TOURISM IN SAUDI ARABIA AND ITS FUTURE DEVELOPMENT

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ABSTRACT

The Middle East is relatively undeveloped as a tourist region, but future growth is anticipated and Saudi Arabia provides an interesting case study of a country which has recently moved to begin to exploit its untapped potential as a destination. After a brief review of tourism in the Middle East and Saudi Arabia in order to set the scene, this paper reports on the results of an independent effort to forecast aspects of the future of the Saudi Arabian tourism industry based on the deliberations of two independent Delphi panels. The methodology is explained and factors identified as likely to have an impact on tourism in Saudi Arabia are assessed. The implications of these changing circumstances for the planning and marketing of Saudi Arabian tourism are discussed in a final section. Opportunities ahead are highlighted, but the constraints to be overcome are also recognized.

AN OVERVIEW OF TOURISM IN THE MIDDLE EAST AND SAUDI ARABIA

International tourism has become a major industry worldwide and travel and tourism activities generated US$3.6 trillion in 2000. The rate of expansion has been impressive and international arrivals increased annually by an average of 4.3% between 1990 and 2000 (WTO, 2003). Developing nations have sought to take advantage of this strong upward trend, prompted by an appreciation of tourism's positive economic consequences which include income and employment creation, foreign exchange earnings and inward investment. Tourism is vigorously pursued as a catalyst to general growth and means of diversification, despite its disadvantages as a vehicle for economic development (Harrison, 2001). It is now responsible for 19% of the developing world's exports and more than 40% of its gross domestic product. According to Mastny (2002), as many as 65% of the 200 million jobs created by tourism every year are to be found in less developed countries.

Tourists are unevenly distributed around the globe, however, and Europe and America continue to dominate the industry as both generators and destinations. The Middle East recorded 24.1 million arrivals in 2002, only 3.4% of the world's total, although this compares with nine million in 1990 and there was an average annual growth rate of 9.7% throughout the 1990s (WTO, 2003). Sharpley (2002: 221) terms it 'one of the least developed tourism regions in the world' where leisure travel is rare and often seen as 'culturally undesirable and economically unnecessary'. For many Middle Eastern societies, Western style tourism is considered to be fundamentally incompatible with the Islamic religion and way of life (Henderson, 2003).

Other barriers in operation are the absence of infrastructure, harsh climate, visa restrictions and a lack of commercial interest amongst tour operators and travel agents of major generating markets. Regional instability and the heightened threat of terrorism worldwide is another critical issue. Nevertheless, there is a rich endowment of tourism resources and the Middle East offers a host of natural attractions such as deserts, mountains, green valleys and the Red Sea with its beaches and world class diving.

There is also a diversity of archaeological, cultural and heritage sites like spectacular tombs and dwellings carved in sandstone. Accessibility is improving and the WTO forecasts that inbound tourists will rise from 12.4 million in 1995 to 35.9 million in 2010, reaching 68.5 million in 2020 when the Middle East's market share will be 4.4% (WTO, 2000).

Saudi Arabia originally devoted little attention to conventional international leisure tourism for a combination of social, political and economic reasons. There were few financial incentives to do so given its wealth accruing from the discovery and exploitation of oil reserves and the fourfold increase in oil prices in the 1970s. The central role of religious tourism must be stressed, however, with over a million traveling annually for the Hajj (Aziz, 2001) which requires a massive organizational effort by the authorities (Travel and Tourism Intelligence, 1997). The Hajj is a pilgrimage to Mecca which all Muslims are expected to make, if their circumstances permit, at least once in a lifetime. Umrah also involves a visit to the holy cities, but is not restricted to a specific date and may be undertaken on numerous occasions. Those on the Hajj and Umrah together accounted for 3.6 million of the 6.3 million tourists in 2000 and almost half of tourism expenditure. In comparison, business and conference travel constituted 17% of spending while the proportions for VFR and vacation or leisure tourists were 18% and 2% respectively (Mintel, 2002).

Although support for the tourism industry has been limited, Saudi Arabia was a leading Middle East destination by the beginning of the new millennium when it was drawing 27.1% of regional tourists and 29% of receipts (WTO, 2002). Domestic tourists were also a significant sector with about 14.5 million participants annually (Mintel, 2002). Tourism is now Saudi Arabia's third largest industry after energy and manufacturing, and has recently emerged as the second most important in terms of foreign exchange earnings and job creation. In 2001 tourism contributed US$9.6 billion or 5.6% of GDP and employed 489,000 people. By 2020, revenue from the tourism industry could exceed SR86 billion (US$22.93 billion) (Khan, 2003) and it is anticipated that it will provide 1.5 million additional jobs for Saudis (The Economic Intelligence Unit, 2002). There will be spin-off benefits in the wider economy and tourism could boost revenue in

the communication and housing sectors by between 20% and 25% (ITP, 2003)

Such figures and projections have led to a shift in formal attitudes to tourism at a time when oil revenues are no longer as lucrative as they once were, leading to the exploration of alternatives. There is also concern about unemployment levels amongst the rapidly expanding and young population. At present, only 10.5% of the jobs in Mecca and Medina are taken up by Saudi nationals and the Secretary General of the Supreme Commission for Tourism (SCT) would like to see this increased to 70% or more (Kirby, 2003). A relatively new phenomenon is that of Saudization which entails reducing the number of expatriate workers and replacing them with Saudi nationals. Senior government officials recently ordered the establishment of a committee to implement such a move across 21 job categories in several stages over the next three years, at the end of which the workforces should consist entirely of Saudis.

Greater official interest has thus been expressed in tourism in recent years with the formation of specific policies and an administrative framework. There had been no formal agency devoted to tourism prior to 1999 when the SCT was established to promote the sector. Another national body, known as the High Tourism Authority (HTA), was set up in early 2002 to further encourage tourism and is chaired by Prince Sultan, Second Deputy Prime Minister and Minister of Defense and Aviation. It is tasked with developing the tourism industry, implementing the recommendations of earlier studies and preserving key archaeological sites and monuments. Seminars and discussion forums on tourism and its future prospects have also been organized, additional evidence of its higher priority.

A long term tourism master plan was prepared by the SCT and is now being implemented, while provincial plans are about to be drawn up. The intention is to attract 8.1 million arrivals in 2010 and 10.9 million by 2020, 3 million of whom will come from outside Arab areas and the countries of the GCC (Gulf Cooperation Council whose members are Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates). The principal target markets will be Saudi residents and expatriates living in the kingdom, followed by Muslims worldwide and then niches of those interested in

culture and heritage, ecotourism and pursuits such as diving and trekking. Possibilities of enhancing religious tourism have been acknowledged with initiatives such as 'Umrah Plus' which aims to boost the movement of pilgrims outside the main centers of Mecca and Medina, exploiting a relaxation in visa regulations (AME Info, 2002). There are also opportunities regarding extended short break travel by GCC nationals who do not require visas.

Selling to non-Muslims internationally is more challenging due to matters of cultural sensitivity and security, fears about the latter intensified by the terrorist bombings in Riyadh in 2003 and general regional instability. There are also problems related to mutual suspicions between the Islamic and Western worlds and political uncertainties which are likely to deter many visitors. Although visa restrictions have been eased to some extent, the rules are still inconvenient for foreign tourists who wish to visit certain more remote locations. Nevertheless, and assuming the presence of a degree of political stability, long haul tourists might be attracted by the county's unique culture and landscape and the national flag carrier has already had some success in transporting groups from Europe, America and Japan.

A Mintel report (Mintel, 2002: 3) describes Saudi Arabia as possessing much unrealised potential and 'outstanding cultural, heritage and natural sites'. It cites the cities of Riyadh, Jeddah and Mecca as examples. Madain Salah is said to surpass the huge rock tombs of Petra and Al-Jouf is home to antiquities linked to the origins of the Nabatean and Assyrian cultures. There are many parks and the Asir National Park covers over a million acres in the Asir region which offers comparatively green countryside, a mild climate and many leisure facilities. Other nature-based amenities are those of the Red Sea and Arabian Gulf coasts and the SCT has identified 10,000 attractions overall. However, it should be noted that many well known landmarks have given way to development projects as part of the drive towards modernization, thereby reducing the country's attractiveness as a tourist center. Wildlife reserves are also under threat, despite a policy of public exclusion (Seddon and Khoja, 2003) which needs to be revised if ecotourism opportunities are to be maximized (Seddon, 2000).

The kingdom already has a satisfactory accommodation stock of 7,068

hotels and 41,000 rooms which is half that of the total volume for the GCC collectively. Most rooms are in Mecca and international chains control over 80% of five star properties. Another 50,000 hotel rooms and 74,000 apartments are planned in order to meet projected demand (ITP, 2003). Communications are also good and there are 22 regional and four international airports, Jeddah and Riyadh being the busiest, as well as an ever-expanding road network and extensive motorway system which will connect most regional centers by 2005 (Kirby, 2003).

Saudi Arabia thus exhibits both strengths and weaknesses as a tourist destination, the former indicative of scope for further expansion and a positive future. However, there are many uncertainties ahead and it is therefore valuable to seek the advice of experts regarding their opinions about the future as a foundation for decision making. The Delphi technique was selected as the most appropriate approach to this subject and is summarized below, followed by an account of its application in this particular instance.

RESEARCH METHODOLOGY:
THE DELPHI TECHNIQUE AND ITS APPLICATION

The Delphi technique is a qualitative forecasting tool which has been widely applied in various disciplines (Bolongaro and Gianni, 1994; Kaynak and Macauley, 1984; Kibedi, 1981; Mitchell and McGoldrick, 1994; Shuliang, Davies, Edwards, Kinman, Duan, 2002) In essence, the method attempts to make constructive and systematic use of informed intuitive judgments through a series of questionnaires which explore the knowledge and experience of a selected group with relevant expertise. The procedure allows a panel of chosen experts to refine their opinions in a series of stages until a consensus is reached. The method is obviously not foolproof and relies on subjective opinions (Sackman, 1975), but these are collected in a carefully planned and orderly program of sequential and impersonal exchanges. Communication can be conducted through various media including personal interview, the telephone, email and traditional mail.

The approach has proved especially popular with many marketing researchers (Bartos, 1989; Ford, 1975; Humby, 1991; Samli, Grewal and Mathur, 1988). Bolongaro (1994) for example, argued that the Delphi technique is more dynamic compared to other instruments which produce comparatively static results. It is helpful in picking up the weaker signals in the market, thereby assisting planners to predict changes that might occur in the business environment with greater accuracy. Michman (1987) also preferred the Delphi method and Lunsford and Fussell (1993) adopted it to examine export opportunities for Western firms in the emerging economies of certain Eastern and Central European states, leading to recommendations for constructing a business services marketing strategy.

A literature search also reveals the extensive adoption of the Delphi technique in the tourism and hospitality field (Evans, 1996; Faulkner, 1987; McCleary and Whitney, 1994; Ng, 1984; Poole, 1988; Ursal and Crompton, 1985), often within the context of destination marketing. Kaynak, Bloom and Leibold (1994) projected scenarios for the South African tourism industry until 2010 and Yeong, Kau and Tan (1989) explored the future of Singapore's tourism industry and possible marketing strategies to remain competitive. A more recent study was conducted by Tideswell, Mules and Faulkner (2001) to measure the domestic and international tourism potential of South Australia. Adopting an integrative forecasting model combining quantitative methods and the qualitative Delphi technique, the researchers succeeded in validating predictions for both types of visitor. In view of such studies, the Delphi methodology would seem a sound choice for evaluating the changing nature of Saudi Arabia's tourism and the challenges to be confronted in the future.

Major methodological considerations with regard to the current project were the selection of panelists, questionnaire design, feedback provision and the number of rounds of decision making. Martino (1983) and Dalkey (1969) proposed a minimum requirement of 15 to 20 panelists to achieve reasonable forecasting accuracy, but other researchers maintained that the number could range from only a few to more than 100 (Hellriegel, Jackson and Slocum, Jr., 2002). There appear to be no hard and fast rules and the optimal panel size depends on the nature and scope of the study as well as

the level of knowledge and expertise of those taking part.

Two panels of experts were invited to contribute in this case and the data was analyzed separately in order to enhance the validity of the results. Both panels consisted of key individuals in Saudi Arabia's tourism and hospitality industry and were classified into six groupings of government ministries; foodservice, hotels, airline industries; travel agencies and tourist attractions. Aiming for a final panel size of 15 and assuming a favorable response rate of 50%, a total of 30 correspondents were initially contacted. They were informed about the purpose, scope and the duration of the study and were invited either to participate personally or nominate someone whom they believed most suitable. There were a total of 20 positive responses, with each grouping almost equally represented. All the panelists had experience of the tourism industry as tourism academics, industry professionals or government staff. They had also traveled widely and acquired understanding of local, regional and world economies.

The first questionnaire was designed in accordance with prevailing market conditions in Saudi Arabia as well as in response to the ideas expressed by tourism industry personnel who were consulted. It contained generally worded questions which became more specific in later stages, building on the previous reactions. In phase one, the questionnaire asked respondents to assign probabilities to a list of tourism events or developments and provide reasons for their answers. A summary of the first set of results was prepared and the statistical report was distributed, along with an amended questionnaire. Panelists were requested to revise their estimates if they wished or justify their original opinion and, after this, a summary was produced which showed the emergence of consensus. The experts were then sent a third questionnaire and had to indicate whether they supported the stated propositions.

Three rounds of questioning were judged sufficient due to the fact that Saudi Arabia has an evolving market research culture, although more phases could have been added. Twenty-six event statements or scenarios were finally developed related to future trends in the tourism industry, the global environment, technological progress, regional collaboration and Saudi Arabia as a Middle Eastern tourism hub and a training center. Perceptions

were appraised of the probability of the occurrence of each event or scenario from zero to 100%. The popularity of Saudi Arabia as a result of tourism development and the year of probable success of Saudi Arabia as a popular destination were also ranked, the latter on a five point scale from 2005 to never (2005 being 100% probability and never being 0%). In addition to the questionnaire, the panelists were also supplied with secondary information to assist them in forming their estimates. The material included documents such as tourism related publications from the Ministry of Commerce, HTA, Saudi Chamber of Commerce, and articles from magazines and newspapers. The panelists were also encouraged to provide their own comments, documents or information to enrich the whole process.

The list of events and final responses of both panels are summarized in Table 1, with a discussion of the results in the next section. The table columns contain the probability and ranking figures for both the panels, with the former expressed as a percentage. The Mann-Whitney U test was applied after ranking all the probabilities in order from the lowest to the highest. When some probabilities were found to be repeat items, rank values were averaged to untie the data. The value of the Z statistic obtained through the Mann-Whitney U analysis was found to be -0.475 and it was determined that the critical Z value for an area of - 0.475 was 1.64, the sample U statistic further standardized (U - mU / ?U). The resulting Z score arrived at was -1.758 which was considered insignificant at the 0.05 alpha levels. This meant the sample statistic did not lie within the critical values of the test and it was concluded that the two samples were not the same, but independent of each other.

TABLE 1

Event	Panel A Probability	Rank	Panel B Probability	Rank
(1) Saudi Arabia is growing as a major tourist attraction for the entire world	50	3	5	1.5
(2) Tourism destinations of Saudi Arabia are gradually becoming attractive to foreign tourists as a result of regional collaboration	65	6	5	1.5
(3) Ancient castles, museums and other historical places and sand dunes will be accessible to foreign tourists in future.	70	12.5	60	4.5
(4) Visas for Saudi Arabia are relaxed now	70	12.5	60	4.5
(5) Transportation advances will continue lowering the travel expenses in Saudi Arabia	70	12.5	65	7
(6) Travel and tourism will be non-discretionary expenditure	75	17	65	7
(7) Local travel and tourism will continue growing rapidly in Saudi Arabia	80	24	70	12.5
(8) Saudi Airlines will keep on developing rapidly as a major international airline in terms of passenger volume and travel frequency.	80	24	70	12.5
(9) Riyadh, Jeddah and Dammam are gaining popularity as shopping paradises in the Middle East region	80	24	70	12.5

(10) Airlines, hotels, foodservices and retail industries in Saudi Arabia will require more specialized and formal education in the area of tourism and hospitality	83	30	70	12.5
(11) Top convention centers now exist in main commercial cities of Saudi Arabia	83	30	70	12.5
(12) Safety, security and political stability in Saudi Arabia are helpful in attracting foreign tourists to visit varied destinations.	83	30	75	18
(13) The Saudization drive in the country will result in promoting tourism destinations in future.	83	30	75	18
(14) Adequate training and education programs in tourism and hospitality exist to meet the demand for personnel in Saudi Arabia	83	30	76	20
(15) Business travel to the Kingdom of Saudi Arabia is threatened by video-conferencing, Internet, satellites, view phones and similar technologies	85	33.5	79	21
(16) The Saudi Riyal is a stable currency and will continue that way for a long time.	85	33.5	80	24
(17) The Saudi Riyal is increasingly becoming an exchangeable currency internationally	86	35	80	24
(18) As a result of tourism development, the Kingdom of Saudi Arabia will become a popular destination internationally.	90	38	81	27

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(19) The probability of saudi Arabia's success as a popular tourism destination will occur sfter year 2005	90	38		38
(20) The growing trend of sales over the Internet has an impact on tourism in saudi Arabia.	90	38		38
(21) Most of the hotels in Saudi Arabia offer room reservations via the Internet	92	41		42
(22) Saudi Airlines offers speedy service for self reservation through its websites.	100	48.5		43
(23) The Internet is gaining popularity for creating tourism prospects for Saudi Arabia	100	48.5		44
(24) Video conferencing will have a significant impact on large and small businesses in Saudi Arabia	100	48.5		48.5
(25) The website of the Supreme Commission will remain attractive to foreign tourists intending to visit Saudi Arabia.	100	48.5		48.5
(26) The advancement of telecommunication and IT networks will enhance tourism prospects of Saudi Arabia	100	48.5		48.5

The columns in the table above contain the forecast probabilities and the ranking figures for both Panel A and Panel B, expressed as a percentage. The probabilities reveal the response rating out of a hundred and the rankings indicate the comparative standing of each event compared to others in terms of their response rating. The two panels A and B were employed in the study to achieve objectivity and validity. The same criteria were employed by earlier researchers while using Delphi method (Yeong, W.Y., Kau, A. K. and Tan, L., 1989).

DISCUSSION AND RECOMMENDATIONS

There was not overwhelming support for the ideas that Saudi Arabia is growing in importance as a major destination worldwide with an increasing appeal to foreign tourists, perhaps reflecting a realistic assessment of current conditions. Local travel and tourism was viewed more favorably as likely to continue expanding quickly, encouraged by the relaxation of visa restrictions, and this indicates an appreciation of its mounting economic value. However, it was believed that Saudi Arabia could achieve greater success as a destination after 2005. Such a trend would be assisted by advances in transport and a lowering of costs and the improved accessibility of cultural and natural heritage attractions. Both panels endorsed the revival of traditional activities and members felt that emphasis should be given to devising new tourist attractions, improving recreational facilities and cultivating Saudi Arabia's image as a regional tourism center. Awareness of shopping facilities and the presence of convention centers were deemed to be significant. Travel and tourism was seen as essential expenditure, further boosting demand, and the Saudi currency to be stable and acceptable internationally. Safety, security and stability were recognized as key determinants of inbound tourism flows.

In terms of industry sectors, the national carrier was judged to have favorable prospects regarding its passenger volumes and services and to be already operating an efficient Internet reservation system. While it was generally agreed that training and education programs in tourism and hospitality were adequate, more specialized and formal education would be necessary in the future for the airline, accommodation, catering and retail industries. Information Technology was believed to be widely accepted with a marked trend towards Internet booking. Hotels would offer online reservations and the web pages of official agencies be used as a source of information. Improvements in telecommunications would also enhance the country's prospects, although video conferencing and other technologies could prove a threat to business travel.

With the latest advances in telecommunications, the panelists predicted that much Islamic travel would be booked and arranged through the Internet in future years. It was accepted that the latest developments have made an

array of potential products, services, and channels of distribution available that were previously either technically impossible or economically prohibitive. A basic substitution of broadband communication for business travel might impact negatively on the travel industry, but videotext services providing travel and shopping information in other countries could make international visits a more enjoyable experience. An international databank with tourist information would have implications for international tourism advertising and affect traditional distribution channels for products. Nevertheless, both panels also pointed out that there was under-utilization of the Internet in Saudi Arabia due to the quality of service and the literacy rate in the kingdom. In addition, its people do not always have confidence in transactions conducted by computer. Equipment such as video conferencing and satellite communications are only installed in a few large hotels so its availability should not be exaggerated.

The comments made suggest areas in which action might be taken in an attempt to capitalize on favorable trends and deal effectively with any anticipated problems. Evidence of long-term growth indicates a need for investment by both the public and private sectors. Government is responsible for providing the necessary infrastructure of communications and services with private funding needed for projects such as hotels, restaurants, shopping malls and recreation centers.

Existing tourism products should be refined in response to consumer demand, making use of the latest developments in science and technology. Opinion surveys could be conducted in order to monitor consumer attitudes and experiences, ensuring an appreciation of changing preferences. Efforts should be directed at creating new products that portray traditional ways of life which are likely to appeal especially to tourists from outside the region. The importance of culture and nature as tourism resources means that conservation measures are necessary to protect such sites and prevent their disappearance due to modernization and urbanization.

Intensified marketing is necessary with scope for greater collaboration between the public and private sector. The focus of promotion should be on neighboring GCC countries initially and then beyond in the longer term. Questions of safety and security, as well as religious and cultural

sensitivities, will need to be resolved if leisure tourists from Westernized nations are to be attracted in significant numbers.

The service sector is the backbone of tourism, yet there is room for great improvement in standards. While tourism traffic and revenue have grown substantially, the quality of service provided by hotels, restaurants, stores and travel agencies often remains disappointing. It is therefore imperative that initiatives be launched to raise standards and this is linked to the provision of education and training. There is an urgent need for vocational and executive training in the hospitality and tourism areas. Both panels agreed that new colleges to prepare management and technical staff should be opened in principal cities. Major universities could offer hospitality and tourism courses incorporated into their existing business curriculum, or even create new departments to run specialized programs. Leading hotels, restaurants and travel agencies should also encourage their staff to register for professional certification and upgrade their skills and competences.

CONCLUSION

Saudi Arabia is a unique tourist destination and its authorities have only recently turned their attention to matters of tourism development. Despite difficulties connected to internal and external conditions, expert opinion solicited through a Delphi survey confirms the view that the country has considerable unrealized potential. The basic infrastructure is in place and there is a wealth of tourist attractions, but new product development, packaging and intensified promotion will be critical to success. The current masterplan addresses many of these issues and it would seem appropriate to focus on domestic and regional markets first before looking to increase international arrivals. The plan also acknowledges the necessity of improving and expanding facilities and safeguarding natural and cultural assets. Whether the ambitious goals are achieved is still to be seen, however, and it will be interesting to follow the future evolution of Saudi Arabia's tourism.

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