



Social impact of **COVID-19 on Saudi Arabia**

A survey of Saudi Arabian thought leaders and decision makers on the medium-term impact of COVID-19 on Saudi society and how these changing dynamics can be leveraged to accelerate positive, enduring change



مجموعة الأغر
AL-AGHAR GROUP

KEARNEY
National Transformations Institute

بسم الله الرحمن الرحيم

In Allah we trust and to whom we revert,

The human factor has always been at the center of Al Aghar Group's focus and its methodology. We strongly believe that Saudi citizens are the most valuable source of insights for our studies and research projects. Considering the potential challenges facing the Kingdom of Saudi Arabia as a result of the COVID-19 pandemic, we commissioned this report based on an in-depth survey revolving around the social impact of the pandemic on Saudi society in partnership with Kearney and its National Transformations Institute, which played a key role in surveying participants, analyzing the gathered results and proposing recommendations to help us emerge stronger from this crisis.

We are hopeful that the strategic imperatives outlined in this report will add value to policy discussions, raise citizens' awareness, and serve the greater good of the Kingdom. The recommendations illustrate that the government, private sector and individual citizens must stand together to accelerate the positive change the crisis has sparked, sustain the foundational aspects of our social lives and ensure our preparedness for possible future crises.

On behalf of Al Aghar Group, I would like to thank our colleagues who have participated and contributed their time and effort to complete and publish this report despite the challenges imposed by the COVID-19 pandemic. I would also like to thank Kearney for their invaluable contributions to this paper.

Thank you.

On behalf of Al Aghar Group

Faisal bin Abdullah bin Mohammed Al Saud

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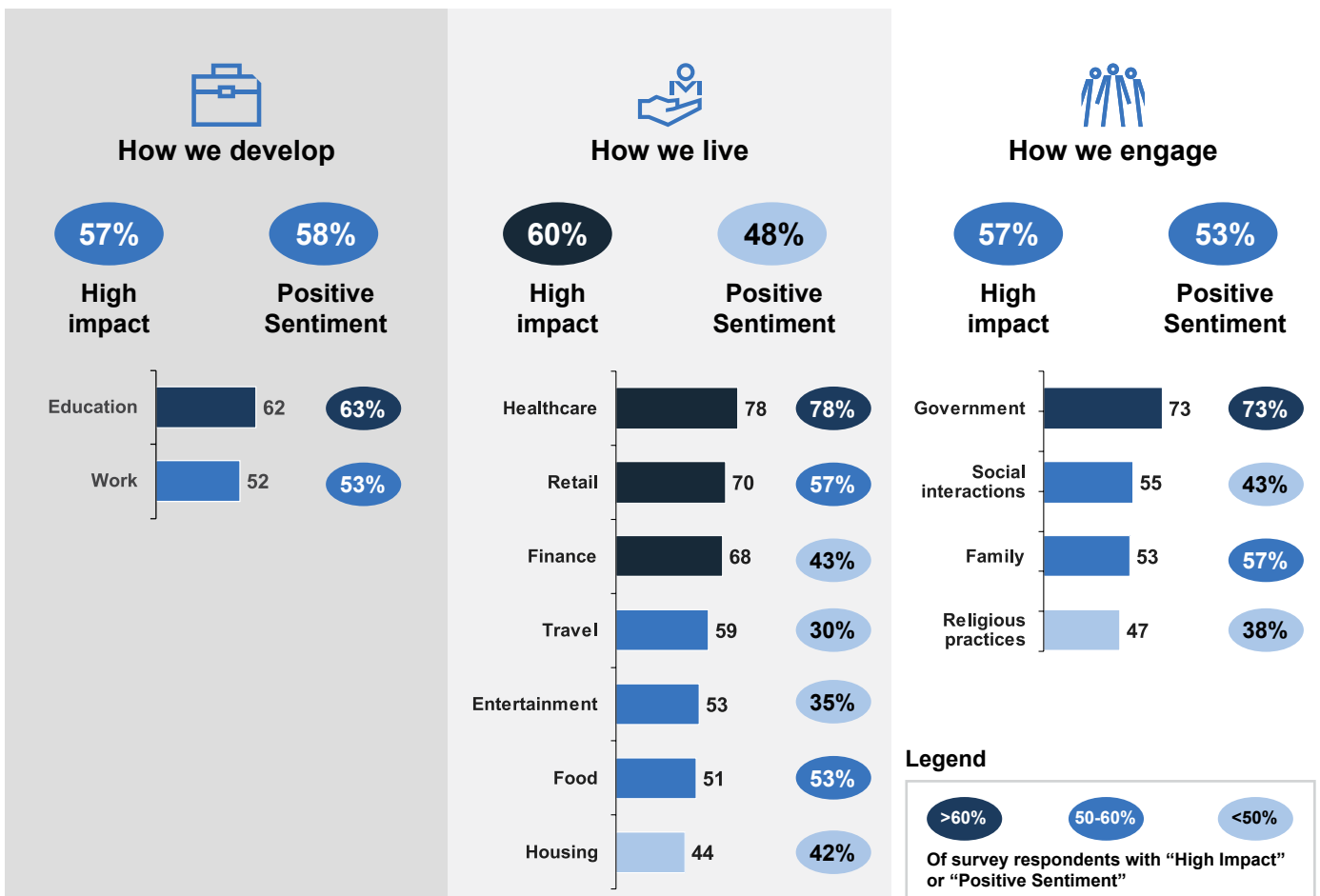
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Executive Summary

Saudi Arabia has a proud history of resilience. The Kingdom has thrived in the context of challenging environmental conditions, in one of the most geopolitically complex regions in the world, and at the very center of global energy markets. As in all countries, the COVID-19 crisis is once again severely testing the adaptive capacity of the Kingdom. While the pandemic represents a historic health threat and unprecedented economic challenge, it also is having profound although less discussed social impact. It is on these aspects of COVID-19’s repercussions that our survey of Saudi Arabian thought leaders focused. In particular, the survey explored three dimensions of social impact: how we develop; how we live; and, how we engage.

In each of these areas, the survey shed light on a wide range of challenges and opportunities that the pandemic is generating. However, looking across these dimensions and their components, what emerges most clearly from the study is the deep, optimistic resilience of the Saudi people and their implicit commitment to the Kingdom’s national transformation. Despite the near-term hardships caused by the crisis, respondents anticipate that the most significant medium-term impacts will be positive. The data makes clear that this is not a case of wishful thinking. Instead, the results reflect what appears to be the fundamental assessment that COVID-19 will accelerate necessary progress in the areas that it is most directly affecting, including those where its impact has been most disruptive: healthcare, government and education. In designing the survey, we did not anticipate that this remarkably affirmative mindset with respect to disruptive change would emerge so clearly. It is most visible within each dimension of the analysis.

Figure 1
Overall survey responses



How we develop

This dimension of social impact focuses on how we work and learn. At the intersection of these areas is the emergence of the deeply disruptive ‘future of work’. The findings make it clear that respondents believe that COVID-19 is accelerating this historic shift and view this acceleration as beneficial for the Kingdom as we approach 2025. In particular, respondents see as fundamentally positive both the disruptions of increased participation in the platform-enabled gig economy (66%) and the need for the re-training of employees to adapt to the new normal (69%). The survey also revealed some concerns regarding the relative security of formal employment and self-employment, with 37% seeing the effect of the crisis as negative. However, there are clear indications of confidence that new, innovative, and inclusive modes of learning will make the needed adaptation possible.

Survey respondents expect education in the Kingdom to undergo a fundamental and positive change as a result of this crisis. Specifically, there is an expectation that COVID-19 will have a significant impact on the use of the technologies, resources and digital content necessary to ensure inclusive education, the prevalence of virtual/online education, and a moderate impact on the types of skills prioritized for development in schools and universities. More than 70% of respondents expect the anticipated changes in these areas to result in an improved educational landscape in the Kingdom in 2025. Thus, the survey makes it clear that respondents view the dramatic pandemic-driven changes in how we work and learn as powerful triggers for necessary, positive change despite the disruptive adaptation they require.

How we live

This dimension focuses on the anticipated effects of the pandemic on the most tangible, daily aspects of our lives – from food, shopping, entertainment and travel, to health systems, personal finance and housing. It is here that respondents anticipate the most significant impact from COVID-19. They also view the implications of the crisis in this area with the widest range of sentiment.

On one hand, 78% see the impact of the pandemic on healthcare to be beneficial for the Kingdom. In particular, they see as positive both the anticipated shift in national consciousness regarding the importance of health and wellbeing (86%), and the changing investment in preventative public health (81%). In finance, the vast majority of respondents expect a beneficial impact in 2025 from both the changing acceptance of cashless payments for face-to-face transactions (89%) and the increasing prevalence of e-commerce and online shopping (75%). In all of these cases, once again, the Saudi thought leaders and decision-makers we surveyed see the COVID-19 crisis as a spur for needed and positive change – an accelerant of the transformation already underway in the Kingdom.

On the other hand, while the medium-term impact on travel and entertainment is expected to be modest, the impact is viewed relatively negatively, with only 30% and 35% positive sentiment respectively. In particular, 40% of respondents anticipate that the effect of the pandemic on the use of public transportation will be negative. This is not surprising given the Kingdom’s significant investment in infrastructure to facilitate inclusive participation in the economy – and reduce traffic congestion. Our respondents also see the expected impact on citizen spending as negative (41%), which is also not surprising given the growth imperative. In these cases, there is no clear transformative opportunity in the anticipated disruption, making the negative sentiment understandable. For this reason, the case for government intervention in these areas is particularly strong.

How we engage

This dimension centers on expected changes in the interactions we have with others – family, friends, neighbors, strangers – including through religious activities and government institutions. How we engage is thus at the very center of the social, relational impact of COVID-19 on the Kingdom. The results once again indicate the strong expectation that the pandemic will prove to be a constructive catalyst for necessary change in the medium-term. By 2025, 78% of respondents expect that COVID-19 will lead to a significant and very welcome (83%) step change in government preparedness for future crises. In addition, 68% of respondents anticipate a significant impact on government information sharing and 75% look forward to this increased

transparency. These high expectations regarding the future performance of the government are expected to be balanced by a strengthened readiness to contribute, as 65% anticipate a moderate, but positive change in the willingness of citizens to contribute towards government efforts. These results thus suggest solidarity and an openness to participate actively in the evolving social contract.

At the same time, although the anticipated impact of the pandemic on select aspects of Saudi culture is lower, it is also less positive. 39% of respondents see the effect on the Kingdom's 'gathering culture' as negative in the medium term and 35% expressed negative sentiment with respect to the impact of the pandemic on the prevalence of Saudi Arabia's communal traditions. These anticipated potential negative effects of the crisis represent opportunities for proactive and innovative action to prevent the erosion of what are clearly core elements of Saudi Arabian society.

From insight to action

Looking across these three dimensions, this study suggests that the commitment of the Saudi Arabian people to the transformation already underway in the Kingdom is resolute even in the face of very real and acknowledged disruption and near-term hardship. What could be viewed as obstacles or threats are consistently viewed by respondents as opportunities for accelerating forward progress. Harnessing this spirit, meeting rising citizen expectations, and addressing those issues for which a positive path forward is less clear all will require concerted action by government, the private sector and individual citizens. To help orient that action, we propose nine key imperatives in three broad categories as follows.

Accelerate

First, this study strongly indicates that Saudi citizens perceive the COVID-19 crisis as a spark that will ignite even more rapid progress in areas of change on which the Kingdom is already focused. To harness the power of this optimism and meet the high expectations implicit within it, it imperative that action be taken to accelerate progress in a number of areas already in the midst of transformation, including advancing digital inclusivity, preparing the workforce for the future of work, and reinforcing the transformation of Saudi healthcare.

Sustain

The survey also revealed a number of areas in which COVID-19 is perceived to challenge both traditional aspects of Saudi culture, such as communal gathering, and emerging and deeply valued aspects of Saudi life that have thrived in the transformation, but are at risk by virtue of the pandemic, such as entertainment and tourism. To mitigate these negative potential impacts of the crisis, it is imperative that action be taken to sustain key characteristics of Saudi life, including by enabling low-risk communal engagement, encouraging the growth of local production to drive inclusive economic growth and strategic independence, and innovatively adapting the implementation of key entertainment, local content creation, and tourism initiatives in ways that can enable their benefits to be enjoyed even if the crisis persists longer than expected.

Secure

Finally, while the pandemic has generated unexpected opportunities, it has also revealed new threats and vulnerabilities. To address these issues, it is imperative that action be taken to secure key points of vulnerability and reinvest in resilience, including by advancing safety within urban settlements, implementing advanced border systems that can enable the seamless flow of goods, services and people while ensuring security, and driving new forms of international partnership through which resilience can be strengthened collaboratively.

Taken together, these strategic imperatives – although only a small portion of the work already underway in the Kingdom – represent a high-level approach to maximizing the Kingdom's ability to harness the current crisis to accelerate its historic transformation, while preserving its culture and ensuring its security. Meeting these imperatives cannot be the responsibility of government alone. It requires a whole-of-nation effort including the private sector, civil society and individual citizens all taking positive action in concert. It is our hope that as the Kingdom emerges from the present crisis, this report will shed useful light on the social landscape within which this action can be most effectively taken.

1. Context: The intersection of transformation and crisis

This report presents the results of our bespoke survey of Saudi thought leaders and decision makers on the societal implications of the COVID-19 pandemic for the Kingdom through 2025. The analysis reveals the diversity and depth of the social impacts in terms of the lives of Saudi citizens. It also outlines areas in which the crisis and its aftermath present new opportunities to accelerate the transformative change already underway in the Kingdom.

A sudden and unprecedented change ...

The COVID-19 pandemic and subsequent containment measures have led to extraordinary changes in the Saudi Arabian way of life.

Four months ago, the term “social distancing” was virtually unknown. Now, well over a third of the world’s population¹ has been under some form of lockdown. Millions of people have been directly impacted by the novel coronavirus, and among them many have endured profound loss. For extended periods, billions of people have been unable to see their friends and family face-to-face as regular daily activities outside of the home ground to a halt.

The crisis has also had deeply disruptive implications for individuals. At the peak of restrictions, the International Labour Organization estimated that four out of five workers² lived in countries with workplace closures. As a result, millions of people globally and in the Middle East shifted to work from home arrangements – if that was an option. For many workers, unfortunately, it was not. In more severely affected industries, there has been unprecedented income and job loss. The crisis has also deeply disrupted the lives of students. UNESCO estimates that nine out of ten enrolled learners³ were at home and not attending school. Taken together, these historic circumstances have placed new forms of intense pressure on societies.

Deep uncertainty has led to widespread stockpiling of a broad range of goods, creating challenging surges of demand and price volatility. Online retail has seen a marked increase as people avoid entering physical stores. Health concerns have led to the sealing-off of many public spaces and closed the Two Holy Mosques to worshippers. In many countries, sports leagues have been temporarily shuttered, while international events, such as the Olympic Games, have been postponed. To grasp the scale of disruption, consider that 40% of people worldwide⁴ live in countries that have essentially closed their borders due to travel restrictions.

This historic crisis and the changes it has wrought are now all too visible in most countries, but how much of this change will endure beyond the immediate crisis? More importantly, how can the Kingdom respond to this crisis in ways that will allow us not just to sustain, but also to accelerate progress in our historic journey of transformation?

... with uniquely global impact

The deep and lasting economic impact of the COVID-19 pandemic is increasingly clear. In June 2020, the International Monetary Fund (IMF) predicts a global economic contraction of 4.9%⁵ and in Saudi Arabia a decline in GDP of 6.8%.

While the economic fallout of the crisis is of vast scope and significance, its social and psychological effects will also be profound. It will drive significant changes in our way of life, transporting us into the future in a range of ways much more rapidly than we had anticipated. We are witnessing the accelerated advent

Driven by the resumption of economic activity, and supported by policy, Saudi Arabia’s GDP is projected to grow by 3.1% in 2021⁵

¹ According to an AFP database in which the compulsory or recommended confinements were collated globally on April 2, 2020 – widely reported across global media, including by EuroNews and The Daily Mail

² “ILO Monitor: COVID 19 and the world of work”, International Labour Organization. Third edition, April 29, 2020.

³ Figures correspond to learners at pre-primary, primary, secondary, and tertiary education levels. “Global monitoring of school closures caused by COVID-19”, UNESCO, Peaking on April 5, 2020.

⁴ “More than nine-in-ten people worldwide live in countries with travel restrictions amid COVID-19”, Pew Research Center, April 1, 2020.

⁵ “World Economic Outlook, June 2020: A Crisis Like No Other, An Uncertain Recovery”, IMF, June 2020.

of the digital economy, rapid workplace adaption, and a renewed focus in many countries on enhancing domestic production capabilities as supply chain resilience of critical goods becomes a strategic priority once again.

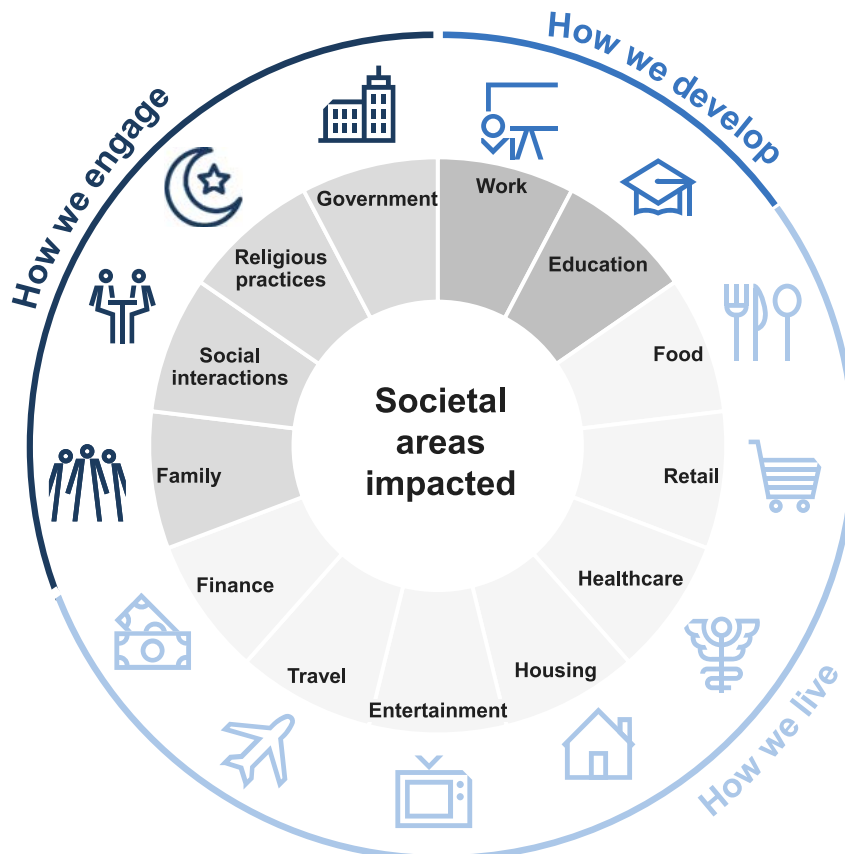
The purpose of this study is to explore the social impact of the virus and how it may change the way people live in the future. How will the closures of public spaces, enforced physical distancing, extended periods of homestay, and increasing awareness of health concerns prevalent during this crisis impact social norms, preferences, and practices in the medium-term? This is the guiding question of the analysis. This report aims to provide a set of recommendations to accelerate positive change, sustain valued ways of life, and secure Saudi Arabia against future challenges.

Framing the social impact of COVID-19

Even more than we realize, human beings are deeply and inherently social. Complex patterns of social relationships, networks and interactions play a central role in determining our wellbeing. For that reason, the impact of the pandemic on our patterns of daily activity and interaction constituted a central focus of this survey. The survey focused on the medium-term impact in order to minimize focus on transitory, short-term effects while not looking so far into the future as to be beyond meaningful estimation by respondents. To anticipate the potential social impacts of the COVID-19 pandemic on Saudi Arabia in 2025, we took a micro-sociological approach: viewing societal impact as the sum of its parts. Society can be broken down into three overarching pillars, comprising elements of daily life:

- **How we develop.** The ways in which we earn a living, the skills we need, and how we perform our work. The educational institutes we choose, and the methods we use to gain knowledge and skills.
- **How we live.** The more tangible aspects of our lives. The food we eat, things we buy, health systems we use, homes we live in, entertainment we prefer, trips we take, personal finance decisions we make.
- **How we engage.** The interactions we have with others – family, friends, neighbors, strangers. The religious activities we take part in. The expectations we have of our governments.

Figure 2
The COVID-19 pandemic will have an impact on each element of our daily lives



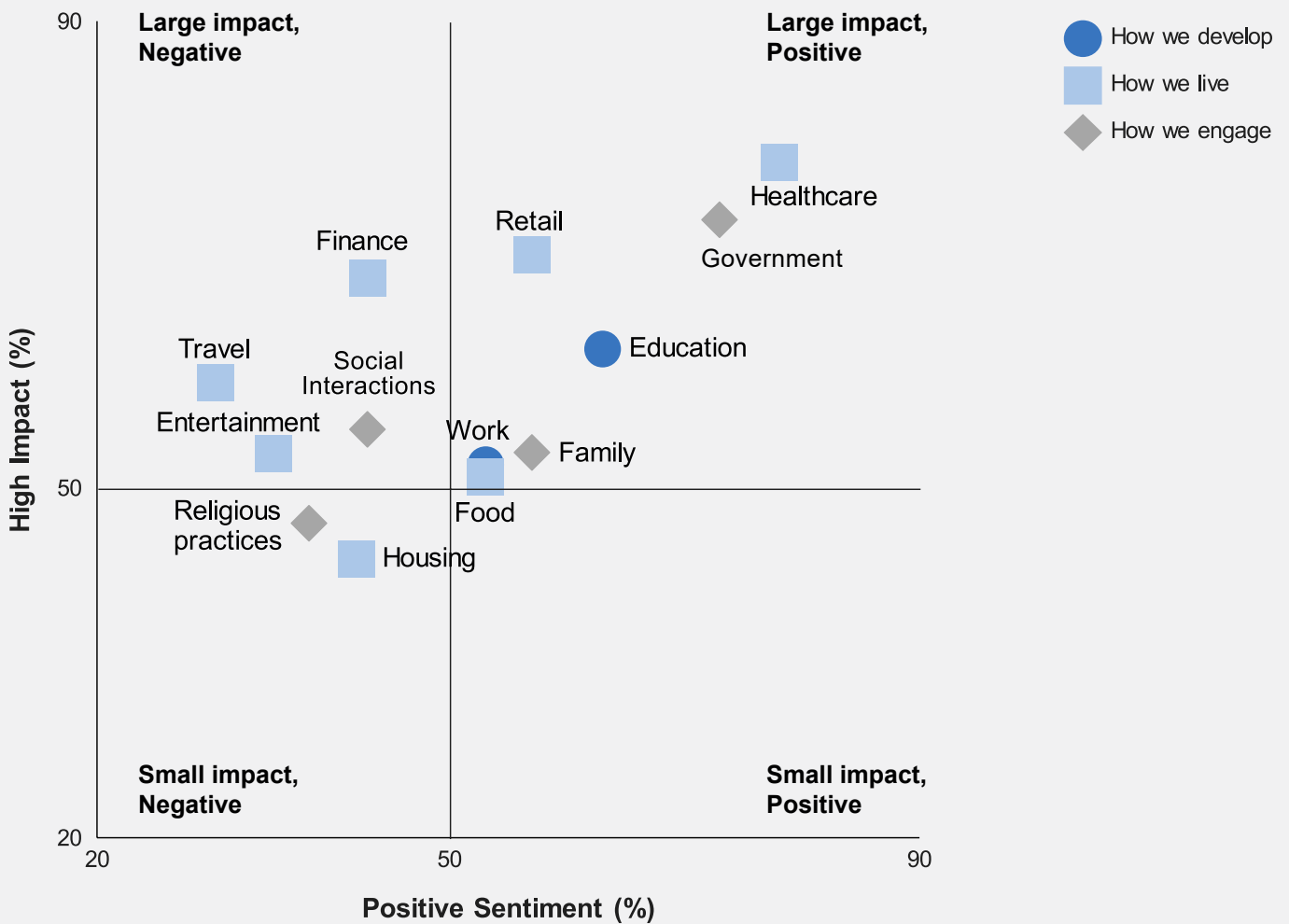
2. Saudi Arabia at a critical juncture

While the pandemic is creating extraordinarily difficult circumstances, our survey revealed significant optimism and high expectations that the crisis can be harnessed to drive positive change.

Accelerated change

The pandemic continues to act as a catalyst of global, regional, and national change. While the immediate pandemic is traumatic in terms of health and economic loss, the survey results indicate a nuanced understanding of the transformative potential of this moment in myriad areas of life. Our results reveal a nation that has entered a critical juncture in which current choices will have long-term consequences. Respondents have a decidedly positive view of the accelerated change the Kingdom is facing, particularly with respect to healthcare, government, and education. There are also pandemic-driven changes that are perceived as likely to prove negative, for example the disruption of personal finance, travel, entertainment, and social interactions. However, even these areas of negative sentiment reveal opportunities for the Kingdom and provide alternate ways for people to engage in these aspects of life as we enter the “new normal.”

Figure 3
Overall survey responses



How we develop

“How we develop” refers to the ways in which we work and learn – two of the areas of our lives that have been most deeply impacted by the pandemic. Survey questions in this area explored how we earn a living and how we perform our work, as well as the changing skills we will need, the educational institutes we choose, and the methods we use to gain knowledge and skills. Our survey respondents rated this pillar tied with the second highest medium-term impact (57% of respondents) and the highest-level of positive sentiment (58% of respondents). Within “how we develop”, Education was a standout, as 62% of our survey respondents rated a high medium-term impact, with an equally high-level of positive sentiment (63%).

Figure 4
Overall impact and sentiment for “how we develop”

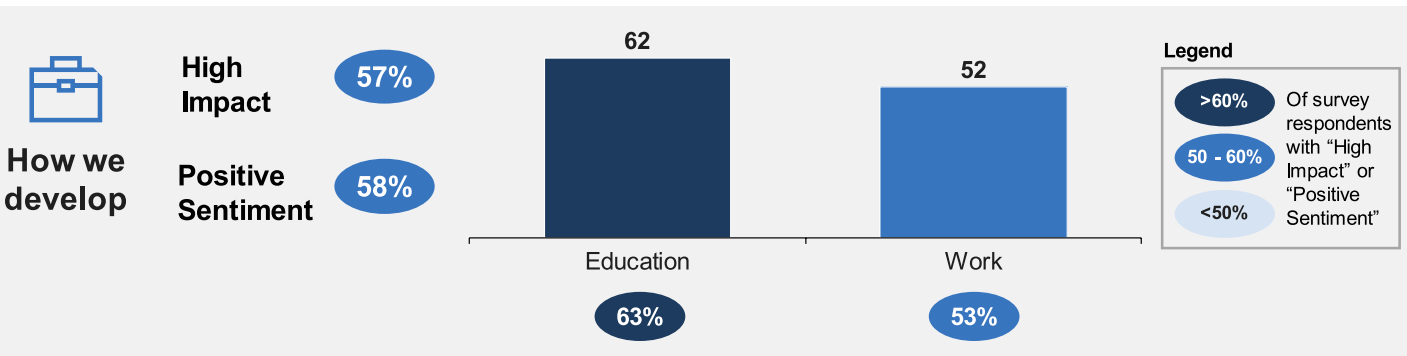
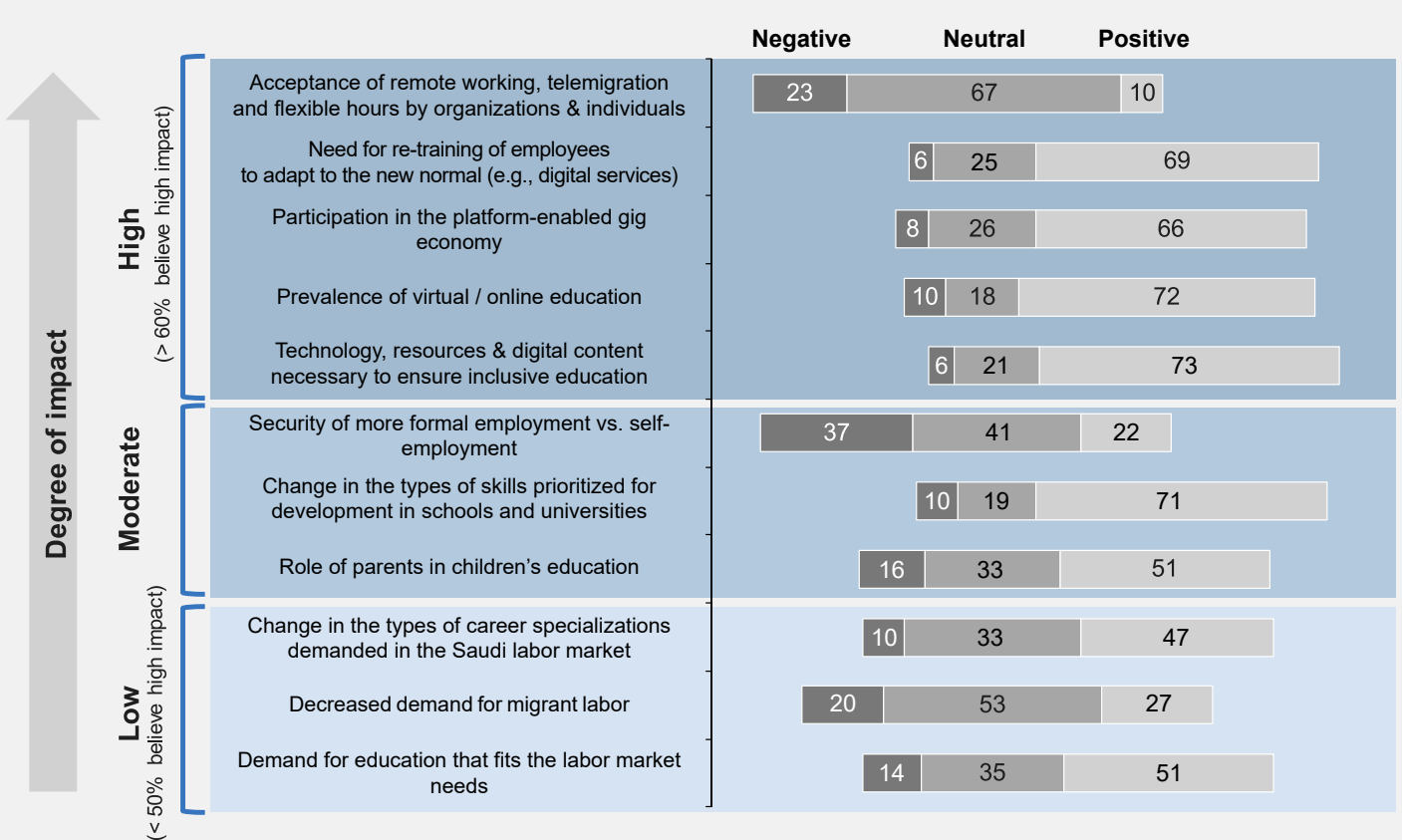


Figure 5
The perceived degree of impact on elements relating to “how we develop”



Learning in the “new normal”

For extended periods during the crisis, as many as 1.5 billion learners globally across all educational levels were not attending their educational institutes⁶. It is these exceptional circumstances, and the desire to limit the negative impact the virus may have on education in the Kingdom, that led the Saudi Ministry of Education to adjust to a brief period of virtual learning, end the school year early, and promote all learners in public education to the next grade without examinations. There will undoubtedly be short-term implications for education, but our survey sought to determine what the medium-term impacts might be.

Even before the pandemic, the global online education market was forecast to reach US\$ 350 bn by 2025⁷

Virtual learning

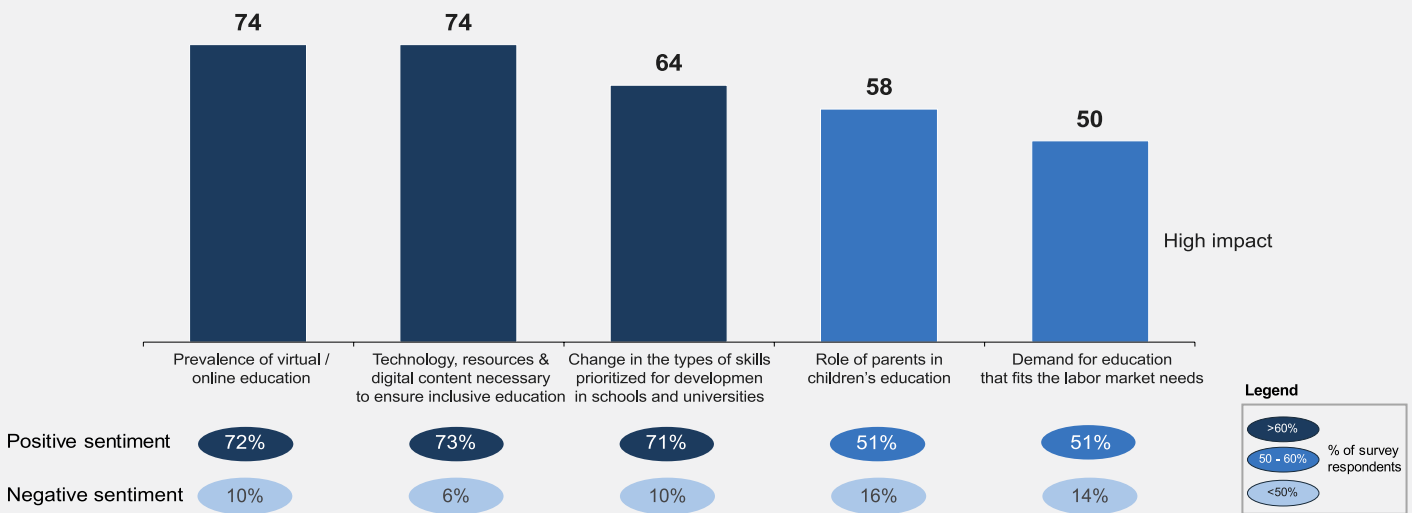
The survey results make it clear that the adoption of online learning and integration of information technology in education is expected to continue in the post-pandemic period. Nearly three-quarters of respondents anticipate an increased prevalence of online education offerings, including growing accessibility of digital content and technology that will support inclusiveness in education. This is most likely to occur in tertiary education institutes as students typically demonstrate more robust independent learning skills as well as the maturity required to achieve successful outcomes through virtual education channels. There is also an opportunity for future “blended learning” models in lower levels of education, particularly where online resources support the achievement of specific learning goals.

74% of our survey respondents anticipate an increasing prevalence of online education

At the same time, virtual education can also be effectively applied at primary and secondary levels. There are now a growing number of cases in which primary and secondary schools have shifted successfully to virtual classes and online learning platforms during the COVID-19 school closures. In Wuhan alone, over 900,000 primary and secondary school students attended virtual classes during their lockdown⁸, and while the learning impact of this sudden shift has not yet been documented, early indications are positive for those students with access to the Internet. However, the crisis has also revealed the depth and cost of the digital divide as online education has not been available to the many students in households lacking connectivity⁹.

Online learning does offer some incremental benefits, including helping prepare students for an increasingly digital world of work, improving communication with teachers, and catering to different learning paces. However, unless there is investment made to narrow the digital divide, in many countries the pandemic may deepen inequality by leaving already-disadvantaged students further behind.

Figure 6
How we develop – Education: perceived degree of impact and sentiment



⁶ Figures correspond to learners at pre-primary, primary, secondary, and tertiary education levels. Global monitoring of school closures caused by COVID-19, UNESCO, Peaking on April 5, 2020.
⁷ “Online Education Market & Global Forecast”, Markets and Research, December 2019.
⁸ “Wuhan: 900,000 primary and secondary school students start classes, 730,000 choose Tencent”, Tencent, February 24, 2020.
⁹ “The Coronavirus Exposes Education’s Digital Divide”, New York Times, March 17, 2020.

Labor-market related degrees

Our survey respondents clearly anticipate a sea of change in demand for and provision of skills. Specifically, 64% expect a large change in the types of skills that are prioritized in schools and universities to better match emerging market demands. Concerns about employability in the wake of a recession will drive changes in the direction of educational offerings. In Saudi Arabia, there is already an acknowledged mismatch between the job market requirement and available skills¹⁰. As people become more uneasy about the economy and their place in it, they will seek employment security in many ways, including by investing in their skills to ensure relevance in an uncertain future.

64% of our survey respondents expect a change in the types of skills required

This inevitable behavioral shift will lead to greater demand for educational offerings that provide these skills. For example, an increasing number of Saudis are likely to enroll in vocational education that provides them technical skills required for jobs presently filled primarily by expatriate workers. Additionally, demand will increase for offerings that equip people with 21st century skills, including in science, technology, engineering, and mathematics.

Education as a family affair

With schools closed and children at home, many parents globally have been forced to take over significant teaching responsibilities. In the Kingdom, our survey found that 58% of respondents expect the role of parents in their child’s education to increase in the medium-term as a result of the COVID-19 related school closures, half of whom see this as positive – a perception that is consistent with research that has demonstrated family involvement in education has a positive effect on student performance¹¹.

58% of our survey respondents expect the role of parents in their child’s education to change

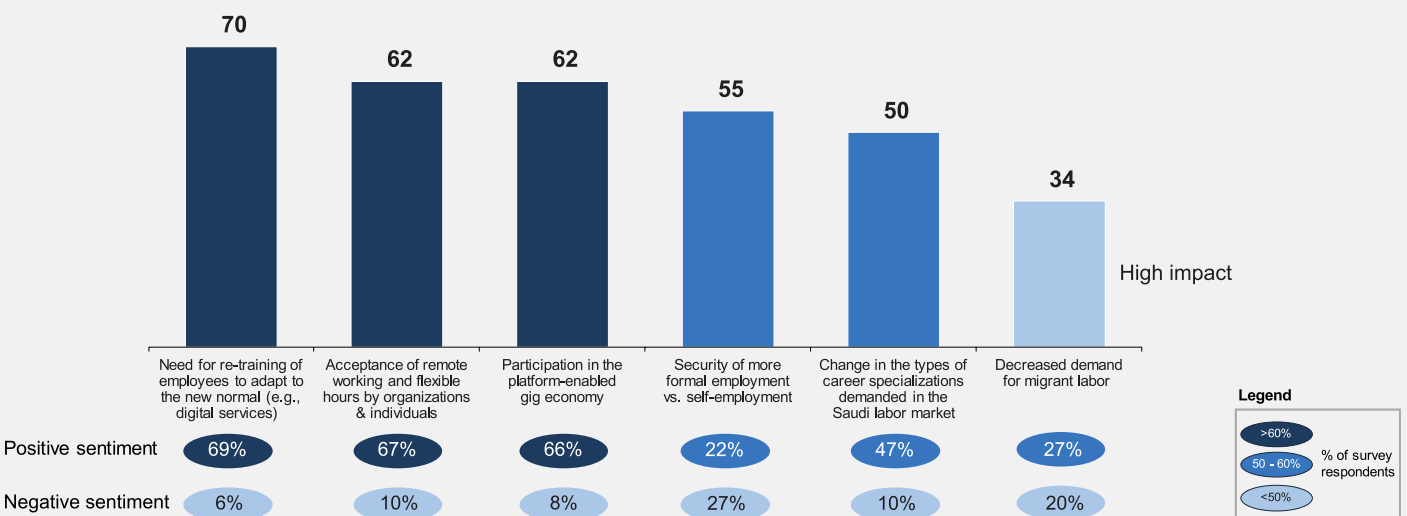
The OECD found that only ~40% of parents in Saudi Arabia discussed their child’s progress with a teacher¹²

New ways of working

Our survey findings suggest that Saudis anticipate that COVID-19 will drive significant workplace transformation and that remote working will not prove to be merely a short-term solution, but an enduring feature of the work environment.

90% of organizations¹³ encouraged or mandated employees to work from home due to the coronavirus

Figure 7
How we develop – Work: perceived degree of impact and sentiment



¹⁰ "Readiness for the Future of Work", MISK & Kearney, 2019.
¹¹ "The relationship of school-based parental involvement with student achievement: a comparison of principal and parent survey reports from PISA 2012", Sebastian, Moon, & Cunningham, Educational Studies 43:2, p123 – 146, 2016.
¹² "PISA 2018 Results", OECD Programme for International Student Assessment, Volume 3, p144, 2018.
¹³ 800 global HR executives surveyed. "Gartner HR Survey Reveals 88% of Organizations Have Encouraged or Required Employees to Work from Home Due to Coronavirus", Gartner, March 19, 2020.

Remote working is here to stay

While sentiment regarding remote working is largely neutral, 62% of our survey respondents believe that acceptance of remote work will increase significantly as a result of the current crisis.

62% of our survey respondents believe that acceptance of remote work will increase

The unprecedented worldwide “work-from-home experiment” has demonstrated that employees can be productive while working remotely. Organizations will, as a result, have strong incentives to become more flexible in allowing employees to work wherever they can deliver their best – even if this is outside the office. Current circumstances have forced organizations to accelerate implementation of technology and other support systems that enable remote working. In the future, more robust policies, practices, and systems will be developed that make flexible working arrangements even more viable.

Adaptable skillsets will be invaluable

Lockdowns seem to have accelerated the arrival of the “future of work”.

Skill demand for cyber-security, software development, machine learning, AI, digital content production, & data processing will increase¹⁴

To strengthen their resilience in the context of social distancing, organizations are accelerating digital transformations, increasing their online presence, and ruthlessly automating processes. In this context, digital skills that were already in demand before the pandemic are becoming ever more vital. This trend is confirmed in our survey results and clearly viewed as a positive development, as with seven-in-ten respondents indicating a positive sentiment regarding the increasing need for digital upskilling.

Organizations globally have demonstrated increased agility by pivoting to meet critical demands for medical supplies, Personal Protective Equipment (PPE), hand sanitizers and ventilators. However, in many industries, employees are using their core or adjacent skills to complete tasks outside of their pre-pandemic job descriptions. As the needs and priorities of organizations have been changed by this external shock, employees have had to become more agile in their work. Broad skill sets and, above all, flexibility and adaptability have been essential during this time.

69% of our survey respondents indicated a positive sentiment towards the increased need for digital upskilling

¹⁴ “The Big Freelance Skills Needed as Companies Rebuild After COVID 19”, Forbes, April 19, 2020.

How we live

“How we live” refers to many of the most tangible aspects of our everyday lives: the food we eat, the things we buy, the health systems we use, the homes in which we live, the entertainment we prefer, the trips we take, the personal finance decisions we make. Our survey respondents rated this pillar with both the highest medium-term impact (60% of respondents) and the lowest level of positive sentiment (48% of respondents). Within “how we live”, Healthcare and Retail were standouts, with 78% and 70% of our survey respondents rating a high medium-term impact, with an equally high-level of positive sentiment (78% and 57%). While Finance also had a high impact rating (68%), the sentiment was less positive (43%). Conversely, Travel and Entertainment were both perceived to have a meaningful level of sustained medium-term impact (59% and 53%), with the lowest positive sentiment (only 30% and 35%)

Figure 8
Overall impact and sentiment for “how we live”

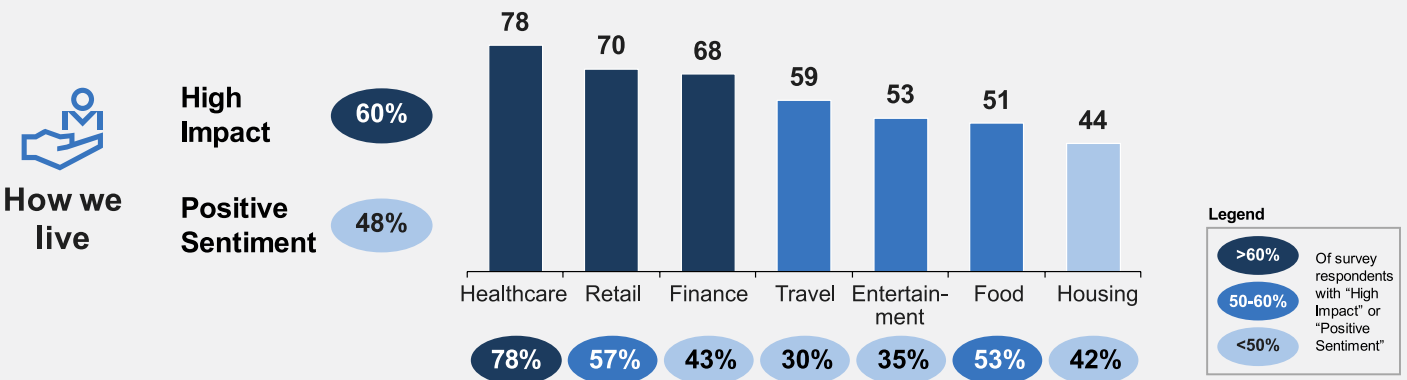
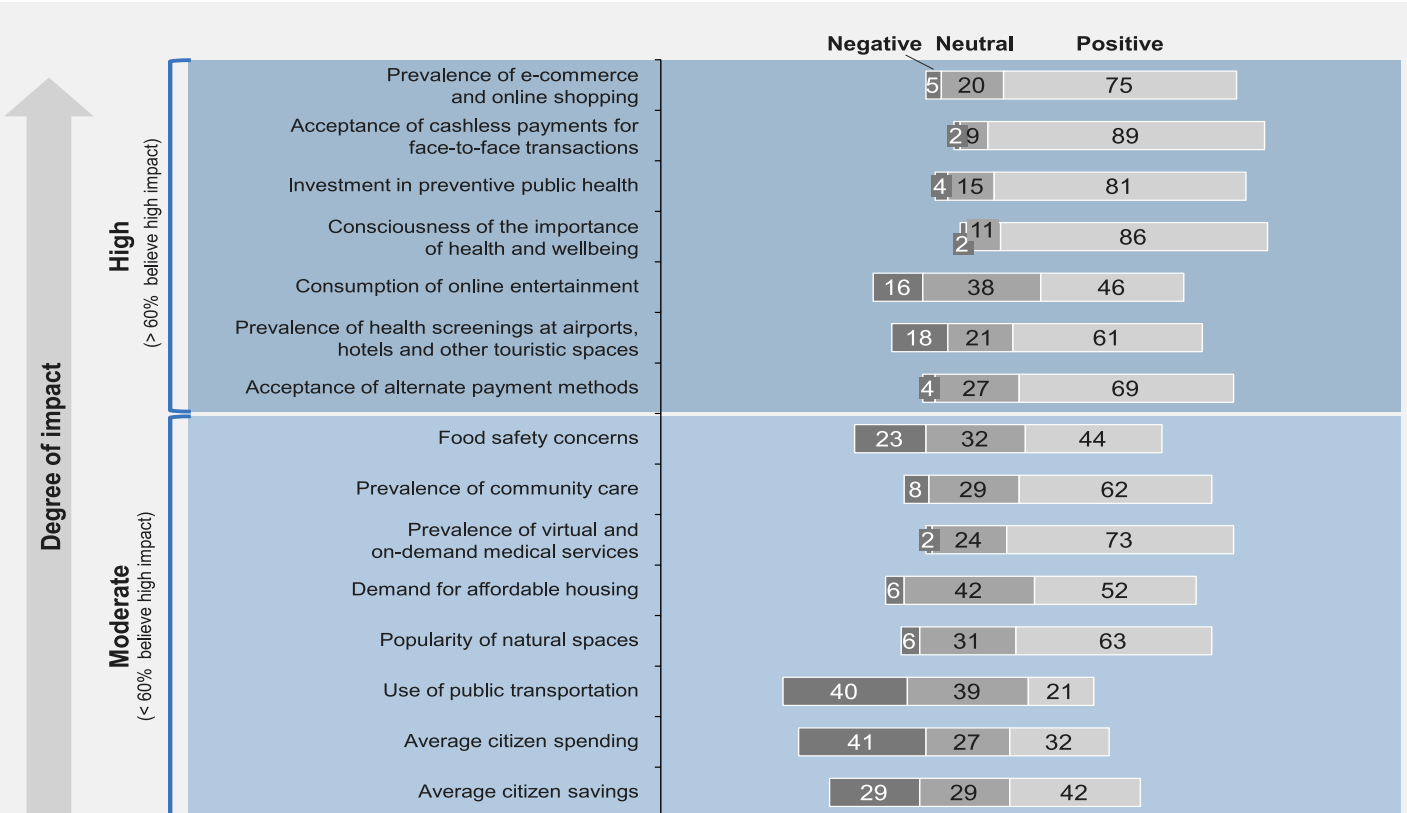


Figure 9
The perceived degree of impact on elements relating to “how we live”



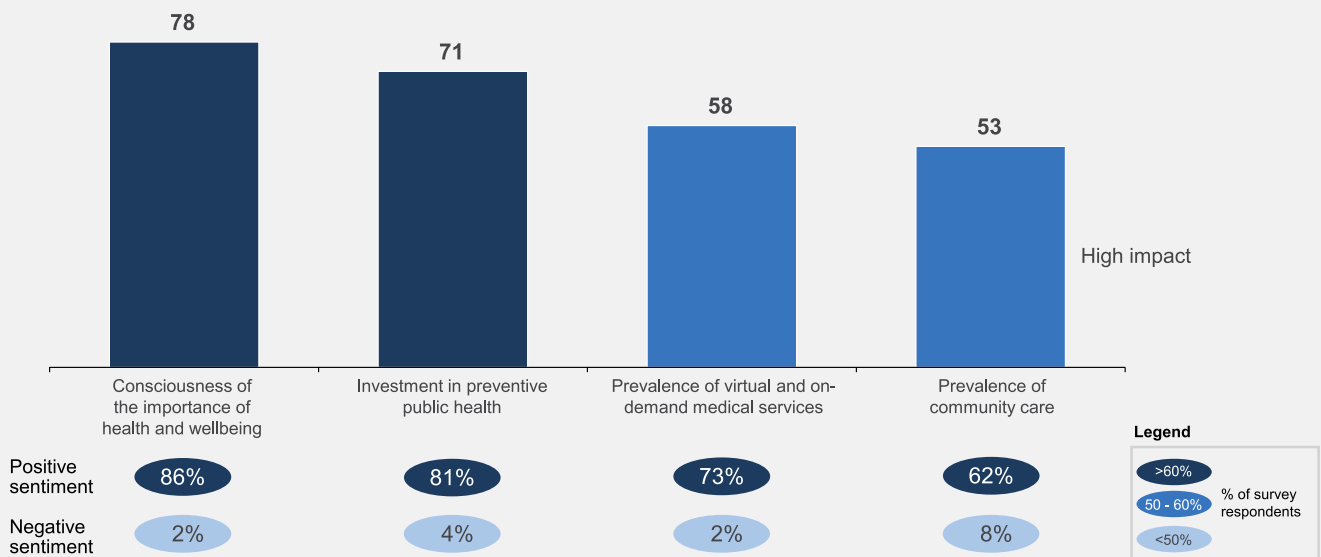
A healthier future

Saudis anticipate significant change in healthcare as a result of the pandemic, with their view of expected changes overwhelmingly positive. This bodes well for the Kingdom’s transition through the crisis given what is now the unprecedented centrality of healthcare in the everyday lives of people around the world. We have never been more aware of the criticality of healthcare workers caring for the sick, organizations helping fight infectious disease, companies producing pharmaceuticals, equipment, and supplies, and people delivering social services. As a result, it is expected that health will emerge as a national and international priority, likely to attract increased investment in public health, workforce planning, and emergency preparedness.

It has also led to an increased recognition of the importance of health and wellbeing by individuals, which could pave the way for healthier lifestyles in the future. Approximately 78% of Saudi respondents anticipate a high or very high and sustained impact from the crisis on national consciousness of the importance of health and wellbeing and, not surprisingly, 86% see this as a very positive development.

~78% of our survey respondents anticipate high impact on the importance of health & wellbeing

Figure 10
How we live – Healthcare: perceived degree of impact and sentiment



Virtual health

The use of telemedicine is another area in which the pandemic will have deep and lasting impact. Even more than in other sectors, social distancing practices have led to a spike in demand for digital engagement in healthcare. Natural concerns regarding the risks of transmission of the virus in health facilities have led to widespread reductions in regular care appointments. To help fill this gap, there has been a rise in “virtual physician” appointments and patients have become increasingly comfortable with these digital modes of interaction.

France saw a 50x increase in telemedicine appointments in March¹⁵

In Saudi Arabia, 58% of survey respondents believe there will be a high impact on the prevalence of virtual medical services with a positive sentiment (73%). Given these perceptions, it is likely that other forms of medical care, such as mobile clinics and “on-demand” house visits will become more accepted and prevalent in society, potentially reducing waiting time for patients and freeing up of space at clinics and pharmacies. Once again, action to address the digital divide will be critically important to ensure that these benefits are inclusively accessible.

58% of our survey respondents believe there is a high impact on virtual medical services

¹⁵ “When the dust has settled: healthcare after COVID-19”, Kearney, April 2020.

Shifts in shopping

Contactless commerce

The COVID-19 pandemic has ignited a resurgence in online shopping globally, as social distancing created sudden and lasting obstacles to traditional retail. The evidence is clear. For example, Amazon has hired 175,000 additional people in their fulfilment and delivery network to cope with the significant increase in sales on its platform.

Since COVID-19 curfews, 70% of Saudis spent more time shopping online and expect to maintain behaviour¹⁶

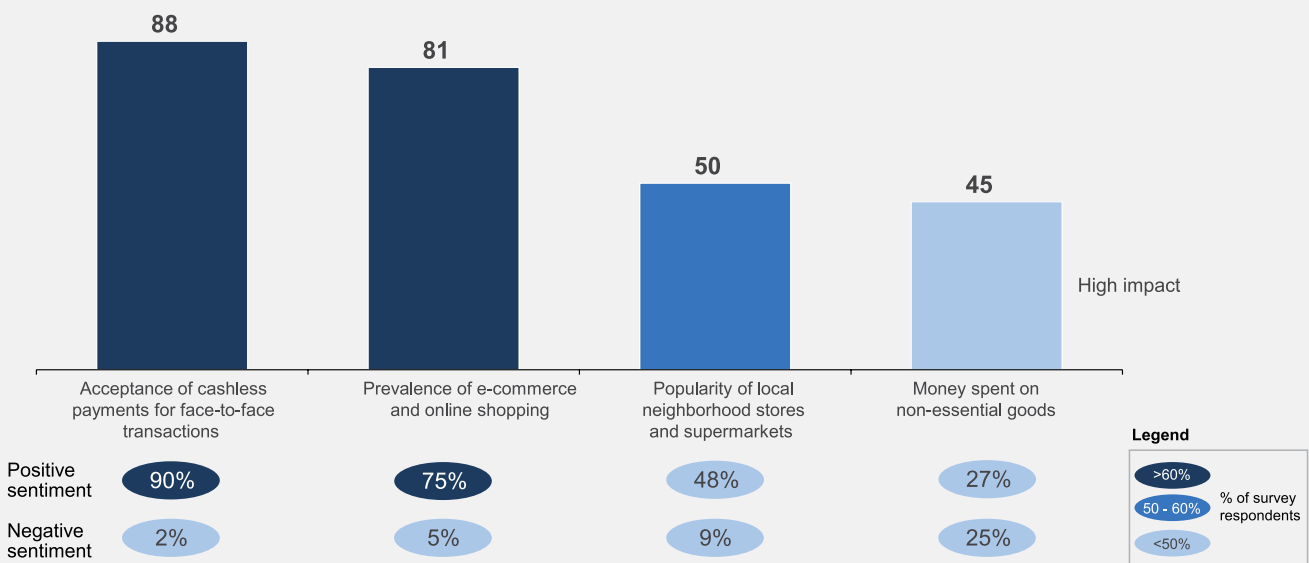
In Saudi Arabia, this trend is equally apparent. Among our survey respondents, four out of five anticipate that ecommerce will be increasingly prevalent. Interestingly, three-quarters of respondents see this as a very positive change, suggesting that as we emerge from the crisis, brick and mortar retail will face intensifying competition.

81% of our survey respondents anticipate ecommerce will be increasingly prevalent

In addition, the nature of face-to-face transactions in the Kingdom will change as almost nine-in-ten of our respondents expect acceptance of cashless payments to continue beyond the crisis amid ongoing social distancing restrictions, hygiene concerns, and the desire for greater control over person-to-person interaction. In fact, according to a survey done by Mastercard¹⁷ in Saudi Arabia, nearly two out of three respondents indicate that the COVID-19 pandemic has driven them to use less cash and four in five respondents stated that they would continue to use contactless payments after the pandemic. This technology-enabled behavioral shift toward contactless payments will be reinforced by its sheer convenience and ease of adoption. This is another clear example of the ways in which the pandemic has altered the barriers to adoption by requiring an extended period of use of new technologies.

Figure 11

How we live – Retail: perceived degree of impact and sentiment



Staying entertained (at a distance)

Online and digital entertainment

With people unable to leave their homes and access entertainment in the public square, there has been a sharp increase in the consumption of online and digital entertainment. This has been further driven by the free time many have as a result of reduced commuting time: by some estimates this

70% of our survey respondents expect an increase in consumption of online entertainment

¹⁶ Kearney survey. N = 500.

¹⁷ N= 1000. "Mastercard Study Shows Consumers in Kingdom of Saudi Arabia Make the Move to Contactless Payment for Everyday Purchases, Seeking Touch-Free Payment Experiences", Mastercard, April 2020.

increase in free time is as much as ~15% of waking hours. This trend is likely to be as pervasive in Saudi Arabia as it is globally, with seven-in-ten of our respondents expect an increase in consumption of online entertainment. However, only 46% of respondents viewed this development positively, potentially suggesting nostalgia for pre-pandemic forms of in-person entertainment.

A Kearney consumer survey found that 50% of Saudis spent more on entertainment during the pandemic¹⁸

The greater consumption of home entertainment is visible not only in television viewing statistics and the popularity of on-demand streaming services, such as Netflix or Amazon Prime video, but also in online gaming. The demand for new content and replacements for in-person experiences has also led to an increase in live stream events (for example music concerts) and the creation of virtual tours of museums and art galleries.

Consumption levels of online media streaming services are likely to last beyond the pandemic, supported by greater buy-in over recent months and the increasing familiarity with online platforms. In addition, there are now more flexible content options in comparison to traditional pay-TV services, which will likely see a reduction in new sign-ups in the short-term due to the lack of live sports content. Finally, this demand will be fueled by the decline in attendance of cinema and large-scale entertainment events as consumers seek “safe” entertainment products and experiences.

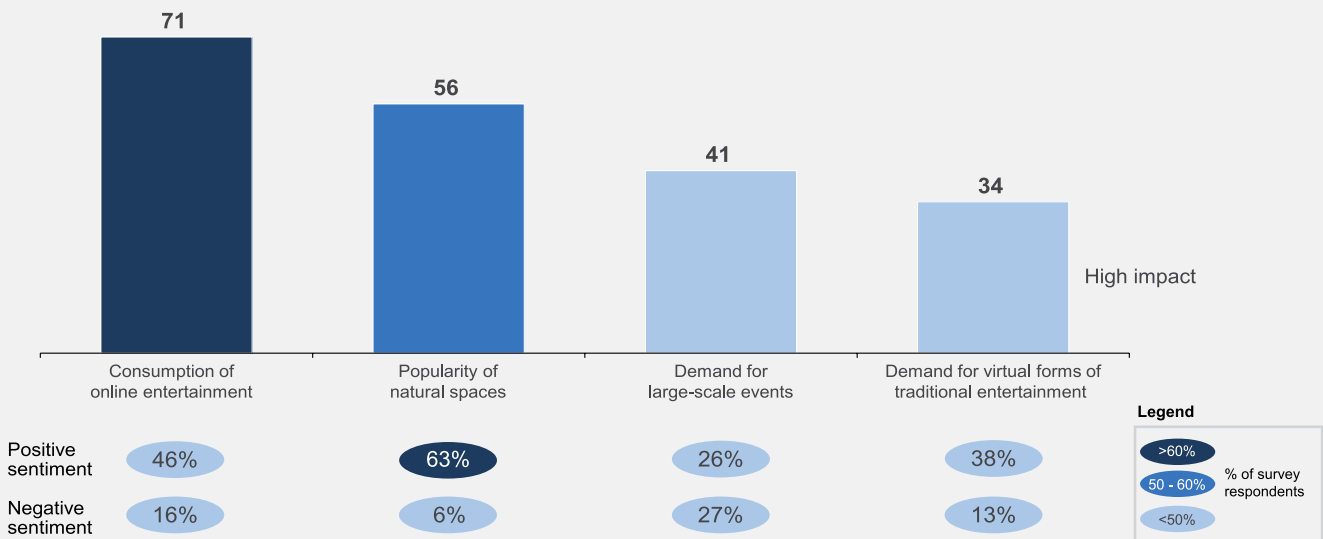
An overdue return to nature

One of the most striking areas in which our respondents see positive change is in the increasing popularity of natural spaces. 56% of our respondents expect such spaces to gain in popularity, and 63% expressed positive sentiment regarding this change. Because open and natural spaces are perceived as “healthy” and being outdoors is associated with diminished infection risk, the pandemic has created the conditions for what many understandably view as a long overdue return to nature. The Kingdom’s efforts to develop natural reserves and wildlife sanctuaries and to promote natural tourism in the country are proving to be exceptionally prescient in this new and unexpected context.

56% of our survey respondents expect popularity of natural spaces to grow

Figure 12

How we live – Entertainment: perceived degree of impact and sentiment



Safe travels

Business trips

The near-term impact of the pandemic on business travel has been stunning in its magnitude. In the medium-term; however, the outlook is less clear. The survey respondents were evenly split on

Half of our survey respondents expect the pandemic to significantly impact business travel

¹⁸ Kearney survey. N = 500.

the 2025 outlook for business travel, with 50% expecting the pandemic to significantly impact business travel and 50% anticipating a more rapid return to pre-pandemic levels. Sentiment regarding this change was also fairly evenly split, perhaps reflecting the clear tradeoffs between the increased efficiency of virtual interactions and the intimacy of in-person collaboration. Many have been surprised by how well virtual channels of interaction and collaboration have worked. While these digital interactions will never fully replace in-person meetings, many people will evaluate the need more deeply before boarding a plane – particularly in the short-term as many businesses face economic difficulty.

Kearney projects the air-travel market to reach pre-COVID-19 levels around 2024¹⁹

As indicated in a recent Kearney study of the future of aviation post-COVID, business air travel was already under pressure due to the push towards environmental sustainability. Companies had begun to review their business travel policies as they sought to reduce their carbon footprint, and COVID-19 induced travel restrictions will hasten this process. The reduction in business travel is likely to be more evident in developed economies, while emerging, faster growing economies are still expected to see increased demand in intercontinental flights for business in the medium-term.

Leisure trips

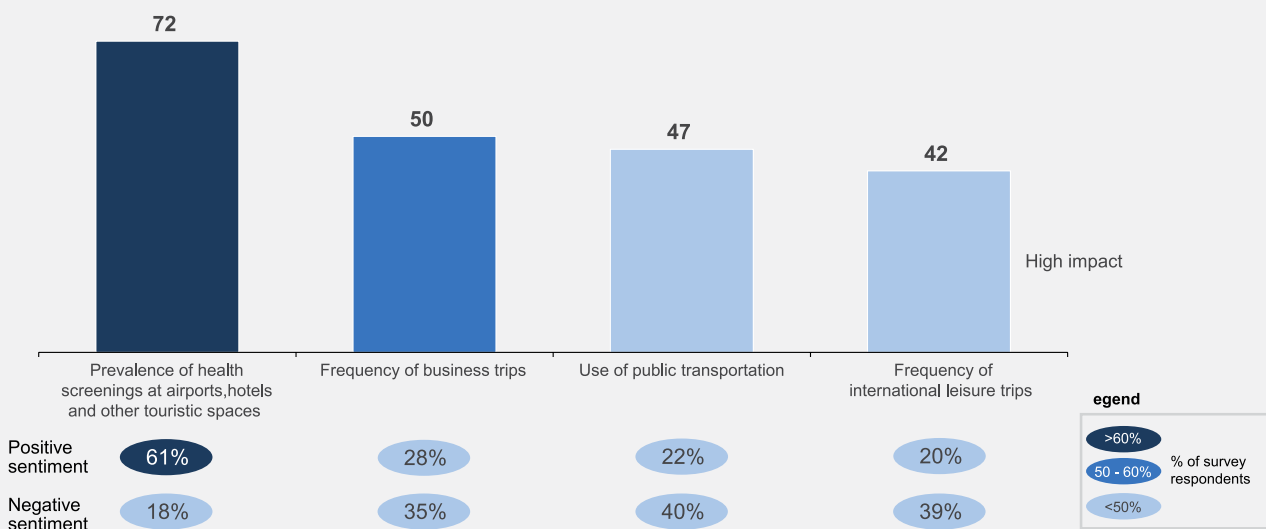
Pent-up leisure demand is expected to fuel the growth in travel in the next few years as safety concerns fade²⁰. This is suggested by our survey findings, in which a minority of only 42% expecting a high, sustained impact to the frequency of international leisure trips in the medium-term.

In the short-term; however, we are likely to see a return of the domestic traveler as international travel remains restricted. Even when international travel is once again a fully viable option, demand is expected to be mostly regional and between virus-free destinations.

As tourism starts up again, travelers will select their destinations and hotels differently. People will seek out reliable brands that can commit to high-quality health and hygiene standards and procedures. Sanitization will be the new security, and travelers will seek a seamless personal experience with minimal touchpoints. We are also likely to see longer stays in each destination and thus a demand for comfortable yet affordable accommodation. Further, travelers will seek stays in safe, “uncontaminated” spaces, and will be drawn to destinations that can offer more exclusive experiences in nature, away from crowded cities.

Figure 13

How we live – Travel: perceived degree of impact and sentiment



Public transport

Our respondents expect a moderate COVID-19 impact in the medium-term on the use of public transportation in Saudi Arabia, but 78% of respondents view this impact as negative or neutral. This is consistent with

¹⁸ “The future of aviation: could COVID-19 be the first and final crisis for airlines?”, Kearney, April 2020.
¹⁹ Ibid.

global trends. Given movement restrictions, there has been a significant decline in the need for public transit systems globally. Further, many people have been and are likely to remain hesitant to use public transport for some time given the risk of disease transmission in confined, crowded environments.

In the medium-term; however, this is expected to fade particularly as more public transport options become available and sanitization procedures are developed.

Our respondents (72%) also indicated an expectation that in the medium-term the pandemic will have high impact on the prevalence of health screenings at airports, hotels, and other touristic spaces. Unsurprisingly, but of tremendous significance for players in travel and tourism markets, three-in-five view this as a positive impact. This suggests that travelers may penalize providers who do not meet their now greatly elevated standards and expectations.

Personal finance

Reduced spending and increased saving

Social impact cannot, of course, be separate from economic and financial impact particularly at the individual level. Our study makes it clear that this is as true in Saudi Arabia as it is globally. At the global level, the COVID-19 pandemic has brought economic activity to a historic halt. Many businesses have been temporarily shuttered, with only essential services allowed to continue. This, in combination with movement restrictions and financial uncertainty, has inflicted economic suffering on many – particularly the most vulnerable – around the world. It has of course also led to a substantial decline in average daily spend by consumers. In Saudi Arabia, 60% of respondents expect reduced citizen spending. Interestingly, sentiment regarding this change is balanced reflecting the tradeoffs between the virtues of increased discipline in personal finance and the painful consequences for firms as a result of reduced demand.

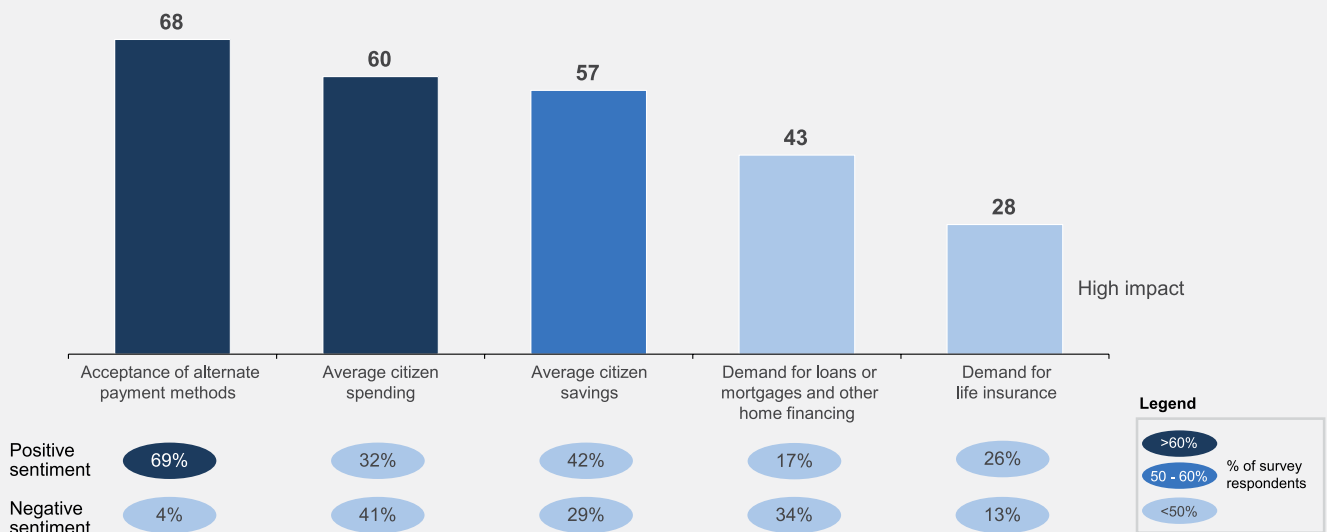
60% of our survey respondents expect reduced citizen spending

In the short term, reduced household spending is expected to continue as the economic downturn impacts personal incomes.

57% of our survey respondents expect savings to increase

The government response to this inevitable shock has been swift, with the private sector permitted to reduce salaries by up to 40% for six months to help prevent mass unemployment²¹. As a precautionary measure, and to prepare for future economic shocks, it is expected that average household savings will increase. Historically, as observed after the “Great Recession”, economic uncertainty has been associated with higher household savings²². 57% of our survey respondents expect savings to increase in the medium term and 71% view this as positive or neutral.

Figure 14
How we live – Finance: perceived degree of impact and sentiment



²¹ "Force Majeure Paves Way for Salary Cuts in Saudi Arabia", Asharq Al Awsat, May 4, 2020.
²² "Precautionary Savings in the Great Recession: Working Paper", A. Mody, F. Ohnsorge & D. Sandri: International Monetary Fund, 2012.

How we engage

“How we engage” refers to the diverse range of interactions that we have with others – family, friends, neighbors, strangers, the religious activities in which we take part, and the expectations we have of our governments. In this area that is so fundamental to our social lives, the survey reveals important opportunities to build on and sustain positive impacts of COVID-19, such as the willingness of citizens to contribute to government efforts. It also highlights that it will be important to take action to preserve some of the uniquely and vitally important cultural forms of engagement and gathering in Saudi Arabia.

Our survey respondents rated this pillar overall tied for second highest medium-term impact (57% of respondents) and the second lowest level of positive sentiment (53% of respondents). However, within “how we engage”, Government was a standout, as 73% of our survey respondents rated a high medium-term impact, with an equally high-level of positive sentiment (73%).

Figure 15
Overall impact and sentiment for “how we engage”

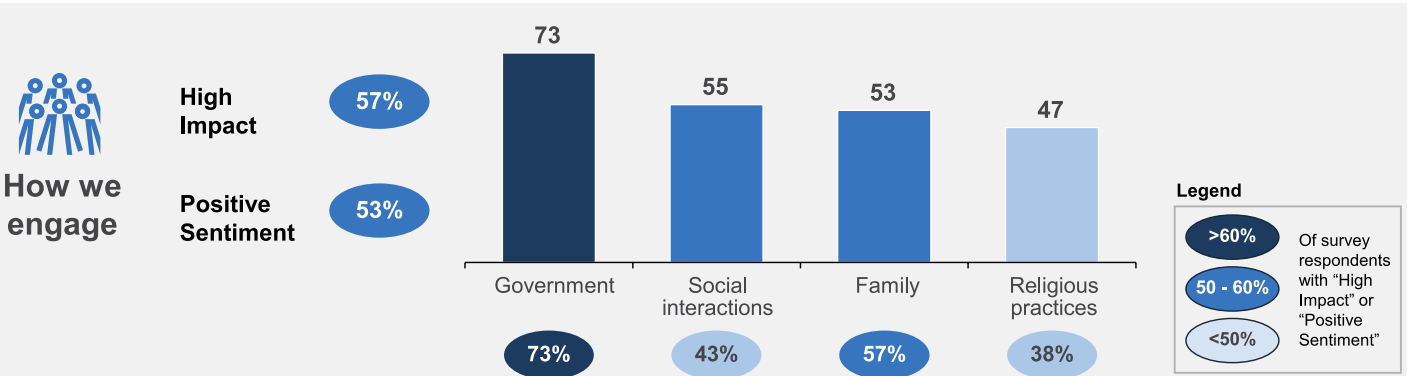
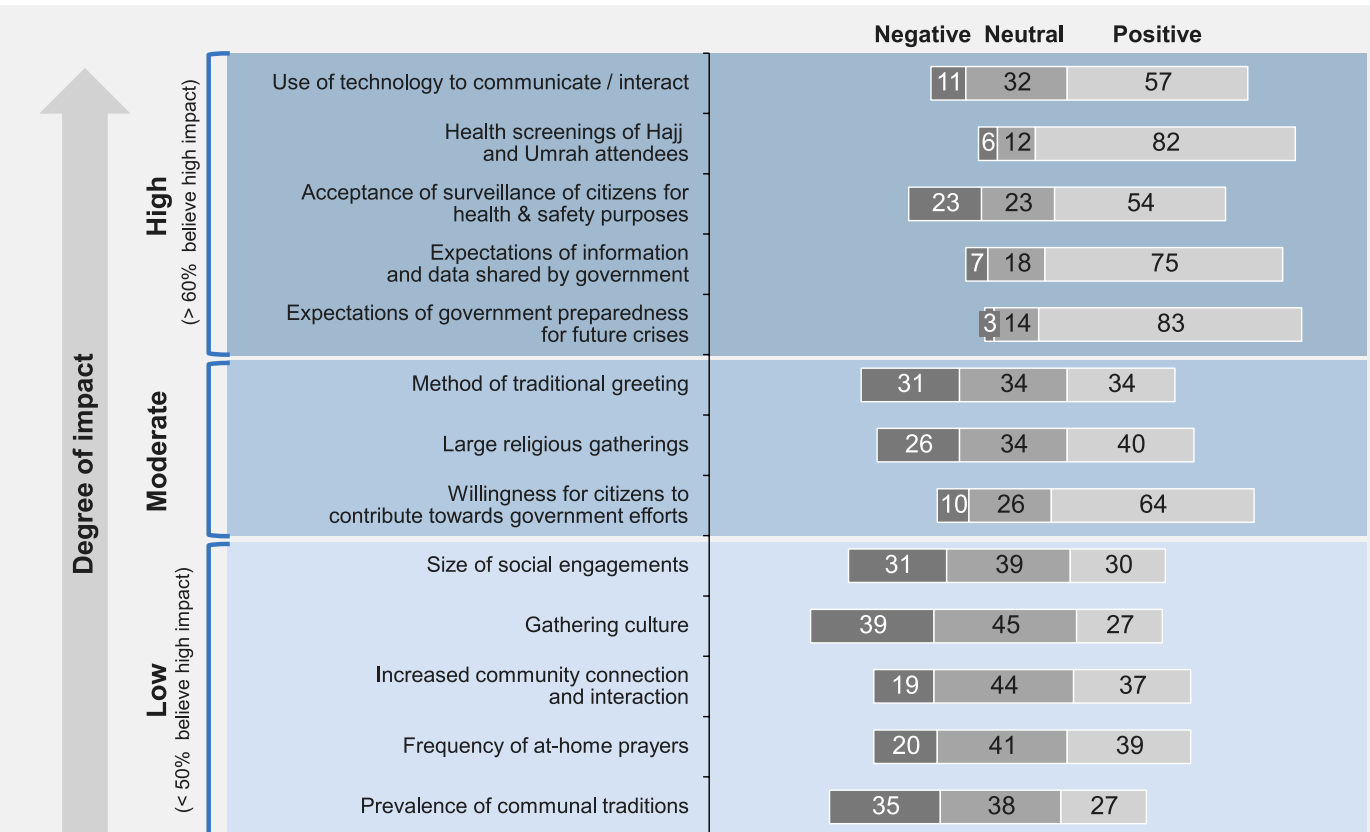


Figure 16
The perceived degree of impact on elements relating to “how we engage”

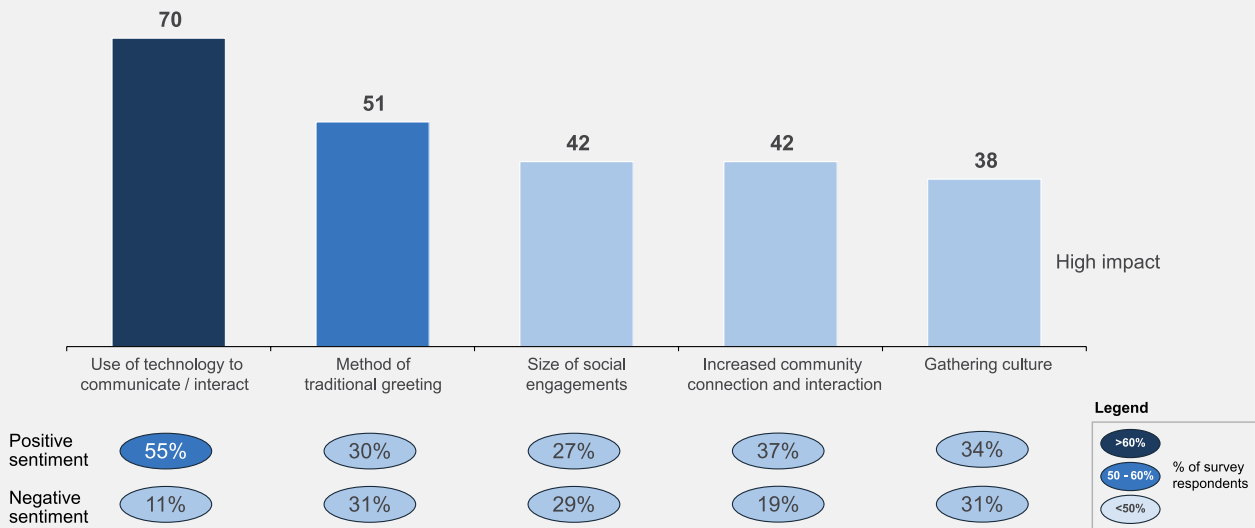


Social interaction

Physical contact is a natural and pervasive part of human life and interaction – a handshake, a hug, a pat on the back. These basic forms of connection have been deeply disrupted by the pandemic. Concerns over disease transmission, paired with social distancing, have created aversion to close contact with people requiring adjustments to how we maintain social connection. Depending on the trajectory of the pandemic and the time it takes to develop and deliver effective treatments and a vaccine, these changes may not endure beyond the short-term. By 2025, only 38% of our respondents expect the gathering culture of Saudi Arabia to have changed significantly. However, 51% do expect high or very high sustained impact on methods of traditional greeting. This diminishment of touch has been empirically demonstrated to be stressful. In-person interactions encourage the brain to release a neurochemical called oxytocin, deficits of which can cause feelings of stress. While not as effective as face-to-face engagement, interacting via video still helps foster interpersonal connection and facilitates the release of oxytocin²³. This is one of the many ways in which this global crisis will test our collective ability to adapt and find novel ways to stay meaningfully connected and socially engaged.

Figure 17

How we engage – Social Interactions: perceived degree of impact and sentiment



Online connections

Since the onset of the pandemic, many communities have come closer together using social media. Amid social distancing, more people are using social media to connect. Traditional social media sites (such as Facebook, WhatsApp, and Instagram) have seen increased usage, and video chat apps have also seen significant growth as people seek connection beyond messaging²⁴. Indeed, many people have experienced an increase in interactions with the friends and family they do not regularly see as their lives slow down. In Saudi Arabia, 70% of our survey respondents expect the increase in the use of technology to communicate and interact to endure through 2025 and 55% view this as positive.

70% of our survey respondents expect increased use of technology to communicate and interact to continue

Global trends help explain this expectation; online communities help fill the gap of traditional community connection as people seek support during this difficult time. The longer the social distancing recommendations remain in place as the pandemic evolves, the more reliant people are likely to become on such online groups for their social needs. Multiplayer video games have also seen an uptick, delivering entertainment to users while also providing a way to socialize. Online gaming has allowed for the development of virtual communities, tapping into the under-served need social interaction.

Social media engagement increased by 61% over normal usage rates in March²⁵

²³ "The Coronavirus Outbreak Keeps Humans from Touching. Here's Why That's So Stressful", Time: M. McCluskey, April 10, 2020.
²⁴ "The Virus Changed the Way We Internet", New York Times: E. Koeze & N. Popper, April 7, 2020.
²⁵ N > 25,000, 30 countries. "COVID-19 Barometer: Consumer attitudes, media habits and expectations", Kantar, April 3, 2020

This increased virtual interaction between people is expected to last well-beyond the coronavirus pandemic but is unlikely to replace face-to-face interactions. What may be impacted; however, is the size of gatherings that people attend. Restrictions around gatherings will be relaxed as the pandemic fades; however, in the short-term, people will still be wary of joining large gatherings and will likely prefer smaller, intimate interactions between trusted friends. In Saudi Arabia in the medium-term, majorities of respondents, 58% and 62% respectively, believe that the size of social engagements and gathering culture will not be highly impacted in the medium-term.

Family life

Roles and interactions

Among the most important, but underreported global impacts of the pandemic have been the changes it has caused in household structure and responsibilities. For example, parents have taken on the roles of teachers and caretakers while continuing to meet the demands of working remotely during the pandemic. In multigenerational households with elderly persons (or others who may have an increased risk of severe illness from the coronavirus) this change has been even more pronounced. Shielding vulnerable family members has been encouraged and, in many cases, has required significant shifts in the distribution of household responsibilities. For some, this has meant at-risk people no longer take care of the children in the household, requiring parents to rebalance work responsibilities. For others, it has meant reassignment of grocery and other household shopping responsibilities. In many cases, frontline workers, such as medical staff, have moved out of their homes to shield other household members from potential disease transmission. It remains to be seen to what extent these impacts will endure beyond this pandemic.

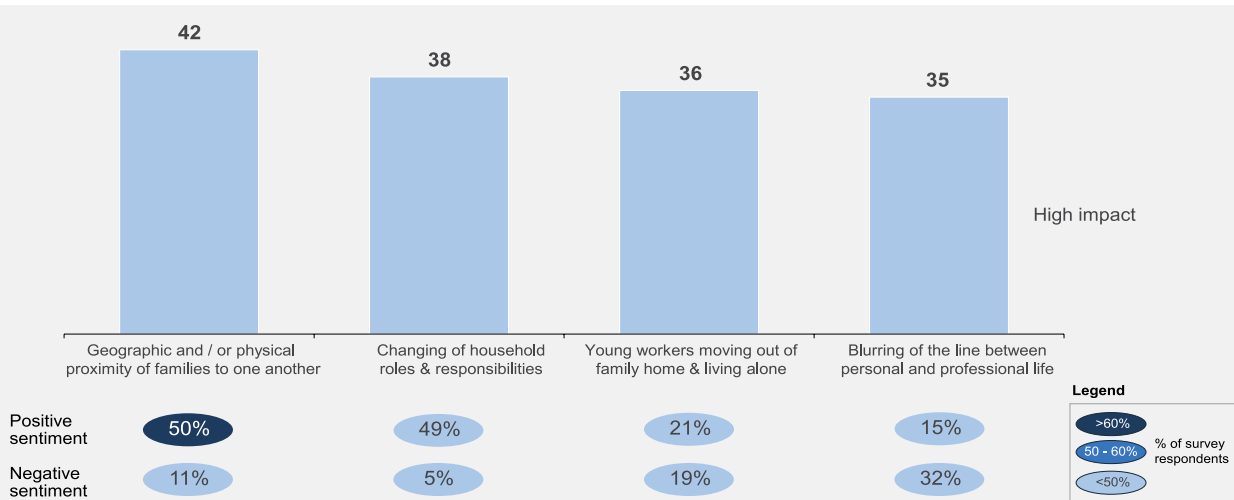
Further, the traditional primary role of women in childcare is also changing. As fathers spend more time at home, there is likely to be a longer-term impact on family dynamics and the balance of parental responsibility. Studies done in Germany and Spain have revealed that paternity leave leads to a persistent increase in the involvement of fathers in childcare.²⁶ The pandemic may permanently increase men’s participation in household care and labor.

In Saudi Arabia, looking beyond the short-term impacts, our survey respondents do not expect major lasting changes to family life. In the medium-term, only slightly more than a third of respondents believe that the blurring of personal and professional life will be a more permanent feature in Saudi Arabia. Similarly, less than 40% of respondents believe a major change in household roles is afoot. The diverging outlook regarding work habits and family roles is likely to reflect the belief that strict social distancing requirements will be temporary, and that the segregation between professional and personal life will return as the pandemic eases.

Our survey respondents do not expect major lasting changes to family life

Figure 18

How we engage – Family: perceived degree of impact and sentiment



²⁶ "The Impact of COVID-19 on Gender Equality", Northwestern University: T. Alon, M. Doepke, J. Olmstead-Rumsey & M. Tertilt. March 2020.

Religious practices

Prominent religious leaders globally have issued opinions, guidance documents, and fatwas to their communities to provide their views on how acts of faith can be adapted during social distancing. In Saudi Arabia, Tarawih prayers were being held at the two holy mosques in Mecca and Medina without public attendance and Eid prayers were performed at home. While these changes are significant, in the medium and longer term, our survey indicates the clear expectation that they will diminish.

Communal worship

To protect the health of devotees, and encourage social distancing, Friday prayers in mosques have stopped on a global scale and are being held at home instead. Umrah has been suspended and the ministers of Hajj and Heath have announced guidelines to assure the safety of pilgrims during Hajj 2020, including age restrictions, social distancing measures and limits on the numbers of pilgrims.²⁷ The Kingdom announced that it will hold Hajj this year but will limit it to worshippers residing in the Kingdom.

While we may see more prayers held at home than in public spaces or mosques in the medium-term, mosques have indeed resumed services as of the end of May amid strict health and safety measures. Increased health measures will, however, be put in place in all dedicated spaces of worship to ensure people remain safe. This expectation aligns with survey respondents, where a small majority, 53%, expect only small changes in the frequency of at-home prayers in the medium term.

Much more stringent health and hygiene standards are expected to be implemented for the holy pilgrims. Before pilgrims can enter holy sites, or even the accommodation in which they will stay, they will need to undergo health checks to verify that they are not virus carriers. Even with this in place, disinfection practices will be ramped up. This will not only reduce the chance of many pilgrims getting sick while performing the holy ritual, but also provide comfort and security to those who plan to attend the pilgrimage. Our survey results indicate very high support, and expectation, for increased health screenings for Hajj and Umrah attendees, with 80% of respondents responding positively.

Our survey indicates high support, and expectation, for increased health screenings for Hajj and Umrah attendees, with 80% responding positively

Government interactions and expectations

Expectations of governments

Much like engaging in a war, fighting the COVID-19 virus has established a sense of solidarity amongst people. It is also likely to lead citizens to demand a more robust social safety net, particularly with respect to healthcare. Expectations of government-provided economic and social protection are likely to increase globally following the coronavirus pandemic and as the subsequent recession unfolds. Governments will also be expected to improve their preparedness for future shocks.

80% of people across 11 countries (including KSA) expect their governments to provide economic relief²⁸

Our survey results show over three-quarters, 78%, of respondents expect a high degree of government preparedness for future crises and unsurprisingly view this with highly positive sentiment (83%). As in other countries, national resilience in the face of crisis breeds national pride, and also high expectations of excellence in the future.

78% of our survey respondents expect a high degree of government preparedness for future crises

Similar positive expectations with respect to government information sharing will also likely increase, including regarding the preparatory measures taken to safeguard against future crises. Again, in the case of the Kingdom, this is validated in our survey, where 68% of respondents expect a large impact in government information sharing, with three-quarters of respondents expressing positive sentiment towards such impact. For government entities, this places a tremendous premium on transparency as part of efforts to prevent the negative outcomes experienced during this pandemic from recurring.

75% of Saudis are willing to give more location tracking & personal health data to the government to help track and contain the virus²⁸

²⁷ "Saudi Arabia: Hajj 2020 to be held with limited number of pilgrims", Arab News, June 23, 2020.

²⁸ N > 13,200. "Edelman Trust Barometer 2020: Trust and the Covid-19 Pandemic", Edelman, May 5, 2020

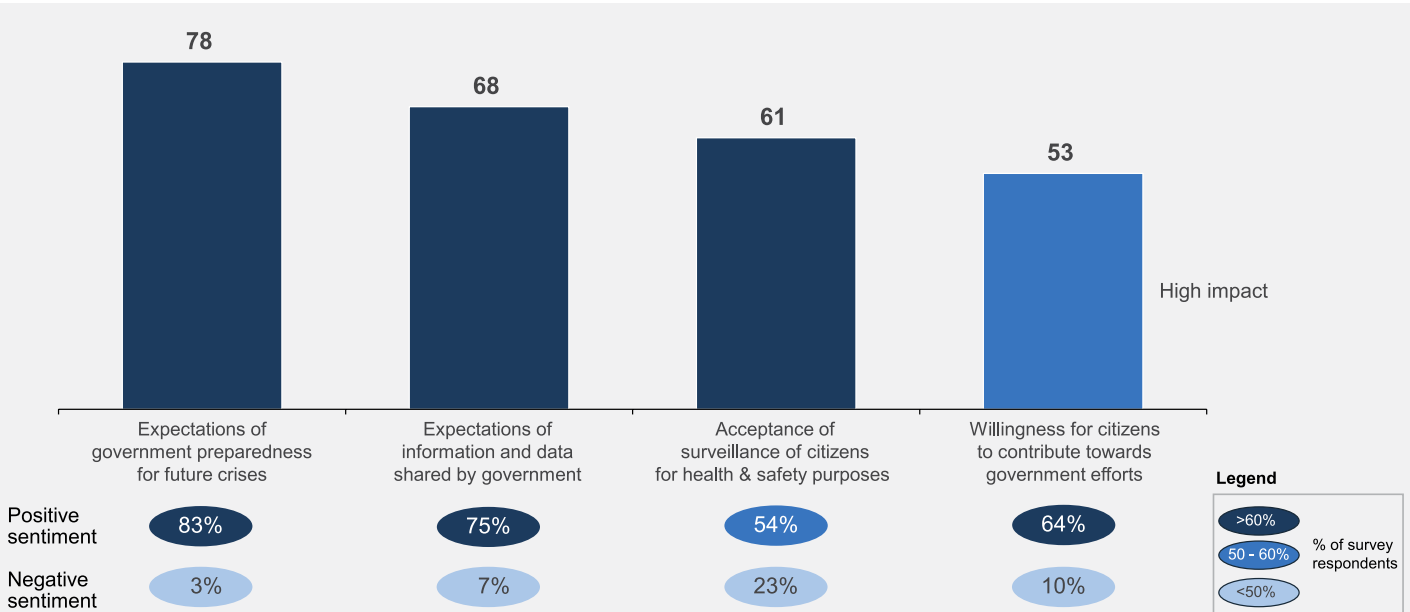
Citizen contribution

The crisis has also led to a shift in the balance of citizen priorities between health, security, and privacy. 61% of respondents indicated acceptance of government surveillance for health and safety purposes. This reveals that citizens trust that government institutions are focused on the best interests of citizens. This growing trust and solidarity are also plainly visible in the expectation among our respondents that the willingness of citizens to contribute to government efforts will increase, with 64% viewing this as positive. These indications of trust create the foundation for effective government action. At the same time, the growing expectations of government excellence make very clear the importance of continuing to drive effective action.

61% of our survey respondents indicated acceptance of government surveillance for health and safety purposes

Figure 19

How we engage – Government: perceived degree of impact and sentiment
































3. A call to action

There are three emerging sets of actions that can be taken to accelerate the positive change that this pandemic has initiated, sustain vital aspects of current ways of life, and secure the Kingdom against future crises. In each of these three areas, we outline three sets of strategic imperatives for government organizations, the private sector, and individuals to consider taking forward.

The opportunity of renewed unity

In confronting and navigating the current crisis, while there has been physical separation, we have also seen new forms of and degrees of unity against a common enemy. This shared experience, although exceptionally difficult and in many cases tragic and heart-breaking, has brought people together in new ways and increased our mutual understanding and compassion. The Kingdom has an opportunity to use this shared experience to drive actions that society can take forward toward the post-pandemic future. It is now possible to bring new unity and fresh perspectives to how we develop, live, and engage.

Figure 20
Nine Strategic Imperatives
























	Desription	Stakeholders	
Accelerate			
	Digital inclusivity	Accelerate digital literacy to maximize the growth of the digital economy and narrow the digital divide	  
	Working in new ways	Prepare for and adjust to new ways of working, increased digitization, and “gig economy” contractual work	  
	Healthcare transformation	Leverage increased health consciousness to motivate healthier lifestyles and drive modern health practices	  
Sustain			
	Safe communal engagement	Enable low-risk communal engagement and identify safe communal spaces, including by using health and location information shared by individuals	  
	Local production	Encourage local production and commerce to build supply chain resilience and stimulate domestic economic activity	  
	Quality of life	Adapt implementation of entertainment and tourism initiatives to better suit the demand for natural and safe spaces in the context of the new pandemic-driven sensibilities of citizens	  
Secure			
	Safety within urban settlements	Design urban spaces and unplanned urban settlements to reduce the risk of potential future health crises	 
	Border systems	Implement advanced border and ports management systems to support safety and security of Saudi residents	
	International collaboration	Drive international, mutually beneficial collaboration to address the pandemic and other global challenges	 
Stakeholder legend:		 Government  Private Sector  Individuals	




Accelerate

The coronavirus pandemic has transported many aspects of our lives to the future much faster than anticipated. We can use this momentum to accelerate positive change that is already being driven in the Kingdom. We have highlighted three ways in which this can be harnessed.

Figure 21

Accelerate – Overview of Potential Actions

 Accelerate	
Digital Inclusivity: Accelerate digital literacy to maximize the growth of the digital economy and narrow the digital divide	
Government and the private sector must continue to invest in and accelerate their efforts to drive digital skills transmission inclusively - across all facets of Saudi society - to sustain the growth of the digital economy and reduce the extent and cost of the digital divide	 
Educational institutions (from primary to tertiary) must embed the development of digital skills in curricula to advance the preparation of students for the digital world. Government support of the provision of equal access to the tools required for “blended learning” (e.g., hardware, Internet provision) is also a vitally important imperative.	 
Government must reinvest in and accelerate its e-government strategy using digital platforms to engage with citizens to ensure alignment and agility. This must include offering online portals to access public services to using digital channels to communicate and engage with citizens	  
Working in new ways: Prepare for and adjust to new ways of working, increased digitization, and “gig economy” / contractual work	
Government organizations, the private sector and individuals must proactively adjust to what will be increasingly “fluid” work environments through more agile workforce design, facilitated by the platform-enabled gig economy, and a greater focus on achievement of objectives, rather than mere employee presence (e.g., increase in contract work)	  
Government and the private sector must develop fair and effective remote working policies and processes: to support greater team collaboration and remote work culture development. The government must also develop the supporting regulations to support this (e.g., regulations for part-time employees and freelance workers).	 
Government and the private sector must drive upskilling and re-skilling of employees, with a focus on “soft skills” recognized as important to facilitate business resilience during the pandemic (e.g., innovation & creativity, emotional intelligence, critical thinking, communication, life-long learning)	  
Healthcare transformation: Leverage increased health consciousness to motivate healthier lifestyles and drive modern health practices	
Government must continue to invest in preventative public health and the development of adequate health system capacity to maintain citizen trust (e.g., evaluate current health spending, policies, and strategies)	
Government must continue to drive the “digitization of healthcare” through development of telemedicine regulations (e.g., insurance), and supporting the adoption of telemedicine and implementation of digital health information systems and healthcare records (e.g., upskill healthcare staff, develop data privacy policies)	  
Government and private sector must continue to promote healthier lifestyles leveraging digital and behavioral instruments (e.g., engage health insurance to promote healthy living through apps that reward exercise, better eating, and frequent health checkups) and supporting the wellbeing of residents and employees (e.g., health policies, education on mental health)	  

Stakeholder legend:  Government  Private Sector  Individuals


Sustain

The necessary social distancing measures and resulting economic slowdown have revealed some threats towards valued ways of life. Below are three focus areas that may help to mitigate these potential negative impacts on society, thereby sustaining important characteristics of a forward-moving Saudi Arabia.

Figure 22

Sustain – Overview of Potential Actions

 Sustain	
<p>Safe communal engagement: Enable low-risk communal engagement and identify safe communal spaces, including by using health and location information shared by individuals</p>	
<p>Government, in partnership with the private sector, must develop the policy framework and support the development of a set of technology-enabled solutions for sustaining the ability of citizens to engage in safe communal interactions (e.g., ways to identify low-risk public spaces and potential hotspots for transmission on an anticipatory basis)</p>	 
<p>Enable individuals to contribute to increased transparency in terms of sharing of personal health and location information in the interest of public health and individual freedoms by creating systems that enable appropriate levels of privacy protection. This will require the government to develop the associated policy frameworks for managing individuals' data and information.</p>	  
<p>Local production: Encourage local production and commerce to build supply chain resilience and stimulate domestic economic activity</p>	
<p>Government must incentivize the development and implementation of agricultural technology to reinforce the Kingdom's push towards greater food security (e.g., endorse local food processing plants, link small-scale agricultural producers to markets, promote consumption of local aquaculture products, encourage sustainable less water-intense agricultural practices)</p>	  
<p>Government must continue to aid in the growth of local pharmaceuticals and medical equipment manufacturing (e.g., removal of barriers to entry, regulatory framework development, technical skills development), with a focus on localization of production to build strategic autonomy and resilience</p>	 
<p>The private sector has both an opportunity and responsibility to scale-up online retail ecommerce platforms to address the significant growth in online retail in KSA during and following the pandemic (e.g., grocery, food delivery apps) and support the local production of goods</p>	
<p>Quality of life: Adapt implementation of entertainment and tourism initiatives to better suit the demand for natural and safe spaces in the context of the new pandemic-driven sensibilities of citizens</p>	
<p>Government must develop innovative ways to continue to deliver on its commitments to citizens for entertainment, including by leveraging virtual methods of delivering entertainment to meet citizen expectations in the context of ongoing social distancing requirements (e.g., virtual museums & art galleries, online screenings of Saudi films or theatre performances, etc.)</p>	  
<p>Government must create an even more favorable enabling environment for the private sector to drive local media content creation and address existing gaps in local content, including by developing the required infrastructure and policies</p>	 
<p>Government must continue to promote natural tourism opportunities (e.g., untouched desert, beaches, mountains) as a means of establishing tourist "safe havens". The government and private sector must cater to the health- and sustainability-conscious traveler (e.g., flexible travel policies, health screenings, sanitization and hygiene procedures, digital technology)</p>	 








Stakeholder legend:  Government  Private Sector  Individuals

Secure

The global crisis has revealed some potential future challenges that may emerge if pandemics and other safety concerns become more prevalent. Three measures that can be taken to secure against these issues have been outlined below.

Figure 23

Secure – Overview of Potential Actions

Secure	
<p>Safety within urban settlements: Design urban spaces and unplanned urban settlements to reduce the risk of potential future health crises</p>	
<p>Government must revisit the accommodation regulations for Saudi work visa sponsors (e.g., standards, location) as it relates to migrant workers within labor camps, given the high spread of the virus across such communities, to ensure the safety of the broader Saudi community</p>	
<p>Government must revisit existing unplanned urban settlements in Saudi cities to define and launch solutions that can better monitor the health and safety of residents and mitigate against future risk, given that these areas have been highlighted globally as high-risk areas for the transmission of diseases</p>	
<p>Border systems: Implement advanced border and ports management systems to support safety and security of Saudi residents</p>	
<p>Government must continue to develop policies, processes, and enabling technologies to support advanced border and ports management systems to trace goods and people entering the country (e.g., better tracing, contactless access, streamlined process) to reassure residents, traders, and travelers of the safety of Saudi ports and borders without slowing the flow of goods that is so crucial to economic growth</p>	
<p>International collaboration: Drive international, mutually beneficial collaboration to address the pandemic and other global challenges</p>	
<p>Governments and key sectors must drive new forms of international collaboration and partnership to leverage economic complementarities in the service of renewed growth. This collaboration would include joint efforts in the development, testing, manufacturing, and distribution of affordable vaccines and therapeutic drugs. Such cross-governmental collaboration and a drive towards affordable access to medical R&D will help ensure that Saudi Arabia and its partners jointly strengthen their preparedness for future crises</p>	
<p>Stakeholder legend:  Government  Private Sector  Individuals</p>	

About the authors

Al-Aghar Group

Al-Aghar Group is an independent Saudi think tank that is registered as an endowment to ensure transparency and sustainability. The group's core value lies in the active implementation of social, cultural, and economic development programs aimed at addressing national issues and international affairs of interest to Saudi Arabia and transforming the Kingdom into a knowledge-based society and economy. This was a part of our umbrella strategy (knowledge society), which was successfully integrated in the national strategy plan.

Al-Aghar's aim is to contribute to the Kingdom's vision by providing strategic options to policymakers in relevant areas.

Kearney's National Transformations Institute

The National Transformations Institute is dedicated to helping senior government and business leaders to anticipate and steer the diverse and accelerating transformations that are happening across the globe, based on rigorous strategic foresight.

The Institute specializes in strategic foresight and policy analysis, supporting government institutions and corporations at global, regional, national, and multilateral levels in anticipating, harnessing, and creating change.

Based on deep expertise in the techniques of strategic foresight and with experience at senior levels of government in strategy and policy planning, the National Transformations Institute translates macro-level analysis of the forces of change in practical, innovative courses of action. The Institute develops thought leadership on key emerging topics shaping the future environment faced by institutions across the world. It also convenes world-class regional and global forums that serve as a platform for leaders across the globe to engage with peers and subject matter experts on key strategic issues.



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