

MARKET RESEARCH REPORT

Saudi Arabia

Tourism Market In-Depth Analysis Report

Korea Tourism Organization (KTO) Dubai Office

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Introduction

This report provides a systematic analysis of the Saudi Arabian tourism market to serve as a strategic reference for Korea Tourism Organization (KTO) Dubai Office in developing its Saudi Arabia marketing strategy. The report draws on academic papers, institutional reports, and media coverage, with sources cited for all key data and claims.

Chapter	Title	Key Question
Ch. 1	Country & Economic Overview	What kind of country is Saudi Arabia?
Ch. 2	Vision 2030 & Sports Strategy	How does national strategy impact tourism?
Ch. 3	Giga-Project Status	What are the opportunities and risks for tourism infrastructure?
Ch. 4	Outbound Market Structure	How do Saudi travelers travel?
Ch. 5	Korea-Bound Demand Analysis	Where does demand for Korea come from?
Ch. 6	Travel Trade Trends	How does the travel trade view Korea?
Ch. 7	2026 Middle East Conflict Impact	How does the conflict affect the tourism market?
Ch. 8	KTO Strategic Direction	How should KTO respond?

Background & My Problem Statement

Saudi Arabia is KTO Dubai Office's core market and has been designated as the top priority for 2026, with marketing efforts to be concentrated across B2B roadshows, travel agency training, and media partnerships. The outbreak of the Middle East conflict in February 2026 has sharply contracted inbound demand in the UAE market, making the strategic case for focusing on Saudi Arabia — a market with comparatively resilient outbound potential — even stronger.

With a full slate of Saudi market events and projects set to ramp up in the second half of the year, this report was prepared to address two simultaneous priorities: responding to the immediate crisis and positioning KTO Dubai Office to capture the recovery once the conflict subsides. Drawing on two years of direct experience operating the Saudi promotional office and the market research accumulated during that time, this report integrates relevant academic papers and media coverage to serve as a strategic foundation for KTO Dubai Office's Saudi Arabia approach.

Chapter 1. Saudi Arabia: Country & Economic Overview

1.1 Geography & Demographics

Saudi Arabia is the largest country in the Middle East, occupying approximately 80% of the Arabian Peninsula with a total area of 2,149,690 km². It shares borders with seven countries — Iraq, Jordan, Kuwait, Oman, Qatar, UAE, and Yemen — and is strategically located between the Persian Gulf and the Red Sea. As the birthplace of Islam and home to Mecca and Medina, the country attracts tens of millions of religious tourists annually (KTO Dubai, 2024; CIA World Factbook, 2024).

<p>35.3M</p> <p>Total Population (2025)</p> <p><i>Nationals 63% / Expats 37%</i></p>	<p>63%+</p> <p>Under 35 Years Old</p> <p><i>Median age approx. early 30s</i></p>	<p>57 : 43</p> <p>Male to Female Ratio</p> <p><i>Influenced by expat labor force</i></p>
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The exceptionally young population structure — with over half under 35 — means the MZ generation (Millennials & Gen Z), who are digitally native and receptive to K-content, forms the core of travel decision-making. According to Madkhali et al. (2024), the outbound travel motivations of young Saudis are driven by a complex mix of escaping socio-cultural constraints, global experience-seeking, and leisure.

Major City	Population	Key Characteristics
Riyadh (Capital)	7.7M	Political & economic hub, key B2B partners concentrated
Jeddah	4.9M	Largest commercial city, gateway to the Red Sea
Mecca	2.1M	Holiest site in Islam, major Hajj pilgrimage destination
Medina	1.6M	Islamic holy city, Umrah tourism hub
Dammam / Al Khobar	2.0M	Eastern Province oil industry center

Source: KTO Dubai (2025); Saudi General Authority for Statistics, 2024

1.2 Economic Structure & Key Indicators

Saudi Arabia is one of the world's largest oil reserve holders, with the oil and gas sector accounting for approximately 40% of GDP and 75% of fiscal revenue (Wikipedia, Saudi Vision 2030, 2024). However, since Vision 2030 was launched, growth in the non-oil sector has become increasingly visible. In 2024, real GDP grew by 1.3%, while the non-oil sector expanded by 4.6%, demonstrating measurable progress in economic diversification (KTO Dubai, 2025).

<p>10.5%</p> <p>Tourism GDP Contribution (2024)</p> <p><i>More than tripled from 3% in 2019</i></p>	<p>+4.6%</p> <p>Non-Oil Sector Growth</p> <p><i>2024 basis (KTO Dubai, 2025)</i></p>	<p>SAR 103.84B</p> <p>Outbound Tourism Expenditure</p> <p><i>+16.94% YoY (Arab News, 2025)</i></p>
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Average Household Expenditure Reference (KTO Dubai, 2024)

\$ Annual average USD 44,280 (USD 45,750 for couples with children)
 Indicates high spending potential for family-oriented Korea travel packages

1.3 Political Structure & Business Implications

Saudi Arabia operates as an absolute monarchy. While King Salman bin Abdulaziz Al Saud holds the position of head of state and prime minister, de facto governance is led by Crown Prince Mohammed bin Salman (MBS) (KTO Dubai, 2024). MBS has departed from the traditional consensus-based politics of the House of Saud, consolidating decision-making authority. This vertical power structure has direct implications for partnership negotiation strategies.

Key Considerations for Partnership Negotiations

- Vertical decision-making — agreements with working-level staff may not translate into final decisions
- Wasta (relationship/connections)-based trust building precedes formal contracts
- First meetings: prioritize relationship building over operational discussion
- Business hours: Sun–Thu 08:00–16:00; weekend is Fri–Sat
- Ramadan: shortened working hours — schedule key negotiations before or after Ramadan

1.4 Aviation Infrastructure

Saudi Arabia has emerged as a major aviation hub in the Middle East. In 2023, annual flights reached 815,000 and passenger volume hit 112 million — growth of 135% and 203% respectively from the pandemic low in 2020 (KTO Dubai, 2024). By 2024, the combined passenger handling capacity of the three major international airports exceeded 130 million (KTO Dubai, 2025).

Year	Flights	Change	Passengers	Change
2020	347K	-54%	37M	-64%
2021	497K	+43%	49M	+32%
2022	701K	+41%	88M	+80%
2023	815K	+16%	112M	+26%

Source: KTO Dubai (2024)

1.5 Social Media & Media Landscape

Saudi Arabia is the largest media market in the MENA region, holding approximately 30% market share. Given that over 63% of the population is under 35, social media functions as the primary channel for travel information and consumer decision-making (KTO Dubai, 2024). WhatsApp leads at 87.4%, followed by Instagram (78.1%), Twitter/X (71.9%), Snapchat (68.8%), and TikTok (63.6%).

Social Media Platform Usage Rate (2022 basis, KTO Dubai 2024)



CITC Advertising Regulations (Required Check Before Marketing Execution)

- Non-Saudi influencers are prohibited from posting commercial content without a license
- Saudi companies cannot contract with unlicensed foreign advertisers or influencers
- KTO campaigns must be executed through locally certified partner agencies

Chapter 2. Vision 2030 & Sports Strategy

2.1 Vision 2030 Core Objectives & Tourism Progress

Vision 2030 is a national transformation roadmap announced by MBS in 2016, aimed at diversifying the economy away from oil by fostering tourism, entertainment, finance, and technology as core growth engines (Baker Institute, 2025). Saudi Arabia has been significantly ahead of schedule in achieving its targets.

Indicator	Vision 2030 Target	2024 Actual	Assessment
Annual Tourists	150M	116M	77% of target — exceeded annual goal 2 years running
Tourism Contribution GDP	10%	10.5%	Target exceeded (Arab News, 2025)
Non-Religious Tourism Share	Expand	59% (44% in 2019)	+15%p increase (Arab News, 2025)
Tourism Jobs	Expand	2.2M+	Per WTTC (2024)

Key Implications for KTO

- Growing non-religious tourism share = expanding leisure, shopping, MICE & medical segments KTO should target
- Baker Institute (2025) warns of gap between giga-project-focused visible achievements and actual structural economic transformation
- Avoid overstating expectations in partnership proposals

2.2 Sports as Soft Power Strategy

Saudi Arabia has been aggressively expanding global sports investments through the Public Investment Fund (PIF) — a sovereign wealth fund directly overseen by MBS with assets exceeding USD 700 billion. Major moves include acquiring Newcastle United in the English Premier League, recruiting global stars (e.g. Ronaldo) to the Saudi Pro League, launching the LIV Golf league, and sponsoring F1, boxing and esports (CNN, 2024). This strategy has drawn international criticism as "sportswashing," with MBS himself stating in 2023: "I don't care about sportswashing — if it raises my GDP by 1%."

2.3 Major Sports & Events Pipeline

Saudi Arabia Major Events Pipeline 2026–2034

시기	이벤트	내용 및 KTO 시사점
2026	Esports World Cup	Riyadh — annual fixture targeting global MZ generation

2027	AFC Asian Cup	Saudi Arabia sole host — Asia's largest football tournament
2029	Asian Winter Games	NEOM Trojena (schedule subject to change)
2030	World Expo	Riyadh — major global MICE demand concentration
2034	FIFA World Cup	Confirmed sole host (FIFA, Dec 2024) — 48 nations
2034	Asian Games	Riyadh — same year as World Cup

Source: FIFA (2024); AGSI (2025); Agoda (2025)

KTO Strategic Opportunity Points



- AFC Asian Cup (2027) → Link Korea tourism promotion to Asian football fans
- FIFA World Cup (2034) → Develop pre/post-tournament Korea travel packages for visitors
- Cultural exchange programs with institutions like Diriyah Gate Development Authority

Chapter 3. Giga-Projects & Tourism Infrastructure

Saudi Arabia's giga-projects are not merely construction initiatives — they are variables that fundamentally reshape the nature of tourism demand. However, many projects had already been experiencing scale reductions and schedule delays prior to the conflict, and the 2026 Middle East conflict has caused further disruption through sharp FDI (Foreign Direct Investment) declines and Western contractor withdrawals (Baker Institute, 2025; Seoul Economic Daily, 2026).

<p>□ NEOM / THE LINE Investment: approx. USD 500B THE LINE: 170km linear city 97% scaled down (3M → 300K residents) Construction halted due to supply chain disruption ⚠️ Avoid inflated expectations</p>	<p>□ Diriyah Gate UNESCO World Heritage Site redevelopment Phased opening as culture-tourism complex Translating Saudi history into tourism content Potential collaboration point with Korean traditional culture ✓ DGDA executive attended KTO event</p>	<p>□ Red Sea & Qiddiya Red Sea: eco-luxury resort development Target: 1M international tourists annually Qiddiya: large-scale entertainment complex Potential for K-pop/Hallyu content collaboration ⚠️ Development delays due to conflict</p>
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Project	Current Status	KTO Opportunity	Risk
NEOM / THE LINE	97% scaled down, construction halted	Long-term smart city tourism linkage	Timeline uncertain due to conflict & supply chain
Diriyah Gate	Phased opening underway	Most realistic cultural exchange collaboration	None
Red Sea Project	Luxury resort development ongoing	HNWI segment linkage possible	Western contractor withdrawal risk
Qiddiya	Under construction	K-content collaboration potential	Opening timeline unconfirmed
FIFA Infrastructure	Stadium construction underway	2034 visitor attraction linkage	Ongoing worker migrant rights controversy

Source: Baker Institute (2025); The Middle East Insider (2026); Business Upturn (2026); KTO Dubai (2024)

Chapter 4. Saudi Outbound Tourism Market Structure

4.1 Outbound Volume & Trends

<h1>31.97M</h1> <p>Overseas Stays in 2024 <i>World Data Info (2024)</i></p>	<h1>SAR 103.84B</h1> <p>Outbound Tourism Expenditure <i>+16.94% YoY (Arab News, 2025)</i></p>	<h1>USD 25.5B</h1> <p>2027 Market Size Forecast <i>Renub Research (2024)</i></p>
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Year	Outbound Tourists	Notes
2019	19.01M	Pre-pandemic peak
2020	4.84M	Pandemic plunge (-75%)
2021	8.42M	Recovery begins (+74%)
2022	16.88M	Rapid recovery (+100%)
2024	31.97M trips (incl. overnight)	Record high

Source: KTO Dubai (2024); World Data Info (2024)

4.2 Seasonality

Period	Travel Demand	Characteristics & KTO Strategy Points
Late June – Early September	Peak season (41%)	Escape from extreme heat — opportunity to position Korea as summer retreat
April – June	2nd peak (27%)	Includes Eid Al-Fitr holiday — short-haul package demand surge
January – March	3rd (17%)	Eid Al-Adha and other short holidays
October – December	Off-peak (15%)	Relatively low demand — promotional strategy needed
Ramadan Period	Off-peak	Sharp drop in outbound travel — avoid major marketing/negotiations

Source: KTO Dubai (2024)

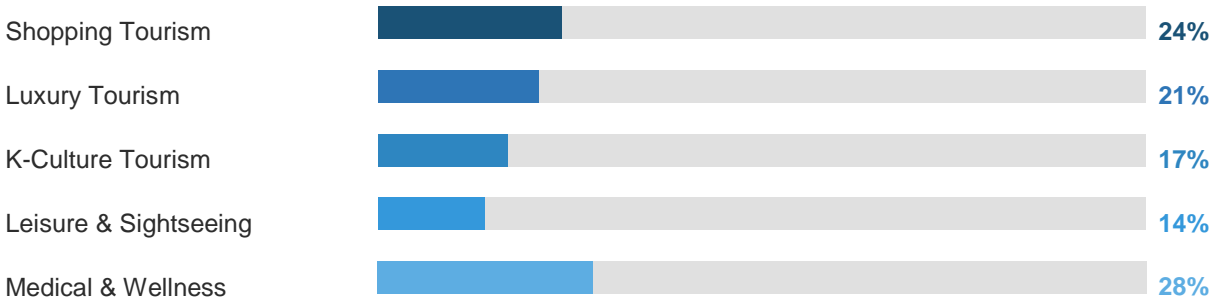
4.3 Travel Behavior & Accommodation Preferences

<p>➔ Travel Behavior</p> <p>Once a year: 64% / Twice: 25%</p> <p>Average stay: 7.8 nights (2024)</p>	<p>☐ Accommodation Preferences</p> <p>Hotel 90% / Aparthotel 6%</p> <p>5-star 51% / 4-star 36%</p>
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Korea visits: 46% prefer 10–14 nights Travel companions: Family 51% / Friends 25% Source: KTO Dubai (2024, 2025)	Clear preference for luxury accommodation Booking window: avg. 15.8 days in advance Source: KTO Dubai (2024)
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4.4 Travel Motivations & Key Consumer Segments

Primary Motivation for Korea Travel — Based on Travel Trade Survey (KTO Dubai, 2025)



Source: KTO Dubai (2025); Madkhali et al. (2024)

<p>★ MZ Generation (15–35)</p> <p>Over 60% of total population Core K-drama, K-pop & K-food fanbase Travel info sourced via social media Prefer online booking → #1 target for digital B2C marketing Basis: Tandfonline (2025)</p>	<p>★ High Net Worth Individuals</p> <p>~300K individuals with assets \$1M+ (2022) Korea medical tourism (cosmetic, skin, oriental medicine) Luxury shopping & 5-star accommodation VIP bespoke package demand → Key target for premium Korea products Basis: KTO Dubai (2024)</p>	<p>★ Family Travelers</p> <p>Largest outbound travel segment 31% of travel agency bookings Halal food access is non-negotiable Prayer spaces & family-friendly attractions essential → Halal infrastructure info provision is key Basis: KTO Dubai (2024)</p>
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Chapter 5. Korea-Bound Demand Analysis

5.1 Saudi Visitors to Korea: Volume & Trends

17,349 Saudi Visitors to Korea (2023) <i>+22.5% vs pre-pandemic 2019</i>	96% Positive Perception Post-Visit <i>99% would recommend Korea to others</i>	79.3% Agents Reporting Demand Increase (2025) <i>0% reporting decline</i>
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Year	Saudi Visitors to Korea	Change
2019	14,158	Pre-pandemic benchmark
2020–2022	Sharp decline, then recovery	Pandemic impact
2023	17,349	+22.5% vs 2019

Source: KTO Dubai (2024)

5.2 Air Connectivity

Saudia Airlines: Launch & Withdrawal Timeline

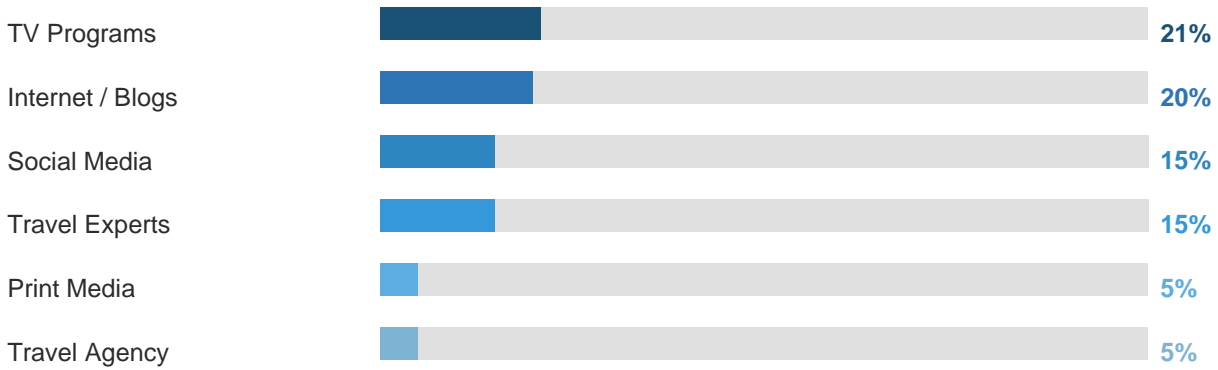
- ✈ August 16, 2022: Riyadh–Seoul direct route launched (3 flights/week)
- ✈ After launch: market share surged to 44.36% — largest Korea-bound carrier
- ✈ June 22, 2024: Service suspended due to profitability issues
- ✈ Post-withdrawal: KE–Saudia codeshare maintained for indirect sales

Airline	Hub	Weekly Flights	Weekly Seats	Status
Emirates (EK)	Dubai (DXB)	14	5,369	Operating
Etihad Airways (EY)	Abu Dhabi (AUH)	10	2,930	Operating
Qatar Airways (QR)	Doha (DOH)	7	2,289	Operating
Korean Air (codeshare)	Via Saudia codeshare	—	—	Indirect sales
Total	—	31 flights	10,588 seats	Partial disruption due to conflict

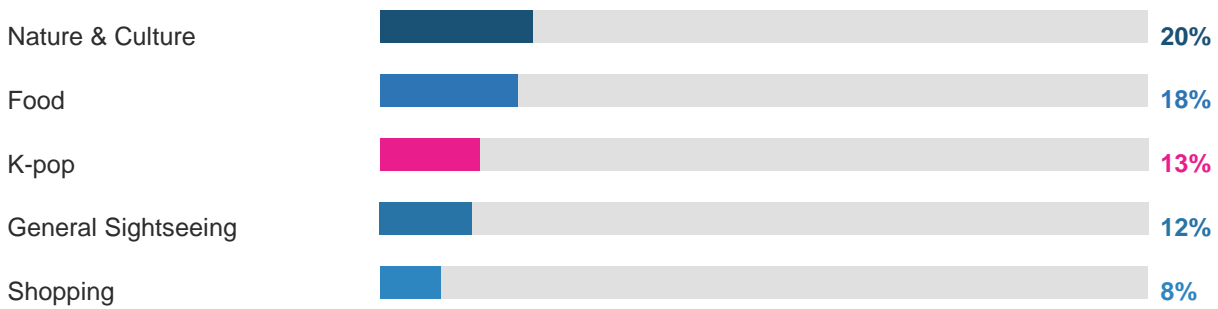
Source: KTO Dubai (2024); GCC hub operations partially affected by 2026 conflict

5.3 Travel Motivations & Behavior

Motivations for Visiting Korea — Among Korea Visitors (KTO Dubai, 2024)



Top Activities While in Korea (KTO Dubai, 2024)



5.4 Muslim-Friendly Environment: Current Status & Challenges

88% of Korea Visitors Experienced Difficulty Finding Halal Food (KTO Dubai, 2024)
 Han et al. (2019, Tourism Management): Core Muslim-friendly destination attributes ranked as:
 Halal food availability > Prayer facilities > Local attitudes > Service quality
 A structural paradox exists: high satisfaction (96% positive) yet inadequate halal infrastructure

Current Limitations in Korea	KTO Current Initiatives & Improvement Direction
Halal restaurants concentrated in Itaewon (Seoul) & Haeundae (Busan) Prayer rooms limited to Incheon Airport & major shopping malls Resistance to halal tourism in some local communities (Marlinda et al., 2023) Gap between official certification and on-ground reality	Muslim-friendly destination certification program in operation Halal app & website provided (Marlinda, 2023) Expanding Arabic-language halal restaurant info Prayer space info sharing with travel agencies → Infrastructure improvement will amplify repeat visits & word-of-mouth

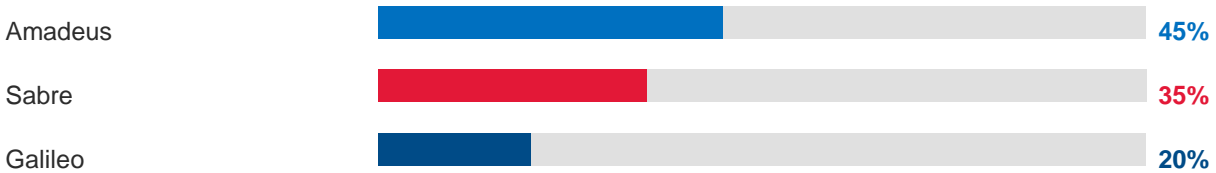
Chapter 6. Travel Trade Trends

6.1 Saudi Travel Trade Structure

Region	Key Cities	IATA Accredited Agencies
Western Province	Jeddah, Mecca, Medina	260+
Central Province	Riyadh, Al Qassim	200+
Eastern Province	Dammam, Al Khobar, Dhahran	180+

Source: KTO Dubai (2025)

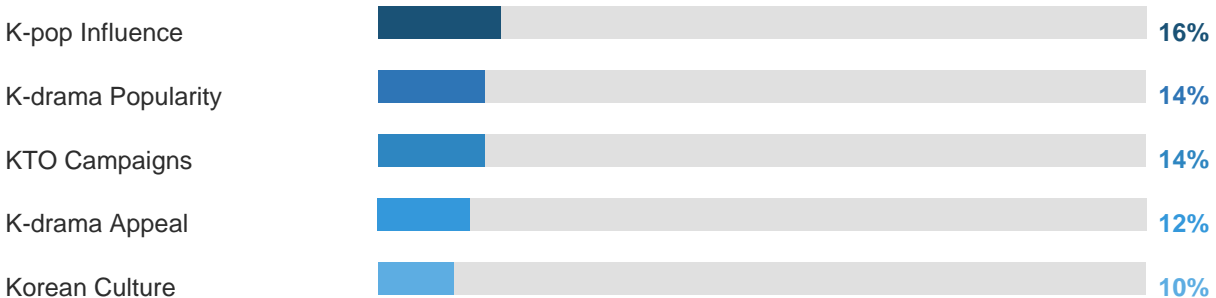
GDS Market Share (KTO Dubai, 2025)



6.2 Korea Sales Performance (2025 Basis)

<p>100% Agencies Selling Korea <i>All 60 surveyed agencies (KTO Dubai, 2025)</i></p>	<p>75.9% Rate Korea as 'Important' <i>24.1% rate it 'Moderately Important'</i></p>	<p>79.3% Reporting Demand Growth in 2025 <i>0% reporting decline (KTO Dubai, 2025)</i></p>
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Korea Demand Drivers — Travel Agent Responses (KTO Dubai, 2025)

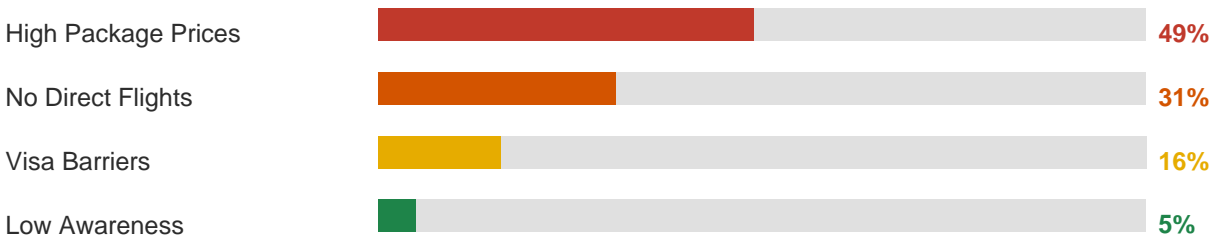


Sales Pattern	Share	Implication
Seoul Only	67%	Seoul-heavy → opportunity to diversify to Busan & Jeju
Korea + Japan Combo	30%	Combined packages with Japan already mainstream
Including Jeju	22%	Reflects nature tourism demand
Including Busan	11%	Market with growth potential

Source: KTO Dubai (2024)

6.3 Industry Challenges & Support Requests

Major Barriers to Selling Korea (KTO Dubai, 2025)



★ Travel Agency Support Requests	★ Booking Channel Preferences
<ul style="list-style-type: none"> Halal restaurant & prayer space info in Arabic WhatsApp PDF format marketing toolkit FAM trip operations Korea Specialist certification program Joint promotional package development <p>Source: KTO Dubai (2025)</p>	<ul style="list-style-type: none"> DMC + B2B platforms: 61% DMC + direct hotels: 22% All channels: 17% <p>Itinerary delivery: WhatsApp PDF 84.5%</p> <p>Source: KTO Dubai (2025)</p>

Chapter 7. The 2026 Middle East Conflict & Tourism Market Shock

7.1 Conflict Timeline & Current Status

Key Timeline of the 2026 Middle East Conflict

시기	이벤트	내용 및 KTO 시사점
Late Feb 2026	US–Israel Strikes on Iran	Iran's IRGC Supreme Commander killed
Mar 1, 2026~	Iranian Retaliation	Ballistic missile & drone attacks across GCC
Mar 7, 2026	Dubai Airport Incident	Drone strike causes temporary DXB shutdown (OPSGROUP, 2026)
Early Mar 2026	12,000+ Flights Cancelled	Aviation chaos across the Middle East (AFAR, 2026)
Mid Mar 2026	14-Day Ceasefire Agreed	Temporary US–Iran ceasefire reached
Apr 24, 2026	EASA Advisory Active	Advisory to avoid Middle East airspace remains valid (OPSGROUP, 2026)

7.2 Aviation & Tourism Shock

<p>12,000+ Flights Cancelled <i>Across Middle East (AFAR, 2026)</i></p>	<p>-45% Saudi Hotel Bookings Plunged <i>March 2026 (Middle East Insider)</i></p>	<p>-11–27% Middle East Visitor Decline Forecast <i>Tourism Economics analysis</i></p>
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<p>\$34–56B Estimated Tourism Revenue Loss <i>Oxford Economics (Hosp. Investor, 2026)</i></p>	<p>\$10B+ Vision 2030 Cumulative Losses <i>WSJ via Seoul Economic Daily, 2026</i></p>	<p>-60–70% FDI Inflow Decline Forecast <i>Q1 2026 (Middle East Insider, 2026)</i></p>
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7.3 Impact on Vision 2030 & Giga-Projects

Scenario	Duration	Impact on Vision 2030	Probability
Short War	1–3 months	Temporary halt of core projects, FDI decline	Currently unfolding
Mid-length War	2–6 months	Lower-priority projects delayed/scaled back; PIF fills FDI gap	High
Prolonged War	6+ months	Most projects suspended, defense spending spikes, structural reform delayed	Low

Source: *The Middle East Insider* (2026); *Arabian Business* (2026)

Note on key terms: FDI (Foreign Direct Investment) refers to capital invested directly into Saudi projects by foreign companies and institutions — a core pillar of Vision 2030 financing. PIF (Public Investment Fund) is Saudi Arabia's sovereign wealth fund, directly overseen by MBS, which acts as the primary domestic investor in giga-projects and substitutes for FDI when foreign capital declines.

<p>⚠ Immediate Damage</p> <p>NEOM: maritime insurance up 300%, construction halted</p> <p>Western contractors & consulting firms withdrawing</p> <p>5,000+ American employees departed or preparing to leave</p> <p>Oil exports halved due to Strait of Hormuz disruption</p> <p>Source: <i>The Middle East Insider</i> (2026)</p>	<p>✔ What Remains Intact</p> <p>FIFA World Cup 2034: no cancellation</p> <p>Vision 2030 long-term direction maintained</p> <p>MBS neutral diplomacy avoids direct confrontation</p> <p>Domestic tourism activated to offset international decline</p> <p>Post-conflict rebound potential remains</p> <p>Source: <i>Arabian Business</i> (2026)</p>
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<p>★ Alternative Destination Demand Emerging Among Saudi Travelers</p> <p>Preference for safe, geographically distant destinations growing during the conflict</p> <p>TravelDailyNews Asia (2026): confirmed destination-switching demand emerging</p> <p>Korea's geographic distance from the conflict zone → opportunity to position as a safe travel destination</p> <p>Digital marketing preparation for post-conflict recovery period must begin now</p>
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Chapter 8. KTO Dubai Office: Strategic Implications & Response Direction

Phase	Core Objectives	Action Plans	Expected Outcomes
Short-Term (H1 2026)	Aviation instability response Safe destination positioning	Real-time monitoring of GCC hub operations Strengthened travel agency communication Korea safety-focused digital marketing Arabic SNS content push	Capture post-conflict recovery demand Attract destination-switching travelers
Mid-Term (Post-stabilization)	Capture recovery period Strengthen trade capacity	FAM trip reactivation Korea Specialist certification program Joint promotional campaign preparation Arabic halal infrastructure content update	Enhanced Korea sales capability in trade Diversified package offerings
Long-Term (2027–2034)	Sports event linkage Deepen B2B partnerships	AFC/FIFA World Cup-linked Korea packages Diriyah Gate cultural cooperation Saudia/flynas direct flight joint marketing HNWI medical tourism VIP packages	Sustained Korea visitor growth High-value market development

Source: KTO Dubai (2024, 2025); Arabian Business (2026); TravelDailyNews Asia (2026)

➡ My Strategic Assessment & Recommendations

The most important insight from the data in this report is that Saudi demand for Korea travel has been growing steadily — even without a direct flight. This tells us that demand is being driven not by infrastructure, but by the cultural appeal and content Korea offers. Put differently, the structural potential for this market to expand rapidly already exists; it is simply waiting for a direct flight to unlock it.

The ultimate goal of KTO Dubai Office's Saudi strategy should therefore not be simply increasing visitor numbers, but building a virtuous cycle: accumulating demand → restoring direct flights → achieving market breakthrough. Every marketing initiative should be designed with this larger picture in mind.

The current situation — with the UAE market contracting due to the 2026 conflict — is a crisis, but it is also the moment that makes the case for concentrated investment in Saudi Arabia. Even after the conflict ends, a full recovery of the UAE market will take considerable time. This is the moment for a strategic shift at the office level: Saudi Arabia must fill that gap.

In the medium to long term, Saudi Arabia is more than an outbound tourism market — it is a market where Korea can build genuine strategic partnerships. The global sports event pipeline (AFC Asian Cup 2027, FIFA World Cup 2034), the potential for MICE collaboration with major state enterprises including Aramco, and cultural exchange channels through institutions like the Diriyah Gate Development Authority are all strategic touchpoints worth investing in now, even if returns are not immediate.

Saudi Arabia does not move fast. Given its relationship-based business culture, vertical decision-making structures, and long negotiation cycles, the seeds planted today will bear fruit two to three years from now. Now is exactly the right time to plant them.

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