Ageing in the Gulf States

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Documenting the ageing of populations and assessing the linkages between demographic change and the need for elderly care in GCC countries often rely on international datasets that aggregate national and foreign resident populations. Alternatively, demographic projections may only consider national populations. Most Gulf countries' statistics produce disaggregated data relevant to drawing a picture of ageing populations. However, changes in migration-related policies may affect the assessment of the future needs for elderly care in the region.

Table 1. Distribution of national and non-national populations by broad age group in GCC countries (in %) (2022)
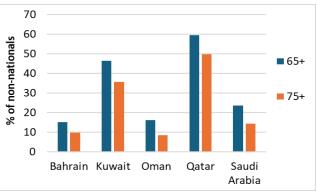
		< 15	15-64	65+	Total (number)
Bahrain	Nationals	29.6	64.2	6.2	714,011
	Non-nationals	10.3	88.7	1.0	810,682
Kuwait	Nationals	32.9	62.3	4.8	1,517,076
	Non-nationals	12.4	85.7	1.9	3,276,492
Oman	Nationals	38.4	57.8	3.9	2,867,611
	Non-nationals	7.6	91.3	1.0	2,066,239
Qatar	Nationals	36.0	60.1	3.9	348,839
	Non-nationals	14.2	85.0	0.8	2,583,402
Saudi Arabia	Nationals	34.8	61.7	3.5	18,792,262
	Non-nationals	10.1	88.4	1.5	13,382,962
UAE	Nationals	N.A.	N.A.	N.A.	N.A.
	Non-nationals	N.A.	N.A.	N.A.	N.A.

Source: GCC national institutes of statistics.
Qatar: GLMM estimate; UAE: No disaggregated data available.

The age distribution of GCC countries is dominated by young generations. On average, over 30 percent of nationals in Gulf states are below 15 years old and aside from Bahrain, the share of nationals aged 65 and above stands below 5 percent. A consequence of policies limiting foreign workers' settlement in Gulf states, the bulk of the non-nationals are in working age groups (15-64 years) (Table 1).

As access to healthcare has improved in the region, leading to longer life expectancy, coupled with nationals' fertility rates going down everywhere, numbers and relative shares of elderly nationals are expected to expand. Social changes such as progress in education and the expansion of female employment may also affect traditional intergenerational support systems and gender roles, thus contributing to increasing the demand for senior care facilities.

However, migration policies also have a stake in that matter. Due to their demographic prominence in total populations in four of the six GCC countries (Table 1), non-nationals make up a significant share of senior populations (Figure 1), up to a half of those aged 75 and above in Qatar, for example. This confirms that some non-nationals remain in Gulf states, even after retirement age. However, current developments in migration-related policies (labour nationalisation policies, the creation of retirement visas, investor, or Golden residencies, for instance) may impact foreigners' residency patterns and thus, confuse demographic projections of the ageing populations in Gulf countries.

Figure 1. Share of non-nationals in elderly populations by country (65+; 75+) (2022)

Source: GCC national institutes of statistics
UAE: no disaggregated data available.