



## Tradition and Transformation: Change across generations, A Saudi Arabian perspective

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# Generational differences in a changing society

## Attitudes and behaviour

Over the last decade Saudi Arabia has continued to experience unique, ongoing, and impactful social change across its entire population.

This paper provides an overview and insight on attitudes and behaviour across the generations. Where globally there is an abundant body of generational research, many studies remain Western centric. In the Middle East regional studies often 'average out', with economic, cultural and social change differing greatly per country or are too marketing focused.

Recognizing the gap and the need to have a clear Saudi Arabian focused study, this presentation sets out to assess and to summarise the following:

- Highlight **continua** across the generations
- Explore **differences** and coherence comparing between generations and gender
- **Compare**, where possible with selected global findings, leveraging ...
- Addressing **attitudes and behaviours** covering ..
- Family, work, leadership, health, finance, life priorities, and self-description

Utilising a closed segmentation across generations: Baby Boomers, X, Y and Z.



# Context


## Unique and increasing change in societal dynamics since 2016


**33 million** Population, declining growth rate 3.3%. Urbanisation 82%


**67%** Below the age of 35


**35%** Female workforce participation, up from 19% in 2016

**\$1 trillion** GDP, ranking 19th globally

 Diversification: 50% Non-oil revenues, up from 42%  
Tourism, entertainment, fintech, and renewable energy

 Women empowerment: Driving, removing restrictions,  
increasing representation

 Cinemas, concerts, festivals, sports

 Youth unemployment and skills match, balancing tradition and  
modernization, climate change



### Fourth WAPOR paper in a series:

- WAPOR 2022: Impact of polling, longitudinal indicators
- WAPOR 2023: Deep dive into perceptual differences within the KSA
- WAPOR 2024: Relationship between importance, knowledge and performance of societal factors

# Data collection Parameters

## Random Probability Sample



CATI, September 2024



General Population, 18+ covering 97%



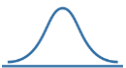
Sample size :1653



Length of interview: 12:22 (minutes)

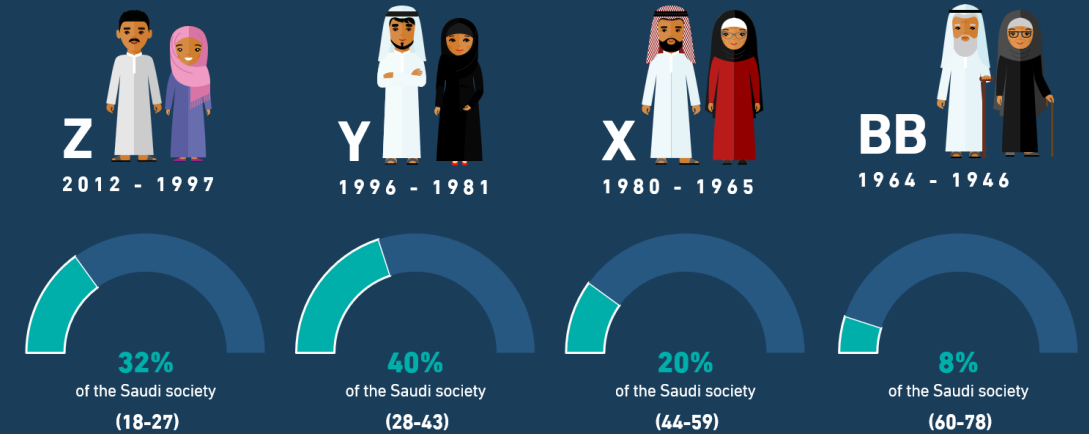


Response rate 26%



Error margin 2% on 95% confidence level

## The generations within the Saudi population



## Secondary data and desk research:

1. Gallup Report Generations, WIN
2. INSEAD et al. (n.d.). Building leaders for the next decade: How to support the workplace goals of Gen X, Gen Y and Gen [Generations Series].
3. Payments & Sixth Factor. (n.d.). Understanding Gen Z in KSA. Sponsored by Amazon Payment Services.
4. IPSOS. (2018, September). MENA's Millennials Decoded: A Glimpse Into MENA's Most Disruptive Generation.

# Continua across generations

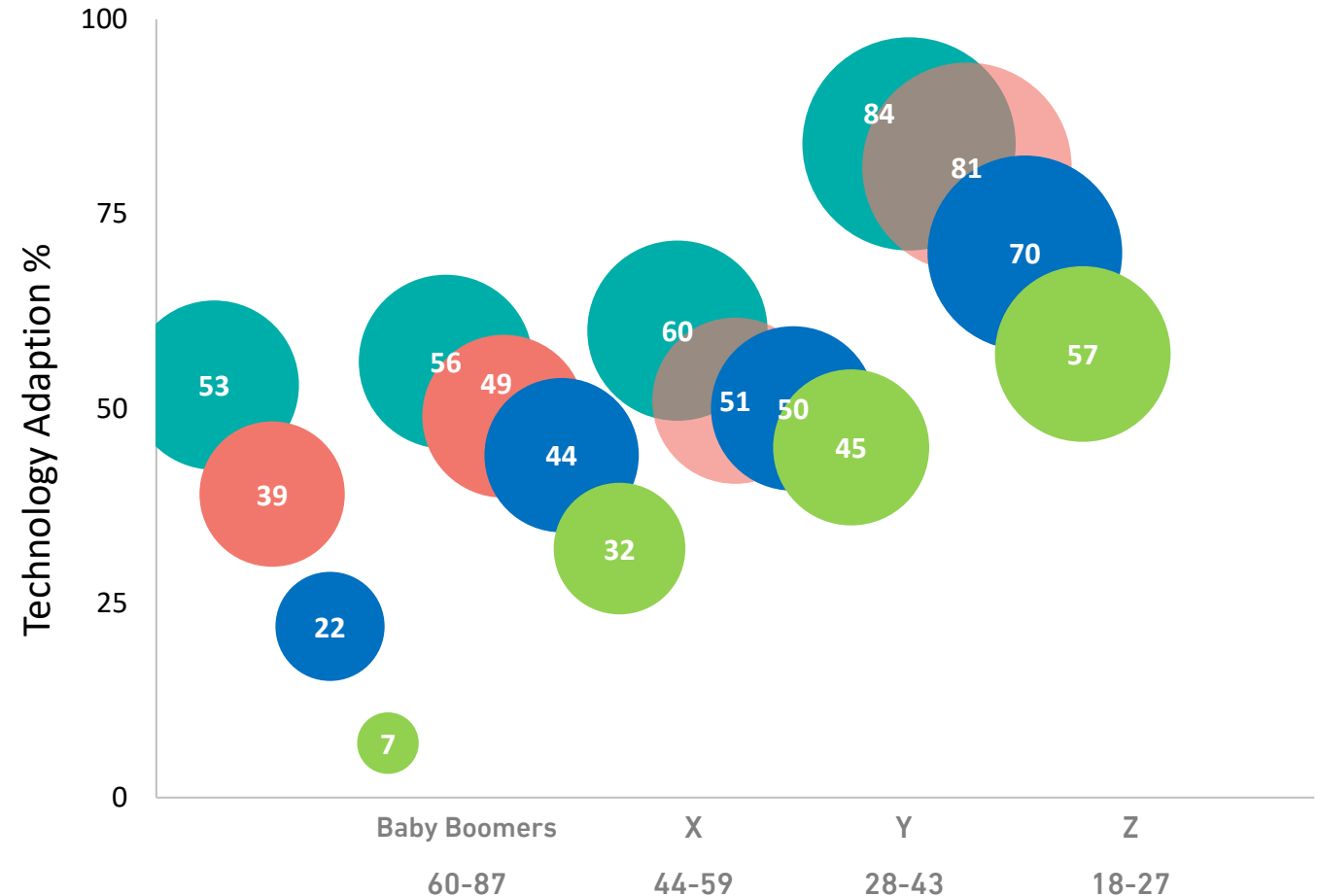
In this sections highlights a series of selected generational continua, providing insight across:

- Digital engagement
- Preference of communication
- Life's priorities
- Family
- Health
- Work, finance, women and leadership

Where possible comparisons with international benchmarks are made.

## Digital Engagement

● Electronic Government ● Social Media Sharing ● Contacting Friends and Family ● Shopping Online



Clear engagement continua across E-Government, Sharing on social media and communication preference with family and friends

# Personal Communication Preferences

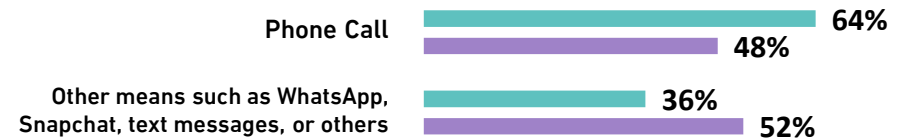
Communication Preferences with Friends and family Across Generations veer to increased digital usage as age lowers. This in particular being true for Females, preferring digital text significantly more than their male counterparts.



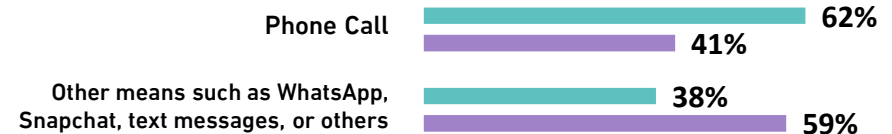
**BB**  
60-78



**X**  
44-59



**Y**  
28-43



**Z**  
18-27

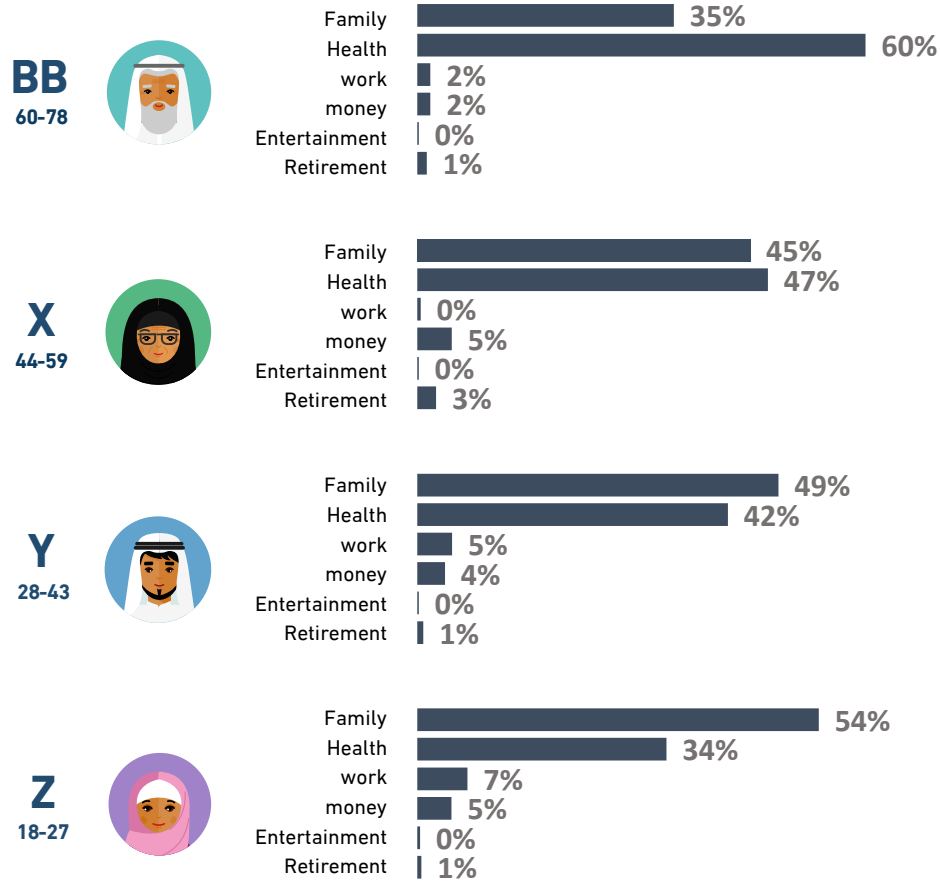


When using your mobile phone to communicate with family or friends, do you prefer using:

● Males  
● Females

# Life's priorities, logical continua

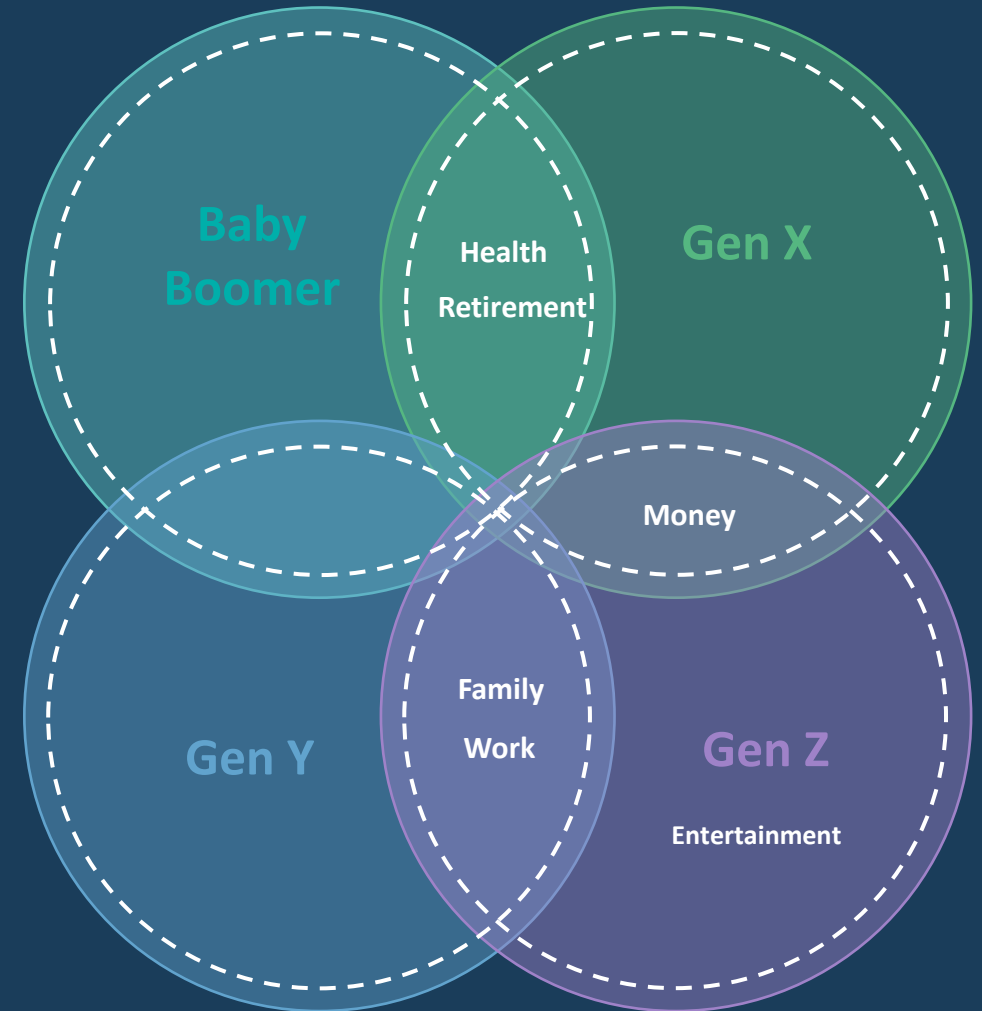
Family remains top priority with health featuring strongly for baby boomers



Which of these topics do you think is the most important in your life?

Life priorities for Saudi Generations

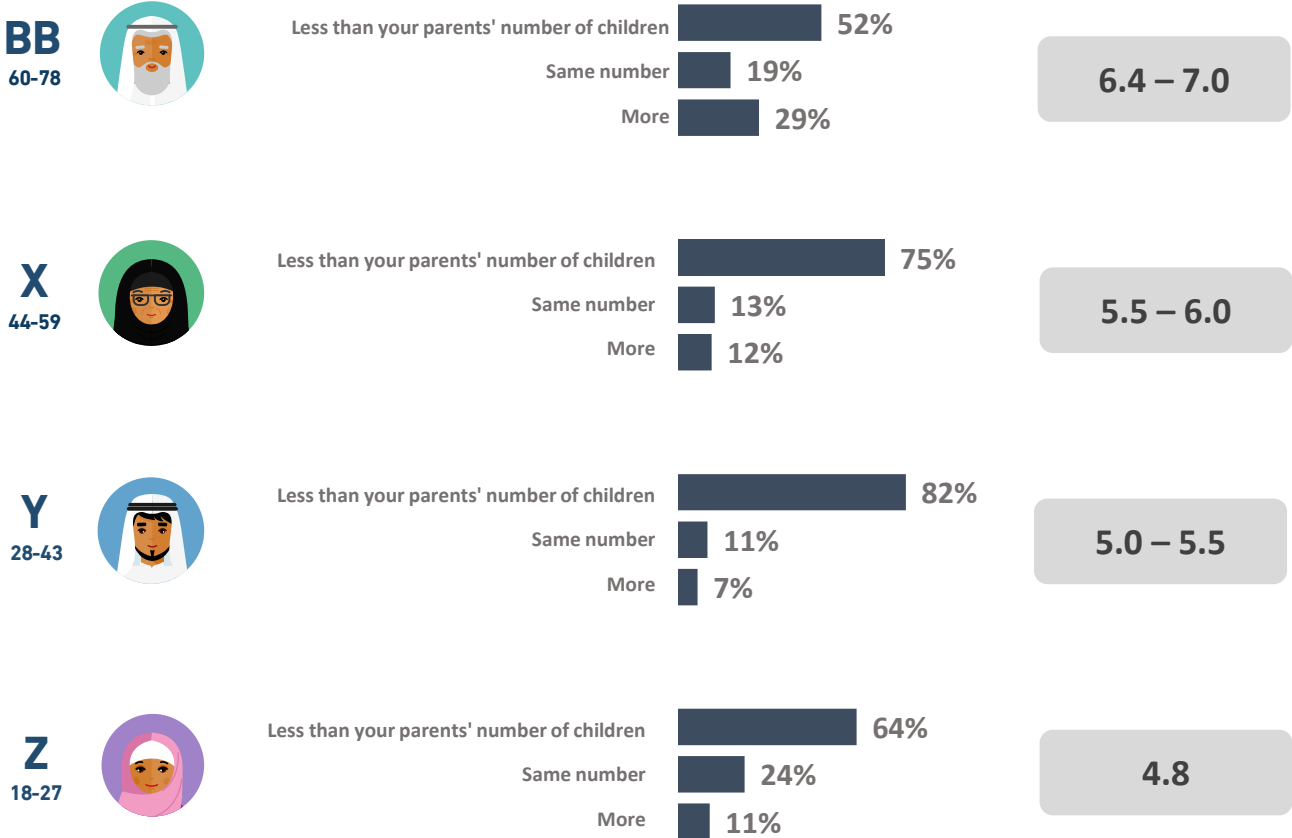
# Overlap between Generations



Priorities by Preferred Topic: Results from Single-Choice Importance Survey"

# Whilst marriage and children remains a priority

Generation are trending to smaller family sizes



Do you think your number of children will be?

Females consistently preferring smaller families than males across all generations

M	F	% Smaller families
47	58	BB
68	81	X
77	87	Y
55	73	Z

SCOP Study 2024: Average Saudi Household Size : 5  
 Mean=5.5/ Median =5 G-Stat: 4.8, G-Stat 2022

# Health: Surprisingly Baby Boomers self-assess themselves rather optimistically

Optimism among baby boomers versus 'bad habits' among younger generations?

Percentage of respondents who reported being very healthy or healthy

76%	67%	79%	76%	58%	87%	BB
68%	73%	85%	82%	68%	86%	X
72%	80%	87%	86%	81%	85%	Y
71%	81%	88%	91%	83%	82%	Z

North & South America

Europe

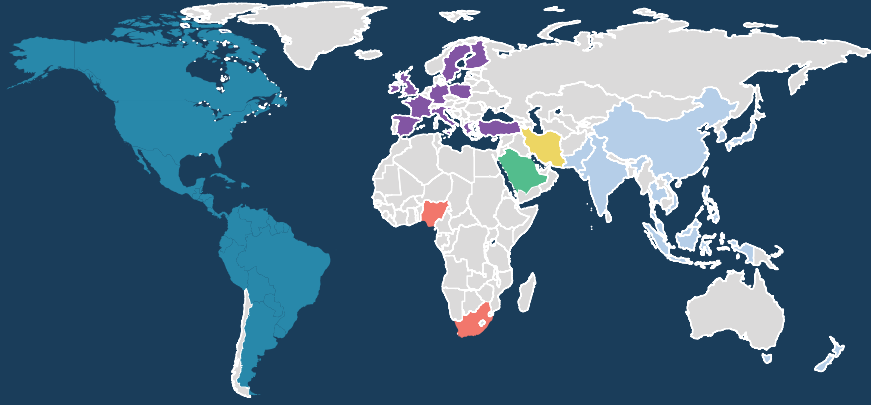
Africa

Asia-Pacific

Middle East

Kingdom of Saudi Arabia

Reference: Gallup Report\_Generations\_WIN



- BB= Males :exercising (33%) Females: Getting regular medical check-ups (27%)
- Life expectancy of Age in KSA:78 years\*
- 1 out 3 Saudis have take-aways daily

How would you rate your overall health?

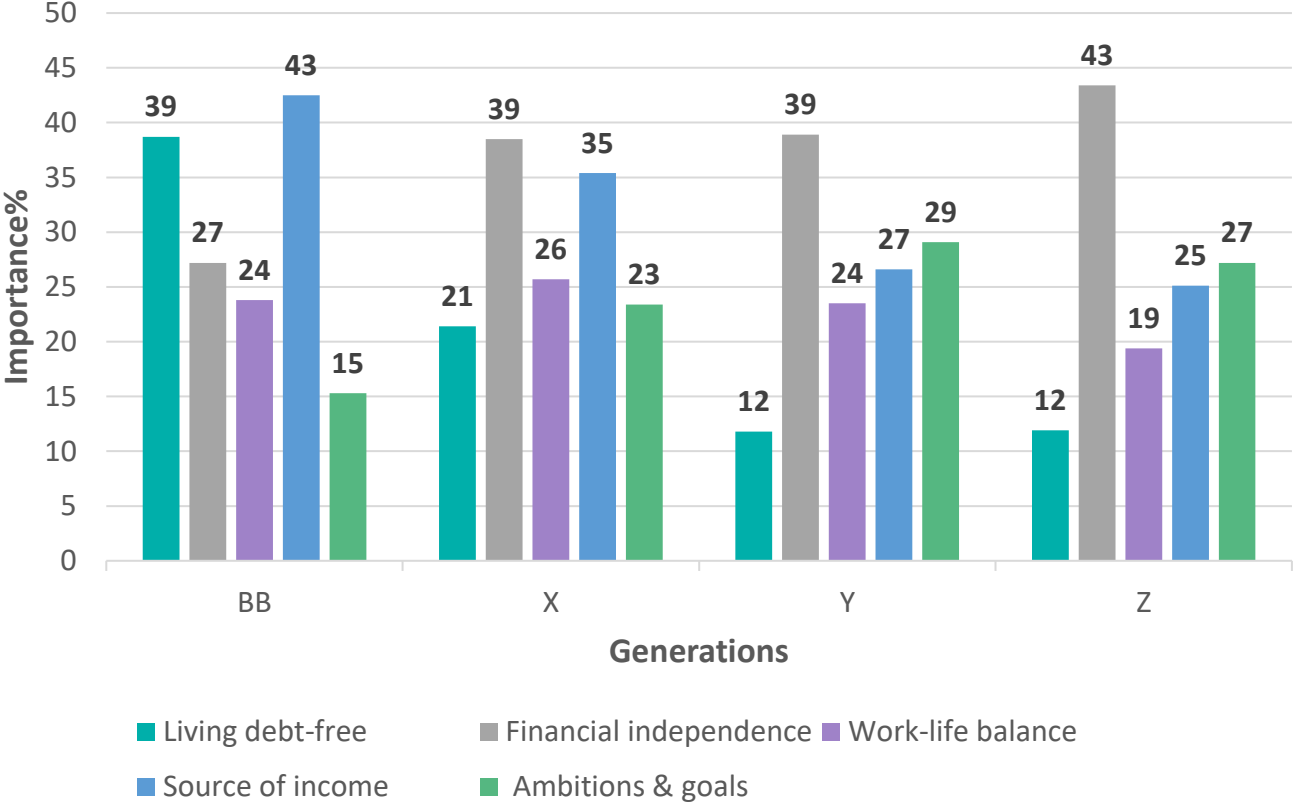
In a comparison between KSA generations and global countries: The older generations X and BB (44-78 years) view themselves as healthier.

\*Gestate 2024

# Work values females: Debt-free, financial independence, and achieving ambitions

Work-life priorities inline with international picture

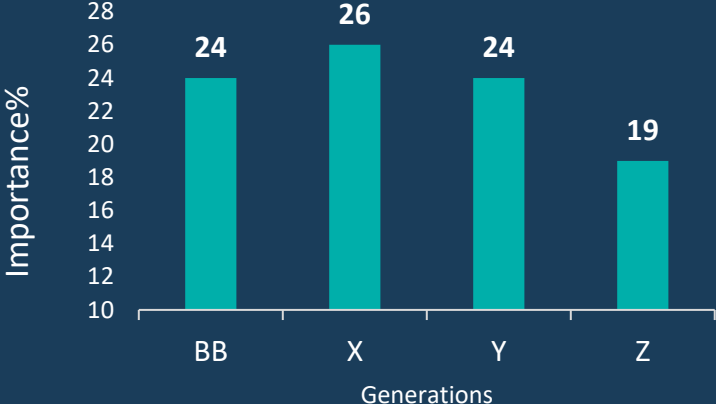
Woman preferences in work



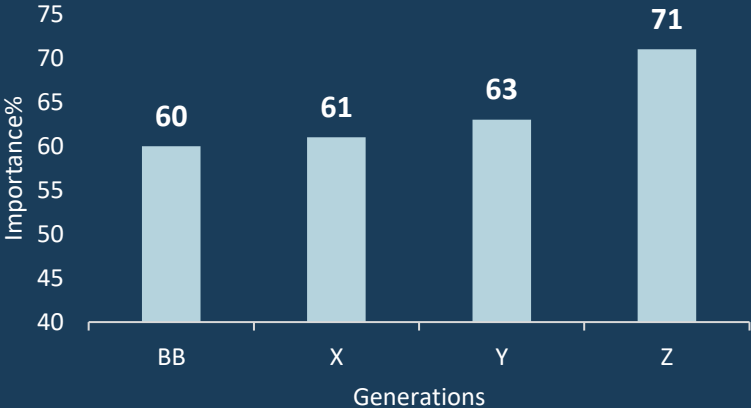
## Work-life balance peaks with X

Leadership ambition declines with age

Workforce Balance



Leadership importance in career path







# Conclusions

- **Generational perspective reflecting on Saudi Arabia's journey, tradition & transformation.**
  - **Key Points Summary**
    - Expected: Most continua, family & children, life's and work priorities, family size
    - Unexpected: Female communication preferences, health self-assessment
    - Female Leadership
    - Overall Optimism: 'Striving across, X and Y 'caught in the middle'
  - **Per Generation**
    - BB: Kind and authentic, relatively tech savvy, focusing on health, debt-free
    - X: Kind and strivers, work-life, balance, money matters
    - Y: Striver and amazing, smaller family size, technology
    - Z: Amazing and ambitious, leadership, technology, entertainment
  - **International Comparison**
    - In-line: Most continua
    - Not in-line: Communication preferences, Health, family & children importance
  - Watch-outs are clear, balancing family and ambition, what about Generation Alpha?
- 



**Thank You**