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مسك القيم

Saudi Youth Values 2020





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Executive Summary

The Saudi Youth Values project started in 2016 with a clear vision: understanding the deep sources of motivation of young men and women in Saudi Arabia in order to capture the current and future social dynamics in the country. Understanding what youth value over time and across different strata of society is an important contribution to the remarkable ongoing social transformation taking place in the Kingdom.

The fourth edition of this study is a key milestone in the development of greater comprehension of youth values in the Kingdom of Saudi Arabia. While professional development and financial stability remain a priority for youth, this year, it seems that young men and women are attributing more importance to family and family well-being. Youth demonstrate cohesion and a high level of

satisfaction with the speed of social transformation initiated in the country under the Vision 2030, with minimal differences across genders or regions. Saudi youth seem to be equally driven by a keen sense of progress and an important need for stability.

To further investigate this, a survey was conducted at the national level, covering urban and rural areas of five regions¹ of the Kingdom of Saudi Arabia. A representative sample of 1001 Saudis between the age of 18 and 35 and over 35 was interviewed during the last week of October and the first week of November 2020. Given the exceptional circumstances of the COVID-19 pandemic, the survey was conducted online with all the necessary scientific rigor regarding sampling (See appendix 1 for details).



Key takeaways:



Saudi youth show cohesion → They are aligned on most values, many of which are centered on family, faith, and strengthening personal and social ties.



Saudi youth value progress → They see themselves as work-centered and ambitious and expect the country to become more developed, innovative, and socially cohesive.



Saudi Youth also value stability → Most of the values they currently attribute to their country overlap with the values they wish the nation had. **%40** of young people think “safe” is the best word to describe their country.



Saudi Youth welcome the nation’s rapid change → Only **%16** think the country is changing slowly. **%78** believe the pace of change is appropriate.

Saudi Youth at a Glance



20.7m

Population total (2020)



12.2%

Share of youth 18-24



17.5%

Share of youth 25-34



27.9%

Youth unemployment (2019)

YOUTHS VALUE...



✓ Accountability

✓ Ambition

✓ Caring

✓ Achievement

✓ Adaptability



✓ Accountability

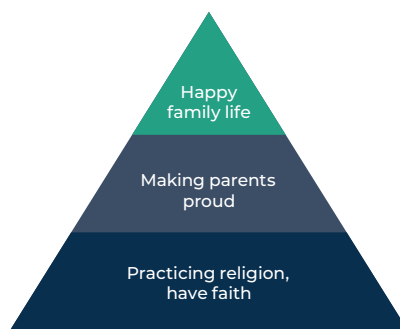
✓ Ambition

✓ Achievement

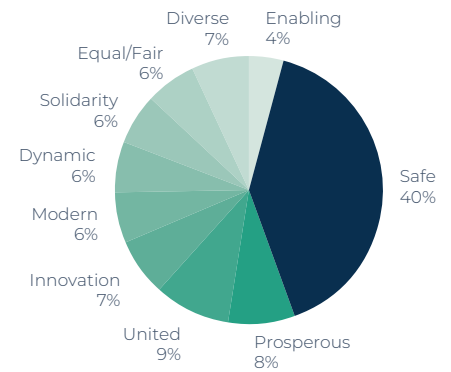
✓ Adaptability

✓ Work/life balance

YOUNG PEOPLE ARE GUIDED BY...



YOUNG PEOPLE THINK THEIR NATION IS...



YOUTHS THINK THE NATION CARE MORE ABOUT...



YOUTH WISH FOR THEIR COUNTRY AND THE WORLD...



YOUTH ARE MOST STRESSED BY...



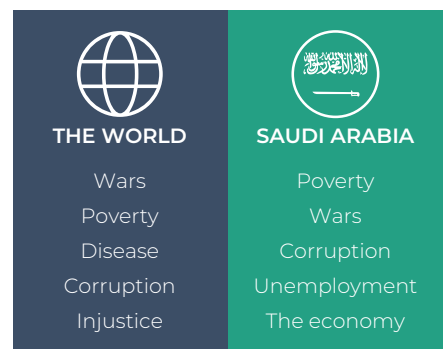
MANY YOUNG PEOPLE WANT FASTER SOCIAL TRANSFORMATION:

44%
of youth think social transformation is fast

and of these

71%
are comfortable with the pace.

YOUTH FEAR FOR THEIR COUNTRY AND THE WORLD...





INTRODUCTION



Young citizens hold the keys to their nation's future. In the Kingdom of Saudi Arabia, people under the age of 35 represent 67% of the entire population².

This is the reason why we at the Misk Foundation have spent the last four years studying and understanding youth values and the way those values shape youth opinions and behaviors.

The three previous reports have considerably developed the Foundation's knowledge of youth-held values. This report builds on this previous work but is different in many ways. Indeed, 2020 has been different for each one of us, not only because of the COVID-19 pandemic, but also because we can look back at three years of social and economic change in Saudi Arabia embodied in the Vision 2030. The year 2020 has also been a time of reflection that will shape young people in an exceptional manner and will probably contribute toward the fast and robust social transformation already taking place in the Kingdom.

This year, it was essential to deepen the knowledge acquired since 2016 on Saudi youth values by expanding the reflection areas beyond the 3 pillars of the Barrett Values Assessment, which was used in past years.

The three elements of this model (personal values, national cultural values, and desired national values) are key to understand the deep sources of motivations supported by our own belief system as individuals and citizens. Building on this, this 2020 edition also aims to provide insight into behaviours and opinions and to create actionable data in order to better target and align national action and initiatives to support young people.

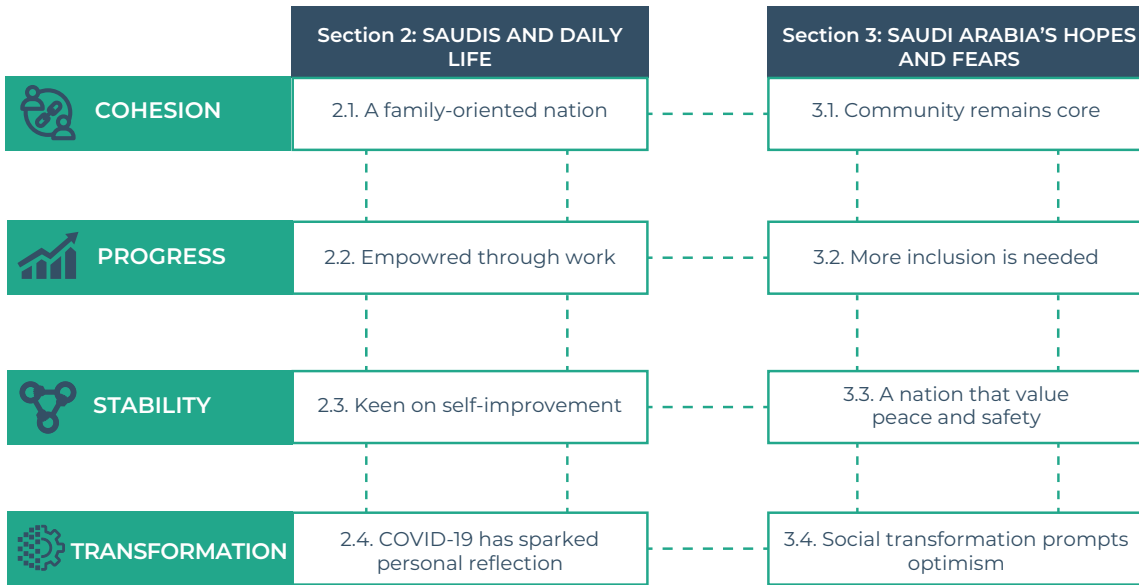
This report sheds light on young people's values by reporting on opinion and attitudinal survey data. Three of the most commonly reported-upon questions rely on the Barrett values approach (see Appendix for details). For each of these questions, respondents are asked to choose 10 values out of a list of over 100 terms. We report on them as follows:

- **Personal values:** Respondents are asked to select values that resonate with them the most personally.
- **Current culture values:** Respondents are asked to select values that best describe the nation's culture.
- **Desired culture values:** Respondents are asked to select values that best describe what they wish was the nation's culture.
- **Most and least desired values (or "value jumps"):** For each value, we compare desired counts with current culture counts. Values where desired exceeds current are the most desired. Values where current exceed desired are lower priority.



1. SUMMARY FINDINGS

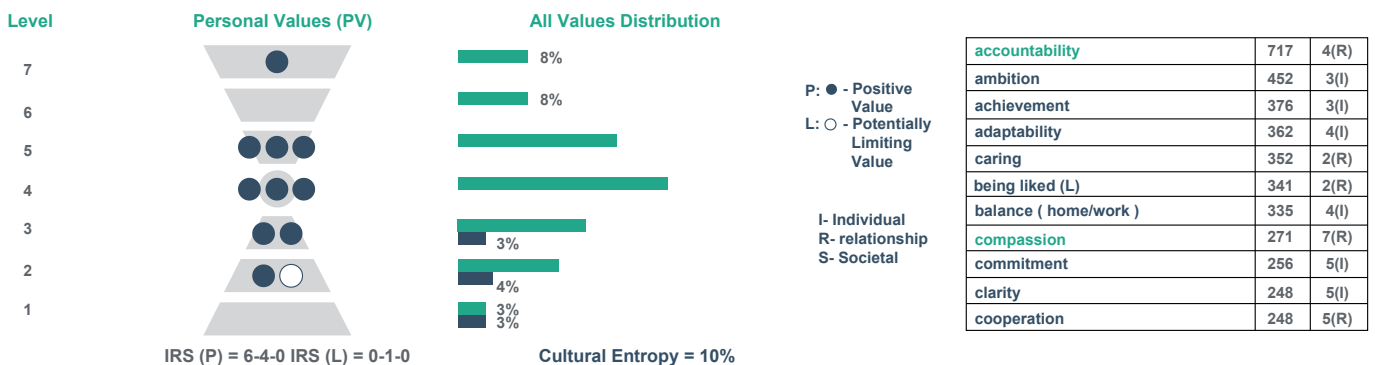
This report is structured around **four key themes** that emerged clearly through this data – **cohesion, progress, stability, and transformation** – and explores how they are reflected in young people’s daily lives, as well as in their hopes and dreams for the nation:



Cohesion

Vision 2030 emphasizes the need to create a strong, cohesive nation. Many of the top personal values in 2020 were those most centered on relationships, such as “accountability” and “caring,” though individualistic values such as “ambition” scored highly, too. A number of these values focused on self-development, in line with the central tenet of Vision 2030 that competition is key to a stronger Saudi Arabia.

TOP PERSONAL VALUES 2020



Top-ranked personal values out of a list of 106 values
 Respondents: 35 18 years old
 Fieldwork dates: October 29th –November 8th, 2020

Cohesion is also expressed by the fact that there appear to be few divisions between young people: top-ranked personal values are similarly independent of gender or the region where people live.

TOP-RANKED PERSONAL VALUES 2020

By gender		By region				
Men	Women	West	North	East	South	Central
Accountability	Accountability	Accountability	Accountability	Accountability	Accountability	Accountability
Ambition	Ambition	Ambition	Ambition	Achievement	Ambition	Ambition
Achievement	Caring	Balance (Home/Work)	Caring	Ambition	Achievement	Adaptability
Adaptability	Achievement	Adaptability	Being Liked	Being Liked	Courage	Achievement
Balance (Home/Work)	Adaptability	Caring	Adaptability	Caring	Caring	Caring
Being Liked	Being Liked	Achievement	Commitment	Adaptability	Balance (Home/Work)	Being Liked
Caring	Balance (Home/Work)	Being Liked	Commitment	Clarity	Commitment	Balance (Home/Work)
Compassion	Compassion	Compassion	Achievement	Compassion	Cooperation	Cooperation
Commitment	Clarity	Commitment	Balance (Home/Work)	Commitment	Belonging	Compassion
Cooperation	Commitment	Clarity	Clarity	Balance (Home/Work)	Being Liked	Clarity

Top-ranked personal values out of a list of 106 values – Broken down by gender and by region
 Respondents: 18-35 years old
 Fieldwork dates: October 29th – November 8th, 2020

Cohesion is expressed largely through Saudi Arabia’s commitment to the institutions of family and community. This is explored further in sections 2.1 and 3.1.



Young people consistently expressed support for the social and economic transformation promoted by Vision 2030. Indeed, some of the most desired cultural values centered around inclusion: “poverty reduction,” “employment opportunities,” “meritocracy,” and “social responsibility.” The least desired ones include “parasitism,” “scandal,” and “violation of the system.”



10 MOST AND 10 LEAST DESIRED VALUES 2020

VALUE	PERCEIVED CULTURE VOTES	DESIRED CULTURE VOTES	JUMP
Poverty reduction	11	52	372%
Respect for time	8	29	262%
Positivity	9	31	244%
Nature conservancy	14	45	221%
Employment opportunities	38	115	202%
Meritocracy	4	12	200%
Sport	10	27	170%
Openness to the world	10	25	150%
Social responsibility	8	20	150%
Values awareness	11	27	145%
Tribal affiliation	10	3	-70%
Corruption	56	16	-71%
Materialistic	15	4	-73%
Bullying	73	16	-78%
Tribal fundamentalism	10	2	-80%
Lack of clear vision	12	2	-83%
Poverty	15	2	-86%
Violating the system	8	1	-87%
Parasitism	11	1	-90%
Scandal	14	1	-92%

Top 10 and bottom 10 value jump between perceived culture values and desired culture values

Respondents: 18-35 years old

Fieldwork dates: October 29th – November 8th, 2020

Value Jump = difference between desired and current values. Positive: people desire more of the value than they observe; negative: people observe more of the value than they desire.



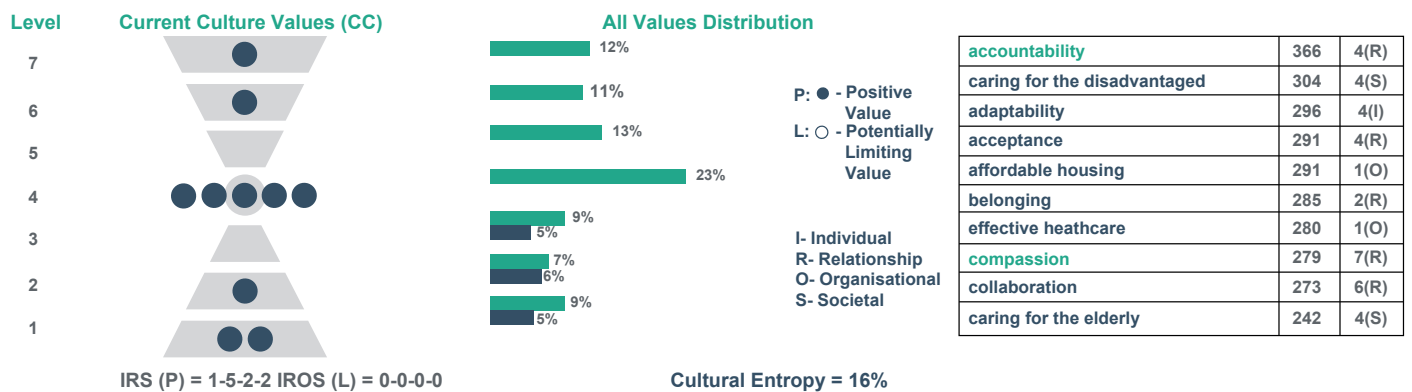
Economic development is necessary for this progress to occur. Section 2.2 explores how **work** is becoming a priority for young people and how private sector attitudes are diverging from public sector ones. Of course, progress also means potentially greater social divides. Section 3.2 explores the growing demand for **inclusion**.

Stability

Young people also understand that community, inclusion, alignment around Islamic principles, safety, and security are indispensable to the nation’s prosperity. These stability-related values were among those most consistently selected by respondents.

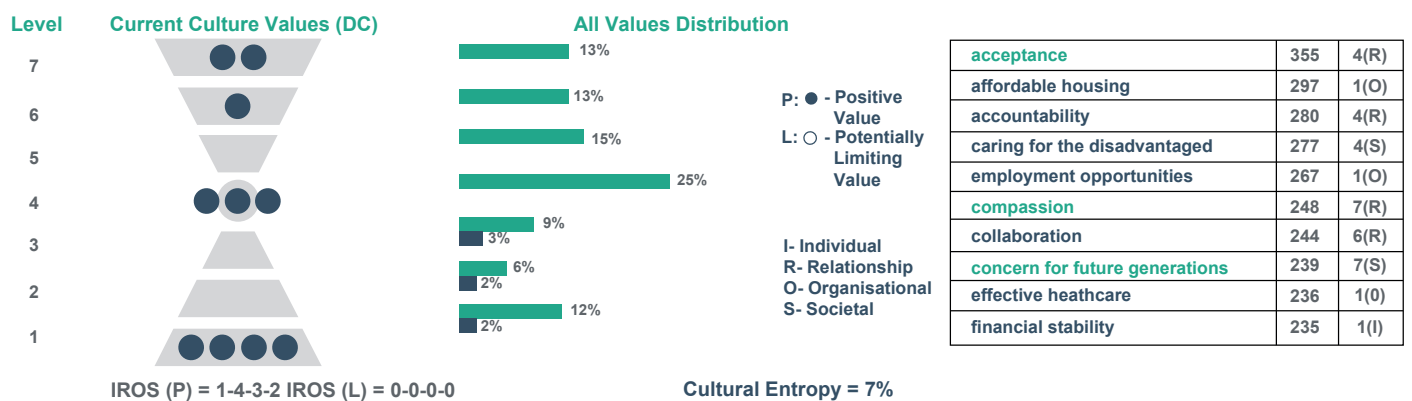
Among the top perceived current values are more socially-minded beliefs such as “**caring for the elderly**” and “**caring for the disadvantaged.**” These beliefs also appear among the most frequently desired culture values, suggesting that people believe the country is progressing in the right direction.

TOP PERCEIVED CULTURE VALUES 2020



Top-ranked perceived culture values out of a list of 115 values
 Respondents: 18 35 years old
 Fieldwork dates: October 29th –November 8th, 2020

TOP SAUDI DESIRED CULTURE VALUES 2020



Top-ranked desired culture values out of a list of 115 values
 Respondents: 18 35 years old
 Fieldwork dates: October 29th –November 8th, 2020

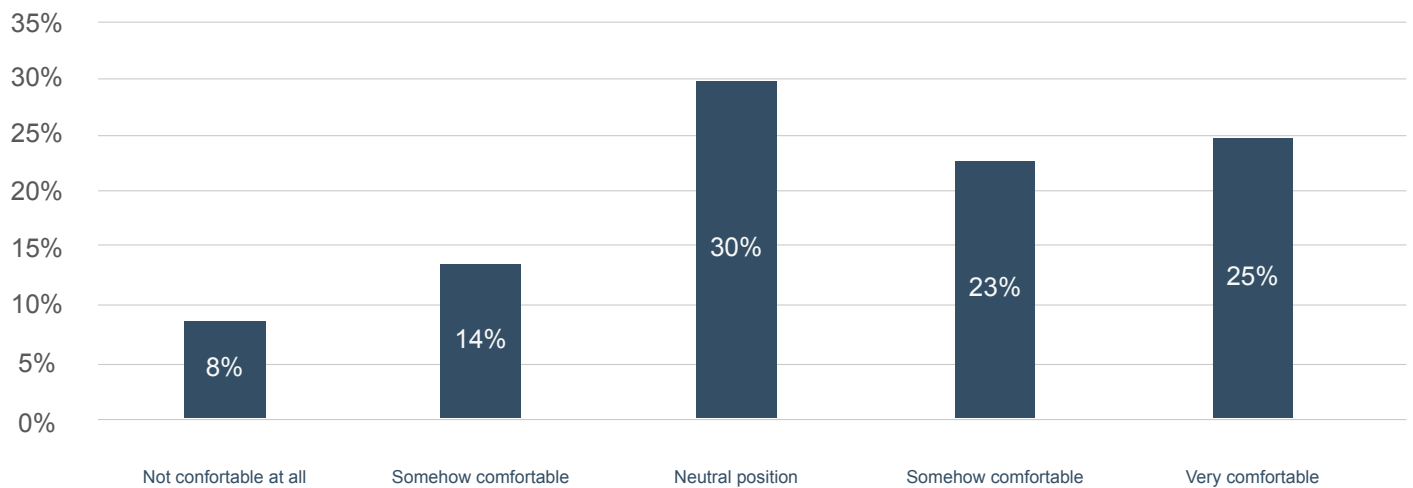
Stability at the national level creates an environment for **self-development**, a theme explored in section 2.3. Furthermore, youth describe Saudi Arabia as “**safe**” and “**stable.**” We explore this further in section 3.3.

Transformation

The current pace of economic and social change in the country is without precedent, reflecting the ambitious reform agenda of the government. According to our data, 78% of young people surveyed are satisfied with the country's pace of change, which is a strong signal that Vision 2030's aggressive timeline is aligned with the desires of the nation.



HOW COMFORTABLE ARE YOU WITH THE SPEED OF SOCIAL TRANSFORMATION IN YOUR COUNTRY?



Q: How comfortable are you with the speed of social transformation in your country?
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

Values have stayed mostly stable between 2018 and 2020, with a temporary shift in 2019 towards **“positivity”** and **“friendship.”** These and other top-ranked personal values over this time period, such as **“adaptability”** and **“ambition,”** are consistent with the national social transformation strategy tenet that “moderation, tolerance, excellence, discipline, equity, and transparency will be the bedrock of our success.”³ This suggests that the natural evolution of Saudi Arabia’s national character is occurring coherently with its ambitious reform program.



TOP SAUDI PERSONAL VALUES OVER TIME

TOP-RANKED PERSONAL VALUES IN 2020		TOP-RANKED PERSONAL VALUES IN 2019		TOP-RANKED PERSONAL VALUES IN 2019	
Accountability	66%	Positivity	30%	Accountability	61%
Ambition	51%	Friendship	28%	Ambition	56%
Achievement	40%	Patience	26%	Caring	48%
Being liked	36%	Ethics	25%	Excellence	45%
Caring	34%	Generosity	23%	Achievement	44%
Adaptability	34%	Self-Confidence	22%	Being liked	43%
Balance home/work	31%	Respect	20%	Clarity	43%
Compassion	28%	Integrity	18%	Compassion	42%
Being the best	26%	Proficiency	18%	Commitment	36%
Caution	25%	Safety	17%	Chivalry	35%

Top-ranked personal values chosen out of a list of 106 values; percentages indicate the share of survey sample selecting them
Comparison between 2020, 2019, and 2018

Respondents: 18-35 years old

Fieldwork dates: October 29th –November 8th, 2020; October 2019; March 2018

Top personal values do not vary much for the generation 35+, which holds many of the same beliefs as younger people. This is another indication that the pace of social change is appropriate and that it is not disrupting the relationship between younger and older generations.

TOP PERSONAL VALUES

Over 35s	Under 35s
Accountability	Accountability
Ambition	Ambition
Adaptability	Achievement
Caring	Adaptability
Balance (Home/Work)	Being liked
Achievement	Balance (Home/Work)
Being liked	Caring
Commitment	Clarity
Cooperation	Being the best
Compassion	Compassion


Top-ranked personal values out of a list of 106 values
All respondents – Broken down by age – 18-35 and over-35


Fieldwork dates: October 29th –November 8th, 2020







2. YOUTHS AND DAILY LIFE

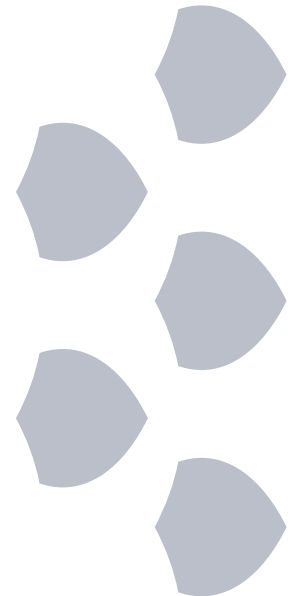
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Saudi youth value **family** → Having a happy family life and making parents proud remain the guiding ambitions for most young people.
- 

Saudi youth focus on **work** → Personal ambition is the second most important personal value for young women and men, particularly women. However, 43% of Saudi youth report work as their primary source of stress.
- 

Stability allows young people to **self-improvement** → “Achievement,” “Being liked,” and “Being the best” rank among their top-10 personal values in 2020. Young men in particular report a desire to travel.
- 

Saudi Youth are intimately affected by **COVID-19** → Health-related concerns, including COVID-19, are among the top-5 sources of stress. In our study, 61% and 59% of young people report spending more time with family and thinking about life perhaps as a result of the pandemic.



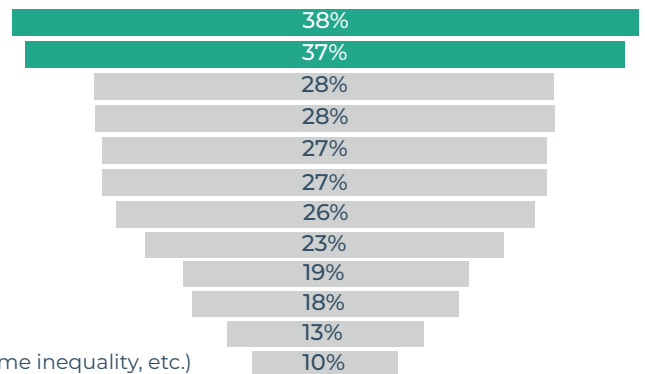
2.1. A FAMILY-ORIENTED NATION

Young women and men place a great emphasis on positive family relationships. Many respondents stated that making their parents proud was a guiding ambition in their lives, while concerns related to family (particularly home ownership) rank highly among sources of stress. This suggests that Vision 2030’s goal of increasing home ownership by 5% points by 2020 is aligned with the needs of the nation⁴.

Notably, 37% of young respondents identified “making their parents proud” as one of the top three ambitions guiding their actions, only preceded by “have a happy family life.” These family-oriented ambitions outnumbered those related to lifestyle and career.

AMBITIONS THAT GUIDE YOUTH ACTIONS

- Have a happy family life
- Make your parents proud
- Having faith, practicing one's religion
- Lead an active and healthy life (play sports, feel good in your body)
- Be rich - have the means to buy whatever you want
- Having your own business
- Travel the world
- Help others (through charitable work, for example)
- Discovering different cultures (arts, languages, etc.)
- Thrive in your job
- Being surrounded by friends
- Defending a cause (environmental protection, better education, less income inequality, etc.)

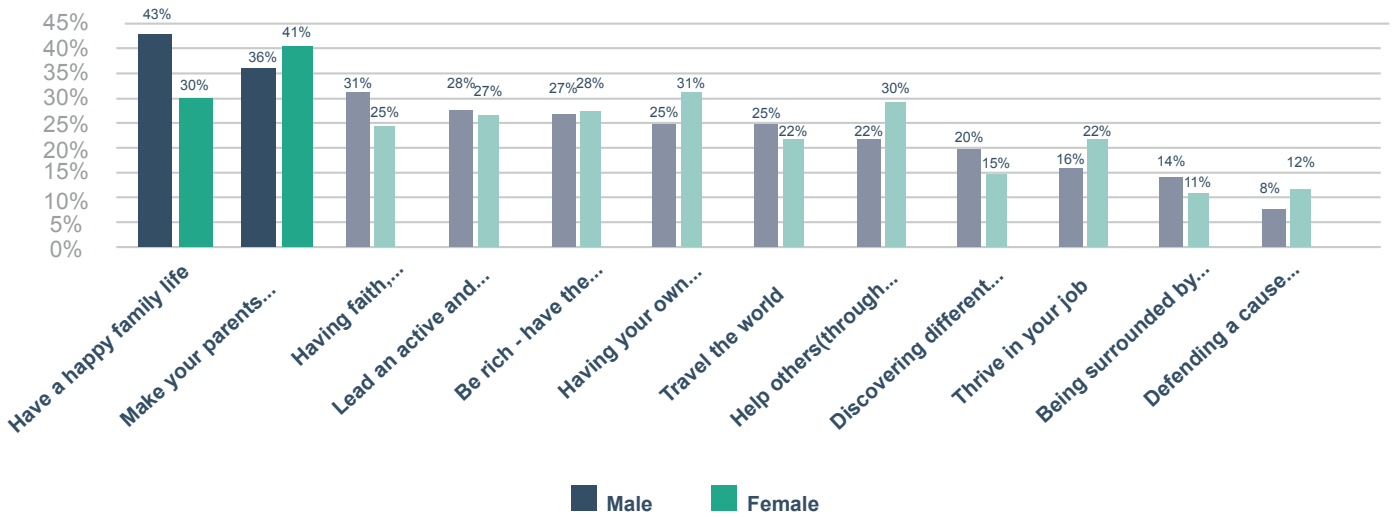


Q: Please select up to three of the following ambitions that guide most of your actions?
 Sum of respondents choosing each of the ambition as first, second or third choice.
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

Young men were 13 percentage points more likely to prioritize having a happy family life than women, one of the few, strong statistically significant gender differences in this year’s survey data. This is correlated with a greater emphasis on religion: Men are 6 percentage points more likely to prioritize

faith. Women, conversely, place greater emphasis on making their parents proud (+5 percentage points) and helping others more generally, suggesting their conception of family is broader than men’s focus on the nuclear family.

AMBITIONS THAT GUIDE YOUTH ACTIONS



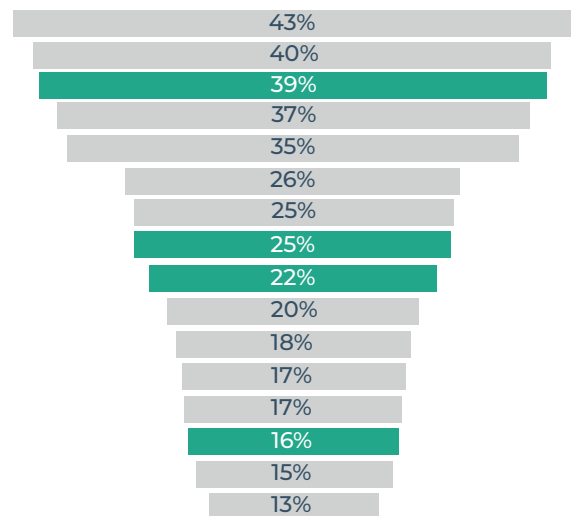
Q: Please select up to three of the following ambitions that guide most of your actions?
Sum of respondents choosing each of the ambition as first, second or third choice
Respondents: 18-35 years old
Fieldwork dates: October 29th –November 8th, 2020

The desire of young people to please their parents, or a pressure to conform to parental expectations, can also be observed in the survey responses. When asked about their behaviors, for example, 34% of

young respondents reported lying to their parents, of which 13% reported doing so more than once a month.

AMBITIONS THAT GUIDE YOUTH ACTIONS

- My career prospects
- My long-term financial future
- The physical/medical health of my family
- My physical/medical health
- Covid-19
- My day-to-day finances
- My personal safety
- The welfare of my family
- Loneliness
- School/education
- Access to housing
- The current social status
- The current political climate
- Being able to start a family of my own
- Climate change
- Social transformation



Q: From the list of items below, rank the top 5 sources of stress for you personally.
Weighted sum of respondents, ranking each ambition as the first (weighted 1), second (weighted 0.9), third (weighted 0.81), fourth (weighted 0.729) or fifth (weighted 0.656) choice.
Respondents: 18-35 years old
Fieldwork dates: October 29th –November 8th, 2020

Concerns related to family were frequently cited as common sources of stress by young people. Family physical health was identified as the third-ranking source of stress, with young people more concerned about this than about their own physical health. Family welfare also ranked highly with respondents being as concerned about this as about their own personal safety. Given the focus and importance of family groups, loneliness also ranks surprisingly

highly, possibly due to COVID-19-related isolation.

Relatively few young people were stressed about being able to start their own family, consistent with the high fertility rate in the Kingdom (currently standing at 2.3 births per woman) and Vision 2030's commitment to provide families with the support needed to care for their children⁵.

TOP FAMILY-RELATED VALUES, BY YEAR

TOP-RANKED FAMILY-RELATED PERSONAL VALUES IN 2020		TOP-RANKED FAMILY-RELATED PERSONAL VALUES IN 2019		TOP-RANKED FAMILY-RELATED PERSONAL VALUES IN 2018	
Caring	66%	Respect	30%	Caring	61%
Balance (home/work)	51%	Safety	28%	Compassion	56%
Compassion	40%	Gratitude	26%	Commitment	48%
Commitment	36%	Trust	25%	Balance (home/work)	45%
Belonging	34%	Honesty	23%	Respect	44%
Honesty	34%	Giving advice	22%	Concern for future generations	43%
Gratitude	31%	Compassion	20%	Keeping promises	43%
Concern for future generations	28%	Keeping promises	18%	Listening	42%
Marriage/Family	26%	Belonging	18%	Trust	36%
Respect	25%	Commitment	17%	Safety	35%

10 top-ranked family-related personal values, chosen out of a list of 106 values, and their respective rank in the whole list of values
Respondents 18-35 years old
Fieldwork dates: October 29th – November 8th, 2020; October 2019; March 2018

The personal values identified by young people reinforce the perceived importance of personal relationships – with a focus on **“caring,” “compassion,” and “commitment,”** and **“having a good home/work balance”** in the top 10.

At the same time, young people call for a stronger culture of dialogue in society. **“Trust”** and **“dialogue”** were important values that young Saudis wish to strengthen in their country's culture. **“Commitment”** and **“tradition”** were among the values they would like to see less of.

MOST AND LEAST DESIRED FAMILY-RELATED VALUES 2020

FAMILY-RELATED VALUE JUMPS		
Trust	#13	+138%
Personal fulfilment	#38	+50%
Dialogue	#49	+21%
Commitment	#68	-10%
Tradition	#72	-13%
Caring for the elderly	#73	-13%



3 most and 3 less family-related desired values, chosen out of a list of 115 values, and their respective rank in the whole list of desired values; percentages indicate the difference between the number of survey respondents desiring the value for Saudi Arabia and the number of survey respondents perceiving the value as currently existing in Saudi Arabia.

Respondents: 18-35 years old

Fieldwork dates: October 29th – November 8th, 2020

Value Jump = difference between desired and current values. Positive: people desire more of the value than they observe; negative: people observe more of the value than they desire.

2.2. EMPOWERED THROUGH WORK

Young people see themselves as ambitious and high achieving. The personal values identified by young people in 2020 include several related to work, career, and professional identity – with the top 10 including **“ambition,” “achievement,”** and **“being**

the best.” There is strong alignment between these values and the overall social transformation efforts to maximize the potential of the workforce through encouraging a culture of high performance.

TOP WORK-RELATED VALUES RANKING AMONG ALL VALUES, BY YEAR

TOP-RANKED WORK-RELATED PERSONAL VALUES IN 2020		TOP-RANKED WORK-RELATED PERSONAL VALUES IN 2019		TOP-RANKED WORK-RELATED PERSONAL VALUES IN 2018	
Ambition	#2	Discipline	#24	Ambition	#2
Achievement	#3	Experience	#26	Excellence	#4
Being the best	#9	Ambition	#30	Achievement	#5
Commitment	#11	Determination and perseverance	#33	Commitment	#9
Coaching/mentoring	#19	Reputation	#53	Coaching/mentoring	#21
Discipline	#22	Financial stability	#59	Competitive	#28
Competitive	#25	Job security	#63	Job security	#42
Determination	#30	Being the best	#65	Experience	#60
Excellence	#47	Commitment	#66	Financial stability	#62
Experience	#54	Coaching/mentoring	#71	Safety	#44

10 top-ranked work-related personal values, chosen out of a list of 106 values, and their respective rank across all values; color coding indicates repetition across the years.

Respondents: 18-35 years old

Fieldwork dates: October 29th –November 8th, 2020; October 2019; March 2018

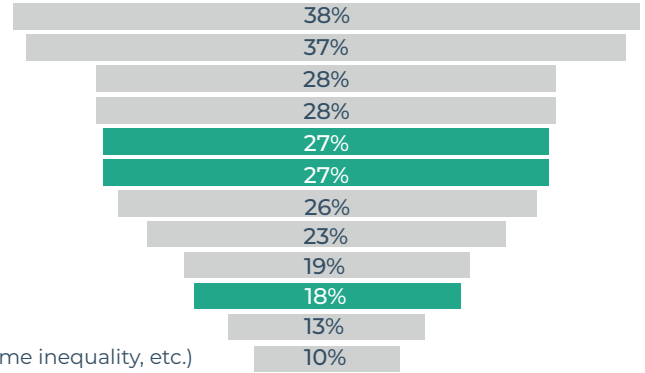
Yet, when asked about ambition, career matters less than family and faith for respondents. Less than 1 in 5 identified **“thriving in their job”** as being one of their guiding ambitions. However, 27% of respondents identified either **“being rich”** or **“having their own business”** as one of their top three ambitions guiding their actions.

More young women than men selected career-related responses. This suggests that young women are highly motivated, with 22% of young women citing their ambition to thrive at work, compared to 16% of young men. The high priority attributed to having your own business is also noteworthy and encouraging given the Kingdom’s Vision 2030 efforts to promote SMEs and to increase their contribution to GDP from 20% to 35% by 2030⁶.



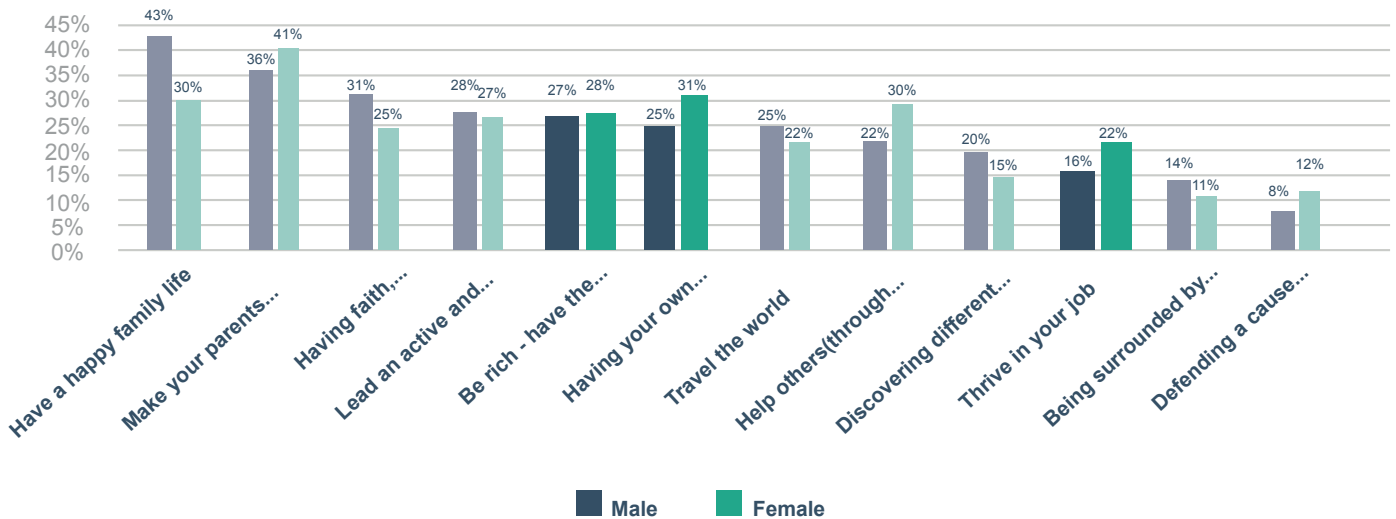
AMBITIONS THAT GUIDE YOUTH ACTIONS 2020

- Have a happy family life
- Make your parents proud
- Having faith, practicing one's religion
- Lead an active and healthy life (play sports, feel good in your body)
- Be rich - have the means to buy whatever you want
- Having your own business
- Travel the world
- Help others (through charitable work, for example)
- Discovering different cultures (arts, languages, etc.)
- Thrive in your job
- Being surrounded by friends
- Defending a cause (environmental protection, better education, less income inequality, etc.)



Q: Please select up to three of the following ambitions that guide most of your actions?
 Sum of respondents choosing each of the ambition as first, second, or third choice.
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

PLEASE SELECT UP TO THREE OF THE FOLLOWING AMBITIONS THAT GUIDE MOST OF YOUR ACTIONS.



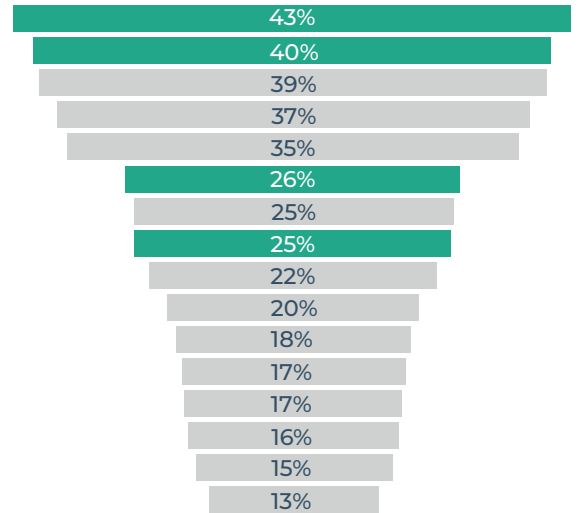
Q: Please select up to three of the following ambitions that guide most of your actions?
 Sum of respondents choosing each of the ambition as first, second, or third choice
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

Generally, most young people report that they take a professional approach to their work and study. However, 31% stated that they sometimes **lied to their teacher or boss**, with 14% doing so more than once per month.

While the guiding ambitions reported by young people are more likely to be related to family or faith than to career, the highest ranked sources of stress for this group are related to long-term career prospects and financial security. This may suggest that people are concerned about future employment opportunities or that they are not earning enough to ensure long-term financial stability for their families.

MAIN SOURCES OF STRESS FOR YOUTH

- My career prospects
- My long-term financial future
- The physical/medical health of my family
- My physical/medical health
- Covid-19
- My day-to-day finances
- My personal safety
- The welfare of my family
- Loneliness
- School/education
- Access to housing
- The current social status
- The current political climate
- Being able to start a family of my own
- Climate change
- Social transformation



Q: From the list of items below, rank the top 5 sources of stress for you personally. Weighted sum of respondents ranking each ambition as first (weighted 1), second (weighted 0.9), third (weighted 0.81), fourth (weighted 0.729), or fifth (weighted 0.656) choice. Respondents: 18-35 years old. Fieldwork dates: October 29th –November 8th, 2020

Young people seem to want a more modern workplace. **“Employment opportunities”** and **“meritocracy”** were among top-ranked work-related values that young women and men want the most for their country’s culture. **“Bureaucracy”** and **“unemployment”** ranked among the least. Indeed, youth unemployment remains a key issue for the

country. **“Employment opportunities”** ranked 5th among top desired cultural values, but only 36th among perceived cultural values. Saudi youth unemployment currently stands at 27.8%, compared to a worldwide average of 15.9%⁷. This highlights the ongoing importance of the Kingdom’s goal to lower the unemployment rate to 7% by 2030.

MOST AND LEAST DESIRED WORK-RELATED VALUES

WORK-RELATED VALUE JUMPS		
Employment opportunities	#5	+203%
Meritocracy	#6	+200%
Material needs	#16	+117%
Accountability	#80	-19%
Bureaucracy	#92	-46%
Unemployment	#99	-63%



3 most and 3 least desired work-related values, chosen out of a list of 115 values, and their respective rank in the whole list of desired values; percentages indicate the difference between the number of survey respondents desiring the value for Saudi Arabia and the number of survey respondents perceiving the value as currently existing in Saudi Arabia. Respondents: 18-35 years old. Fieldwork dates: October 29th –November 8th, 2020

Differences in organizational values persist across the public and private sector. **“Innovation”** was the most often cited value in the private sector, yet it was only the 10th most cited value in the public sector. This difference is particularly important as the country continues to invest in private sector development⁸.

Public sector respondents, meanwhile, were most likely to cite **“cooperation”** as the top value observed in their sector, whereas in the private sector, this was only the 9th most cited value. A similar trend is observable with **“justice,”** which ranked third in

the public sector, but only 13th in the private sector. Values cited principally by private sector employees include **“discipline,” “competitive,” “responsible,”** and **“prosperous,”** while values cited principally by public sector employees included **“mercy,” “perseverance,” “safety,”** and **“dedication.”**

Beyond these differences, there were commonalities across the sectors – with **“honesty,” “commitment,” “equality,” “integrity,” “development,”** and **“creativity”** all being highly cited by both public and private sector respondents.

PRIVATE VS PUBLIC SECTOR

RANK	PRIVATE SECTOR	PUBLIC SECTOR
1	Innovation	Honesty
2	Development	Commitment
3	Honesty	Equality
4	Commitment	Cooperative
5	Equality	Justice
6	Integrity	Discipline
7	Discipline	Creativity
8	Cooperative	Development
9	Competitive	Innovation
10	Responsible	Integrity
11	Justice	Patience
12	Creativity	Perseverance
13	Perseverance	Collaboration
14	Prosperous	Humility
15	Modern	Safe



Sum of 3 top-ranked values describing respondents' sector of employment – Open-ended question

Respondents: 18-35 years old

Fieldwork dates: October 29th –November 8th, 2020

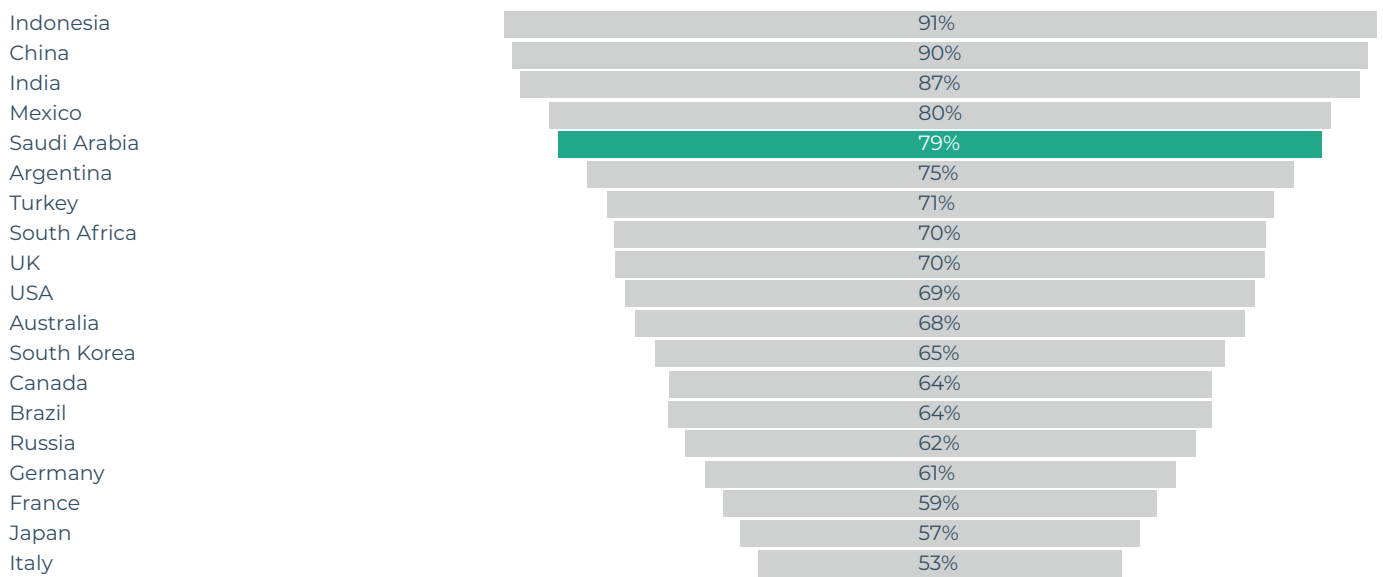
Value Jump = difference between desired and current values. Positive: people desire more of the value than they observe; negative: people observe more of the value than they desire.

YOUNG PEOPLE ARE GENERALLY POSITIVE ABOUT ENTREPRENEURSHIP IN INTERNATIONAL COMPARISON.

The second objective of Vision 2030 aims at “nurturing a culture of innovation and entrepreneurship and the growth of small- to medium-sized enterprises.”⁹

Saudi youth are generally positive about entrepreneurship, especially young entrepreneurs. Specifically, 79% of young people surveyed for Misk Foundation supported research ahead of the Y20 believed that people in Saudi Arabia were more likely to support young entrepreneurs over older entrepreneurs, more than in other G20 countries.

How likely are people in your country to support young entrepreneurs over older entrepreneurs?



Q: How likely are people in your country to support young entrepreneurs over older entrepreneurs?
 Cross G20 comparison
 Under 35 respondents
 Fieldwork dates: 8th – 18th September 2020

Saudi Arabia’s 2030 Vision sets out a plan to create job opportunities for citizens through supporting SME entrepreneurship, and entrepreneurship will be key to harness Saudi Arabia’s large young population and educated female workforce.

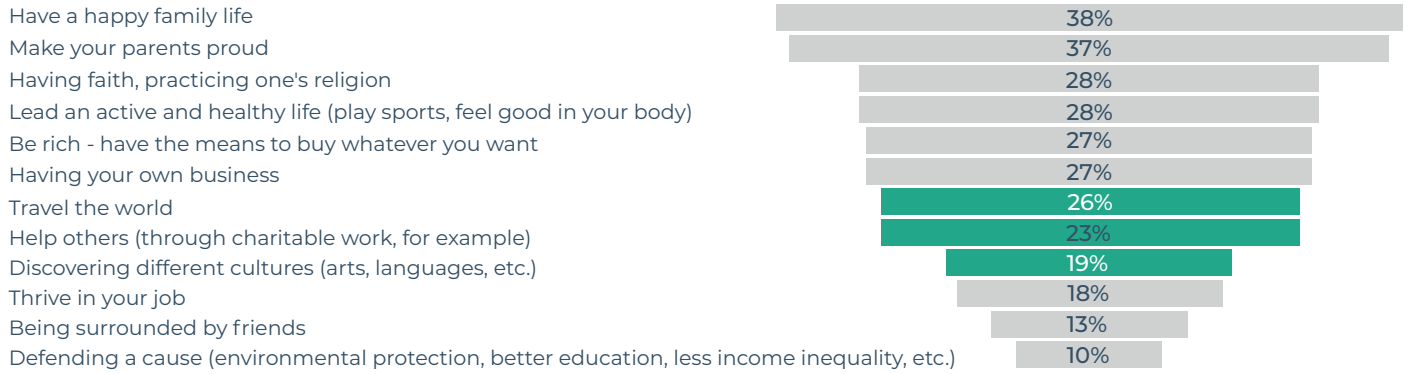
2.3. KEEN ON SELF-DEVELOPMENT

The stability of the Kingdom creates a supportive environment for young people to focus on their own self-development. An **ambition to travel the world** is also increasingly common, with more than 1 in 4 young people identifying it as one of their top motivators. A **desire to discover new cultures** is also popular, being cited as a top ambition by almost 1 in 5 respondents, suggesting some enthusiasm for

Vision 2030’s work to develop the Kingdom’s cultural and entertainment offerings.

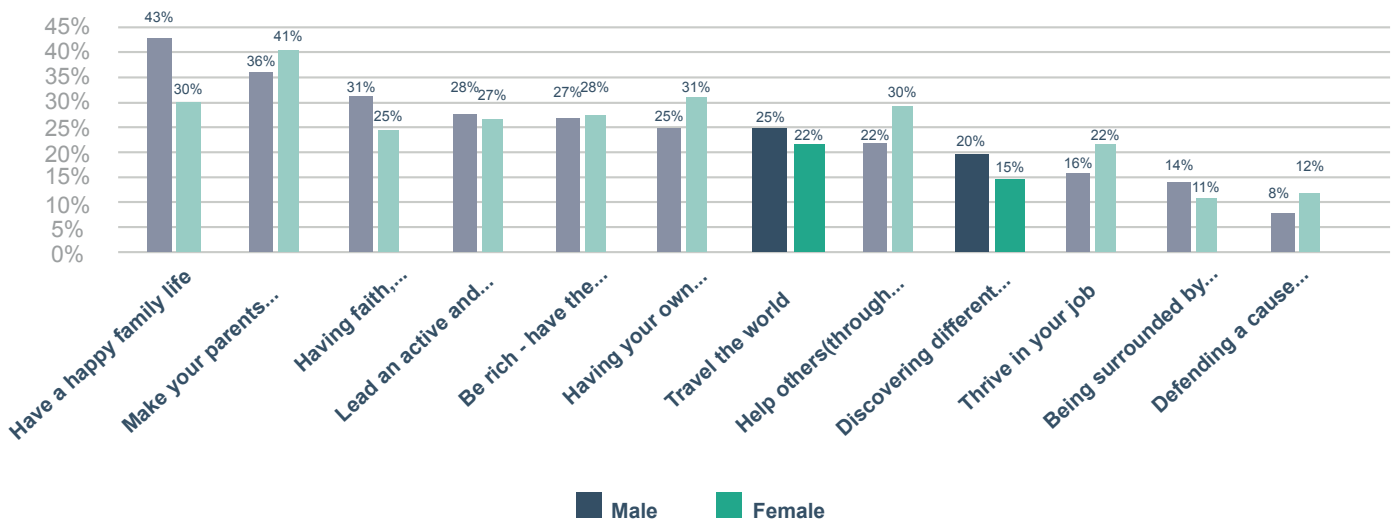
Young men more frequently cite such ambitions than young women (five percentage points higher for discovering new culture cultures and three percentage point higher for world travel).

AMBITIONS THAT GUIDE YOUTH ACTIONS



Q: Please select up to three of the following ambitions that guide most of your actions?
 Sum of respondents choosing each ambition as first, second, or third choice.
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

AMBITIONS THAT GUIDE YOUTH ACTIONS

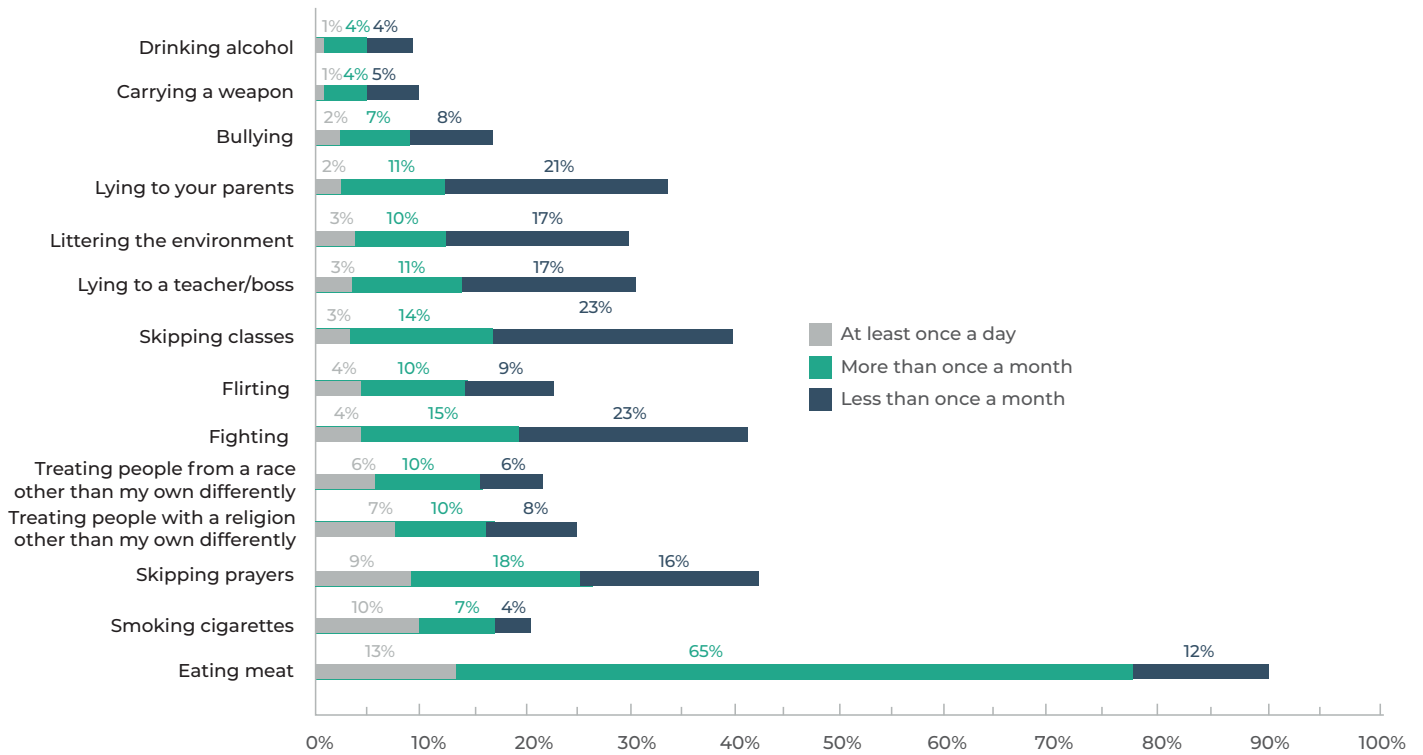


Q: Please select up to three of the following ambitions that guide most of your actions?
 Sum of respondents choosing each ambition as first, second, or third choice.
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

Some of the behaviors reported by young people suggest a willingness to try new experiences (and indeed, a greater willingness than other demographic groups within the population). The fast pace of change is certainly enabling young

people to test boundaries in ways that would have not been thinkable before the Vision 2030 was put into action. Remarkably, these behaviors do not vary significantly by gender, age, or region.

HOW OFTEN DO YOU PRACTICE EACH OF THE FOLLOWING BEHAVIOURS?



Q: How often do you practice each of the following behaviors?

Respondents: 18-35 years old

Fieldwork dates: October 29th –November 8th, 2020

Note: More than once a month = sum of respondents replying “one to five times a week” and “one to five time a month”

Note: Less than once a month = sum of respondents replying “six to twelve times a year” and “one to five time a year”

The personal values identified by young people in 2020 include several values related to personal development and growth. Many of these reflect the trends identified already in this report, including

“ambition,” “achievement,” and “being the best.” Furthermore, “continuous learning” is ranked 14th among 2020 personal values, emphasizing readiness for lifelong learning among youth.

TOP PERSONAL DEVELOPMENT-RELATED VALUES RANKING AMONG ALL VALUES, BY YEAR

2020		2019		2018	
Ambition	#2	Positivity	#1	Ambition	#2
Achievement	#3	Self-confidence	#6	Achievement	#5
Being liked	#4	Integrity	#8	Being liked	#6
Being the best	#9	Personal freedom	#19	Community involvement	#15
Continuous learning	#14	Self-reliance	#20	Continuous learning	#25
Discipline	#22	Discipline	#24	Patience	#31
Community involvement	#26	Ambition	#30	Self-confidence	#33
Determination	#30	Determination and perseverance	#33	Enthusiasm	#41
Patience	#34	Wisdom	#35	Self-reliance	#45
Enthusiasm	#41	Personal fulfilment	#38	Personal freedom	#48

10 top-ranked family-related personal values, chosen out of a list of 106 values, and their respective rank in the whole list of values
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020; October 2019; March 2018

Youth are rather optimistic and self-assured. **“Positivity”** and **“self-reliance”** were the top-ranked personal development-related values that young

people want the most for their country’s culture. **“Creativity”** and **“belonging”** were among the least.

MOST AND LEAST DESIRED PERSONAL DEVELOPMENT-RELATED VALUES

PERSONAL DEVELOPMENT-RELATED VALUE JUMPS

Positivity	#3	+244%
Self-reliance	#14	+129%
Personal freedom	#17	+114%
Educational opportunities	#66	-8%
Creativity	#81	-21%
Belonging	#90	-37%



3 most and 3 least desired personal development-related values, chosen out of a list of 115 values, and their respective rank in the whole list of desired values; percentages indicate the difference between the number of survey respondents desiring the value for Saudi Arabia and the number of survey respondents perceiving the value as currently existing in Saudi Arabia

Respondents: 18-35 years old

Fieldwork dates: October 29th –November 8th, 2020

Value Jump = difference between desired and current values. Positive: people desire more of the value than they observe; negative: people observe more of the value than they desire.

2.4. COVID-19 HAS SPARKED PERSONAL REFLECTION

This research was undertaken during the COVID-19 pandemic. Saudi youth are concerned about the impact of the pandemic and expect that it will precipitate some long-run changes in the world of work. Many report that they are more likely to have changed their behaviors because of the pandemic.

COVID-19 and **health concerns** are important sources of stress for young people with COVID-19 ranked as the fifth biggest source of stress amongst those surveyed.

MAIN SOURCES OF STRESS FOR YOUTH



Q: From the list of items below, rank the top 5 sources of stress for you personally
 Weighted sum of respondents ranking each ambition as first (weighted 1), second (weighted 0.9), third (weighted 0.81), fourth (weighted 0.729), or fifth (weighted 0.656) choice.
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

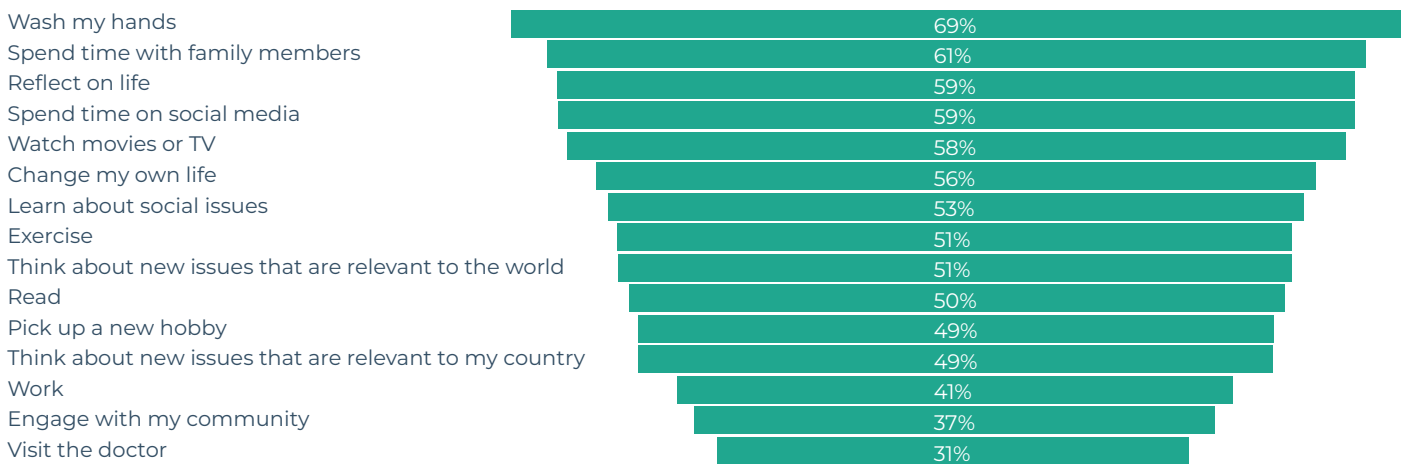
Young people have changed aspects of their lives in response to COVID-19. To explore the impact of the pandemic on the lives of young women and men, we asked survey respondents to report how the pandemic has changed their activities. In response, 78% said they were now more likely to reflect on their own lives, with a similar number (77%) reporting they were now more likely to make changes to their lives.

Some generally positive side effects of the disruption to ordinary life caused by the pandemic can also be identified. For example, 82% of respondents stated that they are now more likely to spend time with family, while 64% stated that they are more likely

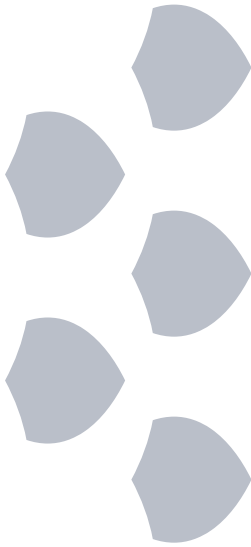
to exercise, a change in line with Vision 2030's goal to increase the number of citizens who exercise regularly.

Many have also used this time to engage in global challenges or activities. Two-thirds of respondents reported that they were more likely to have picked up a hobby due to the pandemic, with a similar number stating they were more likely to read. Additionally, 71% of Saudi youth reported that they were now more likely to engage with global challenges, with a similar number (68%) now more likely to think about issues affecting the Kingdom.

AS A RESULT OF COVID, HAVE YOU BECOME MORE OR LESS LIKELY TO...



Q: As a result of COVID-19, have you become more or less likely to...
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020
 Note: sum of respondents per category who said, "A lot more likely" or "Somewhat more likely" (i.e., net more likely)

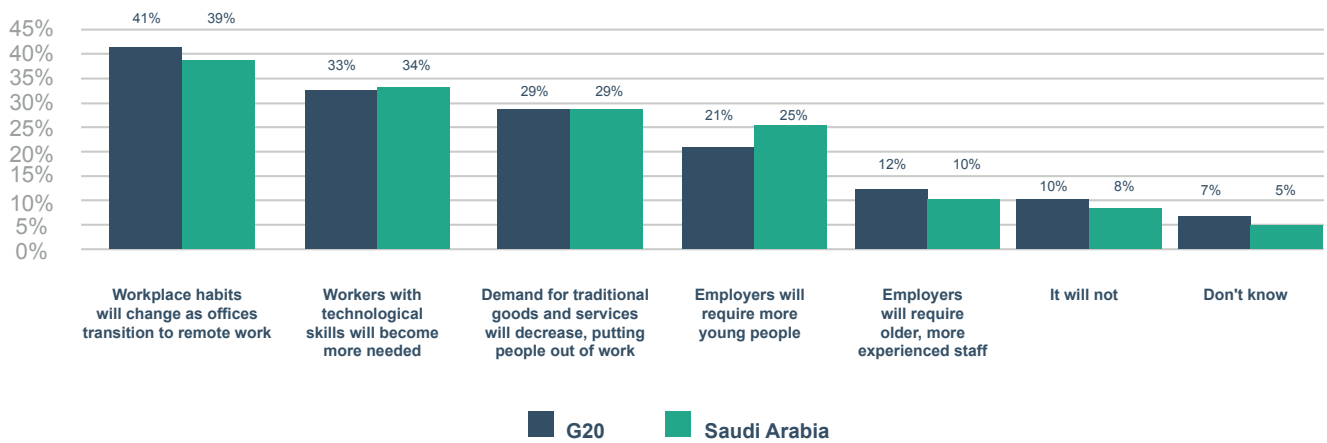


Young people expect Covid-19 to impact on their work

Research undertaken by MiSK ahead of the Y20 meeting provides additional insight into the views of young people on the long-term implications of the pandemic on their work situation. Only 10% of Saudi youth believe that COVID-19 will not have an impact on their work situation.

Perceptions on the long-term effect on work are generally aligned with the nation's G20 peers, with one exception: Young people are 5% more likely to think employers will require more young people, yet another example of this generation's optimism.


IMPACT OF COVID-19 ON YOUTHS' CURRENT OR FUTURE WORK SITUATION





Q: How will Covid-19 affect your current or future work situation?
 Sum of respondents selecting options as work-related factors affected by COVID-19 - G20 countries average versus Saudi respondents
 Respondents: 18-35 years old
 Fieldwork dates: September, 8th – 18th 2020




3. SAUDI ARABIA'S HOPES AND DREAMS

- 

Saudi youth are centered on **community** → Among young men's' ambitions, "faith" ranks 3rd; helping ranks joint 3rd for women. "Social trust" is among the most desired cultural values.
- 

Saudi youth expect more **social cohesion** → "Employment opportunities" and "future generations" rank among the top-10 desired culture values, especially for over 35 respondents.
- 

Saudi youth rely on **peace and stability** → 40% of respondents identified "safety" as the value that best characterizes the country.
- 

Saudi youth are optimistic about **social transformation** → 45% of respondents believe the country is changing quickly. Most young people are comfortable with the speed of change.



3.1. COMMUNITY REMAINS CORE

Even in the context of rapid change in the Kingdom, young people continue to value the role that community plays in their lives. Personal values such as **"caring," "commitment,"** and **"belonging"** ranked highly, consistent with previous years.

TOP COMMUNITY-RELATED VALUES RANKING AMONG ALL VALUES, BY YEAR

2020		2019		2018	
Caring	#5	Friendship	#2	Caring	#3
Commitment	#11	Integrity	#8	Commitment	#9
Belonging	#16	Faith	#16	Community involvement	#15
Community involvement	#26	Trust	#17	Integrity	#18
Friendship	#31	Islamic principles	#21	Friendship	#32
Faith	#35	Wisdom	#35	Trust	#38
Marriage/family	#39	Belonging	#41	Control	#40
Islamic principles	#42	Pride	#61	Pride	#46
Wisdom	#66	Commitment	#66	Wisdom	#49
Stability	#71	Community involvement	#67	Quality of life	#63

10 top-ranked community-related personal values, chosen out of a list of 106 values, and their respective rank in the whole list of values

Respondents: 18-35 years old

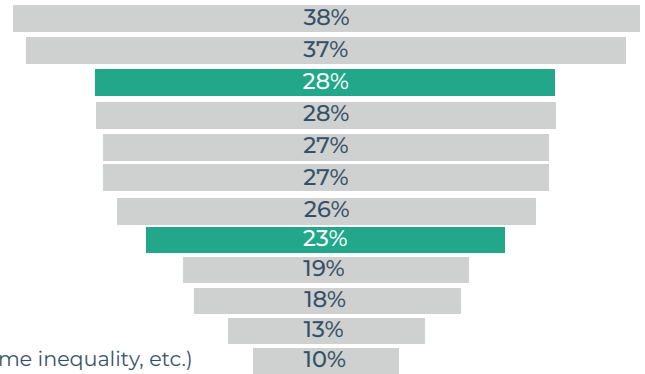
Fieldwork dates: October 29th –November 8th, 2020; October 2019; March 2018

Faith is an important part of this, with **“Islamic principles”** ranking highly in both 2020 and 2019. Indeed, only 2% of survey respondents said that their top fears for the Kingdom included the **“abandonment of religion.”** Meanwhile, 28% of respondents said that having **“faith”** and **“practicing**

their religion” was one of the top ambitions that guided most of their actions, with young men slightly more likely to cite religious observance as a guiding ambition than young women. Less than 1 in 10 young people reported that they drank alcohol, with 1 in 20 drinking more than once per month.

AMBITIONS THAT GUIDE YOUTH ACTIONS

- Have a happy family life
- Make your parents proud
- Having faith, practicing one's religion
- Lead an active and healthy life (play sports, feel good in your body)
- Be rich - have the means to buy whatever you want
- Having your own business
- Travel the world
- Help others (through charitable work, for example)
- Discovering different cultures (arts, languages, etc.)
- Thrive in your job
- Being surrounded by friends
- Defending a cause (environmental protection, better education, less income inequality, etc.)

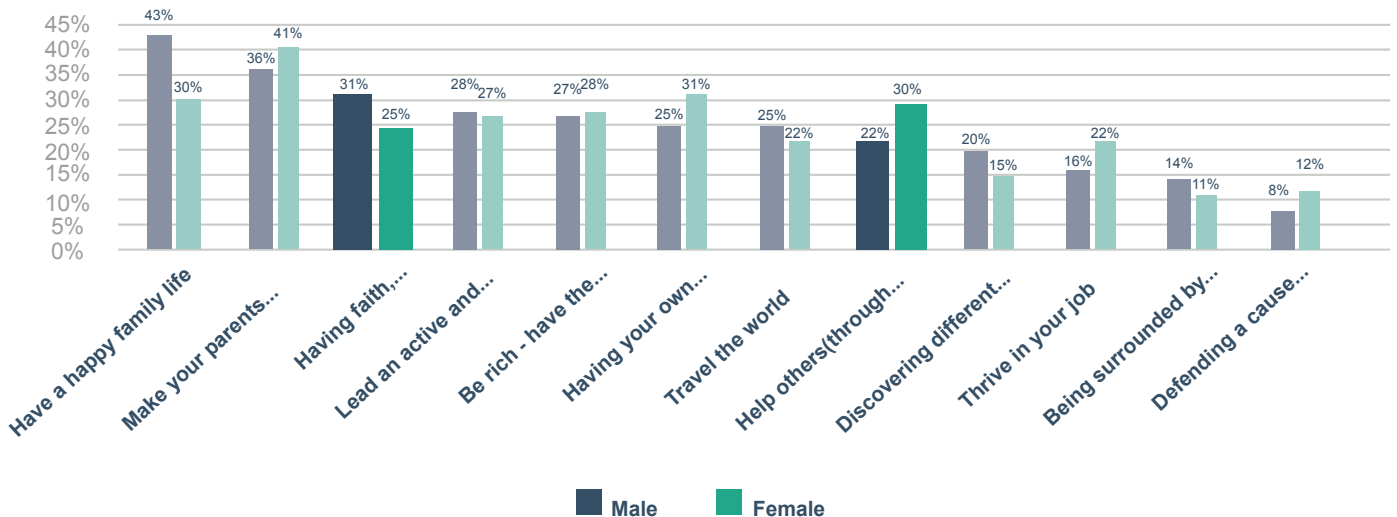


Q: Please select up to three of the following ambitions that guide most of your actions?
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

Given the target in Vision 2030 to boost volunteering in the Kingdom, it is noteworthy that **“service to others”** (through, for example, undertaking

charitable works) was cited as a guiding ambition by a sizeable minority of respondents, particularly young women, of which 30% selected it as a top ambition.

AMBITIONS THAT GUIDE YOUTH ACTIONS



Q: Please select up to three of the following ambitions that guide most of your actions?
 Sum of respondents choosing each ambition as first, second, or third choice
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

This focus on community reflects the emphasis placed on social capital in the country. Vision 2030 aims to increase the Kingdom’s standing in the World Bank’s Social Capital Index from 26th to 10th place by 2030¹⁰. Young people agree with this goal

and rate **“trust”** and **“wisdom”** among the most desired community-related values. Unsurprisingly, **“fear for the future”** and **“lack of clear vision”** rank among the least.

MOST AND LEAST DESIRED COMMUNITY-RELATED VALUES

COMMUNITY-RELATED VALUE JUMPS		
Trust	#13	+138%
Quality of life	#18	+113%
Wisdom	#19	+110%
Belonging	#90	-37%
Fear for the future	#94	-57%
Lack of clear vision	#110	-83%



3 most and 3 least desired community-related values, chosen out of a list of 115 values, and their respective rank in the whole list of desired values; percentages indicate the difference between the number of survey respondents desiring the value for Saudi Arabia and the number of survey respondents perceiving the value as currently existing in Saudi Arabia.

Respondents: 18-35 years old

Fieldwork dates: October 29th –November 8th, 2020

Value Jump = difference between desired and current values. Positive: people desire more of the value than they observe; negative: people observe more of the value than they desire.

3.2. More inclusion is needed

Young people seem to feel the nation’s transformation under Vision 2030 has been positive. They want their country’s culture to be inclusive and compassionate, and they generally feel that their expectations are met. A comparison between

perceived and desired values for 2020 shows that 7 of the top 10 desired values also are featured in the top 10 current cultural values. A key exception is **“employment opportunities,”** a topic already explored in Section 2.2.

TOP10- RANKED PERCEIVED AND DESIRED CULTURAL VALUES 2020

PERCEIVED CULTURAL VALUES	DESIRED CULTURAL VALUES
Accountability	Acceptance
Collaboration	Accountability
Compassion	Compassion
Belonging	Caring for the disadvantaged
Acceptance	Employment opportunities
Affordable housing	Affordable housing
Caring for the disadvantaged	Collaboration
Effective healthcare	Concern for future generations
Caring for the elderly	Animal welfare
Entertainment	Caring for the elderly



Top-ranked perceived cultural values and desired cultural values out of a list of 115 values; colors and bold frames indicate repetition across categories

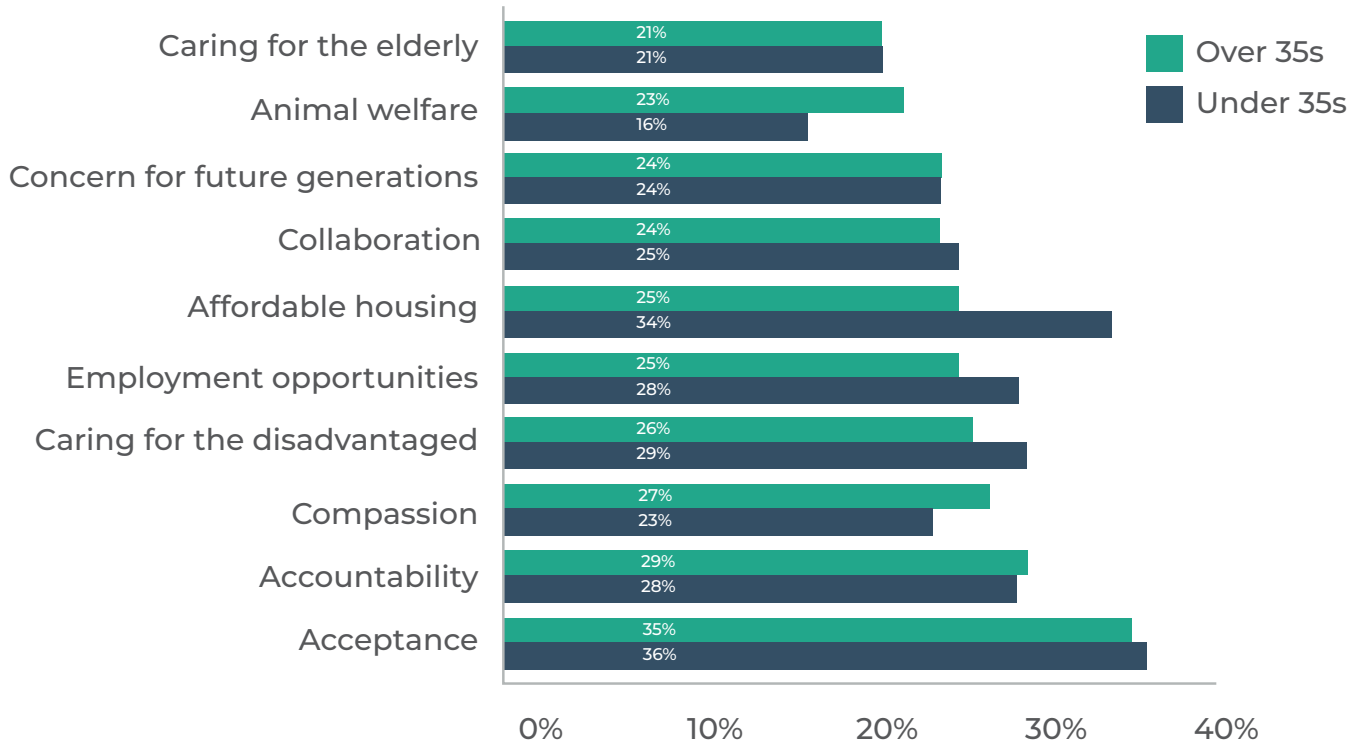
Respondents: 18-35 years old

Fieldwork dates: October 29th –November 8th, 2020

Differences between generations are minimal but telling. Older respondents are significantly more likely to value concrete concerns like **“affordable housing.”** The generation under 35 values

“compassion” and more, suggesting that inclusion becomes a more pressing concern as citizens mature.

TOP10- RANKED DESIRED CULTURAL VALUES 2020



Top-ranked desired cultural values out of a list of 115 values
 All respondents – Broken down by age (18-35 and over-35)
 Fieldwork dates: October 29th –November 8th, 2020

Indeed, a key shift is underway in expectations. As the nation becomes more prosperous, young people appear less preoccupied with social welfare as a material concern and increasingly worried about inclusion. Desired cultural values have changed markedly during the past few years. Several of the more welfare-related concerns that

characterized 2018 and 2019 – **“affordable housing,” “collaboration,” “caring for the disadvantaged–”** and **“concern for future generations”** – were ranked lower in 2020. These worries lost ground to more philosophical expectations of **“acceptance,” “accountability,”** and **“compassion.”**

TOP DESIRED CULTURAL VALUES, BY YEAR

2020	2019	2018
Acceptance	Educational opportunities	Affordable housing
Accountability	Financial stability	Collaboration
Compassion	Positivity	Caring for the disadvantaged
Caring for the disadvantaged	Employment opportunities	Concern for future generations
Employment opportunities	Effective healthcare	Caring for the elderly
Affordable housing	Quality of life	Acceptance
Collaboration	Integrity	Commitment
Concern for future generations	Peace	Educational opportunities
Animal welfare	Poverty reduction	Effective healthcare
Caring for the elderly	Tolerance	Accountability

Top-ranked desired culture values chosen out of a list of 115 values
 Comparison across 2020, 2019, 2018
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020; October 2019; March 2018

Conversely, except for 2019, perceived cultural values have stayed rather constant over time. This suggests that the earlier phases of implementation of Vision 2030 had a strong effect on Saudis' improved sense of self.

TOP PERCEIVED CULTURAL VALUES, PER YEAR

2020	2019	2018
Accountability	Positivity	Collaboration
Collaboration	Islamic principles	Accountability
Compassion	Social cohesion	Caring for the elderly
Belonging	Integrity	Compassion
Acceptance	Law enforcement	Caring for the disadvantaged
Affordable housing	Tradition	Commitment
Caring for the disadvantaged	Educational opportunities	Acceptance
Effective healthcare	Leadership	Complacency
Caring for the elderly	Peace	Peace
Entertainment	Ethics	Concern for future generations

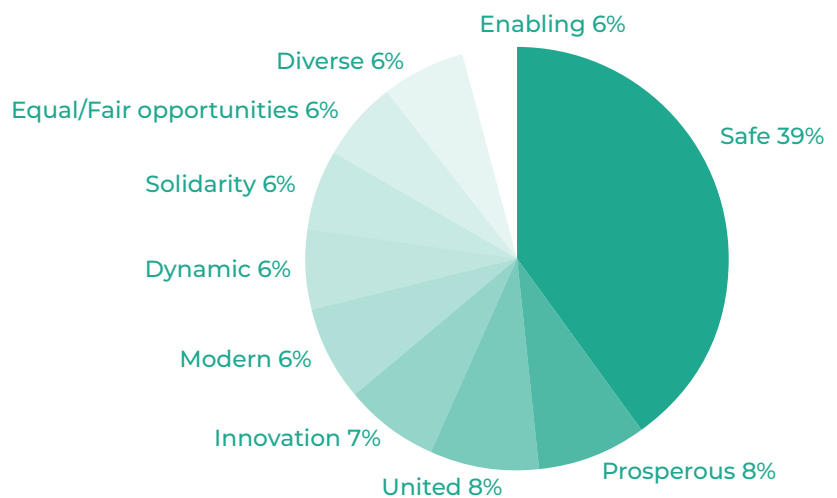
Top-ranked perceived culture values out of a list of 115 values, color coding indicates repetition across years
 Comparison between top-ranked in 2020, 2019, 2018
 Respondents: 18-35 years old

3.3. A NATION THAT VALUES PEACE AND SAFETY

When asked to choose among 10 words that best described the Kingdom, “safe” was the most frequently selected value, by a considerable margin. “Prosperous” and “united” also performed well.

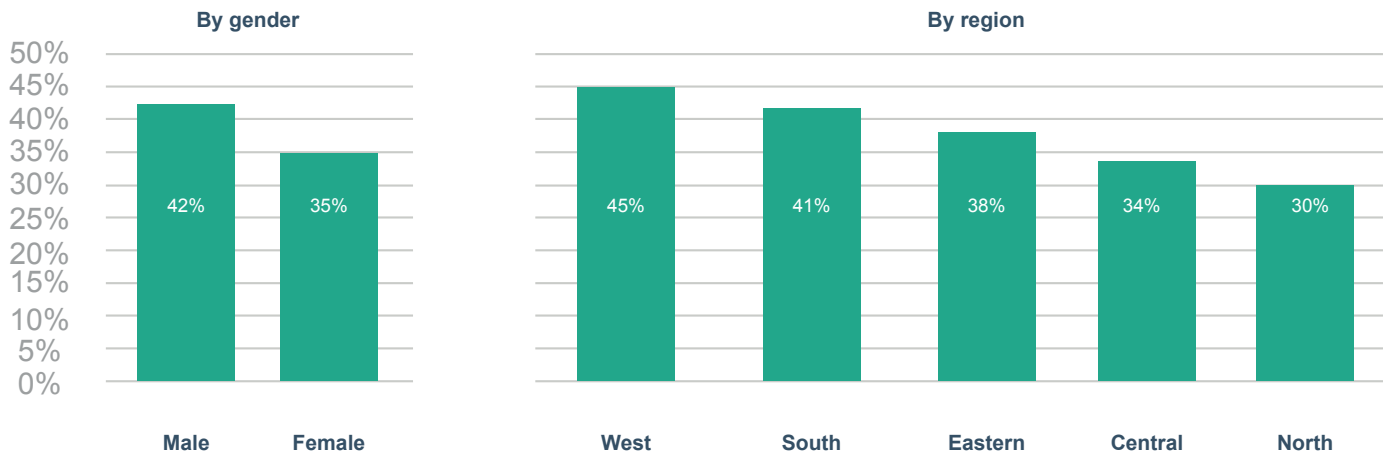
Men and those residing in the west and south of the country were especially likely to describe their country this way.

VALUES THAT BEST DESCRIBE SAUDI ARABIA 2020



Q: Rank the following values, based on how well they describe Saudi Arabia.
 Sum of respondents' #1 ranked values
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

PERCEPTION OF SAFETY ACROSS GENDERS AND REGIONS 2020

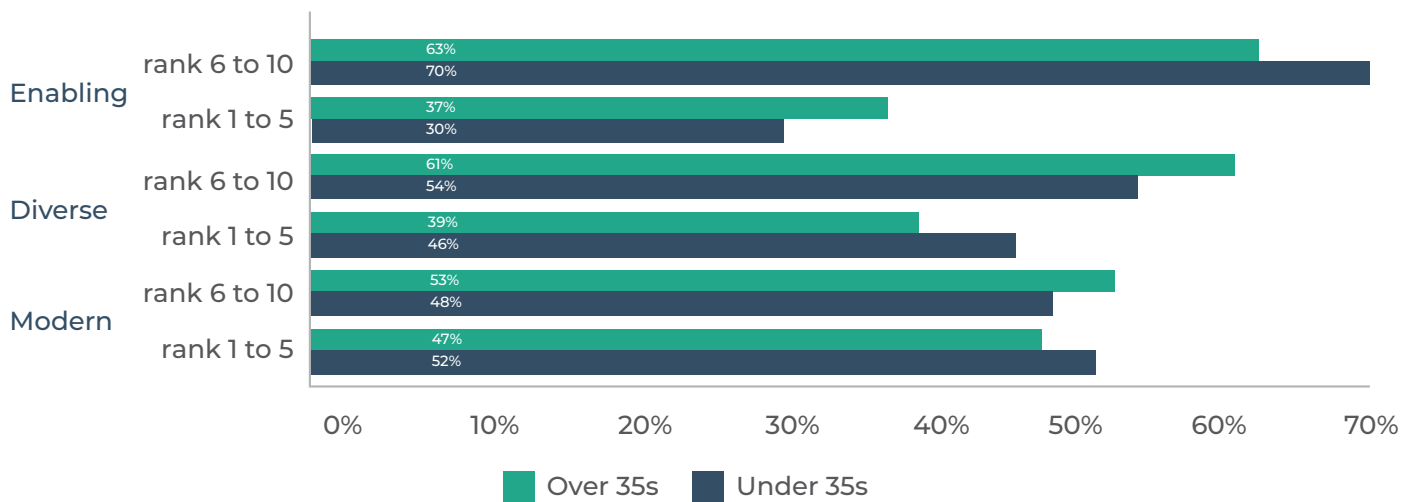


Q: Rank the following values, based on how well they describe Saudi Arabia.
 Share of respondents ranking “safe” as #1 value to describe Saudi Arabia – Broken down by gender and by region
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

Some differences can be observed between the perspectives of young people and those over the age of 35, with young people being marginally less likely than their fellow citizens to rank the “modern” and “diverse” values as best describing the country.

“Enabling” attracted the fewest #1 rankings, with only 4% of young people selecting it as the top new value, and only 37% ranked it in the top 5 – though it appears to have had more resonance with younger people than their older compatriots.

VALUES THAT BEST DESCRIBE SAUDI ARABIA 2020



Q: Rank the following values, based on how well they describe Saudi Arabia?
 Weighted sum of respondents ranking “enabling,” “diverse,” “modern” as first (weighted 1), second (weighted 0.9), third (weighted 0.81), etc. Respondents: 18-35 and over 35
 Fieldwork dates: October 29th –November 8th, 2020

While generally positive about the Kingdom’s perceived transformation, young people are nonetheless concerned about potential future shocks, particularly the potential for conflict and economic turbulence. More than 1 in 10 respondents said they were

concerned about war globally, the top-ranked fear, with a much smaller number concerned about conflict involving Saudi Arabia. Concerns around terrorism at home and abroad also ranked highly, suggesting that the Kingdom’s efforts to counter extremism will continue to be important.¹¹

FEARS FOR THE FUTURE OF SAUDI ARABIA/THE WORLD

RANK	FOR THE WORLD	FOR SAUDI ARABIA
1	Wars	Poverty
2	Poverty	Wars
3	Disease	Corruption
4	Corruption	Unemployment
5	Injustice	The economy
6	Terrorism	Racism
7	Unemployment	Enemies
8	Climate change	Climate change
9	Lack of security	Lack of security
10	Coronavirus	Terrorism
11	Pollution	High cost of living
12	Racism	Openness
13	Terrorism	Coronavirus
14	Bankruptcy	Ignorance
15	Disasters	Abandonment of religion



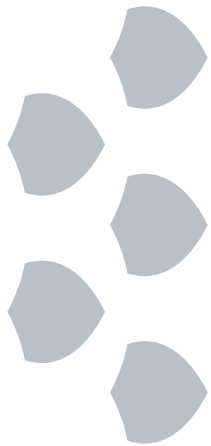
*Q: Two fears I have for the future of Saudi Arabia/the world? – Opened-ended question
Ranking of top-10 expressed fears for Saudi Arabia and the world
Respondents: 18-35 years old
Fieldwork dates: October 29th –November 8th, 2020*

Poverty was the top domestic concern for young people, cited by around 1 in 20 respondents, with other economic issues also ranking highly, including unemployment, the economy, and high costs of living. For the wider world, poverty was the second highest fear, with unemployment also being cited by 5% of respondents.

Corruption also placed highly, as the 4th most cited fear for the world and 3rd most cited fear for the nation, thus reinforcing the need for the Kingdom to uphold the commitment to transparency and its zero-tolerance approach to corruption set out in Vision 2030.

Perhaps surprisingly, climate change was only the 8th ranked fear that young people had for both the world and for the Kingdom. While coronavirus was cited by some respondents, it ranks relatively lowly, just 10th in a ranking of fears for the world and 13th in fears for Saudi Arabia.

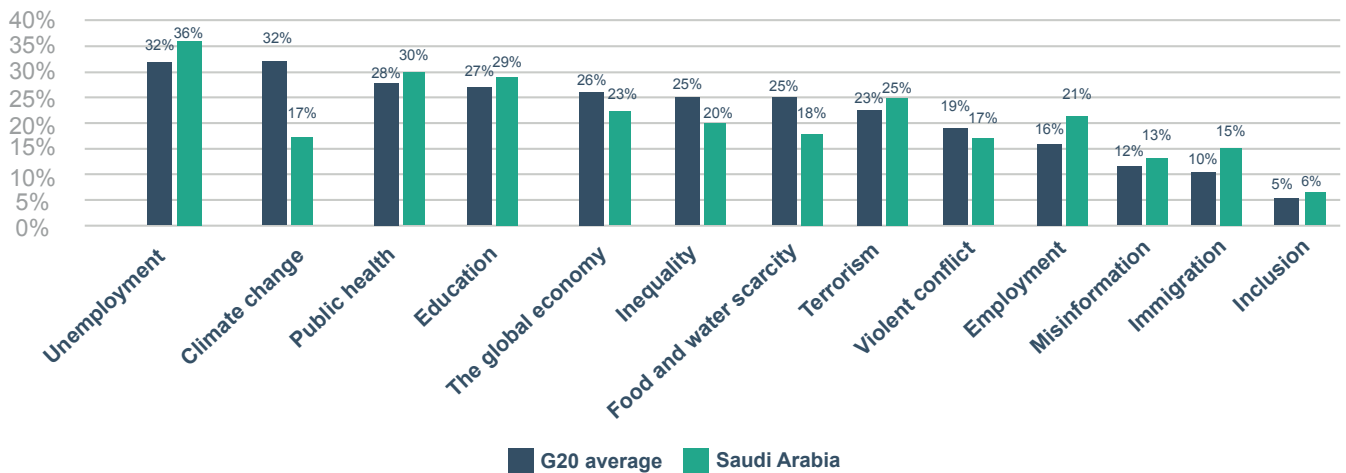




In international comparison, young people are more concerned about unemployment and less concerned about climate change

Research previously undertaken by MiSK that examined youth priorities across the G20 allows for international comparison. Tackling unemployment is the top priority for action among Saudi youth, identified by 36% of respondents, compared to an average of 32% across the G20. At the same time, young people in Saudi Arabia are less concerned about climate change than their peers in other G20 countries.

ISSUES THAT NEED TO BE SOLVED MOST URGENTLY



Q: Out of the following global issues, select the three that need to be solved most urgently?
 Sum of respondents choosing each of the global issues as first, second, or third choice – G20 countries average versus Saudi respondents
 Respondents: 18-35 years old
 Fieldwork dates: September 8-18th, 2020

Young people’s top hopes for the world were largely centered around the basic needs of peace, safety, and security. Turning to hopes for their own country, the most common responses were more economic in nature, perhaps reflecting the relative presence of peace, safety, and security in the Kingdom.

The top 3 hopes for their country identified by young people – **Development, Prosperity** and **Progress**

– align strongly with the overall direction of travel set out in Vision 2030 to build a thriving economy (encompassing initiatives to boost the Kingdom’s global competitiveness and improve human capital) and to improve the quality of life of citizens¹². Some support for **social change** can also be identified, with freedom and equality among the top hopes expressed for both their own country and the wider world.

HOPES FOR THE FUTURE OF SAUDI ARABIA/THE WORLD

RANK	FOR THE WORLD	FOR SAUDI ARABIA
1	Peace	Development
2	Safety	Prosperity
3	Security	Progress
4	Development	Freedom
5	Justice	Equality
6	Freedom	Justice
7	Equality	Openness
8	Peace	Diversity
9	Love	Peace
10	Progress	Security
11	Unity	Economy
12	Health	Career opportunities
13	Prosperity	Unity
14	Tolerance	Innovation
15	Cooperation	Safety

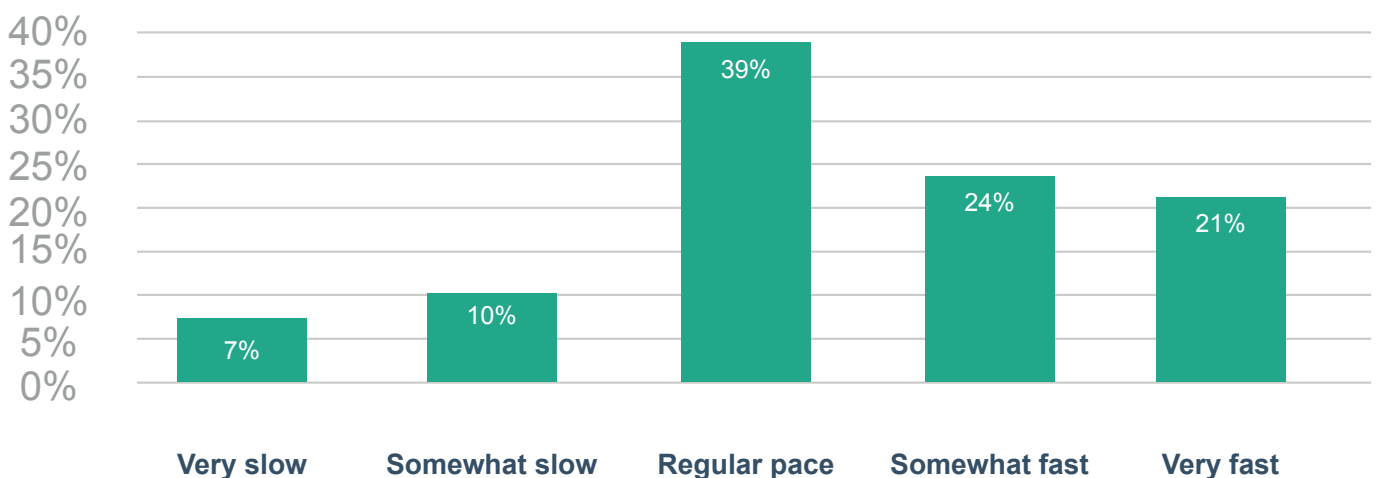


Q: Two hopes I have for the future of Saudi Arabia/the world?
 Ranking of top-10 expressed hopes for Saudi Arabia and the world
 Under 35 respondents

3.4. SOCIAL TRANSFORMATION PROMPTS OPTIMISM

Young people understand how fast their country is changing, with 45% perceiving that social transformation is happening quickly and only 17% percent perceiving that the pace of change is somewhat or very slow

SPEED OF SOCIAL TRANSFORMATION 2020

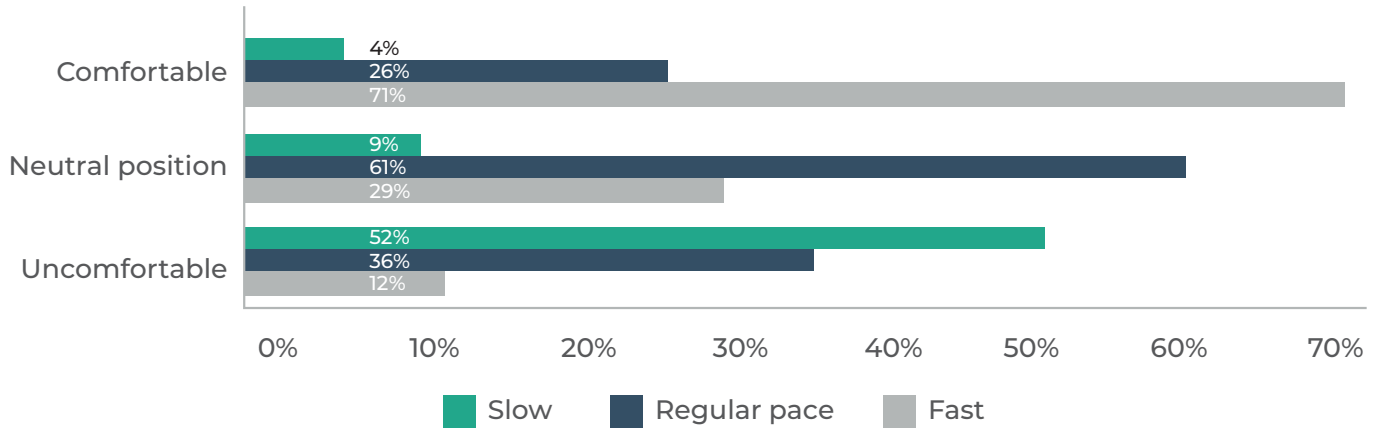


Q: How fast is social transformation happening in your country?
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020

Most young people are content with the speed of social change in the Kingdom, with only 22% stating that they are uncomfortable with speed of change.

Among those who feel that way, 52% perceive that the Kingdom is changing slowly, indicating that many people wish to see faster transformation.

SOCIAL TRANSFORMATION: SPEED VS LEVEL OF COMFORT AMONG YOUTH 2020

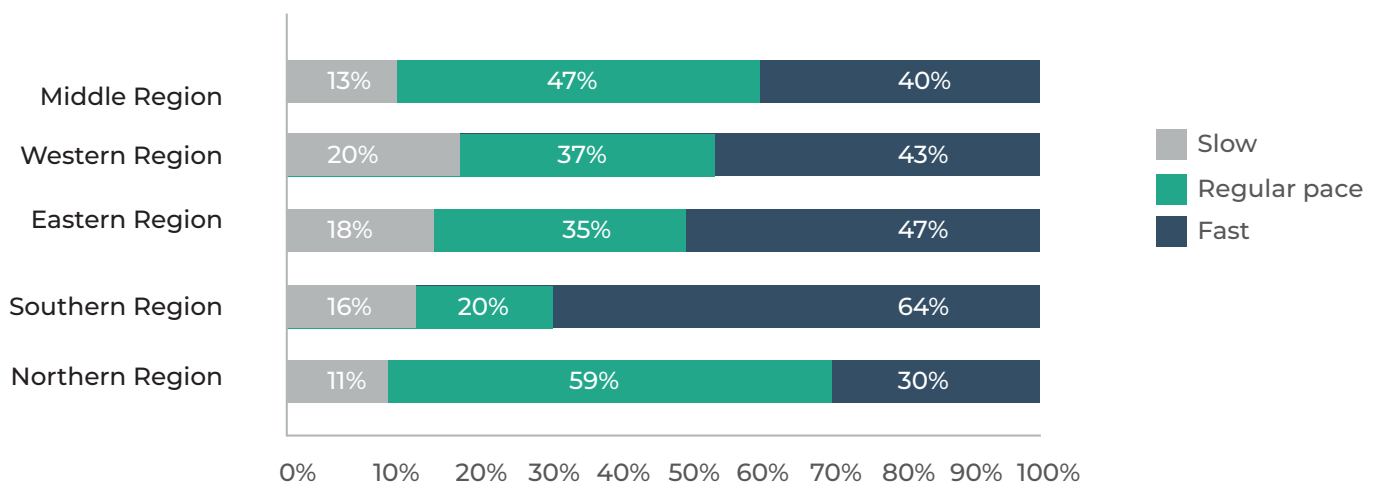


Q: How comfortable are you with the speed of social transformation in your country? How fast is social transformation happening in your country? – Comparison
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020
 Note: Uncomfortable = sum of respondents replying, “not comfortable at all” and “somehow uncomfortable”
 Comfortable = sum of respondents replying, “somehow comfortable” and “very comfortable”
 Slow = sum of respondents replying, “very slow” and “somewhat slow”
 Fast = sum of respondents replying, “somewhat fast” and “very fast”

Change may affect different regions at different paces, or at least produce contrasting perceptions of and tolerance to social transformation. This is hardly the case. Significant shares of respondents in each region (between 30% to 64%, depending on region) believe the country is changing quickly.

A key exception is the southern region of the country, where 64% of young people perceive that social transformation is happening quickly, almost 20% more than in other regions. Because the region is less developed economically, residents may want to see faster progress.

SPEED OF SOCIAL TRANSFORMATION BY REGION 2020



Q: How fast is social transformation happening in your country?
 Respondents: 18-35 years old
 Fieldwork dates: October 29th –November 8th, 2020
 Note: Slow = sum of respondents replying, “very slow” and “somewhat slow”
 Note: Fast = sum of respondents replying, “somewhat fast” and “very fast”

These results raise the question of why social transformation might be occurring too fast for some. It seems that for some, the disruption caused by rapid change is a source of stress and possibly loneliness.

A small minority of respondents identified social change and political issues as being top sources of stress in their lives – with 17% identifying the **current political climate** as a source of stress, 17% identifying the **current social status**, and 13% identifying **social transformation**.

SPEED OF SOCIAL TRANSFORMATION BY REGION 2020

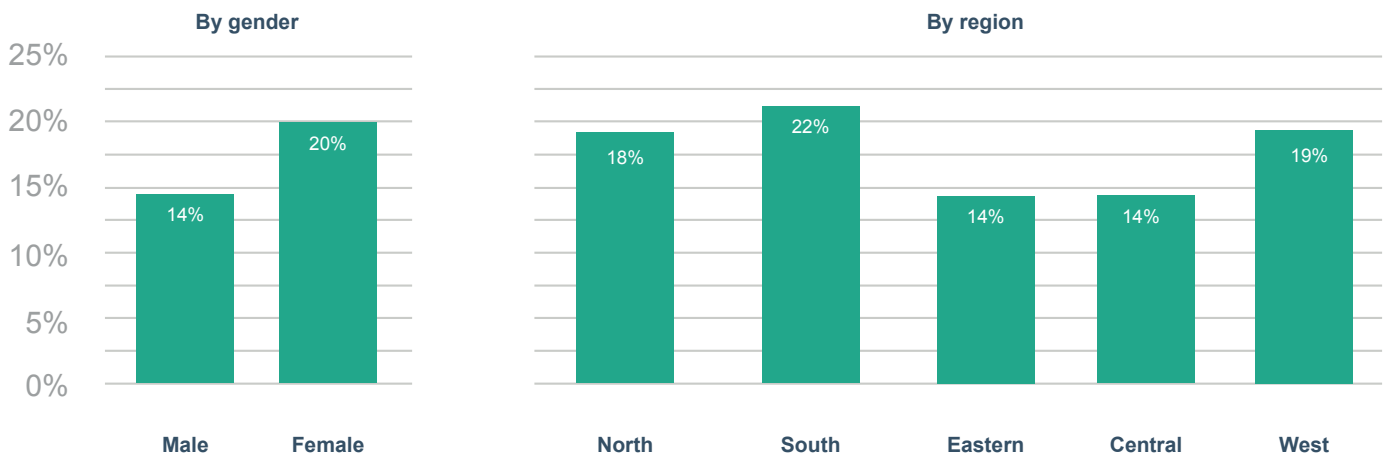


Q: From the list of items below, rank the top 5 sources of stress for you personally
 Weighted sum of respondents ranking each ambition as first (weighted 1), second (weighted 0.9), third (weighted 0.81), fourth (weighted 0.729), or fifth (weighted 0.656) choice
 Under 35 respondents
 Fieldwork dates: 29th October – 8th November 2020

These perceptions can vary significantly by gender and region. Women across the country and citizens in the south and west are more likely to worry about the current political climate.

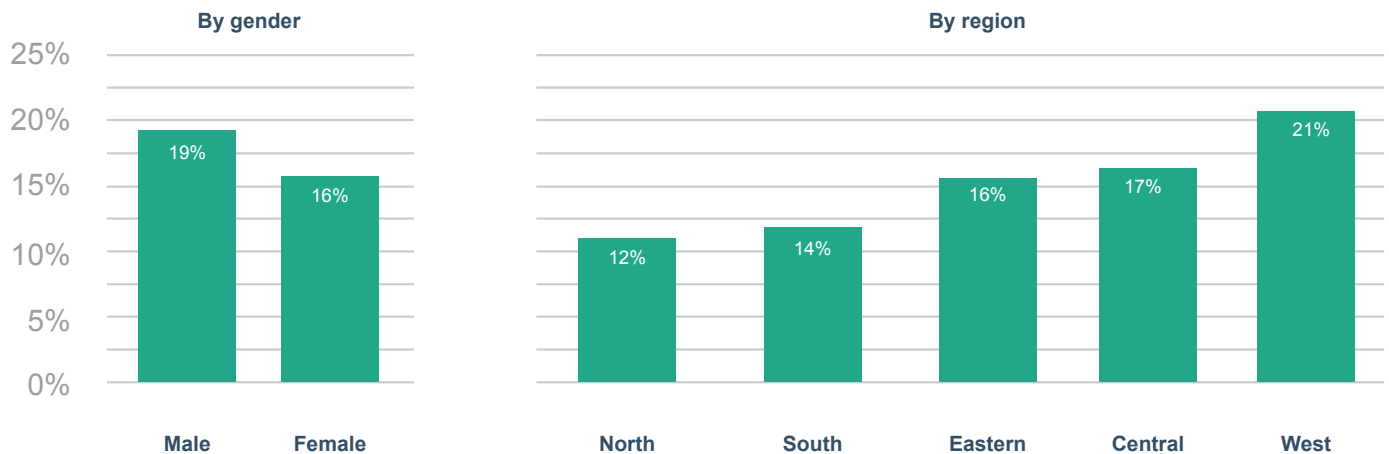
Men, particularly in the western region, are more concerned about their current social status.

POLITICAL CLIMATE AS A SOURCE OF STRESS BY GENDER AND REGION 2020



Q: From the list of items below, rank the top 5 sources of stress for you personally.
 Weighted sum of respondents ranking “the current political climate” as first (weighted 1), second (weighted 0.9), third (weighted 0.81), fourth (weighted 0.729), or fifth (weighted 0.656) choice
 Under 35 respondents – Broken down by gender and region
 Fieldwork dates: 29th October – 8th November 2020

CURRENT SOCIAL STATUS AS A SOURCE OF STRESS BY GENDER AND REGION



Q: From the list of items below, rank the top 5 sources of stress for you personally.
 Weighted sum of respondents ranking "the current social status" as first (weighted 1), second (weighted 0.9), third (weighted 0.81), fourth (weighted 0.729), or fifth (weighted 0.656) choice
 Respondents: 18-35 years old
 Fieldwork dates: October 29th – November 8th, 2020

Attitudes towards social transformation have remained stable over time, with 9 of 10 social transformation-related personal values from 2018 recurring in 2019 and 2020.

Such recurrence demonstrates stability of values over time. **"Ambition," "concern for future generations,"** and **"enthusiasm"** rank in the top 5 in 2020.

TOP SOCIAL TRANSFORMATION-RELATED VALUES RANKING AMONG ALL VALUES, BY YEAR

2020		2019		2018	
Ambition	#2	Positivity	#1	Ambition	#2
Adaptability	#6	Ambition	#30	Courage	#20
Concern for future generations	#37	Initiative	#36	Dialogue	#26
Enthusiasm	#41	Global awareness	#43	Concern for future generations	#27
Global awareness	#43	Courage	#45	Initiative	#39
Dialogue	#46	Enthusiasm	#49	Enthusiasm	#41
Environmental awareness	#48	Live for the moment	#51	Innovation	#43
Ease with uncertainty	#50	Vision	#54	Openness	#54
Positivity	#57	Innovation	#58	Environmental awareness	#64
Openness	#59	Dialogue	#62	Making a difference	#65

10 top-ranked social transformation-related personal values, chosen out of a list of 106 values, and their respective rank in the whole list of values

Under 35 respondents – Broken down by year

Fieldwork dates: 29th October – 8th November 2020 / October 2019 / March 2018

MOST AND LEAST DESIRED SOCIAL TRANSFORMATION-RELATED VALUES



SOCIAL TRANSFORMATION-RELATED VALUE JUMPS

Positivity	#3	+244%
Openness to the world	#8	+150%
Live for the moment	#21	+100%
Islamic principles	#78	-17%
Centralized government	#85	-26%
Globalization	#87	-27%

3 most and 3 least social transformation-related desired values, chosen out of a list of 115 values, and their respective rank in the whole list of desired values; percentages indicate the difference between the number of survey respondents desiring the value for Saudi Arabia and the number of survey respondents perceiving the value as currently existing in Saudi Arabia.

Under 35 respondents

Fieldwork dates: 29th October – 8th November 2020

Value Jump = difference between desired and current values. Positive: people desire more of the value than they observe; negative: people observe more of the value than they desire.



4. Where do we go from here?



Understanding youth values, behaviors, and opinions in Saudi Arabia is crucial to understanding the direction that the country could take in future. Because values drive behaviors, they are important to understand for policy makers and businesses, such as when designing business propositions and public interventions. Youth is a particularly important community for a number of reasons: lack of representation in formal decision making, impact on their lives, and age when people search for and

embrace values that influence them for life. Youth are, therefore, a powerful force for transformation. By better understanding youth values, Saudi Arabia can strengthen the current social transformation.

In this section, we go a step further and identify examples of initiatives that can be taken by the different actors in the country to harness the power of youth values for the country's transformation.

4.1. A systematic, regular assessment of youth values in Saudi Arabia

Over the past four years, this study has greatly contributed to a better understanding of how values change in the Kingdom. Given the importance of a regular values assessment and its relevance, it is essential that this study continues and is further strengthened, for example by :

- Increasing the frequency of the survey to twice a year, given the fast and deep social transformation taking place in the country.
- Continuously improving the methodology, to even better adapt the assessment to Saudi Arabia's cultural context and the rapid transformation taking place in the Kingdom while ensuring comparability over time.

4.2. Address major concerns with specific projects

The major challenges identified in the survey should be addressed through specific projects. These challenges include: employment and financial stability, health, and family cohesion.

It seems obvious to make the data collected and the results obtained useful and relevant to the main concerns of young Saudi men and women highlighted by the survey. Key findings lead the following considerations:



CHALLENGE: Creating employment opportunities for all

POSSIBLE SOLUTIONS:

- **BRIDGING THE SKILLS GAP:** One of the main challenges to increasing private sector employment of youth in Saudi Arabia is the skills mismatch: youth do not possess the skills the private sector needs. This can be addressed through providing granular information on the skills needed and available. Initiatives such as Work4Youth, a public-private partnership with MasterCard Foundation, which is running a survey on the school-to-work transition could help to identify the most pressing barriers and skills gaps and provide a platform for dialogue.
- **FUTURE SKILLS MAPPING:** A skills assessment that captures the demand in the private sector could help educational institutions align the skills taught with the demands of the labor market, identifying key skills gaps by region and informing upskilling and reskilling. The assessment could also highlight the needs in Saudi Arabia, and this could be done through skills mapping by region and industry based on surveys of employers (similar to the Future of Jobs report).
- **CONNECTING YOUTH TO EMPLOYERS:** A young person's first job is particularly hard to get. A platform to connect young people with potential employers, as well as scholarships and training opportunities to get the right skillset, could help young professionals as they enter the workforce. The data shows that young people are motivated and serious about their careers. It could also help youth exchange with others on the challenges they face and provide insight, online training, and social media functionalities – e.g., GoodWall.
- **CROWDSOURCING LOCAL FUTURE OF WORK SOLUTIONS:** Employment creation is very specific to each country and the solutions may differ. To highlight Saudi solutions, a platform that crowdsources and highlights local social innovation initiatives that address employment creation could be envisaged.

POTENTIAL OUTCOME:

A deeper understanding of future skills and matchmaking capabilities will over time (1) inform curricula development, upskilling and reskilling offering and (2) provide a platform for dialogue between young people, educational training institutions, and employers.



CHALLENGE: Personal development and health; work life balance and well-being

POSSIBLE SOLUTIONS:

- **NATIONAL YOUTH HEALTH & WELL-BEING ASSESSMENT:** A more in-depth study on the subject would be helpful – e.g., the Youth Health and Wellbeing Assessment by the New South Wales Government, Australia.
- **NEEDS FOR SPORTS ACTIVITIES AND INFRASTRUCTURE:** Meeting the needs for sports, recreational, and entertainment activities seems relevant, especially in the context of the pandemic.
- **STRESS/MENTAL WELLBEING AWARENESS WEEK/DAY:** A campaign to start address stigma associated with stress during the COVID pandemic could promote healthy coping strategies.

POTENTIAL OUTCOME:

Development of an in-depth knowledge on this crucial aspect will reveal much about youth priorities, interest, and values to better target relevant projects in line with the growing needs of youth. Build positive change towards health awareness in a period of massive social transformation.



CHALLENGE: Youth priorities, such as sustainability, are not reflected in policy making processes.

POSSIBLE SOLUTIONS:

- **CONNECTING ACROSS GENERATIONS ON SUSTAINABILITY:** The care for family could give rise to a “future generations” workstream that raises awareness about the importance of future generations in today’s policy decisions. Because people care about family, they need to see policy through the eyes of their children and grandchildren.

This will bring long-term issues to the forefront of policy making, such as sustainability and creation of a more sustainable economic model, and this will help address those challenges that are currently unspoken for, such as bullying or harassment at school. Such results can be achieved either through awareness campaigns or through a formal role of a “commissioner for future generations,” which exists, for example, in Wales. The commissioner of future generations has the task to assess the impact of policy initiatives on future generations.

- **YOUTH CAFÉS** could also be considered to create opportunities for exchange, sharing, and dialogue across different parts of society and on topics of main challenges for youth. One example is the Youth Café implemented by the Western Cape Government in South Africa.

POTENTIAL OUTCOME:

Strengthen these existing support networks that are so crucial for young women and men, and reinforce the strong sense of social cohesion evident in this survey.

4.3. OPEN A NEW CHAPTER AND INNOVATE

The survey has shown growing appreciation of values such as conservation of nature, innovation, and equity among youth. These findings suggest an important opportunity to increase youth awareness of sustainability issues – for example, by integrating them in school curricula or extracurricular activities (initiatives to keep neighbourhoods clean, to save water and energy, information about climate

footprint of food, etc.). By doing so, Saudi Arabia could integrate skills development, innovative economic opportunities with sustainability initiatives. It is crucial to start thinking how the topic of sustainability can be addressed in the context of Saudi Arabia. Reflecting upon these key issues for Saudi Arabia and the world is an opportunity for the future of the country.

CONCLUSIONS

Youths are the key to Saudi Arabia's future. Young people's values, behaviors, and ambitions will guide the transformation of the society and ensure that the changes initiated under the Vision 2030 are sustainable and sustained. For this reason, we have systematically assessed and analyzed the values of youth for the past four years.

Building on previous years' work, this year's research has expanded the scope to explore behaviours, ambitions, and factors of stress, as well as hopes and fears for the country and the world, and this research provided a way forward for leaders in the Saudi ecosystem. We hope that this work will contribute to a better understanding of Saudi youth and inform the action of policy makers and other leaders in the Kingdom.

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- 1- Saudi Arabia is divided into 13 provinces, grouped for convenience into five regions.
 - 2- Saudi Youth Report in Numbers" released by the General Authority for Statistics (GASTAT)
 - 3- Vision 2030 National Development Strategy 2016-2030, 2016, page 15
 - 4- https://www.saudiembassy.net/sites/default/files/u66/Saudi_Vision2030_EN.pdf page 28
 - 5- World Bank databank. <https://data.worldbank.org/indicator/SP.DYN.TFRT.IN?locations=SA>. 2018 data.
 - 6- https://www.saudiembassy.net/sites/default/files/u66/Saudi_Vision2030_EN.pdf pg. 39
 - 7- World Bank, 2020
 - 8- <https://www.atlanticcouncil.org/wp-content/uploads/2020/06/Assessing-Saudi-Vision-2030-A-2020-review.pdf>
 - 9- Grand S., Wolff K., (2020), ASSESSING SAUDI VISION 2030: A 2020 REVIEW, Atlantic Council – Rafik Hariri Center for the Middle East. Available at: <https://www.atlanticcouncil.org/wp-content/uploads/2020/06/Assessing-Saudi-Vision-2030-A-2020-review.pdf>, page 16
 - 10- : https://www.saudiembassy.net/sites/default/files/u66/Saudi_Vision2030_EN.pdf page 31
 - 11- See, for example, Al-Otaibi, N. (2020) Vision 2030: Religious Education Reform in the Kingdom of Saudi Arabia. King Faisal Center for Research and Islamic Studies.
 - 12- <https://vision2030.gov.sa/en/programs/QoL>

Annex 1 – Methodology

The Saudi Youth Values Project is a multi-year research undertaking that aims to map Saudi youth's values based on a framework that includes key elements that shape young people's personalities. It is based on a representative survey of Saudi youth and aims to analyze how behaviors, thoughts, feelings, values, and beliefs evolve in the country's unique context, the Vision 2030.

In previous years, the research had been carried out by the Barrett Values Centre, leveraging their unique methodology. In 2020, Horizon Group was asked to lead on reporting, adding questions to the survey while conserving the Barrett questions.

Research was carried out in the following phases:

Research process

This research carried out extensive desk review of existing values research globally and in the MENA region as a base for designing the research framework.

Sources:

- 30+ research reports analyzed, including Deloitte Millennials Survey, British Council Next Generation Series, Arab Barometer, previous MiSK values research, various Pew Research Centre analyses, Global Values Survey, Study from the Taibah University, Arab Youth Survey by ASDA'A BCW, several ECOSOC Youth Forum reports, etc.
- 10 interviews with leading experts in values research, both in the Gulf Region and internationally.

Main findings:

- Increasing pace of value change among young people globally;
- Widening gap between highly educated and less educated youth;
- Increased focus on skills development;
- Growing youth unemployment correlated with youth unrest globally;
- Multicultural values up to twice as common among under-30s, particularly the youngest.

Implications:

- Expand the Barrett values, adding new values reflecting global trends and results of previous MiSK values research.
- Integrate the Barrett approach with complementary behavioral and opinion questions to clarify the meaning of the values data.
- Add demographics questions to cross-tabulate results as per best practices.

Survey design

Survey design required that the research team mix two different approaches. We ensured cohesiveness of our approach through a five-step process:

Step 1 – Background Research

Two types of review of existing metrics and approaches were carried out: a review of literature and a benchmarking exercise vis-à-vis major, internationally recognized values surveys. A thorough literature review was carried out to identify new values and values measurement approaches, notably in the GCC region. Moreover, eight distinct, globally recognized values measurement methods were analyzed and benchmarked. They are summarized in Annex A.

Main findings: Value analyses are of three types:

- Behavioral: “How often do you” – based on the Valued Living Questionnaire, situational judgement test.
- Opinion: “To what extent do you agree that...” – based on the European/World Values Survey.
- Beliefs-based: Barrett model (derived from the personal values assessment), Schwartz Values survey, Portrait Values Questionnaire, Core Values Index.

Implications: Supplement the beliefs-based Barrett approach with opinion and behavioral questions for richer reporting through cross-tabulations and comparisons.

Gamification approaches were reviewed, and the team concluded that there are very few documented use cases in values survey, and the risks would be higher than the benefits.

Step 2 – Customization of the existing questionnaire

The research team proposed to update the existing values questionnaire, which was based on the methodology by the Barrett Values Centre, as follows:

- Generally, maintaining as many values as possible from previous rounds of research to enable longitudinal comparisons
- Resolving some cases of value overlap from previous questionnaires (e.g., responsibility and accountability)
- Adding new values to personal and national sections of the values approach that:
 - Became relevant considering recent developments
 - Reflect values trends identified in the literature
 - Oppose some of the most frequently recurring negative values in previous rounds of research to ensure completeness

Step 3 – Questionnaire design

The research team designed a set of additional questions to complement the Barrett data collection based on a conceptual framework that was developed to guide the research. It added demographic, behavioral, and opinion questions that matched topical/thematic areas that were identified based on the literature review, on past values reports undertaken by the MiSK Foundation and discussions with the MiSK team. Focus was given to questions that could provide rich, actionable findings when analyzed in the context of demographic data or compared to Barrett data.

Step 4 – External Review

In the process of refining the conceptual framework and questionnaire, the research team carried out various interviews to verify relevance and methodological feasibility.

The research team submitted the questionnaire for review to the following parties:

MiSK Foundation: Conversations led to fine-tuning of some survey items and the decision to deprioritize three questions that did not fit on the questionnaire.

Catherine Clothier, Barret Values Centre: Conversations led to the following:

- Overall validity of the Barrett approach.
- Understanding of how to carry out longitudinal analysis with Barrett data.
- Confirmation of the validity of our approach to amending and substituting some Barrett values.

Tor Eneroth, Barrett Values Centre: Conversations led to the following:

- Confirmation that the supplemental questions developed by the research team enrich the results of the three existing Barrett questions
 - Greater understanding of the extent of cross-tabulations possible with Barrett data. This is likely possible for simple male/female splits but not for more advanced tabulations, unless the sample size is significantly increased.
-

Giulia Casu, Associate Professor of Psychometrics at the University of Bologna: Review of the overall questionnaire led to:

- Overall confirmation of validity of Barrett approach, deemed in line with existing organizational psychology approaches.
- Doubts as to the conceptual comparability of values and behaviors in the Barrett questionnaires, which should not affect measurability, however.
- Validation of all additional demographic, behavioral, and opinion questions, with minor tweaks to wording.

The survey was adjusted based on this feedback.

Step 5 – Usability test

The questionnaire was then submitted to the survey firm Phronesis Partners for a usability review. Phronesis validated the additional demographic, behavioral, and opinion questions and noted that minor changes to wording might be made prior to administration.

Stronger doubts were expressed about the usability of the pre-existing Barrett components shared two weeks prior, which were deemed possibly too complex to be administered online.

Phronesis translated the survey into Arabic. The translation was then reviewed by an Arab-speaking member of the research team.

Survey administration

The survey was administered online to a random representative sample of 1001 Saudis. Fieldwork took place between the October 29th and November 8th, 2020. This occurred after the COVID-19 pandemic's main peak had already passed in Saudi Arabia, but some restrictions were still in place. This certainly facilitated survey completion, as many respondents were confined indoors with fewer activities to keep them busy. The COVID-19 may also have shaped many respondents' views, although it does not appear prominently among respondents' answers.

Analysis and workshops

From the outset, the research team and MiSK were keen that the results be interpreted as rigorously as possible, with special attention to avoiding Western-centric notions and biases. For this purpose, the preliminary survey results were shared with a select group of 15 experts at a dedicated workshop on November 12, 2020.

The stated goal of the workshop was to make sense of the findings of the 2020 survey on the values of Saudi youth. Interpretation of the results was debated and led to a better understanding of the belief system and behaviors of Saudi youth. Participants shed light on the impact of the major social transformations under way in Saudi Arabia as well as the perception of the different elements of Vision 2030 on youth values.

Armed with these valuable insights, the research team proceeded to analyze results further, breaking down survey data by gender, employment status, region, and age brackets. Workshop participants also helped the team to identify and interpret many of the value jumps, cultural entropy scores, and other trends explored in this report.

Sampling

The respondent sample is broken down as follows:

2020 SAUDI VALUES SURVEY SAMPLE - BREAKDOWNS

AGE	18 – 24	196	20%
	25 – 34	260	26%
	35+ Years	545	54%
GENDER	Female	580	58%
	Male	421	42%
EMPLOYMENT	Employed with a non-standard contract	99	10%
	Employed with a standard contract	575	57%
	In full-time education	83	8%
	Not employed – able but not searching for a job	49	5%
	Not employed – not able to search for a job	5	0%
	Not employed – searching for a job	107	11%
	Prefer not to say	23	2%
	Self employed	60	6%
REGION	West	332	33%
	Eastern	153	15%
	South	143	14%
	Central	322	32%
	North	51	5%
TOTAL OF RESPONDENTS		1001	100%

Overall, given the intricacies of assessing values across countries and the cultural specificities in Saudi Arabia, the methodology employed to assess values in the country is still evolving. Results presented in this report should be interpreted with the following caveats:

- The 2020 survey expanded the approach. Whereas previous surveys featured questions developed using the Barrett approach exclusively, the 2020 survey added more traditional attitudinal questions.
- As in 2018, the 2020 survey was distributed online skewing the sample of respondents towards those with stronger educational backgrounds. The 2019 survey was conducted face to face.
- Sample sizes varied significantly by year, as did sample composition by gender, region, and other criteria. As a result, longitudinal comparisons should be considered as indicative only.

Barrett Model and Assessments

The Barrett Model is the breakthrough work of Richard Barrett. Inspired by Abraham Maslow's Hierarchy of Needs and tested over more than two decades of real-world experience with thousands of organizations, the model identifies the seven areas that comprise human motivations. These range from basic survival at one end, to service and concern for future generations at the other.

It provides a proven and extraordinarily useful map for understanding the values of employees, leaders, citizens and stakeholders. Even better, it offers a means for creating more supportive and productive relationships between them, and a deeper alignment of purpose across your organization or nation.

The Values Assessment asks three simple questions.

- Personal Values - Select 10 values and behaviours that most reflect who you are, not who you desire to become
- Current Culture - Select 10 values and behaviours that most reflect how your organisation (or community/nation) currently operates
- Desired - Select 10 values and behaviours that you would desire for your organisation (or community/nation) to achieve its highest potential

The values that people select are mapped against the 7 levels of the Barrett Model to discover deep insights about

- Who the people are in the organisation / nation and what is most important to them deep down.
- How respondents (employees / citizens) are experiencing the current culture. What is working well and what is causing frustration and dysfunction.
- The desires that respondents (employees/citizens) have to ensure their needs are met, to improve organisational / societal outcomes and improve quality of life.

The results provide the foundation for dialogue and action.

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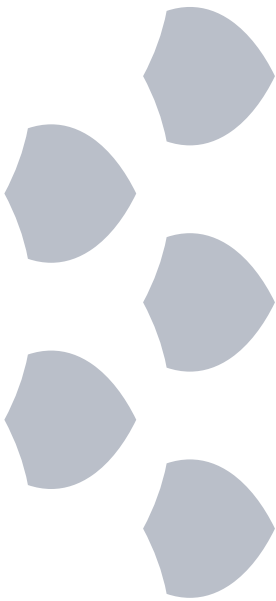
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- Alanoud Alsharekh – Associate fellow, Chatham House
- Alex Awiti – Founder and Director, East Africa Institute, Aga Khan University
- Alison Baily – Senior Adviser, Research and Policy Insight Team, British Council
- Pascal Ménoret – Professor of Modern Middle East Studies, Brandeis University
- James Tognolini – Director, Centre for Educational Measurement and Assessment
- Mark Thompson – Senior Associate fellow, King Faisal Center for Research and Islamic Studies
- Christine Wilson – Director, Next Generation Research Series, British Council

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- Salma Alrashid – Sherpa, W20
- Bader Al-Saif – Non-resident fellow, Carnegie Middle East Center
- Alison Baily – Senior Adviser, Research and Policy Insight Team, British Council
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مؤسسة محمد بن سلمان الخيرية
Mohammed bin Salman Foundation
مسك الخيرية misR foundation



مسك القيم