

National Family Strategy Overview

2020

The family is positioned at the center of Saudi's ecosystem, emphasized by the Islamic religion, government's constitution and future vision

1 Family plays a crucial role in enabling the entire society's well-being in Islam

SOCIAL PRESERVATION

A strong Muslim family should contribute significantly to the development of societies and communities

SOCIETY BUILDING BLOCK

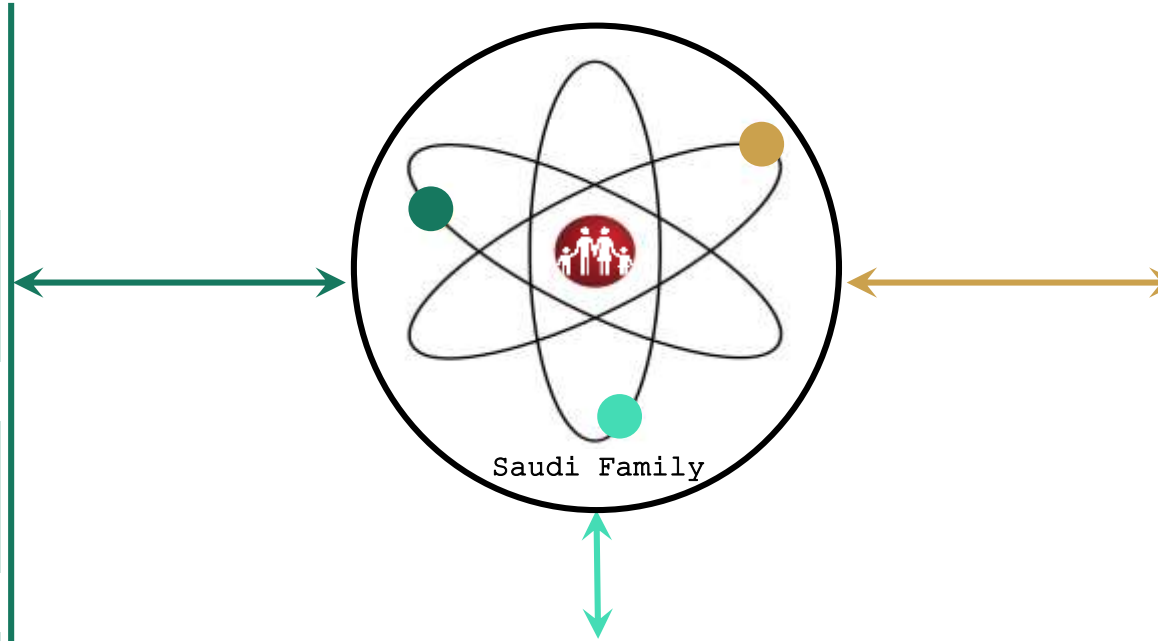
The Muslim family is the basic building block of a society as the stability of communities depends on the families stability

VALUES ENTRENCHMENT

The Family plays a major role in teaching moral behavior to children by entrenching Islamic values into their education

OFFSPRING WELFARE

A Muslim family provides physical and emotional safety for children along with moral guidance as needed



2 Family is the nucleus of Saudi society in the government's

“

The nucleus of Saudi society is the family [...]

-Chapter Three, Article 9

“

The state will aspire to strengthen family ties, maintain its Arab and Islamic values and care for all its members, and to provide the right conditions for the growth of their resources and capabilities.

-Chapter Three, Article 10

Basic Law of Governance 1412 AH

3 Family is at the centre of KSA's aspirations and future planning

At the heart of Vision 2030 is a society in which all enjoy a good quality of life, a healthy lifestyle, and expanded cultural

~~opportunities~~

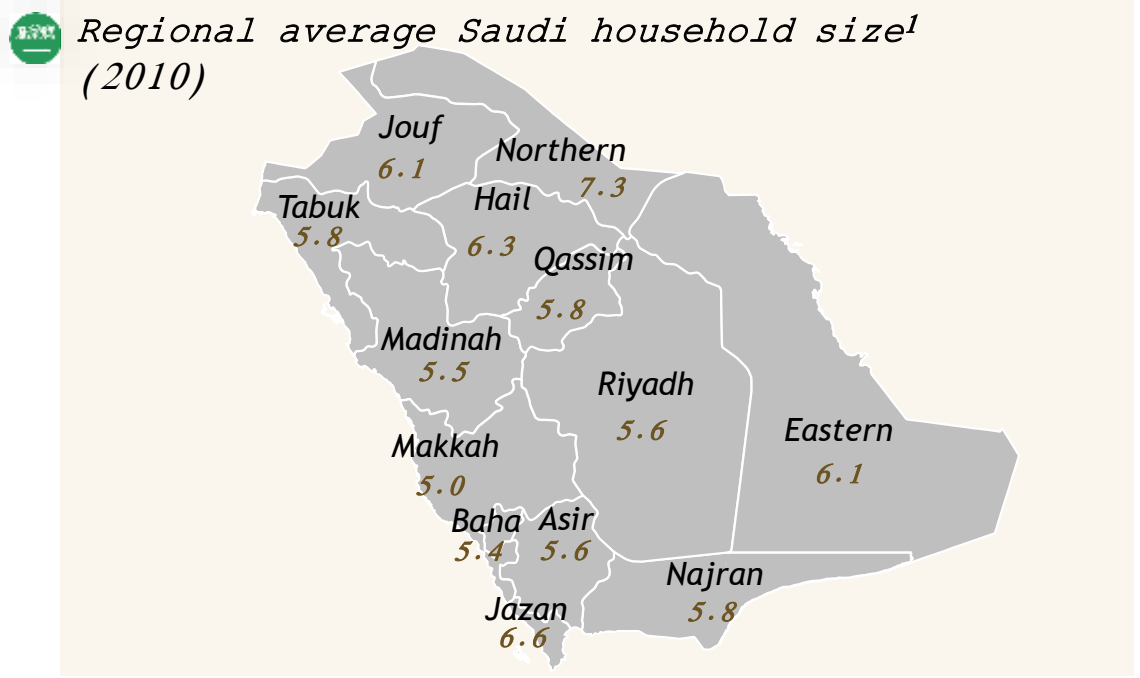


Saudi is committed to achieve the Sustainable Development Goals by 2030 which sets targets across economic, social, and environmental dimensions that relate to and impact families




Today, ~5.5 million families live in Saudi with an average size of 5.9 members per Saudi household


Total Population (Mn, 2020)	Number of households (Mn, 2015)	Average Saudi household size (2017)
~34	~5.46	5.9




Key insights about families in Saudi

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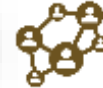
They have many members

 - ~59% households are inter-generational⁴
 - In up to ~10% of households a domestic worker lives as part of the household^{1,4}
 - Strong ties with extended family & tribe
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They are diverse

 - Substantial differences in amongst households with respect to education, income and size across regions
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They are young

 - ~45% of Saudis are below the age of 29
 - 66% of ever-married Saudis get married at the age 24 or below
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They have different compositions

 - 7% of ever-married Saudis have been married more than once
 - ~2% of children live in separated or divorced households²
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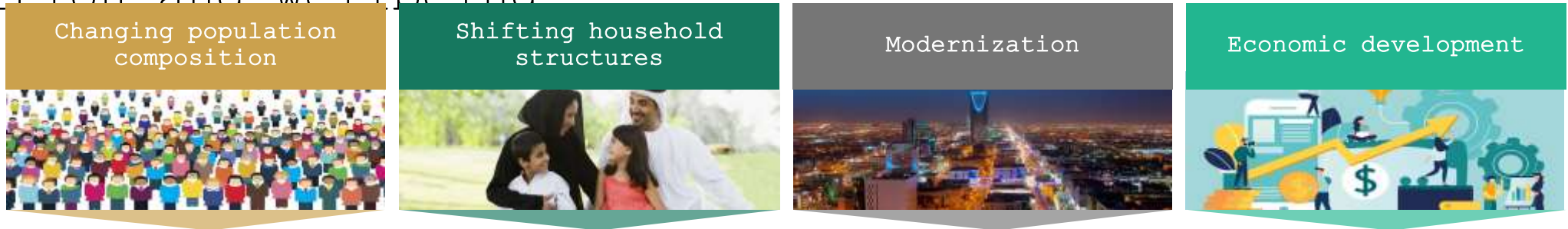
They are in many cases expat-families

 - ~ 1.96mn households in Saudi are expat households (~36% of total households in Saudi)

1. 2010 Gastat census data (latest available data for information); 2. 2016 Gastat demographic Survey children under 18
 3. 2007-2017 Gastat Population Characteristics surveys; 4. Available data only allows estimation of potential households (i.e. "up to")
 Source: Family Affairs Council, Kearney, Worldbank, General Statistics Authority

The development KSA is witnessing presents many opportunities and challenges that impact the family's role, composition and wellbeing

Key trends in Saudi related to families



Key implications

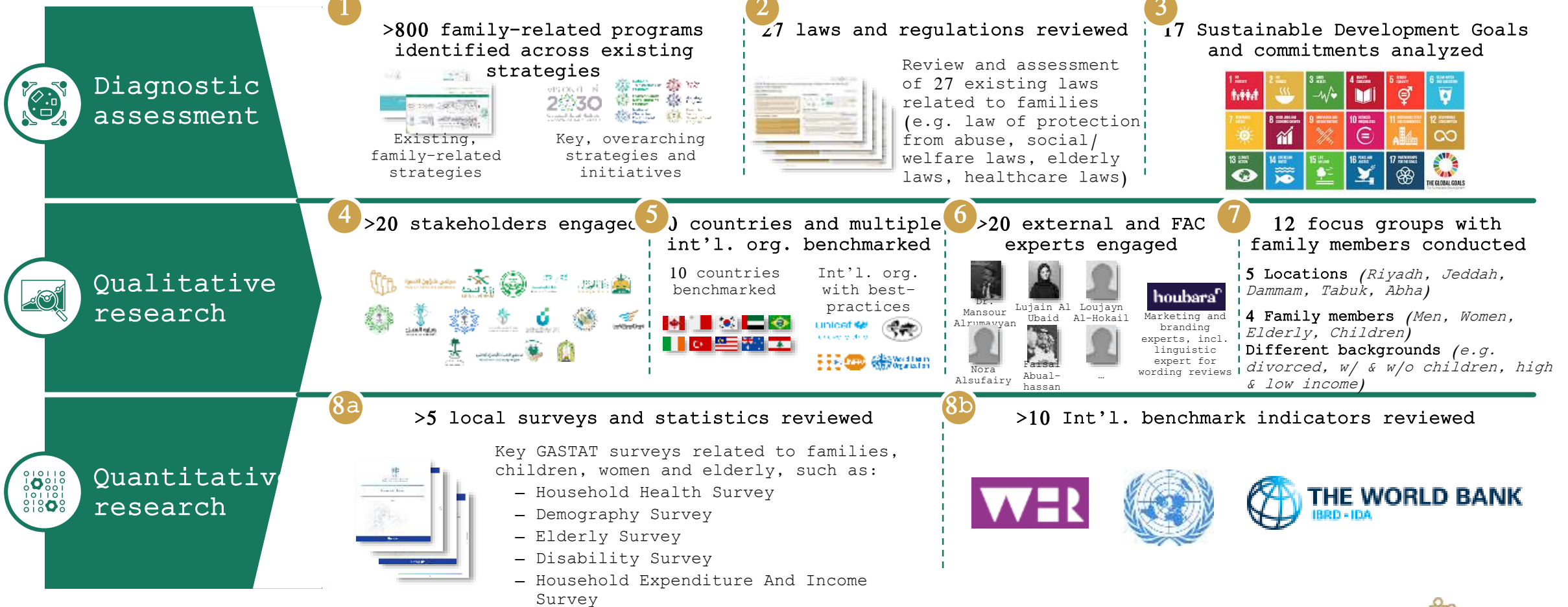
<p>Increasing working aged population</p> <ul style="list-style-type: none"> - Economic growth potential by the current demographic dividend stage resulting from the high working population & decreasing fertility and mortality rates <p>72% of the population are between 15-64 in 2020⁷</p>	<p>Decreasing household sizes</p> <ul style="list-style-type: none"> - Growing awareness of family planning practices and its health consequences - Increased understanding of cost and time associated with children upbringing <p>~45% decrease in fertility rate from 2000 to 2020⁴</p>	<p>Changing sociological characteristics</p> <ul style="list-style-type: none"> - Sectorial reforms are undergoing including entertainment & leisure - Empowerment of women in all fronts (lifting women driving ban, removing male guardian, etc.) <p>~18% increase in women labor force participation from 2000 to 2019⁶</p>	<p>Enabling opportunities</p> <ul style="list-style-type: none"> - Rise in GDP per capita due to enhanced productivity resulting from investments in health, education and employment - New labour laws impose quotas for companies to hire Saudis <p>~14% decline in youth unemployment rate in one year from 2017 to 2018²</p>
<p>Growing elderly population</p> <ul style="list-style-type: none"> - Number of people claiming pension benefits will rise due to the increase in elderly population - Growing burden on healthcare government expenditure <p>-34% forecasted increase in the dependency ratio to from 2020 to 2050⁵</p>	<p>Rising divorce rates</p> <ul style="list-style-type: none"> - Lack of family and marriage counselling services - Threat of disintegration of the family <p>~25% increase in divorces adjusted for population growth from 2007 to 2017¹</p>	<p>Expanding urbanization</p> <ul style="list-style-type: none"> - Stressed infrastructure and utilization of services - Risk on health due to pollution and overcrowded living conditions - Increased internal migration and international labor migration <p>84% of the population live in cities in 2020³</p>	<p>Increasing cost of living</p> <ul style="list-style-type: none"> - Limited savings practices and products for families - Challenges upbringing and maintain quality of life for families - Decreased subsidies on oil prices <p>~3.14% average growth rate of CPI in KSA</p>

1. 2007-2017 Gastat Population Characteristics surveys 2. Jadwa Saudi labor market update 2018 (youth 20-24 years old) 3. Statista - 84% of the population live in cities (2020) 4. United Nations 5. 2. Ratio of dependents (people <15 or >64) to share of dependents per 100 working-age individuals 6. World Bank statistics (% of total labor force) 7. Trend statistical report 2020
 Source: Desk Research, Gastat, WorldBank, Statista, United Nations, Family Affairs Council, Kearney

The development of the National Family Strategy was informed through multiple sources and information

Assessment

Key sources and information leveraged

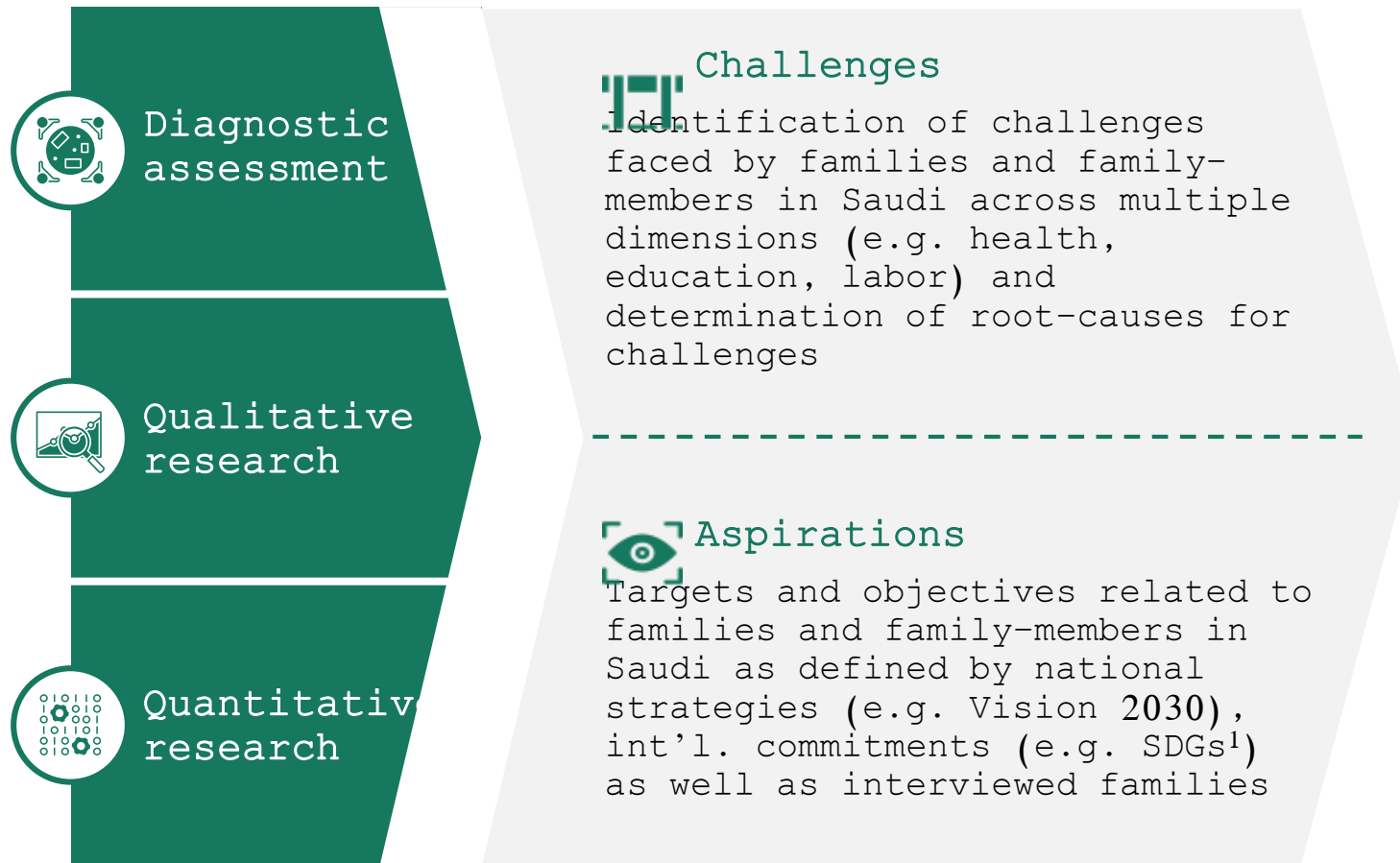


The National Family Strategy is based on key challenges as well as aspirations that were identified through the assessment

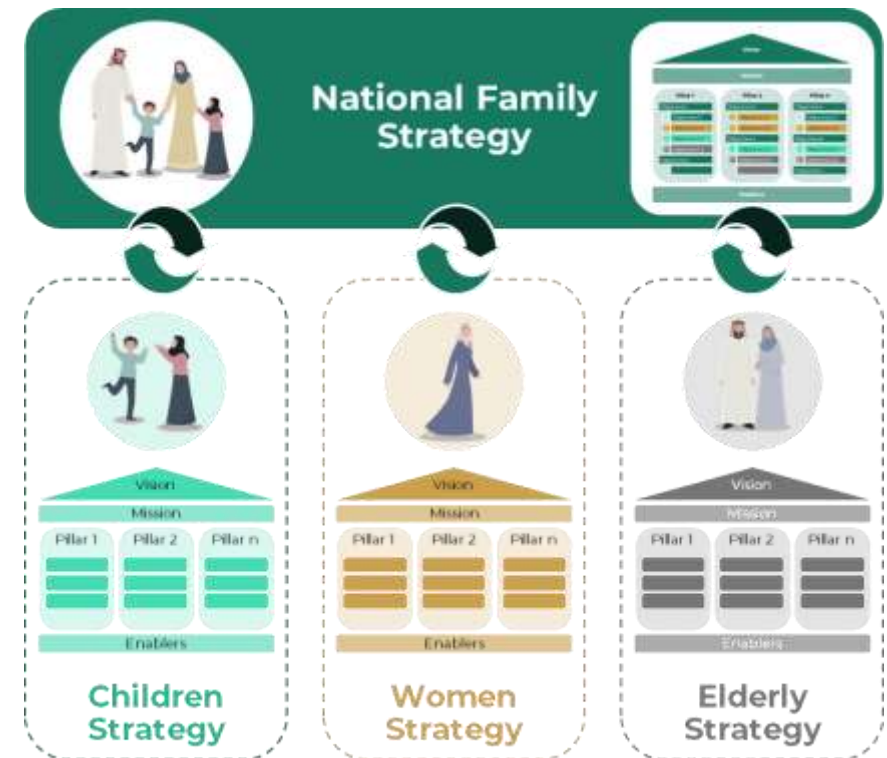
Assessment

Evidence and key findings

Output

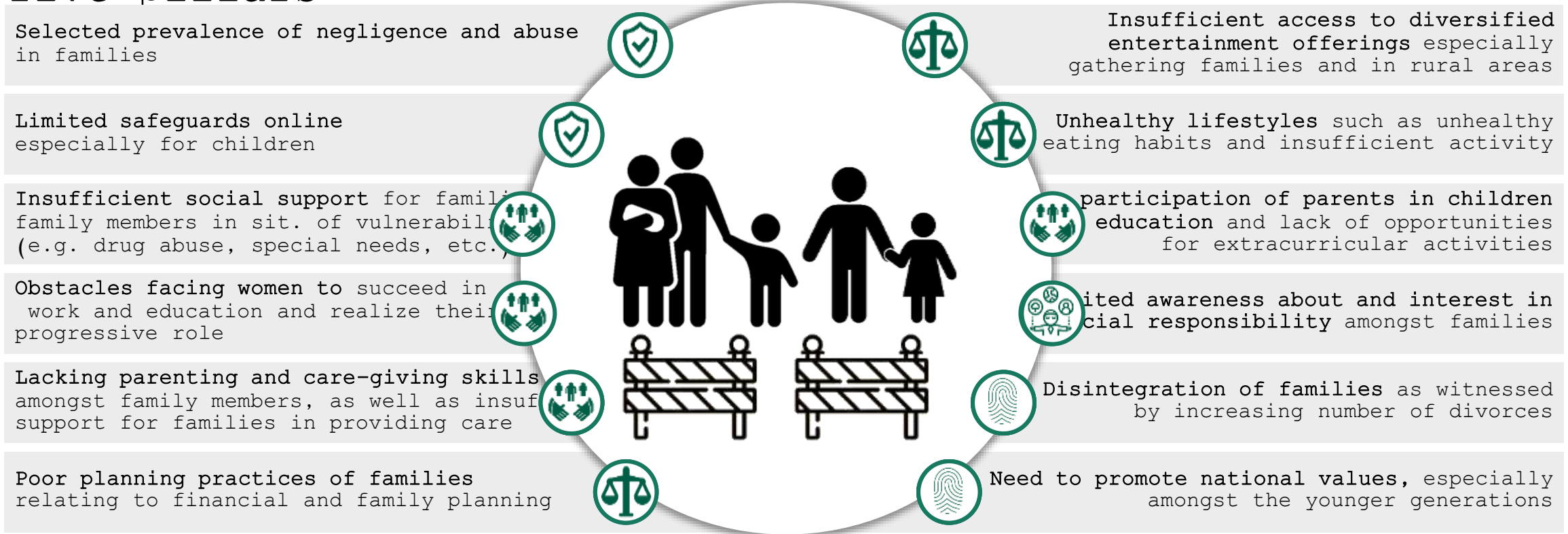


National Family Strategy and supporting, family-member-specific strategies



1. Sustainable Development Goals
Source: Family Affairs Council, Kearney

Based on the baseline assessment, we identified the challenges that families and family members face across the five pillars



Root causes



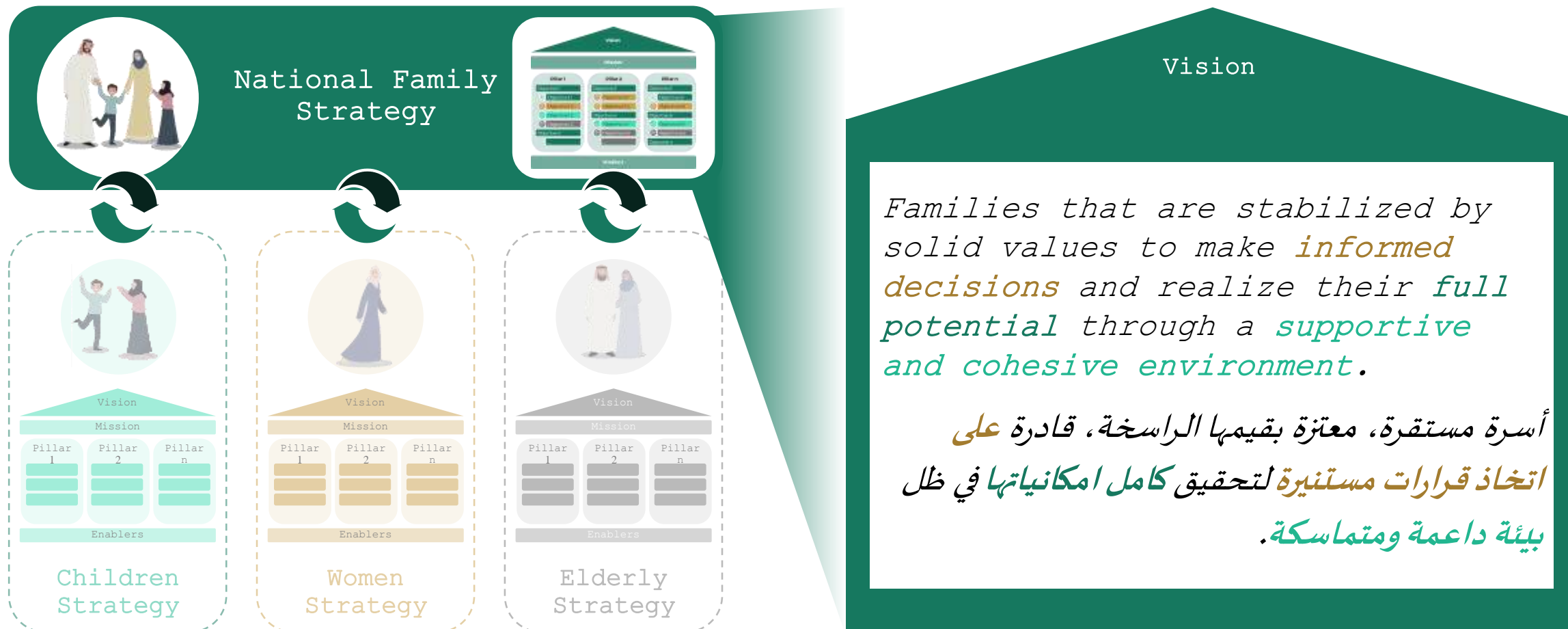
Based on the challenges and aspirations, we developed 5 L1 objectives for the national family strategy across the 5 pillars



The strategy is structured along five pillars which collectively address the key topics relevant to families in Saudi

Pillar	Safety and Security	Equality and Inclusiveness	Stability and Prosperity	Social Responsibility	Identity
Definition	<i>Establish an environment that meets the safety and security needs of families and protects them from harm</i>	<i>Ensure that every family member feels cared for and included within society and has equal access to services and resources</i>	<i>Provide opportunities of prosperous standards of living to all members of families</i>	<i>Enhance accountability of every family member towards their contribution to their community</i>	<i>Empower strong family beliefs, attitudes, ideals, as well as Islamic and cultural values across all members of families in Saudi Arabia</i>
					

The vision for the National Family Strategy focuses on enabling families to make informed decisions to realize their full potential



The mission of the National Family Strategy centers around optimizing human capital outcomes



To enable the family in light of the changing social system, the National Family Strategy has been developed



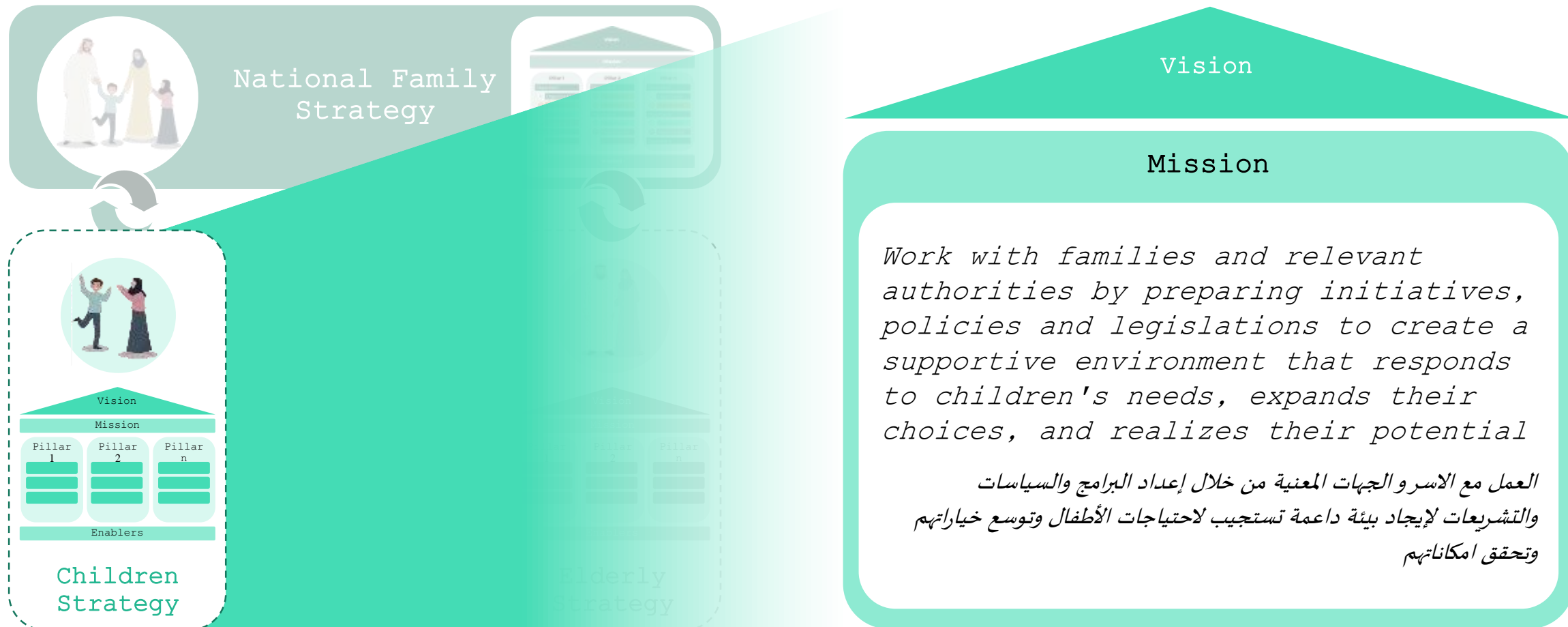
- A comprehensive strategy for all family members, measurable objectives, ambitious targets and implementation initiatives

- Strategies that serve different family groups, in line with the National Family Strategy
- According to benchmarks, the National Family Strategies is accompanied by strategies directed for children, women and the elderly











The vision of the children strategy focuses on achieving an environment that enables children to realize their full potential



The mission of the children strategy focuses on creating the supportive environment by working with relevant stakeholders



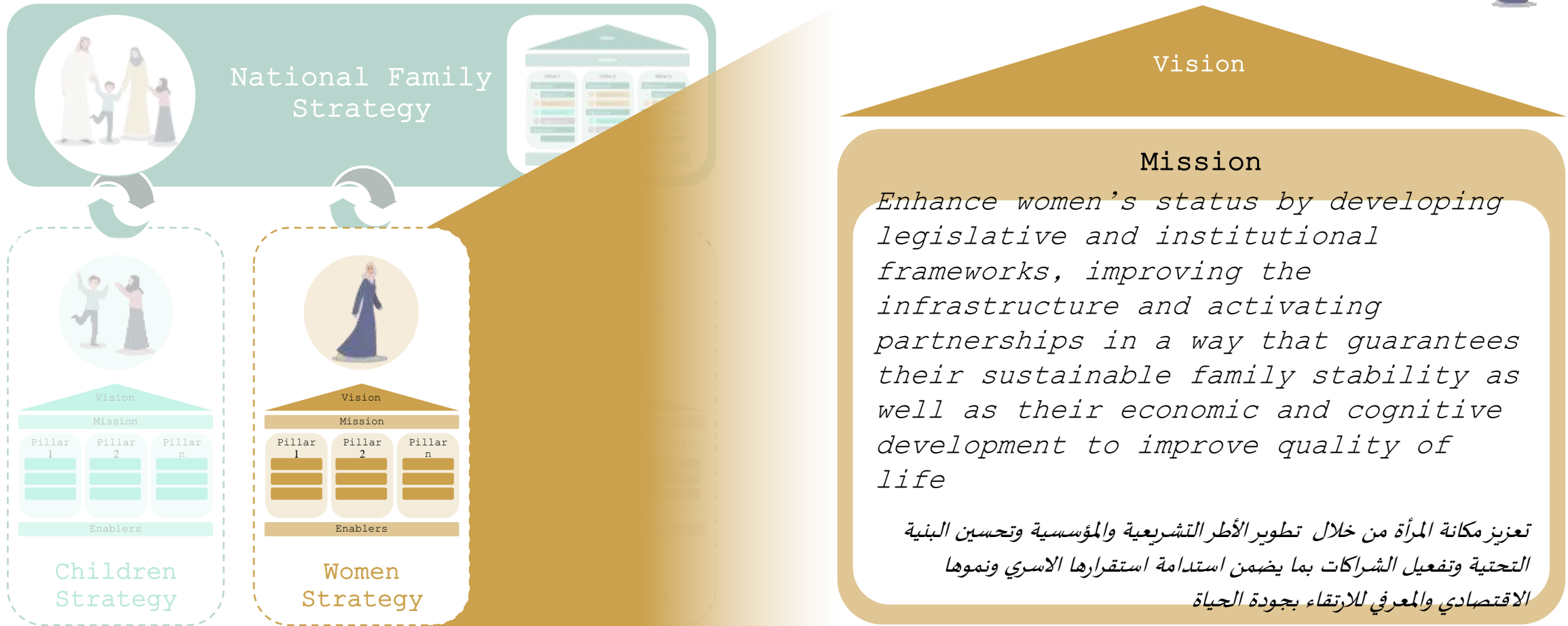
In summary, 10 objectives are defined for the Children Strategy across the five pillars

<p>1.2</p> <p>Protect children from all forms of violence, abuse and harm by securing their safety in their surrounding and online</p> 	<p>2.7</p> <p>Enable children in situations of vulnerability to lead a fulfilling life by enhancing and expanding the social welfare benefits and services for them and their families</p> 	<p>3.7</p> <p>Prepare children for career success by providing educational and career guidance initiatives</p> 	<p>5.2</p> <p>Promote a national identity among future generations by strengthening their connection to the history of Saudi Arabia, its heritage, and values as well as its Arabic language</p> 
<p>2.5</p> <p>Strengthen early childhood development by providing enrollment opportunities in kindergartens & nurseries in all regions</p> 	<p>3.5</p> <p>Enable children to make informed decisions on personal finances, educ. and career dev'l. as well as marriage and family planning by equipping them with the required knowledge, skills and tools</p> 	<p>3.8</p> <p>Motivate children to pick up a healthy lifestyle by encouraging healthy and discouraging addictive habits</p> 	
<p>2.6</p> <p>Support childhood and adolescence development by enhancing extracurricular development</p> 	<p>3.6</p> <p>Satisfy children's entertainment needs by widening accessible choices for them indoors and outdoors</p> 	<p>4.2</p> <p>Raise children's awareness towards their social responsibility by integrating social responsibility concepts and activities in schools</p> 	

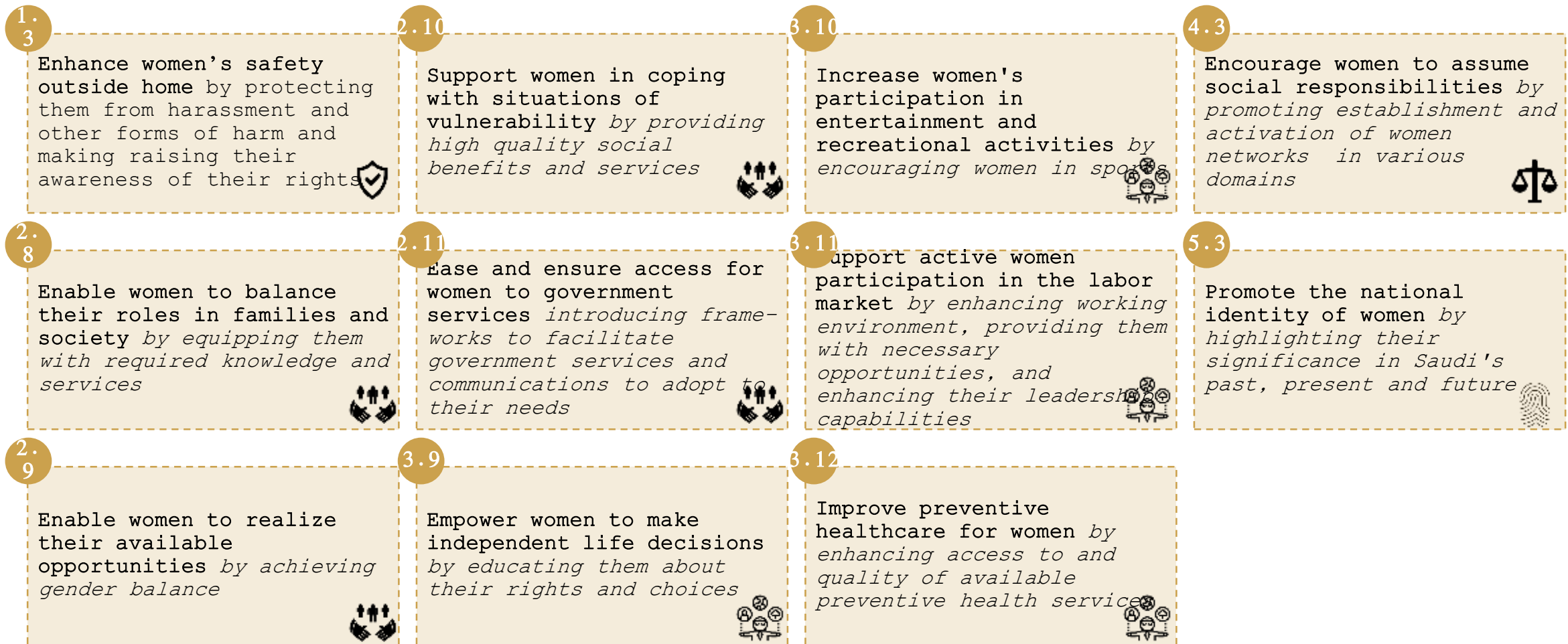
The aligned vision for the women strategy centers around empowered Saudi women locally and internationally



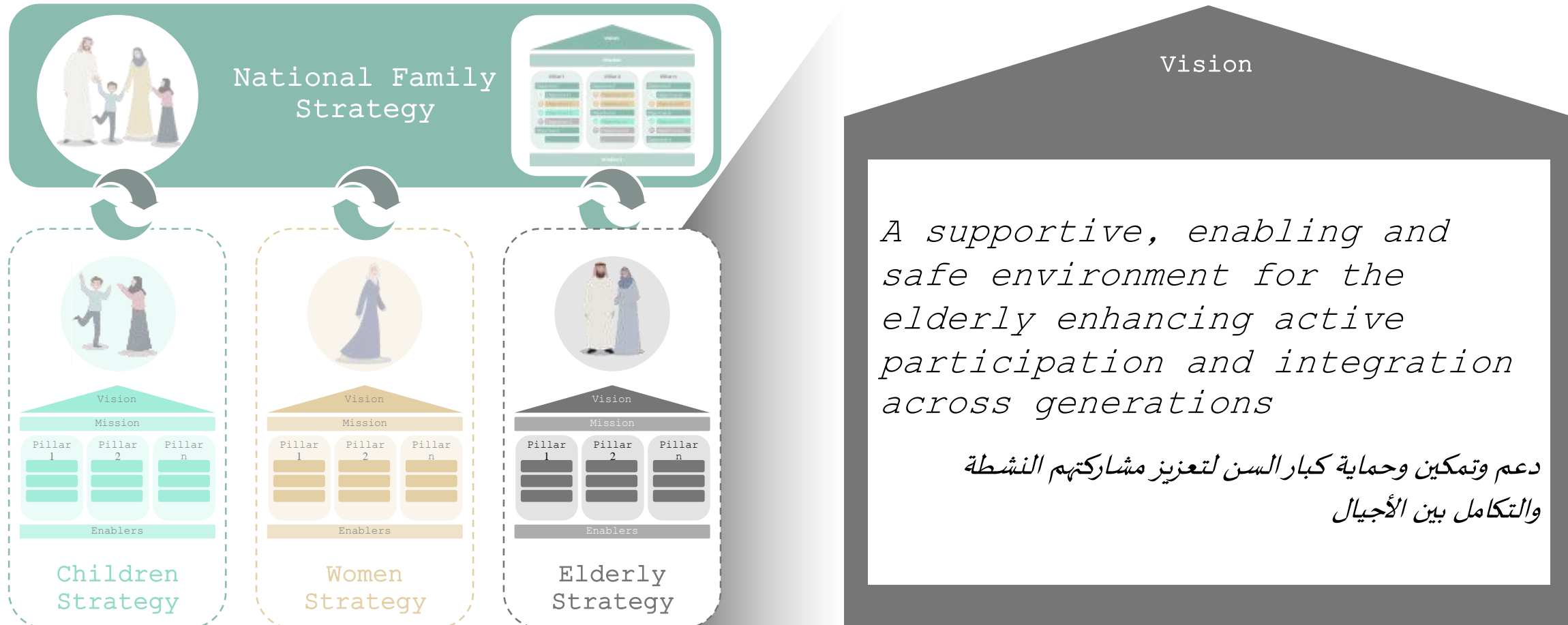
The mission of the women strategies focuses on developing a supportive and enabling environment for women



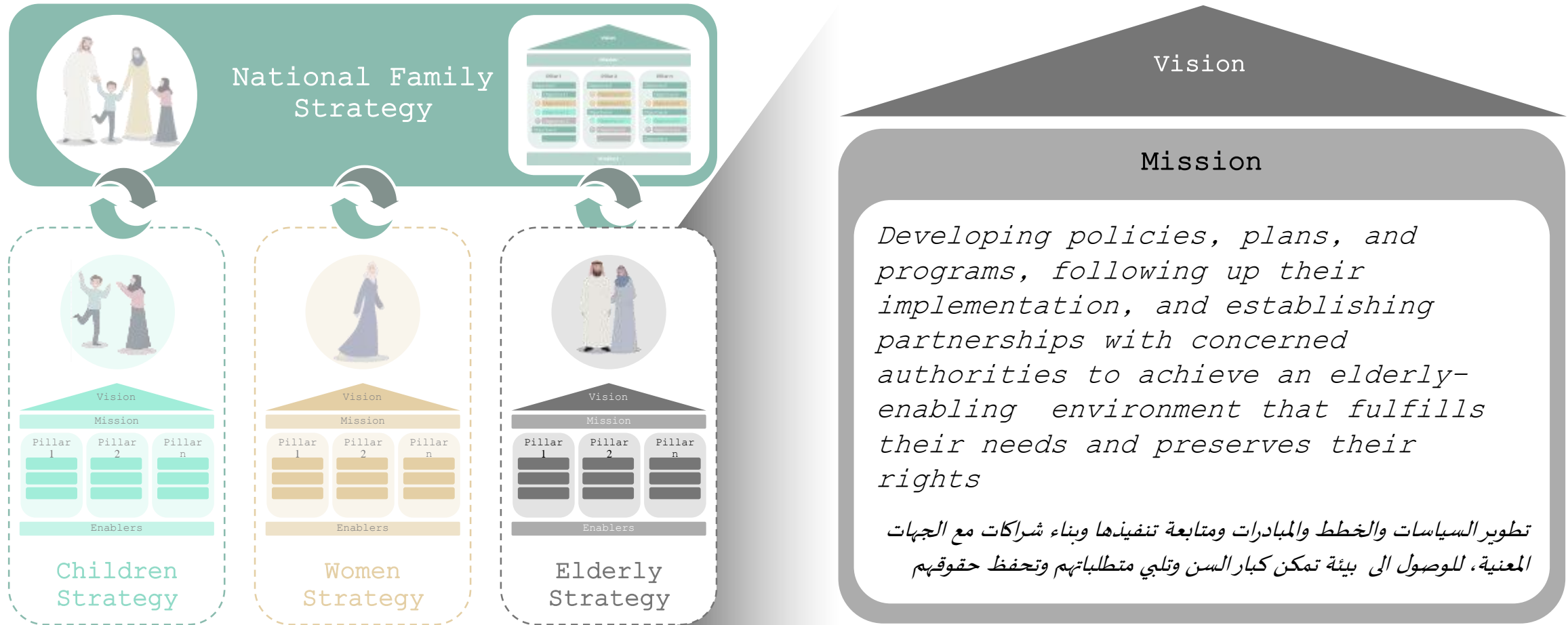
In summary, 11 objectives are defined for the Women Strategy across the five pillars



The vision of the elderly strategy focuses on enabling elderly to lead an active and integrated life



The mission of the elderly strategy focuses on creating an enabling environment for elderly

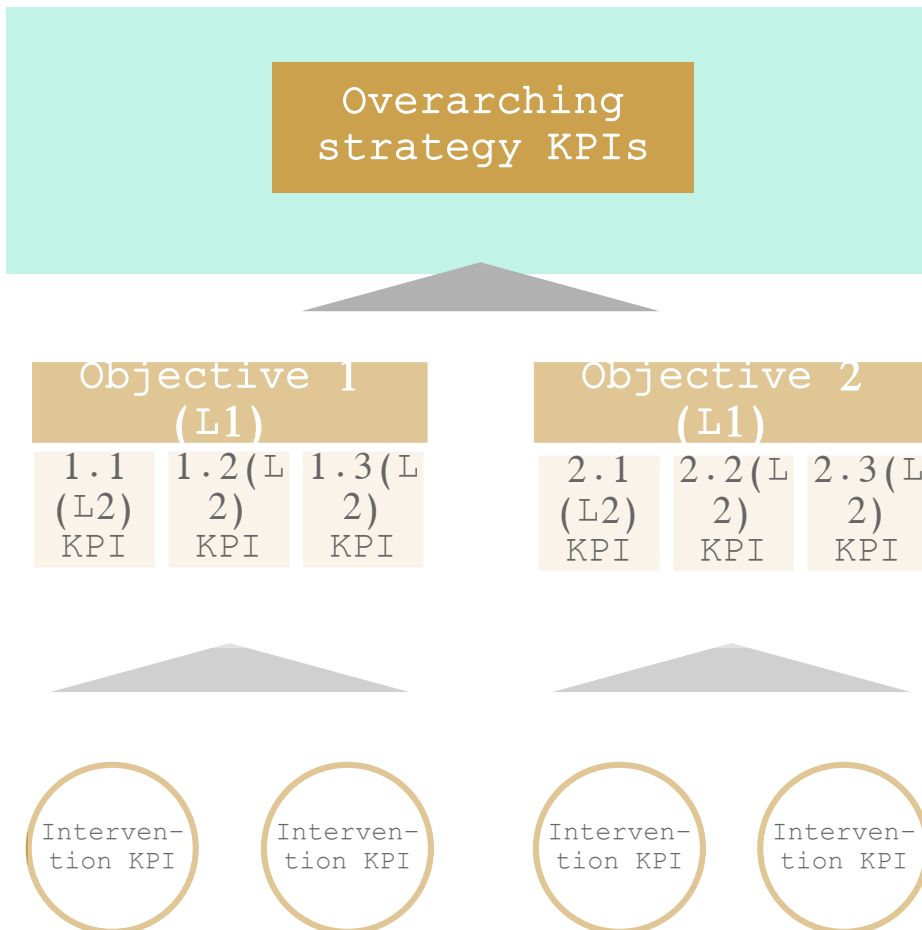


Based on the challenges and aspirations, we defined 11 objectives for the Elderly Strategy across the five pillars



We identified different levels of KPI

KPI logic



Explanation

Overarching strategy KPIs

Indicators extracted from global indices based on indices' sub-components as they relate to the different strategies' objectives

Objective-based KPIs

Metrics that measure the degree to which an objective will be achieved and that will ultimately lead to outcomes relating to the family or family members

Intervention-level KPI














Indicators that measure the extent that a topic/issue has been addressed and that will contribute to the achievement of objective-based KPIs

Part of program charters

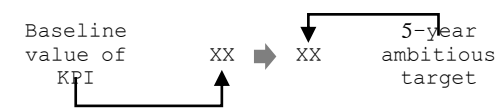


In summary, for each strategy multiple KPI and related targets were set

Strategy Relevant KPI across strategies matching themes

 Family	 Global Competitiveness Index Critical thinking in teaching (1 = Worst score; 7 = Best score) 4.29 → 5.31 Digital skills among active population (1 = Worst score; 7 = Best score) 5.32 → 5.33 Skillset of graduates (1 = Worst score; 7 = Best score) 4.60 → 5.18	 Social Progress Index Perceived criminality (1=low; 5=high) 3 → 2 Access to quality healthcare (0=unequal; 4=equal) 3.19 → 3.77 Premature deaths from non-communicable diseases (deaths/100k people) 306.24 → 253.81	 World Happiness Index Satisfaction with freedom to make life choices (0 = Worst Score, 1 = Best Score) 0.814 → 0.952 Behaviors (donating, volunteer, etc.) 37% → 47% Social support from relatives and friends (0 = Worst Score; 1 = Best Score) 0.87 → 0.90	
	 Children	 Human Capital Index Expected years of school 16.9 → 20.4 Harmonized test scores (TIMSS 300-625) 407 → 441	Learning adjusted years of school 8.1 → 9.6 Stunting rates of children under 5 9% → 6.6%	 PISA Index % of students who claim they were frequently bullied by students 7% → 6.89% Average PISA test scores 386 → 444 % of students' parents engaged in their child's school affairs 42% → 54.78%
	 Women	 Women, Business, and Law Index Score on pay (e.g. equal pay, night hours, etc.) 25 → 75 Score on marriage (e.g. legal provisions for domestic violence, divorce, etc.) 60 → 100	 Global Gender Index Score on parenthood (e.g. paid leave, etc.) 40 → 80 Score on economic participation and opportunity sub-index 0.34 → 0.43 Score on educational attainment sub-index 0.98 → 1.00	Score on health and survival sub-index 0.96 → 0.98 Prevalence of modern contraceptive use with modern methods 20.8% → 59%
 Elderly	 Global Age Watch Index % of people aged 50+ who feel safe walking alone 84% → 99% % of people aged 50+ who are satisfied with public transport 67% → 84%	% of people 50+ who have family and friends to count on when in need of help 83% → 90%	 Age-friendly cities % older people who report engaging in volunteer activity in the last month 7.5% → 9.9% Number of older persons with personal care or assistance needs receiving formal (public or private) home-based services 2% → 4%	





Source: Family Affairs Council; Kearney

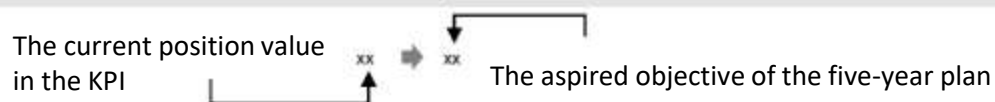


Key performance indicators (KPIs) are defined at the target level

Not inclusive

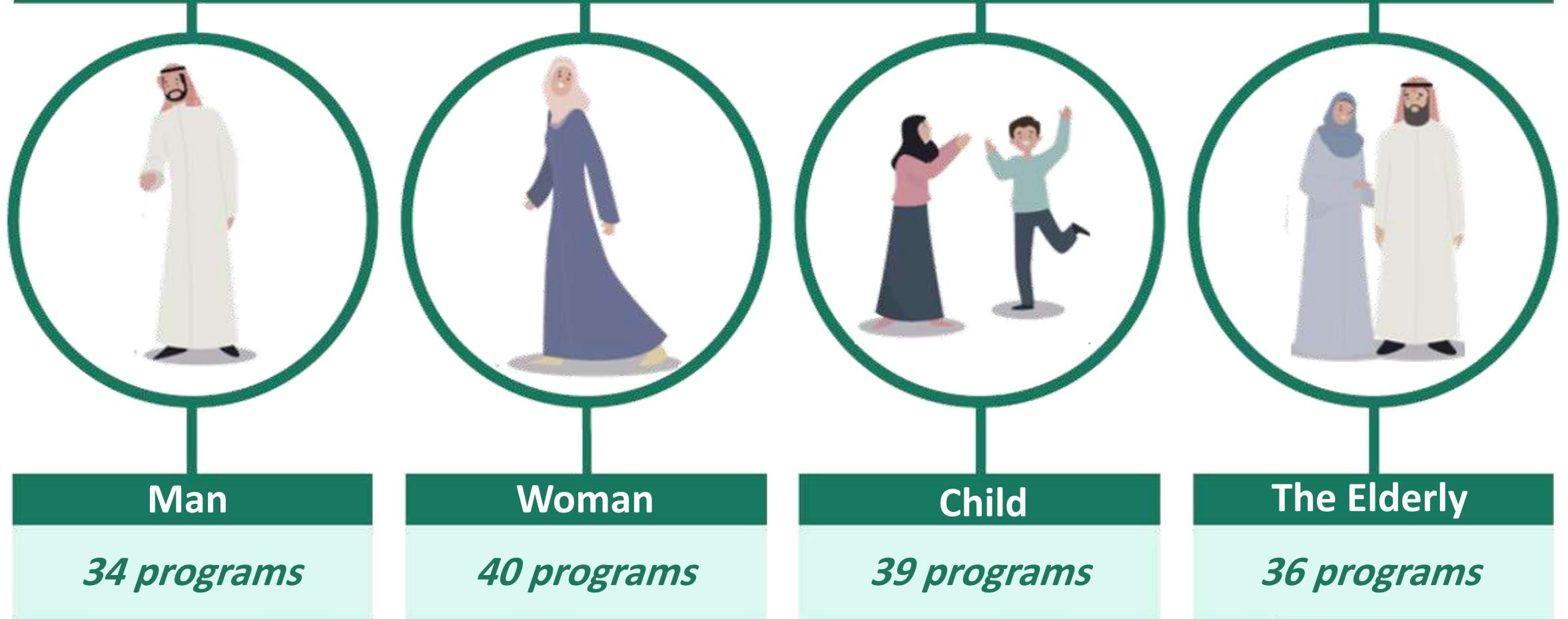
The strategy KPIs related to the objectives

 Family	Objective 1 - safety and security The perceived criminal acts (1 = low, 5 = high) 3 → 2	Objective 3 - Equality and inclusiveness The level of inequality in education (%) (i.e. inequality in the distribution of school years) %18 → %7	Objective 6 - Stability and prosperity The prevalence of using the modern contraceptive methods %20.8 → %59
	Objective 5 - Equality and inclusiveness Ratio of population who feel safe to walk alone at night (1% = The worst degree, 100% = the best degree) %81 → %93	Objective 5 - Equality and inclusiveness Government Effectiveness Index (-2.5 = The worst degree, 2.5 = the best degree) 0.32 → 1.81	Objective 9 - Equality and inclusiveness Obtain good health care (0 = unequal, 4 = equal) 3.19 → 3.19
 Child	Objective 1 - safety and security Number of incidents of physical abuse, sexual assault and negligence among children for every 1,000 children 0.074 → 0.037	Objective 2 - Equality and inclusiveness Ratio of children of pre-primary age who are enrolled in pre-primary education %21 → %35	Objective 8 - Stability and prosperity The percentage of students 'parents' participation rate in school %42 → %54.78
	Ratio of students who claim to have been bullied often by students %7 → %6.89	Ratio of children between 0-59 months old who suffer from stunting %9 → %6.6	Skills of high school graduates (grade 1 – 7) 4.1 → 5.2
 Woman	Objective 1 - safety and security Ratio of women who experienced physical and / or sexual violence by a current or former intimate partner in the last 12 months %6 → %3.4	Objective 4 - Equality and inclusiveness Wage assessment (such as the legal provisions for equal pay, night hours, etc.) 25 → 75	Objective 7 - Stability and prosperity Prevalence of insufficient physical activity among females aged 18 years and over (standard estimation of age) %65 → %13.5
	Marriage assessment (such as legal provisions for domestic violence, divorce, etc.) 60 → 100	Objective 7 - Stability and prosperity The difference in gym membership tariffs between women and men 327 → 0	Objective 8 - Stability and prosperity Ratio of the female population according to educational attainment (master's, doctorate, or equivalent education for the age of 25 - 64 years) %29.8 → %32
 The elderly	Objective 3 - Equality and inclusiveness Ratio of people who are over the age of 50 years and satisfied with public transportation %67 → %84	Objective 8 - Stability and prosperity Rate of Education for the elderly (+65) %58 → %84	Objective 9 - Stability and prosperity Average expected age at 60 21 → 24
	% of the population aged 65 and over with a secondary or higher education %22 → %43	Objective 9 - Stability and prosperity Number of doctors for every 10000 persons 5.7 → 12.5	



We ensured that the initiatives of the National Family Strategy cover all family members

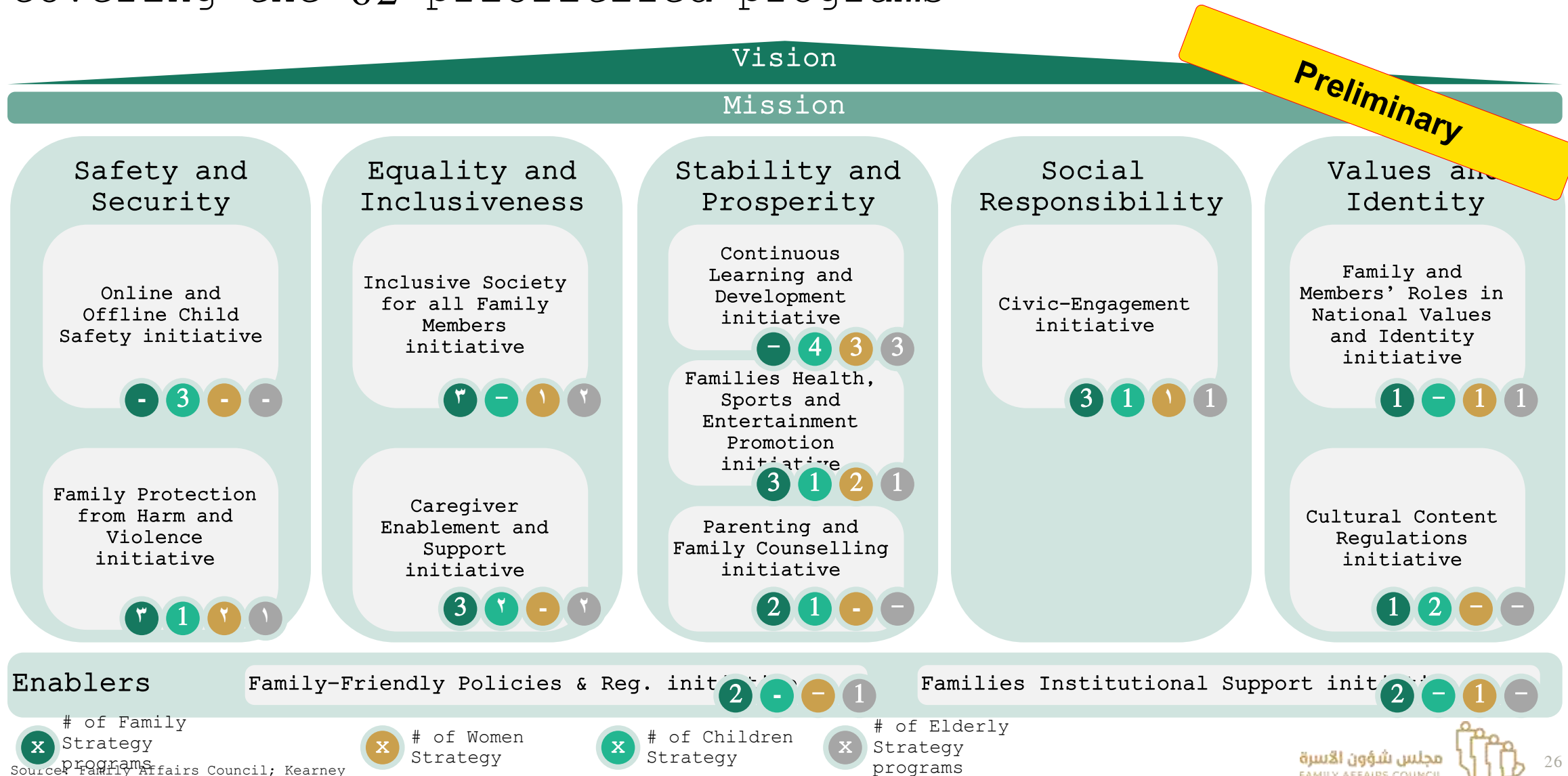
12 initiatives with a wide impact on all family members



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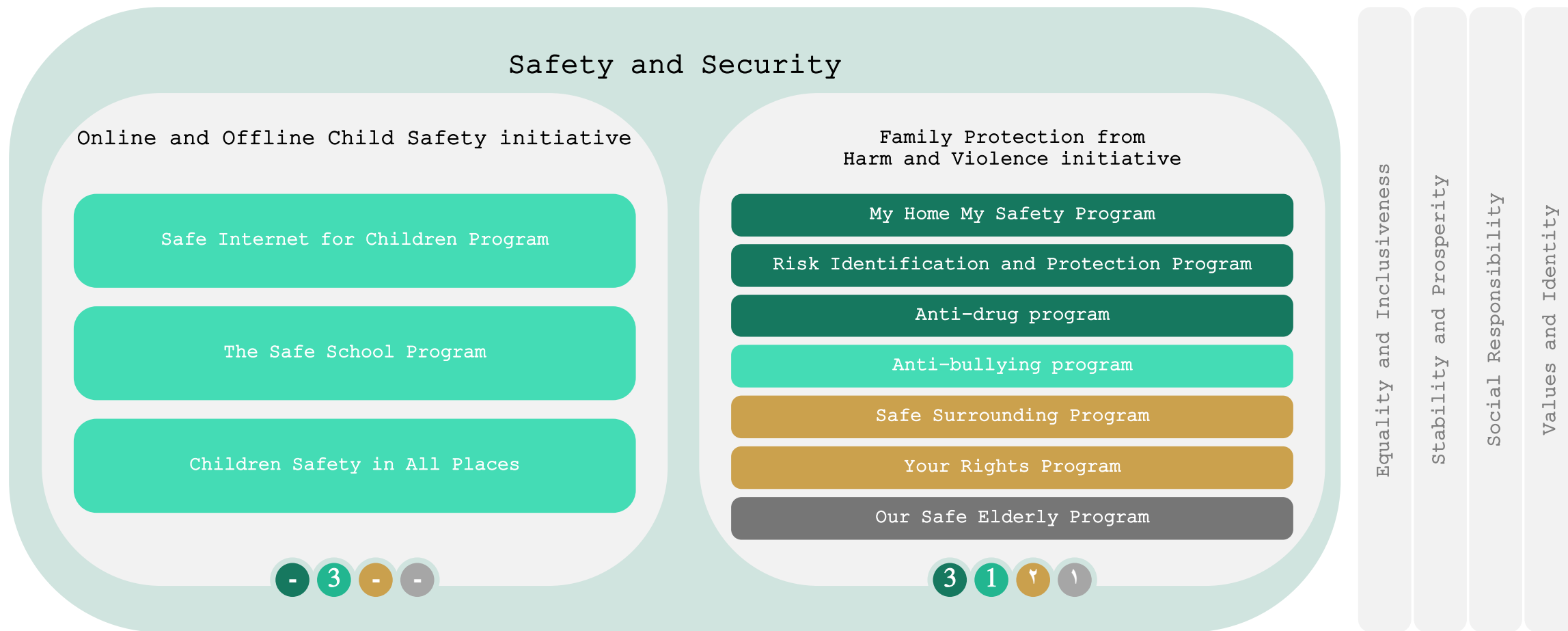
Number of programs with an impact on a family member (out of total of 61 programs)

As such, we developed 12 initiatives across the 5 pillars covering the 62 prioritized programs



Source: Family Affairs Council; Kearney

Safety and Security pillar includes 2 initiatives covering a total of 10 programs



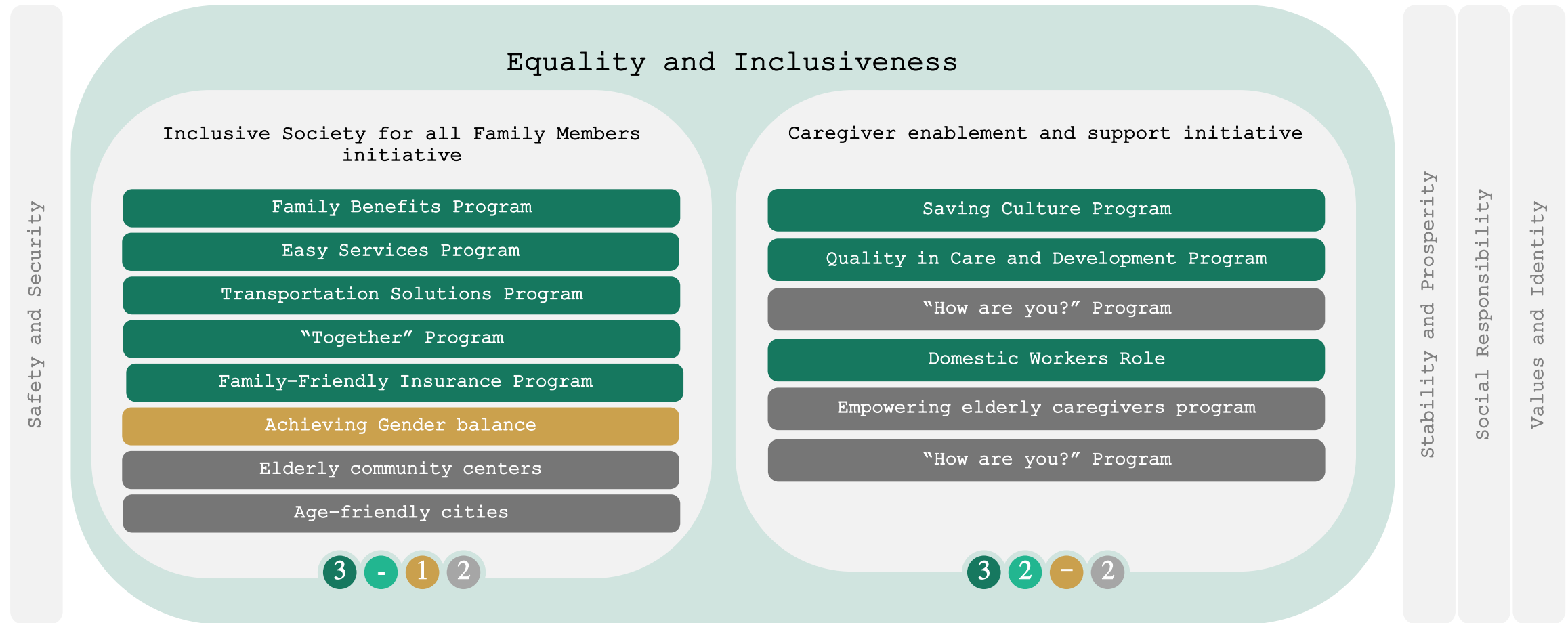
of Family Strategy programs
Source: Family Affairs Council; Kearney

of Women Strategy

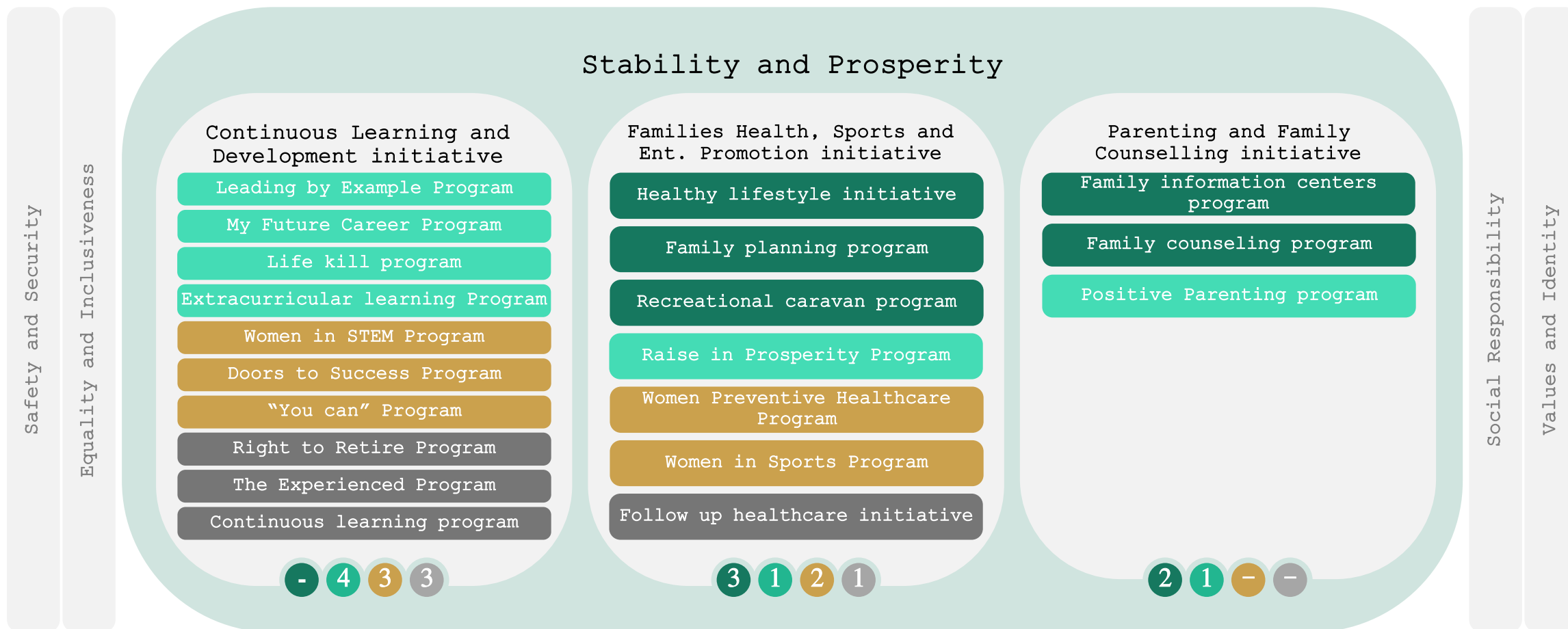
of Children Strategy

of Elderly Strategy programs

Equality and inclusiveness pillar includes 2 initiatives covering a total of 14 programs



Stability and Prosperity pillar includes 3 initiatives covering a total of 20 programs



ⓧ # of Family Strategy programs
ⓧ # of Women Strategy
ⓧ # of Children Strategy
ⓧ # of Elderly Strategy programs

Source: Family Affairs Council; Kearney

Social responsibility pillar includes 1 initiative covering a total of 6 programs

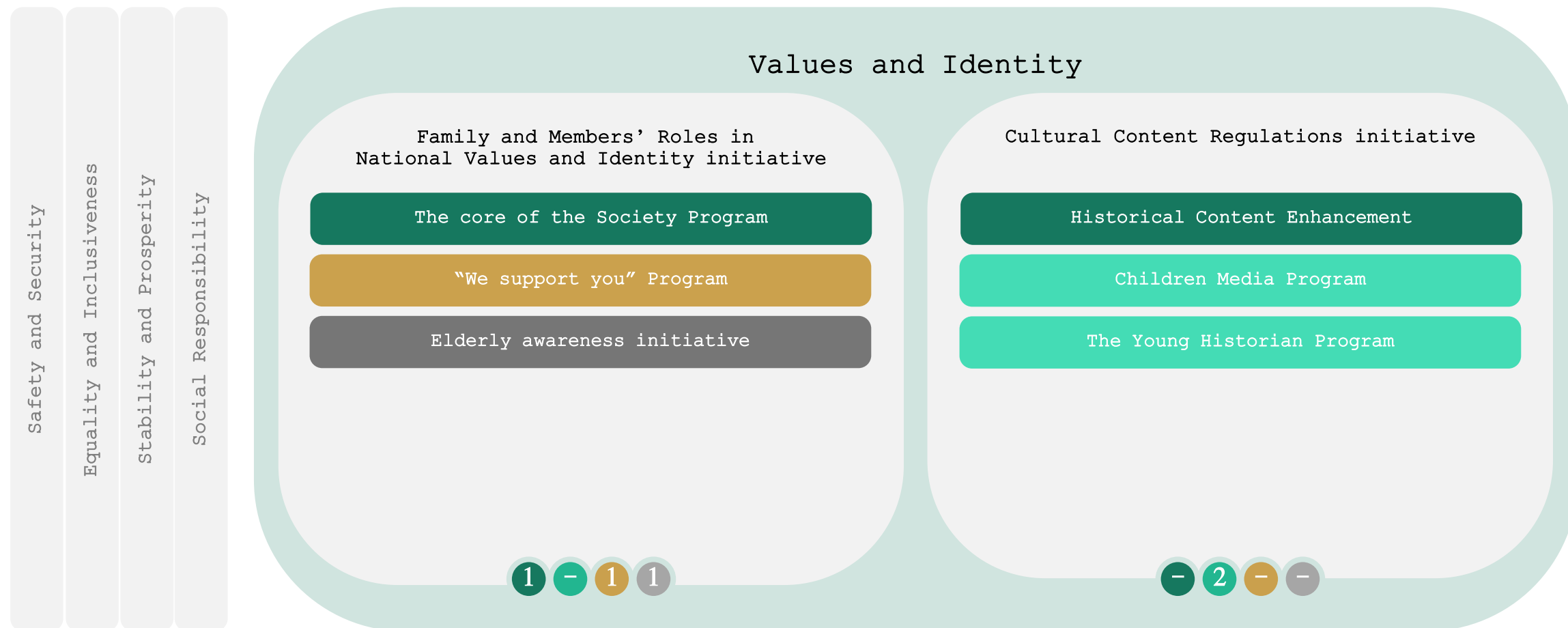


Enablers

- X # of Family Strategy programs
- X # of Women Strategy
- X # of Children Strategy
- X # of Elderly Strategy programs

Source: Family Affairs Council; Kearney

Values and Identity pillar includes 2 initiatives covering a total of 6 programs

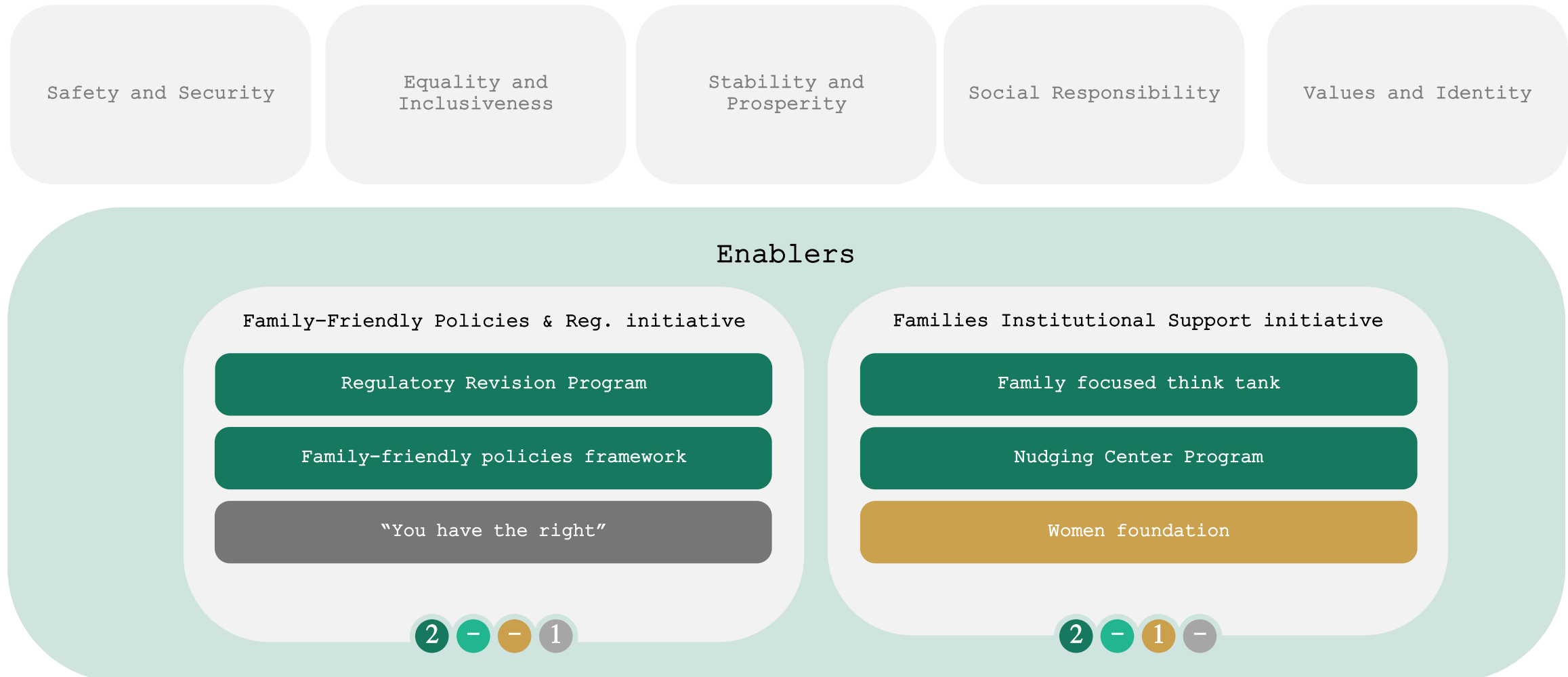


Enablers

- x # of Family Strategy programs
- x # of Women Strategy
- x # of Children Strategy
- x # of Elderly Strategy programs

Source: Family Affairs Council; Kearney

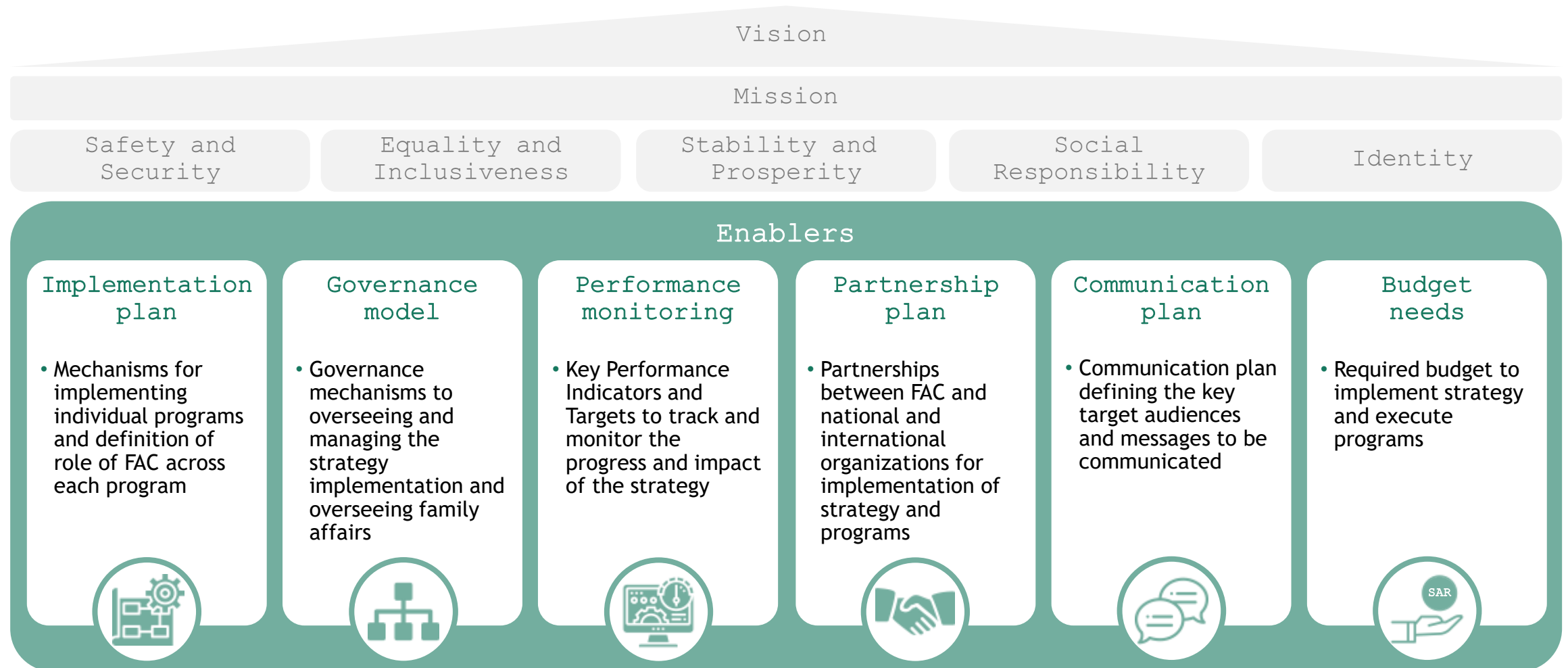
Enablers initiatives include 2 initiatives covering a total of 6 programs



x # of Family Strategy programs
x # of Women Strategy
x # of Children Strategy
x # of Elderly Strategy programs

Source: Family Affairs Council; Kearney

The implementation of the National Family Strategy will be supported by six enablers



Thank You