

Implementation of Saudi Vision 2030 Towards Saudi Arabia's Internationally Open Tourism Industry

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ABSTRACT

The existence of globalization encourages access to worldwide economic development that does not solely rely on one sector, especially in the tourism sector. Saudi Vision 2030, in foreign policy theory, is perceived as Saudi Arabia's strategy to diversify the country's economy. The decline in global oil prices has resulted in the swelling of the state deficit. Under the leadership of Prince Muhammad bin Salman, the Saudi Arabian Government undertook efforts to diversify the revenue sector, aiming to reduce the country's economic dependence on crude oil exports. Through Vision 2030, tourism is prioritized as a significant contributor to state revenue. The development of tourism components and the opening of new tourist destinations are forms of implementation initiated by the government based on the Saudi Vision. This research combines the theory of foreign policy and tourism concepts employed by the government of Saudi Arabia. The qualitative research method uses secondary data from literature studies, including journals, books, official websites, and articles. The results indicate that the realization of Saudi Vision 2030 in the tourism industry is through the development of tourism components in hotels, transportation, and restaurants and the opening of new tourist destinations, specifically in culture and adventure tourism

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1. Introduction

The existence of globalization encourages access to worldwide economic development that does not solely rely on one sector, especially in the tourism sector. Tourism is a complex global phenomenon due to its influence on economic, political, social, cultural, environmental, and educational sectors. The region currently experiencing this tourism phenomenon is the Middle East. Its unique and beautiful geographical conditions make the Middle East a predicted top tourist destination (Abuhjeeleh, 2019, bl 2). Saudi Arabia, officially known as the Kingdom of Saudi Arabia (*Al-Mamlakah Al-'Arabiya As-Saud'diyah*), is one of the most prominent countries and is considered the focal point of the tourism industry in the Middle East.

The extraordinary cultural and historical background, diverse natural resources, and unique natural beauty are special tourist attractions (Rehman & Alnuzhah, 2022, bl 1118). Nonetheless, Saudi Arabia's tourism industry has focused on religious pilgrimages for decades, with most Muslim visitors traveling for religious purposes (Abuhjeeleh, 2019). The presence of two significant Muslim holy places in Saudi Arabia, namely Mecca and Medina, makes the country the heart of the Islamic world.

Saudi Arabia's current wealth is inseparable from its Islamic heritage and history (Azyumardi, 2004). Additionally, the abundance of natural resources, such as oil and gas, has a significant impact as the primary source of income in the trade (export) sector, contributing to its status as a developed and prosperous country (Samuelson, 2014). However, in 2014, various social, political, and economic changes and a decline in world oil prices affected several countries, including Saudi Arabia.

The drop in oil prices profoundly impacted Saudi Arabia's economic decline. This occurrence prompted the country to reassess its heavy reliance on revenue from oil and gas exports. The government composed various policies to strengthen the economy, reducing dependence on non-renewable natural resources such as oil and gas, which are finite and subject to depletion.

In April 2016, Prince Muhammad bin Salman authorized a long-term strategy for the Kingdom, a series of policy instruments to strengthen Saudi Arabia's economy by reducing its dependence on oil exports (Sana N. Khan, 2020, bl 233). The policy instrument designed to rejuvenate the economy is known as Saudi Vision 2030. This Vision outlines the economic and social transformation of Saudi Arabia by 2030. In addition to breaking Saudi Arabia's reliance on the oil sector, Saudi Vision was formulated based on three key pillars that foster economic and social improvement. Firstly, the presence of the cities of Mecca and Medina encourages Saudi Arabia to play a pivotal role in the Islamic and Arab world. Secondly, Saudi Arabia's geography allows it to transform into a global investment powerhouse. Thirdly, its strategic location significantly influences Saudi Arabia's endeavors to become a global trade center, connecting Asia, Europe, and Africa (Sana N. Khan, 2020).

Under Vision 2030, the tourism industry is one of the prioritized economic sectors in Saudi Arabia (Kingdom et al., 2016, bl 183). Vision 2030 directs the government to take actions that will create international-standard attractions, fostering economic development to realize a dynamic society. Within the framework of Vision 2030, Saudi Arabia's tourism industry bolsters with four pillars: (1) proliferate the tourism market, (2) unlock the door for enterprise, (3) rich culture heritage sites and iconic sights, and (4) new mega tourists destination under development (Sana N. Khan, 2020). So, the goal is to have the tourism industry support the country's income, with the GDP reaching 10% and the number of visiting tourists reaching 100 million by 2030, pushing Saudi Arabia to become a global tourism destination (Nursalikhah, 2022).

This research is based on a compilation of findings from previous studies, where the author identified a gap in understanding the development of the Saudi Arabian tourism industry as perceived by the international community. Drawing on Muhammad Abuhjeeleh's PhD research (2020) titled "Rethinking Tourism in Saudi Arabia: Royal Vision 2030 Perspective," the study focuses on elucidating Saudi Arabia's political commitment to integrating and supplementing tourism as an alternative source of income. This research involves the ease of specific rules to attract more international tourists. The results reveal that prioritizing tourism as a critical economic revenue stream supports the radical transformation of the Kingdom of Saudi Arabia (KSA) in both political and economic spheres.

In the research conducted by Mohammed Alawi Al-sakkaf, Zurina Mohaidin, and Yulita Hanum P. Iskandar (2020) titled "Residents' Perceptions Toward Support for Tourism Development in Saudi Arabia," the focus is on the impact of the tourism industry under Saudi Vision 2030, encompassing socio-cultural, economic, and environmental aspects. The findings reveal Saudi Arabia's pursuit of new sources of income through developing potential sectors, such as tourism, to address social reforms in cities like Riyadh, Jeddah, and Dammam.

Meanwhile, in the research by Ayman Sherbini, Yuhanis Abdul Aziz, Samsinar Md Sidin, and Raja Nerina Raja Yusof (2016) titled "Income Diversification for Future Stable Economy in Saudi Arabia: An Overview of the Tourism Industry," the discussion centers on the development of Saudi Arabia's religious tourism destinations under Saudi Vision 2030. The development is the focal point, with significant implications for marketing strategies, service quality, and tourist satisfaction.

Based on three previous studies, the author will examine the implementation of Saudi Vision 2030 in the Saudi Arabian tourism industry with a specific focus. This paper aims to identify the manifestations of tourism industry development as implemented by the government of Saudi Arabia. This research will use a qualitative method that uses secondary data from books, journals, articles, and official websites.

2. Materials and Methods

In his book "Business Research," Uma Sekaran suggest that a framework is a conceptual model illustrating how theory relates to various factors identified as significant problems (Hardani, S.Pd. et al., 2020). Based on the background, the author combines foreign policy theory and tourism concepts as fundamental understanding for analyzing the phenomenon in the study.

Foreign Policy

According to Miriam Budiardjo, foreign policy is perceived as a type of policy crafted by a country, representing a collection determined by decision-makers in their pursuit of goals and possessing the authority to implement it (Budiardjo, 2003). In his book "World Politic: An Introduction," James N. Rosenau contends that foreign policy entails a country's endeavors, encompassing overall attitudes and activities, to derive benefits from the external government. Valerie Hudson defines *foreign policy* as "the strategy or approach chosen by the national government to achieve its goals in its relations with external entities, including decisions to take no action" (Kusumawardhana, 2021). Meanwhile, according to Holsti, foreign policy constitutes the comprehensive actions and activities undertaken by a state to respond to the conditions of its external environment, to gain advantages, and to consider internal factors that support the formulation of action (Holsti, 1992).

Talking about foreign policy must be connected to what becomes the 'goal' of the state when it decides to engage with actors on the international stage (Kusumawardhana, 2021). The goal to be achieved is currently referred to as national interest. K.J. Holsti stated that, in general, a country's national interest consists of 3 criteria, namely:

- a. Vital interest (related to the core values of the state, such as sovereignty and ideology),
- b. Medium-term interest (related to materials such as economic welfare), and
- c. Long-term interest (related to the ideals of the state on the international stage, such as wanting to become a great power).

This theory is applied by examining Saudi Vision 2030 as Saudi Arabia's policy in achieving its national interest. Saudi Vision was formed to achieve economic prosperity through the non-oil and gas sector (Syahputra & Prasadjo, 2023, bl 74). Economic prosperity, in the national interest, is achieved by prioritizing various sectors, including developing the tourism industry. This tourism development aims to increase the attractiveness of foreign tourists coming to Saudi Arabia.

Tourism Concept

Tourism is a complex activity seen as an extensive system with various components such as economic, ecological, political, social, cultural, and so on (Suwena & Widyatmaja, 2017). According to Mill and Morison (1985), tourism is closely related to moving places in a system where each part is interrelated like a spider's web. In Leiper's book (2004:8), Jordan sees tourism as a system. So, the tourism system is an order of components in the tourism industry where each component is intertwined and related to form something comprehensive. The tourism industry is the relationship between goods and services to facilitate tourist travel (Utama, 2014).

In the tourism system, some components must be fulfilled to ensure the feasibility of the tourism industry. These components include attraction, accessibility, accommodation, and amenities (Gautam, 2021).

- a. *Attractions* are activities offered to fulfill tourist satisfaction. These attractions consist of natural attractions and artificial attractions.
- b. *Accessibility* is the availability includes land, water, and air transportation.
- c. *Accommodations* are the existence of units provided to meet needs. Accommodation is classified into two types, namely service accommodation and additional accommodation.
- d. *Amenities* are part of the facilities that must be present and addressed to make people visit at home and be comfortable.

Tourism includes various types, such as cultural/heritage, rural, sports, and adventure (Kingdom et al., 2016). Meanwhile, according to Mike Robinson, tourism is categorized into therapeutic, cultural, scientific, safari/adventure, and religious (Robinson, 2007).

- a. *Therapeutic tourism* combines treatments that offer physical and emotional treatment. This tourism is also often called health tourism, which is a combination of medical and wellness trips that provide health improvement, maintenance, and prevention that emphasize relaxation and beauty of appearance (Kementrian Kesehatan, 2012).
- b. *Cultural tourism* is motivated to discover, study, and consume cultural heritage attractions or products (UNWTO, 2017).
- c. *Scientific tourism* involves tourists participating in knowledge creation and scientific dissemination conducted by research and development centers (Valdivia, 2019).
- d. *Safari tourism or adventure tourism* is a tourist activity that includes physical activities, cultural exchanges, or activities in nature. Meanwhile, according to sung, Morrison, and O'Leary (1996), adventure tourism has six major dimensions: activities, experiences, performances, environments, motivations, and losses (Kingdom et al., 2016).
- e. *Religious tourism* is religiously related tourism that brings together various background with a common goal of admiration and protection of cultural heritages of a religious nature.
- f. *Rural tourism* is a tourism activity that involves local communities.

This concept is applied by looking at the program run by the Saudi Arabian government under Saudi Vision, which refers to tourism. Saudi Arabia's tourism development, which relies on four pillars in the Saudi Vision, is targeted to increase foreign tourist arrivals. Proliferate the tourism market and unlock the enterprise outline of the openness of Saudi Arabia to the outside world. These pillars have an impact on foreign interest in coming to visit Saudi Arabia. Through these two pillars, Saudi Arabia Invests in advancing Saudi tourism, especially developing tourism components. New mega tourists under development and rich cultural heritage sites and iconic sights are Saudi Arabia's steps in creating new tourist destinations. The new destination is a step in renewing tourist destinations carried out by Saudi Arabia based in Vision 2030, namely in cultural and adventure tourism.

3. Result and Discussion

Saudi Arabia's Tourism Industry Before Saudi Vision 2030

Beautiful and unique natural conditions also charm Saudi Arabia's tourism. According to the British Broadcasting Corporation – BBC (2013) explanation, the two primary keys underlying tourism in Saudi Arabia are religion (faith) and visiting family or friends. The percentage of tourist visits is also known, with 60% of tourists visiting for religious purposes and 21% for family visits. From these figures, the main tourists in Saudi Arabia are tourists visiting for religious purposes. They are Muslim from various countries worldwide who participate in worship activities such as Hajj and Umrah (Abuhjeeleh, 2019). The existence of the Kaaba in Mecca (Masjidil Haram) and the Prophet's Mosque in Medina makes Saudi Arabia the heart of the Islamic world. Moreover, the holy cities are where Hajj and Umrah are performed (Sana N. Khan, 2020).

Despite having a variety of unique and historical places, Saudi Arabia's tourism industry still needs to be developed. Various factors that drive the lack of development of Saudi Arabia's tourism industry include the conservative image of Saudi Arabia, limited infrastructure, limited tourism promotion, limited visa access, and the lack of diversification of tourist attractions in Saudi Arabia.

Its conservative image gives a negative response to international tourists, which results in a low desire to visit Saudi Arabia. Religion that has been embedded in the placement of morals, ethics, structural values, and institutional systems has socio-cultural consequences that lead to one mecca of civilization in addition to Arab norms and values, namely Islam. Against this backdrop, the Kingdom of Saudi Arabia is Islam's spiritual home and birthplace (Abuhjeeleh, 2019). Thus, conservative interpretations exist of the application of life based on different Islamic values in the concept of International tourism, where there is no alcohol freedom, gender segregation, and strict dress codes (Al-Hamarneh & Steiner, 2004, bl 185). This rule leads to an inherent tension in accommodating religious and cultural values based on Islamic values, which impacts the strictness of existing regulations and limits movement and activities for visiting international tourists (Jafari & Scott, 2014, bl 13). The tourism regulations in Saudi Arabia are that women without mahram cannot perform Hajj or travel, women must wear an abaya, alcohol is not traded, tourist attractions between men and women are separated, and hotel rentals for the opposite sex must be with a marriage certificate (CNN Indonesia, 2022).

Infrastructure limitations are also a factor in the underdevelopment of Saudi Arabia's tourism industry. The lack of accommodation, accessibility, and facilities in Saudi Arabia encourages foreign tourist not to make Saudi Arabia their destination. Apart from that, Saudi Arabia's infrastructure is of a quality that does not reach international standards in the availability of services and companies such as hotels, transportation, public sanitation, facilities for people with disabilities, and many more (Ekiz & Oter, 2017, bl 8).

Transportation is one of the essential things in the infrastructure that develops tourism in Saudi Arabia. In 1979, SAPTCO formed land transportation, a publicly owned company overseeing Riyadh's bus network operation, management, and maintenance (Mukhtar, 2023). This service provides bus transportation connecting ten major cities in Saudi Arabia. On air transportation, Saudi Arabia has 26 airports with four well-known airports for foreign tourists: King Abdulaziz International Airport in Jeddah, King Khaled International Airport in Riyadh, King Fahd International Airport in Dammam, and Prince Muhammad bin Abdulaziz International Airport in Medina. In the sea transportation, Saudi Arabia has 21 ports, with two prominent ports, namely Jeddah Islamic Port (the busiest port in Saudi Arabia serving Muslims in the holy cities of Mecca and Medina) and King Abdulaziz Port or Dammam Port that is the largest port in the Persian Gulf which is the leading maritime gateway for goods to the east of Saudi Arabia and the central region (The Embassy of the Kingdom of Saudi Arabia, 2018).

Every year, the number of tourists visiting Saudi Arabia increases and touches more than 10 million people (Annur, 2023). The number of tourists who come is not proportional to the number of fleets that are still limited and only reach some regions of Saudi Arabia. The limited fleet is also influenced by the prohibition of women from using public transportation and impacts the preference for using private vehicles. The government's focus on Hajj pilgrims and international students also impacts the availability of transportation to meet their needs only at certain times. The need for more information about transportation in Saudi Arabia significantly impacts tourists, making it difficult to make mobilizations (Chaniago & Tashandra, 2023).

Hotels are one of the critical infrastructures in developing the tourism industry. In 2011, there were approximately 951 hotels in Saudi Arabia with approximately 140,000 rooms (USDA Foreign Agricultural Service, 2013). Meanwhile, tourists visiting Saudi Arabia reached 17.4 million visitors (100 times more than the number of hotel room available). Stringent Islamic rules influence the small number of hotel rooms available. Strict restrictions on the interaction of women and men who are not

family, the lack of entertainment facilities in hotels, the high cost per room, and Arabic as the primary language spoken are factors in the lack of hospitality in the Saudi Arabian tourism industry. These regulations also make tourists in Saudi Arabia feel uncomfortable with the limitations of hotels and their facilities.

In 2010, the number of restaurants in Saudi Arabia reached 26,166, and cafes reached 2,244 (USDA Foreign Agricultural Service, 2013). Although this number is quite large, restaurants and eateries in Saudi Arabia are still one of the limitations for visiting foreign tourists. This is due to several things, such as limited menu variations, strict cultural rules, strict food and beverage regulations, and logistical problems (Himpuh, 2022). The variety of menus served in each restaurant is relatively the same, which impacts low consumption levels due to boredom with the same menu every time they eat. The limited menu is influenced by the strict food and beverage regulations in Saudi Arabia regarding its halal status. Saudi Arabia requires that every food, beverage, and ingredient be registered with the Saudi Food and Drug Authority (SFDA). The existence of regulations with applicable standards makes it difficult for imported food products to reach the Saudi Arabian market. Meanwhile, in the reality of tourism, tourists want a variety of foods with different flavors from their place of origin as a form of new experience (Himpuh, 2022). Moreover, in international tourism, the lack of availability of alcoholic beverages is also one of the factors that keep foreign tourists from visiting Saudi Arabia. Its conservative image influences Saudi Arabia's cultural rules with a background of Islamic values in the regulation of daily life. Therefore, restaurants have operating times that are by strict cultural rules. For example, during the call to prayer, restaurants must close temporarily to perform worship, or restaurants must follow limited operating hours and respect the time of breaking the fast. This is a barrier that makes non-Muslim foreign tourists feel uncomfortable about the strict regulations.

Visa limitations also reduce foreign tourists' interest in visiting Saudi Arabia. Saudi Arabia's visa procedures are stringent (Jafari & Scott, 2014). Given its conservative image and its regulations based on Islamic values, tourist requirements for visas are put forward to ensure that they understand and respect the cultural and religious rules. In addition, its strict regulations are aimed at maintaining the country's security by including background checks and document validation for prospective travelers to obtain visas. Saudi Arabia granted visas oriented towards business visas, hajj, umrah, and Visiting Friends and Relatives (VFR) visas as the main reasons for visa approval (Ekiz & Oter, 2017).

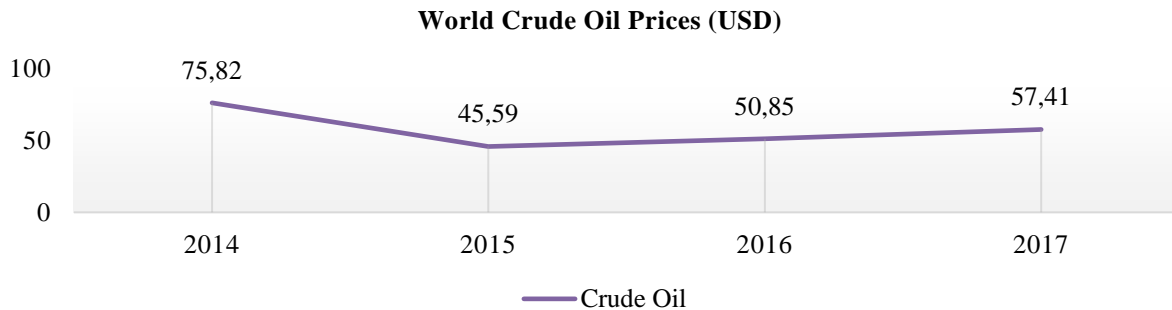
The available attractions revolve around the religious sector, which impacts tourists' difficult access for purposes other than pilgrimage or religion (Abuhjeeleh, 2019). Vital cultural and religious factors make the Saudi Arabian government limit the development of attractions for international tourism that do not comply with social and religious norms. The many historical sites related to Islam, such as Mecca and Medina, make Saudi Arabia focus on religious and historical tourism. Apart from that, the number of attractions available is still relatively small, and it is not easy to find sports venues, playgrounds, and other entertainment venues (Rehman & Alnuzhah, 2022). The harsh geographical conditions and climate of the Saudi Arabian region, which has high temperatures, influence the types of outdoor attractions, which are minimal. However, domestic pressures such as local interests colliding with global interests, as well as social mission tension and commercial pressures, have an impact on hampering development and ending in limited tourist attractions in Saudi Arabia.

Saudi Arabia's Economic Decline

The continuity of economic activity depends on more than just the production of goods and services. However, it is also closely related to using natural energy, including petroleum. Oil is an essential fuel, with every country's demand for petroleum very high. Oil is a vulnerable product. Its price can change at any time according to supply and demand. As a vital need, oil must be fulfilled because it impacts globally. Abundant oil countries assemble world oil demand, including Saudi Arabia (World's Top Exports, 2018).

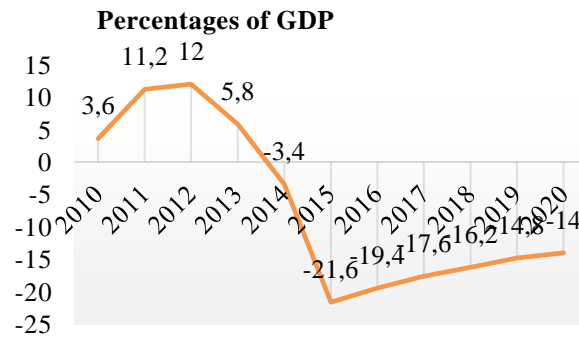
Saudi Arabia has quite a lot of natural resource wealth that can boost the economy, such as oil and gas (Syahputra & Prasodjo, 2023). With the oil boom in 1970-1980, Saudi Arabia became a wealthy country with high revenues from oil exports, with amounts six times better than before (Torchia & Rashad, 2017). Saudi Arabia has dominated the world oil market for decades due to its abundant oil reserves. The petroleum sector has contributed around 87% of revenue, 42% of GDP, and 90% of export earnings (Forbes, 2018). With Saudi Arabia's oil reserves providing significant revenues, the country nicknamed the Arabian Peninsula relies on its economic axis in the oil export sector. So, oil price fluctuations significantly impact Saudi Arabia's undiversified economy.

In 2014, world oil prices experienced a decline. When the stock exchange closed at the end of the year, the cost of crude oil originating from the North Sea and West Texas Intermediate (United State) as an international benchmark had decreased by 45% since the previous year (VOA Indonesia, 2015). At the end of this year, The Organization of the Petroleum Countries (OPEC) announced that the selling price of oil would be below USD 70, which would significantly impact the economies of OPEC member countries (Kingdom et al., 2016). As Saudi Arabia's preferred export commodity, global prices are now weakening oil and gas, resulting from increased international economic competition.



Graphic 1. World Crude Oil Prices (Source by: <https://tradingeconomics.com/commodity/crude-oil>)

In early 2015, crude oil prices fell sharply, reaching below USD 50/barrel (May, 2017). The decline that has occurred since 2014 is caused by excess supply resulting from the energy revolution in America. Apart from that, several other factors were interrelated, leading to the fall in world oil prices. Starting from the global economic downturn were causing world commodity prices decrease, including crude oil, to decline. The economic slowdown impacted the increase in the value of the American dollar, pushing up prices through new policies from Donald Trump and the FED (May, 2017). The increase in the dollar's value impacts the devaluation of the value of the Yuan, which leads to pressure on oil prices. Pressure on oil prices has caused global oil demand to decline. This got worse when the energy revolution carried out by America was responded to by OPEC (led by Saudi Arabia) by increasing oil production. The response that showed fear of being defeated by America led to an abundant oil supply and a decline in oil prices.



Graphic 2. Saudi Arabia's GDP through Oil Exports 2010-2020 (Source by: IMF by <https://www.theguardian.com/world/2015/oct/07/oil-price-slump-turns-saudi-surplus-into-huge-deficit-imf-report-shows>)

The fall in crude oil prices is Saudi Arabia's nightmare, causing a severe budget deficit (Sandria, 2021). Initially, the Saudi Arabian government's budget deficit -3.4% swelled to -21.6%, resulting in economic decline and a social crisis (Elliot, 2015). Considering the economic situation, according to a CNN report published on October 26, 2015, Saudi Arabia will run out of cash in less than five years (Kingdom et al., 2016).

Saudi Vision 2030 As Saudi Arabia's Global Strategy

In 2015, Saudi Arabia changed the leader of the Kingdom from King Abdullah to King Salman, his younger brother. Then, King Salman promoted his 29-year-old son, Muhammad bin Salman, to a strong power position. First, he became Minister of Defense of the Kingdom of Saudi Arabia, then in the same year, in April, he was appointed Deputy Crown Prince. And in June 2017, King Salman officially gave the title of Crown Prince to Prince Mohammad bin Salman (Roll, 2019, bl 7).

Since the 1970s, the amount of revenue from crude oil sales in total government revenue has averaged more than 80% and even more than 90% between 2010-2014. The fall in world oil prices in 2014 significantly impacted the swelling of the state budget deficit and created new challenges for Saudi Arabia in maintaining its political and economic stability (Roll, 2019). But, current socio-economic developments, according to the Crown Prince (Prince Muhammad bin Salman), pose a severe political challenge. Not only is the drop in world oil prices a threat to Saudi Arabia, but the ongoing high population growth of 2%, rising unemployment of around 38.8% in the 20-24 year age group, and the possibility of a drastic decline in global oil demand as a result of these changes technology as well as the energy revolution gave worsened Saudi Arabia's public financial situation in the next few decades (Roll, 2019).

Therefore, under the direction of Prince Muhammad bin Salman, in 2016, a policy was passed by the Government of Saudi Arabia as a form of strategy to stop the economic decline. The initiative is the first step towards economic diversification to restore Saudi Arabia's economy and eliminate dependence on oil. This initiative is Saudi Vision 2030, which contains a series of policy programs to achieve a transformational vision to encourage more developed economic and social sectors (Saudi Embassy, 2017). The transformation policy implemented by Saudi Arabia through Saudi Vision is a long-term policy that implements vital reforms to achieve success in the public sector, economy, and society (Kingdom of Saudi Arabia, 2016).

The implementation of Vision 2030 as Saudi Arabia's global step is intended to increase economic growth through diverse transformation in the country's economy (Roll, 2019). However, what is most important is the change in the economic sector, which is no longer dependent on oil, but

rather the diversification of the economy, which has an impact on public finances, people's standard of living, population, and the development of the private sector in the future (Roll, 2019). The three main themes of the Saudi Vision that support the achievement of the main pillars are a vibrant society, a thriving economy, and an ambitious nation.

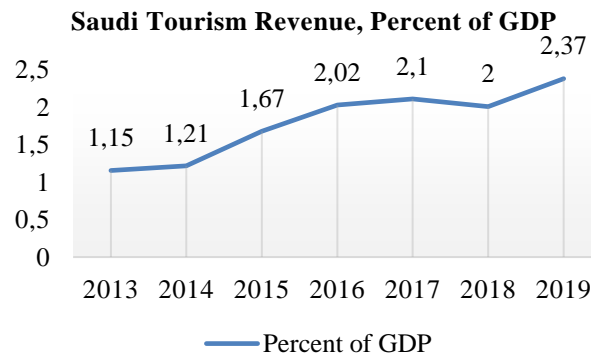
A vibrant society is a theme that aims to build a society that enjoys a healthy life and fulfills its dreams with the power of a strong economy (Sana N. Khan, 2020). Vision 2030 seeks to build strong, happy, and fulfilled society as the foundation of prosperous economy. This is the focus of the Saudi Vision, which was formed to create a society with solid roots, giving rise to a representation of modern Islam with national pride as well as the heritage and culture of Saudi Arabia, which also contributes globally (Kingdom of Saudi Arabia, 2016). In achieving true happiness and satisfaction for all citizens, the theme of a vibrant society prioritizes physical, psychological, and social well-being. Therefore, Vision 2030 was formed by supporting this theme to create a society with a high-quality standard of living in a healthy and attractive environment (Kingdom of Saudi Arabia, 2016). Thus, the steps taken by the government through Saudi Vision are revitalizing social development, strengthening kinship by providing character education, and building an empowering social-health service system. This is intended to create a productive society with solid foundations.

A thriving economy is a step towards building an economy that is well-diversified and free from dependence on income from the oil sector. This theme was formed to create an environment that encourages economic growth followed by employment opportunities for all Saudi citizens, where these jobs take advantage of Saudi Arabia's unique location and potential. So that through this tremendous potential, new talents will emerge, bringing good luck to Saudi Arabia, which will impact increasing global investment (Kingdom of Saudi Arabia, 2016). Saudi Arabia's future is determined by the younger generation, encouraging the government to take steps to prioritize skills empowerment. Through Vision 2030, the KSA is starting to open itself to business globally. To realize the dream of becoming a country with a leading global economy, the Saudi Arabian government is making improvements to the business environment, restructuring cities with high economic opportunities, building special zones, and deregulating the energy market so that it is competitive in the international realm (Kingdom of Saudi Arabia, 2016). Thus, promising new sectors will open up through investment and privatization of government services in sustainable economic diversification (Kingdom of Saudi Arabia, 2016).

An ambitious nation is a theme that encourages the development of a country that is managed effectively, transparently, and accountably so that society is encouraged to advance the future through the business world and non-profit organizations by identifying opportunities (Kingdom of Saudi Arabia, 2016). This theme aims to empower everyone to play an active role in shaping the future of the Saudi Arabian nation. The government carries out this empowerment as a form of responsibility for changes and new challenges in the contemporary era. By considering the changes and challenges that will be faces, the government is committed to being transparent and accountable in managing finances efficiently, effectively, and agilely and monitoring performance. The belief influences this in opportunities from various existing sectors that have a role in developing a more advanced country (Kingdom of Saudi Arabia, 2016). Everyone significantly impacts Saudi Arabia's development, whether as business owners, non-profit leaders, or private citizens.

In 2013-2015, Saudi Arabia's GDP from the tourism sector was relatively low, not reaching 2%. However, during this period, there was also accurate and definite growth. This is seen as an opportunity for the tourism sector to become a contributor to Saudi Arabia's income. Through this Vision, economic diversification is carried out by developing various sectors, including tourism. So, under Saudi Vision 2030, Prince Muhammad bin Salman is pushing for a new history for Saudi Arabian tourism. Muhammad bin Salman wants the Kingdom of Saudi Arabia to become a domestic and international holiday destination for tourists (Sana N. Khan, 2020). For Saudi Arabia, tourism is a combination of two meanings of religious tourism; it adheres to Islamic values and contains sacred

sites important to Muslim (Kingdom et al., 2016). By looking back at the goals of Vision 2030, namely improving fund management, increasing investment, which impacts economic development, and creating a dynamic society, tourism is one of the prioritized sectors in Saudi Vision 2030.



Graphic 3. Percentages of Saudi Arabia's Tourism revenue (Source: https://www.theglobaleconomy.com/Saudi-Arabia/international_tourism_revenue_to_GDP/)

Through Saudi Vision 2030, the Saudi Arabian government is trying to change its image and reputation by carrying out national branding and being more open to the outside world to attract foreign tourists (Lina, 2022). Saudi Arabia's openness to the international world can be seen through Saudi Arabia's efforts to develop non-religious tourism to attract foreign tourists to visit. The regulatory changes to encourage this openness include changes to tourist regulations, such as women can travel without a mahram in Saudi Arabia, marriage certificates no longer accompany hotel rentals, women are not required to wear abayas, and beach tourism areas for women and men are united and free to wear bikinis (Dayana, 2019). There are ten new regulations issued by the Saudi Arabian government and effective from March 25, 2023, including those related to tourism hotel facilities, travel and tourism services, tour guides, management of tourism hotel facilities, tourism consulting, private tourist hotel facilities, trial activities, inspection of tourism activities, as well as committees consider violation of tourism laws and tourist destination. This aims to support Saudi Arabia's economic diversification in the tourism industry sector (CLYDE&CO, 2023).

The development of tourism as one of the major industries that is reviving Saudi Arabia's economy, has several goals to be achieved.

- a. Develop a tourism and entertainment sector that is friendly to foreign tourists.
- b. Increase economic diversification and reduce dependence in oil by developing the tourism sector.
- c. Contribute to GDP by 10% by serving 100 million tourists annually and providing 1 million jobs.
- d. Reducing gender segregation where women participate in the tourism sector.
- e. Increase institutional capacity in managing economic change.

Therefore, Vision 2030 guides the government in taking actions that create international standard attractions in Saudi Arabia (Kingdom et al., 2016). This can be interpreted that Saudi Arabia's tourism will be developed as an industrial sector that will increase state income by 10% by 2030. Under Vision 2030 formed by Prince Muhammad bin Salman, the development of Saudi Arabia's tourism industry will rely on four pillars, namely proliferate the market for tourism, unlock doors for enterprise, rich cultural heritage sites and iconic sights, and new mega tourist destinations under development (Sana N. Khan, 2020).

In achieving the main goals of Vision 2030, Saudi Arabia is realizing a "thriving economy" through global investment with the capacity to create opportunities for all its citizens (Saudi Arabia Government, 2022). Saudi Arabia's economic diversification through investment, one of which is the tourism sector. After the ratification of Saudi Vision 2030, the Public Investment Fund (PIF) was

formed to become a global force and the primary driver of Saudi Arabia's economic transformation (Saudi Arabia Government, 2022). As one prioritized industry in Saudi Arabia's economic development, tourism in Vision 2030 has four pillars that underlie every step the Government takes in building tourism progress. In investing in developing the tourism sector, the government established the Tourism Development Fund (TDF) as an institution that facilitates local and international investors in developing Saudi Arabia's tourism sector (Tourism Development Fund, 2021).

Development Of Tourism Components In Saudi Arabia

In developing the tourism component, several programs are aimed at improving the quality of tourism infrastructure, such as airports, roads, and public transportation, as well as increasing the number of accommodation and facilities, such as hotels and restaurants (Suwena & Widyatmaja, 2017). This is done through efforts to increase accessibility, accommodation, and amenities for tourists. This development requires many contractors at various level to develop tourism throughout the country based on Vision 2030. This development opens up opportunities for foreign companies to join in the development of Saudi Arabia towards modern tourism. This is targeted to attract many investors and increase the competitiveness of the Saudi economy. Investments are made with private partnerships that can build infrastructure facilities with capacity, international standards, and quality.

Hotel

Based on Vision 2030, the growth of hotel investment in Saudi Arabia is influenced by several factors, including the construction of hotels to accommodate foreign immigrants who come as a form of effort to increase the tourism sector (Cahyani, 2021). This hotel development program through investment aims to open up opportunities for foreign investors to create opportunities for economic diversification in Saudi Arabia. Investment in hotel construction is focused in developing the tourism sector through the staycation concept (Margrit, 2018).

According to TDF, several investment agreements have been formed involving many giant investors from various corners to advance hospitality in Saudi Arabia. One of which is an investment in the hotel sector of SAR1.5 billion with a global hotel developer based in England, namely Ennismore and Al Rajhi Capital (ITP Media Group, 2022). Hilton Group also expands in various locations in Saudi Arabia, with more than 75 hotels in the coming years (Alshammari, 2022). Rimal AlKhubar Estate Co also announced an investment collaboration with TDF on May 25, 2022, in the construction of a 5-star hotel in the eastern province of Saudi Arabia with a nominal value of SAR 238 million (Global Trade Alert, 2022). Radison Hotel Group also announced plans to expand operations in Saudi Arabia in 2026.

In 2017, USD11.6 billion of investment was made to build on religious and domestic tourism growth, especially on expansion projects focused on hotel investment. According to a report from SCHAT (2018), around 70% of expansion projects are in Medina and Mecca (Abuhjeeleh, 2019). The significant increase in the number of room available to tourists means that hotel construction in Saudi Arabia is beginning to expand. Under Sudi vision 2030, the hotel sector in Saudi Arabia is expected to reach 310,000 hotel rooms by 2030. This was achieved with investment of USD110 billion (Ali, 2023).

In 2023, according to STR hotel industry data, Saudi Arabia had 42,033 hotel rooms under construction in March. This accounts for 35.1% of the total 119,505 rooms under construction in Saudi Arabia, placing it second only to China and the United States in leading the global hotel construction market. The hotel sector being developed by Saudi Arabia is projected to be able to generate USD2.51 billion in revenue in 2023. Meanwhile, in 2027, it is estimated that the hotel sector will generate revenue of USD3.02 billion with an occupancy rate of 75.5% (Ali, 2023).

Transportation

Through Saudi Vision 2023, the Saudi government is actively seeking to reform governance structures and regulations to pave the way for market liberalization and private-sector participation

(Hohnholz, 2023). This is aimed at the government's open plan to issue business permits for infrastructure construction with foreign investors that offer equipment and standards that meet internationally. Revitalization of transportation construction was carried out to facilitate mobility in Saudi Arabia. The high rate of sustainable urbanization growth is a significant factor in developing transportation infrastructure. Under Saudi Vision 2030, a trade mission is proposed that maintains Saudi Arabia's openness in targeting the development of the transportation and logistics sector, which includes railways, maritime, and highways (International Trade Administration, 2023).

The Haramain Train is under construction, which is expected to facilitate tourist mobilization by connecting Jeddah, Mecca, Rabigh, and Medina. Construction of a railway connecting Yanbu, Jeddah, Rabigh, Gizan, Al-Taaf, and Khamis Mesheet will also be carried out. In air transportation, the government is investing in the expansion of Jeddah Airport considerably, as well as the renewal of Al-Taif Airport, which will also be able to receive large amounts (Mehmood Ul Hassan Khan, 2016, bl 39). The Makkah Metro was also built with completion as quickly as possible to facilitate tourist mobilization. This transportation development investment was made to build Saudi Arabia's robust infrastructure and provide the best service for tourists.

Restaurant

Economic diversification through the tourism industry is also being developed through the restaurant sector, which offers culinary tourism (Aulia, 2023). The increase in the number of visitors in Saudi Arabia has impacted the development of the restaurant sector. By taking advantage of this opportunity, the Saudi Arabian government plans to increase the number of restaurants to provide comfort to visitors and a new taste in traveling in Saudi Arabia, which is no longer focused on religious tourism (Aulia, 2023).

The leading market players operating in the Saudi Arabian food services market are Olayan Food Services Co. (OFS), Alamar Foods Company, Riyadh International Catering Corporation, Kudu Company for Food and Catering, ELBAIK Food Systems Company S.A., Herfy Food Services Co. JSC, Mawarid Food Company Ltd., Shawaya House Restaurants company, and Tanmiah Food Company (Sharma, 2023). The number of available restaurants is increasing in large numbers, including the emergence of fast-food restaurants such as Mcd, KFC, and so on.

The food industry in the restaurant sector is a vital part of the economy. In 2018, Saudi Arabia's restaurant sector earned revenues of USD150 million, an increase of 19% over the previous year (Saudi Food Exppo, 2021). In 2021, the restaurant sector earned around USD59 billion, which means an increase of 64% from 2013. This income is followed by the number of food and beverage industry businesses currently numbering more than 52,000 (HoorizoonX, 2022). Most of the business is spread in the Mecca region (25%), Riyadh and the eastern province with 22% and 16%, respectively.

Renewal Of Tourism Types In Saudi Arabia

In renewing tourism types under Saudi Vision 2030, the government targets increasing the number of foreign tourists visiting through the development of new tourists' destinations. Through this renewal, state income from the tourism sector is expected to reach 10%, with the number of foreign tourists getting 100 million tourists (Hotel Management, 2022). Vision 2030 is guiding the government's steps to create attractions and tourists destinations of the highest international standards in Saudi Arabia (Kingdom of Saudi Arabia, 2016). These attractions include the construction of many museums, new historical and tourist sites, and more cultural venues. Vision 2030 forms a program that aims to develop new tourist destinations that can provide an image of advanced, modern Saudi Arabia. Therefore, a new mega-tourist pillar in this development was formed to create a new tourist destination that is magnificent, attractive, and unique to encourage Saudi Arabia as a global tourist destination. Meanwhile, rich cultural heritage sites and iconic sites is pillar implemented to increase the cultural and historical value of Saudi Arabia through the renewal of

tourist destinations (Sana N. Khan, 2020). It aims to preserve the cultural heritage and iconic sites that are important to Saudi Arabia's identity and values.

Adventure Tourism

NEOM is the most ambitious project in Saudi Arabia. With a construction cost of USD500 billion, the NEOM proposal envisions building a futuristic city in the desert near the border with Jordan and across Egypt's Gulf of Aqaba (Daye, 2019, bl 100). This project is the most prominent tourist destination developed by Saudi Arabia to create a sustainable future tourist destination as an economic and technological area. As a great tourist attraction, NEOM offers various experiences, from futuristic city life to stunning natural beauty (Saudi Arabia Government, 2021c). This is provided through a futuristic area with 100% renewable energy that prioritizes people and nature, creating a new sustainable life, work, and prosperity model.

Based on its development, NEOM is the main object that houses THE LINE, Oxagon, Trojena, and Sindalah (Saudi Arabia Government, 2021c). THE LINE is part of the NEOM project, which is a depiction of urban life in the future. Oxagon is an area under the NEOM project that is the center of an advanced and clean industrial ecosystem with an industry 4.0 approach and circularity principles. Trojena is part of the NEOM region, located 50 km from the Gulf of Aqaba Beach, with an altitude of 1,500m to 2,600m and covers an area of 60 square kilometers. Sindalah is where natural beauty meets responsible design, advanced technology, and inspiring architecture. Objectively, NEOM was built with a design for a human scale that prioritizes life, health, and well-being. This city was created to encourage residents and visitors to explore, innovate, and diversify, introducing a new model of urban sustainability (Saudi Arabia Government, 2021c). NEOM development is conducted in mixed-use communities, research centers, and sports and entertainment venues.

The Red Sea is a tourism development project focusing on developing tourism along the Red Sea Coast. Located along the west coast of Saudi Arabia, this project is said to be home to more than 90 untouched islands offering natural beauty (Saudi Arabia Government, 2023f). It starts with stunning beaches and wonders such as dormant volcanoes, dunes/deserts, and mountain canyons. Its strategic location on the Red Sea has a cultural history with fascinating historical and cultural sites and offers 8,000 rooms in 50 hotels. This project includes Turtle Bay, Ummahat Island, Shura Island, Southern Dunes, Desert Rock, Shebara Island, Red Sea International Airport, and The Red Sea Nursery (Saudi Arabia Government, 2023f).

Amaala is an exclusive tourist destination offering restorative experiences, located along the Red Sea Coast with an area of 4,000 square kilometers. This destination offers exciting activities for all interests, including the sea and sun, sports, arts, and culture. The Amaala development is at the heart of Triple Bay, offering 1,300 rooms across eight hotels (opening in 2024). By 2027, Amaala will have over 3,000 rooms in 25 hotels, 943 luxury residential villas, retail outlet, high-end dining, yacht clubs, and health and recreation facilities (Saudi Arabia Government, 2023).

Qiddiyah is the capital of Saudi Arabia's leading entertainment destination, offering theme parks, performing arts centers, sports venues, and much more. This program under Saudi Vision was launched in 2018, with construction starting in 2019. This area was built to be a center for international sports arenas, concert and entertainment venues, sports and arts academies, horse racing arenas, outdoor and adventure activities, as well as family-friendly amusement parks (including Six Flags Park with the fastest, longest, and highest coasters in the world). Qiddiya was built to make Saudi Arabia a popular destination among world-class destinations (Saudi Arabia Government, 2023).

Cultural Tourism

Diriyah gate is tourist destination that offers restored and redeveloped historical and cultural values through historical and cultural sites, museums, and cultural centers. Diriyah allows visitors to experience the authentic Najdi culture and history that is more than 600 years old through unique heritage experiences, education, and world-class residences (Saudi Arabia Government, 2021).

Located northwest of Riyadh, Diriyah is home to the UNESCO world heritage site AT-Turaif. This beautifully preserved mud brick city is the birthplace of the KSA and the original home of the Al Saud. Combining the traditional Najdi architectural style with modern urbanism provides an emotional experience for visitors to learn about the origins of modern Saudi Arabia and the spiritual values rooted in it (Saudi Arabia Government, 2021).

Alula is an archeological site with cultural offering that Saudi Arabia continues to develop. A living museum containing sandstone outcrops, historic developments, and preserved tombs, AlUla is home to endless cultural treasures listed as Saudi Arabia's first UNESCO World Heritage site (Saudi Arabia Government, 2021). With the city's geography dating back more than 200,00 years, AlUla's still largely unexplored history includes the Nabataean City of Hegra, the Ancient Dadanite and Lihyanite Kingdoms, and the Old City of AlUla. As a cultural heritage, AlUla developed through a museum that is capable of becoming a world destination while preserving this area's natural character and extraordinary (Saudi Arabia Government, 2021).

In honor of the beauty and rich history of Saudi Arabia's Islamic heritage, a project was established to preserve and restore the Kingdom's 130 mosques (Saudi Arabia Government, 2023). Launched in 2018, this program aims to enrich the spiritual journey accompanied by cultural experiences for pilgrims in the Kingdom. This aims to provide the essence of Saudi Arabia's culture, history, and heritage to the world through the restoration of mosque construction.

King Salman Park located in the heart of Riyadh, is the world's largest city park and offers various activities. Wide open green space are used as venues for sporting and cultural events and artistic and recreational activities that provide visitors with a natural feel (Saudi Arabia Government, 2023). This garden was built in various styles, namely an Islamic Garden, a vertical garden, a labyrinth garden, and a bird and butterfly sanctuary. This project also prioritizes sustainable environmental protection, which helps increase green space through vegetation.

The Jeddah Central Project is designed to preserve Jeddah's cultural heritage with a modern design. With four essential landmarks (opera house, museum, sports stadium, and oceanarium), marina, beach resort, café, mall, and modern residences, this project costs USD19.9 billion (Saudi Arabia Government, 2023). In 2027, 45% of the development (opera house, stadium, and oceanarium) will be completed, and 36% will be completed in 2030, focusing on dynamic economic, cultural, and entertainment centers (Saudi Arabia Government, 2023).

4. Conclusion

Research on the implementation of Saudi Vision 2030 towards the Saudi Arabian Tourism industry presents an update on previous research, where the author sees a gap in revealing the new steps to push Saudi Arabia to become a global tourist destination. Therefore, through qualitative research methods, the researcher tries to reveal the implementation of developing tourism in Saudi Arabia under Vision 2030. The results of this research reveal that the implementation was accomplished through developing the tourism components and renewal types of tourism to not rely on religious tourism, namely cultural tourism and adventure tourism.

In developing the tourism industry sector, the government increases economic viability, creates jobs, and supports cultural and environmental aspects. To support that increase, the government deleted the old regulations and made new policies that relaxed the activities while building economic diversification. This can be seen in investment regulations, where everyone can give a hand and impact Saudi Arabian tourism. This investment in the tourism industry aims to develop the components of tourism like hotels, transportations, restaurants, and building new destination.

Therefore, based on the conclusions stated, with this holistic approach, Saudi Arabians have thoughtfully developed the tourism sector massively. It is known for the development of hotels, transportation, and restaurants to fulfill the components of tourism with international standards and the building of new destinations, which are new types of tourism in Saudi Arabia, such as Qiddiya, Amaala, AlUla, Jeddah Central Park, King Salman Park, Historic Mosque, Diriyah Gate, The Red Sea, and NEOM. His project will finish in 2030 and targeted to earn 10% of revenue for GDP.

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