Designing the development of National STS: KSA case

Saudi Commission for Tourism & Antiquities (SCTA)
Tourism Information & Research Centre (MAS)

Dr. Mohammed Al-Ahmed
A focus in Saudi Arabia
- Household door-to-door large survey
- Commenced in July 2002
- Monthly...nationwide
- Sample size (22) thousands face-to-face interviews.

Residents of Saudi Arabia travelling within the country
..for more than one night but less than a year
...outside of their usual environment
**Domestic Tourism - Key Findings: 2008**

### Day Trips
- **2007:** 1,123 Thousand
- **2008:** 1,274 Thousand
- **Change:** 13%

### Tourist Trips
- **2007:** 28,549 Thousand
- **2008:** 28,775 Thousand
- **Change:** 1%

### Nights
- **2007:** 188,403 Thousand
- **2008:** 189,285 Thousand
- **Change:** 0%

---

**Purpose of Visit**

**Type of Accommodation**

**Top 5 Destinations**

**Expenditure by Category**

---

**TOTAL SPENT IN SR (M)**

**2007:** 18,396
**2008:** 20,069
Residents of other countries travelling to Saudi Arabia
...for more than one night but less than a year
...outside of their usual environment
...not getting paid within Saudi Arabia

- Measure volume and characteristics of the international visitors
- Large Sample survey - (24) thousands.
- Face-to-face interviews
- Commenced in July 2002
- Monthly…nationwide
- Airports, Seaports and Land Borders

Inbound Tourism - Key Findings: 2008

Day visitors
2007: 2,124
2008: 2,960
Change: 39%

Tourist Trips
2007: 12,466
2008: 14,757
Change: 18%

Nights
2007: 162,773
2008: 223,868
Change: 38%
Outbound Tourism

Residents of Saudi Arabia traveling out of the country …for more than one night but less than a year …outside of their usual environment

- Essential for economic impact measurement
- Household survey (with domestic)
- Commenced in July 2002
- Monthly…nationwide
Tourism Supply Side

- Annual survey measuring the supply-side of tourism.
- Commenced on 2003.
- Personal interview with the owners.
- Cover Monthly Accommodation Statistics and Annual Key Economic Indicators for tourism establishments.

TES
- Complete census of all tourism establishments.
- Covers the major (22) cites in KSA.
- Completed on 2008.

Accommodation Statistics

- Track the accommodation sector on a monthly basis

Key indicators:
- Room occupancy rate
- Bed occupancy rate
- Guests per room
- Average length of stay
- Achieved room rate

Hotel Room Occupancy Rate by Month 2007-2008

Furnished Apartments Occupancy Rate by Month 2007-2008

Saudi TSA
Measuring the Economic Impact of Tourism

How much do tourists spend?
What do they spend it on?
Where is the money spent?
What impact does it have on the economy?
What employment does it create?
What does it contribute to GDP

TSA 2004-2008

Tourism GDP and its Ratio to GDP

<table>
<thead>
<tr>
<th>Year</th>
<th>Contributions to GDP (%)</th>
<th>Contribution to GDP including Oil Sector (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>4.9</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>5.1</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>6.4</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>7.4</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>6.8</td>
<td></td>
</tr>
</tbody>
</table>

Employment in Tourism 2004-2008 (1000)

<table>
<thead>
<tr>
<th>Year</th>
<th>Direct Employment</th>
<th>% of Saudi</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>318</td>
<td>20</td>
</tr>
<tr>
<td>2005</td>
<td>332</td>
<td>20</td>
</tr>
<tr>
<td>2006</td>
<td>356</td>
<td>22</td>
</tr>
<tr>
<td>2007</td>
<td>427</td>
<td>22</td>
</tr>
<tr>
<td>2008</td>
<td>486</td>
<td>24</td>
</tr>
</tbody>
</table>

Tourism GIG

Integrates all Tourism Databases and presented geographically

www.tourismmap.scta.gov.sa
Tourism Research and Studies

- Quick response statistics (cover SCTA events and activities around KSA)
- Tour and Umrah operators’ survey
- Tourism industry: challenges and solutions Study
- Perceptions Study
- Qualitative Study for visitors of 3 countries (UAE, Egypt and Malaysia)
- Seasonality Issues & Solutions Study

Tourism Research and Studies

- Tourism Social and Cultural Impacts on Local Communities
- Economic Impact of Tourism Study
- Media Campaign Evaluation study
- The youth requirements of tourism events study
Thank You

الهيئة العامة للسياحة والآثار

Saudia Commission for Tourism & Antiquities

Tourism Information and Research Centre

المملكة العربية السعودية

Kingdom of Saudi Arabia