

Coronavirus Beat

What's next for Saudi Arabia:

Webinar on the new normal after COVID-19



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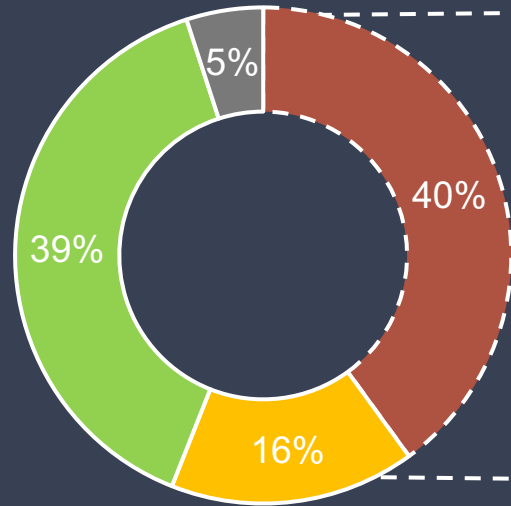
The logo for APCO worldwide is centered in the lower half of the image. It features the word "APCO" in a large, bold, white sans-serif font, with "worldwide" in a smaller, white sans-serif font below it, followed by a registered trademark symbol (®). The background of the entire slide is a dark blue-grey color with a white line-art illustration of a global city skyline at the bottom. The skyline includes various architectural styles, such as modern skyscrapers, domed structures, and classical buildings, representing a diverse range of international locations.

Survey Details

- Research with 503 Saudi Citizens in Saudi Arabia 02.04.20 to 05.04.20
- Research conducted online, questions designed by APCO Worldwide, fielded by Censuswide
- Sample is broadly representative of wider demographics
- Margin of Error: +/- 4 points

Economy: Spending has held up well, some caution anticipated on 'Bounceback'

Reported Spending vs Before Crisis*

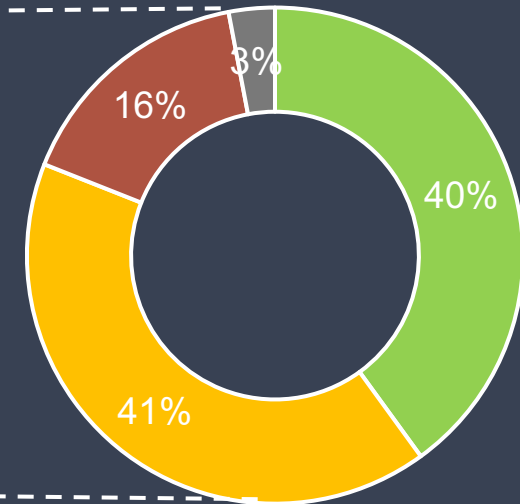


■ Purchasing less ■ Same level ■ Purchasing more ■ Unsure

*Respondents were asked to discount purchasing which is currently unavailable (e.g. foreign travel)

Q1. Which of the following statements best describes your households purchasing at this present time?(In answering this question, please consider only purchases where you still have a choice not those where the option is not available at the moment, such as going abroad on holiday. Please also consider both essential purchases (e.g. food) and non-essential ones)

Projected Bounceback
(All Spending Less)

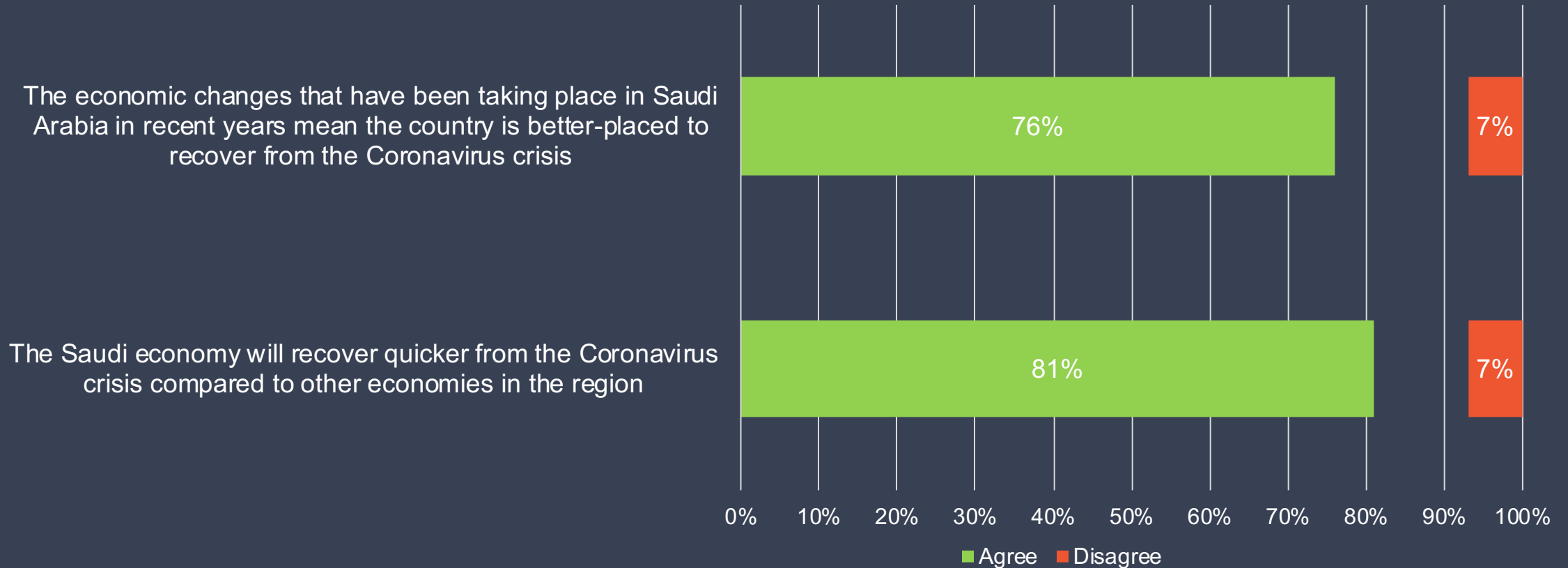


■ Immediately return to normal
■ Wait, then return to normal
■ Purchasing will take a long time to return to normal
■ Don't know / None of the above

Q2. Now, thinking ahead to when life seems to be returning to normal, which of the following do you think are most likely?

Economy: Reform seen as having made KSA economy more resilient; Confidence Saudi economy in stronger shape than rest of region

Balance of Opinion – Agree vs Disagree*

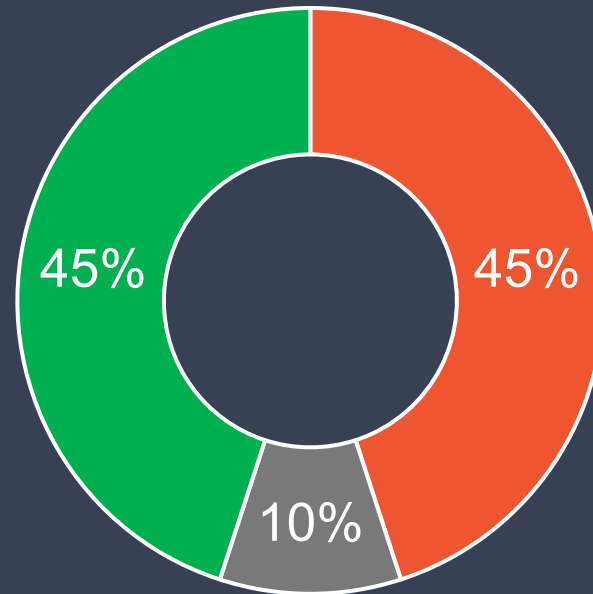


*Clear space: those who neither agree nor disagree, or have no opinion

Economy: Views on 120bn Riyal stimulus are split: There may be value in stronger communication on the individual benefits it confers

% Selecting each option

“By investing in supporting the economy, the Government is taking the best route in supporting individuals such as myself and my family”



“I expect the Government to do more to help individuals such as myself and my family”

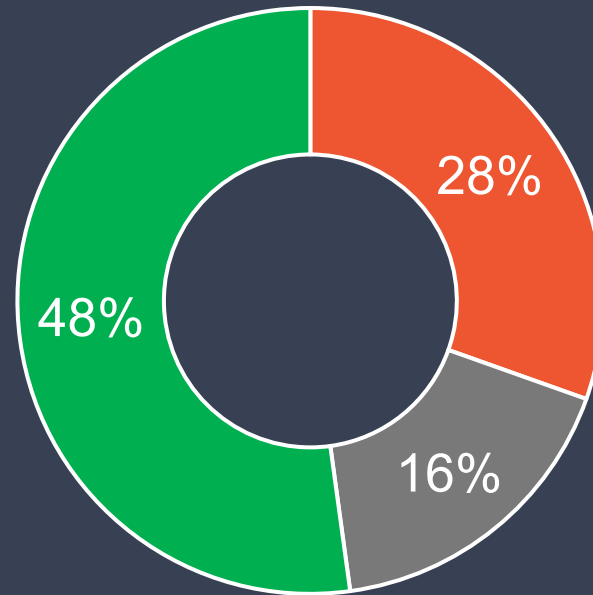
“Don't know / other opinion”

Q4. The Government has recently announced that 120 billion riyals will be invested into the health sector and the economy (e.g. banks, financial institutions, small and medium enterprises). Thinking about this, which of the following statements comes closest to your view?

Urban expansion: invest in preparedness, rather than slow down

% Selecting each option

“We should not slow down the growth of large cities in future, but should invest in making sure they are as well-prepared as possible to deal with future pandemics”



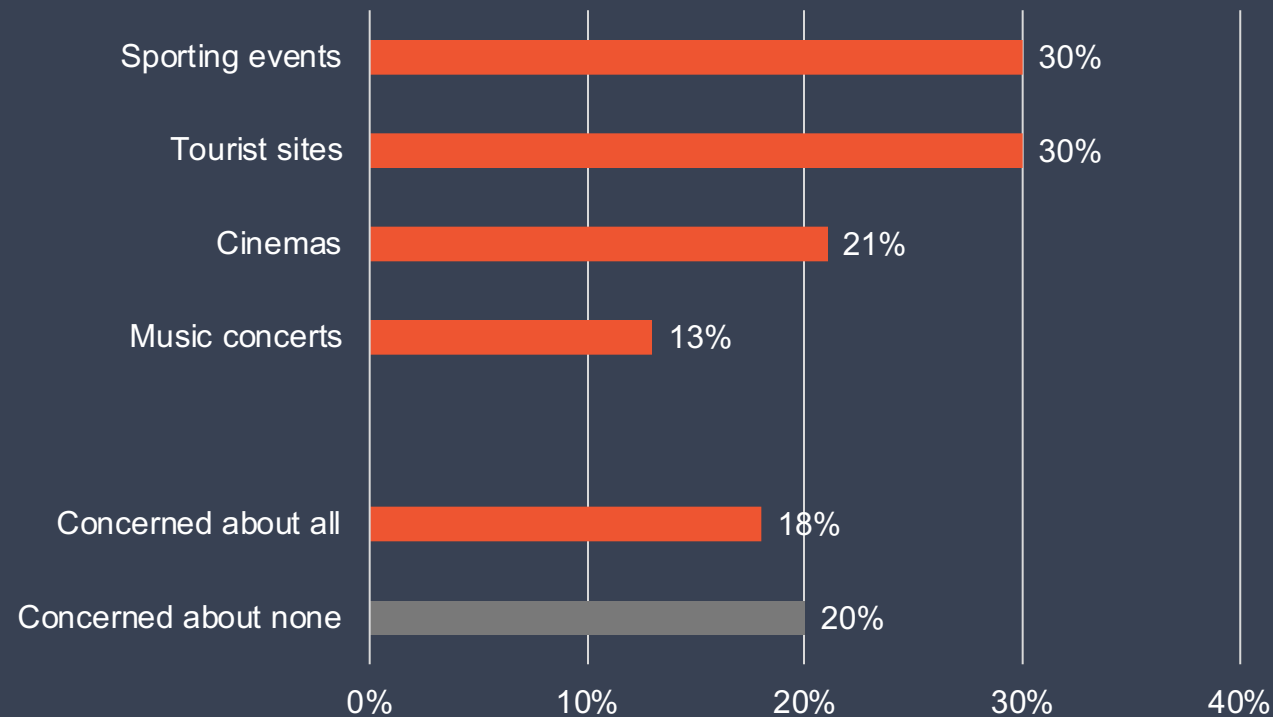
“We should take the Coronavirus crisis as a warning to slow down the growth of large cities in future”

“Do neither / something else”

Q10. In countries around the world, including Saudi Arabia, Coronavirus has spread quicker in large, densely populated cities . Thinking about this, which of the following statements comes closest to your own opinion about how Saudi Arabia should respond after the Coronavirus crisis has passed?

Culture: Long-term impact on sporting events, tourism biggest causes for concern

% Concerned about long-term negative impacts of restrictions on... (if all impacted equally)



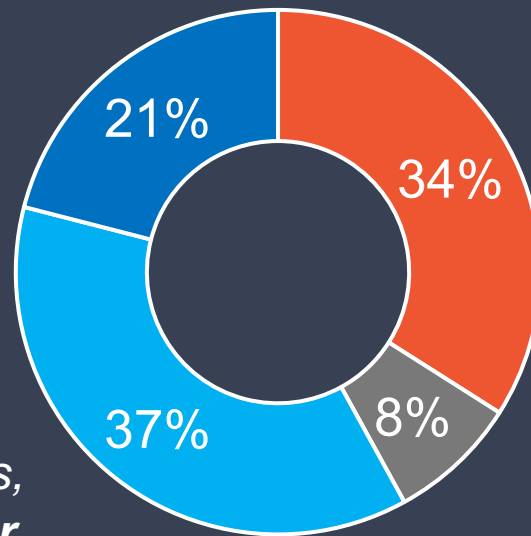
Q5. If all of the following events were to be negatively impacted in the long-term due to the current restrictions, which of the following would you be most concerned about?

KSA in the world: A majority of Saudis believe recovery efforts should extend into helping the region...

% Selecting each option

“We should help our neighbours in rebuilding their economies and societies, even some of those who are not our traditional allies”

“We should help our neighbours in rebuilding their economies and societies, especially those countries with fewer resources than us who are our allies”



“We should focus mainly on rebuilding the economy and society in our own country”

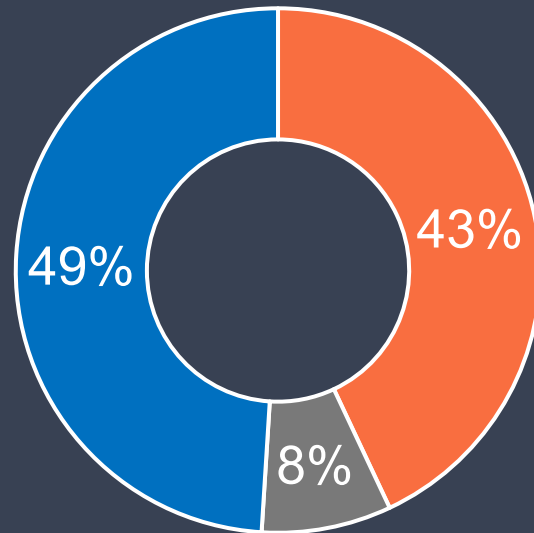
“Don’t know / None of the above”

Q8. Thinking about the aftermath of the coronavirus crisis and the task of resuming normal life, rebuilding economies and societies in the region, which one of the following statements do you agree with most?

...and G20 is an opportunity to demonstrate a convening role in global economic recovery

% Selecting each option

“Coronavirus is a global crisis requiring a global response – Saudi Arabia has an important role to play in bringing the major economies together to coordinate economic recovery”



*“All countries – Saudi Arabia included – should focus mainly on what they can do to **help their own economies recover**”*

“No opinion / None of the above”

Q9. Now thinking beyond the region and on a global scale, which of the following statements comes closest to your own view on the role Saudi Arabia should play recovering from the economic impacts of the Coronavirus crisis??

