



SAUDI TOURISM ASSESSMENT REPORT

# Saudi Tourism Assessment Report



A proprietary initiative of AMC Insights and TGM Research

# Content of Report

01

Overview & Study  
Background

- KSA tourism at a glance and key milestones
- Study objectives
  - Context and motivation behind conducting this study
  - Research design

02

Segmentation  
Overview

- Introducing the four segments identified
  - High Potential Intenders (HiPos)
  - Budgeted Explorers
  - Non-Intenders
  - Past Travelers
- Profiling of segments

03

Understanding  
Engagement  
Initiatives

- Awareness of Tourism Campaigns
- Sources of Awareness
- Assessment of visitsaudi.com, tourism campaign, football initiatives and transit visa

04

Exploring Each  
Segment

- Understanding motivations and constraints within each segment
- Areas of improvement
- Understanding past travelers' journey, experience and challenges faced

05

Diving into Each  
Category of  
Interaction

- Penetration of categories (e.g., hotels, flights, telecom)
- Experience and brands interacted with

06

Summary &  
Recommendations

- Summarizing the key findings
- Discussing recommendations and implications



# About Study

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Our comprehensive research study, '**Saudi Tourism Assessment Report (STAR)**' is a groundbreaking resource designed to empower businesses, policymakers, and industry professionals with a deep understanding of the Saudi Arabian tourism market

This study goes beyond surface-level insights to provide an **invaluable toolkit** even on tourist segments and categories for success in one of the world's most promising tourism destinations

STAR provides subscribers with a **strategic direction, enabling them to make informed decisions**, seize lucrative opportunities, and excel in the dynamic and promising Saudi Arabian tourism market. This comprehensive report delves into the level of interest tourists have in visiting the Kingdom, **uncovers motivators and barriers** to visiting or not visiting KSA, explores **opportunities and challenges** they encounter within the country, and examines the **categories and brands they engage** with during their journeys

## Benefits can be sought from this study:

- **Inform Decision-Making:** Provide valuable insights for informed decision-making by government, tourism authorities, and brands operating under the targeted categories
- **Enhance Tourism Strategy:** Tailor strategies to specific traveler segments, optimizing experiences and offerings
- **Improve Marketing Efforts:** Optimize marketing channels and messages based on identified sources of information
- **Mitigate Barriers:** Address obstacles to travel, such as visa processes, safety concerns, and misconceptions

- **Increase Revenue:** Boost local businesses and the economy through visitor spending
- **Foster Cultural Exchange:** Promote cultural exchange and understanding between Saudi Arabia and other countries
- **Promote Sustainable Development:** Balance tourism growth with environmental and cultural preservation

## Core Objectives of the Study



**Categorize** potential tourists into distinct segments based on their travel behavior and resources



**Determine the sizing** of the segments



**Understand the triggers and motivation** to travel to Saudi Arabia, including cultural, historical, business, and religious factors



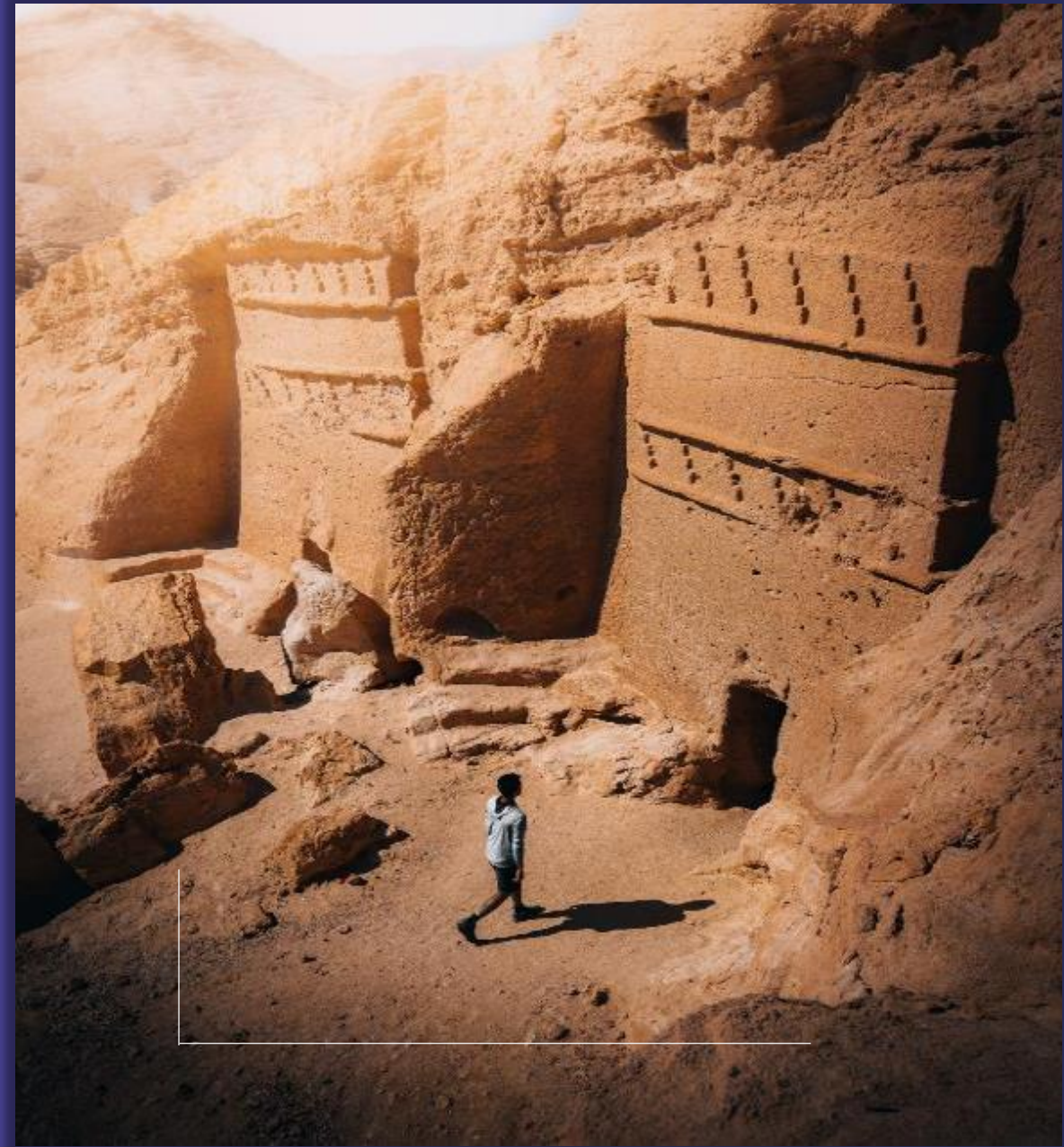
**Examine the challenges** and obstacles faced by tourists, such as visa processes, safety concerns, misconceptions, and financial constraints



**Identify the primary sources of information**, that influence tourists' decisions about Saudi Arabia, such as online platforms, social media, recommendations, and official government channels



**Explore** the targeted categories' interaction and experience



# **Breaking Boundaries:** A Pioneering Study Spanning 12 Countries on 4 Continents, the First of its Kind in Saudi Arabia, Capturing Insights Beyond Our Borders



## **Target Group:**

Plan to travel to KSA in the next 1-2 years

## **Study Coverage:**

USA, UK, France, Turkey, Egypt, Kuwait, Qatar, UAE, Pakistan, India, Indonesia and Malaysia

## **Data Collection**

**Technique:** Online interviews

## **Sample Size: 2,400**

(200 per country except for Kuwait and Qatar which was 100 each)

## **Fieldwork Timelines:**

Q4 2023



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# Segments Definition

## Example Slides taken from report

### High Potential Intenders (HiPos):

Intend to travel and have financial resources to travel



Mr. Jordan

### Budgeted Explorers:

Intend to travel and do not have financial resources to travel



Ms. Emma Clarke

### Non-intenders:

People who do not want to visit KSA



Chris and Emily

### Past Travelers:

People who have ever traveled to KSA



Mr. Khalid Mahmoud

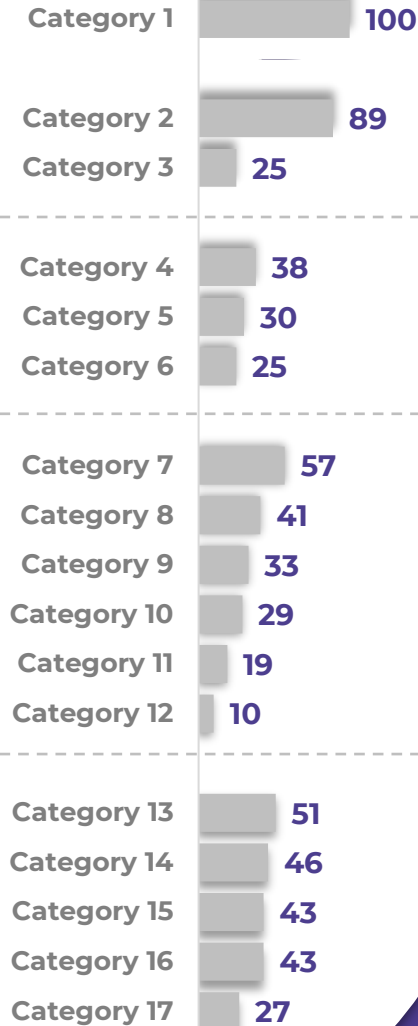
Understand all tourist segments, their sizes, and their respective profile to make more informed decision for lucrative opportunities

# Categories interaction and Experience

Past travelers in KSA effortlessly engaged with all necessary categories, expressing satisfaction.

Insights on 17 different necessary product categories

## Penetration



## Expenditure

Contributing %

## Experience

Top Box

Top 2 Box

Category	Contributing %	Top Box	Top 2 Box
Category 1	XX%	XX%	XX%
Category 2	XX%	XX%	XX%
Category 3	XX%	XX%	XX%
Category 4	XX%	XX%	XX%
Category 5	XX%	XX%	XX%
Category 6	XX%	XX%	XX%
Category 7		XX%	XX%
Category 8		XX%	XX%
Category 9		XX%	XX%
Category 10	XX%	XX%	XX%
Category 11		XX%	XX%
Category 12		XX%	XX%
Category 13	XX%	XX%	XX%
Category 14	XX%	XX%	XX%
Category 15	XX%	XX%	XX%
Category 16	XX%	XX%	XX%
Category 17	XX%	XX%	XX%



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Top box score out of a scale of 1-5 with 1 = Poor and 5 = Excellent



# Awareness of Saudi Tourism - Campaigns

XX%

are aware of any Saudi Tourism Campaign

XX% Muslims

XX% Non-Muslims

## Sources of Campaign Awareness



YouTube



Word of Mouth (WOM)



Facebook

## Top recalled Campaigns



Hajj & Umrah

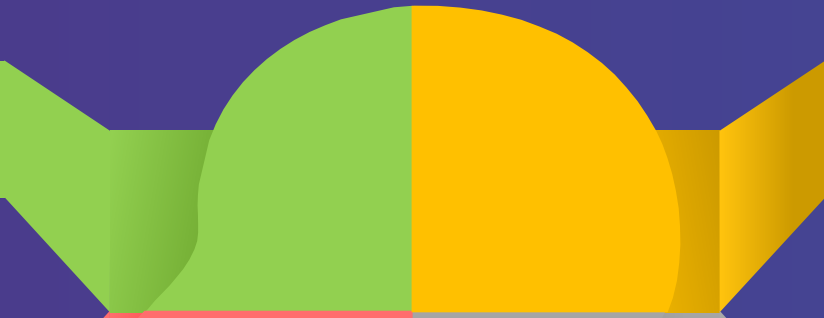


Welcome to KSA



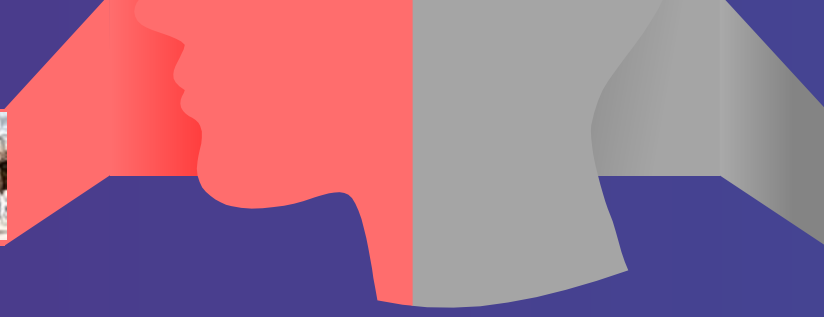
AIUa Campaigns

HiPos (XX% aware)



Past Travelers (XX% aware)

Budgeted Explorers (XX% aware)



Non-Intenders (XX% aware)



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