

Driving Ban Survey SAUDI ARABIA

ATTITUDES TOWARDS THE LIFTING OF THE
BAN ON WOMEN DRIVING IN THE KINGDOM

Dec. 2017

A close-up photograph of a person's hand resting on a black car gear shift. The hand is positioned on the left side of the frame, with fingers wrapped around the top of the shift knob. The background shows the interior of a car, including the dashboard and steering wheel, which are slightly out of focus. The lighting is soft, highlighting the texture of the hand and the gear shift.

Overview

Overview: Driving Ban Survey – Saudi Arabia

- The most prominent methods of transportation for women in KSA are either to be driven by a male member of the family, or the use of ride-hailing apps. 1 in 5 households also have a hired household driver for that purpose.
- The majority expressed being pleased with the decision to lift the driving ban on women. However, women were significantly more pleased than men.
- Most see this decision as being a positive step towards the modernization of the kingdom, and towards giving women more independence, but many also feel harassment will increase as a result, and see the traffic situation worsening.
- The majority of women state that they are likely to drive once the ban is removed, and will do so within 3 months or less from the date of the ban's removal.
- A majority also reported that they will likely purchase a new car, while 1 in 2 households with a household driver will release their driver and use the driver's car.
- Male heads of household remain the primary decision makers with regards to car purchases once the ban is lifted, but women will have a big say in many households.



Current Transport Landscape

Getting Around – Current Modes of Transport For Women

Women in KSA are heavily reliant on family members to take them places, followed by ride hailing apps. 1 in 5 households also have a hired household driver.

➤ Current Modes of Transport



➤ By Region, Age, Nationality & SEC



Family Members



Ride Hailing Apps



Taxi/Public Transport



Hired Household Driver

Central Region	45%	44%	32%	26%
Western Region	52%	36%	37%	19%
Eastern Region	46%	35%	28%	23%
16-24	53%	45%	26%	24%
25-34	41%	35%	33%	22%
35-44	47%	39%	35%	20%
45+	51%	31%	26%	18%
Locals	43%	40%	25%	31%
Expats	50%	36%	36%	12%
High Income	28%	52%	36%	44%
Medium Income	45%	45%	31%	26%
Low Income	49%	33%	31%	13%



Attitudes Towards Ban Removal

Attitudes Towards Lifting of The Women Driving Ban

The majority are pleased with the decision to lift the driving ban on women, significantly more so among females in the Kingdom.



PLEASED

63%



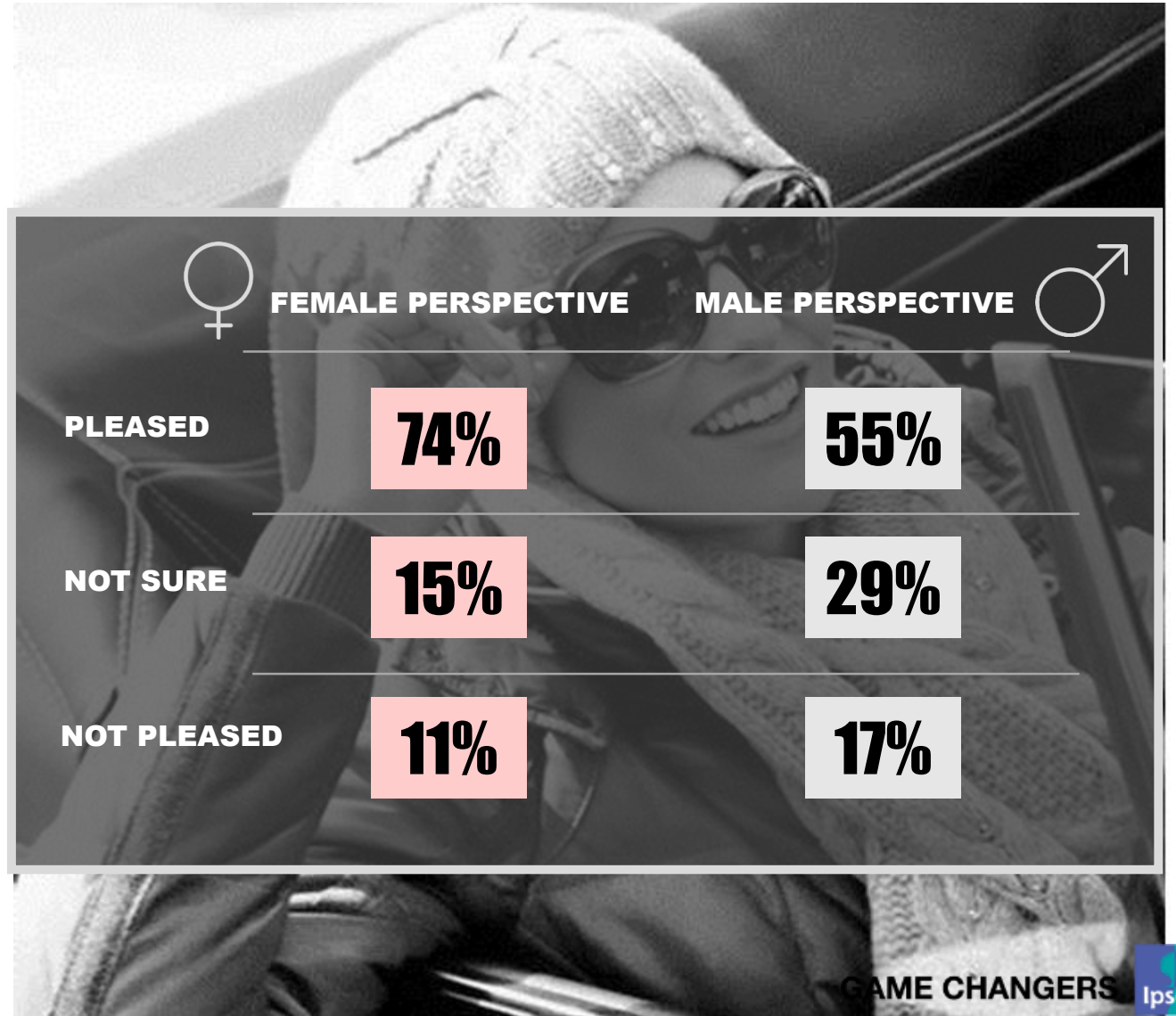
NOT SURE

23%



NOT PLEASED

14%



Attitudes Towards Lifting of The Women Driving Ban

➤ By Region, Age, Nationality & SEC



Pleased



Not Sure



Not Pleased

	Pleased	Not Sure	Not Pleased
Central Region	66%	21%	13%
Western Region	61%	23%	17%
Eastern Region	59%	25%	16%
16-24	59%	25%	16%
25-34	64%	23%	13%
35-44	64%	21%	15%
45+	65%	20%	15%
Locals	64%	20%	15%
Expats	62%	25%	13%
High Income	69%	22%	9%
Medium Income	74%	17%	9%
Low Income	57%	26%	18%



Impact Due To Lifting of The Women Driving Ban

The majority believe that lifting the ban on women driving has a positive impact on modernizing Saudi Arabia, and increased independence for women. On the other hand, many also feel there will be negative implications on issues related to traffic and road safety, as well increased harassment of women on the street.

-  **Modernization & Development**
-  **Independence For Women**
-  **Transport Expenditure For The Household**
-  **Balance Of Household Responsibilities**
-  **Moral Values Of Society**
-  **Harassment Of Women On The Streets**
-  **Traffic Congestions**
-  **Road Safety**



Impact Due To Lifting of The Women Driving Ban

By Gender

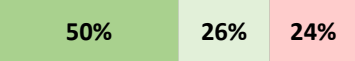


FEMALE PERSPECTIVE



MALE PERSPECTIVE

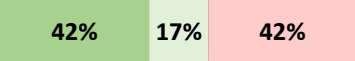
Modernization & Development



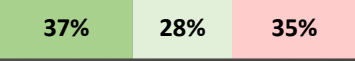
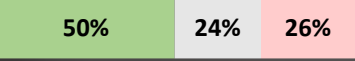
Independence For Women



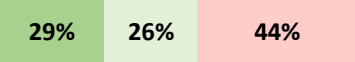
Transport Expenditure For The Household



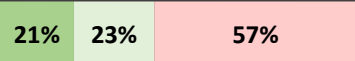
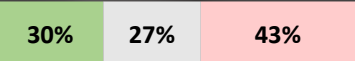
Balance Of Household Responsibilities



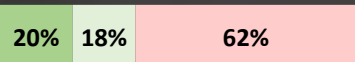
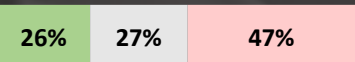
Moral Values Of Society



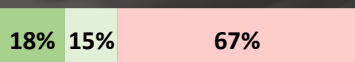
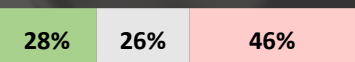
Harassment Of Women On The Streets



Traffic Congestions



Road Safety



■ Positive Change
■ No Change
■ Negative Change



Future Transport Landscape

Likelihood of Women Driving After Ban Removal

The majority of females state that they will drive once the driving ban is removed. A slightly lower majority of males also believe that women in their household will likely drive upon ban removal.

♀ Likelihood Of Females To Drive Post Ban Removal



♂ Males Expectations Of Likelihood Of Females To Drive



Likelihood of Women Driving After Ban Removal

➤ Females Only: By Region, Age, Nationality, SEC & Current Mode Of Transportation



Likely



Not Sure



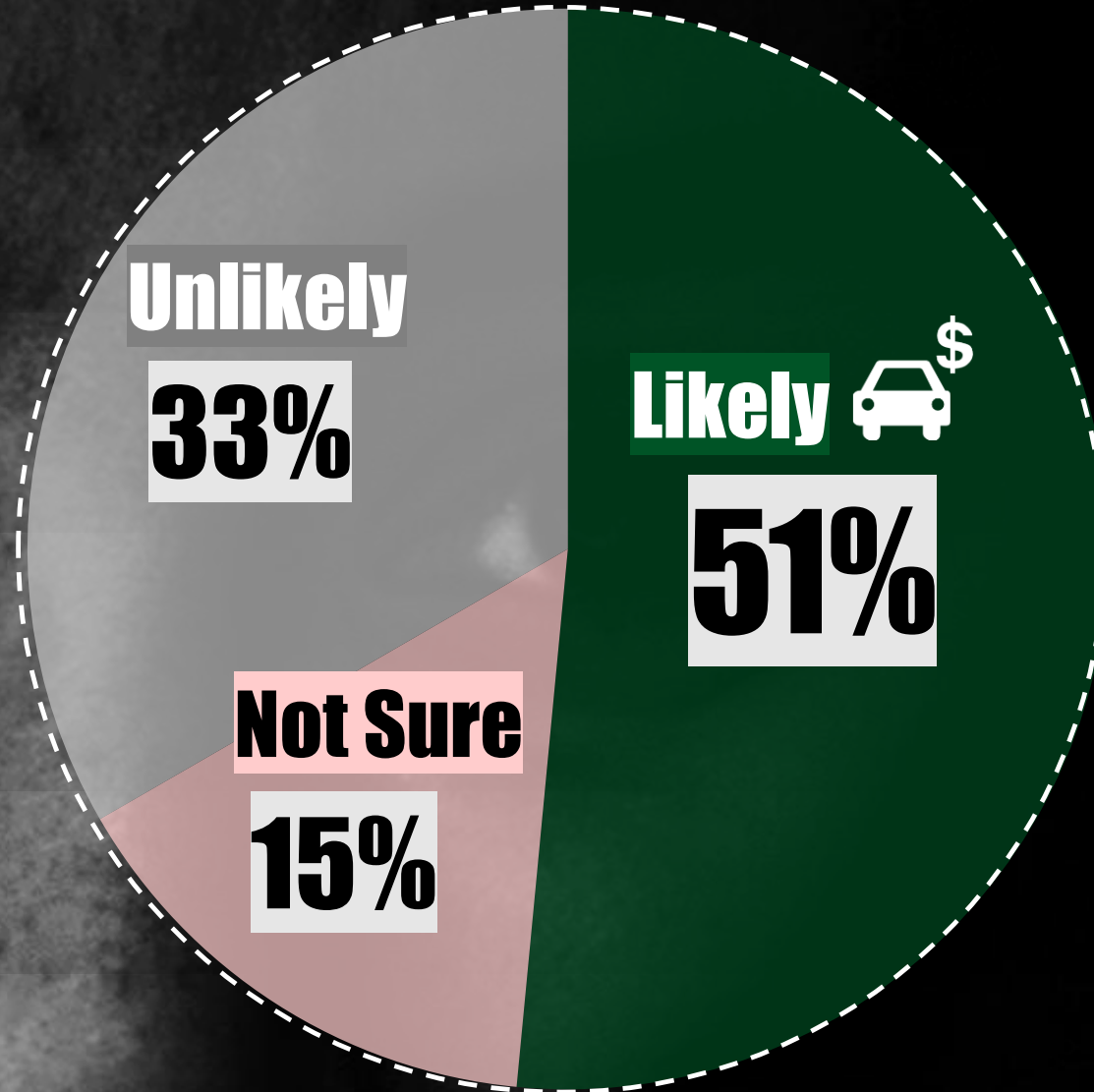
Unlikely

Central Region	72%	15%	13%
Western Region	67%	25%	8%
Eastern Region*	65%	25%	10%
16-24	70%	20%	11%
25-34	63%	26%	11%
35-44	80%	12%	8%
45+*	68%	16%	16%
Locals	71%	21%	9%
Expats	68%	19%	14%
High Income	53%	20%	27%
Medium Income	70%	21%	10%
Low Income	73%	14%	13%
Taxi/Public Transportation	71%	18%	11%
Hired Household Driver	71%	27%	2%
Ride Hailing Apps	73%	18%	9%
Family Member Drives The Women	71%	18%	12%

*Small Sample Size

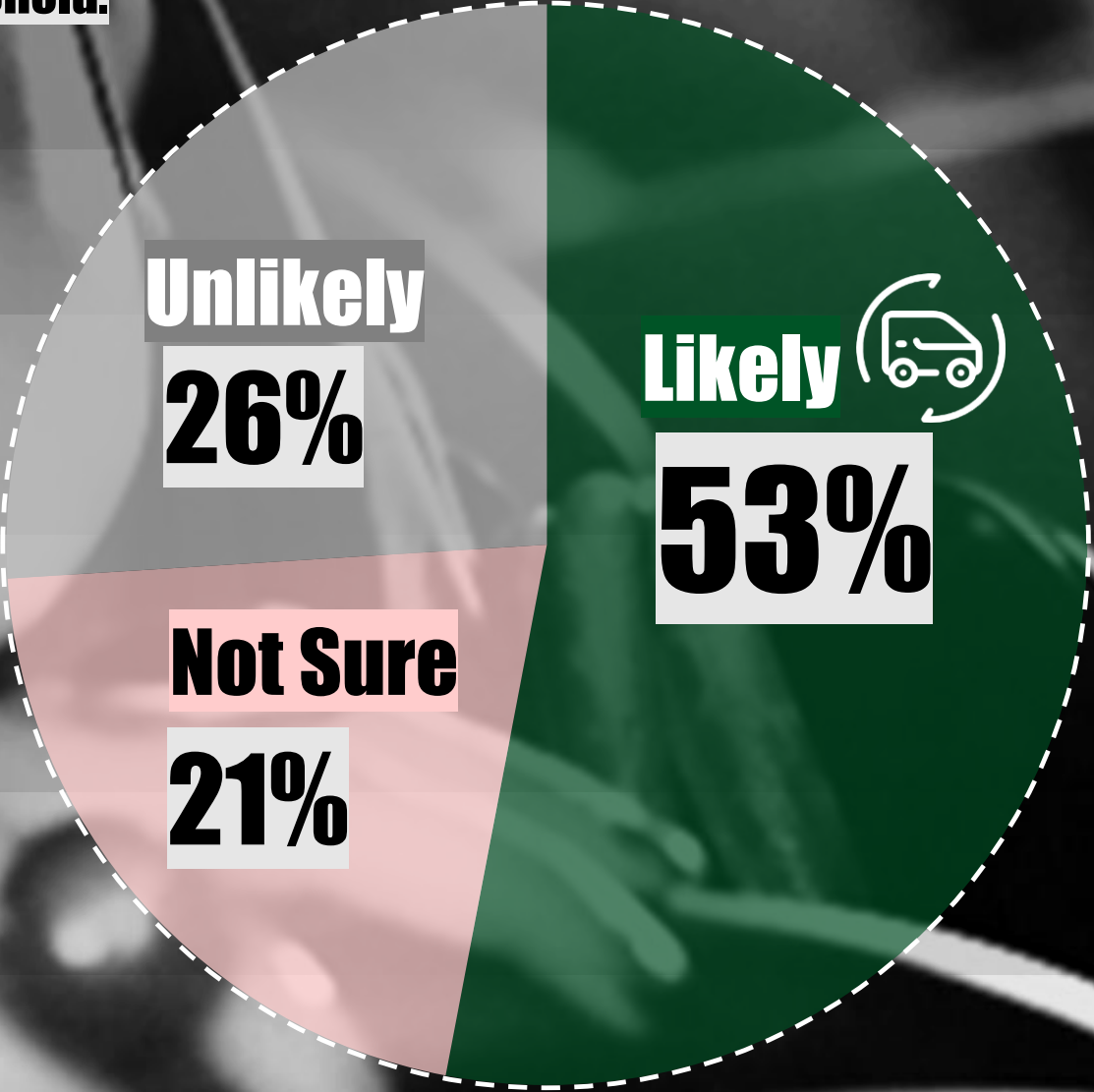
Post-ban: Likelihood Of Buying a Car

The majority are inclined to buy new cars to accommodate for the increase in the household's demand on transport needs.



Post-ban: Likelihood of Using the Driver's Car*

1 in 2 households who currently have a hired household driver expect to stop hiring a driver and for the driver's car to be used by women in the household.



*Only asked to those who have a hired household driver

Post-ban: Intended Means Of Transportation

➤ By Region, Nationality, SEC & Current Mode Of Transportation



Will Likely Buy A Car

Will Likely Use the Driver's Car*

Central Region	56%	39%
Western Region	44%	32%
Eastern Region	51%	37%
Locals	56%	44%
Expats	47%	31%
High Income	61%	58%
Medium Income	66%	41%
Low Income	44%	32%
Taxi/Public Transportation	56%	44%
Hired Household Driver	66%	57%
Ride Hailing Apps	61%	40%
Family Member Drives The Women	44%	28%

*Only asked to those who have a hired household driver

Car Purchase Decision Making Within The Household

Male Heads of Household for the most part will remain the primary decision makers with regards to car purchases once the ban is lifted, but women will have a big say in many households.



42%

MALE HEAD OF HOUSEHOLD



28%

MALE HEAD OF HOUSEHOLD WITH INFLUENCE FROM FEMALE HEAD OF HOUSEHOLD



26%

EQUAL DECISION MAKING FOR MALE & FEMALE HOUSEHOLD HEADS



2%

FEMALE HEAD OF HOUSEHOLD WITH INFLUENCE FROM MALE HEAD OF HOUSEHOLD

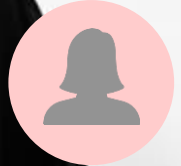
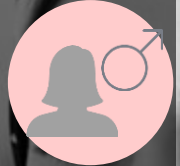


2%

FEMALE HEAD OF HOUSEHOLD

Car Purchase Decision Making Within The Household

By Region, Nationality & SEC



Male Head Of Household

Male Head of Household With Influence From The Female Head Of Household

Equal Decision Making For Male & Female Household Heads

Female Head of Household With Influence From The Male Head Of Household

Female Head Of Household

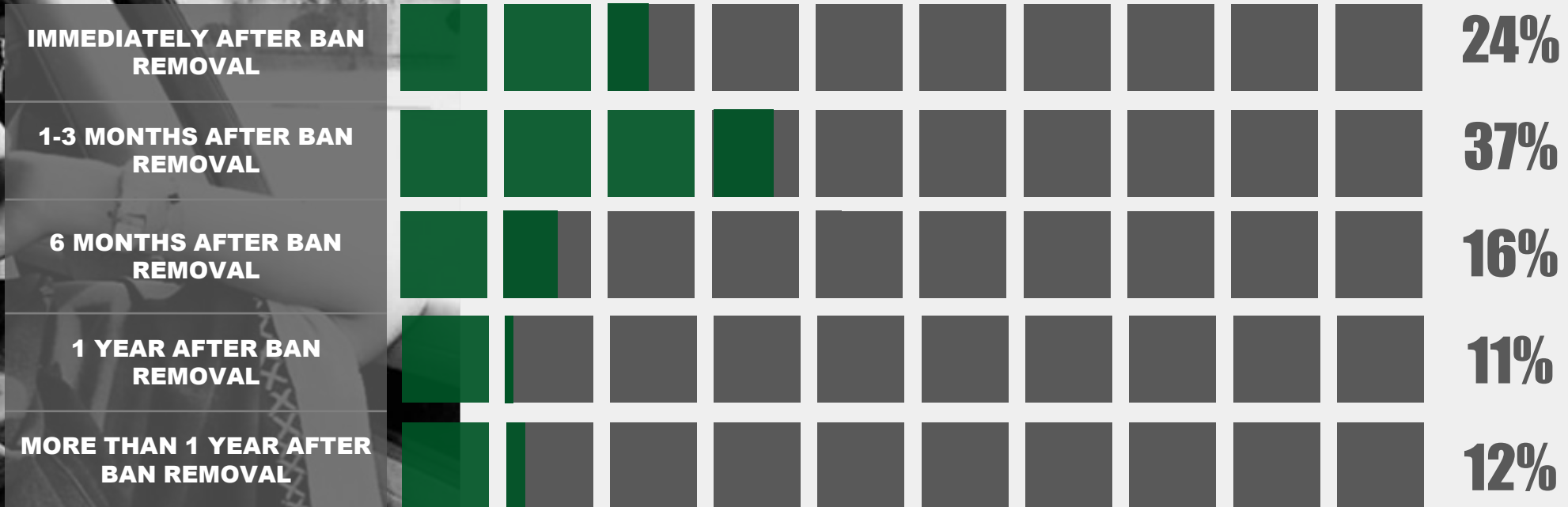
Central Region	40%	29%	28%	2%	1%
Western Region	45%	28%	22%	4%	1%
Eastern Region	38%	24%	33%	1%	3%
Locals	40%	26%	29%	3%	3%
Expats	44%	29%	24%	2%	0%
High Income	45%	23%	27%	2%	3%
Medium Income	36%	37%	24%	2%	1%
Low Income	43%	25%	27%	2%	2%

Time Period To Drive After Ban Removal

The majority of women with intentions to start driving claim that they will begin driving with a 3 month period or less from the date of the ban's removal.



Among Those Who Answered "Likely" To Drive

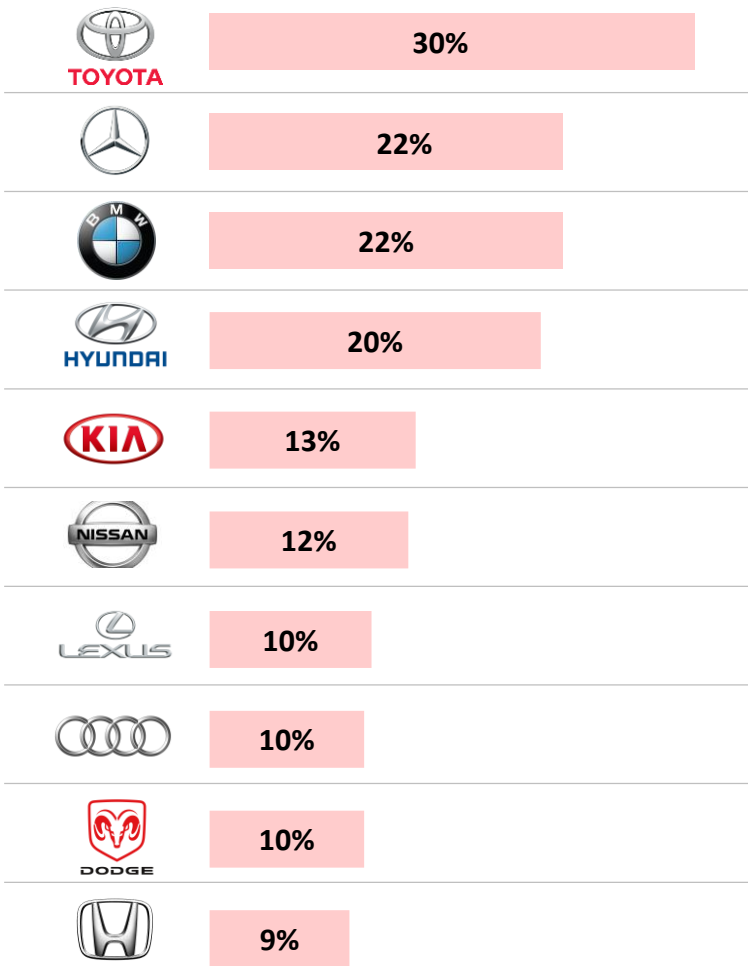


A close-up photograph of a person's hand resting on a car's gear shift. The hand is positioned on the top of the gear knob, which is black and has a leather-like texture. The background shows the interior of a car, including the dashboard and steering wheel, which are slightly out of focus. The lighting is soft, highlighting the contours of the hand and the gear shift.

Brand Preference

Most Appealing Car Brands For Women

Toyota, Mercedes, and BMW are the most appealing brands for Women. 6 of the top 10 preferred brands are Asian.








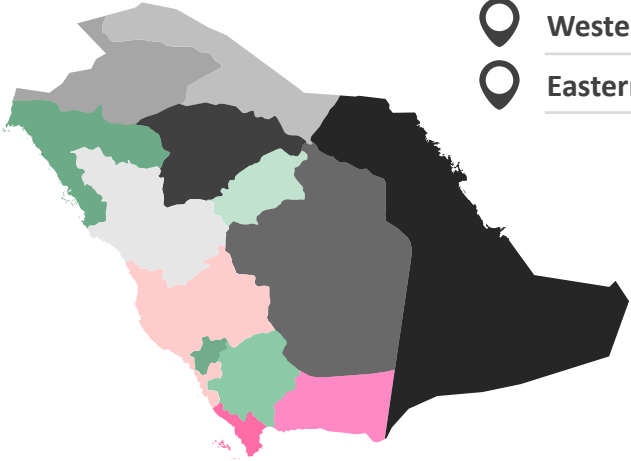
Methodology

Methodology

Where?

Saudi Arabia



	Central Region	46%
	Western Region	33%
	Eastern Region	21%



Sample Size



Who?

-  | 

Males	56%
Females	44%
- Ages 16-64
- Saudis & Expats

How?

- 
- Online Self-administered interviews

When?

- 
- Date of Survey
Oct. 2017



Thank You

For More Information:

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Ask Us About “She Speaks – KSA”;

The First & Most Comprehensive Syndicated Survey On Women In The Kingdom:

<https://www.ipsos.com/en/she-speaks-ten-things-you-need-know-about-women-mena>

GAME CHANGERS

