table 19a: Employment positions appropriate for women

		Male	Female	Gap
	%	%	%	
Senior executive/official	44	32	56	24
Manager	54	45	64	19
Professional	45	36	55	19
Skilled worker	40	35	45	10
Clerical	50	48	53	5
Manual labor	24	17	31	14

Table 19b: Agreement with gender statements

Gender statements	Agree	Disagree
It is not safe for women to work outside the home in a small or medium-size private company	<u>51</u>	<u>49</u>
When jobs are scarce, men should have more of a right to a job than women	<u>60</u>	<u>40</u>
A woman who wants to have a professional career will have difficulty finding a husband	<u>48</u>	<u>52</u>
Men and women should be able to compete for the same jobs	<u>75</u>	<u>25</u>
With the same training and education, a woman will be just as good as a man at almost any job	<u>80</u>	<u>20</u>



Table 19c: It is not safe for women to work outside the home in a small or medium-size private company

	Total	Male	Female	Southern Region	Eastern Region	Northern Region	Westem Region	Central Region
	%	%	%	%	%	%	%	%
<u>Totally agree</u>	<u>51</u>	<u>61</u>	<u>40</u>	<u>55</u>	<u>52</u>	<u>42</u>	<u>50</u>	<u>51</u>
<u>Totally disagree</u>	<u>49</u>	<u>39</u>	<u>60</u>	<u>45</u>	<u>48</u>	<u>58</u>	<u>50</u>	<u>49</u>

Table 19d: When jobs are scarce, men should have more of a right to a job than women

	Total	Male	Female	Southern Region	Eastern Region	Northern Region	Western Region	Central Region
	%	%	%	%	%	%	%	%
<u>Totally agree</u> <u>Totally disagree</u>	<u>60</u> <u>40</u>	<u>72</u> 28	<u>47</u> <u>53</u>	<u>64</u> <u>37</u>	<u>60</u> <u>40</u>	<u>58</u> <u>42</u>	<u>59</u> <u>41</u>	<u>59</u> 41

Table 19e: A woman who wants to have a professional career will have difficulty finding a husband

	Total	Male	Female	Southern Region	Eastern Region	Northem Region	Western Region	Central Region
	%	%	%	%	%	%	%	%
Totally agree	<u>48</u>	<u>54</u>	<u>42</u>	<u>45</u>	<u>51</u>	<u>43</u>	<u>49</u>	<u>47</u>
Totally disagree	<u>52</u>	<u>47</u>	<u>58</u>	<u>55</u>	<u>49</u>	<u>57</u>	<u>51</u>	<u>53</u>

Table 19f: Men and women should be able to compete for the same jobs

		Male	Female	Southern Region	Eastern Region	Northern Region	Western Region	Central Region
	%	%	%	%	%	%	%	%
<u>Totally agree</u> <u>Totally disagree</u>	<u>75</u> 25	<u>69</u> <u>31</u>	<u>82</u> <u>18</u>	<u>78</u> <u>22</u>	<u>75</u> <u>25</u>	<u>70</u> <u>30</u>	<u>75</u> <u>25</u>	<u>76</u> <u>24</u>



Table 19g: With the same training and education, a woman will be just as good as a man at almost any job

		Male	Female	Southern Region	Eastern Region	Northem Region	Westem Region	Central Region
	%	%	%	%	%	%	%	%
Totally agree	<u>80</u>	<u>71</u>	<u>90</u>	<u>81</u>	<u>77</u>	<u>81</u>	<u>82</u>	<u>80</u>
Totally disagree	<u>20</u>	<u>29</u>	<u>10</u>	<u>19</u>	<u>23</u>	<u>19</u>	<u>18</u>	<u>20</u>