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Tourists' Awareness and Perceptions of Saudi Arabia's Tourism Initiatives: A Percentage-Analysis Perspective on Domestic and International Stakeholders

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ABSTRACT

This study employs percentage analysis to compare how domestic and international tourists perceive Saudi Arabia's recent tourism initiatives under Vision 2030. Drawing on survey data from 231 domestic and 207 international respondents, we calculate and interpret the relative frequency of key variables—demographics, campaign awareness, travel intentions, and socio-cultural attitudes. Domestic participants display markedly higher awareness of government efforts such as Saudi Seasons (90.9 %) and Giga Projects (92.6 %), whereas international respondents exhibit moderate familiarity, with the Al Haramain high-speed rail (57.5 %) topping their list. Only one-third of foreigners (33.3 %) would currently shortlist Saudi Arabia for an upcoming trip, in contrast to strong latent interest among nationals. We discuss how these percentage gaps illuminate the effectiveness—and the limits—of high-budget branding, infrastructure upgrades, and social-reform messaging. Managerial implications stress segmented communication, culturally adaptive safety signalling, and destination bundling to convert awareness into visitation.

Keywords: percentage analysis; Vision 2030; destination branding; Saudi Arabia; stakeholder perceptions; tourism campaigns.

1. Introduction

Recent reforms in Saudi Arabia—ranging from the e-visa regime to high-profile promotions featuring Lionel Messi—have repositioned the Kingdom from a closed pilgrimage hub to an emerging leisure destination. Vision 2030 frames tourism as a pillar of economic diversification, targeting 150 million annual visits by 2030 (Saudi Tourism Authority, 2024). While many studies deploy multivariate modelling to gauge programme impact, decision-makers still require clear, intuitive metrics. Percentage analysis, the simple expression of category counts as proportions of the sample, offers a direct view of how many people know, like, or intend to do something (Babbie, 2021).

This paper therefore asks: *What do the percentages tell us about stakeholder awareness, attitudes and behavioural intentions toward Saudi Arabia's tourism offerings?* We analyse the Data Analysis chapter of a doctoral thesis that surveyed domestic ($n = 231$) and international ($n = 207$) tourists. By foregrounding percentage distributions, we complement earlier reliability, factor and regression work and generate practitioner-friendly insights.

The remainder proceeds as follows. Section 2 reviews percentage analysis in tourism research and situates the study in Stakeholder Theory. Section 3 details the data and analytic procedure. Section 4 presents results for demographics, campaign awareness, travel readiness and social-reform acceptance. Section 5 discusses theoretical and managerial implications, and Section 6 concludes.

2. Literature Review

2.1 Percentage analysis in tourism studies

Descriptive statistics—particularly percentages—remain a staple for profiling travellers, evaluating campaign recall and benchmarking attitudes (Beerli & Martín, 2004). Percentages translate complex datasets into actionable “how many” questions: How many millennials recall a destination slogan? What proportion feel safe visiting? Such clarity supports tactical decisions (Hair et al., 2019).

2.2 Destination branding and Vision 2030

Brand-building for emerging destinations hinges on communicating unique culture, natural assets and safety (Konecnik & Gartner, 2007). Saudi campaigns like *Saudi Welcome to Arabia* and *This Land Is Calling* aim to normalise leisure travel and offset risk perceptions tied to conservatism (Al-Muhanna, 2023).

2.3 Stakeholder Theory lens

Freeman's Stakeholder Theory posits that destinations create value only when diverse actors—tourists, residents, firms—are heard (Freeman, 1984). Domestic tourists (internal stakeholders) may interpret reforms differently from outsiders (external stakeholders). Percentage gaps thus reveal alignment (or misalignment) across stakeholder groups.

3. Methodology

3.1 Data source

We re-examine the thesis dataset comprising 231 domestic and 207 international respondents collected in 2024. The original study used convenience sampling at airports, malls and online platforms. Reliability alphas exceeded .74 across constructs, confirming internal consistency.

3.2 Analytic approach: percentage analysis

For every categorical item we compute:

$$\text{Percentage} = \frac{\text{Category Frequency}}{\text{Group } n} \times 100$$

We then contrast domestic versus international percentages, flagging ≥ 15 -point gaps as “salient.” While inferential tests are available, our objective is interpretive clarity for managers.

4. Results

4.1 Demographic structure

Domestic tourists skew female (66.7 %) and young (61.5 % aged 25–34). Education is high, with 41.6 % holding PhDs—a reflection of the survey's urban settings. International respondents are gender-balanced (50.7 % female) and dispersed across age bands, though 28.0 % also fall in the 25–34 bracket.

4.2 Awareness of government initiatives

Initiative	Domestic awareness	International awareness
Al Haramain high-speed rail	92.6 %	57.5 %
Saudi Seasons festivals	90.9 %	54.1 %
Vision-driven Giga Projects (NEOM, Red Sea)	92.6 %	45.9 %
<i>Go Beyond What You Think</i> (Messi ad)	64.5 %	54.6 %
Official portal VisitSaudi.com	81.0 %	44.9 %

Domestic awareness exceeds international by 25–47 points on most initiatives, confirming stronger campaign penetration at home.

4.3 Travel intentions

Among foreigners, only 35.7 % plan any international holiday within a year, and just 33.3 % would shortlist Saudi Arabia (with 35.3 % “not sure”). Domestic data show higher latent demand: 83.5 % travelled outside their province in the past year; 90 % intend to revisit a Saudi destination (data not shown for brevity but available in Chapter 4).

4.4 Perception of social reforms

Domestic respondents report very high awareness of social-liberalisation steps: 90 % recognise the lifting of the driving ban for women; 91.8 % note cinema reopenings . International awareness of the same reforms averages 55–60 % .

4.5 Safety and infrastructure cues

Despite high safety scores in regression models, only 42 % of foreigners feel “fully safe” travelling at night (not tabled here). Infrastructure perceptions diverge: 77.9 % of Saudis celebrate the e-visa rollout, whereas 55.1 % of foreigners acknowledge it .

5. Discussion

5.1 Domestic saturation versus international diffusion

The 30-plus-point awareness gap indicates that domestic audiences internalise Vision 2030 messaging rapidly, perhaps through local media saturation and first-hand exposure to projects. Abroad, paid media alone appears insufficient; earned media and word-of-mouth may be vital to push awareness beyond the 50 % mark.

5.2 Risk communication remains pivotal

Regulatory and cultural reforms are widely known at home yet only moderately abroad, fuelling lingering safety hesitation among foreigners. This underscores Fuchs and Reichel’s (2011) risk-perception thesis: without clear, credible safety cues, awareness does not translate into intention.

5.3 Infrastructure as a proof-point

The Al Haramain rail enjoys top recall among foreigners (57.5 %), suggesting that tangible, newsworthy infrastructure signals resonate more than advertising slogans. Highlighting operational milestones (on-time performance, capacity) could further bridge perception gaps.

5.4 Managerial implications

- **Segmented storytelling:** Use region-specific narratives; GCC markets may prefer cultural-heritage bundles, while Western markets need reassurances on norms and logistics.
- **Safety dashboards:** Publish live crime and health metrics to convert the 35 % “not sure” cohort into the “yes” column.
- **Experience packaging:** Pair Giga Projects with UNESCO sites to leverage domestic enthusiasm for heritage and showcase authenticity to outsiders.

6. Conclusion

Percentage analysis provides an unvarnished mirror of stakeholder sentiment. Nine in ten Saudis recognise marquee initiatives, yet only half of foreigners do, and just one-third would currently consider the Kingdom for leisure. Bridging this *awareness-intention gap* demands nuanced, trust-building communication and experiential proof. Future research should track changes longitudinally as projects open and word-of-mouth compounds.

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