

# Saudi Arabia Tourism Report Q4 2016

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Date: August 2016

Pages: 34

Price: US\$ 1,295.00 (Single User License)

ID: S93494C2368EN

## Abstracts

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**BMI View:** Saudi Arabia's tourism industry presents significant growth potential. The market has long been based upon the enormous number of religious pilgrims that visit each year and extensive transport and accommodation infrastructure has been built up to support this huge inbound arrivals market. Outside of this sector there has been limited development, however the government is reportedly committed to expanding tourism under economic diversification plans which could see Saudi Arabia opened up to a broader range of leisure tourism visitors, in turn stimulating investment in the hotel sector and other supporting leisure and retail infrastructure. This growth potential is heavily dependent upon security, both within Saudi Arabia and throughout the unstable Middle Eastern region.

### Key Updates And Forecasts

Religious tourism will remain the main focus of the industry in Saudi Arabia. The government is targeting 15mn Umrah pilgrims to Makkah by 2020, rising to 30mn by 2030. At present, our forecasts put total tourism arrivals at 14.8mn by the end of our current forecast period in 2020, though some upside risk is presented by extensive government investment in transport and accommodation infrastructure to facilitate greater pilgrimage numbers.

Prince Sultan bin Salman, the head of the Saudi Commission for Tourism and National Heritage, has reportedly affirmed the country's intention to become more open to tourism visitors, including a proposal to reintroduce group tourism visas for non-Muslim visitors from countries such as the United States, the UK, Germany and Japan.

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