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RESEARCH NOTE



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Saudi Arabian Tourism Patterns and Attitudes

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In 2000, Saudi Arabia established the Supreme Commission for Tourism to facilitate national tourism development, a move likely to herald massive tourism expansion in the new century. To date, Saudi tourism has tended towards the mass market, in sites of natural beauty and milder climate. However, developments have proceeded without environmental impact assessment, and tourist activities are starting to degrade the natural resources on which the industry depends. The National Commission for Wildlife Conservation and Development (NCWCD) was created in 1986 to manage wildlife reserves (Child and Grainger 1990). By 2000, the commission administered 14 sites, encompassing more than 50,000 km². Management of reserves has been through public exclusion, and although NCWCD has moved towards greater stakeholder participation (Seddon 2000), reserves have not provided for nature-based tourism. There is concern that, if NCWCD does not take a lead in providing regulated public access to wildlife areas, unsustainable development may encroach onto reserve boundaries. Because of a dearth of information on consumer attitudes, this preliminary study sought to gain an understanding of how Saudis spend vacations, interest in nature-based recreation, and the activities and facilities appropriate for reserve development. There are three types of tourist: Saudi nationals (in excess of 16 million), pilgrims (5 million annually),

and expatriate residents (about 7 million). The latter two are not considered in this study.

A personal administration technique was used, and wide geographic coverage sought, in collation of questionnaires by NCWCD staff in regional centers. The staff solicited responses from those visiting NCWCD information centers, and from friends and acquaintances. Responses are not a representative sample of Saudi society; in particular, wealthy elite and nomadic herdsmen are two under-represented sectors, whereas middle-class Saudis may be over-represented. Therefore, results should be viewed as indicative of general patterns only and subject to future confirmation. During 1999, 202 tourist questionnaires were compiled from the Mecca, Medina, Al Jouf, Qassim, Hail, Riyadh, and Eastern Province Emirates. Because of social restrictions, Saudi women were not canvassed.

Of 202 respondents, 120 (59%) were married, 79 (39%) single, and 3 unrecorded. The mean number of children per family was three (range 0–12; median 4), while 189 people indicated their annual income: 42% fell into the <\$1,300 and \$1,300–\$2,600 month ($\times 3.75$ for Saudi Riyals) categories, respectively; 14% earned \$2,600–\$5,300, and 2% earned >\$5,300/month. There were 180 respondents who took between seven and 130 days of annual vacation (mean 52.8 days; mode 30; median 30–40). Altogether 169 responses indicated that none to 90 days vacation were spent away from home (mean 23 days; mode 30; median 21). There was no difference in mean time away between international (24.0 days) and domestic (23.7 days) tourists. Most holidays were taken in summer. There was preference for domestic (59%) over international destinations (41%). Respondents who chose international destinations provided four reasons: shopping (18% of respondents); cooler climate (11%), lower prices (9%), and facilities and attractions (62%). Social constraints may prompt some to seek less restrictive attractions outside Saudi Arabia. The most popular domestic destinations were mountains (33%), coasts (26%), and holy cities (16%). Although there is appreciation of desert landscapes, there is strong attraction to greener, wetter, cooler regions.

Overall, 55% of respondents traveled by private car, 44% flew, and the remainder went by bus. However, there were differences with transport to destinations: 82% of domestic holidaymakers used private car, whereas 82% of international tourists used commercial flights. Once at their destination, 87% of domestic vacationers used private car, 9% used rentals, and 4% taxis; whereas travel at international locations was more often by rental car (52%), than private car (25%) or taxi (23%). Use of personal transport may reflect the importance of privacy to Saudi families, as it permits partial relaxation of the obligation upon women to remain hidden from public view. On average, \$714/week was spent (\$102/day), ranging from \$11 (tent) to \$4,000. There was a difference between domestic (mean \$556) and international (mean \$945) expenditure. A 1993 survey (Saudi Chambers of Commerce unpublished data), suggested weekly expenditures of \$467–\$560 and \$1,027, for internal and external tourists, respectively. If, on average, Saudis spend \$135/day while overseas, and an estimated 3 million Saudis take vacations overseas annually, then \$405 million is spent per vacation day. With a mean of 24 days spent on international holidays, annually \$9.7 billion is spent by Saudis on holiday outside the Kingdom. Nationally, lack of tourism infrastructure, absence of promotion of internal destinations, and fiercely hot summers, have resulted in 83% of Saudi vacation time being spent in other countries (Ady and Waller 1989, 1992). By the 90s, tourism amounted to <1% of the national economy. The need to limit leakage has focused attention on development of the Saudi tourism industry (Ady 1996; Ady and Waller 1992).

Of 198 respondents, 62% indicated preference for self-contained apartment

accommodation, 23% opted for 5-star hotels, the remainder used tents (10%) or 2-star hotels (5%). Self-contained accommodation suits Saudi cultural preferences for privacy. Widely pursued activities were sightseeing, shopping, visiting friends and relatives, hunting, walking, and picnicking. This reflects a cultural identity associated with the outdoors and implies potential interest in reserve visits. Respondents answered yes or no as to whether they would choose specific activities within reserves: 72% would take tours, 64% would camp, 58% walk, and 43% drive around. Respondents were asked to rate their level of interest in specific scenic site activities. Day visits were rated either "very high" or "moderate" by >94%; guided tours and animal viewing were highly rated by >80%. Overnight visits were rated "low" or "no interest" by ~58%. Respondents chose whether they would like to have any of up to 10 listed facilities within a reserve. Campsites, toilets, guides, children's playground, restaurant, and wildlife displays were chosen by the majority, whereas driving trails, snack shop, picnic areas, and hiking trails were selected by a minority. This indicates preferences for more passive, site-focused attractions over those that are more active and independent.

These findings suggest that vacationing Saudi families have the means and the interest to support future protected area tourism development. Clearly this study has limitations, arising from often culturally-based difficulties, such as gaining equal access to all sectors of Saudi society. In particular, the recreation activities of very affluent versus semi-nomadic families, and women's attitudes to nature-based recreation, are two aspects that warrant further attention. The NCWCD, in collaboration with the Supreme Commission for Tourism, will embark on the creation of pilot projects through which ecotourism product refinement and development of best-practice guidelines can provide examples for the latent Saudi Arabian nature-based tourism industry. **A**

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