

Capability Demonstration: Saudi Arabia's "Giga Projects"



“King Abdullah City, King Fahad City, King Salman Zone, NEOM, Red-Sea City, Amaala & Alauddin’s Cave of Wonders. All "under development" by #Saudi since I was born in 1984! Call it No vision 2030!” *Suhaib Nasir, [Tweet](#)*

Overview

Saudi Arabia’s multi-billion dollar “Giga Projects” are the most representative component of Vision 2030, integral to its overall success, and symbolic of the Kingdom’s inability to address citizens’ rapidly changing beliefs through Vision 2030 initiatives. Anger, resentment, and uncertainty associated with Giga Projects are expressed among Saudi citizens’ online discussions, at varying levels, across different ages, demographic groups, and geographies. Moreover, deep-seeded social and economic concerns jeopardize the successful execution of these projects, increase tensions among citizens, and the Kingdom's overall Social Risk exposure.



Trending cartoon featuring Giga Projects mocking Vision 2030 (Source: [Twitter](#))

Data Analytics

ENODO collected and analyzed 74,745 Twitter posts, 61,221 Facebook posts, 41,210 Instagram posts, 30,812 YouTube comments, 17,210 news websites, and 13,211 blogs in Arabic and English in Saudi Arabia over a 90-day period to create this analysis. Analysts identified and measured public sentiment of trending topics associated with each Giga Project across different age groups, demographics, and geographies, and identified key influencers in order to develop findings and recommendations.

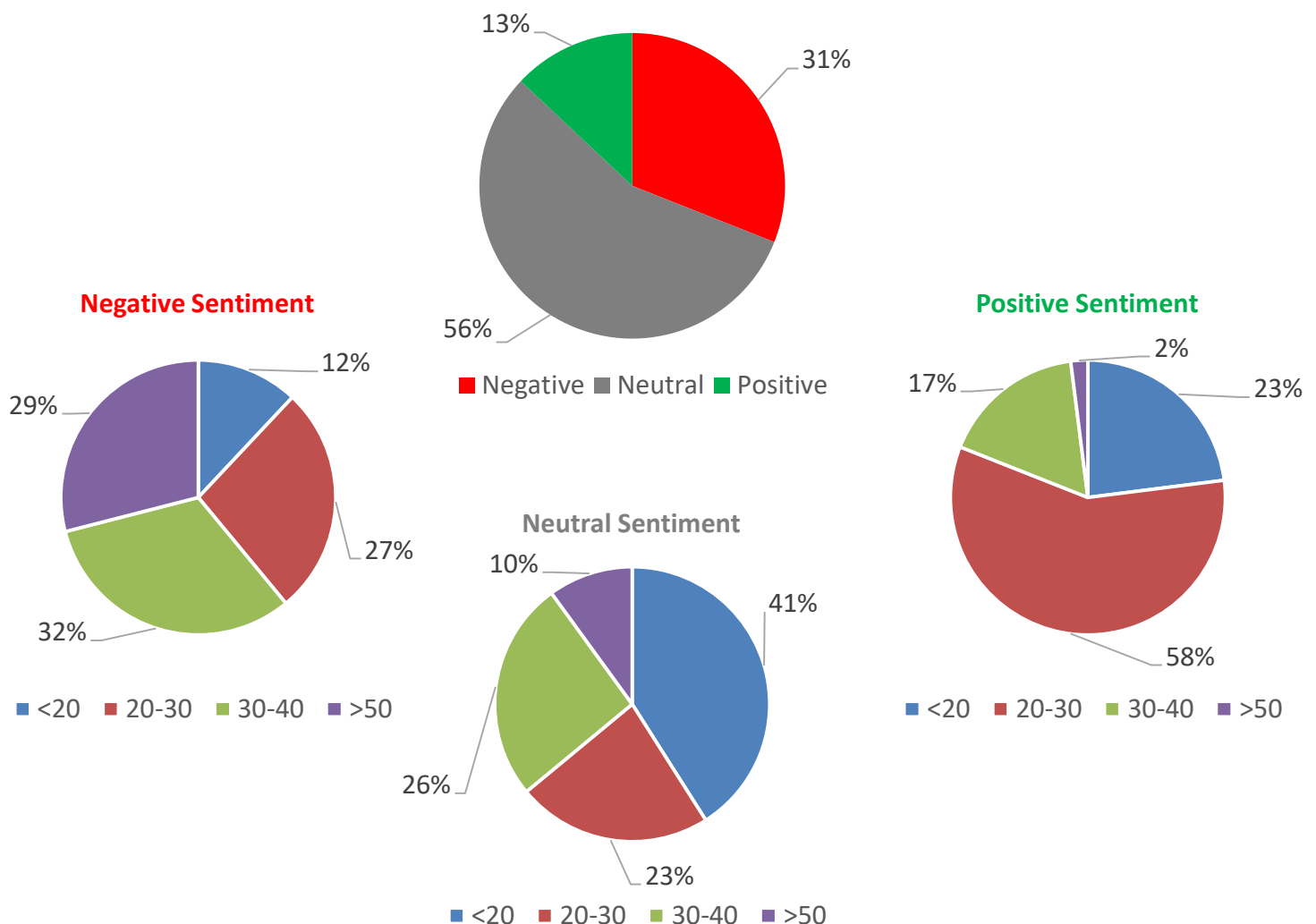
“Ahh, this will destroy the sea, coral and sea life 🙄🙄🙄” Malgosia, [Facebook](#)

Sentiment Analysis

Measured public sentiment across different age groups related to the Red Sea Project, a luxury tourism initiative

- Public sentiment was predominantly neutral (56%) due to citizens' uncertainty about the project's scope, particularly in the Red Sea coast city of Yanbu
- Negative sentiment (31%) centered around potential Saudi employees' uncertainty about their employability in the project's luxury hotels
- Neutral sentiment comprised the largest amount (56%)
 - 41% was expressed by people less than 20 years old
- Negative sentiment was almost equally distributed among all age groups less than 50 years of age, with highest (32% of all negative sentiment) in the 30-40 age group

Red Sea Project Public Sentiment



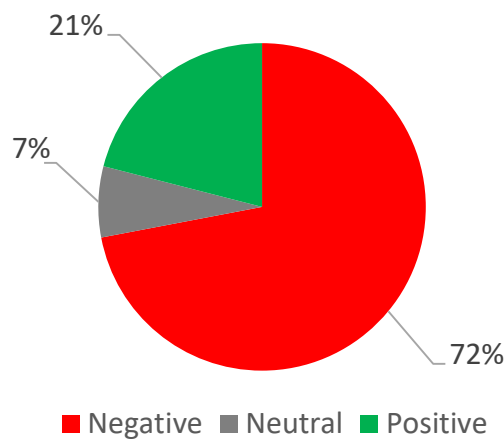
“It’s gonna be a big challenge to transform this dry lands to wonderful project” *Al Gauthen, [Tweet](#)*

Sentiment Analysis

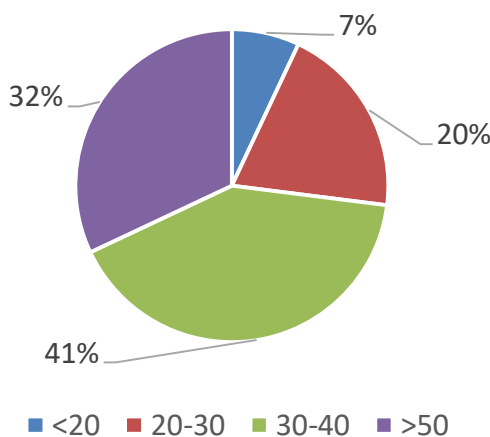
Measured public sentiment across different age groups related to the Qiddiya Project, an entertainment and sports city

- Saudi citizens expressed (72%) negative sentiment due to impact of the Jamal Khashoggi murder on the Saudi sports industry
 - 88% of these discussions mentioned the cancelation of Saudi Arabia sporting events due to the media boycott following the scandal
- The majority of negative sentiment emerged from the 30-40 age group (41%) followed closely by >50 age group (32%)
- A significant percentage of young teenagers (67%) expressed positive sentiment in the new sports and entertainment facilities proposed at Qiddiya

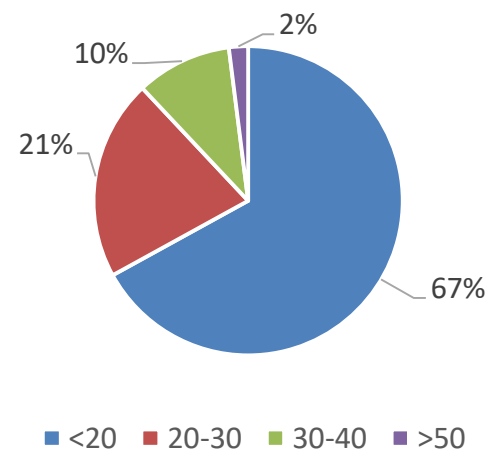
Qiddiya Project Public Sentiment



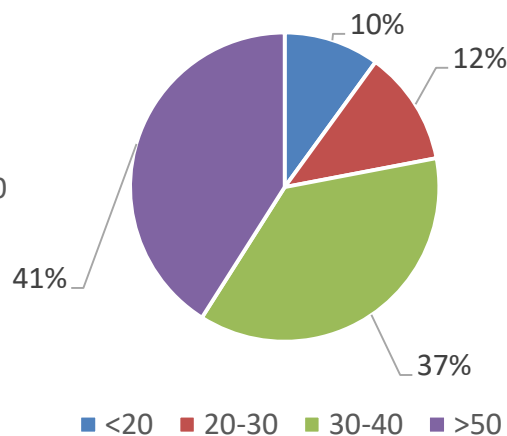
Negative Sentiment



Positive Sentiment



Neutral Sentiment



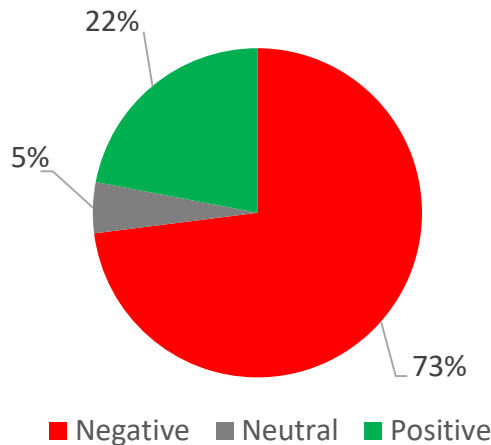
“And no one who works here is a Saudi. And the management is made of foreigners, it’s like is a fortress for them” *Al Nashmi, [Tweet](#)*

Sentiment Analysis

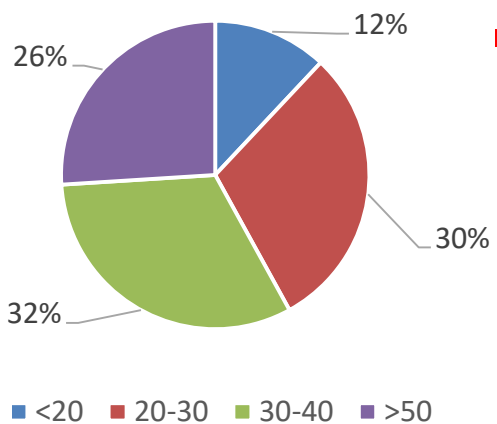
Measured public sentiment across different age groups related to the NEOM Project, “Middle East’s Silicon Valley”

- High negative sentiment (73%) was due to citizens’ concern about paltry employment opportunities due to proposed widespread use of automation (i.e. robot labor) instead of manual labor
- Small but growing positive sentiment (22%) included favorable perceptions from Saudi’s branding the NEOM Project as the Middle East’s “Silicon Valley”
- Negative sentiment was nearly equally distributed across young and older age groups (30% among 20-30; 32% among 30-40; and 26% among >50)
- The majority of youth (52%) in the 20-30 age group, expressed positive sentiment as the Middle East’s next “Silicon Valley.”

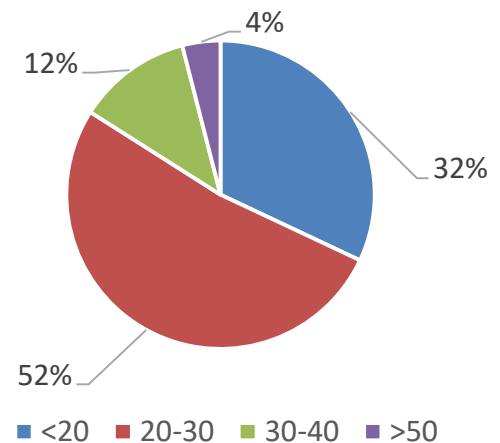
NEOM Project Public Sentiment



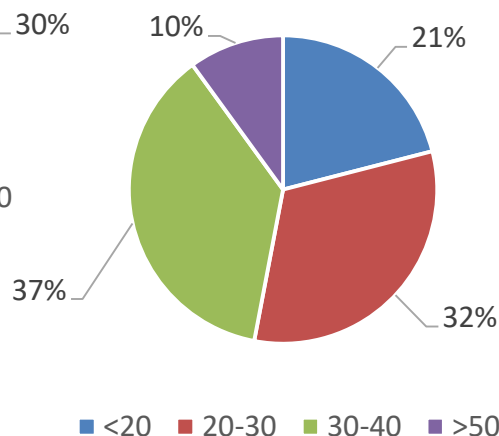
Negative Sentiment



Positive Sentiment



Neutral Sentiment



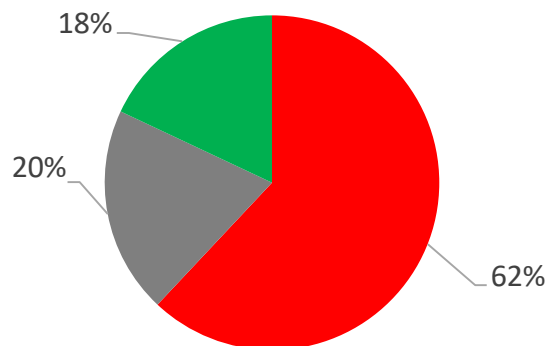
“Seventy thousand jobs for foreigners and there will be no share for the Saudis except for receptionists” *Abo Laila, [Tweet](#)*

Sentiment Analysis

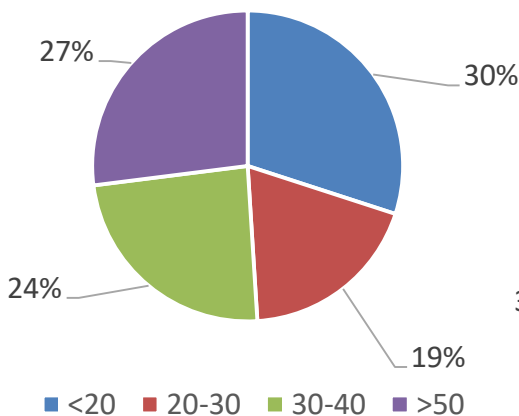
Measured public sentiment across different age groups related to the Amaala Project, a ‘mega’ wellness retreat.

- Negative sentiment (62%) was primarily due to frustration with the influx of foreign laborers in the proposed 70,000 job openings at the resort
 - Negative sentiment (62%) was nearly equally distributed across all age groups (30% <20; 19% 20-30; 24% 30-40; and 27% >50)
- Positive sentiment is associated with people outside Saudi Arabia expressing interest in the creation of a “Middle Eastern Riviera”
 - Positive sentiment was expressed significantly by the 20-30 age group due to the prospects of Saudi Arabia’s future tourism attractions at Amaala

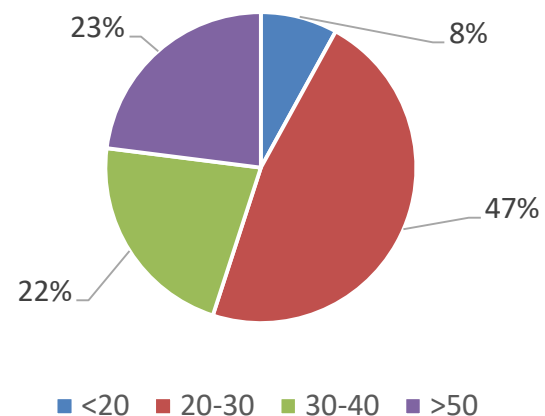
Amaala Project Public Sentiment



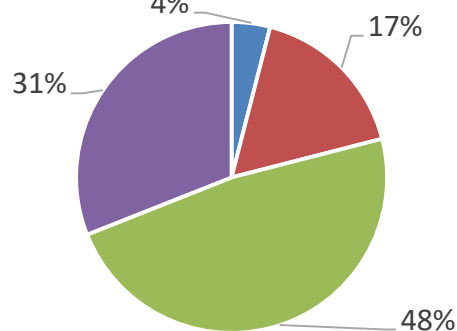
Negative Sentiment



Positive Sentiment



Neutral Sentiment



■ <20 ■ 20-30 ■ 30-40 ■ >50

“Hopefully we’ll see the youth in the region and the Kingdom participate in building this development” *Abdul Rahman, [Facebook](#)*

Topic Modeling

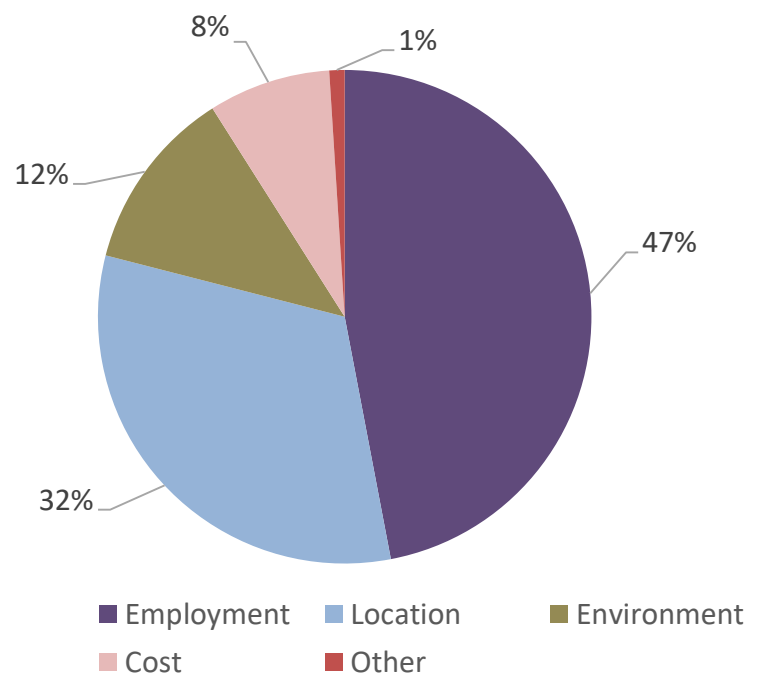
Revealed four trending topics related to all Giga Projects:

- **Employment:** 47% of discussions concerned employment in the various projects, particularly in the hospitality sector with the Amaala and Red Sea projects
- **Location:** 32% were related to the projects’ location in the western part of the Kingdom
 - 91% of these discussions originated from the Eastern Province and were predominantly negative (see geographic analysis)
 - The remaining 9% emanated from Riyadh
- **Environment:** 12% of discussions were related to the project’s impact on the environment along the Red Sea
- **Cost:** 8% of discussions expressed dissatisfaction with the extremely high cost associated with the projects (e.g. NEOM City’s \$500 billion budget)



An ad circulated online criticizing the projects associated with the Vision 2030 strategy (Source: [Twitter](#))

Giga Project topics discussed online in Saudi Arabia

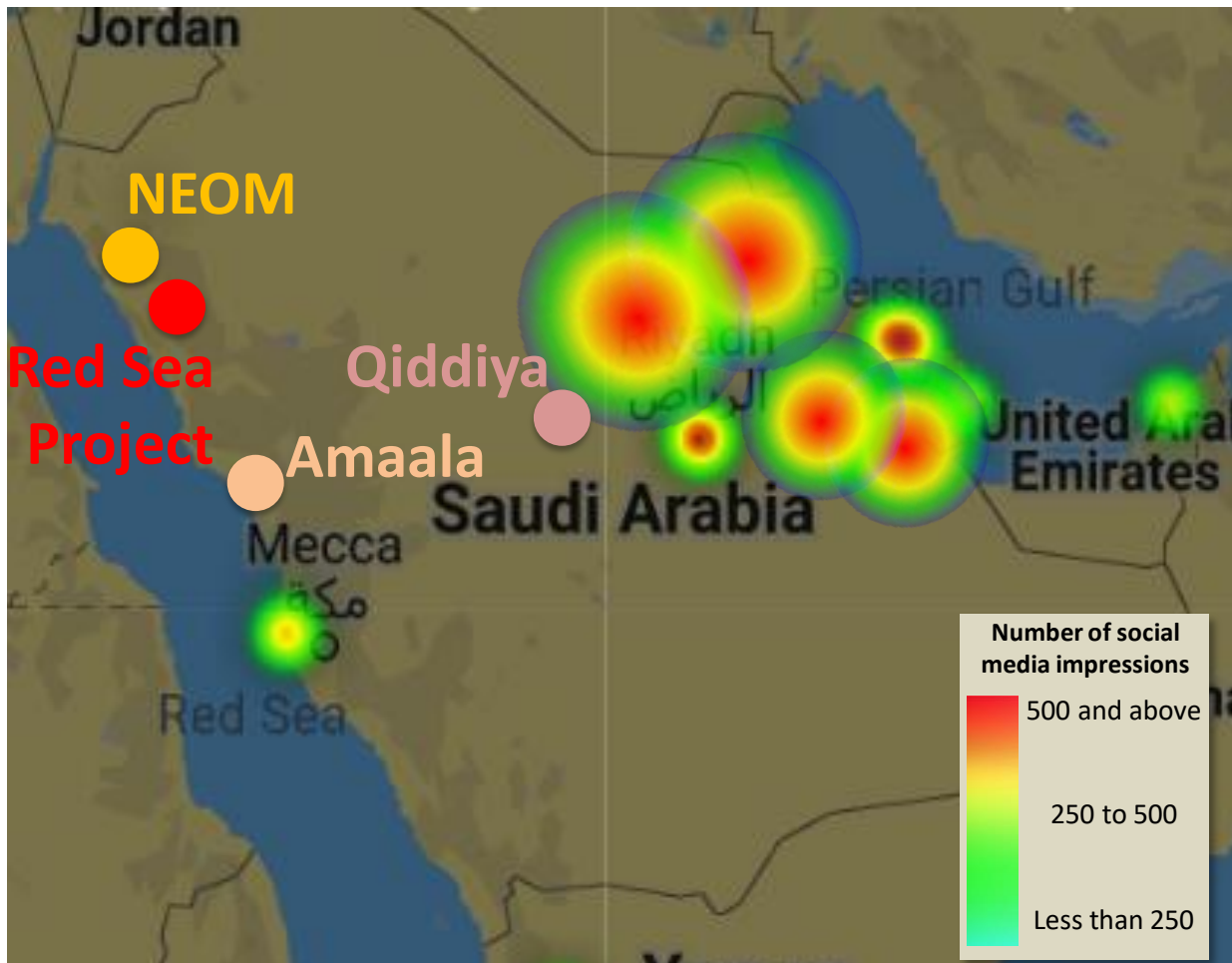


***“Most Saudi engineers are unemployed. Who works on these projects?
Why are the youth not given the opportunity?”*** *Yaser, [Twitter](#)*

Geographic Analysis

Heatmap of trending topics revealed location of online discussions about Giga Projects

- 86% of Giga Project discussions emanated from the eastern region
 - Only 14% of all conversations related to the Giga Projects were found around the locations of the Giga Projects—all located along the Red Sea Coast
- 62% of discussions pertaining to the NEOM and Amaala projects were found in the capital city Riyadh
- Only 21% of discussions pertaining to the Red City project emerged on the Red Sea area (e.g. Yanbu City)
- 81% of all discussions pertaining to the Qiddiya project emerged from Riyadh



Heatmap showing density of trending topics related to the Giga Projects

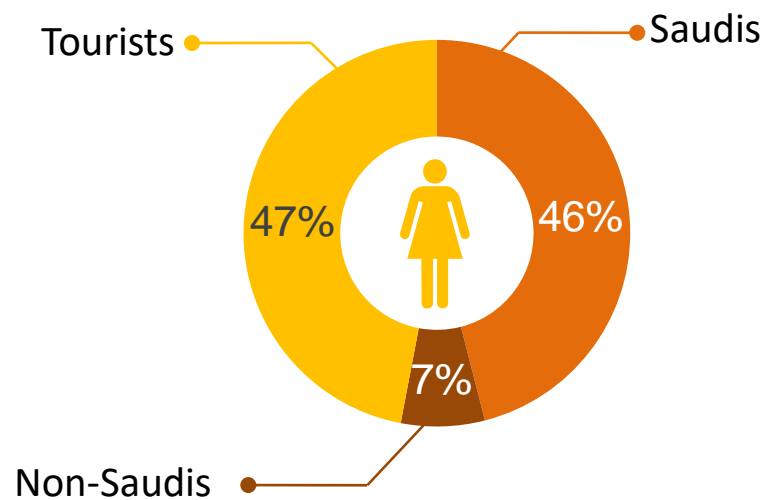
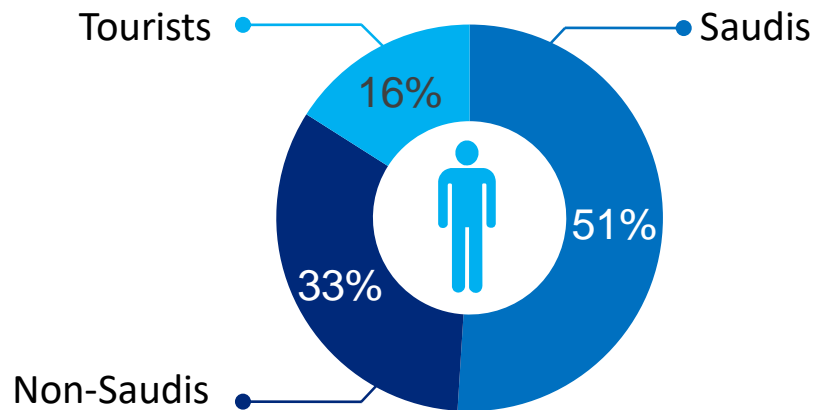
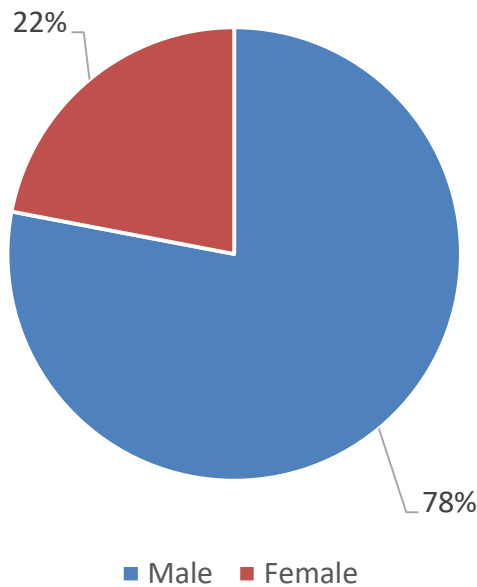
“This is all so wonderful but my real concern would be equality and liberty of all sexes. That's what the 2030 vision should focus on.” *Atheist Panda, [Twitter](#)*

Demographic Analysis

Revealed insights into the gender differences within social media discussions related to the Giga Projects:

- 78% of all social media discussions were made by men
 - 51% of these discussions were made by Saudi-born men, 33% by non-Saudi men (e.g. immigrants), and 16% were by male tourists (e.g., Egyptians, Jordanians, and Westerners)
- 22% of all social media discussions were made by women
 - Majority were by female tourists (47%), followed by Saudi-born women (46%), and a small percentage (7%) by non-Saudi women (e.g. female Indian nurses)

Social Media share across gender



“It is well known that: Mega Projects: Millions \$ projects, Giga Projects: Billions \$ Projects, Tera Projects: Trillions \$ Projects. Any other criteria (other than the cost)?” Turki Alnemr, [Twitter](#)

Key Influencers



Identified the top five (5) influencers currently shaping online public opinion, based on their social media reach (i.e. number of online users engaged). Saudi-based influencers fell outside the top five (e.g. Saudi Gazette 21, Riyadh Daily 27, and Al-Yaum Newspaper 36).

| Influence Rank [1= Highest, 5= Lowest] | Influencer | Online platform | Link to Online Profile |
|--|--------------------|-----------------|----------------------------|
| 1 | Al Jazeera Channel | Facebook | @AlJazeera |
| 2 | Chouf TV | Facebook | @ChoufTV |
| 3 | HESPRESS | Twitter | @HESPress |
| 4 | CNN Arabic | Twitter | @CNNArabic |
| 5 | Rassd News | Facebook | @RassdNews |

Impact of Key Influencers

Influencers were further analyzed to uncover the extent of their influence on online conversations about specific topics related to Giga Projects. Saudi-based influencers, both individuals and organizations, did not have a significant impact (i.e. score above 0.50).

| Influence Rank [1= Highest, 5= Lowest] | Influencer | Topics Influenced | Impact Score [0 = Low Impact, 1 = High Impact] |
|--|--------------------|-----------------------|---|
| 1 | Al Jazeera Channel | Employment, Cost | 0.91 |
| 2 | Chouf TV | Location, Employment | 0.82 |
| 3 | HESPress | Environment, Location | 0.73 |
| 4 | CNN Arabic | Cost, Employment | 0.67 |
| 5 | Rassd News | Cost | 0.57 |

“Projects and tourism plans will succeed only with the solidarity of the citizens of the nation to promote this country”   Abdullah, [Twitter](#)

Recommendations

Utilize ENODO Global’s dynamic “Social Listening” tools to continuously measure local, regional, and national public perceptions associated with each Giga Project in order to:

- Develop unified communications and engagement strategies that align Vision 2030 objectives, Giga Projects, and the beliefs of Saudi citizens across key demographic factors (e.g., geography, age, and gender)
 - Create a Master Narrative and micro-targeting to increase positive and decrease negative sentiment across all demographic groups and geographies
- Reinforce positive branding initiatives for each Giga Project, based on the Amaala and NEOM projects, that align to the perceptions and topics important to Saudi citizens
 - Demonstrate to Saudi citizens the individual benefits of each Giga project and how they support Saudi Arabia’s vision of the future
- Design a Giga Project for the Eastern Province to demonstrate the Kingdom’s resolve to the entire population.
 - The Giga project should address grievances by representing the distinct culture of the region and developing economic opportunity





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