

# TAKAMOL HOLDING

Takamol Advisory Unit

Analysis of GASTAT Labor Force Survey Q3 2021  
March 2022

# INSIGHT PAPER

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This paper was produced by **Takamol Advisory Unit**

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# INSIGHT PAPER

## Saudi Arabian Employment Trends

- The General Authority for Statistics latest release shows that the unemployment rate for Saudi workers in Q3 2021 is 11.3%, unchanged from the previous quarter, Q2 2021.
- Compared to same period of last year, Q3 2020, the unemployment rate for Saudi workers recorded a decrease of 3.6%, down from 14.9% to 11.3%.
- Total Saudi female unemployment rate slightly decreased by 0.4%, down from 22.3% to 21.9% between Q2 and Q3 of 2021. Comparing Q3 2021 with Q3 2020 results, the statistics show a large decrease of 8.3%, down from 30.2% to 21.9%.
- Total Saudi male unemployment rate slightly decreased by 0.2% between Q2 and Q3 2021. Compared to same period last year, a decrease of 2.0% has been recorded in Q3 2021.
- Saudi youth aged 15 - 24 had the highest rate of unemployment at 17.2%. The working age group 25 - 34 recorded an unemployment rate of 16.6%.
- The employment rate for Saudi workers in Q3 2021 is 88.7%, which remains unchanged compared to Q2 2021. However, compared to Q3 2020, data shows an increase of 3.6% in the Saudi employment rate, up from 85.1% to 88.7%.

- Data shows a slight increase in male and female Saudi workers, with a 0.2% increase in Saudi males, and a 0.4% increase in Saudi females between Q2 and Q3 2021.
- Compared to same period last year, data shows that Saudi female employment recorded an increase of 8.0%, with a 2.0% increase for Saudi male workers.
- Among age groups, Saudi youth aged 15 - 24 recorded the lowest percentage of Saudi employment at 82.8%, followed by the working age group 25 - 34 with a total rate of 83.4% in Q3 2021.
- Saudi labor force participation rate increased in Q3 2021 to reach 49.8%, recording a 0.4% increase, up from 49.4% in Q2 2021.
- Saudi male labor force participation rate slightly decreased by 0.7%, from 65.7% to 65% quarter on quarter, whilst the Saudi female labor force participation rate increased by 1.7%, from 32.4% to 34.1% quarter on quarter.
- The working age group 35 - 44 recorded the highest rate of Saudi labor force participation with a total of 72.6% in Q3 2021, whilst the youth group 15 - 24 and the 55 and over age group recorded the lowest Saudi participation rates with 24.7% for youth, and 24.6% for participants aged 55 and over same period.



## Non-Saudi Employment Trends

- The total unemployment rate for non-Saudi workers in Q3 2021 is 2.4%, unchanged compared to the previous quarter Q2 2021.
- Data shows a slight decrease of 0.3% in the unemployment rate compared to same period of last year, Q3 2020, down from 2.7% to 2.4%.
- Data shows an increase of 1.1% in the non-Saudi female unemployment rate, from 6.3% to 7.4% quarter on quarter, whilst a slight decrease has been recorded in non-Saudi male unemployment by 0.3%, from 1.8% to 1.5%.
- The highest unemployment rate for non-Saudi was among youth aged 15-24, with a total rate of 20.0% in Q3 2021.
- The total non-Saudi employment rate remains unchanged in Q3 2021 at 97.6%. Non-Saudi female employment slightly decreased by 1.1%, from 93.7% to 92.6% quarter on quarter. The non-Saudi male employment rate increased by 0.3%, from 98.2% to 98.5% between Q2 2021 and Q3 2021.



## Gender Trends

- A slight increase of 0.4% in the Saudi participation rate in the labor market has been recorded, up from 49.4% to 49.8% between Q2 and Q3 2021, during which females fared better than males.
- Saudi female participation rate witnesses an increase of 1.7%, from 32.4% to 34.1%, in contrast with the Saudi male participation rate which witnessed a 0.7% decrease from 65.7% to 65% during the same period.
- Total employment for Saudis remains unchanged at 88.7% compared with the previous quarter. Data shows a slight increase in the Saudi male and female employment rates, an increase of 0.2% for males, from 93.9% to 94.1% between Q2 and Q3 2021, and an increase of 1.7% for females, up from 32.4% to 34.1% during the same period.
- In terms of the monthly average wage, a Saudi male earns more than a Saudi female worker. In Q3 2021, data shows that a Saudi male earns on average 11,117 SAR, whilst a Saudi female earns an average of 8,187 SAR.
- Compared to the previous quarter, Saudi female average wage decreased by 282 SAR, whilst an increase of 73 SAR was reported for Saudi male average wage.



## Educational Attainment Trends

- In Q3 2021, the highest unemployment rate for Saudis was among bachelor's degree or equivalent holders with a total of 14.8%. This was followed by early childhood education with a total Saudi unemployment rate of 13.8%.
- The highest unemployment rate for Saudi females was found in bachelor's degree or equivalent holders with a total of 26.9% in Q3 2021. When compared to Q2 2021, data shows a sharp decline of 34.2%, down from 61.1% in the Saudi female unemployment rate in this specific educational attainment group.
- In contrast, for male Saudis, the highest unemployment rate was found among early childhood education with a total of 10.6%. compared to Q2 2021, the highest unemployment rate for male Saudis was among upper secondary education with a total of 46.8%.
- In terms of total Saudi employment, the highest employment rate for Saudis, males and females combined, was recorded among the bachelor's degree or equivalent holders with a total of 35.9%.
- Bachelor's degree or equivalent holders, represent the largest group of Saudi employment rates for females with a total of 48.1%. When compared to the previous quarter, Q2 2021, a decrease of 0.7% was reported, down from 48.8%.
- Upper secondary education group represent the highest Saudi employment rate for males with a total of 37.0% in Q3 2021. When compared to the previous quarter, a slight decrease of 0.5% was reported, down from 37.5%.

## Age Group Trends

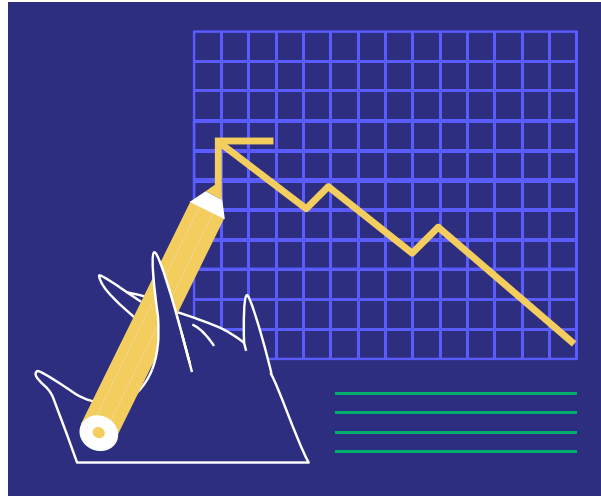
- The highest rate of Saudi unemployment, male and female combined, was among the youth age group 15 - 24, with a total of 17.2% in Q3 2021.
- For females, the working age group 25 - 34 recorded the highest unemployment rate at 33.6%, whilst the male unemployment rate was the highest among the youth age group 15 - 24 with a total rate of 14.9%.
- Highest Saudi employment rate, for males and females combined, was recorded in the 55 and over age group with a total of 98.5%. This was followed by the working age group 45 - 54 with a total employment rate of 96.2% in Q3 2021.
- In terms of male and female employment rates, both genders recorded the highest employment rate in the 55 and over group, with a total of 95.8% for females and 99.4% for males.

## Regional Trends

- **Madinah, Aljouf, and Tabuk regions** recorded the highest Saudi unemployment rates, with 16.2%, 15.8% and 15.7% in Q3 2021. In contrast, the **Eastern Province, Riyadh, and Qassim regions** recorded the lowest unemployment rates for Saudis, with 8.6%, 9.2% and 10.9% in Q3 2021.
- Highest unemployment increase was recorded in **Hail region** with a total increase of 4.6%, up from 8.7% to 13.3% between Q2 and Q3 2021. This was followed by **Albaha region** with a 3.0% increase, up from 8.1% to 11.1% during the same period. In contrast, **Jazan region** recorded the highest decrease in Saudi unemployment with 3.8%, down from 16.8% to 13.0% between Q2 and Q3 2021. This was followed by the **Eastern Region** with a total decrease of 2.5%, down from 11.1% to 8.6% during same period.
- **Eastern Province, Riyadh, and Qassim regions** recorded the highest share of Saudi employment in Q3 2021, with 91.4%, 90.8%, and 98.1%. In contrast, **Madinah, Tabuk, and Aljouf regions** recorded the lowest rates of Saudi employment, with 83.8%, 84.3%, and 84.2% in the same quarter.
- **Jazan region** recorded the highest increase with 3.8% in the total share of Saudi employment, up from 83.2% to 87.0% between Q2 and Q3 2021. This was followed by the **Eastern Province** with a 2.6% increase, up from 88.9% to 91.4% within the same period.

- In contrast, **Hail region** recorded the highest decrease in Saudi employment with 4.6%, down from 91.3% to 86.7 % between Q2 and Q3 2021. This was followed by **Albaha region** with a decrease of 3.0%, down from 91.9% to 88.9% within the same period.

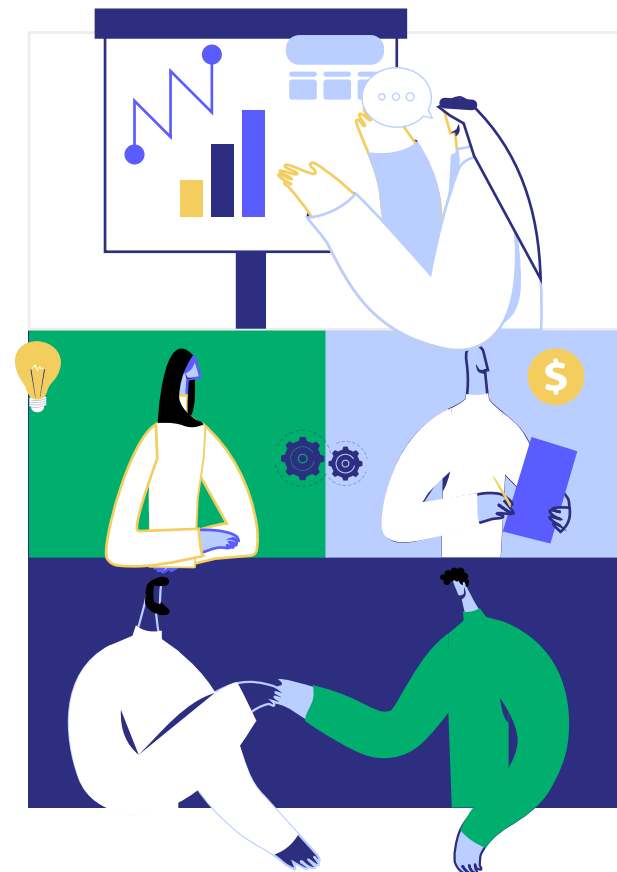




## Wage Trends

- Data shows a total average monthly wage for all workers (both Saudi and non-Saudi) between Q2 and Q3 2021 is 6,785 SAR. The total average wage for male workers increased by 397 SAR, up from 6,759 SAR to 7,156 SAR quarter on quarter. The total average wage for females decreased by 157 SAR, down from 5,192 SAR to 5,035 SAR during the same period.
- Compared to Q3 2020, data shows an increase of 184 SAR in the total average wage for all workers, up from 6,601 SAR to 6,785 SAR. The total average wage for males increased by 556 SAR, up from 6,600 SAR to 7,156 SAR during the same period. The total female average wage decreased by 1,568 SAR, down from 6,603 SAR to 5,035 SAR between Q3 2020 and Q3 2021.
- In Q3 2021, the total Saudi average wage decreased by 17 SAR, from 10,491 SAR to 10,474 SAR quarter on quarter. Data shows a decrease of 282 SAR in Saudi female average wage, down from 8,469 SAR to 8,187 SAR. An increase of 73 SAR was reported in the Saudi male average wage, up from 11,044 SAR to 11,117 between Q2 2021 and Q3 2021.

- Compared to same period last year, data shows the Saudi female average wage decreased by 493 SAR, down from 8,680 SAR to 8,187 SAR. The Saudi male average wage increased by 735 SAR, up from 10,382 SAR to 11,117 SAR within the same period, Q3 2020 to Q3 2021.
- Data shows a non-Saudi average wage of 4,601 SAR in Q3 2021, up by 510 SAR, from 4,091 SAR to 4,601 SAR between Q2 and Q3 2021. An increase of 203 SAR has been reported in the non-Saudi female average wage, up from 2,082 SAR to 2,285 SAR between Q2 and Q3 2021, and an increase of 597 SAR for Non-Saudi male average wage, up from 4,409 SAR to 5,006 SAR during the same period.
- Compared to same period last year, data shows an average wage increase of 370 SAR for non-Saudi (males and females), up from 4,231 SAR to 4,601 SAR between Q3 2020 and Q3 2021.



## Sectoral Trends

### Sectors

- On a sectoral basis, including Saudi and non-Saudi workers, the private sector recorded the highest percentage of total employment at 54.3% in Q3 2021. Whereas in the public sector, results show a percentage of 27.1% of total employment.
- Q3 2021 data recorded that the highest percentage of total Saudi workers were employed in the public sector with a total of 53.3%. Meanwhile, in the private sector, a total Saudi employment rate of 45.8% was reported in Q3 2021.
- In terms of gender, the majority of workers in the public sector are Saudi males, with a total of 59.2% for Saudi males and 39.3% for Saudi females in Q3 2021. Compared to the previous quarter a total decrease of 1.2% has been reported for Saudi males and 1.1% for Saudi females.
- In contrast, the majority of workers in the private sector are Saudi females with a total of 59.2% for female workers and 40.2% for male workers. Between Q2 and Q3 of 2021, the percentage of Saudi workers in the private sector increased by 0.6% for females, up from 58.6% to 59.2%, and 1.3% for males, up from 38.9% to 40.2%.

### Economic Activity

- Between Q2 and Q3 of 2021, the Agriculture, Forestry and Fishing sector, the Wholesale and Retail Trade sector and the Education sector recorded the highest increase as a percentage of Saudi employment.

### Agriculture, Forestry and Fishing Sector:

The share of total Saudi employment increased by 0.9%, up from 1.1% to 2.0% between Q2 and Q3 2021. Female workers represent 0.8%, down by 0.1% from 0.9% in Q2 2021, whilst male workers represent 2.5%, up by 1.4% from 1.1% in Q2 2021.

### Wholesale and Retail; Repair of Motor Vehicles and Motorcycles Sector:

The Wholesale and Retail; Repair of Motor Vehicles and Motorcycles sector recorded an increase of 0.9% in Saudi employment, up from 11.2% to 12.1% between Q2 and Q3 2021. The percentage of female workers increased by 1.9%, up from 16.1% to 18.0% between Q2 and Q3 2021. The percentage of male workers increased by 0.4%, up from 9.3% to 9.7% during same period.

### Education Sector:

In Q3 2021, the share of Saudi employment in the Education sector is 16.5%, up by 0.6% compared to the previous quarter. An increase of 1.4% has been reported for Saudi female workers, with a 0.2% decrease for Saudi male workers.

### Manufacturing Sector:

A total increase of 0.3% has been reported in the share of Saudi employment, up from 6.5% in Q2 2021 to 6.8% in Q3 2021. The majority of workers in the Manufacturing sector are females, with a total of 8.1% for females and 6.3% for males.

### Real Estate Activities Sector:

The Real Estate Activities sector recorded a 0.9% share of Saudi employment in Q3 2021, up by 0.3% compared to the previous quarter. Male workers represent 1.0% and female workers represent 0.7% of total Saudi employment.

### Construction Sector:

An increase of 0.2% has been reported in the share of total Saudi employment, up from 5.4% to 5.6% between Q2 and Q3 2021. Female workers represent 7.0% while male workers represent 5.0% of total Saudi employment.

### Accommodation and Food Service Activities Sector:

Data shows a total Saudi employment rate of 3.1%, up by 0.2% between Q2 and Q3 2021. Females represent the majority of workers in the sector with a 4.9% share of employment, while males represent 2.4%.

- In terms of the highest decrease in the share of Saudi employment, the Public Administration and Defense sector, the Mining and Quarrying sector and the Transportation and Storage sector recorded the highest decreases in Saudi employment in Q3 2021.

### Public Administration and Defense Sector:

The highest decrease in terms of Saudi employment, based on economic activity, was recorded in the public administration and defense sector by a 2.1% decrease, down from 29.9% in Q2 2021 to 27.8% in Q3 2021. The majority of workers in the public administration and defense sector are males, with a total of 36.7% for males and 6.6% for females.

### Mining and Quarrying Sector:

A decrease of 0.5% has been reported in the share of total Saudi employment, down from 2.0% to 1.5% between Q2 and Q3 2021. Female workers represent 0.4% while male workers represent 1.9% of total Saudi employment.

### Transportation and Storage Sector:

Data shows a total Saudi employment rate of 2.9%, down by 0.4% between Q2 and Q3 2021. Males represent the majority of workers in the sector with a 3.6% share of employment, and females represent 1.3%.

### Financial and Insurance Activities Sector:

The financial insurance activities sector recorded total employment of 1.9% share of Saudi employment in Q3 2021, down by 0.2% compared to the previous quarter. Male workers represent 2.1% and female workers represent 1.5% of total Saudi employment.

### Electricity, Gas, Steam and Air Conditioning Supply Sector:

In Q3 2021, the share of total Saudi employment in the electricity, gas, steam and air conditioning supply sector is 0.7%, down by 0.1% compared to the previous quarter.

### Professional, Scientific and Technical Activities Sector:

The professional, scientific, and technical Activities sector recorded total employment of 1.6% share of Saudi employment in Q3 2021, down by 0.1% compared to the previous quarter. Male workers represent 1.6% and female workers represent 1.8% of total Saudi employment.

### Other Service Activities Sector:

A decrease of 0.1% has been reported in the share of total Saudi employment, down from 2.7% to 2.6% between Q2 and Q3 2021. Female workers represent 2.6% while male workers represent 2.5% of total Saudi employment.

- In Q3 2021, the Information and communication, Human health and social work activities, Arts, entertainment and recreation, and the Activities of extraterritorial organizations and bodies sectors remain unchanged between Q2 and Q3 2021 in terms of Saudi share of employment.



## The Impact of COVID 19

- Saudi Arabia ranked 2nd in Bloomberg global COVID 19 resilience ranking. The report assessed the best place to be during the coronavirus pandemic. The report highlighted that, even during the COVID 19 new variant 'Omicron', Saudi Arabia managed to keep death rates low, due to the high vaccination levels, with a total percentage of 90% for the age group 60 and above.
- As of February 2022, Saudi Arabia reached a total of 58,558,564 million registered doses for the coronavirus vaccine. The number of total cases reached 712,644 cases, with a total recovery of 670,780 cases.
- After easing the restriction of COVID 19 for fully vaccinated people with 2 doses, in December 2021, the Ministry of Health made masks mandatory again in closed and open spaces in response to the recent increase in the number of cases related to the new variant.
- Following the re-issued restrictions, the Ministry of Interior announced penalties for individuals violating face masks regulations in public places, starting with 1,000 SAR and could reach up to 100,000 in case of repetition. In addition, anyone who violates isolation or institutional quarantine regulations shall be fined up to 200,000 SAR. Foreigners may be deported and banned from re-entering the country if found to be in breach of the COVID-19 measures.

## Sources

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General Authority for Statistics, Labor Force Survey Q2 2021.

General Authority for Statistics, Labor Force Survey Q3 2020.

Ministry of Health

Ministry of Interior

Arab News