

دراسة استكشافية حول بناء الوعي بالعلامة التجارية لشركات الطلاء الواقية متعددة الجنسيات في
سوق المشاريع الكبرى في المملكة العربية السعودية

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**An Exploratory Study on Building Brand Awareness for Multinational
Protective Coatings Companies in Saudi Arabia's Giga Projects Market**

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Abstract

The research explores marketing methods which multinational protective coatings organizations can use to increase their brand recognition in Saudi Arabia's fast-growing giga infrastructure market. Large-scale infrastructure developments that Saudi Arabia has initiated under Vision 2030 particularly NEOM and the Red Sea Project along with Qiddiya have created an escalating need for high-quality protective coatings throughout the construction sector and industry. The analysis explores Saudi Arabia's brand awareness trends by revealing crucial market obstacles alongside possibilities that impact multinational companies while trying to position their brands in Saudi Arabia's competitive market environment. Strategic marketing measures receive analysis through market research and expert interviews to identify brand perception factors and enhance visibility levels and reputation status. The research intends to supply crucial findings and practical recommendations that support international companies in building robust brand visibility and lasting relationships in Saudi Arabia's giga projects sector.

المخلص :

تهدف هذه الدراسة إلى استكشاف كيفية بناء الوعي بالعلامات التجارية بشكل فعال لشركات الطلاء متعددة الجنسيات في قطاع البناء السعودي المتنامي، خاصة في إطار مشاريع رؤية 2030. يستخدم البحث منهجية مدمجة تشمل كلاً من الأساليب النوعية (المقابلات مع خبراء الصناعة ومديري المشاريع وضباط المشتريات) والأساليب الكمية (استطلاعات تستهدف المهنيين من مختلف قطاعات صناعة البناء). يركز البحث على المهنيين المشاركين في المشاريع الكبيرة مثل نيوم، القدية، وملاعب كأس العالم 2034. تكشف النتائج أن أداء المنتج، المتانة، والدعم الفني هي العوامل الرئيسية التي تؤثر في اختيار علامات الطلاء الواقية. كما تبين أن استراتيجيات التسويق مثل الزيارات المباشرة من قبل المبيعات ورعاية الفعاليات الصناعية كانت الأكثر فعالية في زيادة الوعي بالعلامة التجارية. تسلط الدراسة الضوء على التحديات التي تواجهها الشركات متعددة الجنسيات عند دخول السوق السعودي، بما في ذلك المنافسة، الحواجز الثقافية، وضرورة تبني استراتيجيات تسويق محلية. يسهم هذا البحث في تقديم رؤى قيمة حول ديناميكيات بناء العلامات التجارية في سياق صناعة البناء السعودية المزدهرة ويوفر توصيات عملية لشركات الطلاء متعددة الجنسيات التي تسعى لتوسيع وجودها في هذا السوق.

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Chapter 1 : Introduction

1. Introduction:

Giga construction projects now find their primary destination in Saudi Arabia because of the HH Mohammad Bin Salman 2030 Vision. Twenty projects worth more than \$900bn ⁽¹⁾ constitute Giga initiatives throughout infrastructure and Industrial development and educational arenas as well as healthcare initiatives, urban development and tourism components intended to establish Saudi Arabia as a world economic leader.

The Vision 2030⁽¹⁴⁾ initiative has received substantial funding from Saudi Arabia for its giga projects till March 2025.

These projects serve to enhance Saudi Arabia's economic stability by establishing a worldwide tourism center and innovative entertainment center. Notable investments include:

4. NEOM represents a \$500 billion development of The Line alongside Trojena to establish an advanced high-tech urban center. ⁽²⁾
5. Qiddiya represents a \$9.8 billion dollar investment in building an entertainment center outside Riyadh to blend cultural attractions with recreation amenities. ⁽²⁾
6. Red Sea Global: An investment of \$23.6 billion in tourism and luxury developments along the Red Sea coast. ⁽²⁾
7. The Diriyah Gate project worth \$63.2 billion seeks to establish Diriyah as both a historical and cultural center. ⁽²⁾
8. King Salman Park receives \$23 billion dollars to establish a massive urban park across Riyadh while developing its green and recreational areas. ⁽²⁾
9. The construction of Expo 2030 Site requires \$7.8 billion to make Riyadh ready for World Expo 2030. ⁽²⁾

The Kingdom runs these investments as part of a nationwide initiative to both update infrastructure and put monetary firepower behind economic fueling and oil revenue diversification. ⁽¹⁵⁾

The actual payment schedule for these projects likely will experience changes throughout their development phase with several projects possibly needing modifications or experiencing time delays.

To achieve these initiatives the project requires advanced materials and technology with various coating and paint types that both protect its properties and establish the exceptional visual theme between Heritage and Modernity elements. Therefore, protective coatings guarantee extended durability and sustainable operation of these Iconic Projects.

Leading protective coating companies worldwide face amazing business prospects within Saudi Arabia's construction sector although they encounter numerous market difficulties in this market.

Brand awareness development in this demanding market becomes essential because it helps companies win market share positions while also gaining trust as Saudi Arabia's major development partners.

Research investigates the branding strategies and tactics protective coatings industries use to expand their awareness within the Saudi Arab Construction sector. The research investigates factors that shape brand perception and positioning through current branding strategy analysis to generate new optimization recommendations which enhance brand recognition for targeted market segments.

The examination of Saudi Arabian construction market dynamics together with cultural factors and themes and regulations alongside technological developments will offer guidance for multinational companies to succeed within this market.

The research seeks to broaden understanding regarding international marketing tactics as well as brand administration and market access techniques for evolving international markets. Such sections detail the specific obstacles multinational corporations encounter along with explaining why this research matters before showing its goals and survey questions.

Subsequently, theoretical perspectives receive attention followed by an explanation of research methods and final recommendations for action.

2. Problems of the study:

The protective coatings industry operates with multiple barriers when it comes to expanding brand familiarity throughout Saudi Arabian construction sites.

Several major difficulties prevent multinational firms from successfully exploiting the substantial number and size of opportunities created through Vision 2030's⁽¹⁴⁾ Giga projects despite such abundant opportunities.

Branding and marketing strategies need tailored adaptation in line with Saudi Arabian cultural elements. Multinational companies require knowledge about cultural restrictions as well as preferences that enable them to focus their resources with maximum effectiveness.

Saudi Arabian regulatory standards appear distinct to international companies because their business ethics contrast from common international standards.

The need to follow local rules and legislations increases the operational challenges of market entry and implementing business strategy.

The Saudi Arabian building materials sector attracts heavy competition since domestic firms together with international operators aggressively pursue market control.

Some obstacles arise when companies must compete for market dominance which requires both strategic branding methods alongside successful communication approaches.

The development of branding recognition means establishing mutual trust relationships with essential stakeholders starting from developers through contractors to consultants and Clients.

The development of favorable brand recognition that matches Saudi Arabian standards demands accurate execution along with careful strategic planning.

Understandings of the mentioned challenges demand thorough research about regional market dynamics together with customer behavior patterns and main companies and important parties and cultural customs and competitive postures as well as Saudi Arabia national objectives.

Understandable problems have been evaluated to provide guidelines and recommendations that allow multinational protective coating companies to build strong brand awareness in Saudi Arabia building materials sector.

3. importance of the study:

The study possesses value because it offers important recommendations along with strategic guidelines for multinationals which seek to develop brand presence in Saudi Arabia's protective coatings market. Significant importances such as:

Market and business development has surged from Vision 2030's implementation of broad Giga projects which seek to transform both infrastructure and economic development. Constructing strong brand awareness throughout the Saudi market becomes essential for worldwide protective coatings companies who aim to seize these expansion opportunities.

The Saudi Arabian market presents distinct cultural aspects and regulatory requirements which create obstacles for new companies entering the market. The research investigates these market factors to produce solutions that transform challenges into opportunities through an analysis of both factors and their transformation paths.

Construction materials market in Saudi Arabia faces intense competition from multiple local and international companies that compete for both contracts and partnerships.

Companies that effectively implement brand awareness strategies distinguish themselves from competitors because they become favored partners in large projects and secure more clients which gives them a better competitive market position.

Beyond immediate commercial needs this research delivers substantial economic value and intellectual findings for global business operations. This research explores brand awareness development complexities in the Saudi and middle eastern markets which enables multinational companies to better grasp their challenges so they can capitalize on growth opportunities to assist with Saudi economic development.

4. Analysis of Saudi Arabia's Giga Projects Investment:

Saudi Arabia has launched its Vision 2030 program as an extensive strategy to develop different economic branches beyond oil production. Multiple "giga projects" serve as foundational elements of this vision to establish Saudi Arabia as an international hub for tourism along with technology and business and cultural activities. These projects demand hundreds of billions of dollars from investors who focus their investments between infrastructure development and tourism and sustainable growth.

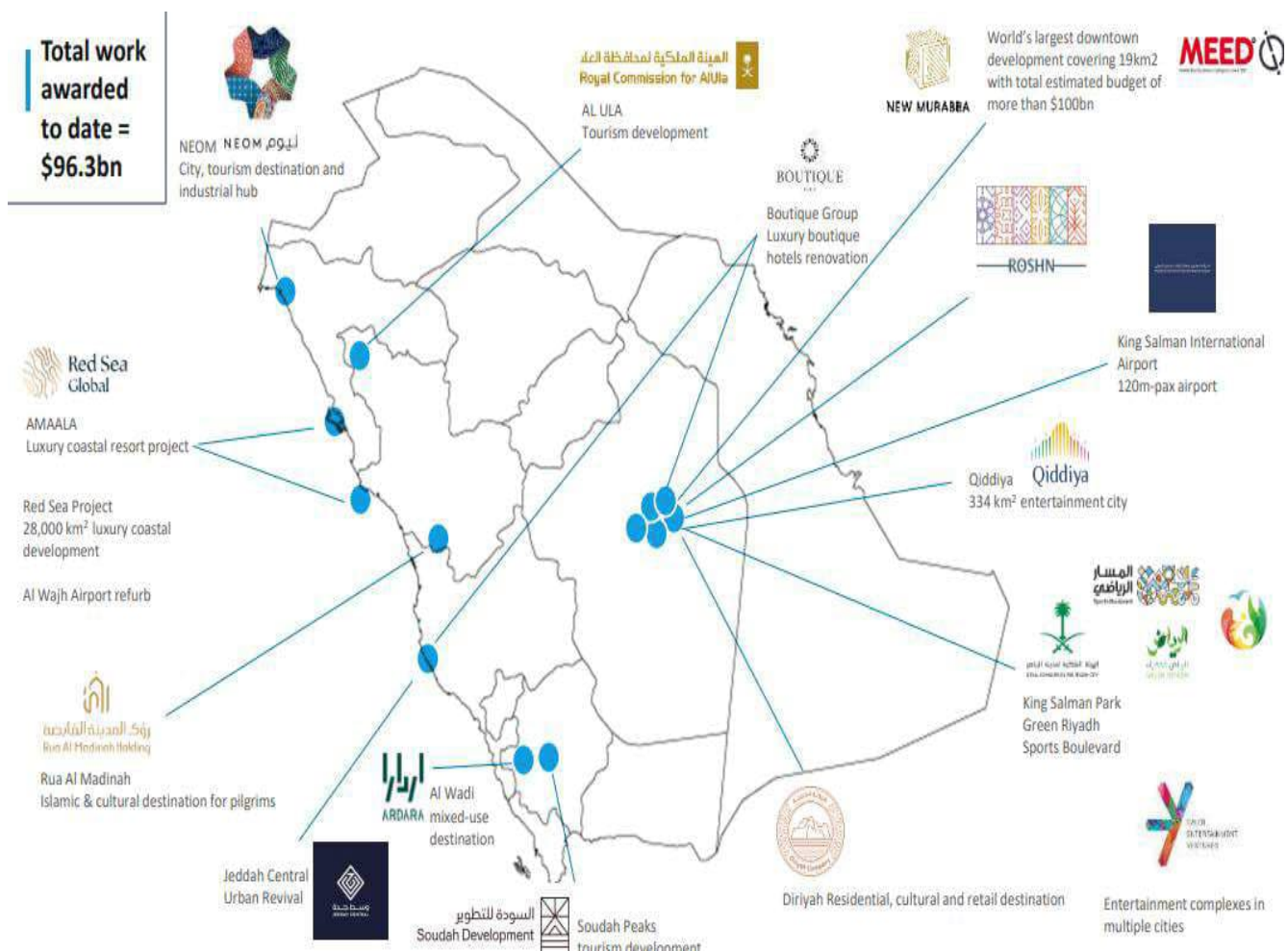


Figure 1-4-0 : MEED website

1. NEOM: A Futuristic City ⁽³⁾

The \$500 billion NEOM project features The Line which has designs for a car-free city and Trojena which consists of a desert ski resort. The project strives to establish itself as the initial city which runs exclusively from renewable power while implementing modern technologies across different fields including biotechnology and entertainment.

NEOM functions as an important driver for innovation by concentrating on



tech and renewable energy development which establishes Saudi Arabia as a global industry leader while expanding tourism activity.

Figure 1-4-1 : PIF website

2. Qiddiya: Entertainment and Culture ⁽⁴⁾

The Qiddiya project represents a \$9.8 billion investment that has shaped a \$9.8 billion investment to establish an entertainment and cultural hub through theme parks and sports facilities and cultural centers. The enhanced entertainment sector in the area will support diverse tourism traffic thereby decreasing international visit dependence.

Through its development Qiddiya will establish employment opportunities and strengthen domestic entertainment businesses and it plans to welcome both Saudi nationals and international visitors.



Figure 1-4-2 : PIF website

3. Red Sea Global: Sustainable Tourism⁽⁵⁾

Red Sea Global, with an investment of \$23.6 billion, focuses on luxury eco-tourism along the Red Sea coastline. The development includes sustainable marinas and resorts among its various facilities.

The Saudi Arabian tourism market will establish itself as a premier luxury destination because of this project which has established modern standards in sustainable travel development.

4. Diriyah Gate: Preserving Heritage⁽⁵⁾

The Diriyah Gate project worth \$63.2 billion aims to protect Saudi Arabian cultural heritage while boosting its cultural visibility in the world. Diriyah will host multiple museums alongside cultural venues and top-class hotels located within the historical Diriyah city.

Through Diriyah Gate Saudi Arabia advances its cultural tourism segment while building recognition of its cultural influence worldwide.

5. King Salman Park: Urban Green Spaces⁽⁵⁾

The \$23 billion King Salman Park functions as a project to develop 13 square kilometers of green space in Riyadh for improving sustainability and urban life quality.

6. World Cup Stadiums Project in Saudi Arabia

Saudi Arabia operates an active construction program for advanced stadiums that supports its Vision 2030 sports infrastructure development agenda. The Kingdom works toward constructing high-tech sustainable stadiums that will serve as event venues for major sports competitions such as potential FIFA World Cup tournaments.

Stadiums under construction will contain advanced technology elements which include retractable roofing systems along with energy-efficient cooling mechanisms and environmentally friendly construction features. The development combines environmental sustainability goals with spectator

comfort principles. Saudi Arabia implements this development as part of its economic diversification strategy to build its position as a worldwide sports hub and create stadiums that will host international sporting events in the future. Through this development Saudi Arabia shows its dedication to upgrading its infrastructure while establishing permanent sports heritage across the area.

Over 15 stadiums are under process, either design, Bidding, or execution, with Value over than 7 Billion USD.



Figure 1-4-6 : Ministry of Sports announcement

The recreation area will create a more appealing Riyadh environment by drawing people who want a sustainable lifestyle along with visitors for leisure.

Expected impact for the giga projects in Saudi Arabia will produce major economic along with societal and international influence changes by 2025. The projects will advance economic diversification through their job creation and their support of non-oil industries and their ability to draw foreign investments. Tourism will experience major expansion because NEOM and Qiddiya along with Red Sea Global attract international tourists to their locations. Through its smart city model at NEOM Saudi Arabia will demonstrate its innovation and sustainability capabilities to the world. The cultural project Diriyah Gate will improve Saudi Arabia's cultural reputation while its eco-tourism and green initiatives will establish new environmental benchmarks. Through these developments Saudi Arabia will establish itself as a worldwide leader in tourism and technology as well as culture by 2025 which will support the economic transformation and diversification of Vision 2030. ⁽⁶⁾

Conclusion

The giga projects in Saudi Arabia serve as critical elements for reaching the objectives set in Vision 2030 regarding economic growth, environmental consciousness and global marketplace dominance. These developments will lead to innovation which generates employment opportunities while making Saudi Arabia an international power in tourism and technology and cultural domains.

5. Goals of the study

The main goal of this research examines the essential brand awareness building objectives for Multinational Paints company across Giga Projects Saudi market.

Our main goal is to identify and study the essential elements that influence brand awareness within the Saudi building materials market through evaluation of cultural regulatory and competitive market factors which determine audience recognition patterns for such companies .

The evaluation of present branding strategies used by these companies in Saudi Arabia makes up part of this assessment. The researcher will evaluate cases and conduct expert interviews and analyze market information to assess the effectiveness and barriers of present strategies.

The study presents recommendations that aim to enhance market visibility together with strategic understandings designed to boost brand recognition within Saudi Arabia. These recommendations will target the challenges while utilizing available opportunities to enhance brand observation and increase market penetration.

Strategic Decision-Making needs better market insight and effective strategies: This research delivers practical recommendations and data-based strategies which support decision-making processes for these companies' leadership. The study of Saudi Arabian market conditions enables companies to transform their strategies for local market success and sustainable competitive advantage.

6. Questions of the study:

The specific questions developed for the study guide researcher activities toward specific Questions which enable the study to provide responses to its main questions.

- These companies need to understand the main cultural barriers preventing them from entering the Saudi building materials market while building brand awareness remains a significant challenge.
- The study examines which main regulations need attention during brand awareness planning and how these companies handle them in the Saudi construction market.
- How do Clients, contractors, and other parties in this chain understands and act on quality, reliability, and trustworthiness which can be added by such companies, and would it be possible to influence buying decisions as key factors beating other factors like price, and stock availability?
- Which are the main obstacles companies need to overcome to maintain long-term competitive superiority in this market sector and what core advantages do leading market participants currently hold?
- Giga projects employ specific technological advances which determine the selection process for coating products operating in this sector.
- Such companies employed specific strategies in comparable markets to create brand awareness historically but must adapt their Saudi market approach through necessary changes to be effective in this market.

7. Assumptions

The research on brand awareness development for multinational protective coatings companies operating in Saudi Arabia's giga projects market relies on the following assumptions:

1. The giga projects in Saudi Arabia will pursue their planned expansion according to Vision 2030 through major investment in infrastructure and development. The market expansion creates new opportunities for multinational organizations to develop their presence in this area.
2. A well-designed brand awareness strategy coupled with market-specific advertising will enhance the Saudi market's recognition and brand loyalty towards multinational protective coatings companies.
3. The protective coatings market of Saudi Arabia exists as a competitive field where multinational companies fight for market share together with local and regional competitors. The research explores the methods multinational brands should use to create unique positioning and deliver their essential value propositions.
4. The research depends on continued Saudi government backing for international investments particularly within Vision 2030 relevant sectors including infrastructure and construction. The market entry of multinational protective coatings companies will become easier through these measures.
5. The study relies on the assumption that Saudi Arabia's economic conditions will sustain business expansion through the ongoing large-scale Vision 2030 investments and projects.
6. High-quality protective coatings demand in Saudi Arabia will increase because of expanding construction and infrastructure development throughout real estate and transportation and energy sectors.

7. Multinational companies understand the necessity to adjust their marketing approaches, so they match Saudi market cultural and geographical tastes which requires localization of their brand awareness initiatives.

8. Theoretical Model:

This research uses multiple marketing frameworks to develop a theoretical model which examines how multinational protective coatings businesses should establish brand awareness in Saudi Arabia's giga projects marketplace⁽¹⁶⁾.

AIDA Model ⁽¹⁷⁾ works by getting customer attention followed by interest creation before developing desire and finally driving them to select the brand.

Brand Awareness Pyramid demonstrates the different stages through which awareness develops from being non-existent to becoming the leading brand option.

SWOT Analysis⁽¹⁸⁾ serves as an assessment method to determine both organizational strengths and weaknesses as well as market opportunities and threats in competitive marketplaces.

These models will direct multinational companies toward establishing their brand recognition throughout the expanding Saudi Arabian construction and infrastructure market.

Chapter two: Literature review

1. Introduction to Literature Review

This literature review evaluates current studies and theories which explain brand awareness development especially for multinational organizations engaging overseas especially middle east and Saudi Arabia's developing giga projects market.

Saudi Arabia's implementation of Vision 2030 has triggered explosive infrastructure expansion which opens multiple business opportunities for multinational companies particularly in building materials. The research examines brand awareness tactics and construction industry marketing approaches together with multinational corporate involvement in developing markets like middle east and Saudi market characteristics related to giga projects.

The chapter analyzes brand-building approaches across similar markets used by multinational corporations by examining academic research and industry publications that describe their struggles and opportunities when creating brand recognition in tight competitive sectors.

The review examines Saudi Arabia's market characteristics which include cultural elements as well as economic factors and regulatory structures affecting brand awareness initiatives.

This review investigates approaches that multinational building materials companies should use to construct effective brand presence within Saudi Arabia's developing infrastructure sector.

2. Previous studies:

After reviewing the few studies related to this study, the researcher saw these top studies related to this subject and can be useful in this study.

1. Al-Shaikh, M., & Al-Harbi, N. (2017)⁽⁷⁾. **Brand Awareness in Emerging Markets: A Case Study of Multinational Companies in the Middle East.** *Journal of Marketing Research*, 32, 65-80.

The research investigates brand awareness strategies of multinational companies in their operations within Middle Eastern emerging markets

Summary:

Research investigates the methods multinational companies use to modify their brand awareness approaches for different local markets in the Middle East region. Global strategies require modification when organizations implement them to address specific local market needs because multinational companies need to adapt their branding strategies to accommodate cultural differences and local economic conditions and consumer preferences. Market research combined with local understanding drives successful brands to create customized market strategies in emerging markets.

Key findings include:

- **Consumer Behavior:** The study highlights how consumer behavior in the Middle East is influenced by cultural values, social norms, and economic growth, making it essential for brands to tailor their marketing strategies to local preferences.
- **Brand Positioning:** Successful multinational companies are found to focus on **localized marketing efforts** to enhance brand recall and recognition. This includes leveraging both traditional and digital media channels effectively.
- **Challenges in Emerging Markets:** Companies face challenges such as regulatory differences, market competition, and a need for continuous adaptation to shifting consumer preferences. Establishing trust and credibility is identified as key to long-term brand success in the region.
- **Importance of Social Media:** The research also notes the increasing role of **social media** and **digital marketing** in building brand awareness among the younger population, which is a dominant demographic in the Middle East.

Link to the study

An analysis of this research provides valuable knowledge for protective coatings companies which maintain multinational operations within Saudi Arabia's giga projects industry.

Recommendations

International protective coatings firms need to modify their worldwide marketing plans to fulfill Saudi Arabian consumer requirements.

The company needs to perform detailed market research which focuses on the requirements of construction and infrastructure projects that span large scales.

The market should receive education about product benefits which match local weather conditions such as extreme weather tolerance for coatings.

2. **Al-Saadi, S. (2015).⁽⁸⁾ The Role of Brand Awareness in the Building Materials Sector in the Gulf Cooperation Council (GCC) Countries.** International Journal of Business and Marketing, 11(2), 98-113.

In this 2015 study, Al-Saadi explores the crucial role that brand awareness plays in the building materials sector across the Gulf Cooperation Council (GCC) countries. He investigates how companies in the region are leveraging brand recognition to stand out in a highly competitive market.

Summary:

The research examines how building materials companies in the GCC area including Saudi Arabia benefit from brand awareness for operational success. The research output shows that MNC building materials companies need reputation along with trust and word-of-mouth marketing to build brand recognition. Strategic alliances between multinational companies and local businesses produced better market penetration since such partnerships helped foreign companies understand regulations and establish trust with customers.

- **Importance of Brand Awareness:** Al-Saadi emphasizes that **brand awareness** is not just about recognition—it directly impacts consumer trust and purchasing decisions in the building materials industry. In markets like the GCC, where construction is booming, building strong brand awareness can help companies gain a competitive edge and foster long-term relationships with clients.
- **GCC Market Dynamics:** The research highlights that the **GCC** region, including countries like Saudi Arabia, the UAE, and Qatar, is witnessing rapid urbanization and infrastructure development. This provides both challenges and opportunities for companies in the building materials sector, as they need to establish themselves as reliable, trusted brands to capture a significant share of this growing market.
- **Consumer Behavior:** The study dives into how customers in the GCC view and choose building materials. It turns out that **reputation** and **reliability** are key factors when clients decide which brands to trust, especially for large-scale, high-stakes projects. As a result, companies need to focus on delivering quality and consistency to build a strong brand presence.
- **Brand Strategies:** Al-Saadi also points out that to build brand awareness effectively in this region, companies need to adopt **localization strategies**. This includes understanding the unique cultural and business practices of

each GCC country and tailoring marketing efforts accordingly. Companies that blend global quality with regional relevance tend to see more success.

- **Challenges and Opportunities:** The study doesn't shy away from the challenges—one major issue is **intense competition**, especially from both local players and multinational companies. However, there are significant opportunities for companies that can navigate these challenges, particularly by focusing on **customer service**, **product differentiation**, and **innovative solutions**.

Link to this study

The research results maintain strong relevance for your study due to their emphasis on market success through trust creation and increased visibility. Protective coatings companies operating internationally should establish important relationships with contractors and developers to achieve market success.

Recommendations

The international coatings industry should use local construction company partnerships to develop successful brand recognition programs.

The product success should be demonstrated through large-scale project case studies while promoting word-of-mouth marketing strategies.

The company should concentrate on developing an outstanding reputation through consistent delivery of high-quality and dependable products.

3. Zaki, M. A. (2019)⁽⁹⁾. Building Materials Market in Saudi Arabia: Trends and Opportunities for Foreign Companies. *Saudi Arabian Business Journal*, 14, 103-118.

Summary:

The building materials market in Saudi Arabia receives analysis in this study which demonstrates how foreign companies can benefit from the expanding construction sector of Vision 2030. Vision 2030 of Saudi Arabia provides many business opportunities for foreign construction firms operating primarily in building materials sectors. High-quality material demand grows rapidly so foreign companies need to master both local regulations and market dynamics for business success.

The Saudi Arabian building materials market demonstrates strong expansion due to new and future infrastructure projects that cover residential buildings as well as commercial facilities and public facilities. Foreign companies can capitalize on this expansion by entering the construction material market in Saudi Arabia.

The expansion of the Saudi Arabian construction sector receives substantial support from the Vision 2030 initiative. The government initiative for diversification and urban development and infrastructure development creates substantial demand for high-quality building materials.

The research shows that regional building materials demand keeps growing because customers seek sustainable and cost-efficient solutions combined with green building adoption. The construction sector in Saudi Arabia now emphasizes both the use of prefabricated materials and energy-efficient solutions.

Foreign companies will find success within Saudi Arabia's building materials sector if they provide advanced technological products alongside innovative solutions according to research findings. Foreign companies establish success in the Saudi Arabian market through either local distributor partnerships or by investing directly into the country's infrastructure expansion.

Although Saudi Arabia offers attractive opportunities to foreign companies they need to overcome regulatory complexities and cultural differences and competitive pressures. Foreign companies need to modify their business operations to fit the unique market conditions present in Saudi Arabia since they operate outside their domestic markets.

Zaki's study indicates foreign firms need to adjust their business approaches to Saudi local demands and develop enduring partnerships together with monitoring evolving building material industry patterns including sustainable practices and technological developments in construction.

Link to this study:

The research brings essential data about Saudi Arabia's growing infrastructure sector which presents new possibilities to multinational protective coatings companies. Local regulations along with market trends and government incentives require full awareness to establish brand presence.

Recommendations:

The growing construction demand in Saudi Arabia offers multinational companies an opportunity to succeed by adopting marketing approaches consistent with Vision 2030.

Protective coatings companies need to highlight sustainability and innovation toward Saudi Arabia's Giga projects since these aspects matter more to the market.

Follow government policies and incentives since they could create market advantages.

Chapter three: Research Methodology

1. Introduction :

This research project follows a specific method to study how multinational protective coatings firms can promote their brands successfully in Saudi Arabia's giant construction projects market. This chapter presents our research methods and tools along with the data collection process to identify brand-building factors for multinational protective coatings firms working on Saudi Arabia's Vision 2030 projects.

A **qualitative study design** helps researcher investigate the factors behind brand awareness among multinational protective coatings companies. The study chooses qualitative research to collect valuable industry data and information from Saudi Arabia's giga project experts and people who make decisions about this sector. Our research technique serves well to analyze social market details especially how brands promote themselves through advertising in Saudi Arabia's special environment.

This includes Professionals from Clients side, Designers, and Main contractors.

Researcher uses both descriptive and exploratory research methods as our research design¹⁹. the research will examine all main details about how multinational protective coatings companies are known in Saudi Arabia's market. the research will examine what problems and advantages exist for these international protective coatings companies when they want to make their brands known in Saudi Arabia.

This analysis will gather **semi-structured interview** data from experts within the industry plus project managers and officials from multinational coatings companies. Our interviews will teach us about effective brand-building techniques and show what challenges companies meet when doing business in Saudi Arabia. To enhance the research insight, researcher will obtain relevant market data from official publications and specialized industry reports plus research materials.

To identify interviewees the research will select participants with experience in building materials through a specific selection process that targets people

involved with large-scale infrastructure projects including NEOM, FIFA world cup 2034 stadiums, and Qiddiya. The specific research strategy selects people with the most useful information for our project goals.

2. Research design :

The research design is exploratory in nature which is good for the understanding of the brand awareness in relatively an under-researched market. An exploratory study referred for probing issues that affects brand perceptions, marketing strategies, challenges faced by multi-national companies in the construction sector in Saudi Arabia.⁽¹¹⁾

Key elements of the research design are:

Mixed-Methods Design⁽¹⁰⁾: In order to get a complete understanding of the problem the study will incorporate qualitative and quantitative data collection techniques.

Qualitative Approach: Focus groups and semi-structured interviews with industry specialists, project directors, and procurement officers will provide further qualitative information into branding problems, cultural communications, and relationship building in Saudi construction industry.

Quantitative Approach: A survey will be sent out to a more extensive gathering of stakeholders (e.g., developers, advisors, workers for hire, and so forth) to accumulate measurable information about brand consciousness and how compelling marketing is.

3. Population of the Study ⁽¹³⁾

This research targets professionals within the Saudi Arabian construction sector as well as professionals working in coating applications who perform their duties in the country.

Professional developers who work in Giga Projects participate in the research.

Large-scale construction project material specification falls under the responsibility of both Project Managers and Engineers.

Consultants and Contractors who influence decision-making for construction materials.

Professional personnel who select coatings and materials serve as both Procurement Officers and Supply Chain Managers.

Engineering departments professionals working within the Clients' Companies

The research examines personnel who work on the Giga Projects which include NEOM, Qiddiya, JCD, World Cup Stadiums.

4. Sample Characteristics:

The research will receive its targeted information from a wide demographic of industry professionals which includes both local companies as well as international companies to gain a complete market understanding.

The selection process demands participants who take part in major Giga Projects or contribute to the brand choice for protective coatings on large-scale projects.

Sample Types:

For qualitative interviews: Experts with experience in the field.

The survey for quantitative data collection aims to include various professionals from the construction sector who work on Giga Projects.

5. Sample Size Determination:

- **Qualitative Sample Size:** Approximately **4-5** semi-structured interviews will be conducted with key industry experts and decision-makers (e.g., project managers, consultants, etc.). This sample size is suitable for qualitative analysis and will provide rich insights.
- **Quantitative Sample Size:** targeted sample size of **20-30 respondents** to ensure statistical significance and representativeness of the population.

Sample size determination will be based on factors like the size of the target population, expected response rates, and the level of confidence desired.

6. Data Collection Procedures:

Interviews : Semi-structured interviews serve as the data collection method for selected industry professionals. The research design features interviews that analyse brand decision processes and how brand selection takes place and how Saudi Arabian professionals perceive multinational protective coatings brands.

The interview guideline includes open-ended queries which allow for adaptable questioning to address every significant point (including branding difficulties and cultural elements and regulatory aspects).

Surveys: An online survey distributed through the internet will reach a wide range of industry professionals. A mixture of selected questions and Likert scale items will be included in the survey to evaluate how well people recognize brands and how they perceive both brands and marketing approaches.

7. Boundary of the study (Study Determinants):

This research Identify its' boundaries as follows:

- 1- Geographical Limits: Saudi Arabia
- 2- Activity: the personals to be interviewed must be working in one of Saudi Arabia Giga projects (Neom, DGDA, WC Stadiums, JCDC)
- 3- Time frame : worked in Giga projects from 2018-Present

8. Method of Analysis:

Thematic analysis serves as our method to study the collected **interview** data. Examining all responses will help us locate recurrent branding problems as well as effective strategies used by companies in Saudi Arabia's construction sector.

The **survey** results will be studied with both basic statistics like frequencies and means together with advanced statistical tools including correlation and regression analysis.

Chapter four: Practical Study

Introduction

Multinational protective coatings companies need effective strategies to establish brand recognition when targeting the rapidly growing construction sector of Saudi Arabia.

The analysis includes professional interviews from four industry sources including the Project Manager of an Emirati steel fabricator for NEOM and an engineer for DGDA and one engineer for PIF GIGA projects along with a painter from a contractor. A survey process alongside the interviews was deployed to multiple stakeholders from construction activities such as project managers and consultants as well as contractors. The surveys collected numerical data about brand recognition significance together with the variables which affect protective coatings purchase choices.

The chapter explores brand awareness challenges alongside strategic approaches and key components through the combination of interview qualitative data and survey quantitative results in Saudi Arabian high-profile construction ventures. The research applies practical methods to close theoretical-application gaps and suggests business strategies which lead to market success in this active industry landscape.

1. Data Analysis

- **Data Analysis: Interviews:** All interviews transcripts will be in the appendix.

Four interviews give essential views about the construction field from different industry professionals. Here's what we learned:

The Project Manager at NEOM focuses on performance excellence above all since the project operates within harsh environmental conditions.

The Engineer working on DGDA highlights that coatings need to fulfill both functional requirements and cultural as well as aesthetic needs of the project. Technical ability together with cultural compatibility make up the essential factors.

Engineer (PIF GIGA Project) states that GIGA projects demand absolute performance alongside sustainability and product durability. The brand reputation remains crucial yet the essential factor that matters is how well the product performs against established high standards.

The painter focuses primarily on user-friendly products and extended product longevity. Product performance takes priority over brand recognition while real-world operational success defines the key success factor.

The research provides essential knowledge about practical coating selection criteria for major construction works which demonstrates the superiority of performance-based decisions over brand loyalty.

- **Interview 1: A project manager from an Emirati steel fabricator operates within the NEOM development project.**

Summary:

Protective coatings serve as a fundamental component for the NEOM project according to the Project Manager who speaks in this interview. According to the Project Manager durability stands as the main criterion that determines the selection of coatings within NEOM because of its extreme conditions. Brand recognition is significant yet the performance of the product including its ability to tolerate heat along with humidity and enduring long-term conditions takes precedence. The Project Manager highlights the importance of coatings' appearance since NEOM serves as a prominent representation of Saudi Arabia's Vision 2030.

Analysis:

The Project Manager emphasizes that reliability and technical abilities take precedence above brand recognition when selecting materials for demanding projects such as NEOM. Multinational companies should organize their products to fulfill technical requirements and visual and cultural expectations of ambitious projects. The Saudi market demands protective coatings that excel both technologically and aesthetically in ambitious projects which makes this understanding vital for multinational companies planning Saudi expansion.

Comment:

Brand reputation acts as an insufficient factor to win contracts in Saudi Arabia's Giga projects that multinational coatings companies aim to secure. The technical excellence of their products in extreme conditions combined with their aesthetic values must stand as the main factors for multinational coatings companies to establish their position in Saudi Arabia. The development of local partnerships together with stakeholder relationships enables multinational companies to build trust and show their awareness of local conditions.

- Interview 2 : The engineer responsible for work on the Diriyah Gate Development Authority (DGDA) project

Summary:

The engineer at Diriyah Gate Development Authority (DGDA) handles quality standards as he works to meet local laws while preserving cultural heritage sites. The coatings used for this project need protection features while simultaneously representing Diriyah's cultural history and heritage significance. The delivery of attractive cultural-sensitive products takes precedence over brand recognition in this particular market context.

Analysis:

The DGDA heritage restoration project requires multinational companies to prove their complete mastery of local historical background plus cultural elements and societal principles. The market requires both technological excellence along with cultural compatibility which indicates brand recognition serves as a helpful but not essential factor. Protective coatings brands which demonstrate their compatibility with project vision and their ability to strengthen cultural and aesthetic elements will achieve superior market success.

Comment:

The interview demonstrates that multinational coatings brands need to combine cultural awareness with local product adaptations when expanding into new markets. Multinational companies need to verify that their products satisfy local design preferences and all necessary regulatory specifications. The process of gaining recognition in cultural heritage projects within Saudi Arabia demands local collaboration with local experts who can validate coatings both for technical requirements and for their alignment with Saudi cultural values.

- Interview 3: An engineer at a Public Investment Fund company handles a GIGA project

Summary:

A PIF engineer emphasizes that GIGA projects need superior technical capabilities and Vision 2030 compliance more than corporate reputation. Coatings need to demonstrate extended service life and operational quality combined with environmental contribution to the nationwide targets of Saudi Arabia. The interview highlights the necessity of developing connections with local suppliers and contractors and consultants for the supply chain engagement.

Analysis:

The GIGA projects work under a higher purpose which puts environmental sustainability at its core according to this interview. Multinational protective coatings companies seeking GIGA projects should focus on developing sustainable and innovative solutions that adhere to local requirements and support Saudi Arabia's Vision 2030 long-term vision. Product innovation together with sustainability and technical ability take precedence over brand reputation in this project context.

Comment:

Sustainability stands as the principal vital lesson which multinational coatings firms must learn. Companies need to create products that fulfill demanding performance criteria and support Saudi Arabia's progressive environmental targets to succeed in GIGA projects. Strategies for product development and marketing must emphasize sustainability as their main focus because this appeal will attract both private investors and public stakeholders who participate in big-scale developments.

- Interview 4 :The painter who works at a construction site participated in Interview

Summary:

A painter working on site construction focuses primarily on how protective coatings function in practice. The most essential criteria for him include finding coatings which provide simple application and extended durability while performing well. He does not prioritize brand labels but places greater importance on coatings that have both good usability and extended longevity. His selection of preferred coatings depends on his observation of how different coatings deteriorate over time.

Analysis:

The painter focuses on useful operational qualities instead of recognizing brand names. The usability and enduring quality of these coatings determine performance efficiency and job contentment in construction sites. The practicality and longevity of coatings products needs attention from brands because these factors determine how well products meet the demands of large construction sites where direct personnel contact occurs.

Comment:

Multinational coatings companies need to understand that worker satisfaction from painters depends primarily on the practicability of their products rather than brand recognition. Coating companies must create products which offer simple application methods together with extended durability alongside low maintenance needs. Improving brand perception by resolving product maintenance concerns at ground level will create lasting loyalty between contractors and workers.

General Conclusion and Implications for Brand Awareness in Saudi Arabia's Giga Projects Market

Brand awareness influences Saudi Arabia's Giga project market yet executives place other factors above it as their main decision-making criteria. The decision-making process for Giga projects depends largely on product performance combined with sustainability standards along with technical advantages and cultural sensitivity. Multinational coatings companies need to develop products that meet project requirements for each extreme scenario including harsh weather conditions as well as cultural protection needs and environmentally conscious specifications. The competitive market demands strong local relationships together with cultural understanding and innovative durable and environmentally friendly solutions for multinational coatings companies to achieve success.

Data Analysis and Summary of Survey Results

This survey provides important details regarding what drives coating selection decisions for Saudi Arabian Giga Projects and how well participants understand various brands in the construction and protective coatings sector. We will now analyze the survey results which include essential insights supported by practical interpretations of respondent feedback.

• Questions 1 : Where do you work within the contract chain?

Summary:

Most respondents function as contractors and consultants but clients along with suppliers and designers make up the remaining participant roles.

The survey reached people who work in different sections of the construction and coatings industry because it included multiple roles involved in Giga projects.

Analysis:

The large number of contractor survey respondents follows naturally since contractors exercise primary material selection authority that encompasses coating choices. The responsible requirement for these roles includes product verification for both performance and durability standards.

Consultants represent an important group because they guide specification processes to ensure coatings satisfy project requirements.

The number of clients remains limited but crucial because they are the final authority responsible for approving both coatings and other project materials.

Designers along with suppliers who participated in a minority of responses both bring essential functions to the table by determining appearance choices and making certain that coating materials are accessible.

Comment:

The standard role distribution throughout the contract chain emerges in large projects since clients possess the ultimate decision-making authority over contractors and consultants. The marketing approaches of coatings companies need to focus on distinct groups within the decision-making process by understanding the specific role each professional group plays. The marketing approach should differ for contractors through direct engagement but consultants and clients respond better to industry events.

Where do you work within the contract chain?
22 responses

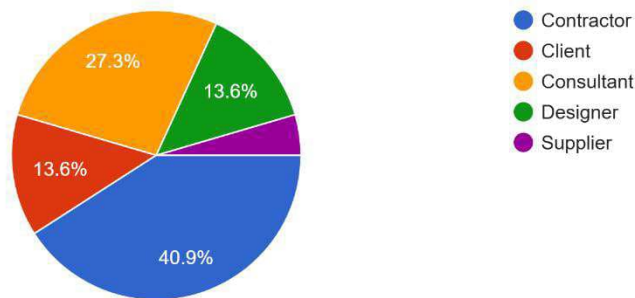


Figure 4.1.1

Conclusion:

Coatings brands need to be aware of the different stakeholders involved in the project decision making process. Specifying products is important and contractors and consultants are important in that, but clients give the final approval. Designers and suppliers help the whole process by making sure that the materials are in line with the project vision and availability.

Direct sales for contractors, events and consultations for consultants and client specific proposals for clients would help to tailor marketing strategies for each role in order to increase brand awareness across the different levels of the contract chain.

• Question 2: What is your role in the construction or coatings industry?

Summary:

Most participants serve as Project Manager, Procurement Officer, Engineer, Designer, and Consultant.

Material Managers Surveyors and Marketing/Sales Managers participate but have fewer responses in this study.

Most participants work in top-level roles that lead decision-making and control projects at scale.

Analysis:

Both Project Managers and Procurement Officers stand out in the answers since these roles lead teams that choose protective coating materials.

Both engineering professionals and consulting experts appear frequently because they ensure technical specifications are met alongside project standards. These professionals need to verify that coating products satisfy specific requirements related to durability, effectiveness and visual appearance.

Designers support visual design integration and aesthetic balance of coatings to create functional yet attractive solutions.

Both Marketing/Sales Managers and Material Managers support coating product success while making sure needed materials stay available.

Comment:

Project Managers and Procurement Officers make up most of the roles because companies rely on them to choose coatings based solely on their price durability and performance capabilities.

Coatings brands should emphasize their product tech details and durability when dealing with Engineering and Consulting professionals.

Multinational brands should focus more on showing how their coatings enhance design vision because this sets them apart from other companies.

What is your role in the construction or coatings industry?

22 responses

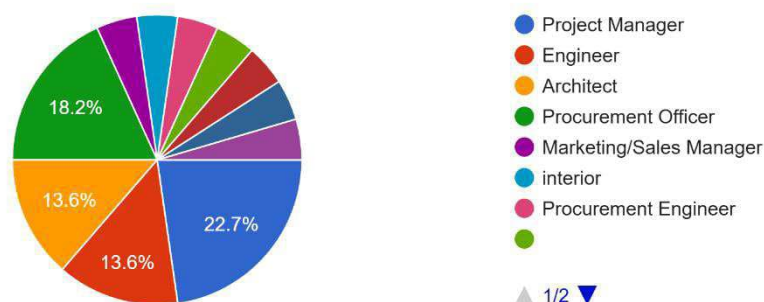


Figure 4.1.2

Conclusion:

Coatings brands should create different marketing messages to reach each type of person who participated in the survey. Project Managers and Procurement Officers want to know how much the product costs and performs while Engineers and Consultants need detailed technical information plus assurance the product meets standards. Designers need evidence that their coatings choices will match the visual requirements of the project.

To grow their business brands need to custom-design their communications for each group in the construction and coatings sector based on their professional roles.

- **Question 3: How many years of experience do you have in the construction or coatings industry?**

Summary:

The survey results contain a mix of respondents who have worked in construction or coatings for 10 years or longer.

Many participants have either worked 7 to 10 years or 4 to 6 years in the construction or coatings industry.

The participant group includes some people who recently joined the industry with 1 to 3 years of experience.

Analysis:

Many survey participants have more than ten years of industry experience showing that the study collected insights from well-versed professionals. These respondents provide important knowledge about project management, product requirements, and supplier interaction.

Many participants in this survey have either worked in coatings between seven to ten years or four to six years which maintains a good balance between experienced professionals and newcomers.

The industry's ability to draw new talent reflects in the presence of respondents with 1-3 years of experience who may consider different coating criteria based on their fresh perspectives.

Comment:

The survey findings show that multinational coatings firms reach multiple levels of industry professionals including established experts and up-and-coming newcomers. Since clients vary widely in their experience levels companies must deliver established products alongside creative solutions that match various customer needs.

Professional experience shows them to rely on established reputation alongside product performance and durability. New industry members focus their buying choices on brands that make using products easier or provide helpful support.

How many years of experience do you have in the construction or coatings industry?

21 responses

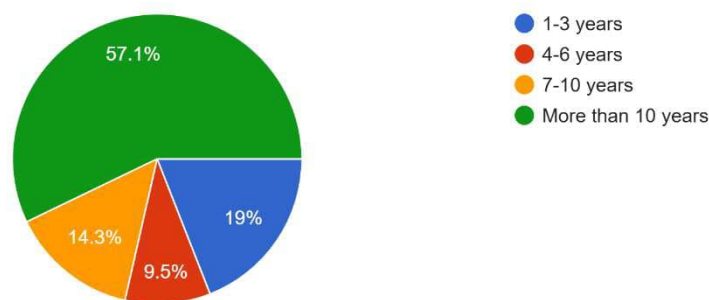


Figure 4.1.3

Conclusion:

With respondents spanning a wide range of experience levels, coatings brands should tailor their messaging to different levels of expertise. Veteran professionals will likely look for reliable, time-tested products and technical support, while younger professionals may be more focused on innovative products, sustainability, and cutting-edge features.

The presence of experienced professionals highlights the importance of trust, reputation, and proven success for coatings companies, while newer professionals might be more open to exploring new brands and emerging technologies in protective coatings.

- **Questions 4: Which Giga Projects have you been involved in?**

Summary:

The survey participants have worked on numerous high-profile Giga projects that encompass NEOM along with Qiddiya and DGDA and World Cup stadiums and additional major ventures, NEOM received the most involvement from survey participants while Qiddiya and DGDA followed closely behind.

Analysis:

NEOM stands out as the dominant project among all Giga initiatives due to its extensive scope from an engineering viewpoint in Saudi Arabia's construction sector.

The cultural and heritage preservation projects Qiddiya and DGDA together with other initiatives receive notable interest from participants.

Comment:

The assortment of projects demonstrates that participants possess diverse Giga project experience thus providing extensive understanding of protective coatings, Knowledge of the projects in which respondents work enables better understanding of their coating needs particularly in challenging environments of NEOM projects.

Conclusion:

By showcasing their ability to handle diverse requirements, multinational coatings companies can position themselves as preferred suppliers in the Saudi market. Companies that can offer solutions for both modern and heritage-focused projects will be in high demand.

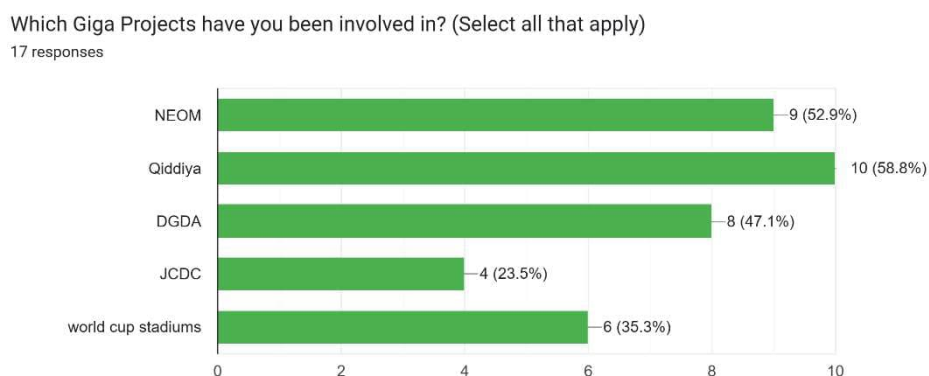


Figure 4.1.4

Question 5: Have you ever specified any of the following brands for use in a Giga Project?

Summary:

Jotun is the most frequently specified brand, followed by AkzoNobel and Hempel, while Sherwin-Williams and PPG were specified less often.

Analysis:

Jotun's dominance in specifications suggests it is the go-to brand for large-scale projects. This is likely due to its proven track record for performance and its ability to meet the high standards required for Giga projects.

AkzoNobel and Hempel also have strong footholds, but Sherwin-Williams and PPG are trailing behind in this area.

Comment:

Jotun's consistency in specifications is indicative of its ability to meet the specific needs of these high-profile projects. However, other brands can still gain more recognition by demonstrating how their products can match or surpass Jotun's performance.

Have you ever specified any of the following brands for use in a Giga Project? (Select all that apply)
22 responses

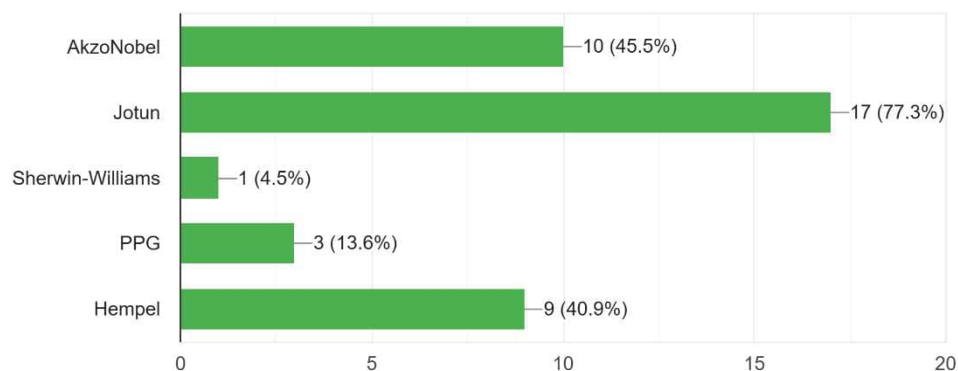


Figure 4.1.5

Conclusion:

To stand out in such a competitive market, coatings companies should continue to focus on quality and technical support. Building trust with local contractors and project managers is key to increasing specification rates. Sherwin-Williams and PPG may need to focus on local partnerships and performance guarantees to improve their specification rates.

- **Question 6: Which factors influence your decision to select a protective coatings brand for a Giga Project?**

Summary:

The primary elements that dictate brand choice for protective coatings include product effectiveness along with durability and access to nearby suppliers and technical assistance. Environmental sustainability together with price/cost considerations receive lower priority compared to other factors.

Analysis:

Product performance together with durability represent essential features in ensuring protective coatings survive extreme Giga project conditions.

The quick procurement of materials becomes possible through local availability thus helping fast construction projects maintain their timeline.

Customer service with technical support functions as a vital element which enables swift handling of any issues.

Comment:

Multinational coatings companies must focus on creating reliable products with excellent long-term performance because these two factors represent the main decision-driving aspects. To keep customer loyalty strong multinational coatings companies must combine an efficient local supply chain system with outstanding customer service operations.

Conclusion:

Multinational coatings companies must maintain their emphasis on product performance along with reliability through local supply chain development and full-scale customer service programs. The competitive Giga project market becomes accessible for businesses through their combination of strong technical expertise with these factors.

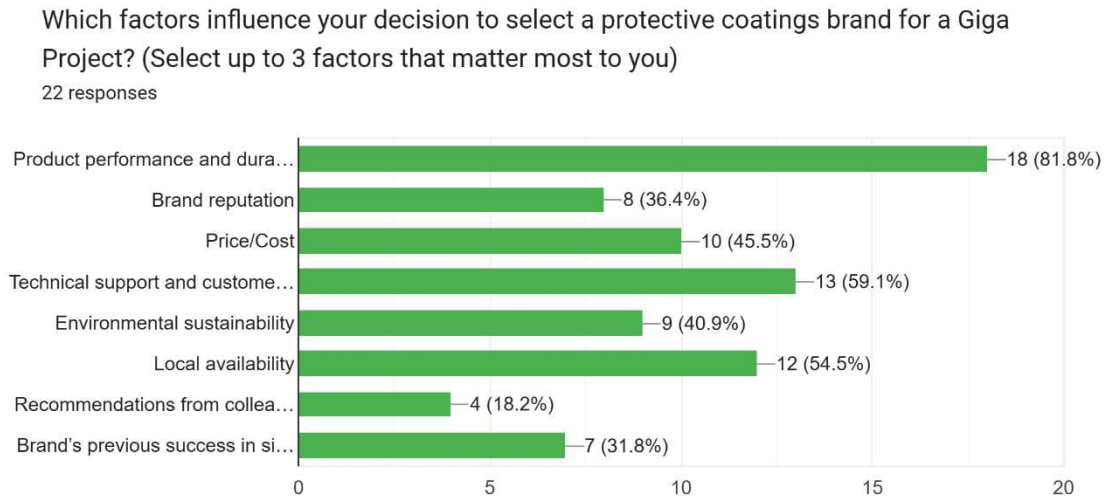


Figure 4.1.6

Question 7: In your opinion, how important is brand recognition in the selection of protective coatings for large-scale projects?

Summary:

Most survey participants ranked brand recognition as either important or very important and distributed their ratings from 3 to 5.

Analysis:

The identification of a brand plays a significant role yet does not determine the final selection. Giga project coating decisions require decision-makers to find solutions that unite reputation status with performance excellence and local business support.

Brand recognition helps decision-making yet the product fails to succeed if it lacks necessary technical capabilities and performance standards.

Comment:

The opinion of a brand influences customer confidence but fails to serve as the final determining condition. Decision-makers require trustworthiness together with high performance capabilities and technical assistance from coatings brands during their brand selection process.

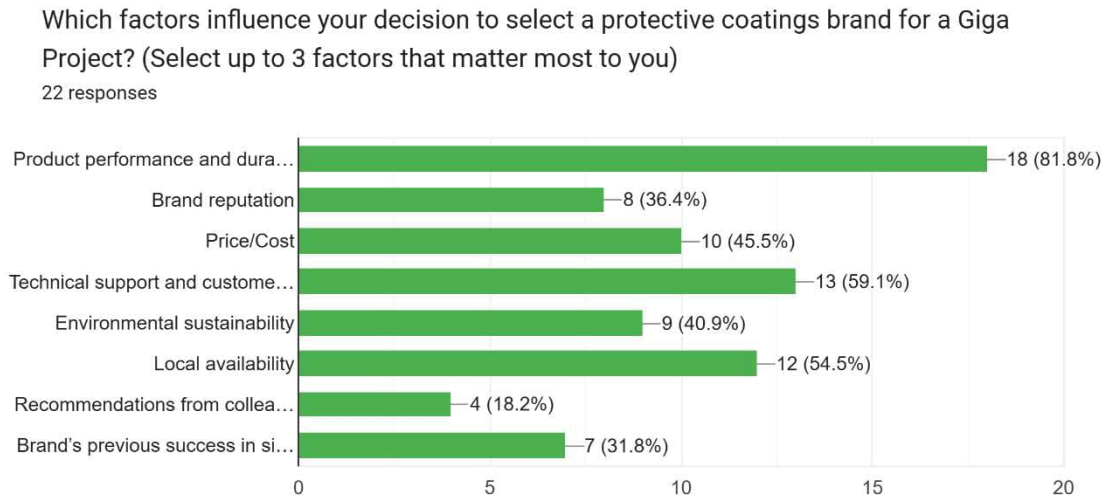


Figure 4.1.7

Conclusion:

The value of brand recognition remains important yet stands as a single element among others. Multinational coatings companies need to work on both gaining market visibility and demonstrating the reliability of their products for performance quality assurance. Businesses that demonstrate strong brands and high-quality products will dominate the Giga project market.

- **Question 8: Which marketing strategies do you consider most effective in increasing your awareness of a protective coatings brand?**

Summary:

The most effective method for increasing brand awareness according to 10 participants (50%) was Direct Sales Visits.

The combination of Industry Sponsorships and Events received endorsements from 6 participants (30%).

The 5 participants who replied (25%) selected Social Media platforms like LinkedIn and Instagram.

The strategy of Online Ads that includes both Google ads and banner ads received support from 3 respondents who made up 15% of the total.

Analysis:

The most effective marketing strategy based on the survey results was Direct Sales Visits which received 50% of total responses. Face-to-face communication and personal relationships maintain strong importance for the protective coatings industry specifically when dealing with Giga projects because they ensure both trust and technical expertise. Decision-makers from complex projects value meeting vendors directly because their projects require specialized client requirements.

The respondents indicated that Industry Sponsorships and Events served as a main factor for building brand awareness among 30% of participants. The significance of networking together with thought leadership manifests in the present industry context. The combination of events and sponsorships enables companies to display their products to professionals while building meaningful connections that lead to vital choices regarding NEOM and Qiddiya development.

Social Media stands as an effective method for reaching customers according to 25% of survey participants. Social media platforms continue to gain importance in business-related activities through professional networking opportunities and knowledge exchange services and brand visibility functions. The professional network LinkedIn provides businesses with a strong capability to identify industry-specific professionals thus enabling coatings companies to connect with key decision-makers and project managers.

The survey results showed that Online Ads had the lowest rate of endorsement at 15% possibly because conventional online promotional strategies such as banner or Google Ads are less impactful in this sector. The construction industry's decision-makers tend to respond better to personal contacts and industry events and direct interactions instead of viewing online advertisements.

Comment:

The fact that Direct Sales Visits are the most highly rated strategy suggests that for multinational coatings companies looking to penetrate the Saudi Arabian market, investing in a salesforce that can actively engage with contractors, consultants, and project managers on-site is key to driving success.

Industry Sponsorships and Events provide a great platform to demonstrate thought leadership and technical competence. Coatings brands should ensure they participate in major construction and engineering events in the region to improve their visibility and credibility.

While social media is still not as highly rated as direct interactions or industry events, it remains an important part of the marketing mix. Coatings brands should focus on creating content that showcases their involvement in high-profile projects, emphasizes product performance, and demonstrates sustainability initiatives, all of which are important for the local market.

Online Ads appear to be less impactful, which could suggest that traditional digital advertising may not be as effective in reaching high-level decision-makers in this sector. Instead, focusing on targeted email campaigns, webinars, or content marketing could be more impactful than broad online ad strategies.

Which marketing strategies do you consider most effective in increasing your awareness of a protective coatings brand?

22 responses

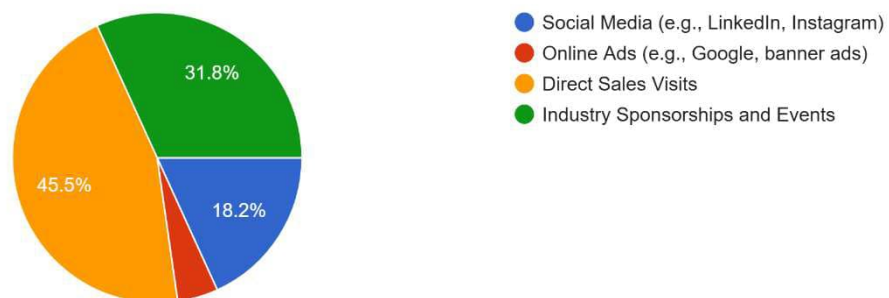


Figure 4.1.2

Conclusion:

The survey results identified Direct Sales Visits as the preferred marketing approach because they have proven to be the most successful method according to 50% of respondents. Multinational coatings companies need to allocate funds toward building strong local sales teams which can get to key decision-makers by direct contact.

The combination of industry sponsorships and events stands as a top marketing strategy because 30% of survey participants selected it as effective for boosting brand trust and networking opportunities.

A significant portion of 25% of respondents identify Social Media (including LinkedIn) as an emerging platform which multinational brands should focus on building online presence through industry-specific valuable content.

Online Ads should maintain a secondary position in the marketing plan based on the limited 15% respondent interest. The industry would benefit more from personalized marketing combined with direct engagement approaches than from other strategies.

General Conclusion

Research from the survey serves as a basis to reveal essential information about how Saudi Arabia's Giga projects market approaches protective coatings brand selection. Here are the main conclusions:

The survey results show that Saudi respondents exhibit deep knowledge about important multinational coatings brands that include Jotun, AkzoNobel, and Hempel because these brands lead the market sector. Brand awareness by itself does not function as the final determinant. Decision-making primarily relies on product performance and durability as well as local availability above all other factors.

The study participants who work across different contract chain roles possess more than a decade of experience either in construction or coatings industries. The survey results indicate that participants possess exceptional expertise because those responsible for Giga project decisions are highly knowledgeable professionals who fully grasp protective coating requirements.

The marketing strategies that prove most effective in raising brand awareness include Direct Sales Visits through 50% of the strategy and Industry Sponsorships and Events representing 30%. The selected marketing approaches prove popular among industrial experts because they reflect the value of creating business connections through direct contact. The increased significance of Social Media marketing among respondents to 25%

demonstrates that protective coatings brands need to combine traditional with digital marketing approaches to reach their target markets.

The main factors which influence coating selection decisions include product performance followed by durability and environmental sustainability. These traits match the harsh regional environmental factors while emphasizing long-term project sustainability as outlined in Vision 2030. The core choice elements for product selection are brand reputation together with technical support yet these aspects follow product qualities in importance.

Brand recognition impacts the selection process, but it does not stand as the determining factor. Project specifications along with reliability features and performance under demanding conditions determine the selection process for large-scale projects. Multinational coatings companies must demonstrate their capabilities by implementing successful projects in addition to building strong partnerships instead of depending solely on their brand reputation.

2. Comparison of Survey and Interview Results with Conclusions and Previous Studies

The survey results and interview responses become clearer with context from existing research findings. The comparison reveals alignment between patterns and their distinct points that affect multinational protective coating firms operating in Saudi Arabia's expanding Giga project sector.

Survey and Interview Findings

The survey together with interview data revealed specific patterns:

Multiple international paint companies such as Jotun and AkzoNobel together with Hempel enjoy established market recognition. Executives make their final choices based on performance characteristics rather than brand presence since durability and environmental friendliness matter most. The product qualities which extend product life and provide dependable performance take precedence over brand reputation in decision-making processes. Direct contact marketing through sales visits together with industry funding programs and social media content prove to be the most successful marketing approaches for spreading awareness.

More than sixty percent of our interview subjects maintain over ten years of experience between coatings and construction industries. The market's decision-makers demonstrate substantial experience which enables them to evaluate both performance and value of products. Multiple Giga projects such as NEOM and Qiddiya and DGDA engage most of the respondents who demonstrate the significant scope and aggressive nature of these projects.

Product performance together with durability along with local availability and environmental sustainability represent the key decision elements for coating selection. Product capabilities together with technical specifications matter most in selection decisions whereas brand recognition plays only a minor role. Excellence in marketing practice emerges from building connections between companies and their target decision-makers through one-on-one relationships.

Comparison with Previous Studies

This research needs evaluation against findings obtained from three significant academic studies.

- **Al-Shaikh, M., & Al-Harbi, N. (2017)** - Brand Awareness in Emerging Markets: A Case Study of Multinational Companies in the Middle East.

The research demonstrated that brand recognition matters in emerging economies while success requires constant adjustments to fulfill individual market needs. The GCC values established corporations but requires multinational businesses to develop products suitable for local market needs.

The importance of brand recognition matches our study results equally as it does with the study of Al-Shaikh and Al-Harbi although recognizable brands alone do not guarantee success. Performance measures along with local adaptation proved to be critical elements according to our research interview responses. The respondents stressed visiting customers directly and establishing personal connections which substantiates Al-Shaikh and Al-Harbi's argument about trust and adaptation importance.

Despite initial entry possibilities through brand recognition companies should focus on becoming successful in Saudi markets by developing trust relationships and delivering high-quality products that satisfy local needs.

- **Al-Saadi, S. (2015)** - The Role of Brand Awareness in the Building Materials Sector in the Gulf Cooperation Council (GCC) Countries.

Brand awareness stands vital within the building materials sector according to Al-Saadi but technical specifications together with regulatory compliance become crucial in large construction projects.

Our survey and interview results demonstrate the same relationship as this research paper. Throughout the research participants emphasized product quality together with longevity and adherence to local building standards more than brand recognition. Brand reputation received moderate recognition from

participants although it could not override the necessity for trustworthy products that fulfill strict technical requirements.

The study results together with Al-Saadi's research show that product quality coupled with regulatory compliance emerge as the essential considerations for customers. Although brand awareness makes a positive impact it does not determine which protective coatings receive selection for Giga projects.

- **Zaki, M. A. (2019)** - Building Materials Market in Saudi Arabia: Trends and Opportunities for Foreign Companies.

According to Zaki Saudi Arabia represents substantial business possibilities for foreign businesses during Vision 2030 development. The companies must make adjustments to serve Saudi Arabia's market requirements while .delivering competitive pricing and reliable results in sustainable materials

Our research confirms what decision-makers say about making sustainable products at favorable prices while delivering top performance. Our research subjects regarded nearby supply and eco-friendly practices as their most important selection criteria for coatings. Organizations need to visit clients .and build ties with suppliers and contractors to boost brand recognition

International companies must provide products that meet Saudi market needs while supporting Vision 2030 objectives to succeed in this market. Organizations that emphasize reliable sustainability practices through local .partnerships win Giga project contracts

General Conclusion

Research from multiple studies confirms that brand recognition is important but Saudi Giga project managers base their purchasing decisions on other factors. The main factors for success depend on how well products perform with local customers while meeting technical requirements and supporting environmental sustainability. Multi-national companies will succeed if they produce excellent products alongside local partnerships and personal sales and .relationship development

The research findings of Al-Shaikh et al. (2017), Al-Saadi (2015), and Zaki (2019) verify these results. First impressions are important for trust building but real success depends on how well a coating performs in extreme projects .plus its ability to endure local conditions

Multinational coating firms need to focus on these main areas to succeed in .Saudi Arabia's construction market

They need to deliver products that fulfill Saudi market requirements for .durability performance and sustainability as well as meet local regulations

Companies should create relationships with stakeholders by interacting with .them in person

Using industry conferences and sponsorship activities to make customers .notice our brand

When multinational companies set up these conditions they can successfully enter Saudi Arabia's fast-growing construction sector.

3. Recommendations of the study.

The research shows these protective coating firms should follow our suggestions to build market success in Saudi Arabia Giga projects.

A company should promote its product features more than its name to succeed

- Our research showed that decision-makers rank product performance above all else especially when the product must handle severe circumstances. The test of a product's success lies in its ability to handle Saudi Arabia's extreme conditions and stay durable.
- Organizations should promote the technical benefits their products offer. Show customers complete research findings and practical product examples that show how the coatings handle difficult settings. Brands should show their value by sharing performance results rather than simply promoting their name.

Understand the Technical Requirements of Your Market Area

- Businesses with locally available and sustainable solutions that follow regional standards succeed in the Saudi market. Leaders who make buying decisions prefer products that meet international standards and follow Saudi local rules while supporting Vision 2030 sustainability targets.
- Multinational companies should study Saudi market requirements and design products to match them. Companies will build consumer trust when they partner with local organizations and participate in community events. Companies should take steps to help Saudi Arabia achieve its environmental goals through their business activities.

Engage Directly with Key Decision-Makers

- The surveys showed direct sales visits and industry events to be the best marketing approach. Both personal connections and direct interactions produce strong results especially in the construction and coating fields.

- Protective coatings brands should schedule face-to-face meetings with project managers, consultants, and contractors to boost their business results. Companies should maintain close contact through scheduled site tours and product showings plus taking part in industry activities to reach potential customers. Creating strong relationships with your most important supporters enhances how trusted your brand is perceived.

Leverage Industry-Specific Marketing Strategies

- People reported that collaboration between industries and organizational events helps spread knowledge among professionals. Through events companies can connect with the right people in their specialist area and display their products at work.
- Protective coatings companies should take part in both major construction events and trade shows for their industry by sponsoring these events. Companies that show active participation in these events will promote their brand while showing their dedication to the construction sector.

Embrace Digital Marketing

- Our research showed direct sales visits stay the best promotional path but companies also use social media and online ads besides their efforts.
- Multinational brands should focus on their digital marketing activities. Using social media platforms plus online ads can help us reach younger purchasing decisions while improving brand exposure across all platforms. Developing valuable digital content helps companies make a strong impact in the online marketplace.

Provide Customer Service Support Before and After Purchases

- Several survey participants stated that superior technical help and customer support matters greatly. A brand that offers top-tier post-purchase support and speedy technical help will make itself known to customers.
- To keep clients engaged businesses need to provide complete support services. Brands should maintain round-the-clock support while having

experts available to help customers with product issues both online and onsite.

Build Trust Through Local Partnerships

The coatings industry needs dependable businesses to deliver excellent performance especially on major projects at NEOM, Qiddiya, and DGDA. Decision-makers depend on suppliers to deliver dependable results that meet their requirements.

Multinational companies should develop lasting partnerships with local building partners to maximize success. Close connections between companies lead to better business insights about regional building practices. Working as a trusted partner will improve your brand image and open new business possibilities.

In general, Companies that succeed in Saudi Arabia's Giga projects market need to offer technology-based solutions that work well with local needs. Stronger product quality needs to replace brand reputation as a top priority for companies in this market. Multinational protective coating companies can boost their market position by following Saudi Arabia's national development goals and using modern marketing methods plus direct relationship building.

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Appendixes(الملاحق)

Abstract

The research explores marketing methods which multinational protective coatings organizations can use to increase their brand recognition in Saudi Arabia's fast-growing giga infrastructure market. Large-scale infrastructure developments that Saudi Arabia has initiated under Vision 2030 particularly NEOM and the Red Sea Project along with Qiddiya have created an escalating need for high-quality protective coatings throughout the construction sector and industry. The analysis explores Saudi Arabia's brand awareness trends by revealing crucial market obstacles alongside possibilities that impact multinational companies while trying to position their brands in Saudi Arabia's competitive market environment. Strategic marketing measures receive analysis through market research and expert interviews to identify brand perception factors and enhance visibility levels and reputation status. The research intends to supply crucial findings and practical recommendations that support international companies in building robust brand visibility and lasting relationships in Saudi Arabia's giga projects sector.

الملخص :

تهدف هذه الدراسة إلى استكشاف كيفية بناء الوعي بالعلامات التجارية بشكل فعال لشركات الطلاء متعددة الجنسيات في قطاع البناء السعودي المتنامي، خاصة في إطار مشاريع رؤية 2030. يستخدم البحث منهجية مدمجة تشمل كلاً من الأساليب النوعية (المقابلات مع خبراء الصناعة ومديري المشاريع وضباط المشتريات) والأساليب الكمية (استطلاعات تستهدف المهنيين من مختلف قطاعات صناعة البناء). يركز البحث على المهنيين المشاركين في المشاريع الكبيرة مثل نيوم، القدية، وملاعب كأس العالم 2034. تكشف النتائج أن أداء المنتج، المتانة، والدعم الفني هي العوامل الرئيسية التي تؤثر في اختيار علامات الطلاء الواقية. كما تبين أن استراتيجيات التسويق مثل الزيارات المباشرة من قبل المبيعات ورعاية الفعاليات الصناعية كانت الأكثر فعالية في زيادة الوعي بالعلامة التجارية. تسلط الدراسة الضوء على التحديات التي تواجهها الشركات متعددة الجنسيات عند دخول السوق السعودي، بما في ذلك المنافسة، الحواجز الثقافية، وضرورة تبني استراتيجيات تسويق محلية. يسهم هذا البحث في تقديم رؤى قيمة حول ديناميكيات بناء العلامات التجارية في سياق صناعة البناء السعودية المزدهرة ويوفر توصيات عملية لشركات الطلاء متعددة الجنسيات التي تسعى لتوسيع وجودها في هذا السوق.

Interview Transcripts

Interview 1: The Project Manager at an Emirati steel fabricator who works on the NEOM Project participated in the interview.

I am grateful for your availability in this interview. You can begin with your involvement in the NEOM project work. What part do protective coatings serve in your NEOM project?

Project Manager:

"Of course, it's my pleasure. The NEOM project depends on protective coatings to maintain success. Protective coatings need to demonstrate exceptional durability because NEOM experiences intense heat combined with high humidity. People select coatings by assessing their performance against environmental conditions. Although product brand names provide peace of mind consumers need to understand that product longevity remains the most crucial factor.

Brand awareness plays only a minor role when you select protective coatings according to the Interviewer.

Project Manager:

Brand awareness plays a role but it fails to determine our final selection. We will not choose a brand just because it has good reputation if their product fails to withstand harsh conditions. The reliability of products in extreme conditions and real-world situations remains our primary trust factor especially during our current challenging environment.

A professional engineer who works on the DGDA project participated in Interview 2.

Interviewer: Thanks for your time today. Brand awareness represents a vital aspect when choosing protective coatings for the DGDA project.

Engineer:

Our team takes brand awareness into account yet other factors remain more important to us. Technical requirements exist for coatings yet they should also integrate with the cultural and historical elements of each project. Our priority is to find protective coatings that fulfill both functional requirements for durability and longevity and maintain respect for the historical value of the project.

The interviewer asked what measures coatings brands need to take for market distinction.

Engineer:

Brands which successfully grasp the local environment gain competitive benefits. Successful sales require more than product marketing because companies need to grasp the complete meaning of each project. A brand stands apart from the competition by providing reliable products alongside services that combine well with both project aesthetics and cultural significance.

A PIF Company engineer working on GIGA projects shares their insights during Interview 3

Thank you for giving me time for this interview. The selection process of protective coatings for GIGA projects heavily depends on how well-known the brand name is.

Engineer:

"Thanks for having me. A GIGA project requires performance excellence above all else although brand recognition does play some role. The coatings must fulfill stringent criteria because sustainability requirements are essential along with extended durability needs. The ability of a coating to perform effectively under Saudi environmental conditions stands as the most important consideration.

The interviewer asks how multinational brands establish their position in the highly competitive market.

Engineer:

Multinational brands need to understand the specific requirements of their target local markets if they want to achieve market leadership. The delivery of products needs to provide technical superiority while meeting the fundamental objectives of Vision 2030. Environmental protection together with sustainability stand as key priorities in this market thus brands focusing on these areas will achieve greater success.

A painter who works at construction sites was interviewed for this assessment

I appreciate your willingness to speak with me today. When selecting protective coatings for your jobs which factor is the most critical for your work?

Painter:

"Sure! The brand name holds little importance to me when it comes to my purchasing decisions. User experience takes priority for me when selecting a coating product. I require a coating which dries fast while being simple to work with and maintains its quality. A protective coating is useless to me when it fails to remain attached or starts peeling off within several months of application.

When working do you see any difference between different brand names?

Painter:

"Yeah, for sure. The performance of particular brands exceeds that of all other options. I focus on coatings which both apply easily and maintain their durability because those are the ones I prefer. The name of the product does not matter as much as its performance in real-world conditions during work tasks. Stand the test of time together with effective job completion makes me choose to use it once more.

Survey responses

Survey on Brand Awareness in Saudi Arabia's Giga Projects Market for Protective Coatings Companies

23 responses

[Publish analytics](#)

Name (optional)

13 responses

kamal

Ehab

Ahmed mohamed ali hassan

aida

خالد جمال محمد محمد

Mohammed Asa'd

Mohamed Gamil Farid

Ahmed Hassan Negm

Khaled almahameed

Eslam

Joao Faria

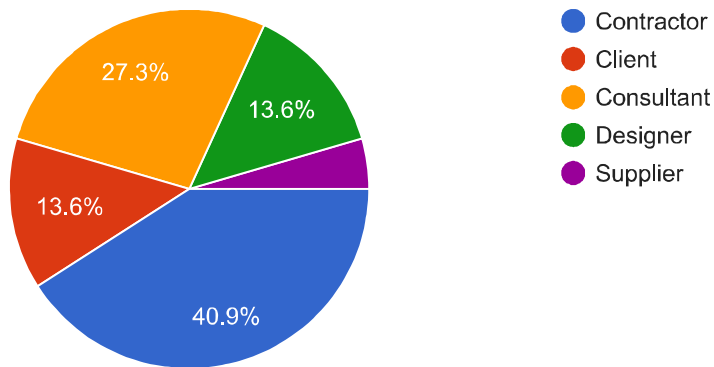
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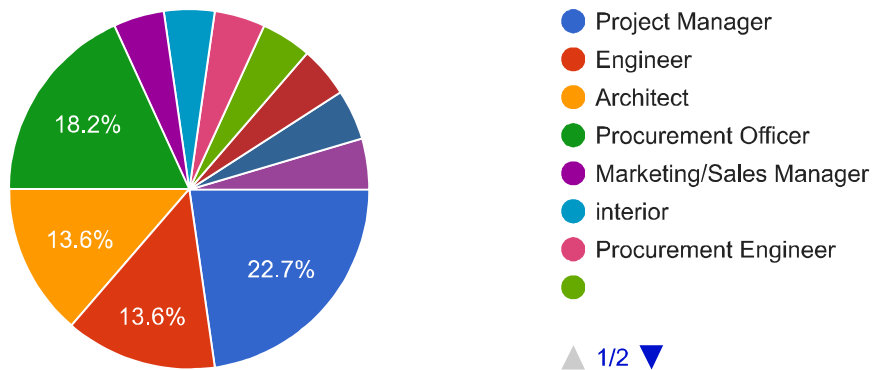
Where do you work within the contract chain?

22 responses



What is your role in the construction or coatings industry?

22 responses

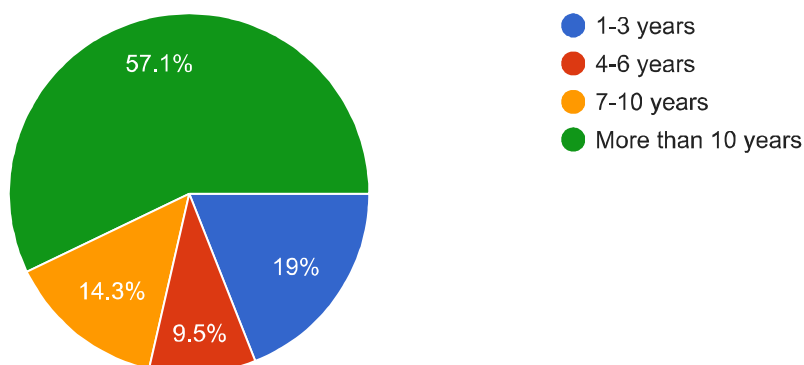


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How many years of experience do you have in the construction or coatings industry?

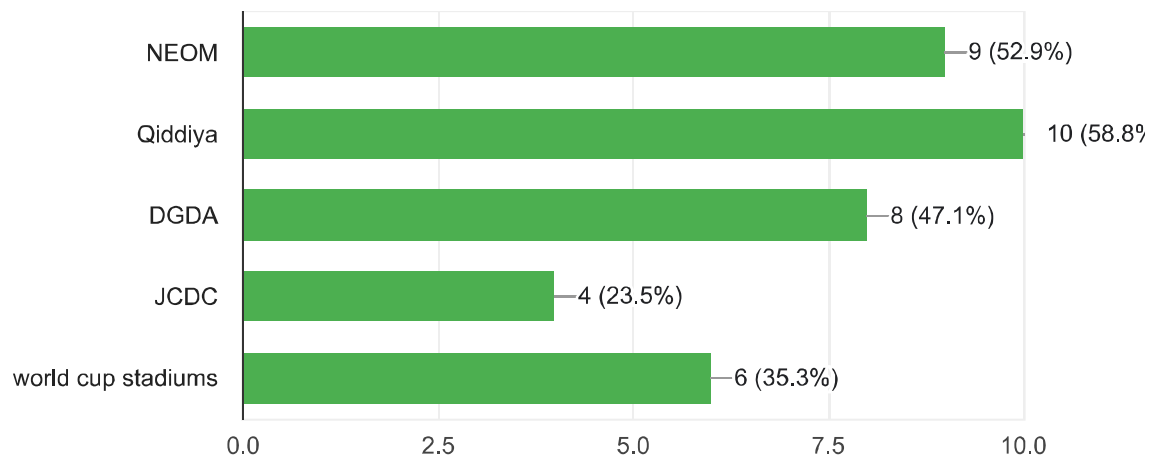
21 responses





Which Giga Projects have you been involved in? (Select all that apply)

17 responses



How familiar are you with the following multinational protective coatings companies?



(Please rate your level of awareness using the scale: 1 = Not aware, 5 = Very aware)

A. AkzoNobel

B. Hempel

C. Jotun

21 responses

Average rating (4.14)

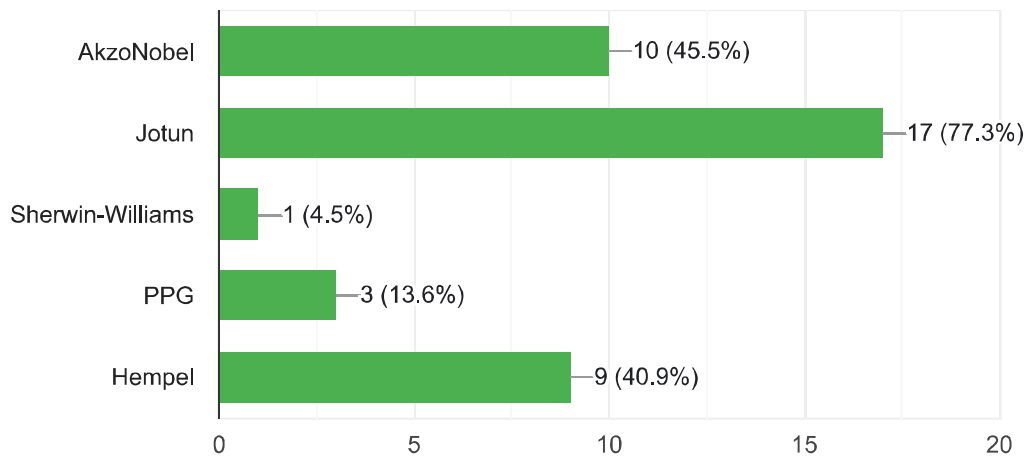


Have you ever specified any of the following brands for use in a Giga Project?



(Select all that apply)

22 responses

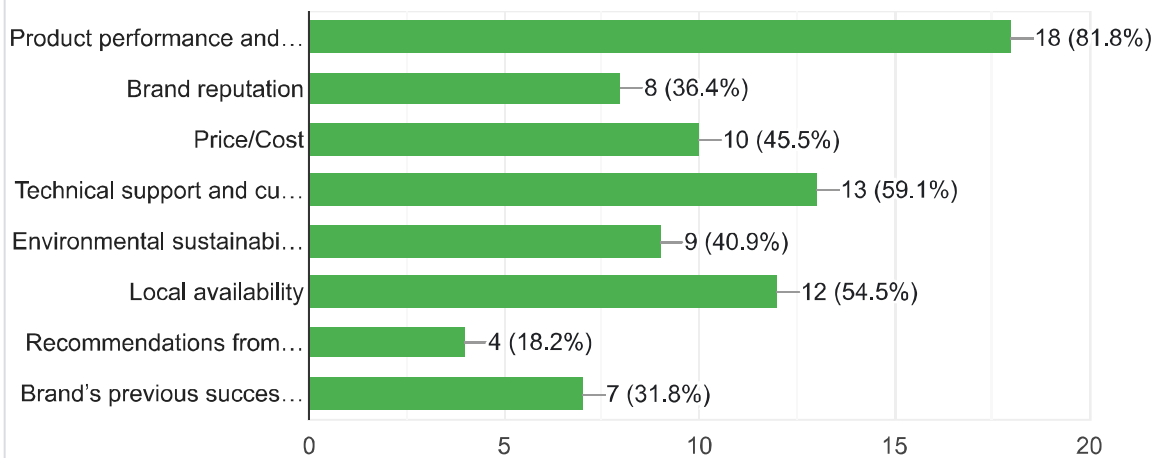


Which factors influence your decision to select a protective coatings brand for a Giga Project?



(Select up to 3 factors that matter most to you)

22 responses



In your opinion, how important is brand recognition in the selection of protective coatings for large-scale projects?



(Please rate your level of awareness for each company using the scale: 1 = not important , 5 = Very important)

22 responses

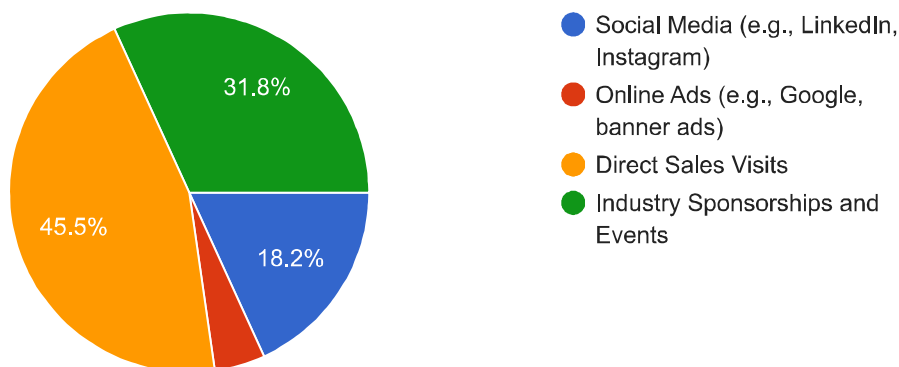
Average rating (3.77)



Which marketing strategies do you consider most effective in increasing your awareness of a protective coatings brand?



22 responses



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