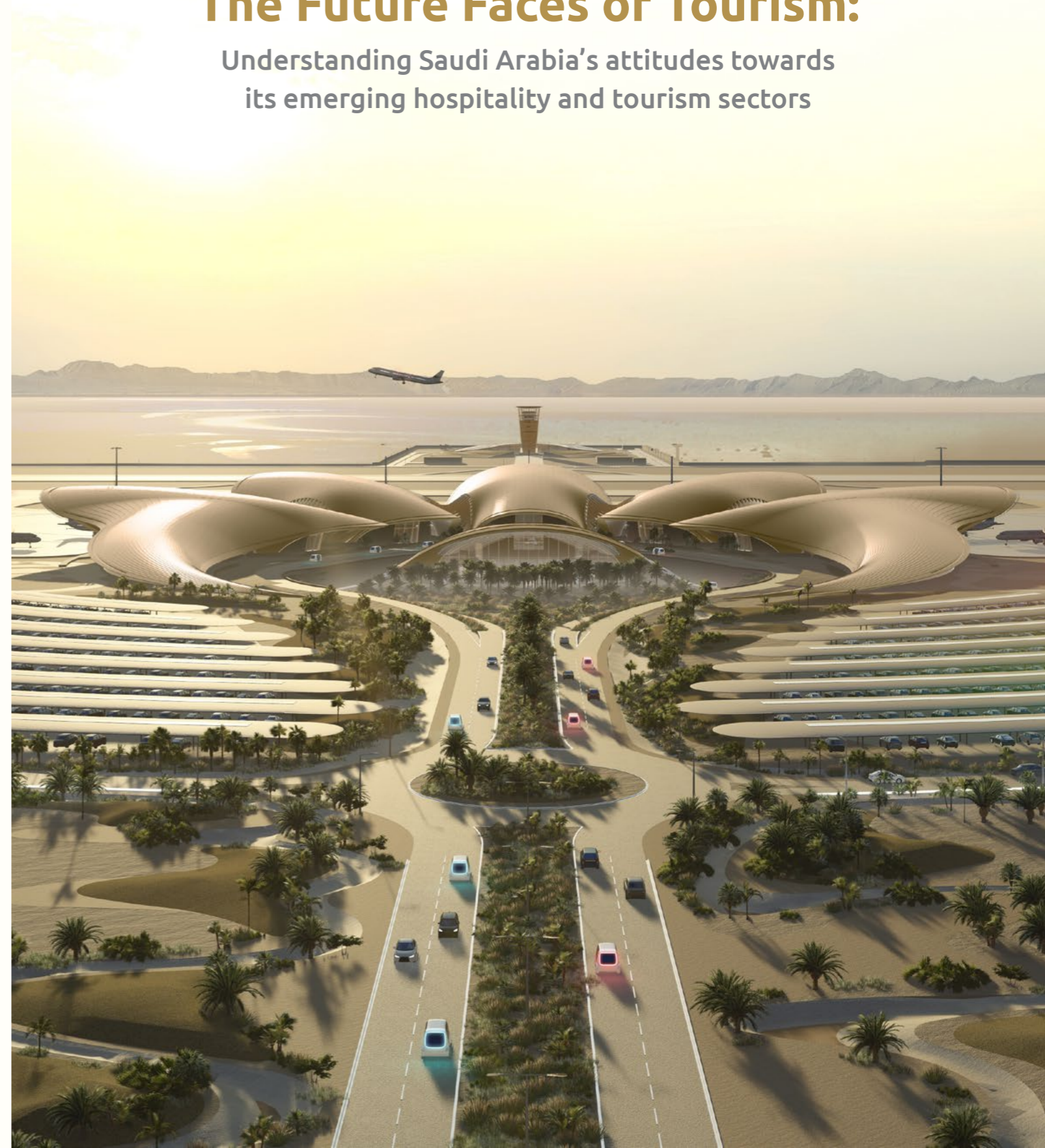


## The Future Faces of Tourism:

Understanding Saudi Arabia's attitudes towards  
its emerging hospitality and tourism sectors



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## **The Future Faces of Tourism**

Understanding Saudi Arabia's attitudes towards its  
emerging hospitality and tourism sectors



John Pagano  
Chief Executive Officer

# John Pagano

## Chief Executive Officer

The Red Sea Development Company

I first came to Saudi Arabia in 2017 when I recognized the nation was going through an incredible transformation, and one that continues today. I believed then, as I do now, that the Kingdom offers a wide range of exciting opportunities that remain unmatched by any market in the world.

Tourism is a strategic growth industry for Saudi Arabia and a significant contributor to helping realize its wider Vision 2030 strategic goals. It is a creator of jobs, a driver of economic growth and an essential bridge between cultures that fosters a greater understanding and appreciation of this unique and intriguing nation. At The Red Sea Development Company, we have a long-term vision for our role in the sector.

The Red Sea Project is the only giga project focused solely on tourism and therefore, a significant contributor to realizing the nation's bold aspirations. It is one of the most exciting and ambitious tourism developments in the world and is truly unique in the diverse constellation of experiences it offers.

Positioned on Saudi Arabia's Red Sea coast, the destination covers 28,000 square kilometers with visitors able to experience a vast

array of immersive experiences. It encompasses diverse natural wonders enhanced by world class amenities. I am confident that this exceptional offering will prove attractive to travelers worldwide but in order to avoid over-tourism, we will carefully manage the annual number of visitors which will be capped at one million.

To accommodate this rise in visitors and variety of experiences, thousands of jobs will be created for Saudi citizens in almost every discipline imaginable. The diversity of the destination's offering will be matched by an array of opportunities.

Whether it's sustainability, hospitality, engineering, finance, management or HR, there will be a wealth of options for men and women to create the career path of their choice.

Despite significant interest shown by visitors over the past 18 months, it is a destination that is relatively undiscovered by the international community. We are hoping to change that and place the Kingdom firmly on the global tourism map. We believe our compelling offering will excite and entice visitors with something truly unique.

However, developing the destination is only part of the challenge. The

tourism industry accounts for one in ten jobs worldwide and has a near insatiable demand for people with the skills and capabilities to manage world-class destinations. I am therefore delighted and encouraged that this report reinforces what I had presumed all along - that young Saudis are excited about opening up their wonderful country to the world and want to be part of something special, by forging successful careers in tourism and hospitality.

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***"It is one of the most exciting and ambitious tourism developments in the world and is truly unique in the diverse constellation of experiences it offers."***

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# Ahmad Darwish

## Chief of Staff

The Red Sea Development Company

This is an exciting time for our business and for our country. I am proud to be part of an organization that is creating a destination that will bring together luxury, culture and sustainability in one of the world's last natural hidden treasures on The Red Sea in Saudi Arabia.

I am passionate about leading our community engagement efforts which will uplift the lives of those living in close proximity to the destination. I believe this positive impact, which we are already making, will be our lasting legacy.

However, this can only be achieved through our people who will be at the very heart of helping us develop the destination, making it job generating destination for generations to come.

The work is already well underway with in excess of 5.3 billion SAR worth of international and local contracts already awarded to build the essential infrastructure and first phase of the destination. However, construction is just the beginning of this. While developing the destination is our job, our business is growth. Growth for the Saudi economy. Growth for the Saudi people.

It is why we are placing special attention on ensuring our destination works for local

communities and for all Saudis. We want The Red Sea Project to be a source of employment, training and opportunity for people across the country, long into the future. We are working to bolster the country's burgeoning hospitality industry and facilitate the growth of new industries such as construction and engineering that will provide the jobs of the future.

However, good intentions and bold ambitions on their own are not enough. They need to be matched by the enthusiasm of the Saudi population - particularly young Saudis who represent the future of our country. The results from the Future Faces of Tourism research give reason to be hugely positive with tourism and hospitality among the top careers that appeal to young Saudis, while around nine in ten think a career in tourism and hospitality provides them with good opportunities.

Through the growth of our tourism sector, we will be opening our country up to the world and showcasing our rich cultural heritage and renowned hospitality. It is pleasing to see young Saudis so enthused and prepared for this future, with 33% saying one of their top three skills is their ability to engage with people from other cultures.

We are proud to be a diverse and inclusive organisation and understand that to achieve our ambitions we need people who embody those values throughout the destination. By the time the Project is completed in 2030, we anticipate that the destination will support 35,000 direct jobs and another 35,000 indirect and induced jobs, representing a significant contribution to employment nationally.

These targets are bold, but they are necessary if we are to create a lasting impact on Saudi Arabia and a skilled workforce able to provide a unique experience for our guests that will make The Red Sea Project so special.

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***"We are proud to be a diverse and inclusive organization and understand that to achieve our ambitions we need people who embody those values throughout the destination."***



Ahmad Darwish  
Chief of Staff

# Methodology

*The Future Faces of Tourism* research project was conducted by PSB Insights to understand attitudes towards hospitality and tourism careers. The survey is the first of its kind to be conducted in Saudi Arabia and covers five locations in the country (*Riyadh, Jeddah, Dammam, Qassim and Madinah*).

PSB Insights is a global strategic research and analytics consultancy. PSB Insights conducted 855 face-to-face interviews with Saudi nationals between February 5<sup>th</sup> 2020 and March 17<sup>th</sup> 2020 with two audiences:



## Prospective employees

Those aged 16-34, either in education, working or actively looking for employment



## Parent influencers

Parents with children aged 14-24



A total of **715** prospective employees and **140** parent influencers were interviewed.



Respondents were selected to provide an accurate reflection of each location geographic and socio-economic make-up.

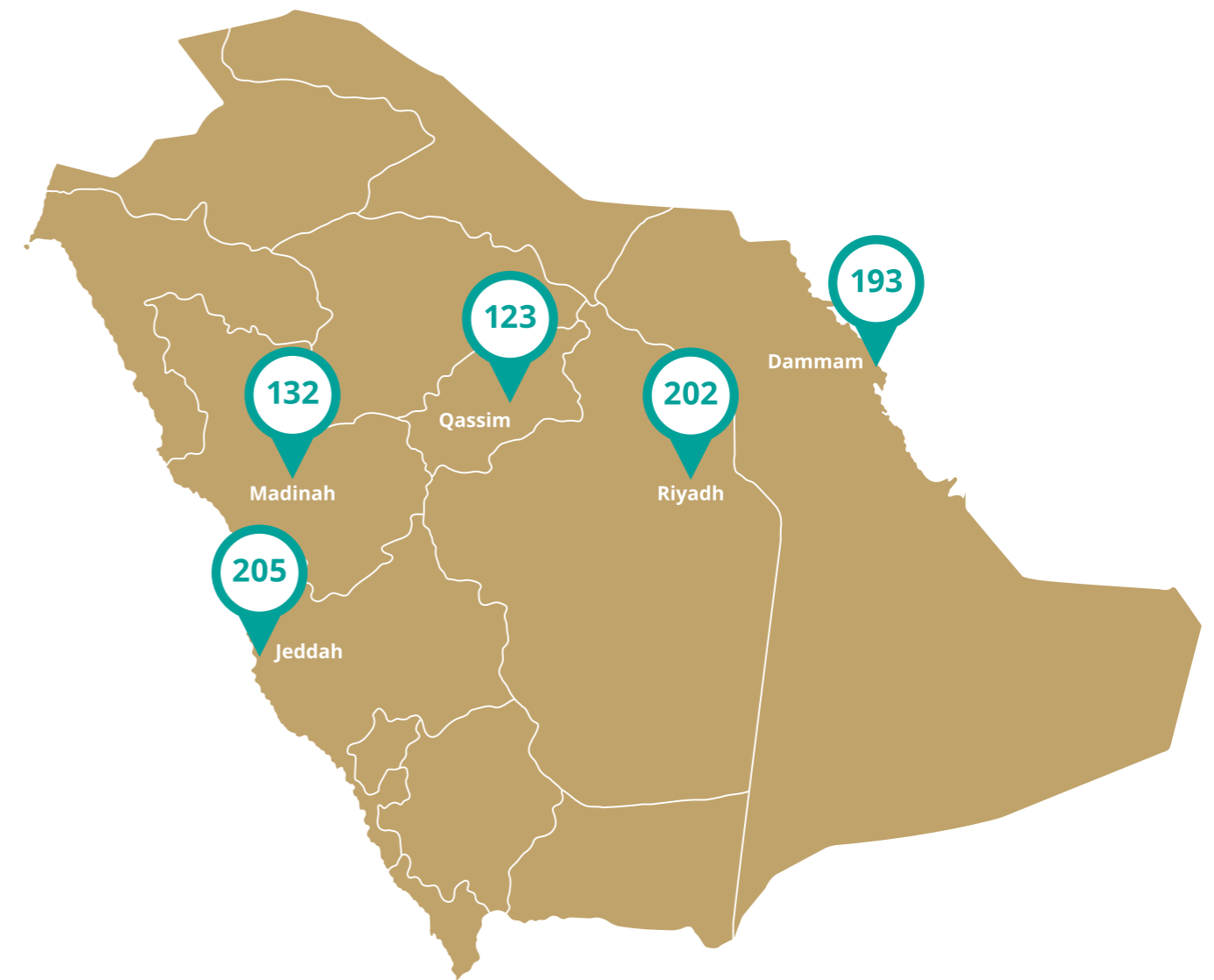


The respondents had the choice of conducting the survey in Arabic or English.



The margin of error on this overall audience is **3.4%** and higher for subgroups.

All numbers within this document represent percentages.

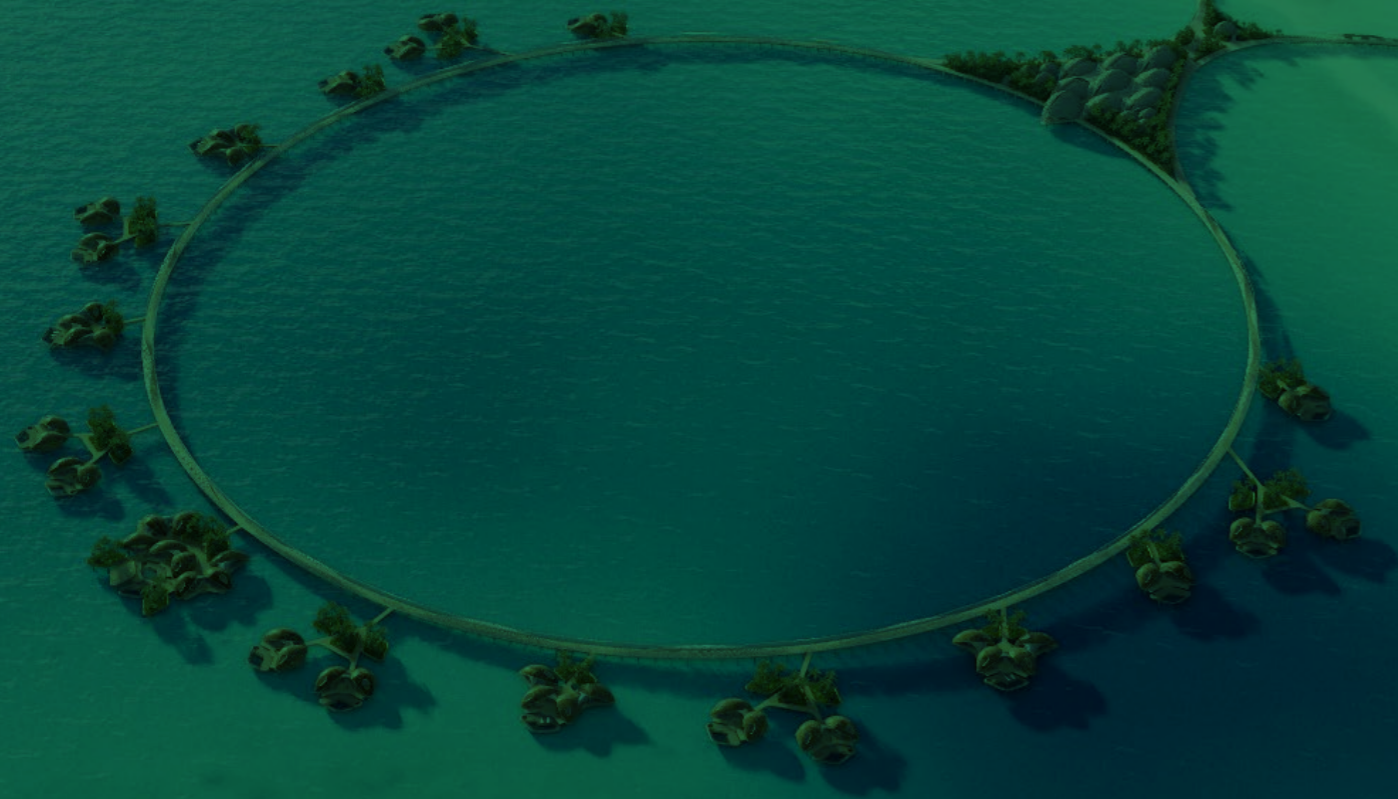


Regions of Saudi Arabia

# 1

## Embracing Saudi Arabia's Future

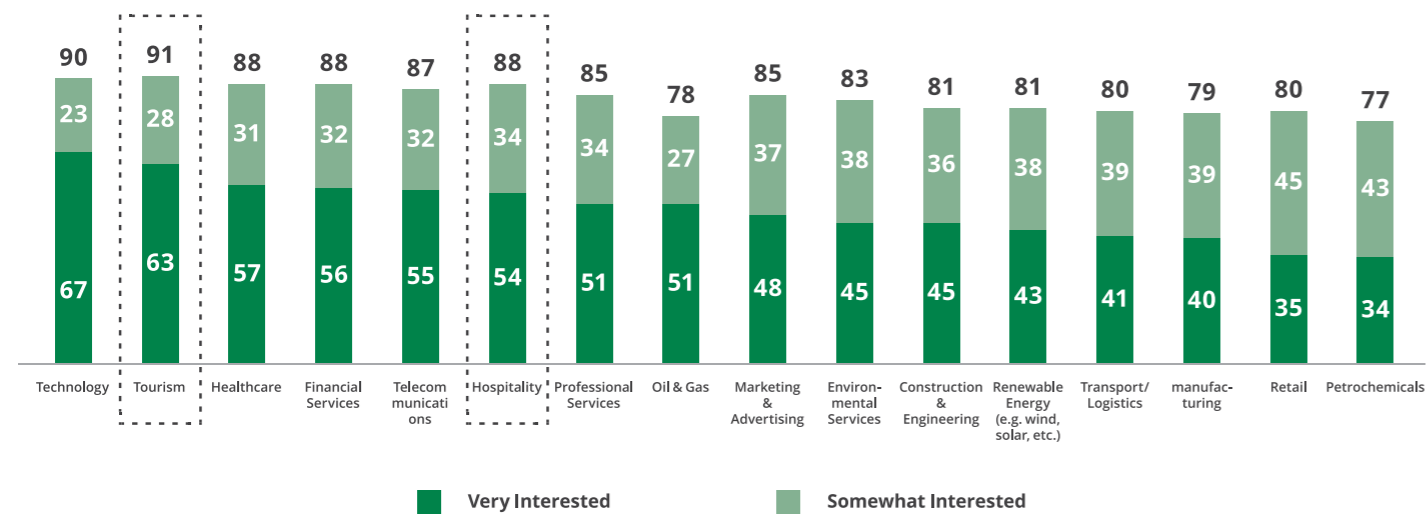
*Tourism and hospitality sectors lead a new wave of career opportunities for young Saudis*



A burgeoning tourism and hospitality sector will allow Saudi Arabia to open up to the rest of the world like never before, and young Saudis are embracing this prospect. More young Saudis are looking towards careers in tourism and hospitality than they are in 'traditional' sectors such as oil and gas and petrochemicals according to the research.

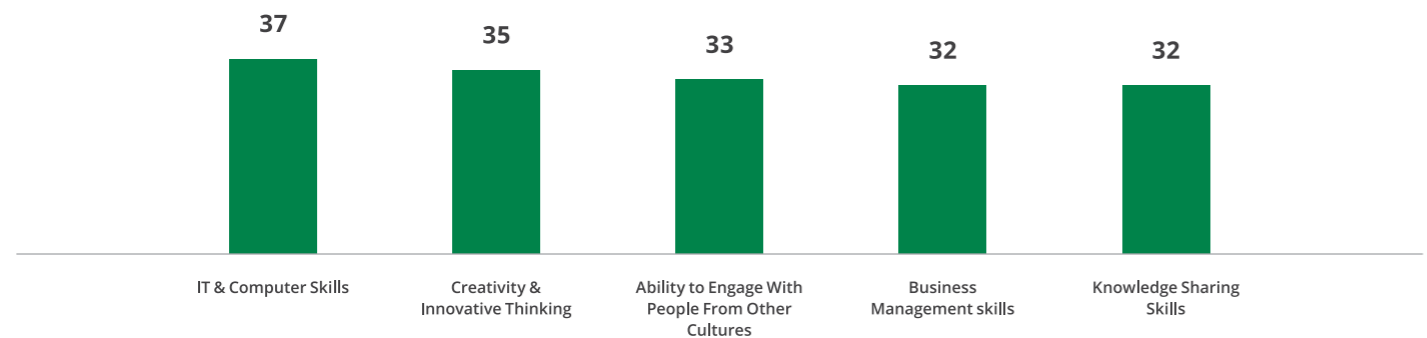
When asked about how interested they would be in pursuing a career in a range of sectors, tourism, hospitality, technology and healthcare rank top in the careers that appeal most to young Saudis. Conversely, sectors synonymous with Saudi Arabia, such as petrochemicals, oil and gas and manufacturing, rank lower. In another contrast, nine in ten (91%) young Saudis are interested in pursuing a career in tourism, compared to just over three quarters (77%) who are interested in a career in petrochemicals. This shift in the interests of the younger population augurs well for Saudi Vision 2030 and the Kingdom's ambition to diversify its economy.

**Prospective employees' views on sectors to work in**  
**Q: How interested would you be in pursuing a career in...?**



It appears that young Saudis are also well prepared to welcome these new visitors. When asked about their current skillsets, they believe that the ability to engage with people from other cultures is one of their top three skills, showing that they are ready to share their country with the world.

**Prospective employees' current skillsets**  
**Q: Which of the following skills would you say are your strongest?**  
 (Showing top 5 skills)

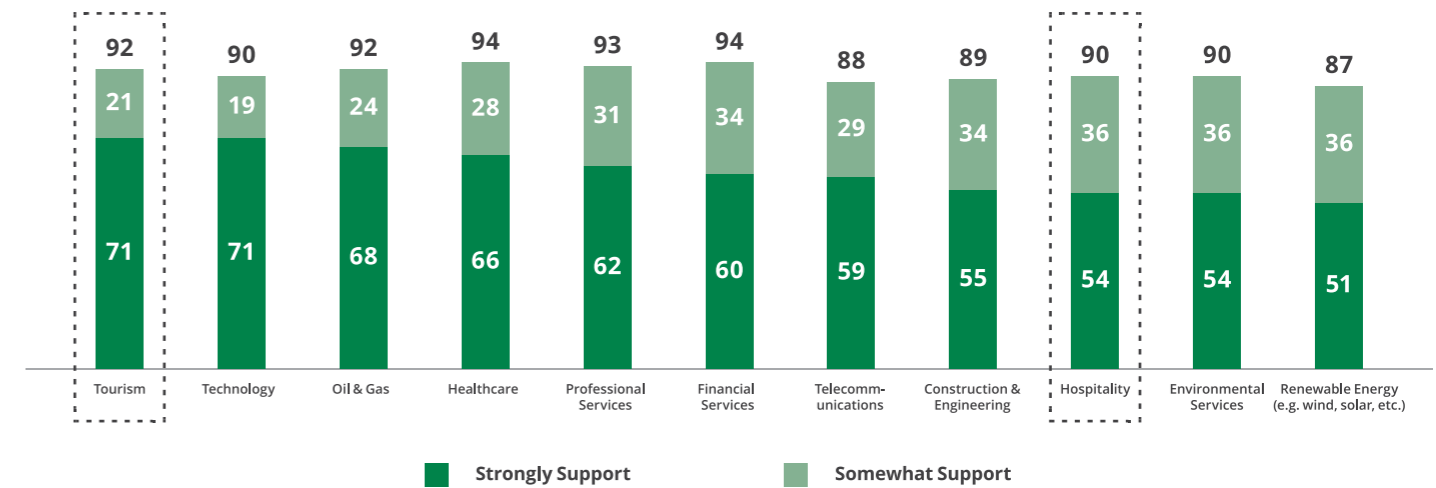


Prospective employees

Parents

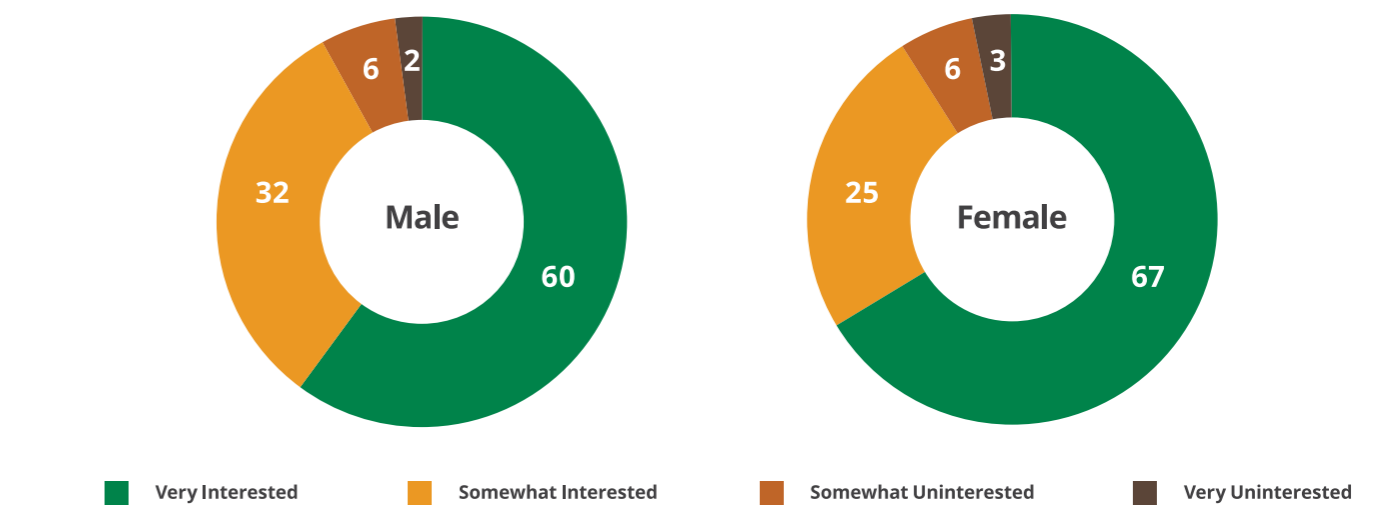
While the findings indicate the younger generation's enthusiasm to embrace new emerging sectors, the country's traditional sectors still appear to appeal more to their parents. Whilst parents and their children align in their perceptions on the tourism and technology sectors, for parents, traditional sectors such as oil & gas (92%) and professional services (93%) rank more highly than they do for the younger generations.

**Parents' view on sectors to work in**  
**Q: To what extent would you support or oppose your child pursuing a career in...?**  
 (showing top 10, sorted by "strongly support")



The research also concluded that both men and women share an interest and enthusiasm for new and emerging sectors. Asked whether they believed a career in tourism is interesting, the sector appeals slightly more to women (67%) than men (60%).

**Interest in working in tourism across gender**  
**Q: How interested would you be in pursuing a career in tourism?**  
 (Not showing those who answered "don't know")



# 2

## Preparing for Tomorrow's Job Market

*Young Saudis are aligning their skillsets in anticipation of the jobs of the future*

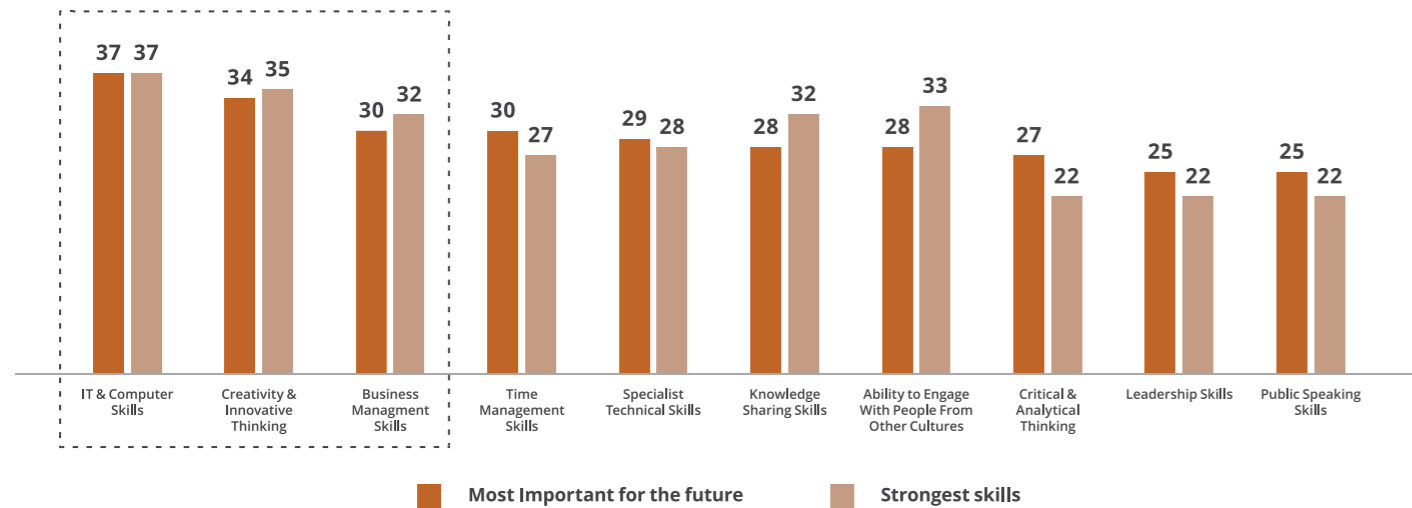
When considering the skills required for the future, young Saudis prioritize soft skills (i.e. traits and behaviors that enable an individual to adapt and thrive in different situations) more highly than technical or traditional competencies including 'knowledge sharing', 'time management' and 'creativity and innovative thinking'.



### Alignment of current and future skills

**Q: Thinking about the skills required in a workplace, which skills would you say will be the most important in the future/are you strongest in?**

(Showing top 10 future skills)



Across the country, young Saudis are looking to diversify their skills by moving away from more traditional proficiencies in order to prepare for the jobs of the future. When asked about the skills they see as being the most important in the future, young Saudis identify IT and computer skills (37%), creativity and innovative thinking (34%) and business management (30%) as the most important. This bodes well for Saudi Arabia's future, as both IT and computer skills (37%) and creativity and innovative thinking (35%) are also deemed to be the top ranked skills young Saudis possess today.



### Overlap in current and future skills

Top five skills <b>strongest in</b>	
IT & Computer Skills	37
Creativity & Innovative Thinking	35
Ability to Engage With People From Other Cultures	33
Business Management Skills	32
Knowledge Sharing Skills	32

Top five skills <b>for the future</b>	
IT & Computer Skills	37
Creativity & Innovative Thinking	34
Business Management Skills	30
Time Management Skills	30
Specialist Technical Skills	29



Prospective employees

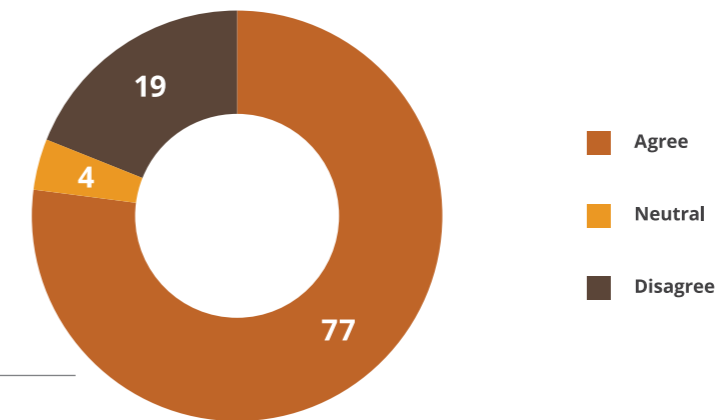
There is also an optimism amongst young Saudis that, despite tourism and hospitality still being emerging sectors, they have the right skills to succeed, with over three quarters (77%) believing this to be the case. Comparatively, women are more confident in their ability than men, as four fifths (80%) of women believe they have the necessary skills compared to three quarters (74%) of men. Despite thinking that they have the right skills to succeed, the majority of prospective employees (88%) would still like to receive training in order to succeed in the tourism and hospitality sectors, demonstrating the opportunity for employers, universities and governments to provide suitable training programs to help equip the right talent for the sector.



### Skills for tourism and hospitality

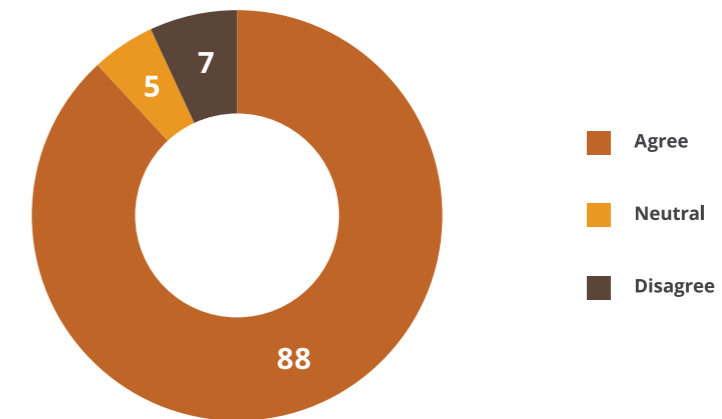
**I have the right skills to succeed in tourism/hospitality**

Women (80%) are more likely to see themselves as having the right skills than men (74%)



### Training requirements for tourism and hospitality

**I would need to receive training in order to have the right skills to succeed in tourism/hospitality**



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# 3

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## A Sector Full of Opportunity

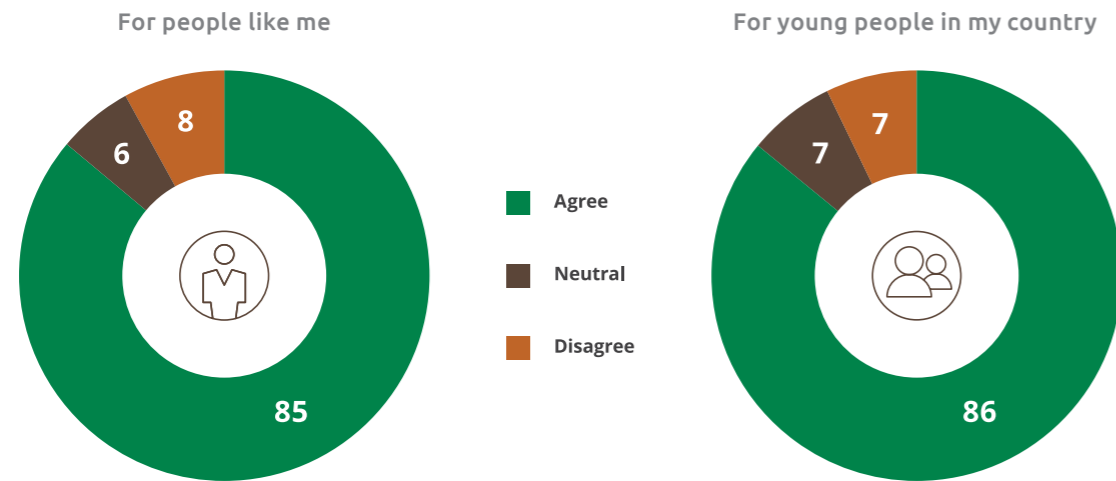
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*Using future sectors to deliver on lifestyle expectations*

When looking ahead to the careers of the future, the flourishing tourism and hospitality sector is increasingly viewed as one that can provide young Saudis with a better lifestyle.

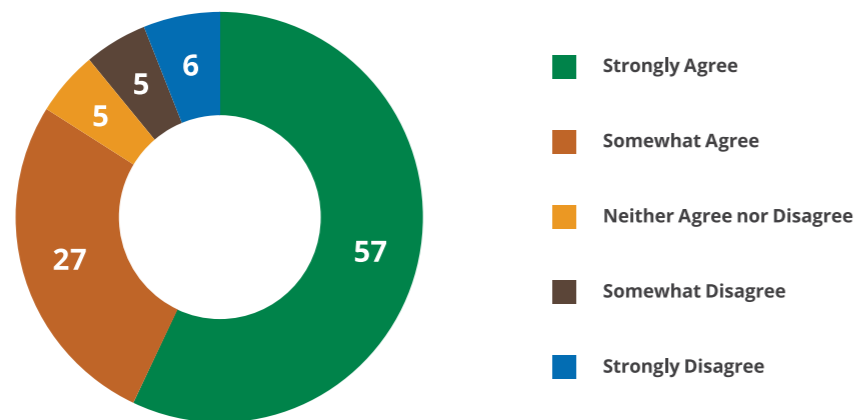
The research found that over eight in ten (85%) young Saudis think a career in the tourism and hospitality sector would provide them with good opportunities while a similar number (84%) believe it will give them the quality of life they aspire to.

**Expectations of opportunities in the sector**  
There are good opportunities in tourism and hospitality



Somewhat surprisingly parents of young Saudis agree. A similar number of parent respondents (86%) believe there are good opportunities in tourism and hospitality for young people in Saudi Arabia.

**Quality of life from the tourism industry**  
The tourism and hospitality industries will give me the salary and resources that I expect from life



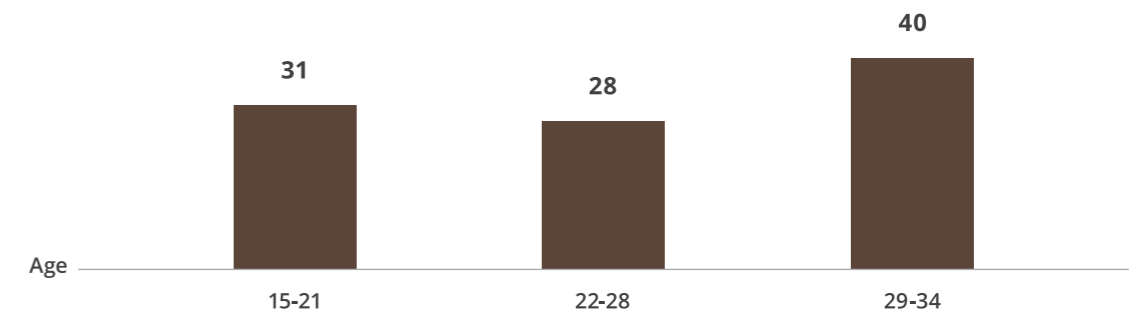
When looking at a future career, salary is prioritized as the top attribute young Saudis want from a career (33%), followed by job security (22%) and opportunities for personal and professional growth (19%).

**Most important attributes when choosing a job**  
Q: Which of the following is most important to you when choosing a job?  
(Showing top 11)



The importance placed on salary also increases with age among prospective employees, likely as a result of taking on more commitments such as home ownership and expanding their families. Of those aged between 15-21, just under a third (31%) believe salary to be the most important factor when looking at a career, however, this rises to four in ten (40%) of those aged between 29-34.

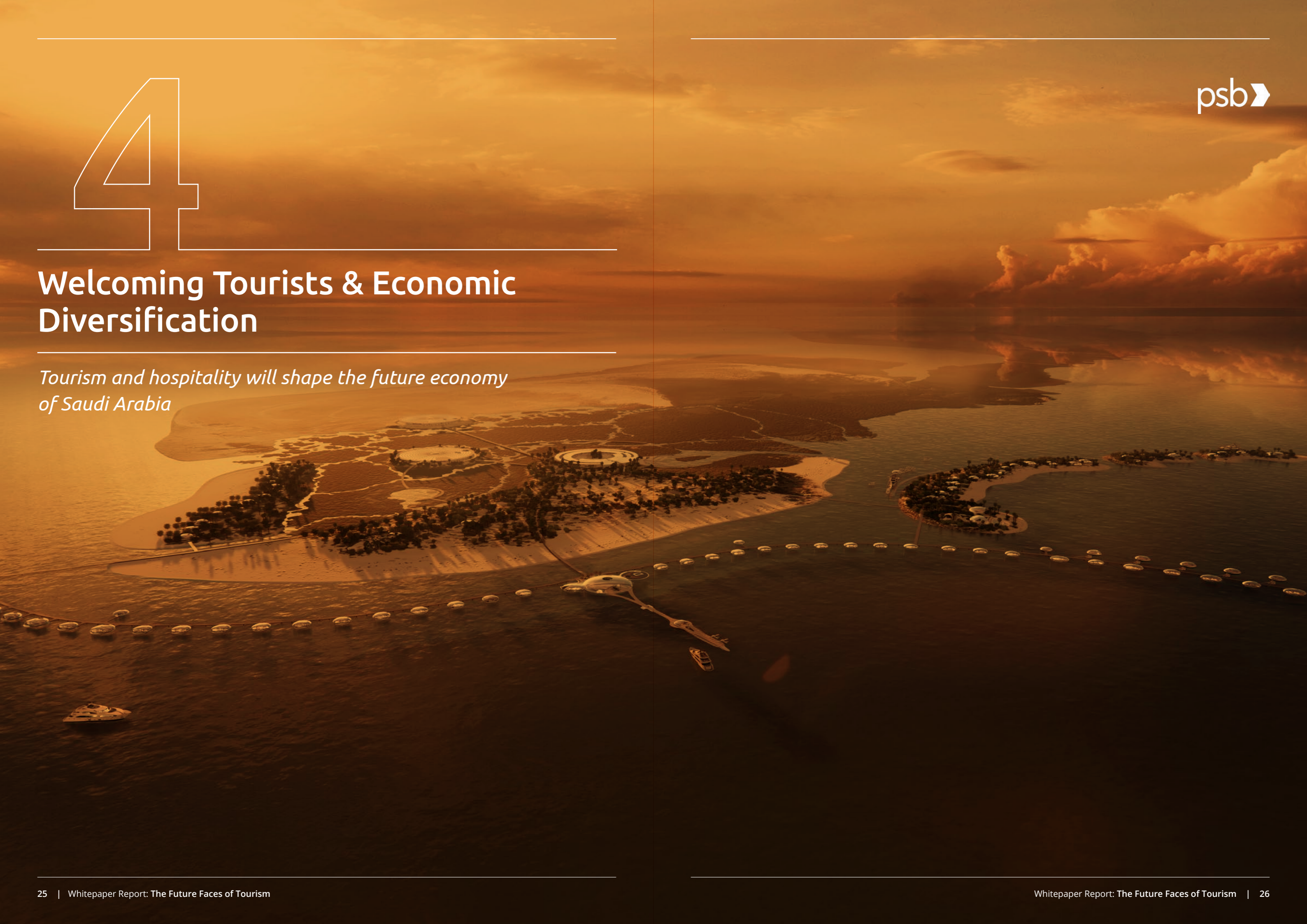
**The importance of salary at different ages**  
Q: Which of the following is most important to you when choosing a job?  
(Showing "good salary")



# 4

## Welcoming Tourists & Economic Diversification

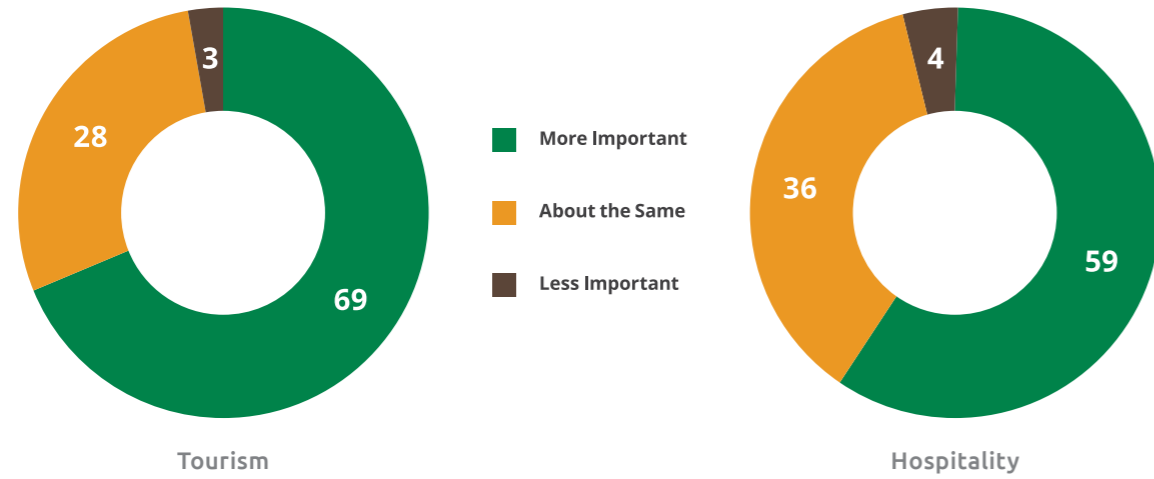
*Tourism and hospitality will shape the future economy of Saudi Arabia*



As outlined in Saudi Vision 2030, the tourism and hospitality sectors are set to play an increasing role in the country's new diversified economy. Tourism represents more than 10% of global GDP, yet in the Kingdom, the figure is much lower, at just 3.4%, which indicates tremendous potential for growth.

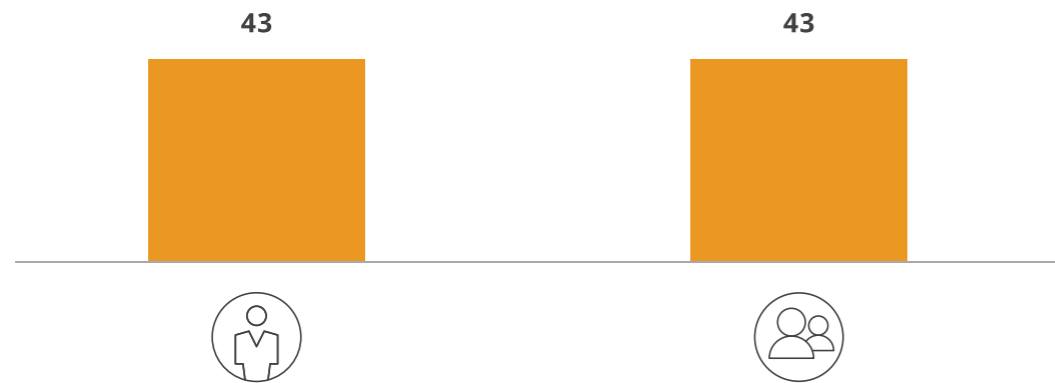
It is therefore encouraging that both young Saudis and their parents recognize this, with more than two thirds (69%) and six in ten (59%) believing tourism and hospitality will become more important for the Saudi economy in the next ten years respectively.

**Importance of sectors in the next decade**  
**Importance of the tourism and hospitality industries to the Saudi economy in the next ten years**



It is also clear that these sectors are perceived as being important for the country's future economic prosperity and development. Of those surveyed, four in ten (43%) young Saudis and the same proportion of parents (43%) believe that tourism is crucial for their country's economy and development.

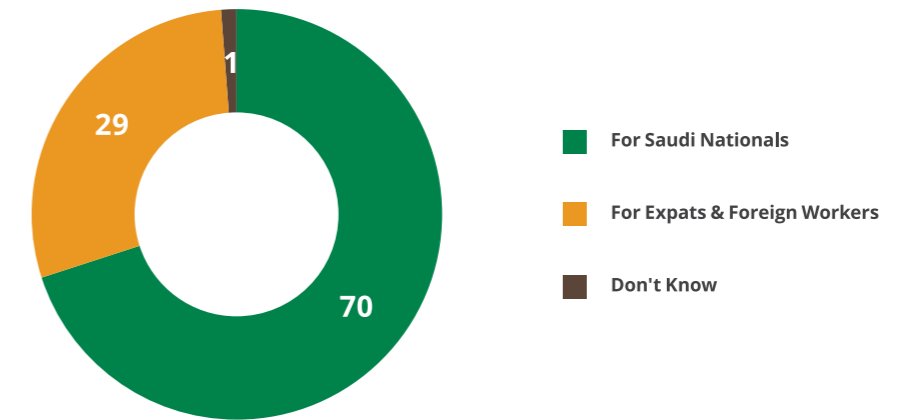
**Importance of the sectors for economic development**  
**Q: Thinking about the tourism and hospitality industries, which of the following would you say apply to the sector?**  
 (Showing "is crucial for my country's economy and development")



Prospective employees      Parents      Prospective employees/Parents

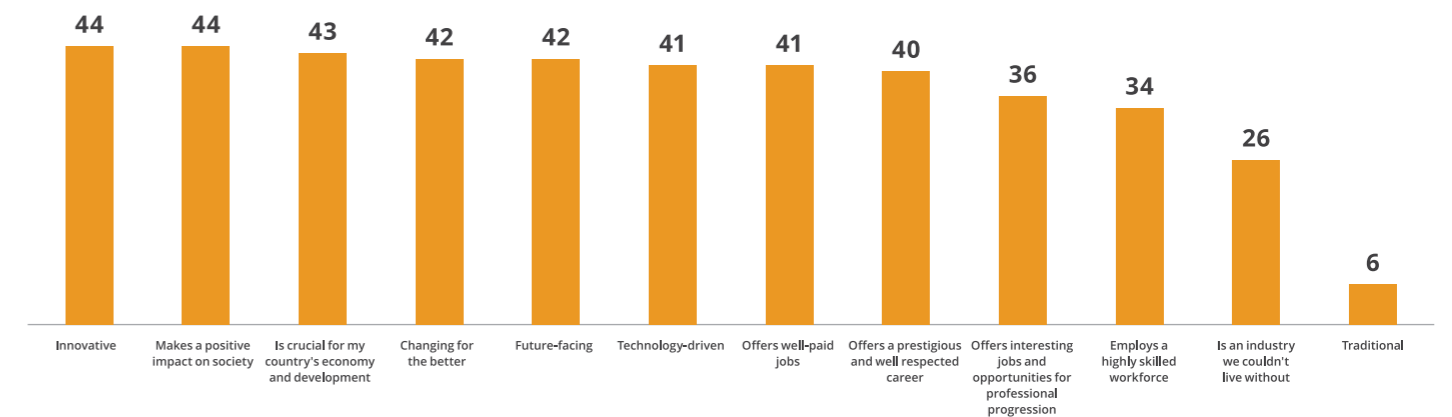
Given its perceived importance to the economy, it is promising that the sectors are also seen as key drivers of employment for Saudi nationals, over expat and foreign workers. When asked, over two thirds (70%) of respondents believe that an expanding tourism and hospitality industry would provide jobs for Saudi nationals, with less than three in ten (29%) believing it is primarily for expat and foreign workers.

**Sector is primarily for Saudis**  
**The tourism/hospitality industry is primarily for...**



Despite the sector's recent emergence in Saudi Arabia there is already a groundswell of recognition that it will play a key role in the country's future. As the country looks to move away from its traditional revenue streams and towards new sectors, Saudis are acknowledging the change that will be seen within the country with four in ten (43%) believing it is crucial for their country's economy and development in the future.

**Key attribute of the tourism and hospitality sectors**  
**Q: Thinking about the tourism and hospitality industries, which of the following would you say apply to the sector?**





**Abeer Aljanahi**  
Hospitality Specialist, Finance &  
Investment at TRSDC

## Case Study: Abeer Aljanahi

*Hospitality Specialist, Finance & Investment at TRSDC*

For many Saudis my age, the tourism and hospitality sectors haven't always been the top choice when deciding the career path you want to follow. Instead, many look at more traditional options such as a doctor, lawyer or engineer.

That was certainly my experience. I always knew I wanted to help others, and I initially thought the only way I could accomplish this goal was to pursue a career as a doctor. Little did I know how wrong that theory was.

When I applied to the University of Utah through the King Abdullah Scholarship program, I was still unclear about the career path I wanted to take. I stumbled across a class on hospitality management and sustainable tourism and at that moment realized that there are ways to help people without a medical degree.

Through my degree studies, I had unrivaled opportunities to work with people from all walks of life, cultures and backgrounds and that's how I became certain I wanted to work in the hospitality industry. My studies opened up a range of job opportunities for me – I've done everything from working as a manager at a start-up, to gaining a place on the Elite Graduate Program at The Red Sea Development

Company where I see first-hand the changes taking place in Saudi Arabia each day.

My experiences have taught me that there are so many ways that you can give back. Whether you are acting as a guide, providing a unique experience for others, or delivering excellent customer service, you have the chance to shape someone's experience and perception of your country. That's a job I take on with great pride.

I am not the only one to realize the array of new opportunities available in Saudi Arabia's new era of tourism, and it's fantastic to see more people getting involved. This is an exciting time to be part of the industry, and I am also proud to be contributing to Vision 2030, which is transforming this industry I am so passionate about.

The opportunities within the sector are seemingly endless with an undiscovered region suddenly open to curious international visitors. I feel like a pioneer in this new era of hospitality where I am able to showcase Saudi's culture and the wonders of our nation for the first time to many.

I would urge any Saudi student who is uncertain about their future to consider a career in the tourism and hospitality sectors. I am

fulfilling my dream of helping others live their fullest life, while also living mine.

*"I feel like a pioneer in this new era of hospitality where I am able to showcase Saudi's culture and the wonders of our nation for the first time to many."*

# Conclusion:

## Mohammed Marghalani

*General Manager of the Ritz-Carlton in Riyadh*

Twenty years ago, Hospitality & Tourism Management was a rare subject to study in the Kingdom. While my school peers were exploring career paths in engineering, medicine and finance, encouragement from my father opened up a whole new world to me and took me down a very different path to get to where I am today.

My first steps into the world of hospitality were taken at the Prince Sultan College where I studied Tourism and Management. It was here that my appreciation for etiquette and attention to detail was instilled in me. I was hooked from my very first semester, so much so that I continued further professional development with the likes of Glion Institute of Higher Education and later, an MBA with Ecole hôtelière de Lausanne in Switzerland.

Those qualifications helped me get my foot in the door with some of the biggest international brands, from the Four Seasons to the Fairmont and right through to my current job at the Ritz-Carlton where I form part of an internationally recognized community. There, working side-by-side with world-renowned experts and putting theory into practice, I truly learned my art.

Throughout my time in the industry, I've greeted heads of state, travelled

continents, facilitated some of the Kingdom's biggest events and welcomed thousands of people who are looking to explore this wonderful country.

The day-to-day is exciting and fast-paced but the broader skills and knowledge that I have learned along the way have been most valuable. If I could give advice to anyone at the start of their career journey, I would tell them to embrace every opportunity. Whether it be a new professional relationship, an interesting training session or a chance to work on a new project, it all contributes to a feeling of empowerment in taking control of your own future.

I feel very fortunate to have had these experiences throughout my career but the truth is, this is only the beginning. The Kingdom is opening up, not only to international visitors but also to a world of opportunity for those who want to pursue a career in tourism and hospitality. From travel, to training, to immersing yourself in new cultures, the opportunity is open to all.

The hospitality and tourism sectors will play a key role in diversifying our economy over the next ten years. And I'm encouraged that young Saudis are beginning to

realize how rewarding a career in these sectors can be. We've come a long way since I first entered the industry and I feel both honored and excited that we can play a part in building the future Saudi Arabia together.

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***"The Kingdom is opening up, not only to international visitors but also to a world of opportunity for those who want to pursue a career in tourism and hospitality."***



**Mohammed Marghalani**  
General Manager of the Ritz-Carlton  
in Riyadh



# About The Red Sea Development Company

*The Red Sea Development Company (TRSDC)* is a closed joint-stock company wholly owned by the Public Investment Fund (PIF) of Saudi Arabia. TRSDC was established to drive the development of The Red Sea Project, a luxury tourism destination that will set new standards in sustainable development and position Saudi Arabia on the global tourism map.

The destination will include hotels, residential properties, leisure, commercial and entertainment amenities, as well as supporting infrastructure that emphasizes renewable energy and water conservation and reuse. By completion in 2030, it is anticipated that The Red Sea Project will support 70,000 direct, indirect and induced jobs for Saudis.

Preparing people for these jobs is an essential part of The Red Sea Development Company's strategy. It has partnered with the University of Prince Mugrin and the École hôtelière de Lausanne to provide scholarships for young Saudis to study International Hospitality Management. This initiative will help young Saudis develop the skills they need to work with The Red Sea Development Company and even the nation's other tourism development projects.

TRSDC also launched the Elite Graduate Program, hiring 31 young Saudis in January 2020. The new employees are being provided with training and direct work experience in the head offices and at the site, where relevant. Each graduate accepted onto the program is afforded a unique opportunity to work side-by-side with a

world-class team of professionals across different departments in order to qualify the candidates and enable them to make more informed career decisions.

The million-square meter landscape nursery welcomed 45 Saudis from the Umluj and Al Wajh communities as full-time employees, following a graduation ceremony in February this year, at the Umluj campus of the University of Tabuk. Each trainee received theoretical and on-site training at Umluj Municipality's nursery, with a study schedule covering a conversational English course, including key words, terms and phrases related to agriculture, plant nursing and irrigation. The facility will eventually provide over 15 million plants to landscape The Red Sea Project, one of the world's most ambitious tourism initiatives.

*"The facility will eventually provide over 15 million plants to landscape The Red Sea Project, one of the world's most ambitious tourism initiatives."*