

Saudi Arabia's Mega-City:

THE NEOM PROJECT

Overview Of Public Perceptions Towards “The Worlds Most Ambitious Project”

January 2019

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Prelude

The **NEOM** project has been billed as the “World’s Most Ambitious Project”. The \$500 billion project in the North-Western region of Tabuk aims at positioning the Kingdom of Saudi Arabia at the forefront of technology, innovation, tourism, and business-friendliness in the region.

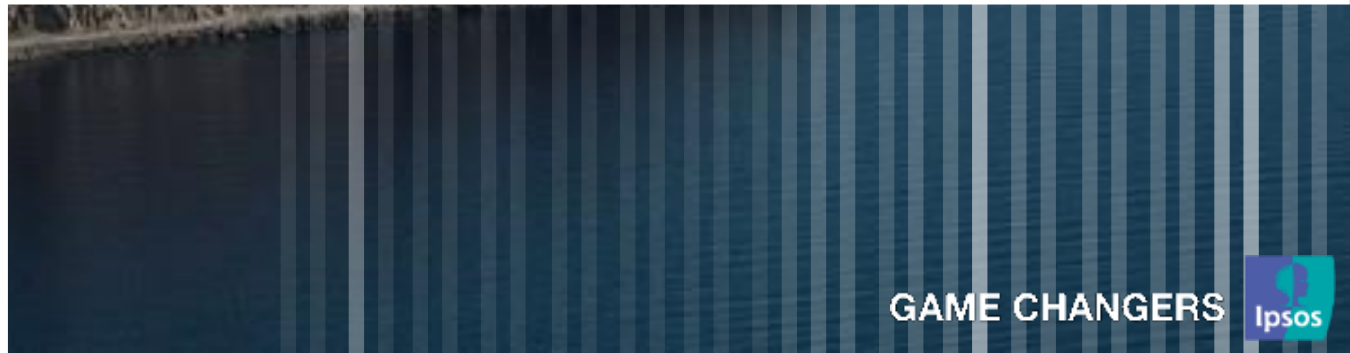
Given the importance of this project for Saudi Arabia, Ipsos in the Kingdom of Saudi Arabia conducted a survey to explore the perceptions and attitudes of residents in KSA towards the NEOM project, the impact that the public believe this project will have on the Kingdom, and future considerations regarding living, working, and vacationing in **NEOM**.

The survey was conducted by **Ipsos** using the **Ipsos** Online Panel in KSA, with a nationwide sample of 1,000 respondents aged 18 years and above, representative of the residents of Saudi Arabia.

This report summarizes the key results and findings.



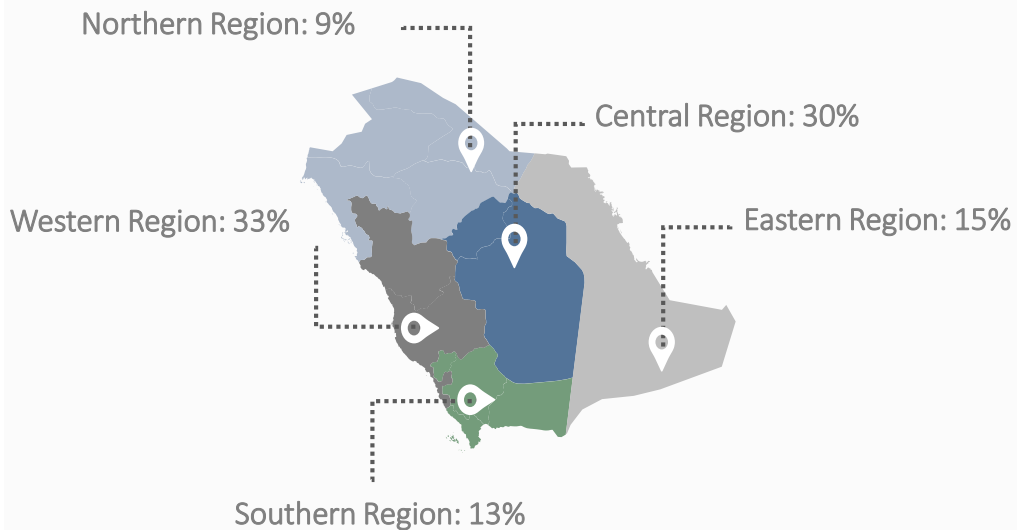
Sample & Methodology





Sample & Methodology

Where? Saudi Arabia



Sample Size



N=1000

Who?



Males 58%

Females 42%

2 Ages: 18 years and above

3 Nationalities:

Locals	70%
Arab Expats	20%
Other Expats (Asian + Western)	10%

How?



Online Self-administered Interviews

A close-up photograph of a person's eye, looking slightly to the right. The eye is dark brown with long, dark eyelashes. A semi-transparent green graphic overlay, consisting of several overlapping rectangular shapes, is positioned over the upper part of the eye and the eyebrow. The background is a soft, out-of-focus skin tone.

Overview

Overview

- Overall awareness levels towards NEOM are quite high, with 3 in 4 people having heard of the project, driven by TV, Online, and Social Media sources. However, a sizable percentage reported not being too familiar with its details.
- Perceptions towards the NEOM project were very positive, with 9 in 10 people reporting that NEOM puts Saudi Arabia on the right track for the future, and the majority also feel that the NEOM project is one that will make Saudi citizens proud, will create new job opportunities, and enhance the Kingdom's image worldwide.
- While many people reported having no concerns towards NEOM, those that did were primarily concerned about the possibility of the project's implication on the loss of Saudi identity, as well as concerns regarding the high costs of living in NEOM.
- When compared to other cities across the region, NEOM was predicted to supersede the top cities in MENA on numerous aspects, including technological advancement, education, tourism, and providing the best work and business investment environments, with the city of Dubai currently seen as the leading city currently holding the advantage over others.
- The high appeal levels held towards NEOM, and its perceived uniqueness both regionally and globally, have translated into high probability levels that residents in Saudi Arabia would consider working in NEOM, and visiting it as a tourist destination, once the project is complete.



Public Awareness

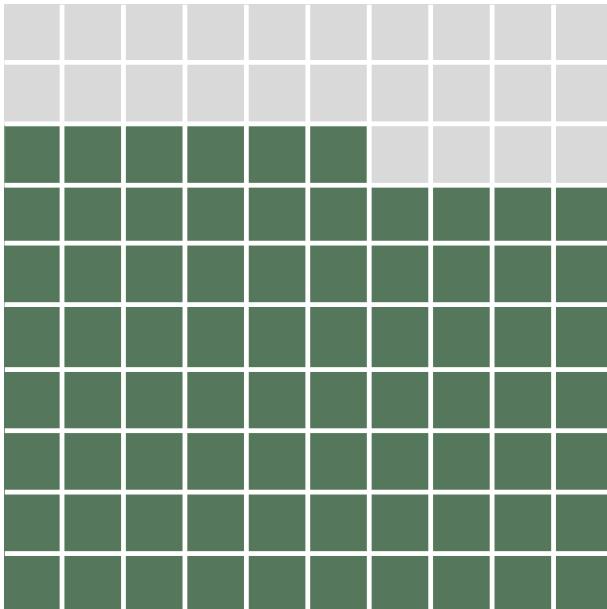
Awareness & Familiarity Of NEOM

8 In 10 residents of Saudi Arabia are aware and have heard of the NEOM Project. However, less than 4 In 10 claim to be familiar with the details of the project and what it entails on a spontaneous level.



Awareness Of Neom

76% Are *Aware/Have Heard*
Of The Neom Project



Of
Those
Who
Are
AWARE

...

Level Of Familiarity

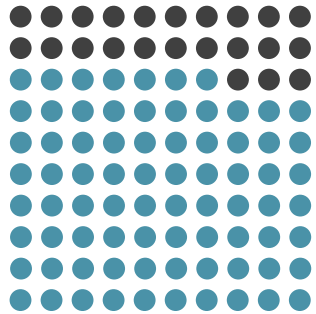
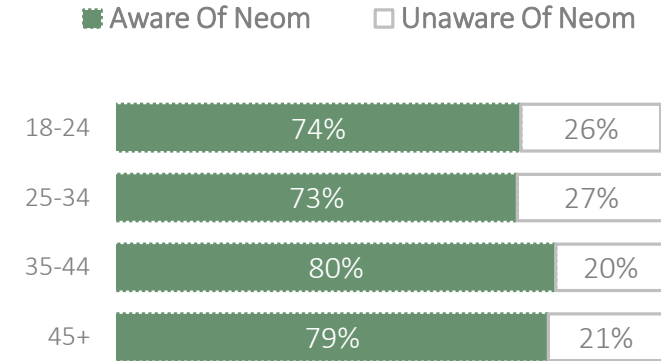
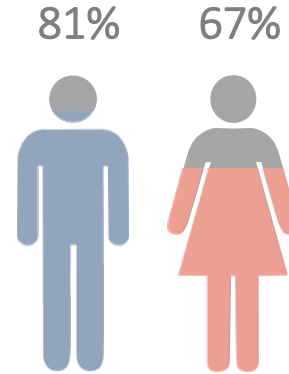
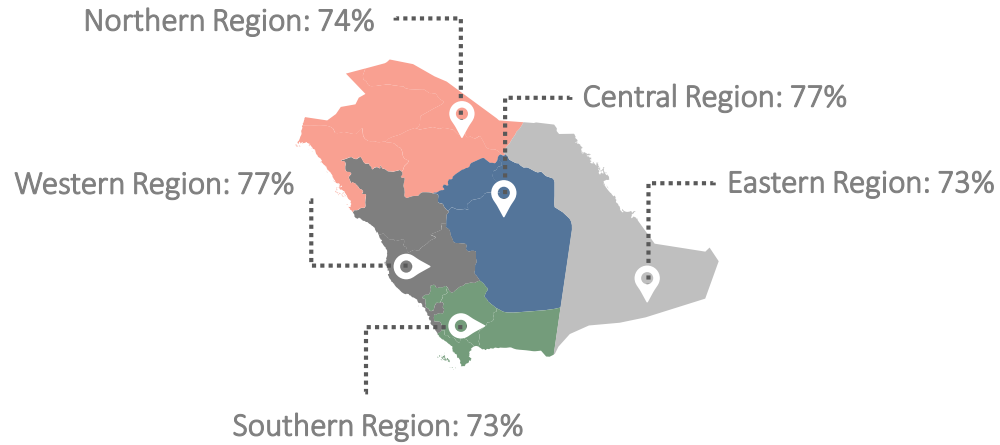
VERY Familiar With NEOM & Of What It Entails	22%
Familiar With NEOM & Of What It Entails	16%
Unsure	28%
Unfamiliar With NEOM & Of What It Entails	15%
VERY Unfamiliar With NEOM & Of What It Entails	20%

Awareness Of NEOM By Demographics

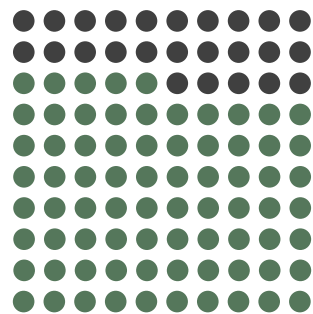


Awareness Of Neom

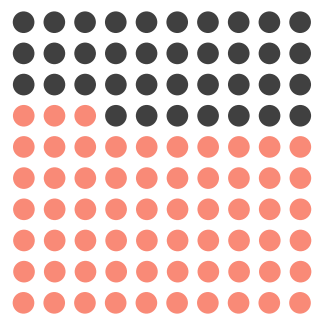
-By Region, Age, Nationality, Gender, & SEC



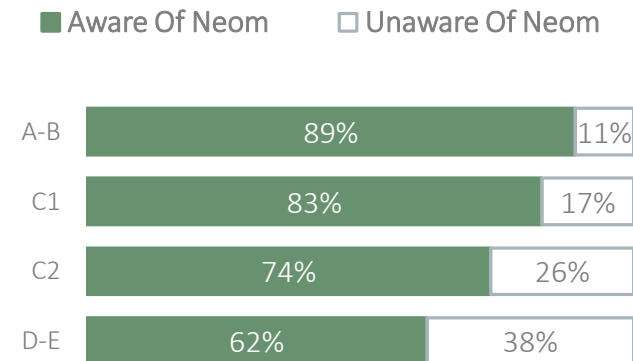
77%
Saudi Locals



75%
Arab Expats

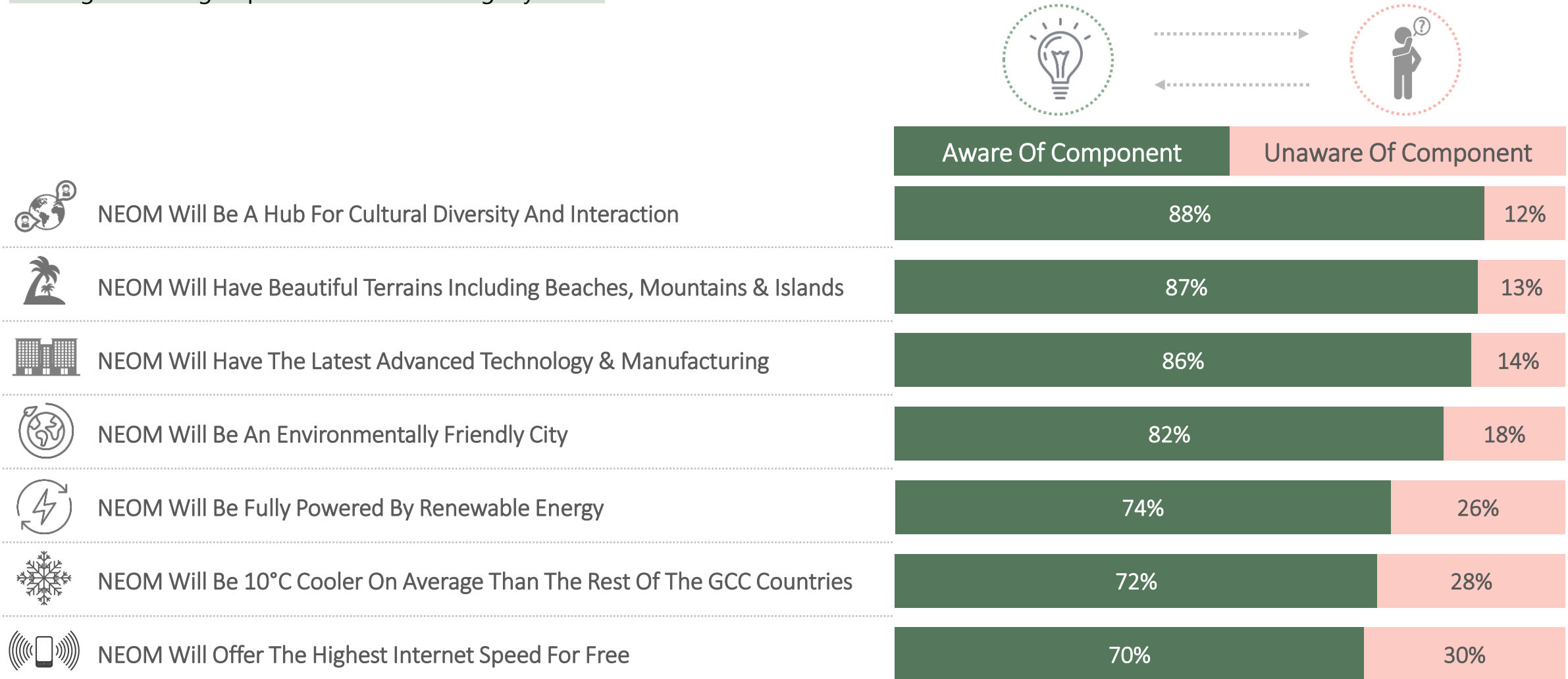


63%
Other Expats (Asians +
Westerners)



Awareness Of The Components Of NEOM

Among those who are aware of NEOM, the majority are generally aware of most of the project's core components; strong majorities reported being aware of NEOM's scenic nature, and that the Megacity will be a hub for cultural diversity. Awareness levels towards NEOM's cooler climates and its offering of free high-speed internet were slightly lower.



Sources Of Awareness Of NEOM

Traditional & Digital Media both played a big role in raising awareness levels of the NEOM project, with TV, Online Sources & Twitter being the top three sources of awareness.

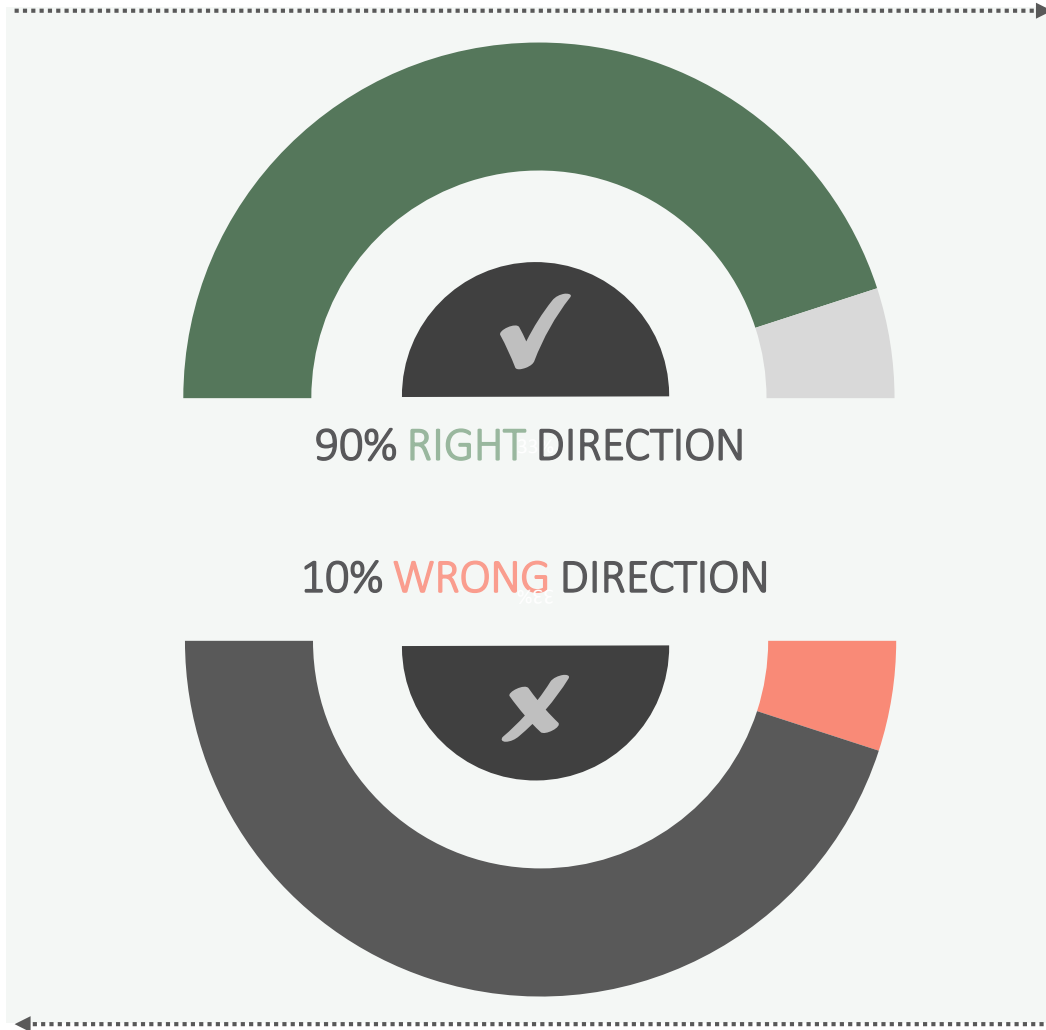




Perceptions of NEOM

Overall Impact On Saudi Arabia: Right Or Wrong Direction?

The overwhelming majority of people believe that the NEOM Project is a positive step that puts Saudi Arabia on the right track.



➤ *By Demographics*



Will Put KSA In
The **RIGHT** Direction



Will Put KSA In
The **WRONG** Direction

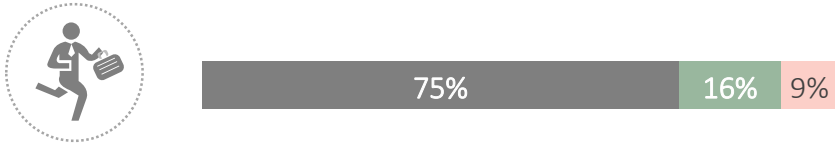
Western Region	86%	14%
Central Region	90%	10%
Eastern Region	93%	7%
Southern Region	95%	5%
Northern Region	91%	9%
18-24	89%	11%
25-34	91%	9%
35-44	86%	14%
45+	97%	3%
Male	90%	10%
Female	90%	10%
Local	89%	11%
Arab Expats	90%	10%
Other Expats	93%	7%
A-B	83%	17%
C1	90%	10%
C2	91%	9%
D-E	93%	7%

Implications Of NEOM Project

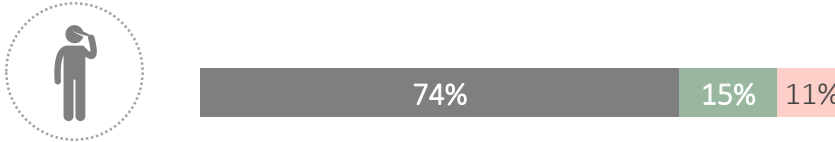
The majority believe that NEOM will be a source of pride for Saudi Nationals, improving the image of Saudi Arabia around the world, and will open doors for new job opportunities. Having said that, a slightly lower percentage believe NEOM will be home to people of all walks of life.

■ Agree ■ Unsure ■ Disagree

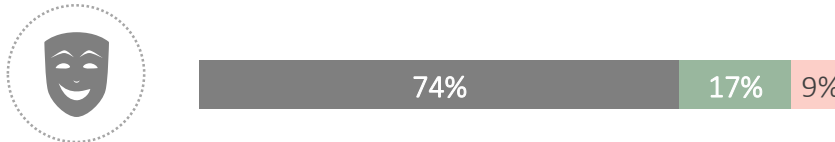
NEOM Will Open The Door For New Job Opportunities In Saudi Arabia:



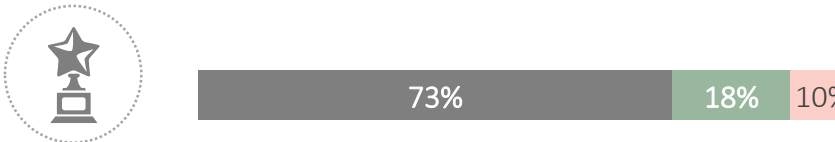
NEOM Will Make Saudi Nationals Proud:



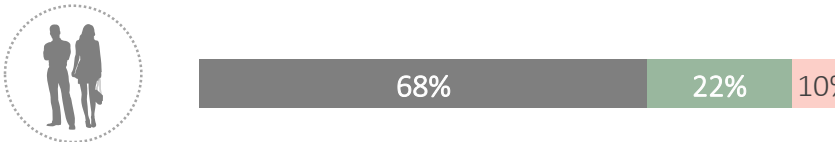
NEOM Improve The Image Of Saudi Arabia Around The World:



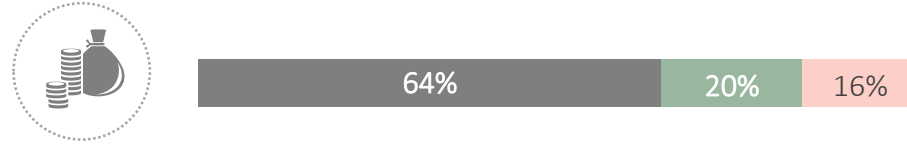
NEOM Will Attract Top Talent To Saudi Arabia:



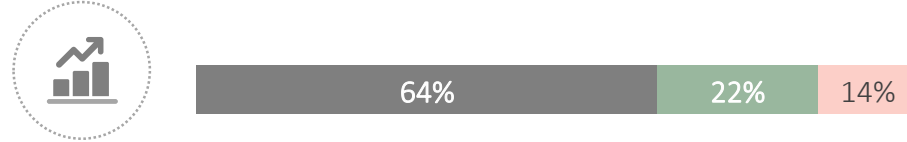
NEOM Will Be Mostly Inhabited By The Younger Adult Generations:



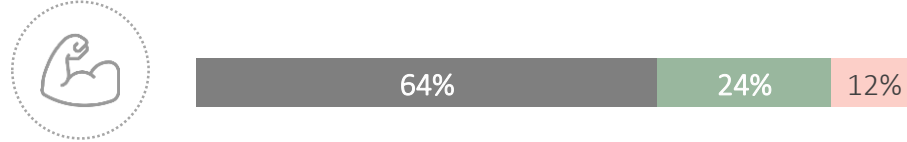
NEOM Will Result In Positive Economic Gains For Saudi Arabia:



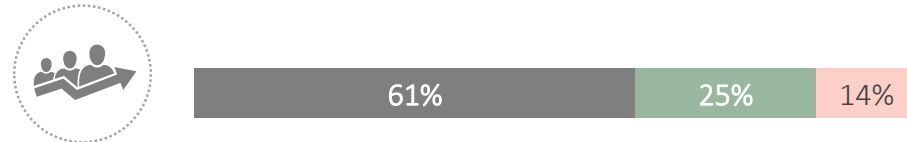
NEOM Will Result In Positive Economic Gains For The MENA Region:



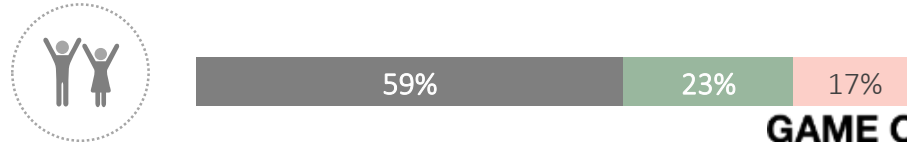
People Who Live In NEOM Will Be More Empowered:



Many Businesses Will Move Their MENA Headquarters To NEOM:

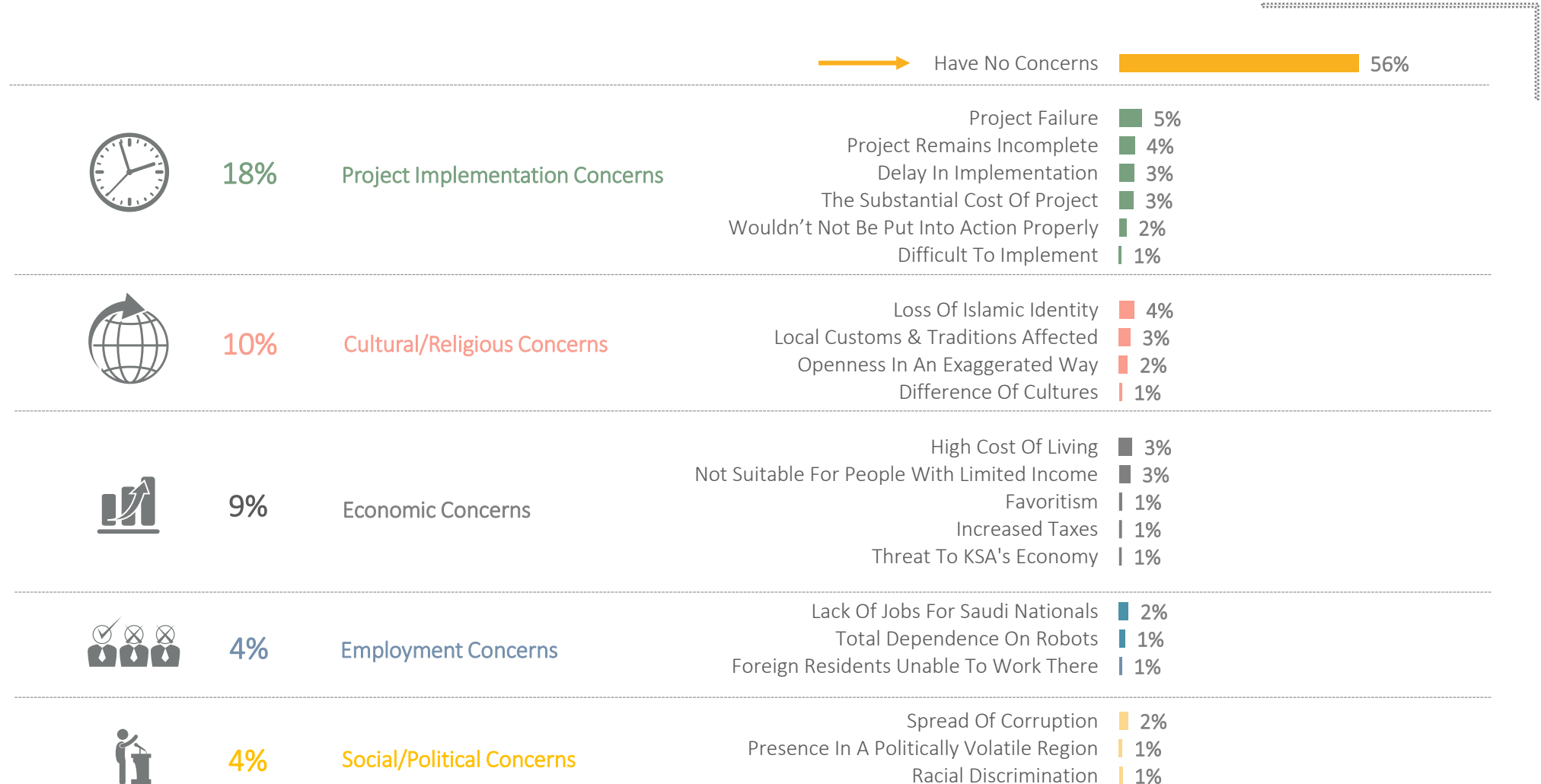


NEOM Will Be Home To People Of All Walks Of Life:



Public's Concerns About NEOM

The majority have no concerns regarding the development of NEOM. Among the rest, the biggest concerns were related to the completion and implantation of the project, along with concerns regarding how NEOM will affect Saudi Arabia's cultural and religious identity.

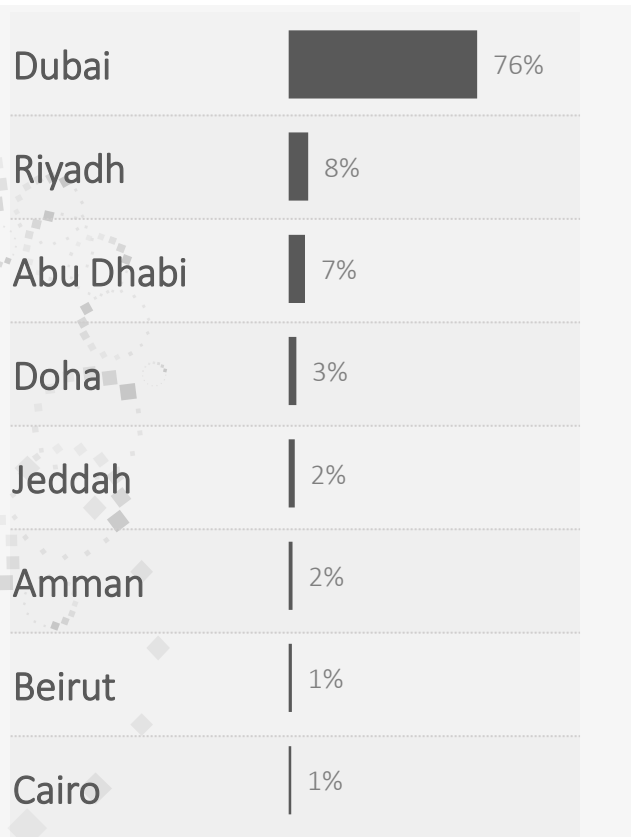




Technological Advancement: How NEOM Compares To Other Cities In The MENA Region

Dubai Is Considered The MENA Leader When It Comes Technological Advancement. That Said, **7 In 10** Believe That NEOM Will In fact Surpass Dubai In That Aspect.

Perceived Most Technologically Advanced City
In The MENA Region



➤ How Does **NEOM** Compare To The Top 3 Cities When It Comes To **Technological Advancement**?

- By Those Who Mentioned Each City



NEOM Will Be **MORE** Advanced



NEOM Will Be **THE SAME**



NEOM Will Be **LESS** Advanced

Dubai



Riyadh



Abu Dhabi

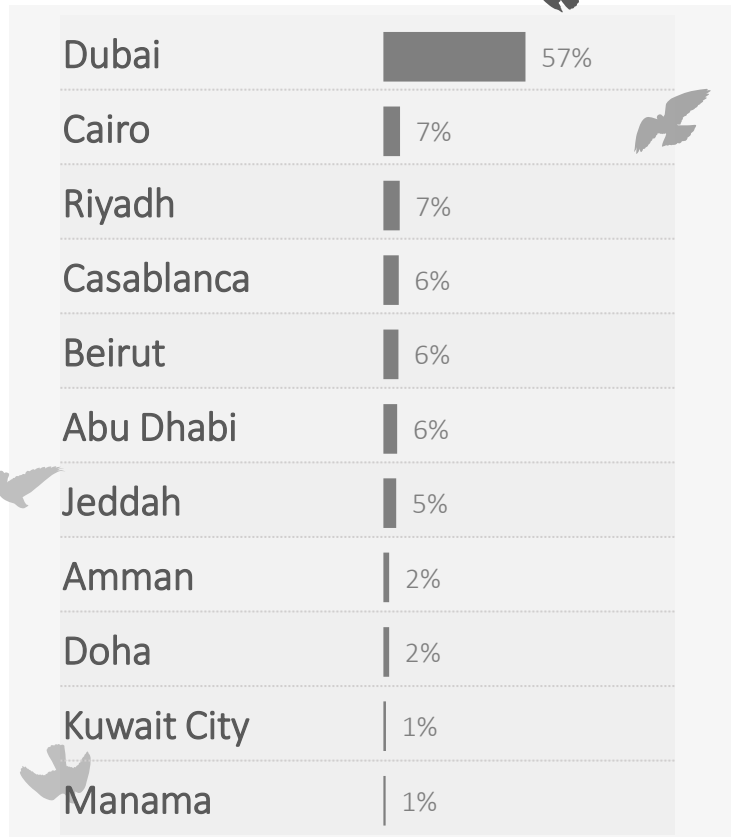




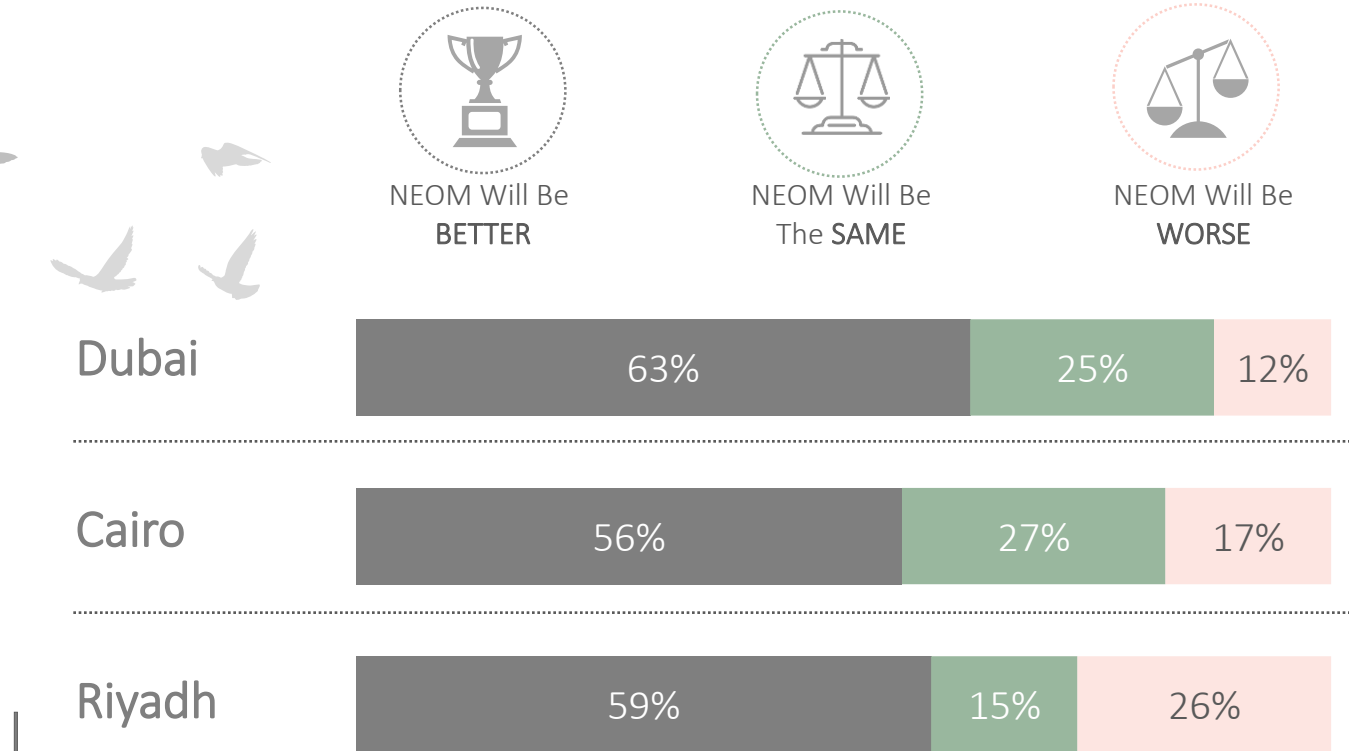
Tourism: How NEOM Compares To Other Cities In The MENA Region

On Average, 6 In 10 Claim That NEOM Will Be An Even Better Touristic Place Than The Top Ranked Best Cities in Tourism In MENA: Dubai, Cairo & Riyadh.

Best Perceived Tourist Destination In The MENA Region



- How Does **NEOM** Compare To The Top 3 Cities When It Comes To Being **The BEST** Place For Tourism?
- By Those Who Mentioned Each City

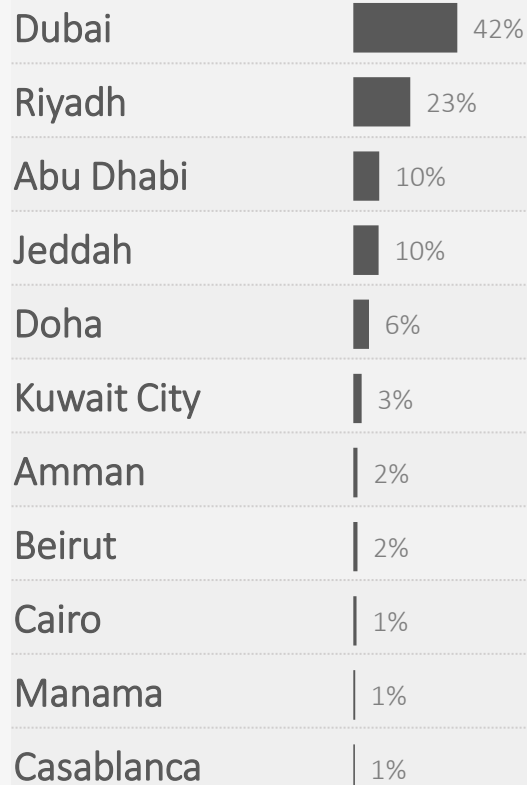




Business Environment: How NEOM Compares To Other Cities In The MENA Region

It Is Anticipated That NEOM Will Also Supersede Dubai- The Top Ranked City- When It Comes To Hosting A Favorable Environment For Work & Business.

Perceived City With Most Favorable Business Environment In The MENA Region



➤ How Does **NEOM** Compare To The Top 3 Cities When It Comes To Being **The Most Suitable Place To Work In?**

- By Those Who Mentioned Each City



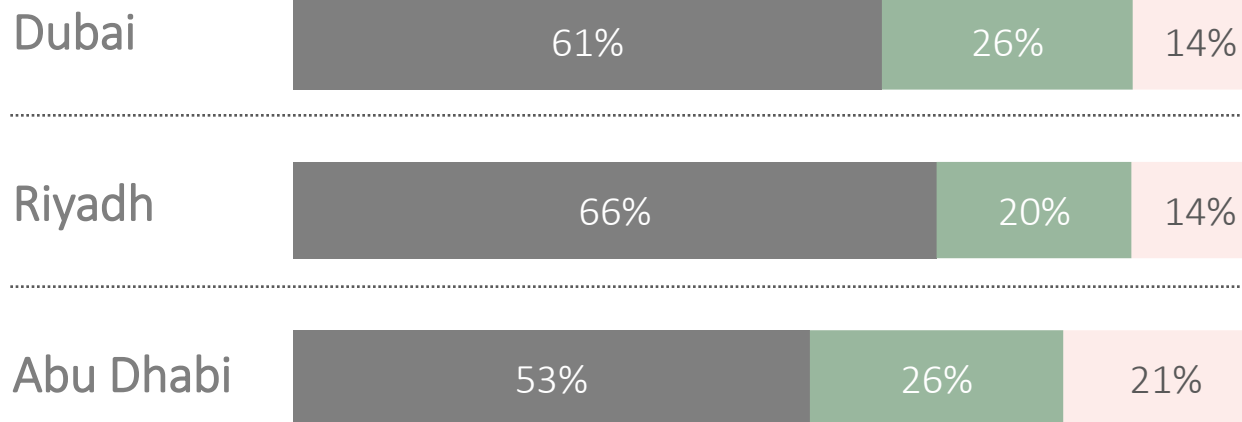
NEOM Will Be **MORE** Suitable



NEOM Will Be **The SAME**



NEOM Will Be **LESS** Suitable

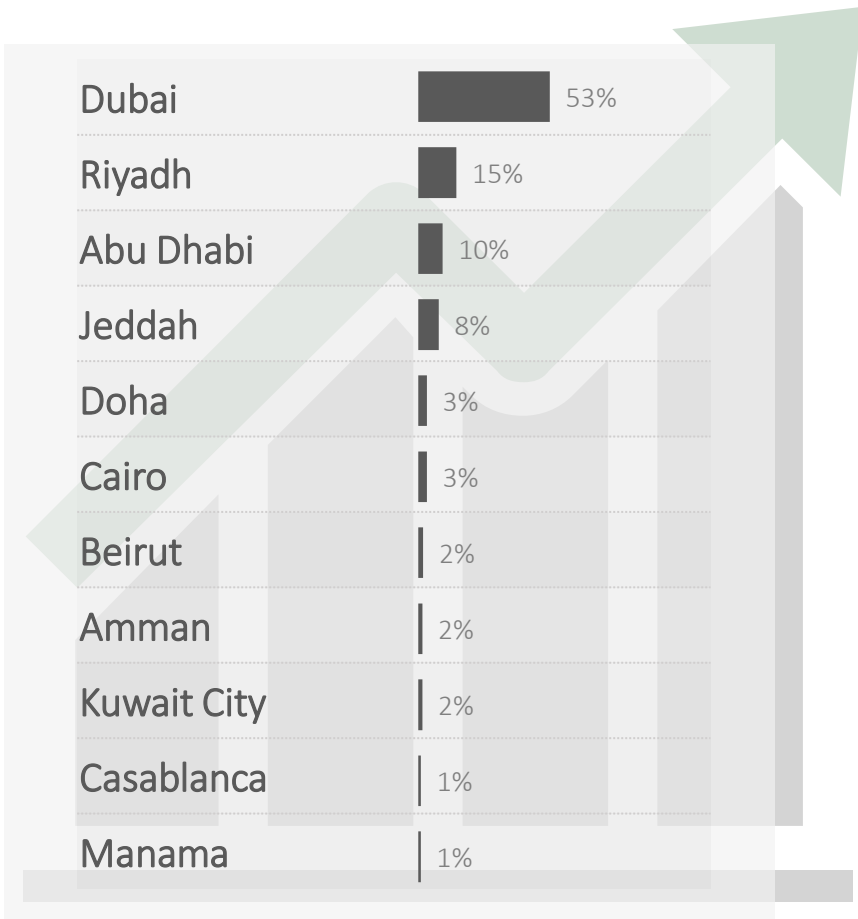




Business Investment: How NEOM Compares To Other Cities In The MENA Region

It Comes As No Surprise That **More Than Half** Claim That Neom Will Be Ideal For Business Investments- Better Than The Top In MENA: Dubai, Riyadh & Abu Dhabi.

Top Perceived City For Business Investments
In The MENA Region



➤ How Does **NEOM** Compare To The Top 3 Cities When It Comes To Being **The Best For Business Investments?**

- By Those Who Mentioned Each City



NEOM Will Be
BETTER



NEOM Will Be
The **SAME**



NEOM Will Be
WORSE

Dubai



Riyadh



Abu Dhabi

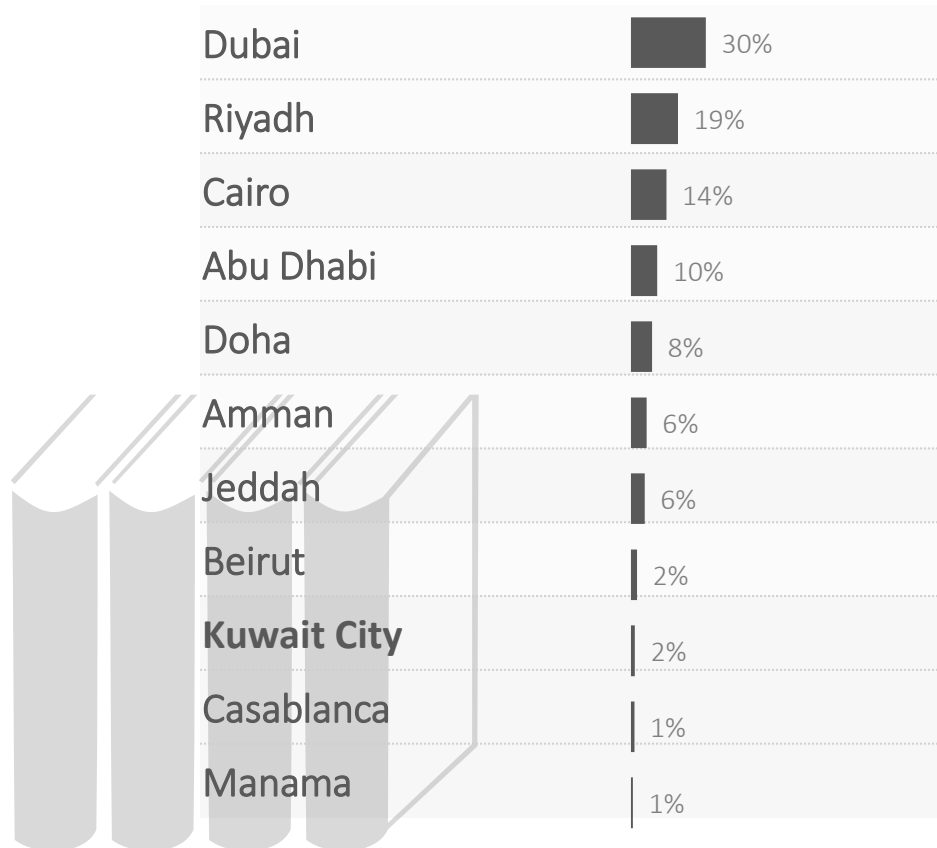




Education: How NEOM Compares To Other Cities In The MENA Region

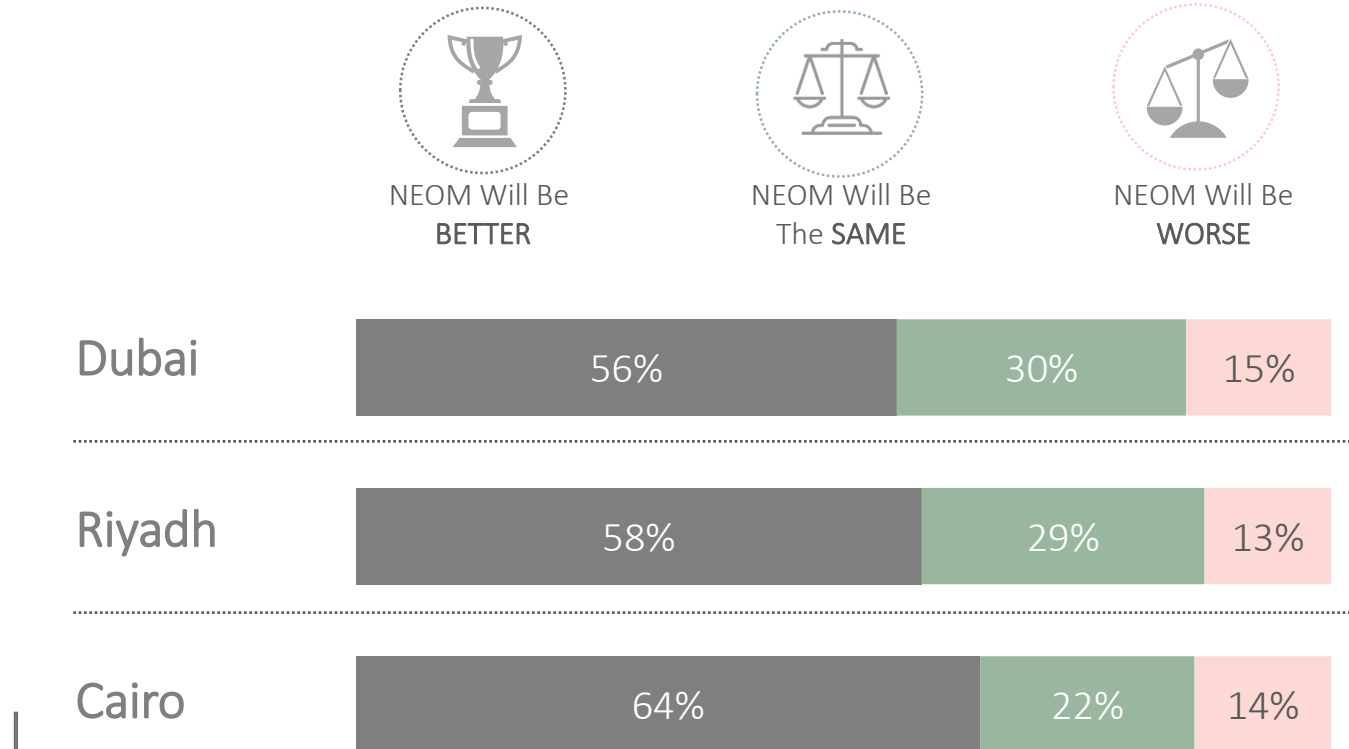
6 In 10 Saudis Claim That NEOM Will The Best In Education In The MENA Region.

Best Perceived City For Education
In The MENA Region



➤ How Does **NEOM** Compare To The Top 3 Cities When It Comes To Being **The Best In Education**?

- By Those Who Mentioned Each City

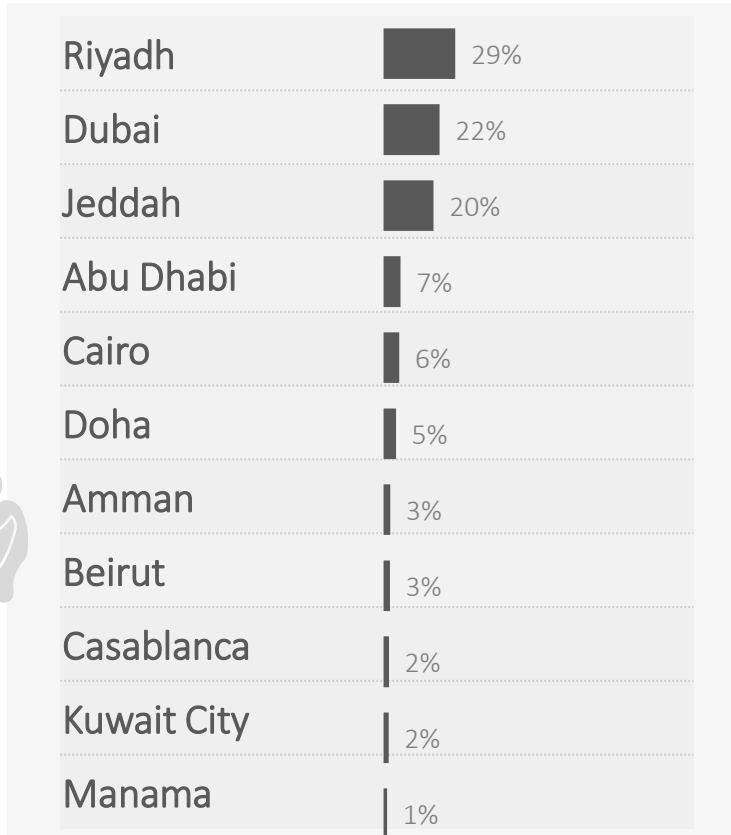




Family Upbringing: How NEOM Compares To Other Cities In The MENA Region

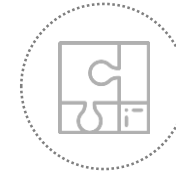
Riyadh Is Considered To Be The Ideal Place In MENA To Raise A Family, That Said, **7 In 10** Believe That Riyadh Will Become The 2nd After The Emergence Of NEOM.

Best Perceived City For Raising A Family In The MENA Region



How Does NEOM Compare To The Top 3 Cities When It Comes To Being The Most Suitable To Raise A Family?

- By Those Who Mentioned Each City



NEOM Will Be
MORE Suitable



NEOM Will Be
The **SAME**



NEOM Will Be
LESS Suitable

Riyadh



Dubai



Jeddah





Concept Evaluation

NEOM Concept Evaluation

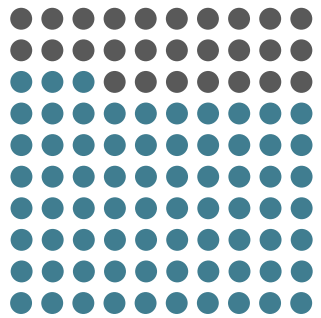
The below concept was presented to respondents, after which they were asked about the concept's **Appeal, Relevance & Uniqueness** (regional and global)

NEOM is a Megacity located in Northwestern Saudi Arabia, covering an area of 26,500 Km² bordering Jordan and Egypt. It will be the world's first independent special zone that spans three countries. NEOM will be a center of cultural diversity and international activity, and aims to be the leading global hub for technology, advanced manufacturing and robotics. The Megacity will be home to thriving businesses and will host world class working and living conditions. It will be fully powered by renewable energy, and will utilize the latest advancements in agriculture. NEOM will also be a touristic destination, offering guests access to pristine beaches, mountains and islands, and a relatively cooler climate that is 10°C lower than other GCC cities. It also offers the latest in futuristic housing accommodations and will lead in innovations in infrastructure and construction.



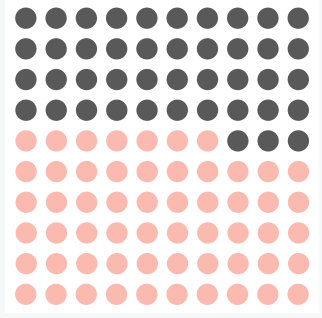
Concept Appeal

72% Consider The Concept Appealing



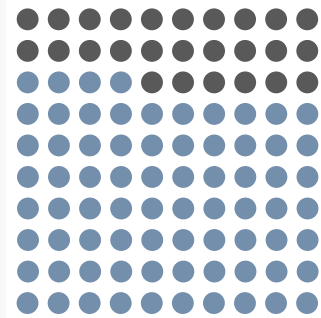
Concept Relevance

57% Consider The Concept To Be Relevant To Their Needs & Lifestyle



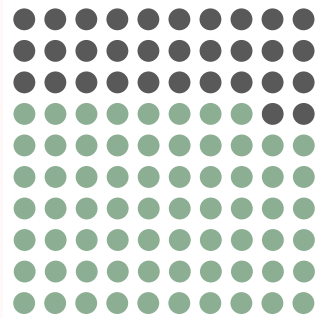
Concept Uniqueness Regionally

73% Consider The Concept To Be Unique Relative to Other Cities In The Middle East



Concept Uniqueness Globally

68% Consider The Concept To Be Unique Relative to Other Cities In The World



NEOM Concept Evaluation: Who Thinks What?



Appeal, Relevance & Uniqueness Of The NEOM Concept By Demographics - By Region, Age, Nationality, Gender, & SEC

72%



57%



73%



68%

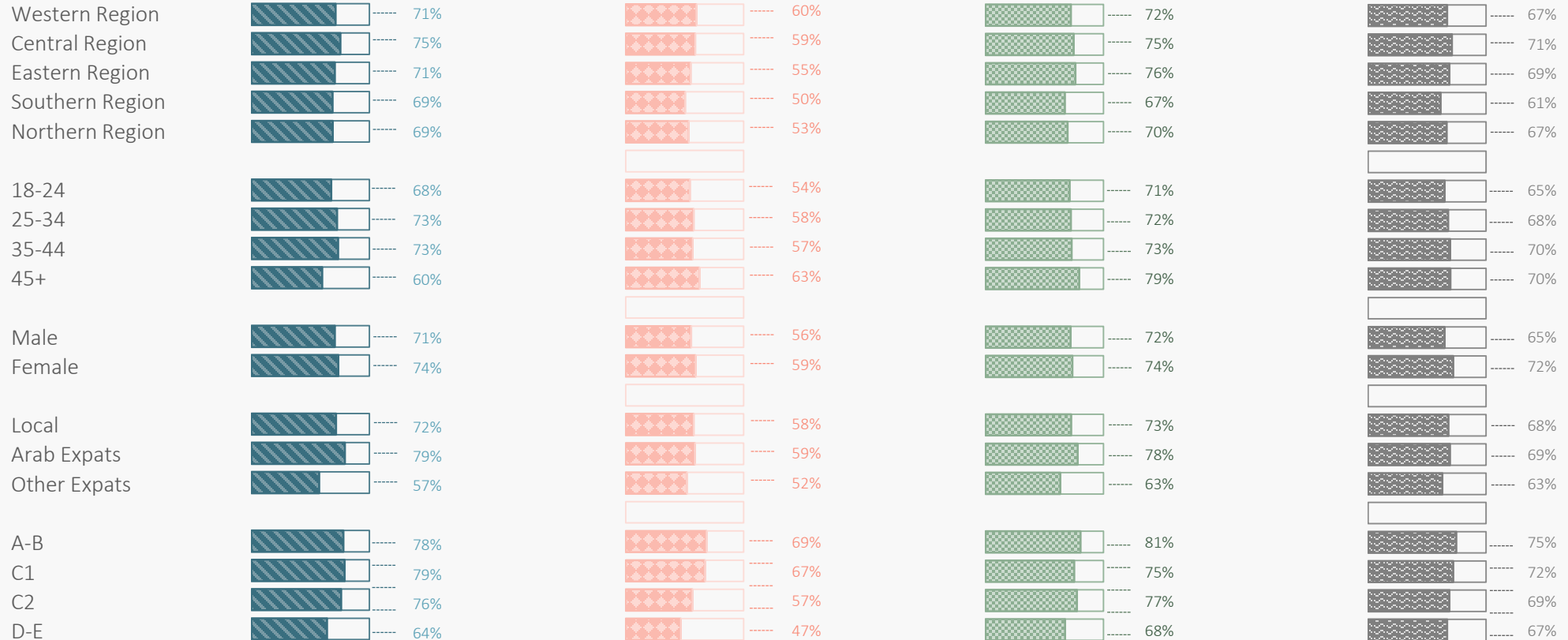


Considered NEOM **Appealing**

Considered NEOM **Relevant To Their Needs & Lifestyle**











































































Considered NEOM **Unique Relative To Other Cities In The Middle East**

Considered NEOM **Unique Relative To Other Cities In The World**



Evaluating The Components Of The NEOM Concept

After reading the concept, respondents were then asked to select the one component of the concept which they “Liked Most”, “Liked Least”, the component they find to be “Most Unique/New”, and the component they think is “Most Challenging To Implement”.

					
Concept Component		Most Liked	Least Liked	Most Unique/New	Most Challenging To Implement
	The Leading Global Hub For Technology, Advanced Manufacturing & Robotics	 16%	 5%	 17%	 12%
	World Class Working And Living Conditions	 11%	 4%	 6%	 7%
	Powered By Renewable Energy	 10%	 5%	 15%	 12%
	Pristine Beaches, Mountains & Islands	 10%	 5%	 5%	 6%
	The World’s First Independent Special Zone	 10%	 8%	 12%	 7%
	Located In The Northwestern Region Of Saudi Arabia Bordering Jordan & Egypt	 9%	 8%	 7%	 4%
	A Center Of Cultural Diversity	 6%	 6%	 5%	 5%
	<i>Nothing In Specific</i>	 6%	 24%	 7%	 16%
	Home To Thriving Businesses	 5%	 4%	 4%	 3%
	International Activity	 5%	 6%	 5%	 6%
	Cooler Climate	 4%	 12%	 5%	 10%
	Innovations In Infrastructure & Construction	 4%	 3%	 6%	 5%
	Latest In Futuristic Housing Accommodations	 2%	 5%	 3%	 4%
	Utilize The Latest Advancements In Agriculture	 2%	 4%	 3%	 3%



Future Intentions

Public's Opinion On Who Would Live In NEOM

The majority of people think that NEOM will mostly be occupied by Saudi Nationals, but significant percentages also believe that the city will also attract Western and Arab expats.



Opinions On Who Will Occupy NEOM - By Nationality -

Saudi Nationals 69%

Western Expats 38%

Arab Expats 38%

Other Expats 29%

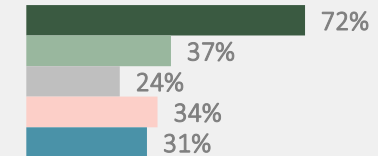
Asian Expats 25%



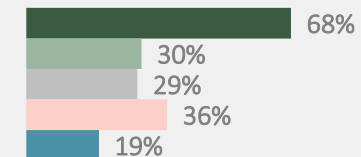
Who Thinks What? Who Will Occupy NEOM- Nationals Vs. Expats

■ Saudi Nationals ■ Arab Expats ■ Asian Expats ■ Western Expats ■ Other Expats

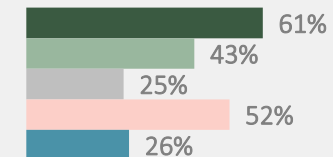
Saudi Nationals
Think That NEOM Will be Mostly Inhabited By:



Other Expats (Asian + Western Expats)
Think That NEOM Will be Mostly Inhabited By:



Arab Expats
Think That NEOM Will be Mostly Inhabited By:



Future Intentions

Approximately two-thirds of people mention that they would consider going to NEOM on vacation, and would also consider seeking employment in NEOM. However, just below half report considering living in NEOM.



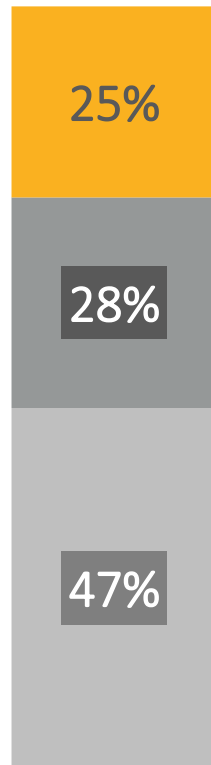
Going On
Vacation To
NEOM:



Consider Seeking
Employment
In NEOM:



Consider
Living
In NEOM:



■ Unlikely
■ Unsure
■ Likely

By Demographics



Those Likely To Go On
Vacation
To NEOM



Those Likely To Seek
Employment
In NEOM



Those Likely To Live
In NEOM

	Those Likely To Go On Vacation To NEOM	Those Likely To Seek Employment In NEOM	Those Likely To Live In NEOM
Western Region	66%	63%	49%
Central Region	69%	59%	46%
Eastern Region	61%	55%	43%
Southern Region	63%	62%	46%
Northern Region	66%	59%	48%
18-24	60%	58%	45%
25-34	66%	60%	46%
35-44	68%	65%	52%
45+	69%	55%	44%
Male	63%	61%	43%
Female	70%	59%	5%
Local	66%	57%	45%
Arab Expats	62%	72%	54%
Other Expats	69%	60%	47%
A-B	70%	63%	55%
C1	69%	68%	47%
C2	71%	60%	48%
D-E	59%	58%	42%



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At Ipsos we are passionately curious about people, markets, brands and society. We make our changing world easier and faster to navigate and inspire clients to make smarter decisions. We deliver with security, simplicity, speed and substance.

We Are Game Changers

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GAME CHANGERS

