| RESEARCH ARTICLE

Tourism as a Catalyst for Economic Diversification in Saudi Arabia: Vision 2030 and Beyond

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| ABSTRACT

Saudi Arabia's Vision 2030 reform program positions tourism as a cornerstone for economic diversification, aiming to reduce reliance on oil revenues and foster a knowledge-based economy. This paper critically examines the evolution of Saudi Arabia's tourism sector under Vision 2030, analyzing its economic, social, and cultural impacts while identifying key challenges and opportunities. Drawing on secondary data from the Saudi Ministry of Tourism, OECD, UNWTO, and World Bank, the study reviews flagship projects such as NEOM, the Red Sea Project, and Diriyah Gate. It also explores the role of technology, sustainability, and global partnerships in shaping the sector's future. The paper concludes with a comprehensive policy framework and actionable recommendations to ensure sustainable, inclusive, and competitive tourism growth by 2030.

1.   Introduction

Saudi Arabia has long been recognized as a global energy powerhouse, with oil revenues forming the backbone of its economy for decades (Abdelkawy et al., 2024). Energy market fluctuations, along with worldwide efforts toward cleaner power generation, pushed Saudi Arabia towards economic diversification. In response, Saudi Arabia launched Vision 2030, an ambitious reform program aimed at diversifying its economic base and reducing reliance on hydrocarbons (Ahmed, 2015). Among the key pillars of this strategy is the development of a robust tourism sector, envisioned as a catalyst for economic transformation and social modernization (World Bank, 2023).

Tourism, as a multidimensional industry, contributes to economic growth through job creation, foreign exchange earnings, and infrastructure development (OECD, 2023). For Saudi Arabia, the sector offers a unique opportunity to leverage its cultural heritage, natural landscapes, and strategic geographic position to attract international visitors. The government has introduced sweeping reforms, including the 2019 e-visa policy, and invested heavily in giga-projects such as NEOM, The Red Sea Project, and Diriyah Gate, signaling its commitment to positioning the Kingdom as a premier global destination (UNWTO, 2022).

Saudi Arabia is proactively addressing the inherent complexities of its rapid transformation through massive investment and stated commitments to reform. The challenges of regulatory streamlining and managing global competitive intensity are being acknowledged in the literature (Abedalrhman & Alzaydi, 2024), prompting significant foundational policy work by the Kingdom.

This paper, leveraging secondary data from key international and national sources (as detailed in Section 3), critically examines the evolution of Saudi Arabia's tourism sector under Vision 2030. It analyzes the sector's economic, social, and cultural impacts, contrasting the Kingdom's ambitious goals with the practical implementation challenges and opportunities identified. Crucially, the analysis culminates in a set of actionable policy recommendations derived from this study - such as proposed strategies for enhanced regulatory harmonization, sustainable governance, and strategic global branding-to guide the sector's long-term sustainability and competitiveness.

1.1 Research Objectives:

- To assess the economic contribution of tourism to Saudi Arabia's GDP and employment.

- To evaluate the role of flagship projects in shaping the tourism landscape.

- To identify challenges and propose strategic recommendations for sustainable growth.

2. Literature Review

2.1 Tourism as a Driver of Economic Diversification

Tourism is widely recognized as a strategic tool for economic diversification in resource-dependent economies (Callen et al., 2014). Studies on Gulf Cooperation Council (GCC) countries highlight tourism's potential to generate non-oil revenues, create employment, and stimulate private sector growth (Alhowaish, 2016; Waheed et al., 2020). For Saudi Arabia, tourism aligns with Vision 2030's objectives of reducing oil dependency and fostering a knowledge-based economy (Abuhjeeleh, 2019).

2.2 Best Practices in Tourism Development

International experiences demonstrate that successful tourism strategies integrate infrastructure development, regulatory reforms, and marketing initiatives (Schiliro, 2013). Countries like the UAE have leveraged mega-events, liberal visa policies, and luxury tourism offerings to position themselves as global hubs (Ali, 2018). These lessons underscore the importance of policy coherence and investment in human capital for Saudi Arabia's tourism ambitions.

2.3 Saudi Arabia's Tourism Transformation

Historically, Saudi tourism was dominated by religious travel, with Mecca and Medina attracting millions of pilgrims annually (Burns, 2007). Vision 2030 marks a paradigm shift toward leisure, cultural, and adventure tourism, supported by giga-projects such as NEOM and the Red Sea Development. Recent studies emphasize the sector's resilience, noting a 40% increase in tourism revenues between 2020 and 2022 despite global disruptions (OECD, 2023).

2.4 Challenges in Tourism Development

Literature identifies several barriers to tourism growth in Saudi Arabia, including restrictive social norms, regulatory inefficiencies, and environmental sustainability concerns (Ekiz et al., 2017; Al-Sarihi, 2019). Competition from regional players like Dubai, which attracted 18.7 million visitors in 2022, further intensifies the challenge (UAE Ministry of Economy and Tourism, 2023).

In line with Vision 2030's commitment to continuous improvement, the Kingdom is actively working to dismantle historical barriers and embrace regenerative practices. These high-level ambitions provide the context for overcoming the documented challenges. For instance, addressing regulatory inefficiencies and achieving sustainable growth requires strategic solutions, such as the proposed unified regulatory framework (7.1) and the implementation of mandatory, net-zero sustainability goals (7.5) for giga-projects like NEOM and the Red Sea. The success of the sector will depend on the efficacy of these targeted reforms in neutralizing historical limitations.

2.5 Emerging Trends: Technology and Sustainability

Technological innovations such as AI-driven visitor management, VR-based cultural experiences, and smart city initiatives are reshaping global tourism (Pratiwi & Muslikhati, 2024). Saudi Arabia's giga-projects incorporate these technologies, positioning the Kingdom as one of the leaders in smart tourism (Hassan et al., 2022). Concurrently, sustainability has emerged as a critical priority, with projects like the Red Sea Development pledging carbon neutrality by 2030 (Altalhi, 2023).

3. Methodology

3.1 Methodology

This study adopts a mixed-method approach, combining quantitative analysis of secondary data with qualitative review of policy documents and academic literature. Data sources include:

- Saudi Ministry of Tourism (2023) reports for GDP and employment statistics.

- Saudi Tourism Authority (2025) & Saudi Press Agency (2025) for tourism strategy & targets.

- World Bank (2023) and OECD (2023) for investment and sustainability data.

- (UNESCO) (2022) for cultural tourism and preservation protocols.

- UNWTO (2022, 2023) for global tourism benchmarks.

- Peer-reviewed studies on Vision 2030 and tourism diversifications.

3.2 Analytical Framework:

- **Economic Impact Analysis:** GDP contribution, employment growth, FDI inflows.

- **Comparative Benchmarking:** Saudi Arabia vs. UAE

- **Sustainability Assessment:** Environmental and social indicators.

- **Technology Integration:** Role of AI, VR, and smart city initiatives.

3.3 Limitations

Findings rely on secondary data; project projections remain subject to execution risk and macro conditions. Future research should add primary surveys of visitors, operators, and investors; firm-level panel data; and input–output or CGE modeling to quantify multipliers more precisely.

3.4 Saudi Tourism Under Vision 2030: Historical Context

Before Vision 2030, Saudi Arabia's tourism sector was almost exclusively religious, centered on Hajj and Umrah pilgrimages. In 2019, 18.5 million pilgrims visited Mecca and Medina, accounting for over 80% of total tourist arrivals (Saudi Ministry of Tourism, 2023). Non-religious tourism remained underdeveloped due to restrictive social norms and limited infrastructure (Burns, 2007).

3.5 Policy Reforms and Strategic Initiatives

Vision 2030 introduced transformative measures:

- **2019 e-Visa Policy:** Enabled citizens of 65 countries to obtain tourist visas online (UNWTO, 2022).

- **Institutional Reforms:** Establishment of the Saudi Tourism Authority and Saudi Commission for Tourism and National Heritage.

- **Investment in Giga-Projects:** NEOM, Red Sea Project, Diriyah Gate, and AlUla Vision.

3.6 Current Developments and Growth Trajectory

Saudi Arabia has committed $810 billion to tourism infrastructure, positioning the sector as a key economic driver (World Bank, 2023). The government aims to attract 150 million visitors annually by 2030, up from 18 million in 2019 (Saudi Tourism Authority, 2025).

Table 1: Tourism Growth Targets under Vision 2030

Metric	2019	2025 Target	2030 Target
GDP Contribution (%)	2.9%	5%	10%
Total Visitors (Million)	18	100	150
Jobs Created (Million)	0.9	1.5	3.0

Source: Saudi Ministry of Tourism (2023); Saudi Tourism Authority (2025).

3.7 Key Achievements So Far

- Tourism GDP share increased from 2.9% (2018) to 4.2% (2022).

- Revenue rose from $35 billion (2020) to $49 billion (2022) despite COVID-19 disruptions (Alam, G. N. (2021), showcasing the underlying resilience and strength of domestic tourism and initial international reforms.

- Employment in tourism grew by 44% between 2018 and 2022, reaching 1.3 million jobs (Saudi General Authority for Statistics, 2023).

4. Economic Impact, Employment Trends, and Case Studies

4.1 Economic Impact of Tourism on Saudi Arabia's GDP

Tourism has emerged as a critical pillar of Saudi Arabia's economic diversification strategy under Vision 2030 (Al Naimi, 2022). The sector's contribution to GDP has shown consistent growth, supported by large-scale investments and policy reforms.

Table 2: Tourism GDP Contribution and Revenue Growth (2018–2025)

Year	GDP Share (%)	Tourism Revenue (USD Billion)
2018	2.9	32
2020	3.2	35
2022	4.2	49
2025*	5.0 (Target)	70 (Projected)

Source: Saudi Ministry of Tourism (2023); OECD (2023).

Key Findings:

- **Revenue Mobilization:** Tourism Revenue saw a substantial increase from $32 billion to $49 billion in the four-year period, representing a Compound Annual Growth Rate (CAGR) of approximately11.2%. This high growth rate is vital for shifting the non-oil current account balance to a surplus.

- **Feasibility of Targets:** The jump to a 5% GDP target and $70 billion revenue projection for 2025 (Saudi Ministry of Tourism, 2023; OECD, 2023) is ambitious but appears feasible given the momentum, the launch of mega-projects, and the aggressive post-pandemic opening of the Kingdom. This positions the sector on track for the revised, more ambitious target of 10% GDP by 2030.

4.2 Employment Trends and Gender Inclusion

Tourism is a major employment generator in Saudi Arabia, creating 1.3 million jobs by 2022, up from 900,000 in 2018 (Saudi General Authority for Statistics, 2023). This volume of employment is critical for tackling national unemployment and is expected to continue growing to meet the 2030 goal of generating 1.6 million tourism-related jobs.

The rise in women's participation from 7% to 12% is a highly significant social and economic trend. This 5% point growth demonstrates the success of Vision 2030's policies, such as targeted training and flexible work initiatives, in leveraging a previously under-utilized segment of the domestic workforce (UNWTO, 2023). Increased female labor force participation is a crucial indicator of a modernizing and sustainable labor market.

4.3 Regional Disparities

While Mecca and Medina dominate religious tourism, regions like Asir and Najran remain underdeveloped, contributing less than 10% of tourism revenue (Awwad & Hamdan, 2023). Addressing these disparities is essential for balanced economic growth.

Regional Equity is the next strategic phase of Vision 2030's tourism strategy. The concentration of historical revenue in the Holy Cities now provides the capital and operational blueprint to unlock the untapped potential of cultural and adventure destinations like Asir and Najran. New policies such as Integrated Destination Plans (7.3) and Community-Based Tourism (CBT) Funds (7.10) should be deployed to ensure growth is geographically balanced and locally impactful.

4.4 Case Study 1: NEOM – The Futuristic Tourism Hub

NEOM is a $500 billion mega-project designed as a smart city integrating AI, renewable energy, and luxury tourism. It aims to attract high-income travelers and tech enthusiasts.

Table 3: NEOM Economic Impact Projections

Metric	Value
Investment Size	$500 Billion
Annual GDP Contribution	$48 Billion by 2030
Jobs Created	100,000+ by 2030
Expected Visitors	5 Million by 2030

Source: Saudi Ministry of Investment (2023) and Touati and Saad (2024).

4.5 Case Study 2: The Red Sea Project – Eco-Tourism at Scale

Overview:
The Red Sea Project spans **28,000 sq. km** with 90+ islands, aiming to position Saudi Arabia as a global leader in sustainable tourism (Altalhi, 2023).

Table 4: Red Sea Project Economic Impact

Metric	Value
Investment Size	$20 Billion
Annual GDP Contribution	$5.3 Billion by 2030
Jobs Created	70,000 by 2025
Sustainability Goal	Carbon Neutral by 2030

Source: Saudi Ministry of Tourism (2023) & Hussain (2017)

5.   **Flagship Projects, Regional Benchmarking, and Technology Integration**

5.1 Flagship Projects Driving Cultural and Heritage Tourism

Case Study 3: Diriyah Gate – Cultural Heritage Revitalization

Diriyah Gate is a $10 billion cultural tourism project aimed at restoring the birthplace of the Saudi state. It combines heritage preservation with luxury hospitality and retail experiences (UNESCO, 2022).

Table 5: Diriyah Gate Economic and Cultural Impact

Metric	Value
Investment Size	$10 Billion
Expected Visitors	50 Million visits by 2030
Local Economic Impact	$70 billion
Jobs Created	178,000 by 2030

Source: Saudi Ministry of Tourism (2023); UNESCO (2022) & Diriyah Company (2025)

Case Study 4: AlUla Vision – Archaeology Meets Tourism

AlUla, home to the UNESCO-listed Hegra site, is central to Saudi Arabia's cultural tourism strategy. The AlUla Vision Project aims to attract 2 million visitors annually by 2035, contributing $32 billion to the GDP (*Saudi Ministry of Tourism, 2023*)

5.2 Comparative Analysis: Saudi Arabia vs. UAE and Qatar

Saudi Arabia faces stiff competition from regional tourism leaders like the UAE and Qatar, which have established strong global brands through mega-events and liberal policies.

Table 6: Regional Tourism Benchmark

Country	International Visitors (Million)	Tourism Revenue (USD Billion)
UAE	18.7	45.5
Saudi Arabia	16.5	49

Source: UAE Ministry of Economy and Tourism (2023); Saudi Ministry of Tourism (2023).

5.3 Technology and Smart Tourism: The Digital Transformation

Saudi Arabia is leveraging advanced technologies to enhance visitor experiences and operational efficiency, positioning itself as a global leader in smart tourism.

Key Technological Innovations

1.   **Artificial Intelligence (AI)**

     o   **Smart Hajj Initiative:** AI-based crowd management during pilgrimages reduces congestion and improves safety.

     o   **Predictive Analytics:** Hotels use AI to forecast demand and optimize pricing (Pilgrim Experience Program, 2021-2025).

2.   **Virtual Reality (VR) and Augmented Reality (AR)**

     o   **VR Tours:** Virtual experiences of AlUla and Diriyah attract global audiences (Hassan et al., 2022).

o **AR On-Site Guides:** Enhance cultural understanding through interactive storytelling.

3. **Big Data and Personalization**

   o Data-driven insights enable customized travel packages, increasing visitor satisfaction by 25% (Saudi Ministry of Tourism, 2023).

4. **Smart Cities**

   o **NEOM and The Line:** Fully integrated IoT systems for energy efficiency and real-time visitor engagement (Abdelkawy et al., 2024).

Table 7: Technology Applications and Impact

Technology	Application	Impact
AI	Crowd management, dynamic pricing	30% improvement in visitor flow
VR/AR	Virtual heritage tours	$150M in bookings (2022)
Big Data	Market segmentation, personalization	25% higher satisfaction rates
IoT	Smart city infrastructure	Reduced energy consumption by 20%

Source: Saudi Tourism Authority (2025), Digital Defynd (2025) & Cloud Launch (2024)

6. **Sustainability and Social Impacts**

6.1 Sustainability and Environmental Goals

Saudi Arabia's tourism expansion under Vision 2030 is anchored in sustainability principles to ensure long-term viability. The Saudi Green Initiative targets a 60% reduction in carbon emissions by 2030, aligning with global climate commitments (Saudi Ministry of Environment, 2023).

Table 8: Sustainability KPIs for NEOM and Red Sea Project

Project	Renewables Commitment	Carbon Target	Circular Economy Focus
NEOM	100% Renewable Power	Net-zero operations by 2030	Zero-landfill waste management
The Red Sea Project	100% Renewable Power	Net-zero operations by 2030	Full circular waste and water management

Source: Saudi Ministry of Tourism (2023); Altalhi (2023) & Hamdi et al (2024)

6.2 Social Inclusion and Gender Empowerment

Tourism development has accelerated women's workforce participation, rising from 7% in 2018 to 12% in 2022, with a target of 30% by 2030. Initiatives like the Saudi Tourism Human Capital Development Strategy aim to train 300,000 citizens by 2025 for tourism-related roles (UNWTO, 2023).

6.3 Global Partnerships and FDI Trends

Foreign Direct Investment (FDI) in Saudi tourism infrastructure grew 35% between 2020 and 2023, driven by Public-Private Partnerships (PPPs) (OECD, 2023). Key collaborations include:

- **Red Sea Global** with international hospitality brands.

- **NEOM partnerships** with global tech firms for smart city solutions.

7. Policy Recommendations for Sustained Tourism Growth

The following comprehensive policy framework and actionable recommendations are based on the study's analysis of systemic friction, market potential, and long-term viability, and are presented to guide the next phase of Saudi tourism development. They address core barriers to sustained growth by focusing on regulatory discipline, market diversification, and resource management (Ramady, 2010).

7.1 Regulatory Harmonization & Seamless Market Access

Objective: Eliminate policy volatility and bureaucratic friction to establish a trusted, scalable environment for global business and travel.

Proposed Policy Actions

1. **Unified Tourism Regulatory Code**: Consolidate and harmonize zone-specific regimes (e.g., NEOM, Red Sea, Diriyah) with national norms to provide a single, intelligible visitor and investor rulebook with zone-specific annexes (AlNemer, 2024).

2. **Visa-as-a-Service Platform**: Commit to e-visa such as SLA of <30 minutes for priority markets; expand visa-on-arrival for the top source countries by arrivals and spend (UNWTO, 2023).

3. **Transparent Licensing**: Establish a 'single window' for tourism business licensing to address documented inefficiencies in investment environments (World Bank, 2023).

KPIs:

- Average e-visa processing time ≤30 minutes; approval rate >95% for low-risk markets.

- Licensing turnaround ≤10 working days for standard categories.

- Investor satisfaction >85% (annual survey).

7.2 Strategic Demand Stimulation & Global Branding

Objective: Shift perceptions and boost high-yield arrivals while smoothing seasonality.

Proposed Policy Actions

1. **Brand Architecture & Narrative**: Launch a unified "Saudi—Ancient to Avant-Garde" brand system with sub-brands for cultural, eco, adventure, and luxury segments (UNWTO, 2023).

2. **Aviation Policy**: Open skies on targeted city pairs; route-development funds and joint marketing with airlines/OTAs; grow direct long-haul to Riyadh/NEOM/Jeddah (World Bank, 2023).

3. **Major Events & MICE**: Anchor a global events calendar (heritage festivals, esports, design, sustainability forums) across regions, with yield caps to preserve carrying capacity.

4. **Co-op Marketing**: 50/50 matched campaigns with top operators in China, India, EU, and GCC.

KPIs:

- International arrivals to 80–100M (interim) with >15% YoY from new priority markets.

- Average spend/day up >20% vs. 2023 baseline.

- MICE share ≥10% of international arrivals.

7.3 Destination & Product Development (with Carrying Capacity Controls)

Objective: Build distinct reasons to visit—year-round.

Proposed Policy Actions

1. **Integrated Destination Plans**: Portfolio of 12 national destinations, each with a positioning strategy (e.g., Asir = cool-climate adventure, Najran = cultural-archaeological), phased capacity caps, and design codes (Awwad & Hamdan, 2023).

2. **Segment Plays**:

   - Religious tourism (Hajj/Umrah) experience & capacity upgrades with AI logistics.
   - Adventure: trails, safety standards, guides licensing in Asir, Tabuk.
   - Cruise & Coastal: Red Sea homeporting with sustainable shore-excursions.
   - Wellness & Desert Retreats: regulated wellness standards.

3. **Carrying Capacity**: **Visitor caps**, timed ticketing at icons (AlUla, Diriyah), and dynamic pricing.

KPIs:

- Regional dispersion index +30%.

- Average length of stay +1.5 nights.

- Overtourism incidents: zero breaches of set thresholds.

7.4 Human Capital, Skills, and Inclusion

Objective: Align workforce supply with demand; accelerate women and youth participation.

Proposed Policy Actions

1. **Tourism TVET 2.0**: Dual education with industry placements; national skills framework for hospitality, guides, sustainability, digital marketing (Saudi Ministry of Tourism, 2023).

2. **Recognition of Prior Learning (RPL)**: Fast-track certification of existing workers to raise service quality.

3. **Women's Economic Participation**: Flexible shifts, safe transport, childcare credits; leadership pipelines (OECD, 2023).

KPIs:

- 300,000 trained; women's share ≥ 20% interim, 30% by 2030.

- Service quality NPS >70 across priority destinations.

7.5 Sustainability, Conservation & Climate Resilience

Objective: Make Saudi a global benchmark for regenerative tourism.

Proposed Policy Actions

1. **Mandatory Destination Stewardship Plans**: For all priority destinations—nature-based limits, biodiversity net gain, water budgets (Altalhi, 2023; OECD, 2023).

2. **Green Taxonomy & EIA+**: Tourism-specific taxonomy with climate screenings; LEED/Estidama equivalents mandated for all projects (Hassan et al., 2022).

3. **Blue & Green Carbon**: Coral restoration, mangrove expansion; verified carbon credits for visitors/operators (UNESCO, 2022).

4. **Climate Adaptation**: Heat-management design (shade, microclimates), peak-season shifts, drought plans.

KPIs:

- 100% renewable operations in NEOM and Red Sea; Scope 1 & 2 net-zero at giga-projects.

- Protected area coverage expanded with no net loss of biodiversity.

7.6 Technology, Data, and Smart Tourism

Objective: Compete on experience quality and operational excellence.

Proposed Policy Actions

1. **National Tourism Data Platform**: First-party (bookings, telecom mobility) and third-party (OTA, airline) data with privacy-by-design, APIs for DMOs and SMEs (Saudi Ministry of Tourism, 2023).

2. **AI for Operations**: Extend Smart Hajj algorithms to crowded heritage and festival sites; demand forecasting and dynamic pricing (UNWTO, 2023; OECD, 2023).

3. **Immersive Layers**: VR previews and AR guides at AlUla/Diriyah; inclusive, multilingual content (Hassan et al., 2022).

KPIs:

- Visitor satisfaction +25%; overbooking −20%; AI-enabled crowding incidents −50%.

7.7 Infrastructure, Access & Last-Mile Experience

Objective: Reduce friction from door-to-destination.

Proposed Policy Actions

1. **Open Skies & Slots**: Prioritize NEOM/Red Sea corridors; multi-modal hubs linking rail, air, and coach.

2. **Wayfinding & Accessibility**: **Multilingual signage**, universal design; digital wayfinding in-app; EV charging corridors.

3. **Smart Border & Baggage**: Biometrics, e-gates; point-to-point baggage services for pilgrims and cruise guests.

KPIs:

- Door-to-door travel time to priority destinations −20%; connection reliability +15%.

- Accessibility score (independent audit) ≥85/100.

7.8 Investment, PPPs & Finance

Objective: Crowd in private capital while safeguarding public value.

Proposed Policy Actions

1. **Standardized PPP Toolkit**: Risk-sharing templates, step-in rights, tariff guidelines (World Bank, 2023).

2. **Investor Concierge & Aftercare**: One-stop support; land-banking with transparent disposal; fast-track for strategic investors.

3. **Green Sukuk & Sustainability-Linked Loans**: Scale financing for low-carbon infrastructure and nature-positive projects (OECD, 2023).

4.

KPIs:

- FDI inflows +35% vs. 2023 baseline; $100B cumulative by 2030 (target cited in policy discourse).

- Average PPP closure time −30%.

7.9 Governance, Delivery & Accountability

Objective: Ensure execution at pace with joined-up governance.

Proposed Policy Actions

1. **National Tourism Council**: Chaired at ministerial level; integrates aviation, culture, environment, municipalities; quarterly delivery reviews.

2. **Tourism Delivery Unit (TDU)**: PMO with OKRs, traffic-light dashboards, public scorecards (Saudi Ministry of Tourism, 2023).

3. **Destination Management Organizations (DMOs)**: Chartered powers for product, stewardship, and promotion; performance-linked funding.

KPIs:

- On-time delivery of 80% milestones; public dashboard live; independent audit annually.

7.10 Regional Equity, SMEs & Community Value

Objective: Spread benefits beyond mega-hubs; Asir and Najran as exemplars.

Proposed Policy Actions

1. **Destination Competitiveness Grants**: Capex/Opex support tied to sustainability and inclusion KPIs.

2. **Community-Based Tourism (CBT) Fund**: Microgrants for authentic culture, crafts, homestays; fair-value chains (UNWTO, 2023).

3. **SME Accelerator**: Mentoring, vendor-readiness for giga-project supply chains.

KPIs:

- Regional share of visitor nights +25%; SME participation +40%; household income uplift tracked.

7.11 Cultural Heritage Stewardship & Authenticity

Objective: Protect and elevate Saudi identity through tourism.

Proposed Policy Actions

1. **Heritage Protection Protocols**: Archaeology-first construction, artifact management, intangible heritage curation (UNESCO, 2022).

2. **Authenticity Standards**: Design codes, local material quotas, culinary provenance labeling.

3. **Festival Charter**: Balance global appeal with cultural integrity; curatorial boards with local scholars.

KPIs:

- Visitor cultural satisfaction ≥85%; heritage incidents = zero; local creative sector spend +30%.

8. Conclusion — From Momentum to Maturity

Saudi Arabia has effectively pivoted from aspirational intent to decisive investment and execution in the tourism sector. Macro indicators (GDP share, revenues, jobs, inclusion) have demonstrated a clear and sustained upward trajectory since 2018, validated by foundational regulatory reform and the execution of flagship projects.

To successfully achieve the target of 10% GDP contribution and 150 million visitors by 2030, this study recommends the Kingdom transition from a project-first to a system-first delivery model. This proposed transition requires: a harmonized regulatory spine; credible and publicly audited sustainability performance; robust destination-level stewardship; evidence-led marketing; professionalized Destination Management Organizations (DMOs); and transparent, results-based KPIs.

Executed with discipline and integrity, this comprehensive framework positions Saudi Arabia not only to meet its Vision 2030 goals but also to set a global benchmark for regenerative tourism—competitive on experience quality, cultural depth, and climate credibility. The path from growth to global leadership demands disciplined delivery, honest measurement, and an unwavering commitment to the people and places that make the Kingdom unique.

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