# List of Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.1</td>
<td>Tourism Development Zone</td>
<td>11</td>
</tr>
<tr>
<td>1.1</td>
<td>Location of Red Sea Tourism Strategy Area</td>
<td>16</td>
</tr>
<tr>
<td>2.1</td>
<td>Provincial Boundaries</td>
<td>24</td>
</tr>
<tr>
<td>2.2</td>
<td>Main Road Network</td>
<td>33</td>
</tr>
<tr>
<td>2.3</td>
<td>Red Sea Airports - International, national &amp; local</td>
<td>34</td>
</tr>
<tr>
<td>2.4</td>
<td>Main Sea Ports &amp; Proposed Rail Link</td>
<td>34</td>
</tr>
<tr>
<td>2.5</td>
<td>Desalination Plants</td>
<td>35</td>
</tr>
<tr>
<td>3.1</td>
<td>Biogeographical Regions</td>
<td>40</td>
</tr>
<tr>
<td>3.2</td>
<td>Density of Coral Coverage</td>
<td>41</td>
</tr>
<tr>
<td>8.1</td>
<td>Tourism Development Zone</td>
<td>88</td>
</tr>
<tr>
<td>8.2</td>
<td>Development Strategy Framework</td>
<td>95</td>
</tr>
<tr>
<td>8.3</td>
<td>Jeddah</td>
<td>96</td>
</tr>
<tr>
<td>8.4</td>
<td>Yanbu</td>
<td>96</td>
</tr>
<tr>
<td>8.5</td>
<td>Farasan Islands</td>
<td>97</td>
</tr>
<tr>
<td>8.6</td>
<td>Jizan</td>
<td>97</td>
</tr>
<tr>
<td>8.7</td>
<td>Tabuk</td>
<td>98</td>
</tr>
<tr>
<td>8.8</td>
<td>South Makkah/Aseer</td>
<td>98</td>
</tr>
<tr>
<td>8.9</td>
<td>Red Sea Islands</td>
<td>99</td>
</tr>
<tr>
<td>10.1</td>
<td>Potential Sites for Resort Development in Greater Jeddah area</td>
<td>114</td>
</tr>
<tr>
<td>10.2</td>
<td>Potential Sites for Resort Development in Yanbu</td>
<td>115</td>
</tr>
<tr>
<td>10.3</td>
<td>Tourist Sites on the Farasan Islands</td>
<td>116</td>
</tr>
<tr>
<td>10.4</td>
<td>Potential location for Aquaria</td>
<td>119</td>
</tr>
<tr>
<td>10.5</td>
<td>Al Muwailah Fort</td>
<td>124</td>
</tr>
<tr>
<td>10.6</td>
<td>Visitor Center Layout</td>
<td>125</td>
</tr>
<tr>
<td>10.7</td>
<td>Hijaz Railway Project</td>
<td>129</td>
</tr>
</tbody>
</table>
List of Tables

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Classification of Heritage Sites</td>
<td>25</td>
</tr>
<tr>
<td>2.2</td>
<td>Archaeological Sites</td>
<td>26</td>
</tr>
<tr>
<td>2.3</td>
<td>Castles, Forts &amp; Palaces</td>
<td>28</td>
</tr>
<tr>
<td>2.4</td>
<td>Other Historic Sites related to the life of the Prophet (PBUH)</td>
<td>29</td>
</tr>
<tr>
<td>2.5</td>
<td>Historic Towns</td>
<td>30</td>
</tr>
<tr>
<td>2.6</td>
<td>Museums (cultural heritage)</td>
<td>32</td>
</tr>
<tr>
<td>3.1</td>
<td>Summary of Threats to the Red Sea Environment</td>
<td>45</td>
</tr>
<tr>
<td>4.1</td>
<td>International Conventions signed by the KSA</td>
<td>54</td>
</tr>
<tr>
<td>4.2</td>
<td>Regional Conventions</td>
<td>54</td>
</tr>
<tr>
<td>7.1</td>
<td>Environmental Impact Matrix</td>
<td>74</td>
</tr>
<tr>
<td>7.2</td>
<td>Measurement of Visitor Carrying Capacities</td>
<td>75</td>
</tr>
<tr>
<td>8.1</td>
<td>Forecasts of Red Sea Tourism to 2020</td>
<td>86</td>
</tr>
<tr>
<td>8.2</td>
<td>Phased Forecasts for Red Sea Tourism</td>
<td>87</td>
</tr>
<tr>
<td>8.3</td>
<td>Evaluation of Development Criteria at Tourist Sites</td>
<td>89</td>
</tr>
<tr>
<td>9.1</td>
<td>Heritage Product-Market Mix</td>
<td>104</td>
</tr>
<tr>
<td>9.2</td>
<td>Market Priorities</td>
<td>105</td>
</tr>
<tr>
<td>9.3</td>
<td>Product/Market Fit</td>
<td>112</td>
</tr>
<tr>
<td>10.1</td>
<td>Heritage Hotel Components</td>
<td>122</td>
</tr>
<tr>
<td>10.2</td>
<td>Heritage Hotel Role Models</td>
<td>123</td>
</tr>
<tr>
<td>10.3</td>
<td>Historic Towns - Heritage Links</td>
<td>128</td>
</tr>
<tr>
<td>10.4</td>
<td>Constraints and Opportunities</td>
<td>128</td>
</tr>
<tr>
<td>10.5</td>
<td>Recommended event plan</td>
<td>133</td>
</tr>
<tr>
<td>12.1</td>
<td>Action Plan</td>
<td>143</td>
</tr>
<tr>
<td>13.1</td>
<td>Phase 1 Development Programme Investment</td>
<td>155</td>
</tr>
<tr>
<td>13.2</td>
<td>Estimated Tourism Expenditure 2006 - 2014 SR mills (2005 Values)</td>
<td>156</td>
</tr>
<tr>
<td>13.3</td>
<td>Estimated Foreign Exchange Earnings 2006</td>
<td></td>
</tr>
<tr>
<td>13.5</td>
<td>Estimated Tourism GDP/Value Added 2006 - 2014 SR mills (2005 Values)</td>
<td>158</td>
</tr>
<tr>
<td>13.6</td>
<td>Estimated Employment Created 2006 - 2014</td>
<td>158</td>
</tr>
<tr>
<td>13.7</td>
<td>Output Multiplier Effect 2006 - 2014 SR mills (2005 Values)</td>
<td>159</td>
</tr>
<tr>
<td>13.8</td>
<td>Income Multiplier Effect 2006 - 2014 SR mills (2005 Values)</td>
<td>159</td>
</tr>
<tr>
<td>13.9</td>
<td>Value Added Multiplier Effect 2006 - 2014 SR mills (2005 Values)</td>
<td>159</td>
</tr>
<tr>
<td>13.10</td>
<td>Employment Multiplier Effect 2006 - 2014 (Jobs Created)</td>
<td>160</td>
</tr>
</tbody>
</table>

RED SEA TOURISM STRATEGY AND ACTION PLAN
Contents

Executive Summary .............................................................. 7
1 Introduction ........................................................................ 15
2 Current Tourism Situation ............................................... 19
3 Marine and Coastal Environment ................................ 39
4 Policy, Legislative and Institutional Framework ............... 49
5 Comparisons and Best Practice ........................................ 59
6 SWOT Analysis and Vision .............................................. 67
7 Strategic Policy Guidelines .............................................. 71
8 Tourism Development Strategy ....................................... 85
9 Marketing Strategy ........................................................... 101
10 Product Concepts ............................................................. 113
11 Additional Recommendations ....................................... 135
12 Action Plan ...................................................................... 143
13 Economic Impact ............................................................ 147

Appendices
A Management Approach to Conservation .................. 163
B Priority Sites for Protected Areas ............................ 169
C Hotel Design Guidelines ............................................... 173
D Development Programme 2006-2010 ....................... 179
Key Summary Points

- With 1840 kilometres of Red Sea coastline the eastern shores of Saudi Arabia can play a major role in expanding the tourism product of the Kingdom.

- The Red Sea coastal zone already plays a major role in the Kingdom’s tourism, through Jeddah serving as the main international gateway to the Holy sites of Makkah and Madinah, and Jeddah’s role as the Kingdom’s leading resort.

- Currently around 13 million domestic and 3.5 million international tourists come to the Red Sea area, with over 90% accommodated in Jeddah.

- These levels are expected to grow to over 36 million domestic and nearly 6 million international visitors over the next twenty years, given a continuation of recent trends and the current social policy.

- Building on a series of Provincial Tourist Strategies, this study identifies considerable scope for investors and communities along the coast to provide appropriate facilities to cater for this anticipated growth.

- However the tourism development opportunities identified in this study have emerged from a detailed appraisal of the carrying capacity of the sensitive marine and coastal systems that are of international significance.

- The investment opportunities include:
  - Major resort development in Jeddah and Yanbu in the short term, with the Tabuk coast in the longer term;
  - High quality dive centres on the Farasan Islands and Yanbu;
  - Smaller resort development along the coast from the Jordanian border to Jizan.
  - Major tourist attractions of international standard in Jeddah;
  - Local community led eco-tourism and heritage tourism projects;
  - Examples of where tourism development can actively assist in the protection of important conservation sites.

- The impact of the investment over the first five years of the strategy would be worth more than £2.4 billion SAR to the regional economies.

- The achievement of these investment targets will depend upon a well resourced Task Force, guided by the Supreme Commission for Tourism, to ensure that existing planning and environmental regulations are enforced.
Executive Summary

Background

The Red Sea and its shores have played many roles in the life of Saudi Arabia. Historically they have provided access to the Holy Sites of Makkah and Madinah, for those coming by boat or using the coastal pilgrim routes. Commercially they provide a strategic location for the main trading centre and port of Jeddah and the main trading route for much of Saudi Arabia’s oil exports. Culturally the Red Sea has been the home of the Hijaz, an area of mixed heritage and traditions from across the Arab and Islamic world. Environmentally it has given the Kingdom the great responsibility of providing guardianship for one of the world’s most important marine ecosystems, notably its coral reefs.

The task of this current project, the Red Sea Tourism Strategy and Action Plan (RSTS) is to identify what role the Red Sea and its associated coastal area can play in the country’s drive to establish a modern and sustainable tourism industry. However it is recognised that this cannot be achieved without a clear understanding and appreciation of the constraints that such sensitive marine and coastal environments present. The aim of the plan is to address the combined issues of tourism potential and coastal conservation in an integrated way that seeks to exploit areas of mutual benefit as well as mitigate or avoid any areas of potential conflict.

The key stages in the preparation of the RSTS are:
- preparation of an integrated Tourism Development Strategy;
- recommendations regarding the legislative and institutional framework;
- proposals for supporting HR and public awareness campaigns;
- a Five year Action Plan;
- estimates of the financial costs and economic benefits

Tourism Resources and Markets

The five coastal provinces of Tabuk, Medinah, Makkah, Aseer and Jizan together accommodate two thirds of the Kingdom’s domestic tourism, with a total of over 25 million trips. However a significant proportion of such tourist activity is unrelated to the presence of the Red Sea, and is more to do with the presence of the Holy sites of Makkah and Madinah and the summer resorts of Taif and Asir. The main centres of activity that rely on the Red Sea and the heritage of the Hijaz coastal region are Jeddah as the Kingdom’s leading leisure resort, major resort development north of Jeddah; and individual hotels and resorts along the coast from the Farasan Islands near the Yemen border in the south to Haql on the Jordanian border in the north.

By far the greatest concentration of such tourism is in Jeddah with 81 hotels and 9,600 rooms, which makes up 90% of the total stock along the Red Sea. It is also the centre for apartments and resort complexes and the main gateway into the area because of its good road and air links.

Each of the provinces has its own Tourism Development Plan, with a series of project proposals and Action Plans that this study has drawn upon.
The Marine and Coastal Environment

According to the Regional Organisation for the Conservation of the Environment of the Red Sea and Gulf of Aden (PERSGA), these areas represent a complex and unique tropical maritime ecosystem with extraordinary biological diversity and a remarkably high degree of endemism (species unique to the area.). The reasons behind these qualities are a combination of geography and history.

Compared to other tropical coral seas such as the Caribbean or around the Great Barrier Reef in Australia, the Red Sea is almost fully enclosed, and surrounded by countries with desert climates and consequently no permanent rivers feeding into it. With high evaporation rates, salinity is consequently high. Coral reefs and their attendant marine life have therefore developed in isolation and in unique conditions, since their separation from the Indian Ocean. According to PERSGA the reefs are among the most spectacular in the world.

This geographical setting has contributed to protecting the sea and its shores from human development, but also made them extremely vulnerable to such impact in the future. With virtually no tides or currents pollution would be hard to disperse.

The associated coastal zone is subject to an increasing scale and pace of residential and industrial development around the two main centres of Jeddah and Yanbu. Tourism development in the form of resorts and hotels, and activities such as diving and boating is also starting to affect a larger proportion of the coastline, with Jeddah's corniches alone stretching for more than 100 kms, and every small town wishing to develop a corniche of its own.

Institutional Framework

As with any coastal area there are a large number of agencies with responsibilities for the wide range of activities that include maritime actions (and their implications for security, pollution, fisheries and ports), resource development, resource conservation and coastal development. The key agencies are PME (originally MEPA), Ministry of Agriculture, Ministry of Transport, Ministry of Defence, Ministry of Petroleum, Ministry of Municipal and Rural Affairs (MOMRA) and the National Commission for Wildlife Conservation and Development (NCWCD). More recently the Supreme Commission for Tourism has been given responsibility for tourism development in Tourism Development Areas (TDAs).

The main need is for greater coordination between these ministries and agencies and for co-operation in working towards a common goal regarding sustainable development in general and the Red Sea in particular.

Legislation and Policy

Much of the conservation related legislation dates only from the last 25 years and started with Saudi Arabia signing up to international conventions and protocols in the field of conservation, and this has subsequently developed into a broader range of Royal Decrees. However the key agency, MPE has not been given the enforcement and regulatory authority to implement the environmental standards that it would seek to apply, with other Ministries such as the Ministry of Petroleum, Ministry of Agriculture and Ministry of Industry and Electricity retaining regulatory control over their own activities.

A particular failure in legislation has been the non-adoption of a Coastal Zone Management Plan, which was originally submitted by the NCWCD over ten years ago. The more recent submission of a CZMP by MPE may resolve the confusion of responsibilities for development and management in these key areas. The more recent creation of the SCT and the granting of powers to it for the control of tourism development in coastal TDAs needs to be incorporated into the new CZMP.

SWOT

The main strengths that the Red Sea offers with regards its tourism potential are the outstanding qualities of its coral and marine life and the waterfront setting it offers to residents who live in the more arid areas of the Kingdom. This intrinsic appeal to a potentially large domestic market is weakened by the high costs, largely due to the marked seasonality of business at present, and the constraints on leisure activities that are not present at rival resorts in neighbouring countries. The opportunity still exists to develop new tourism products that provide both the high standard facilities required by domestic and international visitors and the environmental protection and benefits that sustainable forms of development can offer. The main threat is that uncontrolled development, of industrial and residential
areas, as well as tourism will destroy the very qualities that tourists come to the Red Sea for.

Vision

It is clear from this analysis that unless steps are taken to improve the nature and quality of development along the Red Sea coast, many of its natural assets and potential will be lost. Within twenty years the uncontrolled sprawl of Jeddah will have covered well over 100kms of coastline, damaging the appeal of the city as a resort, its effectiveness as a commercial centre and its performance as an attractive home for its residents; Yanbu will suffer from the same unplanned sprawl of resorts and apartments around the Sharm; the remaining historic cores to Jeddah, Yanbu, Umm Lujj, Al Wajh and Duba will have deteriorated beyond salvation; attempts to build resorts in more remote locations along the coast will largely fail because of lack of proper planning controls, access and infrastructure leaving a number of half completed constructions; and the ambition to establish a network of protected areas will continue to be thwarted by lack of resources.

However the vision is that due to the wealth of natural and cultural resources throughout the area; the size of the local and national markets; and the resources (human and financial) that can be channelled into a more sustainable tourism development, more vigorous and sustainable forms of development can be achieved. This vision for the development of the Red Sea coastal zone overall, can be expressed in terms of the following aspiration:

‘by 2025 the Saudi Arabian Red Sea will have set new standards in coastal tourism development and management and become the model that other destinations aspire to’

This would mean that by 2025

- the Jeddah Plan had succeeded to prevent the continued sprawl of development and with the accompanying increase in population density, public transport schemes like light railways and trams had reduced the reliance on the automobile and planned satellite settlements such as ‘Thuwal had led to the orderly development of tourism;
- a concerted initiative to increase the amount of open space, parks and leisure facilities in Jeddah had benefited both residents and visitors alike, as had the provision of major new visitor attraction and museums;
- Yanbu had learnt the lessons from Jeddah and tourism development around the Sharm had allowed its conservation value to be protected and enhanced, within a Master Plan for a resort area of international standards;
- Smaller resorts and specialist diving centres had been established south along the coast to Jizan, and north to Haql, better served by road and air, with sustainable infrastructure and links with the heritage attractions of their coastal regions;
- Some such development had generated the additional income to support the management of national and local protect areas and assist local community tourism initiatives;
- The enforced implementation of existing planning regulations and environmental impact assessments had ensured the higher environmental qualities required by local residents and visitors;
- A new Red Sea Programme was carrying out marketing and awareness programmes to raise the profile and understanding of the unique qualities of the Red Sea within the Kingdom and internationally, and
- Red Sea tourism was making a major contribution in providing employment for a larger proportion of the nation’s youth.

Tourism Development Strategy

The strategy for determining the most effective location for the development of new tourist facilities has been guided by a number of principles, namely:

- The protection of those sites of highest conservation value and most sensitive nature (although recognising that limited tourism development may in some cases be the most effective means of protection and enhancement);
- The development of those sites with the least infrastructure costs, and
- The support for those projects with identifiable markets.

Zones can be categorised as:

a) Conservation and No Development Zones e.g. Red Sea’s coral islands
b) Restricted Development Zones e.g. Farasan Islands
c) Limited or medium term Development Zones e.g. Jizan and Tabuk
d) Immediate Development Zones e.g. Yanbu and Jeddah

The tourism development strategy map thus shows seven distinct areas:

i) Jeddah – with over 90% of the Red Sea’s tourist facilities already, this fast expanding city will still
be the focus of most of the area’s development, in order to generate the required jobs and support the restoration of old Jeddah;

ii) Yanbu – a fast developing resort and diving centre, with considerable further potential, linking into the heritage of the Madinah Province;

iii) Farasan Islands – a marine reserve of international significance where limited tourism development is only justified where it contributes to the protection of the sensitive ecosystems;

iv) Jizan – a province with a strong local identity and sites (and markets) for small/medium scale tourism development and community tourism;

v) Tabuk – a border Province with a strong natural resource in its coast and mountains, but limited infrastructure and market access will restrict development to small specialist diving centres and community/adventure tourism in the immediate term, although there is the potential for larger resorts when access is improved;

vi) South Makkah/Aseer - a remoter area, where better coastal roads and links to the mountain resorts, could support specialist, small scale resorts and dive centre;

vii) Red Sea Islands – sensitive ecosystems where there should be a presumption against permanent development, but scope for managed access by specialist groups e.g. divers and naturalists.

Development Programme

The programme of work needed to fulfil the area’s tourism potential is a combination of management and development, and public and private initiatives.

a) Institutional/Legislative
- There must be a new focus on the particular needs of the Red Sea and a new initiative to give it the vision and protection that it merits;
- As an interim measure a Red Sea Task Force (RSTF) within SCT, will be briefed to prepare the ground for a Red Sea Tourism Development Programme (RSTDP);
- Although it will have powers and resources delegated to it by the SCT, it will have a 5 Year life, with specific tasks and targets;
- This new team will be base in the region and work closely with the Provincial Development Authorities and the emerging Provincial Tourism Authorities;
- An additional priority is to ensure the appropriate coverage of the Red Sea in the emerging SCT tourism awareness and marketing campaigns;
- The Coastal Zone Management Plan, prepared and submitted by MPE requires urgent approval at the national level and implementation by all Ministries;
- SCT should enforce its powers to have Environmental Impact Assessments carried out for all tourism development along the coast;
- The new RSTDF should be empowered to collect revenue from visitors to Protected areas;
- This Red Sea Tourism Strategy should itself be the subject of a Strategic Environmental Assessment and the appropriate data collected for the initial benchmarking exercise

b) Infrastructure
- Continue the upgrading of the coastal highway north from Yanbu and south from Al Lith;
- Ensure the appropriate location of new coastal roads so that they serve existing and potential tourist areas and avoid sensitive environmental areas;
- Improve the roads inland from centres such as Al Lith and Al Wajh and between Tabuk and Mada’in Saleh;
- Removal of the Southern Corniche in Jeddah, and replace with a limited number of access roads from the new highway;
- Improve visitor reception facilities at the main KAA International airport at Jeddah;
- Increase the frequency of inter-provincial services along the coast;
- Upgrade third tier airports such as Rabigh;
- Provide an airfield on the Farasan Islands;
- New fast ferry catamaran service to Farasan Islands from Jizan;
- Improve or install cruise passenger facilities at Jeddah, Yanbu, Jizan and Duba;
- Promote the provision of passenger services on the proposed rail links into Jeddah from Riyadh and along the coast.

c) Resources Management

Natural Resources
- Within the context of environmental protection guidelines for the entire coast, prepare or update Conservation Management Plans for the Farasan Islands and Sharm Yanbu, ahead of the preparation of Tourism Masterplans;
- Ensure the preparation of EIAs for all tourism development;
Red Sea Coast Development Zones

Fig. 0.1 Tourism Development Zones
Executive Summary

- Work with other partners on a comprehensive environmental awareness programme for the Red Sea.

Cultural resources
- Work closely with existing initiatives to preserve and enhance the region’s two most important heritage assets, old Jeddah and Mada’in Saleh;
- Develop tourist routes and itineraries to link the region’s coastal and inland sites;
- Develop the sites related to the Hijaz railway as a trail of international potential;
- Encourage the completion of the National Cultural Heritage Strategy and its network of National and Local museums;
- Provide the resources to protect and open up more heritage sites, especially linked to the ancient pilgrimage routes.

d) Support Services/Plans

Tourist Information Centres are needed as a priority in old Jeddah, KAA International Airport, Tabuk, and Jizan;
- The Jeddah Festival needs to be developed and its duration extended, with more sports and maritime related events;
- Jeddah should be developed as the site for major international sporting events, such as powerboating;
- Jeddah requires a Green Space Strategy and a Leisure/Recreation Plan, and a Tourism Development and Management Plan for the Obhur Creek;
- Improved water safety standards, including licensing for lifeguards and divers;
- Support the HR Training and Education Programmes proposed in the Provincial Tourism Plans; The RSTDF needs to prepare an Investment Promotion Strategy for the Red Sea based on the identification of the need for the following tourist facilities.

e) Tourist Facilities

Jeddah
- Additional Business Hotels are needed to serve the proposed new Civil and Business centres within the city;
- An airport hotel is needed to serve the increasing role of Jeddah as the gateway to the Red Sea;
- Promotion of small, boutique hotels in old Jeddah;
- Additional international standard hotels along the Northern Corniche;

- Upgrading of the resorts and villa complexes being developed north of Obhur Creek;
- Support for the Durrat al Rous and Al Buhairat resort complexes for the earliest completion of their projects;
- A Tourism Master Plan for the Thuwal area, ahead of its development as a major satellite town for Jeddah;
- Development of a major, international standard Aquarium in Jeddah, to act as a visitor attraction and flagship for Red Sea research and conservation;
- A major Maritime Museum near old Jeddah, to link this heritage area with the sea again.

Yanbu
- Additional business hotels to support the major industrial expansion of the industrial area;
- Range of resort hotels, villas, apartments and dive centres around Sharm Yanbu, following completion of a Master Plan for the area;
- Provision of a Conservation Visitor Centre on the Sharm;
- Restoration of old Yanbu with Heritage centre and small hotels;
- Scope for small hotels and eco-lodge type developments at Al Rais and Nakhil;
- Development of heritage attractions at Badr battlefield, and the Nakhil villages.

Farasan Island
- Development of high quality, dive/water sports centres, with supporting security and safety facilities, including decompression chamber;
- Small, resort hotels near to Farasan town;
- Restoration of historic houses in Farasan and provision of heritage centre;
- Provision and manning of Park Centre/Field Study centre, from revenue raised from visitor levy.

Jizan
- Small/medium sized resort development at Al Qauz/Turfah and Shuqayq;
- Scope for community tourism initiatives in the mountains, such as Fayfa;
- Further enhancement of tourist facilities in Jizan, eg the Corniche and the Turkish fort;
- Support for major Food Festivals, eg Sea Food and Fruit.

Tabuk
- Development of small resort hotels, dive centres and ecолодges along the coast, from Haql to Umm Lujji;
- Prospects for larger resort development at Sharma to follow on improvements of infrastructure;
- Community tourism initiatives in mountain region;
- Desert and mountain trails leading in from the coast.

**South Makkah/Aseer**
- Development of small/medium sized resort hotels and dive centres along coast road, including Al Birk, Al Qunfidah and Al Lith.

**Red Sea Islands**
- Study into development of floating dive platforms to allow temporary access to certain islands.

**Product Development Concepts**

Attached to this plan are outline designs and feasibility studies for a number of product concepts appropriate to the Red Sea. These are:
- A major resort
- A dive centre
- An aquarium
- An ecotourism project
- A heritage hotel
- A nature reserve visitor centre

**Action Plan**

A detailed Action Plan is provided for the next five years and covers the institutional arrangements necessary to ensure the implementation of the strategy, together with details of the timing, stakeholder involvement and resource implications. It also specifies the steps necessary for carrying out actions ranging from developing the product concepts to implementation of the Marketing Strategy and the Human Resource implications of the strategy.

**Economic Impact**

The overall economic benefit from implementation of the first five years of the tourism development programme, would be an additional 2.4 billion SAR and 15,000 additional jobs. This could exceed 60,000 additional jobs over the 20 years of the strategy.
Introduction

1.1 Background to the Current Study

The Terms of Reference for this study were clearly laid out in a Brief prepared in September 2004, and the key issues identified within it are as follows.

Tourism has been formally identified by the Council of Ministers as an important sector of the economy of Saudi Arabia. The subsequent establishment of the Supreme Commission for Tourism and its responsibility for the development and promotion of the Kingdom’s tourist industry, led to the preparation of National and Provincial Tourism Plans. The National Tourism Plan and all the Provincial Plans that bordered the Red Sea, highlighted its significance in current tourism activities but more importantly stressed its central role in securing the full potential of tourism for the nation’s future prosperity.

The need for a single development strategy for the entire Red Sea coastal zone was not only a question of reviewing and integrating the proposals emerging from the Provincial Plans, but also for ensuring that development proposals could be planned within an effective tourism and environmental planning framework. This was in response to the close relationship between tourism and the environment and the particularly sensitive and internationally important quality of the Red Sea itself.

In addition the Brief identified a number of issues that were seen as having an impact on the preparation of the study or that could benefit from proposals emerging from it. These included:

- The interdependence of tourism and environmental protection – and the opportunity where tourism can assist in efforts to establish marine protected areas;
- The increasing problem of marine pollution and reef damage – to be tackled through a combination of statutory controls, appropriate enforcement and, in particular, greater public awareness;
- Multiple jurisdiction over the coastal zone leading to confusion and wasted effort;
- Shortcomings in the management capacity of protected areas;
- The issue of whether the legislative and policy framework is sufficient;
- Security concerns – with regards to the responsibilities of the Coastguard over security and recreational issues;
- Achieving the full potential for tourism development;
- Meeting all the regional and international obligations arising from the various treaties and programmes for the Red Sea.

1.2 Spirit and Purpose of the Study

The main focus of this study is to provide a direction and framework for the development and management of tourism along the Red Sea coast of Saudi Arabia over the next twenty years. In addition a Five Year Action Plan is provided in order to initiate the work programme that is necessary in identifying and assembling the resources and partners that will be required. This Plan also needs to set out the first steps in setting up the appropriate management structure to see the programme is implemented successfully.

Such development should not only be compatible with environmental objectives and policies, but where possible help achieve a greater public understanding of the importance of the Red Sea and contribute to higher standards of environmental protection.

However it must also relate to the changing demands of the tourist markets, whether domestic or international. These demands are reflected not only in the quality of the facilities but also in the range of activities that are made available, whether water based sports or adventure or cultural tourism along the coastal zone.

The development strategy will therefore be accompanied by a detailed marketing strategy showing how the various tourism products fit the needs of key target market segments, and how these markets can be reached.
Fig. 1.1 Location of the Red Sea Tourism Strategy Area
The key outcome though is a strong message to potential investors and developers about the scale and nature of the potential that exists for tourism and recreation along the Red Sea Coast.

1.3 Study Area

The key aspect of defining the area under scrutiny within this study and to be the subject of any subsequent action, is that it extends the full length of the Saudi Arabian Red Sea coast from the border with Jordan in the north to the Yemeni border in the south. This provides a study length of around 1,840 kms.

The study brief recognised that the extent to which the area reached inland could not readily be decided by an arbitrary figure. As a guide it was accepted that a width of at least 50 kms was likely to be considered appropriate for many parts of the coastal zone, but that for different purposes the area of interest of this study would vary.

At its most extensive the future of the Red Sea coastline was of interest to the five Provinces along the coast. However there were significant parts of these provinces that would not be affected to any great degree by the nature of tourism development along the Red Sea. For example the future of the religious centres of Makkah and Medina and of summer resorts such as Taif are not of great significance and will not be considered to any great extent in this study.

Therefore boundaries have not been drawn inland for this study but the areas of involvement would be:

- Tabuk – extending inland across the mountain and desert areas towards Tabuk city itself;
- Madina – extending to the borders of the city itself and covering heritage features such as Mada'in Saleh and the Turkish railway;
- Jeddah – covering a narrower coastal strip around Jeddah itself;
- Aseer – covering the coastal strip west of the highlands
- Jizan – covering the majority of the Province
Current Tourism Situation

2.1 Introduction

An assessment of the current situation regarding tourism along the Red Sea coast is an important first step in understanding those reasons behind its recent development and an appraisal of those factors that may be relevant to its future development.

This chapter summarises the tourism situation in each of the five Provinces along the coast and then makes a brief review of the archaeological heritage resources in the Red Coast region, followed by an assessment of the current infrastructure that is available to support any future tourism development.

2.2 Makkah Province

Makkah Province is clearly the key region for religious tourism not only along the Red Sea coast but also within the KSA and, of course, for Islamic pilgrims worldwide. Jeddah has long been a major trading centre along the Red Sea coast and for the spice routes of the Arabian Peninsula, as well as for the Middle East as a whole. More recently, is Jeddah’s role within the KSA as a leisure resort given its attractive coastal location. Taif has also played a key role in the KSA’s recent history as a summer capital and mountain resort. However, it is the Province’s role as home to Islam’s holiest shrine at Makkah Al Mukarramah that is at the heart of its importance nationally and gives it an unrivalled international significance as a place of pilgrimage.

The Province has a 00km coastline along the Red Sea. A narrow coastal strip is bounded by a range of low hills that rise up to the Hijaz Mountains in the south (to a height of over 2,000 metres.). The heat and humidity of the coastal plains gives way to a more intense and drier heat further inland, except in the mountain areas where cooler conditions prevail and which provides a pleasant alternative location for visitors in summer although a deterrent to them during the winter months.

The 2002 Domestic and Outbound Tourism Survey shows the dominance of the province’s tourism sector within the KSA, with the 27 million domestic tourism visits representing 43% of the national total, whilst the 5.25 million international visitors make up 70% of the national total. The most common reason for visits to the province is religious (at 39%) although leisure trips are almost as significant (at 37%).

Tourism Resources: The province’s greatest tourism assets are its stock of tourist accommodation; its location on the Red Sea coast; and, in particular, its heritage resources, notably the holy sites at Makkah. With over 70,000 hotel rooms the Province has nearly three-quarters of the national stock and over a third of the national stock of furnished apartments.

Tourism Development Plan Proposals: The provincial plan recognises that, for the foreseeable future, tourism development will continue to be focused on the three dominant centres of Makkah, Jeddah and Taif. It seeks to reinforce the three cities and their very individual products and markets, but also aims to develop mutually-beneficial linkages between them in order to achieve a more effective allocation of resources. Makkah, Jeddah and Taif are proposed as TDA.

2.2.1 Jeddah City

Jeddah has changed rapidly from a small fishing village to a significant Red Sea trading centre and,
2. Current Tourism Situation

consequently, catering to the needs of traders, pilgrims and, more recently, tourists have been central to the life of the city for many centuries. However, holiday destinations elsewhere in the Middle East are providing Jeddah’s traditional visitors with cheaper and more leisure-orientated alternatives. Although the city still acts a gateway for pilgrims, it often benefits little from them as they are often transferred directly from the airport terminal onto buses for Makkah or Madinah.

There are pressures on the infrastructure of a fast-growing city (4.8 million in 2004) with increasing traffic congestion, air and water pollution. More importantly, Jeddah’s rapid urban development, which has been dominated by car-oriented demands and a movement away from traditional architectural styles has meant that most of the city has lost its ‘sense of place’. The corniche and the old city of Al Balad, in particular, contribute most to Jeddah’s unique sense of place and urban uniqueness.

The Provincial Tourism Plan concluded that Jeddah attracts over 12.5 million overnight visits, of which 10 million are from domestic visitors, and thus the city’s tourism is of a significant scale. It represents a very important centre for both provincial and national tourism, comprising a 40% share of the former and a 25% share of the latter. The most striking feature of Jeddah’s tourism activity is the high proportion of domestic visitors (57%) that arrive with the main purpose being ‘holiday and leisure’, together with 19% that come for the purpose of visiting friends and relatives. It is also notable that a large proportion of overseas visitors, aside of haj pilgrims, are poorer, older and from lower social classes than visit elsewhere in the province. With over a half of tourists staying with friends and relatives, this is a reflection of Jeddah’s long tradition as a leisure area, well before the city’s commercial accommodation sector was ever developed. Even now, only 33% of visitors stay in hotels and 22% in furnished apartments.

Tourist Resources: The principal natural attraction for Jeddah is its Red Sea coastline. The development of an extensive corniche during the last 20 years has included a range of resorts and amusement facilities. These provide the main attractions for leisure visitors. Diving centres and beach resorts also provide a major attraction for Jeddah, especially around the Obhur Creek area of north Jeddah. The Al Balad core of Jeddah is also a unique old city area characterised by buildings constructed of coral with their visually distinctive mashrabiyyah and roshan screens. This historic part of old Jeddah provides the city with an additional asset of international significance.

There are roughly 80 hotels in Jeddah providing around 9,600 rooms, including many of a high international standard. There is also a large stock of furnished apartments, which accounts for around a quarter of the national total. There are also good facilities for business tourism and an ever-increasing amount of good quality shopping.

Tourism Development Plan Proposals: By 2025 Jeddah, as the leading national resort and business centre, is envisaged to be able to compete with any destination in the Middle East in terms of the range and quality of its facilities for its key target markets, such as resort, cultural, shopping or business tourism. This vision focuses on the need to be aware of the standards of the tourism product and service being offered elsewhere by its main international competitors. The TDP also placed strong importance on the need for an effective planning and development control system.

The TDP recognises the need for tourism to be given sufficient priority in the emerging development policies for Jeddah that would see the city double in size over the next 20 years. It identifies the key roles for tourism within those existing and proposed new satellite centres that are proposed in the Jeddah Master Plan. One of these is the Thuwal new town that is proposed some 30kms north of Jeddah. A key issue for this new development is the need to provide appropriate policies for the coastal development zone, within which Thuwal is located.

The TDP produced project profiles (in effect development and improvement briefs) for five schemes selected for their potential to act as catalysts for tourism development in a number of strategic areas across within the city. Profiles were prepared for the Al Balad old city area, Al Khuzam Palace, the northern section of the corniche, the Obhur Creek area, and a major museum or visitor attraction.
Relevance to Red Sea Tourism Strategy (RSTS):
- The Kingdom’s main holiday resort.
- Increasing competition from foreign destinations
- Needs integrated programme of development and management to maintain this role.

2.3 Tabuk Province

There are extensive beaches along the Tabuk coast with world-renown diving locations. Further inland there are very attractive areas of mountainous terrain with distinctive rock formations that offer excellent opportunities for sightseeing and desert sports, as well as important cultural heritage attractions including Babylonian and Nabataean archaeological sites. Tabuk’s strategic location in the northwest of the KSA adjoining Jordan and close to Egypt means that it provides a gateway role from and to those countries.

Tabuk receives 1.1 million domestic visitors annually, with nearly half visiting friends and relatives (47%) and almost 40% arriving for leisure purposes. The typical length of stay is relatively short compared to other provinces with nearly three-quarters staying for less than one week. A large proportion of visitors stay in private lodgings. No statistics are available on international visitors although hotels report that 0% of guests are non-Saudi, many of which are expatriate businessmen. Tabuk City and Haql are the main destinations in the province. Visitors rate their visit to the province very highly with, according to a SCT survey, 96% of overnight visitors evaluating their stay as ‘excellent’ and ‘good’, most stating that they would visit the province again. The 'weather', the 'beaches' and the 'relaxing environment' were the main factors for this viewpoint. However, 'cleanliness on beaches', 'sanitation facilities', poor 'access' and the 'lack of entertainment, particularly for children' were singled out as areas that needed improvement.

Tourism Resources: The extensive beaches along the Tabuk coast have outstanding water quality. The marine environment is considered excellent for diving and other water sports and represents the main tourism attraction in the province. Diving locations are popular with the expatriate and, increasingly, the Saudi domestic markets. Good quality beaches are attractive to the Saudi family market. Two marine reserve areas have been identified for protection along the province’s coastline.

Inland attractions include the attractive mountainous terrain with distinctive rock formations that offer excellent opportunities for sightseeing and desert sports. Several areas are designated as existing or proposed protected areas including the Az Zaytah area in the north-west that is an extension of the popular Wadi Rum landscape in Jordan.

Important cultural heritage attractions are found in the Babylonian and Nabatean archaeological sites, as well as the numerous forts and castles, historic pilgrimage and trading routes, and the former Hijaz railway line and stations. There are also historic central districts of some coastal towns, especially the large and well preserved heritage core of Al Wajh.

Tourism Development Plan Proposals: It was proposed to position Tabuk province as a major beach and marine tourism region in the KSA which, complemented by outstanding desert scenery and cultural heritage features, would offer a wide range of leisure and adventure experiences.

The Arab, GCC, Umrah and other international markets are not spending much leisure time in Tabuk. It is therefore intended to develop the province’s coastal diving potential, good quality resorts, adventure and ecotourism opportunities and special interest packages, for instance, by promoting cultural tours in conjunction with Madinah and Jordan trips, which could attract a variety of international market segments. More specifically, joint tours could be organised with Petra in Jordan and those Nabatean sites in Madinah and Tabuk, as well as providing a transnational park incorporating Wadi Rum in Jordan and the Az Zaytah (Hisma) area west of Tabuk City.

Relevance to RSTS
- Considerable potential to link coastal zone with other attractions in the desert mountains.
- Need to overcome the image of a frontier region.
2. Current Tourism Situation

2.4 Madinah Province

As a primary destination for religious worship, the city of Madinah receives a high number of both domestic and international visitors. In 2002, the province attracted more than 5.6 million domestic visitors, of which 3.5 million came for hajj, umrah and ziarah and nearly one million for leisure and holidays. Madinah City is by far the main destination receiving 90% of the province’s visitors. The coastal city of Yanbu attracts half a million visitors annually. The province mostly attracts the family market, both for religious observance and for leisure. The average length of stay is 6.2 nights.

Overseas visitors account for nearly 3.5 million tourists with the great majority coming for hajj (1.3 million) and umrah (1.7 million). Over 50% of overseas umrah visitors are from Egypt, Iran and Pakistan. According to umrah operators some extension programmes have been organised, although there are complaints that the new regulations adopted in 2002 are still not consistently implemented and that the procedures are bureaucratic and not well understood by all authorities.

International visitors not traveling to Madinah for religious purposes account for roughly 250,000 visitors and are attracted to the cultural assets of the province, in particular Mada’in Saleh and Al Khuraibah near Al Ula. The beach resorts and the diving, sailing and fishing opportunities at Yanbu attract some expatriate visitors. However, since the events of September 11, 2001 international tourists on the Discover KSA programme have virtually disappeared. However, some international visitors travel to Madinah City and Yanbu for business purposes.

Tourism Resources: Madinah City contains globally important Islamic sites, notably the Prophet’s Mosque and several other historic mosques. There are significant archaeological and historic sites, particularly in the Al Ula area with its Nabatean site of Mada’in Saleh, the early Islamic ruins of Old Al Ula and the Hijaz railway station and yards. Mada’in Saleh is to be proposed as a World Heritage site. Overall, Al Ula is considered as the premier cultural heritage area in the KSA. The Al Khuraibah area also has sites of the Dedan and Liyan civilizations and there are important ruins at Khaybar. There are excellent beach and marine resources, especially for water sports and diving, in the Yanbu and Ar Rayis areas. There are also many areas of scenic beauty in the province that combine mountainous and desert landscape. A modern industrial city has been developed at Yanbu.

Tourism Development Plan Proposals: The TDP envisages that Madinah would continue to be a major tourism region in Saudi Arabia and a religious destination of global significance, with other tourism attractions being developed in a sustainable manner. It is intended that the province will promote the diversification of the tourism sector according to a broad range of tourism products. This would require expanding visitor capacities for key Islamic sites and the developing cultural heritage, beach, marine and nature tourism in a variety of locations. The intention is to extend the length of stay of the hajj and umrah visitors.

Relevance to RSTS:
• The potential of Sharm Yanbu as a major resort area.
• Links can be made with the culture of the coastal zone and inland towards Madinah and the Turkish railway.

2.5 Aseer Province

The province has a range of tourism attractions that include very attractive mountains landscapes combined...
with interesting flora and fauna, and complemented with coastal and marine resources. In addition, there are important archaeological and historic sites, as well as interesting traditional architectural styles found in several villages and urban areas. Resources related to other aspects of culture include museums, cultural villages and the Abha Summer Festival. Aseer experiences cooler summer temperatures than other parts of the KSA. Abha is the main city, gateway and staging point for visitors.

In 2002, there were nearly 4.3 million domestic tourist trips and 340,000 day trips to Aseer Province. Foreign visitors accounted for 5% of total arrivals, principally from Kuwait and the other GCC countries. Nearly 60% of tourists traveled to Aseer for leisure purposes and 35% to visit friends and relatives. According to an SCT survey, visitors are attracted to Aseer because of the scenic beauty and its pleasant temperatures, and 80% were found to be satisfied with their visit. However, visitors experienced high prices and complained about the lack of guides and tourist information centres as well as entertainment.

The family market is by far the dominant market and is expected to remain so in the near future. The holiday behaviour of this market is dictated by school breaks and, consequently, tourism in Aseer suffers from strong seasonality patterns with the peak season in summer, when the climate is cool relative to the high temperatures on the lowlands. Sports and adventure tourism is also becoming established in Aseer with possibilities for rock climbing, paragliding, mountain biking and hiking in the mountains and in the desert, as well as diving and snorkeling along coastline locations.

Tourism Development Plan Proposals: The TDP envisages that the province will continue to develop tourism according to its natural and cultural heritage resources. It recommends that more direct air flights be established from Aseer to GCC countries in order to attract more visitors from those countries. Tourism development and marketing must be coordinated with Al Baha and Jazan provinces.

Relevance to RSTS:
• Limited connections to the Red Sea zone at present.
• Scope to strengthen its role as a summer resort by improving such links.

2.6 Jazan Province

Jazan Province suffers less from seasonality than other coastal provinces, such as Aseer. There is good occupancy of accommodation all year round with weekend tourism during both the winter and summer months at coastal resorts, visiting friends and relatives’ tourism and also a strong weddings market, as well as from transit visitors on the way to and from Yemen. The province offers a variety of activities that includes water sports in the Farasan Islands and along the coast; attractive mountainous scenery in Fayfa; cultural activities such as tours of historical attractions, visits to ethnic communities, traditional markets and festivals; special interest activities such as bird watching and turtle viewing; and adventure tourism in the Al Qahar and Al Mawt mountains. In the future, it is expected that health spa tourism will become a major attraction in the province.

According to SCT research, there were nearly 1.8 million domestic tourist trips and 242,000 day-trips to Jazan in 2002. Visitors mostly arrived from Abha, Khamis Mushayt, Jeddah, Riyadh and Madinah. The main purpose of travel for 35% of visitors was to see friends and relatives, and for 37% it was leisure.

There is a strong weekend family market in winter from Abha and Khamis Mushayt, especially for the beach resorts. Spa tourism could be a product of the future for this market. Jazan has good potential for attracting the domestic youth market, particularly to enjoy water sports such as diving, snorkeling, jet and water skiing, parasailing, fishing and sailing. These may also be attracted by adventure and sports tourism in the mountains (camping, trekking, hiking, and mountain biking).

The Farasan Islands are a great asset for the province and are attracting an increasing number of divers.
2. Current Tourism Situation

Although expatriates currently make up 85% of divers to the islands, this is a growing activity in Saudi Arabia with 4,000 licenses issued every year in the KSA. Once fully developed, this sport will also be of interest to the GCC and Arab markets as well as the international market.

The plan identified the potential for a sailing market to the Farasan Islands; national and international special interest markets for bird watching, architecture and cultural heritage including ethnic culture; a rural tourism market in the Fayfa area; a cruise market (domestic and international); an adventure sports market to the mountains (domestic youth and expatriates) and the beach and the relaxation market (for domestic, GCC, other Arab and to a lesser extent umrah plus visitors) to resorts in Shuqayq, Murjan, At Turfah, Baysh, and Farasan.

Tourism Resources: The province's principal resource potential lies in the Farasan Islands with its many islands, reefs, beaches and protected water areas that offer excellent opportunities for diving, sailing, beach recreation and other water sports activities. Although the coral and marine life are not as diverse as in the northern part of the Red Sea, the Farasan reefs are known for their pristine condition and variety of dive areas. The Farasan Islands have been designated as a Marine Protected Area. The coastal beaches on the mainland also provide potential for developing beach resorts.

The mountain scenery in the north east of the province provides a contrasting attraction to the beach and marine resources. They have a distinctive cultural landscape with a dense settlement pattern of modern and traditional houses and agricultural terraces. Some hot spring sites have been identified as opportunities for developing spa tourism. Also of interest is the cultural heritage of archaeological, historic and architectural sites, traditional markets and cultural patterns of several ethnic groups. Special interest features are the diverse bird life, unique species of gazelles, turtle nesting on several beaches, and some local festivals. Present tourism development is rather limited although some beach resorts and hotels exist and a diving operation has started in the Farasan Islands.

Tourism Development Plan Proposals: The TDS envisages that Jazan Province will become a major beach, marine and spa tourism destination in Saudi Arabia, complemented by mountain and cultural heritage tourism. Regional relationships, especially with the neighbouring province of Aseer, are important in terms of product development and markets and eventually Jazan could attract more visitors some tourists from Yemen.

The plan has focused on developing beach and marine tourism with an expansion of dive operations, especially in the Farasan Islands, during the short to medium term in tandem with spa tourism and urban tourism in Jizan City. Bird watching and turtle viewing could also be developed during the near term. In the longer term, the Fayfa mountain area is envisaged for tourism product development. The overall aim is to extend the length of stay for visitors.

Relevance to RSTS
- Specialist markets such as diving, spa tourism, mountain tourism, plus sites suitable to medium scale resort development.
- Need for improved infrastructure e.g. air service to Farasan Islands.

Fig. 2.1 Provincial Boundaries
2.7 Cultural Heritage

Although cultural heritage has been considered in each of the Provincial Tourism Plans it is important for this study to draw out those sites and themes important in the context of the Red Sea Coastal zone as a whole.

The cultural heritage of the Red Sea coastal zone can be analysed and developed under several categories, that are based on:

- the significance of the sites
- the interest they represent to the target visitor market
- accessibility
- present condition and future development options

The following categories have been identified:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary/must-see</td>
<td>Sites of global significance and likely destinations for significant number of visitors. Visitors willing to travel to see the site.</td>
</tr>
<tr>
<td>Religious/primary</td>
<td>Religious sites that most Muslim visitors know about and will visit during their stay in the Kingdom.</td>
</tr>
<tr>
<td>Religious/secondary</td>
<td>Religious sites that are less well known, or less easily accessible and will only be visited by some Muslim visitors to the Kingdom. Visitors may know of the significance of the site but not be aware that it can be visited.</td>
</tr>
<tr>
<td>Secondary</td>
<td>Sites that are historically and culturally significant but are less well known. Unlikely to warrant a special journey to visit them, but can be combined with other activities. Visitors might not be aware of their presence, and may visit them if they are in the area and easily accessible.</td>
</tr>
<tr>
<td>Special interest</td>
<td>Sites that are more likely to be of interest to special interest groups and are less easily accessible.</td>
</tr>
<tr>
<td>No-go</td>
<td>Sites that are historically and culturally significant, but are in too fragile a condition to allow visitor access at this time.</td>
</tr>
</tbody>
</table>

Access refers to good road conditions, proximity to centres or places where visitor accommodation exists and permitted entry.

Alongside these categories that can be attributed to monuments and sites, strategically the two following characteristics of the cultural heritage are considered:

- It is linear in many respects, or can be linked. (e.g. The pilgrim and other cultural routes; forts or historic towns of the Red Sea Coast; sites relating to the life of the Prophet (PBUH) etc.)

The wealth of handicrafts, traditions, soft culture (intangible heritage), especially of the Hijaz, combining coastal maritime and inland desert cultures, can be better utilised and developed to provide ‘added value’ to the overall visitor experience, not only cultural tourism.

The following tables drawing on material collected for the National and Provincial Tourism Plans identify the tourism significance of:

- Archaeological sites
- Castles, forts and palaces
- Sites related to the life of the Prophet (PBUH)
- Historic Towns
- Museums
2. Current Tourism Situation

<table>
<thead>
<tr>
<th>Site</th>
<th>Location</th>
<th>Province</th>
<th>Description</th>
<th>Tourism value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Al Badh</td>
<td>Haql</td>
<td>Tabuk</td>
<td>none found</td>
<td>Low</td>
</tr>
<tr>
<td>Qaryah</td>
<td>Tabuk</td>
<td>Tabuk</td>
<td>?</td>
<td>Low</td>
</tr>
<tr>
<td>Tayma</td>
<td>Inland 300+km from Tabuk</td>
<td>Tabuk</td>
<td>Mixed period site dating back to the prehistoric period, also linked to Mesopotamian civilisations Special interest</td>
<td>Low</td>
</tr>
<tr>
<td>Madyan Maghabir Shuaib</td>
<td>Coastal road north of Dhuba</td>
<td>Tabuk</td>
<td>Stone cut tombs from the Nabatean period. Smaller and not as impressive as those at Mada'in Saleh. Part of Al Badh (al Bid) archaeological area.</td>
<td>Secondary</td>
</tr>
<tr>
<td>Ain Aynaunah</td>
<td>Off coastal road north of Dhuba</td>
<td>Tabuk</td>
<td>Natural spring oasis and associated water system from the Nabatean period and Roman occupation</td>
<td>Low</td>
</tr>
<tr>
<td>Al Disah</td>
<td>Dhuba environs</td>
<td>Tabuk</td>
<td>Cemeteries dating from Nabatean and later periods</td>
<td>Low</td>
</tr>
<tr>
<td>Shwaq Shaghib</td>
<td>Dhuba environs</td>
<td>Tabuk</td>
<td>Old oasis and settlement known to date back to 1st century BC, and Shwaq Palace from the Early Islamic period</td>
<td>Low</td>
</tr>
<tr>
<td>Thalimat al Zarayb</td>
<td>Inland from Al Wajh</td>
<td>Tabuk</td>
<td>Pre-Islamic and more recent petroglyphs and inscriptions on rock face overlooking a well</td>
<td>Low</td>
</tr>
<tr>
<td>Al Huwaytat</td>
<td>Inland from Al Wajh</td>
<td>Tabuk</td>
<td>Ancient mining site</td>
<td>Low</td>
</tr>
<tr>
<td>Al Mutakhaba</td>
<td>Inland from Al Wajh</td>
<td>Tabuk</td>
<td>Ancient mining site</td>
<td>Low</td>
</tr>
<tr>
<td>Um Grayat</td>
<td>Inland from Al Wajh</td>
<td>Tabuk</td>
<td>Ancient gold and precious stone mining site visited by Strabo in the 1st century BC. Some mining has continued in the time of Al Saud.</td>
<td>Low</td>
</tr>
<tr>
<td>Karakoma (also known as Al Corcoma or Al Murans)</td>
<td>40km south of Al Wajh on the coast</td>
<td>Tabuk</td>
<td>Remains of a Nabatean settlement, temple and paved road. The site is mentioned in classical sources describing the expeditions of the Roman governor to Arabia in 24/25 BC. Also remains are found on offshore island of Sheikh Murbat.</td>
<td>Secondary</td>
</tr>
<tr>
<td>Sharm Al Antar</td>
<td>Al Wajh, coast</td>
<td>Tabuk</td>
<td>Bay containing pilgrim road cisterns and wells from the Mamluk period and Abbasid period port.</td>
<td>Low</td>
</tr>
<tr>
<td>Al Hawra</td>
<td>5km north of Umluj</td>
<td>Tabuk</td>
<td>Islamic period town</td>
<td>Low</td>
</tr>
<tr>
<td>Mada'in Saleh</td>
<td>Inland, near Al Ula</td>
<td>Madinah</td>
<td>This Nabatean site of more than 100 dispersed rock cut tombs is on the Kingdoms list for designation as a World Heritage Site. It is also an important religious site for Muslims and an event that took place there is referred to in the Holy Qur'an. Conservation need identified.</td>
<td>Must see destination of international significance and interest. The site is open to tourists but there are no interpretive or other visitor facilities developed. Entry permits are required for foreign visitors.</td>
</tr>
<tr>
<td>Mount Ethlib</td>
<td>near Mada'in Saleh, Al Ula</td>
<td>Madinah</td>
<td>Related to Mada'in Saleh the site consists of carved niches in the rocks with decorations and religious symbols in the Nabatean style</td>
<td>Primary</td>
</tr>
</tbody>
</table>

Table 2.2 Archaeological Sites
Table 2.2 Archaeological Sites (continued)

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Location</th>
<th>Description</th>
<th>Accessibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Al Khuraibah</td>
<td>near Mada’in Saleh, Al Ula</td>
<td>An important site of the Kingdom of Dedan and Lihyan that contains tombs carved into the mountainside and bearing ancient inscriptions. The best known are the &quot;Lion Tombs&quot;. Other remains include a circular cistern that may have been part of a temple. Excavations are currently underway at the site.</td>
<td>Primary Linked to a visit to Mada’in Saleh Requires interpretive and other visitor facilities</td>
</tr>
<tr>
<td>Ekmah Mountain</td>
<td>near Mada’in Saleh, Al Ula 2.5 km from Al-Khuraibah</td>
<td>The site contains several historic rock engravings in a scenic natural setting. Ancient inscriptions are also found in other places in the area.</td>
<td>Secondary Linked to a visit to Mada’in Saleh Requires interpretive facilities</td>
</tr>
<tr>
<td>Al Bint Dam</td>
<td>Khuraybah area</td>
<td>Partially intact historic dam</td>
<td>Secondary Link to visits to Khuraybah and Mada’in Saleh</td>
</tr>
<tr>
<td>Al Haseed Dam</td>
<td>Khuraybah area</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Al Zubaydah Dam</td>
<td>Khuraybah area</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Al Jar</td>
<td>on coast about 20 km north of Ar Rayis in the Ras Al’buraikah area</td>
<td>Located on the sea it is the site of an early Islamic seaport that served Madinah. Unexcavated.</td>
<td>Low Of interest once excavated and interpreted</td>
</tr>
<tr>
<td>Okaz</td>
<td>Taif (inland)</td>
<td>Pre-Islamic market, exact location unknown until more excavations are carried out</td>
<td>Low</td>
</tr>
<tr>
<td>Al Samallaqi Dam</td>
<td>South of Taif (inland)</td>
<td>Possibly prehistoric dam, linked to irrigation and other dams in the surrounding valleys</td>
<td>Special interest Could be linked to agro or eco-tourism developments</td>
</tr>
<tr>
<td>Al Moasim Dam</td>
<td>Mina (inland)</td>
<td>Dam and water system linked to the pilgrim route</td>
<td>Low</td>
</tr>
<tr>
<td>Thi Majaz market</td>
<td>Mekkah – Aisail road (Kara souq)</td>
<td>Pre-Islamic site where tribes used to gather</td>
<td>Low</td>
</tr>
<tr>
<td>Sireen in Al Lith</td>
<td>Al Lith</td>
<td>Former stopping point on the coastal Yemeni trading route</td>
<td>Low</td>
</tr>
<tr>
<td>Olaya Palace</td>
<td>Rabigh district</td>
<td>Stone built palace probably from the Abbasi period</td>
<td>Low</td>
</tr>
<tr>
<td>Al Aridah</td>
<td>West of Al Hamerah</td>
<td>Burial chambers with some carved stones and petroglyphs. Unexcavated</td>
<td>Low</td>
</tr>
<tr>
<td>Jizan Aoloya</td>
<td>Abu Arish, inland</td>
<td>Pre-Islamic, unexcavated site Possibly the remains of the earliest civilisation to have settled in this part of Arabia</td>
<td>Low at present time</td>
</tr>
<tr>
<td>Grayn</td>
<td>Farasan Islands</td>
<td>Pre-Islamic</td>
<td>Low</td>
</tr>
<tr>
<td>Al Qarya</td>
<td>Farasan Islands</td>
<td>Pre-Islamic</td>
<td>Low</td>
</tr>
</tbody>
</table>
### 2. Current Tourism Situation

#### Table 2.3 Castles, Forts & Palaces

<table>
<thead>
<tr>
<th>Site</th>
<th>Location</th>
<th>Province</th>
<th>Description</th>
<th>Tourism value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Al Hajj Castle</td>
<td>Halit Ammar, inland on Jordanian border, start of Hijaz Railway in Saudi Arabia</td>
<td>Tabuk</td>
<td>Small fort next to the railway station</td>
<td>Special interest; Only if linked with the Hijaz Railway; Access can be a problem</td>
</tr>
<tr>
<td>King Abdul Aziz Palace</td>
<td>Haql Town</td>
<td>Tabuk</td>
<td>Built in the time of King Abdulaziz and currently in poor condition</td>
<td>Low; But might be if utilised as a Museum or visitor centre</td>
</tr>
<tr>
<td>Tabuk Fort</td>
<td>Tabuk City</td>
<td>Tabuk</td>
<td>Ottoman fort restored in the time of King Abdulaziz and more recently.</td>
<td>Secondary; In heart of commercial centre. Has potential to be utilised as a traditional restaurant or visitor centre.</td>
</tr>
<tr>
<td>Al Motham Castle</td>
<td>Inland from Tabuk</td>
<td>Tabuk</td>
<td>Castle in desert, off road and not in close proximity to a settlement.</td>
<td>Low, due to access difficulties</td>
</tr>
<tr>
<td>Al Khadhir Castle</td>
<td>Inland from Tabuk (?</td>
<td>Tabuk</td>
<td>Ottoman period fort</td>
<td>Low</td>
</tr>
<tr>
<td>Al Muweilah Fort</td>
<td>North of Dhuba on the coast</td>
<td>Tabuk</td>
<td>Ottoman period fort and caravansera</td>
<td>Secondary; High if developed for tourism purposes and combined with a coastal tourism or resort</td>
</tr>
<tr>
<td>Dhuba Fort</td>
<td>Dhuba Town</td>
<td>Tabuk</td>
<td>Recently restored fort</td>
<td>Secondary; If developed with historic town and used as museum or visitor centre</td>
</tr>
<tr>
<td>Souq Castle</td>
<td>Al Wajh Town</td>
<td>Tabuk</td>
<td>Ottoman period</td>
<td>Secondary; If developed with historic town and used as museum or visitor centre</td>
</tr>
<tr>
<td>Al Azlam Castle</td>
<td>Al Wajh environs?</td>
<td>Tabuk</td>
<td>Mamluk period; In poor condition</td>
<td>Low; Not linked to other sites of tourism interest</td>
</tr>
<tr>
<td>Al Zureeb Castle</td>
<td>Approx. 10km inland from Al Wajh Town</td>
<td>Tabuk</td>
<td>Ottoman period caravansera and fort</td>
<td>Medium/low; If developed in combination with the pilgrim route</td>
</tr>
<tr>
<td>Fort</td>
<td>Madain Saleh, Al Ula</td>
<td>Madinah</td>
<td>Near to the Nabatean tombs of Madain Saleh, the small Islamic fort, which was a place where pilgrims rested on their way to the Hajj. The Madain Saleh station and associated yards of the Hijaz Railway is next to the fort</td>
<td>Primary; Linked to Madain Saleh</td>
</tr>
<tr>
<td>Alqumoos Fort</td>
<td>Khaybar-Madinah to Madain Saleh route</td>
<td>Madinah</td>
<td>Imposingly situated on a flat hill top and extended over several periods, the fort was also restored and used for government offices, but it is now in ruins.</td>
<td>Religious secondary; Of significance to Muslims as site of battle; On route from Madinah to Madain Saleh and modern day overland pilgrim routes</td>
</tr>
<tr>
<td>Albazza Fort</td>
<td>Khaybar area</td>
<td>Madinah</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Naim Fort</td>
<td>Khaybar area</td>
<td>Madinah</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Alnatat Fort</td>
<td>Khaybar area</td>
<td>Madinah</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Alsaab bin Moath Fort</td>
<td>Khaybar area</td>
<td>Madinah</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Alsalam (Salaleen) Fort</td>
<td>Khaybar area</td>
<td>Madinah</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Alswateh Fort</td>
<td>Khaybar area</td>
<td>Madinah</td>
<td></td>
<td>Low</td>
</tr>
</tbody>
</table>
Alzeemah Fort | Close to Makkah city | Makkah | From time of the first Saudi State | Low

Asfan Castle | Makkah | Makkah | Ottoman castle built as a watchtower to protect caravans coming from Sham and Turkey. | Low

Khulais Castle | Makkah | Makkah | Ottoman stone castle larger than Asfan castle | Low

Nisab Mountain Castle | Muhayil Area, inland | Asir | Ottoman Fort and associated settlement, close to paved road | Low

Qasr Dar Al Naar | Abu Arish, inland | Jizan | Ottoman Fort in need of restoration | Medium/Low

Qasr Al Dosaryah | Jizan City | Jizan | Ottoman Fort, under Ministry of Defence ownership in need of conservation | Secondary

Ottoman Fort | Samtah, inland furthest point south and close to Yemen border | Jizan | Fort also used as regional headquarters during period of King Abdulaziz. Only west front remains | Low

Turkish Castle | Farasan | Jizan | Ottoman castles in need of conservation | Low

Table 2.4 Other Historic Sites related to the life of the Prophet (PBUH)

<table>
<thead>
<tr>
<th>Site</th>
<th>Location</th>
<th>Province</th>
<th>Description</th>
<th>Tourism value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Madinah</td>
<td>Madinah City, outskirts</td>
<td>Madinah</td>
<td>Location of a battle site from the time of the Prophet (PBUH)</td>
<td>Secondary religious</td>
</tr>
<tr>
<td>Khandaq</td>
<td>Madinah City</td>
<td>Madinah</td>
<td>Location of a battle site from the time of the Prophet (PBUH)</td>
<td>Secondary religious</td>
</tr>
</tbody>
</table>
| Badr | Close proximity to coast | Madinah | This religious site associated with the Prophet (PBUH) occupies about 45 square kms and includes the graves of martyrs as well as several hills mentioned in the Holy Qur’an. | Secondary religious
| Hijra route | inland | Madinah/ Makkah | Route taken by the Prophet (PBUH) and his followers on the flight from Makkah to Madinah | Special interest
| Makkah | Makkah | Makkah | Holy City | Primary religious |
| Jebel Al Rahma at Arafat | 20km from Makkah | Makkah | The residence of hajjis after Makkah and Mina. | Primary religious |
| Mina | Makkah environs | Makkah | Hajjis gather in Mina as part of the Hajj ritual | Primary religious |
| Muzdalifah | Makkah environs | Makkah | Located between Mina and Arafat, is also known as the gathering places, Jamia, as hajjis gather there as part of the Hajj ritual | Primary religious |
| Jebel Al Thor | Makkah environs | Makkah | The Prophet Mohammed (PBUH) and his companion Abu Bakr Al Siddiq hid in a cave in this mountain during their flight (Hijra) to Medina. | Secondary religious |
| Jebel Al Noor | Makkah environs | Makkah | It is the location of the Hira cave where the Prophet Mohammed (PBUH) received the first calling of Gabriel and prayed. | Secondary religious |
## Table 2.5 Historic Towns

<table>
<thead>
<tr>
<th>Site</th>
<th>Location</th>
<th>Province</th>
<th>Description</th>
<th>Tourism value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tabuk City</td>
<td>inland, linked to airport</td>
<td>Tabuk</td>
<td>Historic souq area around the fort and mosque.</td>
<td>Secondary / Secondary religious &lt;br&gt; As a starting point for visits around the region Will be of interest if sites are conserved and made accessible</td>
</tr>
<tr>
<td>Dhuba</td>
<td>coast</td>
<td>Tabuk</td>
<td>Remaining historic buildings surrounding the restored fort.</td>
<td>Secondary</td>
</tr>
<tr>
<td>Al Wajh</td>
<td>coast</td>
<td>Tabuk</td>
<td>Surviving historic quarter with residential, commercial and administrative sectors. Mostly abandoned, but some buildings still in use.</td>
<td>Secondary Will be attractive for tourism if buildings are sensitively restored and used again</td>
</tr>
<tr>
<td>Al Ula</td>
<td>inland</td>
<td>Madinah</td>
<td>The old town, the presence of which dates from the 13th century, contains highly interesting traditional buildings and town patterns including second story building crossovers above the narrow streets. Some buildings incorporate carved and inscribed stones from the Al-Khuraibah ruins</td>
<td>Primary Linked to Mada'in Salah</td>
</tr>
<tr>
<td>Khayber</td>
<td>inland</td>
<td>Madinah</td>
<td>Abandoned oasis settlement, fort and mosque</td>
<td>Secondary Linked to battle of Prophet Mohammed (PBUH) and Ali’s Mosque</td>
</tr>
<tr>
<td>Umluj</td>
<td>coast</td>
<td>Tabuk</td>
<td>Old imara and remaining historic buildings in the area. In danger of disappearing if no action is taken.</td>
<td>Secondary</td>
</tr>
<tr>
<td>Yanbu</td>
<td>coast</td>
<td>Madinah</td>
<td>Al Soor historic district of traditional buildings and a souk. The area is badly deteriorated and requires restoration soon.</td>
<td>Secondary Will be attractive for tourism if buildings are sensitively restored and used again</td>
</tr>
<tr>
<td>Madinah City (old town)</td>
<td>inland</td>
<td>Madinah</td>
<td>The Agrawat quarter that surrounded the Holy Mosque has been demolished to make way for new developments.</td>
<td>Low No access to non-Muslims Madinah nevertheless remains an important centre for Muslim visitors</td>
</tr>
<tr>
<td>Jeddah (Al Balad)</td>
<td>Jeddah (coastal)</td>
<td>Makkah</td>
<td>The Al Balad quarter is without doubt, the most outstanding and the best preserved historic quarter in the Kingdom. The port and gateway to the Holy Makkah, it is a city of distinctive Arab character, it is characterised by the multi-storey merchants’ houses built of teak and coral stone.</td>
<td>Must-see destination</td>
</tr>
<tr>
<td>Makkah (old town)</td>
<td>inland</td>
<td>Makkah</td>
<td>Little remains of the historic core of Makkah.</td>
<td>Low The city itself and the Holy Mosque are the focus of the Hajj</td>
</tr>
<tr>
<td>Taif</td>
<td>inland</td>
<td>Makkah</td>
<td>Although the historic centre and old walled town has been replaced by new developments, the Al Gazzaz souq remains as do a number of outstanding private properties and summer houses.</td>
<td>Secondary</td>
</tr>
<tr>
<td>Al Qunfuda</td>
<td>coastal</td>
<td>Makkah</td>
<td>Little remains of the historic quarter or traditional residential dwellings</td>
<td>Low</td>
</tr>
</tbody>
</table>
### Table 2.5 Historic Towns (continued)

<table>
<thead>
<tr>
<th>Town</th>
<th>Location</th>
<th>Type</th>
<th>Features</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rabigh</td>
<td>coastal</td>
<td>Makkah</td>
<td>Remains of a small tower from the Ottoman period</td>
<td>Low</td>
</tr>
<tr>
<td>Rij Al Alma</td>
<td>Hilly Tihamah area what distance from coast</td>
<td>Asir</td>
<td>Restored stone tower houses and museum. Complex of around 60 buildings.</td>
<td>Secondary</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Abha</td>
<td>Inland what distance from coast??</td>
<td>Asir</td>
<td>Access from the coast might be problematic</td>
<td></td>
</tr>
<tr>
<td>Sahya</td>
<td>inland</td>
<td>Jizan</td>
<td>Old military barracks (As Arissa) and old Amarah (Qasr Balad) of interest</td>
<td>Low</td>
</tr>
<tr>
<td>Abu Arish</td>
<td>Inland from Jizan City towards Yemen border</td>
<td>Jizan</td>
<td>Best known for three mosques from the Ottoman period</td>
<td>Low</td>
</tr>
<tr>
<td>Jizan City</td>
<td>coastal</td>
<td></td>
<td>Little remains of the old town</td>
<td>Low</td>
</tr>
<tr>
<td>Farasan Town</td>
<td>Farasan island</td>
<td>Jizan</td>
<td>Small settlement of historic buildings influenced in style and workmanship by India and other trading communities</td>
<td>Secondary</td>
</tr>
</tbody>
</table>
## Table 2.6 Museums (cultural heritage)

<table>
<thead>
<tr>
<th>Museum</th>
<th>Location</th>
<th>Province</th>
<th>Description</th>
<th>Tourism value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ta'yma Museum</td>
<td>Ta'yma</td>
<td>Tabuk</td>
<td>Standard Museum design displaying information and artefacts from archaeological sites in and around Ta'yma</td>
<td>Special interest Linked to archaeological sites in the area. Considerable distance to a major centre or other attractions is a major constraint.</td>
</tr>
<tr>
<td>Al Ula Museum</td>
<td>Al Ula</td>
<td>Madinah</td>
<td>Standard Museum design displaying information and artefacts from Mada'in Saleh and other archaeological sites in around Al Ula</td>
<td>Primary Linked to the sites</td>
</tr>
<tr>
<td>Khuzam Palace</td>
<td>Jeddah</td>
<td>Makkah</td>
<td>The former palace of King Abdul Aziz, has been organised as the regional museum</td>
<td>Secondary If improved and the area developed could become an important cultural attraction</td>
</tr>
<tr>
<td>Al Tayibat City Museum</td>
<td>Jeddah</td>
<td>Makkah</td>
<td>A private museum containing a vast array of displays of cultural heritage artefacts.</td>
<td>Special interest The museum has potential to be developed, particularly given its location</td>
</tr>
<tr>
<td>Al Balad Museum</td>
<td>Jeddah</td>
<td>Makkah</td>
<td>Small museum in Municipality building.</td>
<td>Limited interest, link to visit to Al Balad</td>
</tr>
<tr>
<td>Beit Nasif</td>
<td>Jeddah</td>
<td>Makkah</td>
<td>A distinguished Jeddah house that is opened to the public as a museum, managed by the Old Jeddah Historic Preservation Department</td>
<td>Primary Starting point for visiting Al Balad</td>
</tr>
<tr>
<td>Islamic Museum</td>
<td>Makkah city</td>
<td>Makkah</td>
<td>Formerly known as the King Abdul Aziz in Zahir Palace, the recently restored building includes displays on the history of Makkah and the Holy Mosque</td>
<td>Primary</td>
</tr>
<tr>
<td>Haramain Museum</td>
<td>Makkah city (out of city centre)</td>
<td>Makkah</td>
<td>Affiliated to the General Presidency of the Holy Mosque Affairs, the Haramain Museum consists of displays on the history of the Holy Mosque and its development over time.</td>
<td>Primary</td>
</tr>
<tr>
<td>Shubra Palace Museum</td>
<td>Ta'if</td>
<td>Makkah</td>
<td>Old merchants house that is restored and used open to the public as a regional museum.</td>
<td>Secondary</td>
</tr>
<tr>
<td>Qasr Shaddah Museum</td>
<td>Abha (inland)</td>
<td>Asir</td>
<td>Restored palace</td>
<td>In conjunction with visiting Abhasee Historic Towns</td>
</tr>
<tr>
<td>Traditional crafts museum</td>
<td>Rijal Al Ma'a (inland)</td>
<td>Asir</td>
<td>Part of the restored buildings, displaying traditional dress, weapons and local crafts</td>
<td>Secondary in conjunction with visiting Rijal Al Ma’a see Historic Towns</td>
</tr>
</tbody>
</table>
2.8 Infrastructure Provision

Transport

Road

Makkah Province, with its good quality national motorway linkages, and high level of expressway standard roads, has the most developed road infrastructure of all of the Provinces, and particularly around Jeddah. This is a result of the strategic importance of Jeddah as a gateway for both freight and visitors through the KAIA and the Islamic Port of Jeddah, and the importance of facilitating easy access to the City of Makkah during Hajj.

The other four Provinces all have some sections of roads that are of expressway standards, with further sections to be improved to expressway standards in the near future. Some of these have strategic importance in terms of tourism, such as the up-grading of Route 5 in several of the Provinces to expressway standard; improvements to route 80 that are designed to reduce travel time between Tabuk City and the coastal areas of the Province; and the proposed improvements to the road from Al Haqu to the Lajab Valley area that could provide a scenic loop tour through the mountains.

The expressway-standard roads need to be supported by good quality local road networks that lead to the resorts and destinations. However, the current state of this supplementary network is considered to be a key constraint to tourism development along the Red Sea Coast, particularly in the provinces of Tabuk, Jazan and Asir.

The safety of roads within the southern Provinces of Jazan and Asir are an especial cause for concern with damaged roads from hazards such as flooding posing potential risks and dangers to travelers. Plans are being implemented to rectify this situation.

Overall, the proposed investment in road improvements is considerable (SAR 4 billion in Jazan Province alone), and any increase and improvements in the current road systems will undoubtedly help ease traffic flow of visitors to and around the key destinations. It will be important to monitor the effectiveness of these networks, and to ensure that there is a level of consistency on all roads in terms of surface, safety and directional routing.

Air

Air travel is growing in its importance from both an international and domestic perspective, with air travel in real terms becoming more affordable, and therefore allowing quick and convenient movement of visitors to their destination.

Saudi Arabia has three international airports. The only one situated close to the Red Sea is the King Abdul Aziz International Airport (KAIA) in Jeddah. With a current level of 12 million passengers, and with a predicted 15 million passengers by 2010, this airport is the largest international gateway into the Kingdom. Altogether, there are five regional airports that support the five Provinces of the Red Sea coast, and a further two domestic (local) airports. Some of the Regional airports within the Red Sea Provinces can accept international flights, with Tabuk and Jazan Regional Airports having the capacity to cater for small numbers of larger jet planes such the B-747’s and Airbuses. However, additional capacity for international flights is constrained by a current lack of docking facilities at regional airports.

The majority of the regional airports are expected to grow in terms of passenger numbers, with air travel overall predicted to grow within the Kingdom. This will
2. Current Tourism Situation

require investment to improve standards and certain facilities as the airports are of varying quality; Tabuk airport for example lacks comfort lounges and VIP areas, or space to allow for car hire facilities. Tabuk, Abha (Asir Province) and the Prince Mohammad Ibn Abdulaziz regional airport at Madina are all subject to proposed development plans that aim to improve amenities at these airports. However, it will be important to encourage all airports to develop the necessary facilities and services to cater for new and increased volumes of planes and passengers, and in particular should concentrate on providing effective check-in processes; ensuring waiting zones are comfortable; baggage handling and collection points are effective and accessible; and that security checks are in place.

Ultimately the SRO has ambitions to extend the rail links both along the northern expanse of the Red Sea Coastline to Duba and Tabuk from Medinah; and along the southern reaches of the coastline to Jazan. Although a long-term vision, this expansion programme could assist in opening up certain areas of the Red Sea to new visitors.

Fig. 2.3 Red Sea Airports - international, national & local

Rail

There is no rail transport in the western Provinces at present. The Saudi Rail Organisation (SRO) is in the process of rectifying this situation through the development of the Landbridge Project. This development will link the Persian Gulf (Dammam) to the Red Sea (Jeddah), via Riyadh; and will seek to develop high-speed transport links between Medinah, Jeddah and Makkah. The SRO is hoping to appoint a preferred consortium to facilitate and manage the construction process.

Fig. 2.4 Main Sea Ports & Proposed Rail Link

Sea

Passenger port facilities are not highly developed along the Red Sea coastline of Saudi Arabia. The main international sea-gateway is the Islamic Port of Jeddah, which caters for around 1 million passengers and has a particularly important role to play in welcoming passengers during Hajj. The seaport at Duba also handles a large number of passengers, approximately 792,000 in 2004. The only other passenger port along the coastline is the Commercial Port at Yanbu. Otherwise, the main boat access is via small fishing ports.

The Cruise Ship sector is a relatively new phenomenon for the Saudi Red Sea Coast, with docking recently provided at the Islamic Port of Jeddah. However, there may be potential to expand the Cruise Ship offer, both at Jeddah and in the ports of Yanbu and Dhuba which as an integrated system would provide three distinct stopping points. The viability of this type of development needs to be investigated further.
to identify potential demand; the port-side facility requirements; and the landward services necessary, such as the greater integration of transport systems in and around the cities.

**Infrastructure**

**Water Supply**

Desalination - The supply of water is a key issue for the development of tourism along the Red Sea coastline.

Water from natural sources is in limited supply within all of the Red Sea Provinces, and therefore much of the water requirements are sourced from desalination plants.

Desalination plants logically need sea-fronting locations to allow for easy extraction of seawater, and subsequent discharge of by-products. Both the scale and nature of the developments, however, and their propensity to cause pollution, can potentially be in direct conflict with any tourism aspirations. On one level, these large-scale industrial-style constructions protrude from the natural beauty of coastline, so subsequently detract and degrade the environmental value of resorts when visible; and on another level, the pollution, particularly through the discharge of high volumes of salt and waters with higher than sea level temperatures, can have a damaging effect on fragile eco-systems such as the coral reefs, mangroves, and seagrass.

It must be emphasized that the quality and presentation of the natural environment and coral habitats represent two of the most valuable tourism resources of the Red Sea Coastal Zone. As such, it is recommended that a balanced approach be adopted to the proposed increase in use of this water source that also gives consideration to the impact that Desalination Plants have on the tourism potential and aspirations of surrounding locations.

In particular, we would advocate adopting a strategy that recommends the development of plants in areas that are secluded from landscapes and environments that have the highest tourism and conservation values; and that concentrates discharge away from fragile wildlife habitats to ensure pollutants do not exceed the levels expressed in the following section.

Water Pipe Network - In conjunction with examining future sources of water, the water delivery systems is also anticipated to require further development in some areas in order to ensure tourism resorts have adequate supply.

The review of current infrastructure found that in some areas of the Jazan and Asir provinces there is a high dependency of water being delivered by tanks, leading to problems of fair and equal distribution when demand rises. This will only be further exacerbated if the investment in tourism resorts is not matched by infrastructural investment.

In addition, measures should also be implemented which seek to reduce the loss of water through current systems, and to prevent wells, particularly local wells, from being contaminated by poor sewerage and waste disposal or withdrawing excessive amounts of water from local aquifers so as to damage surrounding areas.

**Electricity Supply**

The Saudi Electricity Company (SEC) provides a fairly comprehensive network of electricity within the Red Sea Provinces. The main population centers tend to be linked to the main power grid, although some areas such as Umluj do not have sufficient infrastructure in place to supply all of the demand directly. In ad-
2. Current Tourism Situation

Many of the outlying villages are reliant on local generators.

However, overall the supply of electricity is not considered to be a key constraint to the development of tourism. SEC has a number of plans to improve supply and distribution networks. In addition, SEC feels that it is in a position to respond to new developments within most areas, as long as it is consulted in advance to ensure that the proper infrastructure of substations, power lines and connections are implemented.

Waste Management

The situation of waste disposal within all provinces has the potential to hinder the development of resorts and harm the image of tourism along the Red Sea coastline if appropriate management solutions are not adopted.

Currently, the proportion of the population linked to a centralized sewerage system is limited. For instance, only 10 percent of the City of Jeddah and 9 percent of the Asir Province are connected to an effective piped sewerage system. The bulk of sewerage is discharged to cesspits and septic tanks, with evidence of insufficient treatment of the effluent, and in some instances disposal of untreated effluent direct into the sea. This occurrence has resulted in pollution of the sea and damage to key coral and environmental habitats, and contamination of water wells which increases reliance on desalination plants, both of which could impact on the viability of tourism.

In addition, the effectiveness of the removal of solid waste varies tremendously throughout the Red Sea Coastline. As a result of inadequate facilities and poor management, there is now growing evidence of indiscriminate dumping of waste along road which is both unsightly and unhealthy, and can detract from the desirability of a destination.

Investment is being committed to improve both sewage and solid waste collection across several of the Provinces. For instance, Jeddah has introduced a new effluent treatment facility; 920km of piped sewerage network is planned in several cities in the Asir Province; studies have identified the need for treatment works in Jazan Province; Duba is expected to have its own centralized sewerage network installed in the near future; and Madinah is expanding its effluent treatment systems. Implementing these schemes is considered a high priority in order to deliver a product that is aesthetically pleasing, and doesn't cause health risks to visitors.

In conjunction with these developments, there is also a need for stricter enforcement of policies and laws to prevent illegal discharging of waste, or use of untreated water for irrigation.

Telecommunications

Overall, telecommunications are not considered to be a major constraint to tourism development along the Red Sea as the telecommunications infrastructure is reasonably well developed throughout the Red Sea provinces.

The main concern of the Saudi Telecommunications Company (STC) appears to be in its ability to keep pace with the increase in demand for mobile telephones; and in providing microwave SRS services across the Tabuk Province for example. STC feel that they are in a good position to be able to cater for demand created by expansion of the tourism sector along the Red Sea, but have requested prior consultation regarding any development to ensure that telecoms systems can be introduced at the construction stage.

2.9 Conclusions

It is clear that the Red Sea coast meets most of the criteria that developers would require before commencing on major tourism development projects. Such criteria include access to international and national markets, existing tourist facilities and attractions and attractive coastlines able to support tourist activities. However these criteria are only met at certain places along the coast. Elsewhere there are isolated stretches of coast with no existing settlement or tourist facilities, where there would need to be strong justification of introducing tourism.

Major improvements are underway to the coast road that will soon run in dual carriageway from the Yemen to the Jordanian border, but this alone should not be the justification for ‘opening up’ new areas to tourism. New development also requires water and power and servicing remote areas is expensive and visually and environmentally intrusive. It is better therefore to apply a rule of ‘sequential development’ when considering the strategic development of a sector such as tourism, and this will be applied later in this study (Section 8).

The overall conclusion at this stage is that there is sufficient transport and utilities infrastructure in existing
areas such as the greater Jeddah region and the Yanbu area to accommodate major development, while more specialist tourism areas, may require a new airport (such as the Farasan Islands) or new local roads (such as the mountain areas of Tabuk or Jizan). However in all areas there needs to be major upgrading of waste and waste water treatment.
Marine and Coastal Environment

3.1 Introduction

Identification of the ‘values’ of the Red Sea in environmental terms is critical to obtaining an understanding of the potential for growth within the tourism sector and the management of such values to perpetuate such growth sustainably.

3.2 The Red Sea Coast

The Red Sea coast of the KSA extends for 1840 kilometres from the border with Jordan north of Haql (29° 30’ N) to the border with the Republic of Yemen at Oreste Point (16° 22’ N). This is some 79% of the eastern seaboard of the Red Sea (MEPA/IUCN 1987). The continental shelf extends offshore for a distance of less than a kilometre in the Gulf of Aqaba, but to 100 km at the Farasan Bank.

The Red Sea and Gulf of Aden represent a complex and unique tropical marine ecosystem with extraordinary biological diversity and a remarkably high degree of endemism. Located at the junction of three major bio-geographical realms and characterised by an arid coastal zone with minimal freshwater input, the Red Sea and Gulf of Aden Region contain some of the world’s most important coastal and marine environments and resources.

Extensive studies and literature exists on the marine and coastal habitats of Saudi Arabia’s Red Sea coast with much attributed to PME, in conjunction with the IUCN and PERSGA. As such, a definitive baseline has been established by both local and international experts.

Physiographic Zones

Four physiographic zones (based upon species distribution) have been identified as existing within the western coastline of Saudi Arabia. The distribution of these zones is most likely due to a number of physical factors including (but not limited to) substrate, surface water runoff, nutrients, water circulation and climatic factors. These can vary considerably along the western coastline of Saudi Arabia.

Zone A – Gulf of Aqaba
Characterised by its geographical isolation and the relatively high number of species which are either restricted to or restricted from the area. The extreme north of the Gulf contains species found nowhere else in the Red Sea.

Zone B – Northern Red Sea
Characterised by the seagrass (Thalassodendron ciliatum) which is found in this zone and Zone A, but rarely elsewhere in the Red Sea. Temperature may be a determinant factor for many of the species distributions.

Zone C – Central Red Sea (including the Outer Farasan Bank)
Contains many species which are absent from Zone B to the north and Zone D to the south. There is some evidence that coral abundance is important in explaining the species distribution in this zone as well as temperature.

Zone D – Southern Red Sea
Contain many species which are more suited to sediment-loaded waters which occur here because of terrigenous input and water mixing across the wide shallow coastal shelf. The highest sea temperatures are found in this zone and coral development is restricted.
The habitats and species contained within these four zones represent some of the most important in the world. Extensive mangroves, seagrass and macroalgal beds occur in the study area, forming highly productive habitats for unique species assemblages. The great variety of reef types in the Red Sea is astounding. The diversity of corals, many of which are found only in the Red Sea, is greater than anywhere else in the Indian Ocean. More than 1,500 species of fishes have been recorded from the Red Sea, higher than any other enclosed sea. Endemism at generic, species and sub-species levels in the Red Sea is extremely high, especially among reef fishes and invertebrates.

The following sections aim to provide a baseline description of the key ecological features of the study area.

Coral Reef

Distribution
Coral reefs are found along the entire length of Saudi Arabia’s 1,890km coastline, extending from the Gulf of Aqaba southwards and fringing many of the numerous offshore islands. The status of coral reefs bordering the Red Sea and Gulf of Aden is generally good, with live hard coral cover averaging 20-50%. The densest areas of coral reef exist in the northern regions between Al Wajh and Duba.

The central-northern areas, north of Jeddah to Haql in the Gulf of Aqaba supports a near-continuous coral reef tract composed of a diverse range of reef types. This area supports relatively complex geomorphology and includes mainland and island fringing reefs, patch reef, coral pinnacles and ribbon barrier reefs.

Fringing Reefs
Extensive mainland fringing reefs occur around Rabigh, Ras Baridi, Umluj, Al-Wajh to Duba and in the Gulf of Aqaba, the latter often being narrow (<30m wide), developed as contours on the relatively steep sub-littoral topography. Island fringing reefs are common in the Tiran area and from Duba to Al-Wajh Bank to Umluj.

Patch Reefs
Also widespread in offshore waters (<50m depth) some reefs are capable of supporting sand-coral islands (cays) whereas others are submerged and resemble coral carpets. Both are common in the Al-Wajh Bank and south from Umluj to Rabigh. Shallow waters (<10m depth) of the Tiran area and southern Al-Wajh Bank comprise of networks of reef matrix forming intricate reticulate patterns as well as pinnacles or ‘bommies’.

Barrier Reefs
Developed further offshore and on the edge of the continental slope (water depths from <50 to >200m), the best-developed barrier reef is located along the seaward margin of the Al-Wajh Bank and stretches for approximately 100km. A smaller reef system known as the “Little Barrier Reef” is located near Yanbu.

Tower Reefs & Atolls
Coastal reefs become less developed south of Jeddah and towards the Yemeni border partly due to increased turbidity and possibly anthropogenic activities. Offshore, however, in particular towards the Farasan islands, complex reef structures including tower reefs, similar in geomorphology to atolls, are present.

Areas of Note and Conservation Value
Five areas have been noted for their exceptional quality these include The Gulf of Aqaba, the Tiran Islands, Al-Wajh Bank; and the Farasan Islands (including the Farasan Bank). Also of importance are the reefs north of Yanbu and the reefs between Obhur and Thuwal (north of Jeddah).
Whereas five areas have been recommended for Marine Protected Area (MPA) status, to date, only the Farasan islands have been designated as such.

Fig. 3.2 Density of Coral Coverage

The following descriptions of the zones has been extracted from PERSGA Technical Series Number 7 – October 2003 Coral Reefs in the Red Sea and Gulf of Aden.

The Gulf of Aqaba
The Gulf is noted for its high levels of percentage coral cover and species diversity, including species that are rare or apparently absent from other parts of the region (e.g. Cantharellus doerderleini, Caulastrea tumida). Of particular note are the characteristic narrow contour reefs (<50m wide), which are present on steep coastal slopes. These narrow reefs are among the most species-rich of the entire region. The high species diversity is particularly significant given the restricted reef area, cool sea temperatures and that the Gulf of Aqaba is at the north-western most extent of reef development in the Indo-Pacific region.

The Tiran Area
This area extends from the mainland coast north of Duha to the entrance to the Gulf of Aqaba. It is important for the wide variety of different biotopes and reef types, forming unique reef complexes with high zoogeographical significance. These reef complexes support a high species diversity including Red Sea endemic corals, presently undescribed coral species and species with restricted distributions which are otherwise rare or absent in the Red Sea.

The Al-Wajh Bank
This bank supports the greatest range of reef types (and other marine and coastal habitats) in the region. As with the Tiran area, reefs of the Al-Wajh Bank support Red Sea endemic corals, undescribed coral species and species with apparently restricted distributions. The size of the Bank, the diversity of reef habitats and likely high level of ecological connection in terms of larval dispersal in ocean currents, both within the Bank and with other parts of the Red Sea, afford it great conservation significance.

The Farasan Islands and Farasan Bank
This area supports a wide variety of reef types, including tower reefs and other marine and coastal habitats not present in other areas.
Near Shore Coral Reefs
It should be noted that the five locations highlighted above have been described as being of world importance and, as such, the level of importance of coastal reefs in and south of Jeddah pales in comparison. However, Jeddah, as does much of the Saudi Red Sea coast, possesses a vast array of coral habitats with varying degrees of importance and possible conservation value. The importance of conservation should be viewed with respect to both environmental issues and potential economic earning potential.

Illustration of the wealth and variety of coral reef habitat offshore of Jeddah is provided in Photograph 3.1. Not only does this show that this is a rich zone but it demonstrates the resource that could be utilised for tourism purposes. It is worth noting that the areas in which the dives were undertaken is not classified of huge ecological diversity of conservation importance, thus demonstrating how rich even the ‘unimportant’ areas are to the country.

Shore Based Coral Communities
The photographs in Photograph 3.2 were taken during a shore-based dive at the Sheraton Hotel beach resort. The quality of the marine life is clear to see and again demonstrates that much of the Saudi Red Sea coastline is worthy of protection and would be of attraction to visiting divers.

Species Richness
The Red Sea has a high biodiversity, with at least 266 coral species in Saudi Arabian waters. Approximately 82% of coral species within the study area are hermatypic (reef building) corals, with 17% being ahermatypic. The highest diversity occurs in the central region. The number of species increases southwards from approximately 30 species in the Gulf of Aqaba to a high of more than 80 near Jeddah.

The number decreases to less than 50 near Al Birk and below 10 species on the southernmost inshore reef. Furthermore, the study area contains many of the reef types exhibited around the world including mainland fringing reefs, island fringing reefs, platform patch reefs, pinnacles and barrier reefs.

Threats to Coral Reefs
Human disturbance to reefs in Saudi Arabia is generally low, but higher around the larger cities. The reefs off Jeddah are influenced by the growing city which is now home to 2.8 million people, with associated increases in pollution, domestic and industrial sewage, construction, dredging of seabed materials, sedimentation and effluent from desalination plants. Local and foreign tourism is increasing with the accompanying boating and diving which results in direct impacts to the coral reefs. The Al Wajh and Farasan Islands regions have few human pressures, although there is increasing fishing pressure in more remote waters away from the Coast Guard patrols. Some destructive fishing has been reported (e.g. striking corals to drive the fish into nets).

Mangrove
Mangroves generally grow in waterlogged and saline soils of the intertidal zone and are often associated with areas of run-off. Only two species have been
recorded along the Saudi Arabian Red Sea coast, Avicennia marina, which is widespread, and Rhizophora mucronata, found at only six sites. They are found in such areas as broad coastal plains, protected shores, over shoals and spits, and in lagoons. The northerly limit for Avicennia marina is Sharm Zubeir and extends south beyond Jizan and into Yemen.

Mangroves play an important ecological role. They are nurseries for several commercial fish species (including the shrimps) and they protect coral reefs by trapping sediment loads from the seasonal rainwater influx. Additionally, they provide nesting, roosting and breeding sites for several species of birds and enrich the marine food web.

Red Sea mangroves are very sensitive to over-exploitation and mangrove degradation has been reported in many parts of the Region due to over-cutting, excessive browsing by camels, damming rainwater draining through valleys, pollution and coastal constructions. Other human activities (e.g. mariculture, land reclamation etc.) are placing further pressures on remaining stands and the potential impacts on both biodiversity and economic factors (e.g. fisheries, eco-tourism etc.) is now of concern.

**Threats to Mangrove Populations**

A number of anthropogenic activities pose serious threats to the existence of mangroves along the Saudi Red Sea coast. Some of these threats stem from traditional activities whereas others are as a result of coastal development. The lack of an effective enforcement of existing legislation is resulting in the destruction of these productive and potentially foreign income earning ecosystems.

A number of activities have been identified as playing key roles in their destruction, the following list highlights these:

- Camel grazing and cutting;
- Alteration of topography and water flows through: dredging, reclamation; and construction activities (e.g. bridges, dams, jetties etc.).
- Diversion of tidal waters via canals;
- Sediment loading;
- Shrimp farming;
- Damming of freshwater;
- Solid wastes and garbage;
- Organic pollution;
- Industrial pollution.

**Seagrass**

Higher densities of seagrass beds tend to be found in the southern regions of the Red Sea. Productive habitat is commonly found in shallow waters (e.g. lagoons and wadi mouths where water depths average at approximately 6m) where accumulation of fine sediments is conducive to seagrass production.

**Distribution**

Effectively, the distribution of seagrass species exhibits a north-south pattern with diversity increasing southwards. The reasons for the distribution of seagrasses within the study area is mainly due to both physical and environmental conditions, namely: water temperature, salinity, substrate type and water depth. Hence, specialist species may inhabit areas unsuitable for others.

The northern sections of the study area possess restricted intertidal and sublittoral zones, where the shoreline – sea interface is characterised by steep subtidal walls attaining relatively deep depths, this is not conducive to seagrass populations.

Typically seagrasses thrive in shallow intertidal areas with a substrate consisting of fine sediment. The central areas of the study area do possess significant intertidal and wider sublittoral zones, particularly in areas of lagoons where shelter from wave exposure is provided by fringing reefs. Thus, this area hosts significant seagrass populations.

Further south and towards the Farasan islands, water depths are more conducive to seagrass growth, however, instability of the substrate (i.e. not suitable for rooting) somewhat limits dense seagrass populations.

**Overall Importance of Seagrass**

- Stabilisation of the seabed against wave action and other erosional forces.
- Promotion of sedimentation and accumulation of organic and inorganic matter.
- Direct source of food for a few herbivorous animals (e.g. urchins, fish, turtles, dugong, and more importantly, as a major input to detrital food chains which provide an indirect source of food.
- Nursery or refuge area (also feeding areas) for resident and migratory fauna including fish, crustaceans, molluscs, many of which are of commercial importance.
Turtle

All five species of pantropical marine turtles occur in the Red Sea. Three species are commonly seen in the Red Sea and Gulf of Aden, these include:
- Green turtle (Chelonia mydas);
- Hawksbill turtle (Eretmochelys imbricata); and
- Loggerhead turtle (Caretta caretta).

The Leather Back and Olive Ridley turtles are infrequently seen with no recordings of nesting in the region. Green turtles are herbivorous and feed on the many species of seagrass and algae present with the study area. Hawksbills often inhabit coral reefs where they feed on a number of invertebrates and sponges which are found in plentiful supply. Loggerheads feed predominantly on crustaceans and molluscs, and inhabit shallow water reef assemblages.

Nesting Sites

Three major nesting regions are present with the study area, they include:
- Sagafir;
- Umm Lauj (north of Yanbu); and
- South of Al Lith and encompassing the Farasan Bank and Islands.

Turtle nesting is restricted in both distribution and frequency within the study area with the best Green Turtle nesting sites supporting a nesting density of about 100 per year. Although fewer in number than sites found in South Yemen and in Oman, the nesting sites in Saudi Arabia are locally significant. Hawksbill turtles, because of the size of the population and nesting sites, are of both international and national significance and represent a relatively undisturbed refuge primarily due to the destruction of the world-wide population. 70 nesting areas have been recorded in the study area, with only 13 located on the mainland and the remaining sites on offshore islands. The headland south of the Yanbu cement factory is the only significant mainland site.

Nesting of Hawksbill in Red Sea

In the Northern Red Sea, both Green and Hawksbill turtles nest on islands close to the shore and on the mainland. In the Southern Red Sea, nesting is confined to the smallest islands furthest offshore. This is likely due to both availability of nesting sites and pressures from fishermen. Northern areas have limited islands and islets compared to the Farasan Bank. Fishing pressure is high around the Farasan Bank and inhabitation of some islands has forced turtle nesting to the most offshore and isolated islands.

Threats

Threats to turtle populations within the study area fall within two main categories:
- Threats to habitat affecting various stages in the life cycle.
- Mortality due to anthropogenic activities (e.g. fishing and exploitation).

Threats to habitats can result due to over exploitation of nesting sites by individuals although it is recognized that this poses a small risk. However, more serious threats include the following:
- Increased coastal development in areas close to and incorporating nesting beaches. This can result in the removal of nesting areas completely (i.e. due to reclamation, construction activities, land use etc.) or due to related impacts from developments (e.g. light pollution, noise etc.). Lighting poses dangers to emerging hatchlings causing disorientation and attraction away from the shoreline.
- Dumping and littering. Accumulation of litter and debris can significantly reduce available nesting areas in addition to creating obstacles to nesting females and emerging hatchlings.
- Oil and chemical spills and the associated sub-lethal and lethal effects.

Marine Mammals

Dugong and several species of dolphins and whales are among the marine mammals found in the Red Sea. They are most common in shallow coastal and inland waters and the Gulfs of Suez and Aqaba. Dugong feed almost exclusively on seagrasses, such as found on the Wajh Bank, near Port Shama and near Al Qahma. Dugong is a vulnerable species because of its low numbers, slow reproduction rate and susceptibility to captive.
The commonest species of dolphins in the Red Sea is the Common Dolphin found in the northern part of the outer Farasan Bank. Bottlenose and Hump-backed dolphins have also been sighted there, and further north around the Wajh Banks. Pilot whales are also known to inhabit the Red Sea, but not in large numbers.

**Ornithology**

**Seabirds**
A number of different species of seabird breed in the Red Sea, mostly on predator-free islands. Typical species are boobies, gulls, terns and noddies. Those species found at each site are named in the Technical Paper and significant population sizes, greater than the estimated regional 1% level (1% of the total regional population of that species or subspecies) are given when known, as are other counts. It should be realised that some data is not particularly recent and fresh surveys are warranted in the majority of sites described.

**Shorebirds and other Waterfowl**
Species of shorebirds (waders) and other waterfowl (such as different species of Heron, Spoonbill and Pink-Backed Pelican), are noted as important when a significant number of a species restricted to the Middle East, other than seabirds, is found breeding; when 1% of the estimated regional population is found breeding in a site, or when 1% of the estimated regional flyway population of a species is found in that site on migration &/or in winter. This so-called 1% level is a standard minimum qualifying criterion used to assessment regional importance of a site. Shorebird populations remain poorly known in most Red Sea sites.

**Birds of Prey**
Osprey and Sooty Falcon are two particular species of birds of prey that nest in the Red Sea, and these are also named in the sites’ accounts. The latter is very largely restricted to the Middle East. The Egyptian Vulture is a third breeding species present, with other passage migrants, namely Lanner and Saker Falcon, both also threatened in large parts of their Middle Eastern range, being listed when they occur in a site.

**Other Coastal and Riparian Species**
Other specialist coastal and riparian (especially mangrove) species are relatively few but include White-Collared Kingfisher, Mangrove Reed Warbler and Clamorous Reed Warbler. An unidentified White-eye, perhaps Senegal White-eye, occurs in some mangrove sites on the coast south of Jeddah, this being the only part of Arabia where the species is known.

**Other Coastal Activities And Threats To The Environment**

**Introduction**
This section identifies the other coastal users and activities that are located in the KSA Red Sea coastal area. The Tourism Strategy should not only takes account of their presence (or potential presence) to ensure minimal or total avoidance of conflicts (i.e. resources and impacts) but also notes how these activities can impact upon the environment in their own right.

Known threats to the environment should be taken into account with regard to existing and further degradation of natural, physical and socio-economic values. In addition, it is recognised that some of these threats are an integral part of tourism development (i.e. sewage treatment and disposal) and, as such, will need to be addressed in the implementation of the Tourism Strategy.

<table>
<thead>
<tr>
<th>Development or Activity Type</th>
<th>Threat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban development</td>
<td>Rapid spread of cities such as Jeddah along the coast.</td>
</tr>
<tr>
<td>Land filling</td>
<td>Dredging and reclamation of new sites and impacts upon habitats such as coral and mangrove.</td>
</tr>
<tr>
<td>Water use</td>
<td>Effect of desalination and abstraction of groundwater.</td>
</tr>
<tr>
<td>Sewage</td>
<td>Discharge of treated and untreated sewage into the marine environment.</td>
</tr>
<tr>
<td>Navigation</td>
<td>The presence of and risk to offshore navigation, both small and large craft. The potential for discharge of materials from these craft, either deliberately or accidentally.</td>
</tr>
<tr>
<td>Industrial development</td>
<td>The spread of industrial development including cement factories, oil and chemical refineries etc.</td>
</tr>
<tr>
<td>Fisheries and aquaculture</td>
<td>The exploitation of fish resource through traditional and factory methods, and the use of dedicated facilities for the farming of fish.</td>
</tr>
</tbody>
</table>
to be controlled so as to minimise impacts upon the environment.

Table 3.1 identifies the main coastal users and the threats they pose to the environment. These are then discussed in summary in the following section.

Reclamation and Coastal Development

Dredging has historically concentrated around Jed-dah, Yanbu and in Sharm Juba. Tourism and, hence, coastal development have caused severe disturbances to coastal and marine habitats. Along parts of the Red Sea coast, specifically near Jed-dah and Yanbu, reefs have been severely damaged. Mangroves, coral reefs, seagrasses, turtles, and other important resources are significantly altered due to the processes of landflling, dredging, and the use of corals and sand as construction materials.

Coastal developments are concentrated on and around urban areas where commercial and residential developments are clustered. The expansion of urban or residential areas along the coast of the Red Sea has a significant effect on the coastline. Major developments are concentrated along Jed-dah, Yanbu, Rabigh and Jizan.

Along the Jed-dah coastline, large recreational cities have been developed including the construction of new residential developments with their associated infrastructure. In fact, their construction has required significant dredging and reclamation, therefore, significantly affecting the Red Sea coastal environment. Besides the direct destruction of the marine life and habitats through dredging and coastal construction, landflling procedures have resulted in the spread of suspended materials which damage marine life. Sedimentation from these operation results in the suffocation of benthic communities and severely effects surrounding mangroves, seagrass beds, and coral reefs.

In addition, Recreational uses of beaches and the increased leisure activities and tourism, including the construction of beach homes on the coasts, has greatly added to the deterioration of the Red Sea.

Moreover, residential, industrial, and commercial developments require transportation infrastructure including ports, roads, jetties and docks which may play a significant role in the deterioration of coasts. A good example would be the cornice road in Jed-dah which has caused some environmental problems and noted loss of marine resources.

Desalination Plants

Saudi Arabia is the world’s largest producer of desalinated water. There are 18 desalination plants operating along Saudi Arabia’s Red Sea coast with a total capacity of 726,343 m³/day in 1992. Other desalination units are under construction, such that once completed, the Kingdom will be producing 800 million gallons of desalinated water/day. The network includes both one-function plants, producing only desalinated water, and dual-purpose plants which produce desalinated water and electricity. Dual-purpose plants produce 20% of the Kingdom’s total electricity supply.

Two major concerns regarding desalination plants are the impact on the marine environment due to thermal pollution and elevated levels of salt, and chlorine in the discharged water from those plants. Depending on the location and volume of the discharge (i.e. shallowness of the receiving water), the significance of the impact varies. In fact, discharges from the desalination plants in Jed-dah into the Red Sea coast exceed the ambient salinity of the Sea by 1.3 times and at a temperature of 41°C. In addition, chlorine, anti-sealant chemicals, and brine are all discharged into the Red Sea. Moreover, the effluent coming from the desalination plant is a concentrated brine solution which has the potential of killing marine organisms due to their unnatural concentration. Also, chemicals from pretreatment procedures and periodical membrane cleaning may harm the habitats. Chlorine, for example, used to clean pipes or to pre-treat the water, may severely affect marine habitats and species.

Sewage Treatment and Disposal

Some urban areas have wastewater treatment facilities, but in many other places, these are considered inadequate or do not exist. On the Red Sea coast, Jed-dah, Yanbu, and Rabigh are the main areas with pollution problems (i.e. due to large population numbers).

The sewerage system in Jed-dah treats sewage by six secondary level treatment plants. 65% of the urban population is connected to these six plants. This public sewage treatment network operates at a total capacity of 191,000 cu m/day which exceeds its design capacity by approximately 32%. Around 40,000 cu m/day from that treated wastewater is reused for city landscaping, whilst the remaining 146,000 cu m/day is discharged into the Red Sea after chlorination. The other 35% percent of the Jed-dah’s population, who do not have access to the sewerage system, use septic tanks for the disposal and treatment of sewage.
Industry

Industries are concentrated amongst the urban areas of Jeddah, Yanbu, Rabigh and Jizan. Facilities include desalination plants, wastewater treatment, cement, and power plants, petrochemical plants, salt production plants, and oil refineries.

Moreover, these oil and gas refineries are located close to the coast of the Red Sea due to the fact that it facilitates marine transportation and ensures sufficient supplies of cooling water. Refineries generally impose a severe threat to the marine environment when regulations regarding effluent discharges are absent or process control is poor.

The King Fahd Port at Yanbu is one of the world’s largest industrial ports as it stretches for more than 15 km along the coast and contains seven major terminals. Several modern ports and industrial cities are being built, however, ports and new installations are often placed on natural creeks and coves which occur on both sides of the Red Sea. These areas are very likely to be important grounds for spawning and nursery of fish, shrimp and other forms of marine life.

The Royal Commission for Jubail and Yanbu has devised environmental standards to which all industries operating in the industrial cities should comply with. These standards are based on the European and US standards. However, there are several sources of coastal water pollution including the discharges of oil and other chemicals, and effluents from industrial and residential sources. The Red Sea receives high pollution rates from refineries and other production facilities.

Industrial effluents, in the form of thermal pollution from power and desalination plants, hypersaline brine water from desalination plants, particulate matter and mineral dust from fertilizer and cement factories, and chemicals and organic wastes from food processing factories have contributed to the degradation of water quality of the Red Sea.

Fishing and Aquaculture

Coastal zones are now subject to high pressure from expanding commercial and industrial fisheries, and many former fish nurseries have been lost to coastal reclamation from industrial, residential and recreational facilities. Fishing activities in the Red Sea are divided into 3 main types:

- Industrial/commercial Fishery;
- Artisanal Fishery; and
- Aquaculture.

Since 1981, industrial and commercial fisheries have exploited fish and shrimp stocks in both the outer and inner Farsan Channels. The major commercial fishing ports are located in Jeddah and Jizan. In Jizan, there is a centre for fish storage and processing with a 1,200 tonnes capacity. In addition, Jeddah has a major fish market in which the Saudi Fishing Company’s fish catch is unloaded from their vessels.

Moreover, artisanal fisheries intensifies in the Southern areas of the Red Sea coast. In 1977, 72 communities of fishing communities were identified in which the density of those communities increases towards the south, where population is the highest. Offshore fishing usually takes place during the daylight and on a multiple-day basis.

Aquaculture was developed under the principal recommendation of the White Fish Authority (WFA) program since Saudi Arabian stocks were considered insufficient for future demand. The target was set as 1,600 tonnes per year by the WFA.

Aquaculture has increased its production from 2,960 tonnes in 1996 to 8,018 tonnes in 2001, which represents 14% of the total fish production of the Kingdom. In 2001, there were 149 freshwater and marine farms in operation with the majority of production of approximately 3,918 tonnes in 2001 coming from freshwater aquaculture.

Marine aquaculture is expanding rapidly, in particular shrimp farms in the region of Jizan and the Tihama Plains. Other marine species either include sea bream, rabbit fish, and mullet.

The sea between the Farasan Islands and the coast is Saudi Arabia’s major fishing ground in the Red Sea, and continued growth in fishing is expected as demand for seafood increases. If unmanaged, these factors are a potential threat to the resource sustainability, conservation status and cultural values of the Farasan Islands.
Others

Due to the important location of the Red Sea, it is considered one of the major shipping routes connecting between the Indian Ocean and the Mediterranean Sea. In fact, its location has increased in its importance due to the establishment of the Trans Arabian pipeline also called TAPLINE which terminates at Yanbu port, where petroleum products are loaded on and off.

In addition, agricultural activities including camel grazing on mangroves and other coastal vegetations has also influenced the marine environment of the Red Sea.

Increases in sea level and storminess due to climate change could have serious effects for low-lying areas. Although incidences of flooding appear to be fairly infrequent currently, the damages due to flooding events can be expected to increase as development in the susceptible low-lying coastal zone expands.

Areas that are considered to be particularly at risk can be split into two categories:

- Areas where land filling has taken place such that the shoreline has been moved seaward until it reaches (or is close to) the fringing reef. These areas are vulnerable to flooding during storm events because deep-water waves are able to penetrate very close to the shore without being affected by the seabed. This can lead to flooding from spray (grey water overtopping) or wave run up (green water overtopping). This is particularly the case at the Jeddah North Corniche and some parts of the South Corniche.
- The effectiveness of a coral reef to reduce wave energy at the shore is well known. Waves break over the reef and the remaining wave energy reaching the shore is minimal. If coral is damaged or removed, then this protection is lost and a change to coastal processes and erosion/deposition patterns should be expected.
4.1 Introduction

This section describes the relevant legislation that is in place with regards tourism and the protection, management and control of the coastal and marine environment of the Red Sea, within the KSA. In addition, the key regulators and stakeholders that are involved in this regulatory framework are discussed, with particular relevance to their roles, responsibilities and interests.

4.2 Tourism Planning Framework

4.2.1 National Tourism Development Plan Preparation

The National Tourism Development Plan (NTDP) for the Kingdom of Saudi Arabia (KSA) was prepared during 1421-1422H (2000-2002) by the Supreme Commission for Tourism. This long-term plan, that covers a 20-year period up to 2020, was adopted by the Council of Ministers in March 2004. The STDP provides a policy framework for the preparation of the Provincial Tourism Plans, along the Red Sea coastal area of which there are five. The provincial plans are, in turn, to be followed by the preparation of detailed plans for priority tourism areas, Tourism Development Areas (TDAs), and subsequently, master plans for tourism sites, or Tourism Site Plans (TSPs), within their provincial areas.

4.2.2 Provincial Tourism Development Plans

Makkah Province clearly holds a dominant position within the national tourism setting. The province absorbs over a half of all domestic tourism and three-quarters of international tourism in the KSA. It accommodates the holy sites of Islam in the city of Makkah, Jeddah as the nation’s major resort and commercial centre, as well as the former summer capital and mountain resort of Taif.

Consequently, given the scale and importance of the tourism market in Makkah Province, it was decided to prepare the provincial tourism plan in two phases. The first would take a provincial overview by concentrating on strategic planning issues and key linkages between the three major tourism centers, whilst the second would prepare more detailed tourism plans for Makkah, Jeddah and Taif. The Makkah Provincial Tourism Development Plan was completed in Draft Final form in August 2004. Subsequently, the Draft Jeddah Tourism Development Plan was produced in March 2005.

All other provinces along the Red Sea coast have had draft or draft final versions of a tourism plan prepared. Thus, the Aseer Tourism Development Plan (Draft Final) was produced in December 2003, the Jazan Tourism Development Strategy (Draft Final) in June 2004, and in October 2004 both the Madinah Tourism Development Plan and the Tabuk Tourism Development Strategy were produced in Draft form.

4.2.3 Tourism Development Areas

A Tourism Development Area (TDA) is defined in the NTDP as being an area of concentrated tourism activity in which specific regulations will apply concerning the planning and development of tourism. TDAs provide a geographical framework within which identified projects could be implemented through coordinated investment. Some TDAs cover reasonably small areas, for instance an individual town or geographical location, whilst others, could cover extensive areas of a particular province. Where there are more TDAs within a given province then this typically reflects very different location or attraction characteristics there. Generally, TDAs have been designated according to the following criteria:

- They have a range of tourism attractions;
- The availability of tourism accommodation and ancillary facilities, and opportunities for their improvement;
- Good accessibility from other parts of the KSA.

There are three categories of TDA: existing, emerging and new. These categories are defined in the NTDP as:
4. Policy, Legislative and Institutional Framework

- **Existing TDAs**: These are based on well-developed tourism destinations, which already have a concentration of tourism attractions, and facilities where existing markets are predicted to grow. Examples of these areas would be Jeddah, Makkah Al Mukaramah, Madinah Al Munawarah, Taif and Abha. Existing TDAs have an airport and are linked to the national highway network;

- **Emerging TDAs**: These are focused on existing urban areas that have basic tourism infrastructure, facilities and attractions with potential products and markets that are predicted to grow. Emerging TDAs have an airport and are linked by existing major highways or major roads that are to be built or upgraded to expressway or dual carriageway status;

- **New TDAs**: These are designated in areas with little or no existing urban facilities, but with excellent resources suitable for the development of products directed at markets that are expected to grow. New TDAs either have an airport or are within four hours drive of an airport and are either linked to the rest of the national transport network by a dual carriageway or by an improved single highway.

When a TDA has been designated then it is intended that a tourism plan for that area should be prepared in the National Plan. 43 TDAs have been designated of which 20 are in the Provinces along the Red Sea. The tourism plan would act as the guiding document for all future tourism-related development applications and land use zoning issues within that area. The NTDP outlined the following objectives for tourism plans:

- To safeguard and conserve the tourism environment;
- To identify key sites for tourism activities (including the management of natural and cultural sites);
- To identify potential locations for new tourism facilities;
- To establish design standards and the promotion of sustainable solutions for tourism development.

4.2.4 **Tourism Sites**

Tourism Sites are identified in the provincial tourism plans. They are designated for sites that include nationally significant tourism attractions. Their designation implies that the SCT would support the development and management of these sites for tourism activities. Other tourism sites of lesser significance would remain the responsibility of other agencies. As of July 2005, the SCT had drawn up a preliminary list of 10,000 tourism attractions, of which 903 were designated as Tourism Sites. These covered a range of attractions located in mountainous, desert or coastal areas, which could include an ancient trade route, a forest recreation area or they could cover much smaller geographical areas such as a historic battlefield site, a group of traditional buildings, a natural water source or a popular picnic area, for example.

- The availability of different tourism attractions;
- Good access to the site and the opportunities for improving accessibility;
- Good linkages with other tourism attractions;
- The availability of tourism accommodation and ancillary facilities.

A classification of Tourism Sites is needed in terms of their category of attraction (cultural/heritage, resort) and their importance, by for example providing a grading system according to whether they are primary, secondary or tertiary attractions. This could be based on the potential visitor numbers that each attraction could receive.

4.2.5 **Tourism Development Companies**

SCT has set up Tourism Development Companies (TDC) with the specific purpose of promoting tourism development in the KSA. The TDCs have been set up based on a partnership approach between the SCT and relevant government bodies for a particular tourism site or TDA. TDCs will aim to encourage private sector tourism investment and will prepare tourism development plans for a TDA, for example, and will facilitate and coordinate investment proposals. They will also supervise and monitor the implementation of tourism development.

It is recommended that for the Red Sea coastal zone TDAs should be more restricted in area and be targeted at primary natural attractions (which also need to be conserved). For these areas specific powers and regulations for providing tourism-focused investment, and for promoting conservation, should be implemented. These powers clearly need to ensure that there are no contradictions with those of other authorities in that area.
4.2.6 General Tourism Law

In March 2006 the SCT announced a significant move with proposed drafting of a General Tourism Law. The overall aim is to provide the necessary legislation to ensure the implementation of the National and Provincial Tourism Plans. The SCT had already revised all the existing tourism-related regulations and identified the need to support major developments such as the Thumama Resort north of Riyadh and projects emerging from this Red Sea Study.

4.3 Relevant Legislation

4.3.1 Tourism Related Legislation

The three key areas of such legislation concern tourist accommodation, maritime activities such as diving and the protection of sites of antiquity.

Tourist Accommodation

The Hotels Act (1395) sets out a broad definition of hotel to cover self catering, furnished apartments as well and requires, or makes provision for:

- A licence to operate from the Ministry of Commerce;
- A licence for construction from the relevant Municipality;
- The classification and inspection of establishments;
- A series of bylaws on quality of service, price fixing and training.

A subsequent Ministerial Decree (1421) concerning regulations for Furnished Apartments provided more detail for this particular sector, allowing for separate regulations in Makkah and Madinah during Haj and a separate classification system.

Maritime Activities

The Security and Safety Regulations for Fishing, Cruising and Diving in the waters of the Kingdom of Saudi Arabia (1410) provide a comprehensive framework for all the agencies involved in this sector.

The Coastguard is designated as the agency responsible for deciding the areas suitable for leisure-based boating activity. They also are given the responsibility for security and safety within coastal waters, and in conjunction with the Ministry of Agriculture they are required to monitor and regulate fishing activities. Both agencies also designate fishing and diving areas.

The Ministry of Transport is responsible for granting business licences to commercial leisure boats and the General Presidency for Youth Welfare issues licences for beach clubs.

The Coastguard is however the main authority for diving, responsible for the diver licensing system and diver training systems. They are also responsible for granting the special permits required for night diving and underwater photography.

Since the creation of the Supreme Commission for Tourism it has played a key role in reviewing these arrangements and has received several submissions from the marine related tourism sector requesting a more supportive approach by the various Ministries and Agencies involved. Examples of the restrictions that the range of regulations can impose include:

- Prohibition of women going diving or fishing without a Chaperone;
- Even drivers of small rented boats require a license from the Coastguard, unlike in most countries where the operator takes the responsibility;
- Cruising is limited to a three mile radius of the marina;
- Tourist groups visiting dive centres must provide the Coastguard with an X Ray of the jaw of each diver;
- International certification of diver competence should be accepted as in most international resorts;
- New regulations imposed without consultation;
- Only Saudis are allowed to own recreational boats.

Antiquities

The Law of Antiquities (1398) defined the movable and immovable properties to be classified as antiquities and established the Antiquities Directorate within the Ministry of Education (subsequently taken over by the Supreme Commission for Tourism.) It provides powers for the identification, and protection of such artefacts and sites and allows for the involvement of the Antiquities Department in the planning and development process. It also covers issues such as the exporting of artefacts, excavation and the related penalties for breaking the regulations.
4. Policy, Legislative and Institutional Framework

4.3.2 Environmental Regulations

Environmental regulations have been continuously developed as environmental awareness in the KSA has increased. Saudi Arabia has adopted environmental legislations principally through the ratification and signing of international and regional laws and conventions regarding certain environmental issues, as listed in Tables 4.1 and 4.2.

The first step in formalising environmental law was taken via the adoption of the concept of five-year development plans in 1970. These development plans comprised comprehensive assessment of environmental policies, as relevant.

The Public Environmental Law was enacted by Royal Decree No. M/34 dated 16th of October 2001, and was published in the Official Gazette number 3868 dated on the 9th of November 2001. The Public Environmental Law creates a general regulatory framework for the development and enforcement of environmental rules and regulations, and assigns general responsibility for this to the Presidency of Meteorology and Environmental Protection (PME).

Under this law, the PME is responsible for:
- Conducting environmental studies;
- Documenting and publishing the results of any environmental studies;
- Preparing, issuing and reviewing relevant environmental standards;
- Ensuring compliance with relevant environmental standards;
- Working in conjunction with other government agencies, establishing plans to deal with environmental problems;
- Promoting general awareness for protecting the environment; and
- Working in conjunction with other government agencies in dealing with violations of applicable environmental standards.

The Implementation Regulations to the Public Environmental Law were issued by the Minister of Defence and Aviation Resolution No. ///9 of September 2000 and published in the Official Gazette No. 9 of October 2000. Under this law, PME is responsible for issuing or withholding its consent for projects to ensure compliance with the Public Environmental Law and the Implementing Regulations. Under this regulation, any licensing authority, other than PME, must ensure that an EIA is prepared by the applicant during the feasibility study of any project that may present a negative impact on the environment.

Projects with negative impacts are separated into 3 classes according to the classification provided within the Implementation Regulation by which an initial environmental assessment application is required for each class of project, as follows:
- A class I project must prepare a simple report describing the project;
- A class II project must prepare a brief environmental technical report of the project; and
- A class III project must prepare an EIA.

The class of project is dependent on the nature of the development type, its processes (i.e. likely impacts) or the environment within it is operating. Further detail is provided within the regulatory guidance notes. Following their initial review of the application with the provided documentation, the PME may reject the application, grant unconditional PME consent, or impose any conditions that may be necessary to address any concerns that the PME has. Moreover, when conditional PME consent is granted, the applicant should fulfil these conditions as a prerequisite to grant the licence provided by the relevant licensing authority.

In 2002, Saudi Arabia adopted the Basic Law commonly referred to as the constitution of Saudi Arabia, which states under Article 32 of this law that "The State works for the preservation, protection, and improvement of the environment, and for the prevention of pollution."

In addition, there is a Law known as the Public Environmental Law regarding polluting the sea and land of Saudi Arabia with toxic, nuclear or other similar dangerous materials in which failing to adhere with will result in a punishment.

Moreover, there are a number of national decrees and laws regarding the protection of the environment, including the following:
- Environmental Protection Standards Document No. 1401-01;
- Council of Ministers Decision No.271 obliging the use of best available technology to reduce pollutant emissions;
- Draft National Fisheries Regulations;
- Rules and Regulations for Saudi Arabian Seaports;
- Water Resources Conservation Law M/34;
- Hazards Waste Disposal Standards;
• Establishment of the National Commission for Wildlife Conservation and Development (NCWCD);
• Royal Decree 7/B/13307 concerning effluent from landfill ports;
• Royal Decree No.7/M/8903 concerning standards for the environment;
• Royal Decree No. M/9 establishing a moratorium on land-filling in port areas; and
• Royal Decree for jurisdiction of fishery activities.

As with any nation with a large land area and coastline, there are many problems associated with coordinating the implementation of environmental legislation in Saudi Arabia. It is not the remit of this report to investigate issues of authority or management powers within this document, given that the majority of input would be subjective. However, problems with regard the management, enforcement and monitoring of marine and coastal infrastructure and activities is noted, and also commented upon within Section 5.

4.3.3 Fisheries Regulations

Fisheries regulations and legislation are introduced, enforced and regulated by the Fisheries Affairs Directorate of the Ministry of Agriculture. The Ministry also has an enforcement office to control and enforce the management measures although the Coast Guard and other marine agencies perform actual enforcement. Various closed areas in both the Red Sea and the Arabian Gulf are also in place for shrimp and fish species. However, enforcement of these regulations is weak and illegal fishing is common. There are no controls on outputs and no fishery is managed under a quota or Individual Transferable Quota (ITQ) system.

The main management measures in place for both the shrimp fishery and the finfish fishery in the Kingdom include:
• Closed seasons for shrimp fishing in the Arabian Gulf (variable but currently from January 1 to August 1 each year) and in the Red Sea from March 1 to August 1;
• Minimum mesh sizes for shrimp trawl nets. In the artisanal fishery, the minimum cod-end mesh size for shrimp trawlers is 30mm;
• Closed seasons for important coral reef species of grouper in the Red Sea;
• Mesh size restrictions for gill nets in both the Red Sea and Arabian Gulf. Minimum mesh size for fixed gill nets is 80mm. Nylon and multi-layered gill nets are prohibited;
• Provision of soft loans for the development of the traditional fishing sector including loans for engine purchase, upgrading fishing equipment etc.;
• Temporary suspension on the issue of new fishing licenses; and
• Establishment of marine protected areas in both the Red Sea and the Arabian Gulf.

The basic laws governing fisheries in the Kingdom include a number of Decrees that relate to specific fisheries issues rather than a single all-encompassing policy and regulatory framework. Among the more important Decrees are:
• Fishing in the Red Sea Coast Law of 1931;
• Royal Decree M/9 of 1988 regarding Living Marine Resources within the National Waters: Fishing, Investment and Conservation Law;
• Royal Decree No. M/7 of 1979;
• Royal Decree M/19 Concerning regulations for catching, investing and protecting marine resources (1990);
• Royal Decree No. 4 of 1981;
• Royal Decree No. 9 of 1986; and
• Royal Decree No. 11 of 2002.

4.3.4 International Agreements and Conventions

Saudi Arabia is signatory to several international agreements. See Table 4.1 below.

4.3.5 Others

Saudi Arabia is also signatory to several regional conventions. See Table 4.2 below.

4.4 Regulators and Stakeholders

Supreme Commission for Tourism

The SCT was established by Royal Decree Number Nine in 2001. The main objective of the Commission is to develop, organise and enhance the tourism sector of Saudi Arabia.

The Supreme Commission was responsible for the preparation of The National Tourism Development Strategy (NTDS) with defined guidelines. The NTDS, a comprehensive and strategic project for tourism, consists of three stages: assessing the general situation to develop the tourism strategy for the next twenty years, placing the next five years plans in place, and presenting a detailed strategic plan to build and develop the tourism industry in Saudi Arabia. This strategy was
based upon several ethics and values including being economically, socially, culturally, and environmentally feasible and sustainable. The strategy also defined the tourism vision and mission in Saudi Arabia via assessing available tourism resources, target markets, current and future tourism activities. Many subjects where discussed in this strategy including the following:

- Studying the geographical standards and dimensions for tourism activities.
- Design guidelines and quality standards and systems that may restrict tourism products and destinations.
- Specifying the organisational structure of the national tourism development.
- The role and responsibilities of the public and private sectors in tourism development and improvement.
- Identifying economical, environmental, social, and cultural impacts of tourism development and obstacles facing tourism investment.

PME
In 1951, the Department of Meteorology was established as part of the Civil Aviation Directorate. With increased demand of information in the fields of planning, industry, agriculture, transport, and other activities, a Royal Decree ordered the establishment of a General Directorate of Meteorology in 1966. As the need to care for the environment emerged, the General Directorate of Meteorology was the one responsible to take care of the environmental issues under the Royal Decree in 1981 and hence, the name was changed into Meteorology and Environmental Protection Administration (MEPA), subsequently retitled as PME.
The main functions and targets of MEPA were the following:

- To improve safety, health and human welfare of all citizens by the provision of services in meteorology, climatology, and environmental protection;
- To Develop and produce environmental policies;
- To improve MEPA programs by raising standards of production, accuracy and other services by establishing updated laboratories, computer facilities, workshops, and regional centres;
- To build public awareness amongst citizens concerning the importance of environmental affairs via media and incorporation into the curricula of schools and universities;
- Encouraging researches and studies in different universities and research institutions to improve citizen's participation;
- The provision of meteorological, climatological and environmental support to the developing and planning of major projects and national economic affairs via establishing relevant data-banks;
- Increasing the effectiveness of meteorological and environmental programs by participation in regional activities;
- Encouraging the development of technical capabilities for meteorological and environmental aspects and activity within public and private sectors in Saudi Arabia; and
- Supporting academic establishments and research centres.

The highest institutional authority for environment and related issues is the Ministerial Committee on Environment (MCE), which PME's president acts as Secretary General for. The MCE includes relative sectoral ministries and organisations including the following: Agriculture and Water, Municipal and Rural Affairs, Industry and Electricity, Health, Petroleum and Minerals Resources, Foreign Affairs, Interior, Finance and National Economy, King AbdulAziz City for Science and Technology (KACST), and the National Commission of Wildlife Conservation and Development (NCWCD).

MCE is the policymaking body for Saudi Arabia on environmental issues in which their primary objective is to formulate and implement plans that adhere to Saudi's policies, capabilities, and strategies.

PME, however, is the central environmental authority responsible for adopting and developing the environmental standards, indicators, monitoring programs, and impact assessments. Hence, PME is the responsible authority for EIA studies.

**NCWCD**

The NCWCD was established by a Royal Decree in 1986. NCWD's main mission is to “Develop and implement plans to preserve wildlife in its natural ecology and to propose the establishment of proper protected areas and reserves for wildlife in the Kingdom, and to manage such areas”, as stated in the Royal Decree.

The Royal Decree had set the following as the main functions of the commission:

1. Encouraging and carrying out scientific research in different fields of life science especially in wildlife ecology.
2. Urging public interest in ecological aspects of wildlife, and to seek proper solutions to problems through meetings, symposia and conferences attended by concerned specialists.
3. Carrying out comprehensive surveys of available data and results of research, concerning wildlife and natural ecology in Saudi Arabia, gained from materials published in both national and international references.
4. Developing and implementing plans and projects to preserve and maintain wildlife in their natural ecology by establishing protected areas and reserves in the Kingdom of Saudi Arabia, in additional to the execution of orders and regulations regarding such areas and projects.
5. Co-operating with different ministries, authorities, national and international institutions and individuals.

Besides carrying out and applying biological research, the Commission is also concerned with the preservation, protection and development of wildlife. The Commission’s organisational structure comprises of a board of Directors made up of the following:

- The Minister of Defence and Aviation;
- Minister of Interior;
- Governor of Riyadh Region;
- Minister of Foreign Affairs;
- Governor of ‘Asir Region;
- President of Meteorology and Environment Protection;
- Minister of Agriculture and Water;
- Minister of Petroleum and Mineral Resources;
- Minister of Municipalities and Rural Affairs;
- President of King Abdulaziz City of Science and Technology; and
- Secretary General of NCWCD.
4. Policy, Legislative and Institutional Framework

PERSGA

PERSGA is an organisation that is dedicated to the conservation of the coastal and marine environments of the Red Sea and Gulf of Aden. PERSGA is also responsible for the implementation of programs aimed to preserve the ecosystem and the high biological diversity of the region by promoting activities that are aimed to protect the environment and, hence, support sustainable development in the Red Sea and Gulf of Aden region.

PERSGA began intervention when this rich marine environment was threatened mainly from oil discharges, dredging and reclamation, industrial outfalls, and wastes being dumped into the coastal zone. Also, increased consumption of natural resources produced a major concern to the environment given that the natural balance was being disturbed. In the Early 1970s the Arab League Educational, Cultural and Scientific Organisation (ALESCO) commenced in a program which targeted the protection of the environment of the Red Sea and Gulf of Aden which, with the assistance of UNESCO.

PERSGA was formally announced in the Cairo Declaration which was the basis for the 1982 Jeddah Convention, signed between Djibouti, Egypt, Jordan, Sudan, Yemen, Saudi Arabia, Somalia, and Palestine, for the conservation of the Red Sea and Gulf of Aden. Hence, PERSGA is responsible for the Red Sea, the Gulf of Aqaba, the Gulf of Suez, the Suez Canal to its end on the Mediterranean, and the Gulf of Aden surrounding the Socotra archipelago and its nearby waters.

PERSGA is operated and governed by a council made up from ministers involved in the environmental affairs in each of the seven member states as follows:

- Minister of Habitat, Urbanization, Environment and Land Management, Djibouti.
- Minister of State for Environmental Affairs, Egypt.
- Minister of Environment, Jordan.
- Ambassador of Somali in KSA, North East Somalia.
- Ambassador of Somali in KSA, North West Somalia.
- Presidency of Meteorology & Environment (PME), Saudi Arabia.
- Minister of Environment and Physical Development, Sudan.
- Minister of Tourism and Environment, Yemen.

Furthermore, PERSGA’s daily affairs are run by a secretariat team of professionals recruited from various countries which is currently hosted in its headquarters in Jeddah after once being based in Cairo and then Tunis. PERSGA is funded by all its member states, whilst regional programs are assisted by international donors. Most activities are carried out with the cooperation of international bodies including UNESCO, UNEP, IUCN, and the International Maritime Organisation (IMO).

PERSGA has many achievements including the following:

- Developing international laws protecting the environment of this sensitive region including the 1982 Jeddah Convention;
- Worked on evaluating the status of marine mammals in the region with UNEP;
- Assistance with the development of a model for oil spill trajectory for the Red Sea along with UNESCO and ALESCO;
- Undertaking a survey of natural habitats and, hence, formulation of a plan for their protection in Djibouti and Sudan;
- Undertaking an environmental assessment of the coasts of Saudi Arabia and Yemen with cooperation with IUCN; and
- Undertaking a national plan for marine science which includes collecting data and assessing pollution as well as shrimp cultivation and pearl oysters in the concerned water bodies.

PERSGA, however, continues on the regional level to focus on training workshops on environmental assessment, surveys and monitoring, oil pollution, establishing marine protected areas, and sound coastal zone management in the area.

In the hope of protecting the regional marine environment, PERSGA strives to achieve sustainable use of marine resources via introducing a practical management and monitoring scheme and enhancing public awareness regarding marine conservation and sustainable development.

Therefore, the objectives of PERSGA may be summarised into the following:

- Addressing the problems concerning the prevention of marine pollution;
- Management and sustainable use of marine resources;
- Reduction of navigation risks;
- Conservation of habitats and biodiversity;
- Supporting integrated coastal zone management;
Establishing a network of marine protected areas;
Promotion of public awareness; and
Active participation in regional programmes including the implementation of the Strategic Action Program for the Red Sea and Gulf of Aden (SAP).

It is worthwhile to mention that SAP project is being funded by the World Bank, UNEP, United Nations Development Programme (UNDP), the Islamic Development Bank (IDB) and other international organisations. SAP provides a framework for the management and conservation of coastal and marine resources of the Red Sea and Gulf of Aden. It is worthwhile to mention that SAP also constitutes many elements of which the following are the major items:

- Reduction of both navigational risks and marine pollution;
- Sustainable use of living marine resources;
- Conservation of habitats and biodiversity;
- Establishment of a network of marine protected areas;
- Supporting integrated coastal zone management;
- Institutional strengthening; and
- Enhancement of public awareness and participation.

Ministry of Agriculture

The General Directorate of Agriculture was established in 1948. In 1954, it was renamed as the Ministry of Agriculture and Water. The Ministry started operating through six agricultural units in Riyadh, Kharj, Hasa, Madina, Jizan and Buraida. The Ministry, however, underwent several structural and development stages in all levels. In 1961, two deputy ministries were introduced: Ministry for Agricultural Affairs and the Deputy Ministry for Water Affairs. In 1965, the Higher Committee issued a resolution for Administrative Reform under which the Ministry was divided into three main sectors:

1. Agricultural Affairs sector headed by the Deputy Minister for Agricultural Affairs.
2. Water Affairs Sector headed by the Deputy Minister for Water Affairs.
3. Financial and Administrative Affairs Sector headed by the Director General of Administration.

However, in 1977, an agency for research affairs and agriculture development was established followed by the establishment of a sector for fish resources.

As a result of all such reforms, and in order to cope with the overall development in Saudi Arabia in all different fields, the Ministry currently consists of five main sectors:

1. Agriculture.
2. Water.
3. Research.
4. Fish Resources.
5. Financial and Administrative Affairs.

The Ministry of Agriculture and Water (MAW) is now responsible for implementing economic plans and programmes for water development, desalination, agriculture, irrigation, conservation of scarce water, fisheries, and animal sources. The MAW is also working on the preparation of a national strategy and action program for desertification control.

Under the Royal Decree No.7/505M, MAW holds responsibility over fishery activities. Moreover, MAW monitors the marine environment regularly and tracks any changes as a result of pollution as it is also the responsible body for fisheries. In fact, MAW has implemented a strategy to protect shrimp hatching and feeding in areas of the Arabian Gulf, areas of Gizan, and in the Red Sea, in order to conserve important coastlines and restore their natural state. Fishing is also banned in the Red Sea from March to August. “Najil” and “Taradi” fishing was also banned for two consecutive years during the time of propagation in order to monitor the impacts of such protections.

MAW also sets up environmental protection measures that are specifically designed to restrict fishing to protect the marine environment and to ensure the safety and quality of Saudi fish products. As a result, MAW prohibited and banned all indiscriminate activities of catching fish and other marine organisms such as the use of toxic chemicals, electric shocks etc. Instead, MAW have designed and distributed appropriate mesh sizes for nets aimed at the protection of small fish, promoted the use of modern fishing techniques which ensures protective and effective fish catching techniques without wasting some fish, and finally promoted the use of modern marine farming systems which takes the marine environment in consideration.

In addition, MAW established the Saudi Fisheries Company (SFC) which is a joint stock company of which 40% is owned by the State. The SFC targets sustainable conservation and utilisation of marine resources. However, The SFC was also responsible for setting up 52 outlets designed with the highest standards in order for seafood to be handled under
appropriate environmental conditions to ensure the quality of the product.

Future plans for MAW in the fisheries sector include the following:

- Updating and developing the regulations for fishing investments and the protection of marine resources;
- Updating the strategies designed for the development of fish resources, farms, and sustainable protection of their natural environment;
- Optimal management of coastal environmental zones by the development of coastal surveys and study of pollutants;
- Continuous research & studies on the marine environment including the collection of basic data on habitat studies, data on physical, chemical, and hydrographical criteria;
- Studies to monitor pre-and post-construction/operation facilities, oil-spill related studies.
- The most important achievements of the Fisheries sectors in the MAW include:
- Identification of fishing means and equipments to least impact the fish including the determination of appropriate mesh size of all nets used in Saudi Arabia’s coastal waters in a manner such that small fish can escape;
- Modernisation of fishing means and, therefore, the development of traditional fishing, improvement of production materials for boats and increasing the awareness of fishermen;
- Identification of periods for banning the catch of certain types of fish and shrimps in order to protect those species;
- Preventing increased fishing deterioration by temporary suspension of new fishing licenses or registrations of new means of fishing;
- Establishing and developing fish farms in some marine coastal areas and inland water bodies to lighten the pressure on certain economic fish stocks;
- Prohibiting the disposal of solid wastes and effluents into sea water unless otherwise coordinated with relevant authorities;
- Identifying certain environmental sensitive marine zones which are claimed into marine protected areas;
- Undertaking studies which targeted replanting various coastal areas of the Red Sea and the Arabian Gulf with mangrove plants due to their effective environmental importance; and
- Conducting surveys to identify suitable coastal land for fish farming.

Planning Authorities

The following ministries play an essential role in formulating environmental policies and regulations and are all members of the Preparatory Committer for Ministerial Committee on the Environment (PCMCE) and Ministerial Committer on the Environment (MCE):

- The Ministry of Industry and Electricity (MIE);
- The Ministry of the Interior (MoI);
- The Ministry of Municipal and Rural Affairs (MoMRA);
- The Ministry of Petroleum and Mineral Resources (MPMR);
- The Ministry of Planning (MoP); and
- The Ministry of Health (MoH).

Ministry of Municipality, Rural Affairs and Housing is considered one of the planning authorities since it holds responsibility in the planning and development of cities, towns, roads, and basic infrastructure. It is also responsible for managing and maintaining services, supervision, construction and maintenance of certain projects. Moreover, it is the authority responsible for the evaluation of tenders, allocation of contracts and classification of contractors.

Coastguard

The Saudi Arabian Coast Guards was established by Royal Decree No. 33. Under this Decree, the Coastguards have authority between the borders of the territorial sea, 12 miles offshore and 10km inland.

Other Stakeholders

- The Sea Port Authority, established under Royal Decree No. 7505 M, holds the responsibility for ports.
- The Royal Commission for Jubail and Yanbu is the body responsible for the industrial development in both cities and with the cooperation with MEPA, it is also responsible for environmental management within the two industrial cities.
- The Ministry of Transport holds the responsibility for marine navigation in territorial waters.
Comparisons and Best Practice

5.1 Introduction

There has been rapid growth in tourism in the Middle East over the last ten years and it is important to examine the lessons that can be learnt from the experience of neighbouring countries, and draw conclusions as to what Saudi Arabia and the Red Sea coast should avoid and what they can benefit from. There are also examples of best practice in issues such as reef management, dive management and protected area management that can provide positive guidance on the way ahead.

5.2 National Comparisons

5.2.1 Tourism Development in the Middle East

The countries of the Middle East are experiencing a rapid expansion in relation to tourism and the development of tourist resorts and related infrastructure. This development is seeking to increase tourism activity at all levels, including domestic, inter-regional and, in some cases, international to boost export receipts and diversify economic activity.

The following section provides a brief overview of the key strategies and policies being implemented by neighbouring and regional competitors; and highlights any significant investment and developments of interest.

Egypt

Egypt has long been recognised as a destination that attracts visitors from around the globe. Traditionally, the appeal of Egypt has concerned its strong history, heritage and cultural identity, drawing in visitors who wish to visit and experience the Pyramids and Sphinx in Giza, the Valley of the Kings, or a trip along the Nile.

However, in more recent times, the Egyptian tourism product has focused as much on the opportunities for leisure tourism as cultural/heritage tourism, with the Red Sea itself being targeted as a center for opportunity. In fact, the government has encouraged and facilitated tourism projects through incentives such as the offering the sale of land at $1 per square meter in designated tourism zones. Part of the rationale for this has been to deliberately draw the attention of the mass market away from its unique (and in some cases fragile) cultural and heritage assets, and to diversify the overall product to cater for the new and emerging activities markets.

Ultimately, this intervention has lead to a rapid expansion of tourism resorts along the Red Sea Coast of Egypt, particularly Hurghada which has become a popular beach resort and scuba diving destination; El Gouna which is the Red Sea’s self-proclaimed Premier Leisure Destination; Marsa Alam, which is a less densely developed resort, with key activities including fishing and more recently scuba diving; and Sharm el Sheik where international standard hotels have created a major resort for the European market.

Marsa Alam features heavily in the future framework to expand tourism infrastructure along the southern section of the Red Sea coastline. It’s location is seen to be of strategic importance, being at the T-Junction between the Red Sea Coast road and the road from Edfu which sits on the Nile river about 20km inland. As a result, this small fishing town is anticipated to be subject to a major investment programme, starting with the development of an international airport, and leading to a 1,000-berth marina and port, with dock-side harbour, yacht club, and a corniche with shops, restaurants, bistro, discos and a casino. It is also anticipated that greater emphasis will be placed on the unique reef habitats and the opportunities for snorkeling and scuba-diving.

However, the development of parts of the Egyptian Red Sea Coastline serve as an example of how rapid, unplanned and/or unsympathetic design and development can actually pose significant risks. For instance, the rapid expansion of tourism in Hurghada has created high rise, aesthetically deterring and environmentally damaging constructions, with a reported 80% of the live coral along this section of the coastline irreversibly damaged.
Comparisons and Best Practice

As a result, the Egyptian Environment Affairs Agency has set a comprehensive set of regulations for new construction and development which prohibits the destruction of the natural coastline, tidal flats and coral reefs; whilst the Tourism Development Authority requires resort propositions to be fully master-planned to ensure low-rise, aesthetically pleasing and culturally sensitive tourism design and development.

Bahrain

Bahrain, an archipelago of 33 islands, is said to be competing with Dubai to become the Middle East’s financial hub. In similar fashion to Dubai, one of the country’s largest investment areas is focused on tourism and strengthening its tourism appeal to an international audience.

According to the Bahrain Economic Development Board, current planned tourism projects equates to US$7.8 billion, with projects including:

- Bahrain Financial Harbour, which is to include hotels, retail space, leisure facilities, in addition to extensive residential and office space (US$1.3 billion).
- Al Areen Desert Spa and Resort, close to the Eastern Boundary of the Al-Areen Wildlife Sanctuary, which will include a water-park, hotels, and extensive spa facilities (US$600 million).
- Amwaj Islands, a group of man-made islands, which is to include a mix of residential, commercial, leisure, hotel and other tourism facilities (US$1 billion).
- Durrat Al Bahrain, a joint Kingdom of Bahrain-Kuwait Financial House venture, is a 20 sq km seaside city resort consisting of a series of 13 man-made islands, with each island having its own villas, townhouses and beach-front villas, as well as 5-star hotels (US$1 billion).
- Bahrain International Circuit, a Formula One racing track, opened in 2004 and hosted the first Grand Prix race of the 2006 F1 season (US$150 million).
- Adhari Theme Park, with a traditional bazaar, multi-purpose hall, food court, and rides with associated landscaping (US$26 million).
- The enhancement of the Equestrian and Horse Racing track and ancillary services, to include a hotel, multiplex cinemas and shopping mall (US$500 million).
- Phase 2 of the Rifa Golf Club, to include a country club with swimming pool, fitness center, tennis courts and a commercial center (US$200 million).

Qatar

The overall strategy of the Qatar Tourism Authority (QTA) is to ‘bring Qatar to the world and the world to Qatar’.

The vision for Qatar is to create a sense of place through combining its natural beauty, its heritage and its culture to offer:

’a welcoming Gulf country rich in values, culture, nature and heritage to offer an inspired experience to both business and leisure traveler and the national and expatriate communities."

’a country where the modern and vibrant capital Doha is a unique blend of state-of-the-art facilities, quality entertainment, the highest standards, timeless hospitality, and a strong sense of tradition."

’a quality destination with a personal touch in the Arabian Gulf’

Within this vision, the QTA is aiming to promote its core assets to leisure, business, education and sport markets. Particular opportunities are being sought to attract family audiences, the health and wellness market, those in search of unique cultural, nature and wildlife visits, and those seeking outdoor pursuits.

This vision was led to the development of a tourism masterplan which was unveiled in 2004. The masterplan is to be used to guide US$15 billion of investment into an array of projects aimed at establishing Qatar as a high quality destination for cultural tourism, beach resorts, shopping, lifestyle, business and sports events. In summary, the masterplan includes:

- The development of several hotel projects, with international brands including Four Seasons (235 rooms), Hilton (320 rooms), Marriott Courtyard (200 rooms), Renaissance (350 rooms), Shangri-La (250 rooms), and Rotana (277 rooms).
- The new international airport at Doha, with the first phase scheduled to be open in 2009 and with a capacity of handling 12 million passengers per year. Full completion is scheduled for 2015, when the airport is anticipated to handle up to 50 million passengers per year. (US$5.5 billion)
- The construction of 32 sq km of the North Beach Development, which is set to include 10 resort ho-
Hotels, two golf courses, 15,000 villas and apartments and 6 million sq meters of commercial space.

- The construction of Pearl Island, a man-made island of four square km, consisting of three luxury hotels (900 rooms), four marinas (700 berths), plus a mix of community and entertainment areas.
- The development of the Al Fareej Resort, a family orientated resort village with Arabian styled chalets.
- A comprehensive plan to conserve and promote Qatar’s historic forts.
- The development of new sporting facilities, and enhancing existing sporting facilities to cater for the 2006 Asian Games, and to host other international sporting and other high profile events.

The majority of these developments are scheduled to begin 2005/06 with completion by 2007/8/9.

Jordan

Jordan’s published tourism strategy (2004-2010) clearly sets out its vision for tourism to become:

“... an essential and vibrant growth sector that will contribute to improving the long-term economic and social well-being of Jordanians.”

Jordan’s ultimate goal in relation to tourism is to double tourism visitor arrivals by 2010 from its position of 1.4 million tourist arrivals in 2003.

In its review of the average annual international visitor growth, Jordan’s growth of around 6% per annum between 1995 and 2002 has not been as dramatic as other destinations in the Middle East, such as Oman (c.21% average annual international visitor growth), UAE (c.14%), and Bahrain (c.13%). Moreover, in terms of average tourism receipts per visitor, Jordan (US$485 per trip) considers itself to be below the world average (US$675), although it is on par with Middle East as a whole (US$470).

The strategy highlights the need to develop further its core market segments of:

- Cultural Heritage – through sites such as Madaba, Petra, and Ajloun, particularly the World Heritage sites in Petra and Quseir Amra.
- Religious Heritage – Jordan is in a unique position of having important sites for three of the world’s major religions, and is the recognised birthplace of Christianity and Judaism.
- Eco-tourism – through the Wadi Rum desert landscapes; Dana National Park which boasts a great diversity of landscapes and several rare plants; the Mujib Wildlife Reserve, which hosts some of the most ancient and interesting wildlife in the Middle East; and the Dead Sea, the lowest spot on earth.
- Health & Wellness – Jordan has a long heritage with regards to health and wellness travel, with the Dead Sea in particular said to contain healing waters, and mud rich in nutrients.
- Cruising – which the strategy recognises as an opportunity for the port of Aqaba;
- Meetings, incentives, conference and events – through developments that aim specifically to cater for this market, namely the Zara Center, the Culture Center, and an array of hotels that can cater for large groups and conferences.
- Scientific, academic, volunteer and educational – including cultural immersion, experiential learning-based travel, and voluntourism for example.

In order for Jordan to more effectively attract and facilitate visitors, the significant investment is now being concentrated in the tourism and hospitality sectors, with over US$2.5 billion worth of investment committed by 2010. Major investment projects include:

- The Royal Metropolis project, Amman, which will be a mixed use development, including a large scale (35-storey) hotel block (US$1 billion);
- Tala Bay resort, featuring a marina, golf course, 5,000 hotel rooms, housing units and retail, entertainment and sports facilities (US$500 million);
- Ayla Oasis project on the north beach in Aqaba, including 5 hotels, marina village, artificial lagoon and golf course (US$700 million);
- A number of resort and hotel developments at the Dead Sea, such as the Crystal City tourist project (US$140 million), the construction of a 250-room hotel and 30-serviced apartments (US$60 million), and a Holiday Inn Resort and Intercontinental Resort;
- The Abdali Urban Regeneration Project, which has a range of tourism facilities such as hotels, restaurants, cafes, entertainment complexes, and retail outlets.
Dubai

Dubai represents the success story of the Middle East in terms of tourism, particularly international tourism that draws as much on a western audience as it does from the Middle East region.

Tourism in Dubai has in the last 10 to 15 years grown considerably, with the 1 million visitors experienced in 1993 increasing by 450% to 4.5 million in less than 10 years. This growth has been driven by its strategic business location, with Dubai vying to become the main economic center of the Middle East. However, in more recent times, Dubai has expanded its appeal to the leisure market, specifically drawing upon its up-market shopping appeal combined with being a long-haul stopover destination for travelers on route to Indian Ocean island resorts, Australia, New Zealand, or South East Asia for example.

Now, Dubai is focusing attention on creating a significant mass of attractions, activities, and resorts for the City to be considered a long-haul destination in its own right, with the subsequent promotion aiming to tweak the imagery of Dubai as a shopping destination to one which 'also' offers shopping.

Oman

Oman is the oldest independent state in the gulf, with 82% of its land being desert.

In terms of tourism, the Government has in the past made a conscious decision not to promote Oman to visitors until it was ready to accommodate them. With the necessary accommodation, transport and other infrastructure now securely in place, Oman is now in a position to launch its offer and appeal to the visitor markets from around the world.

The sixth Five-Year Economic Development Plan came to an end in 2005, but it included an extensive section on tourism development. The emphasis was strongly placed upon quality rather than quantity, thus it is hoped that tourism will be increased in a manner, which is focused, sustainable, and in harmony with national interests.

Construction of Oman’s largest tourism development ‘The Wave’ commenced in May 2005. ‘The Wave’ is proposed to be a fully integrated premium tourism and residential resort, stretching along 7.3 kilometers high quality beachfront to the west of Muscat. The project is anticipated to cost $805 million, and will include three premium hotels, a marina, beach and golf villas, world-class golf course, upscale condominiums, and an array of leisure and entertainment options.

‘The Wave’ is being developed in response to the Government’s development policy that accords top priority to the development of the tourism sector as part of Oman’s diversification programme away from its current dependence on oil. The strategy is aimed at increasing the contribution of tourism sector from its 1% contribution in 2004 to 3% of the country’s GDP by 2010.

Oman has established specific tourism zones, from the capital of Muscat, to promising tourist destinations along the coastal zone. Within these zones, a series of tourism-related projects have been identified, or are being constructed, including:

- Muscat Golf and Country Club, located near Seeb - features luxurious villas and apartments and also comes with an all green PGA 18-hole golf course.
- Barr Al Jissah Resort and Spa - under the management of Shangri-La Hotels and Resorts, this development features a total of three hotels offering around 670 rooms as well as health club, swimming pools, leisure facilities and private beaches (US$169 million).
- Nakhal - a boutique hotel with health and hydro spas and access to Nakhal Fort (US$12 million).
- Upgrading the port of Khasab for cruise vessels setting up of upmarket hotels and resorts is part of the plan.
- Salalah Coastal resort – to include leisure facilities, a sports centre, a spa and a beach club (US$45 million).
- Al Savadi Integrated Tourism Resort - a standalone destination for European guests located about two hours away from capital city Muscat. The project comprises of 12 luxury hotels, two 18-hole golf courses, a family water park, a marina and private villas (US$306 million estimated cost).
- Mirbat Tourism Village - a private tourism development scheduled to be open in 2007, which will include a 5-star hotel with over 200 rooms and 70 chalets, restaurants, recreational facilities and other amenities (US$30 million).

Oman’s government is inviting foreign investment in tourism through the offering freehold ownership of residential real estate in Oman to international investors, and benefits such as tax breaks and subsidies. Oman is also therefore pressing ahead with further development of eco-tourism and natural attractions. Recent examples include:
• 5 star eco-tourism beach retreat in Haycoot (US$30 million)
• The Ras Al Jinz eco-tourism project (US$19 million)
• The development of hot mineral springs at Al Ansab and Rastaq into natural spas and wellness centres with large swimming pools.
• Ongoing development of Wadi Bani Khalid eco-tourism project with an adventure trail and a restaurant.
• The enclave of Musandam, famous for its steep fjords, bird and marine life, and diving sites, is a key focus for tourism development in the Government's Five-Year Economic Development Plan.

Malaysia

Tourism is a vital source of income for Malaysia, recorded as the second biggest contributor to the nation's economy. As a result, Malaysia’s Government is continuing its active programme of promoting tourism, and encouraging investment in tourism plant and facilities.

The main focus of Malaysia is on developing its assets in order to attract and appeal to a wide variety of the leisure market audience; from weddings and honeymooners, to nature lovers, to sailing, to diving, to remote islands, to families, to beach destinations, to shopping in Kuala Lumpur. The product is being diversified further to exploit new markets, such as health and wellness, eco-tourism, bio-tourism, and the cultural experience. In particular, Tourism Malaysia, which is the Government-backed Malaysia Tourism Promotion Board, is aiming to position the tourism offer at the more up-market visitor, and is seeking to develop hotels, restaurants, resorts and activities that reflect this ambition.

The vision is, therefore, to create a sufficient mass of attractors that will help Malaysia gain a greater share of the more lucrative European and Middle Eastern markets. In conjunction with new development, Malaysia has also been successful in launching a new low cost regional and domestic airline, and is set to develop an e-portal for airline, hotel, and tour booking in order to allow for easier booking and access of visitors from these areas.

The Promotion of Investments Act of 1986 actively seeks investment in tourism facilities and plant, particularly in hotel accommodation. The incentives available to developers include:

• being given Pioneer status – 5 year partial exemption from payment of income tax; between 70% to 100% (applicable to the Eastern Corridor) on statutory income;
• being given Investment Tax Allowance – companies receive a tax allowance of between 60% and 100% (applicable to the Eastern Corridor) on qualifying capital expenditure incurred over a 5-year period. This can be offset against 70% of their statutory income over the same period. (100% in the Eastern Corridor).
• access to further incentives for Hotel & Tourism Projects – additional tax incentives for accommodation providers; double deduction on overseas promotion activities; tax exemption for Tour Operators; tax exemption for promoting international conferences and trade exhibitions.

However, in conjunction with these incentives, the Government has also introduced more stringent development controls to ensure that suitable consideration has been given the impact that any tourism construction will have on the environment and biodiversity through Environmental Impact Assessments. These are to be conducted on any developments that will include:

• construction of coastal facilities or hotels with more than 80 rooms;
• hill station resort or hotel development covering an area of 50 hectares of more;
• development of tourist or recreational facilities in National Parks; and
• development of tourist or recreational facilities on islands in national marine parks.

As evidence of the force behind the importance of the environment, the Government has intervened to stop construction of certain developments which could detract or damage the environment, particularly on island resorts. In addition, to ensure that tourism is integrated within the other objectives for growth and prosperity of Malaysia as a whole, a joint committee has been formed to oversee the future development of tourism which involves representatives from the Ministries of Tourism, Housing, Transport, Youth, Sports, and Culture.

5.2.2 Conclusions

If one matches the experience of these Middle Eastern and Islamic countries against the tourism ambition of Saudi Arabia, and its concerns about protecting its
cultural traditions and environmental qualities, the following conclusions can be drawn.

**Positive Role Models**

Qatar
- A Clear tourism strategy
- Low volume/high value markets
- Focus on sports

Oman
- Strong heritage component
- Developing a ‘sense of place’
- Low volume/high value markets

Jordan
- Strong heritage component – landscape and culture
- Good quality marketing
- Good product mix and infrastructure
- High end Market

**Mixed Role Model**

Egypt
- Strong branding of Red Sea Riviera.
- Loss of ‘sense of place’ and local culture
- A history of over-development along the Red Sea coast
- Current attempts to introduce sustainable development (See RSSTI below)

**Negative Role Models**

Bahrain
- No strategic tourism planning
- Potential environmental impact of major offshore projects

Dubai
- Clear strategy to change Dubai from a ‘stop-over’ for long –haul flights to a destination in its own right
- Focus on mass international leisure market
- Loss of sense of place and threat to local culture and traditions.

5.3 **Best Practice**

5.3.1 **Red Sea Sustainable Tourism Initiative (RSSTI)**

RSSTI is a United States Agency for International Development (USAID) funded project with the Egyptian Tourism Development Authority (TDA).

RSSTI is part of a broader Egyptian Environmental Policy Program (EEPP), a joint USAID – Government of Egypt policy support program. RSSTI’s program is based on technical assistance, training, and limited equipment purchases, with a primary focus on TDA and private sector investors, developers and managers.

**RSSTI Work Components**

**Best Practices**

This work component involves the demonstration and introduction of selected “Best Environmental Practices” during the planning, construction and operation of tourist projects.

- Environmental energy assessments conducted to identify opportunities for environmental improvement.
- Environmental Management System (EMS) developed with properties along the Red Sea coast.
- An environmental management plan framework for an Integrated Development Centre (IDC)
- Best practices for infrastructure development, including construction site preparation and development and innovative water / wastewater systems.
- International environmental certification programs for Red Sea Coast properties will be reviewed with support for creation of an Egyptian Environmental tourism recognition program.

**Sustainable Tourism Awareness**

The objective of this component is to increase the awareness of the opportunities and means to support and sustain the environment by the tourism sector.

- Seminars and forums will be conducted for each of the Best Practice guidelines developed.
- Training Programs in support of Best Practices, environmental assessments and EMS will be undertaken.
An Ecolodge Forum covering marketing, finance, design and construction, case studies and linkages with visitor activities and protected areas will be conducted.

An International Conference / Trade Show on Sustainable Tourism will be organised and held in Egypt.

A public awareness program will be developed relating linkages between the environment, individual investor profits, and the general well being of the economy and community health.

Policy and Institutional Strengthening

This component involves support for TDAs activities related to environmental planning and monitoring

- Institutional plans for the Authority’s Policy Implementation Unit and a new Environmental Monitoring Unit will be supported.
- A computerised management information system will be designed, and technical assistance provided, including creation of a vibrant TDA website.
- Environmental Impact Assessment (EIA) and TDA permitting review procedures and guidelines will be assessed, with particular emphasis placed on coordinating mechanisms with other agencies.

5.3.2 Management of Recreational Scuba Diving

Scuba diving has become one of the most popular and fastest growing water based sports over the 60 years since its invention by Jacques Cousteau and Emile Gagnan. The Professional Association of Dive Instructors (PADI) estimated that during the 1990’s between 500,000 and 700,000 new divers qualified each year, reaching an international total of over 10 million by 2000. By its nature and in particular, the appeal of attractive dive sites, it is frequently a holiday activity. For some it is the prime purpose of a holiday, while for others it is one of a number of activities that are undertaken.

However, it is also, by its very nature a risky activity, both for the diver and the dive location. In order to minimise risks to the individual and to the dive sites it is often therefore the subject of regulations and management by the public and private sector. The key areas of concern are:

- checking the medical fitness of the diver;
- ensuring divers are trained and accredited to an appropriate standard;
- the health and safety standards of the dive centre operators; and
- the protection of the marina environment (natural and historical) from the uncontrolled activities of divers.

The SCT has convened working parties to advise on how the development of this key sector of marine tourism can best be promoted and managed, and they have concluded that lessons can be learnt from studying ‘best practice’, and the prime candidates are Queensland and the Maldives.

The Queensland Government has prepared an ‘Industry Code of Practice for Compressed Air Recreational Diving and Recreational Snorkelling’. Working within legislation provided by the Workplace Health and Safety obligations and Workplace Health and Safety Act 1995 it sets out a combination of regulations, advisory standards and industry codes of practice. The health and safety control measures cover:

- ensuring no persons are left behind;
- medical fitness of divers;
- supervision of divers in open water;
- appropriate skills and knowledge of workers and divers;
- instruction and advice to non-English speaking divers;
- the equipment for diving;
- air quality in air cylinders;
- dive tables;
- driving depths;
- ascent diving;
- emergency plans;
- rescue of a diver;
- First Aid and Oxygen;
- Dive Safety Log; and
- Flying after diving.

Guidance notes are also provided on decompression illness, nitrogen narcosis, barotraumas and panic.

The success in the implementation of these measures can be gauged from the following table:

- 1 death per 430,000 dives in Queensland
- 1 death per 120,000 dives in the rest of Australia
- 1 death per 100,000 dives in the USA
- 6.5 deaths per 100,000 dives in Japan

In terms of unifying the preparation and enforcement of diving regulations, the Maldives is an example of
bringing together safety and management issues. By
virtue of the Maldives Tourism Act (2001) the Ministry
of Tourism is authorised to prepare diving and marine
club/class regulations.

The Ministry has the following duties under this
law:

- To specify the required certificates as qualification
  for divers and workers.
- To specify the depth and area limitations.
- To specify the requirements and equipment for
diving centres.
- To specify the description of vessels for diving.
- To identify safety and security requirements.
- To license, register and collect trees for diving
centres.
- To identify those bodies authorised to obtain a
  license for diving clubs.
- To ensure provision of all diving statistics from
  such bodies.
- To ensure provision of all diving statistics from
  such bodies.
- To control and monitor the services provided at
tourism resorts, hotels, ports, diving centres and
travel agencies.
- To collect fines and financial penalties.

5.3.3 Bonaire National Marine Park

Background

Bonaire is the second largest of the Dutch Antilles
in the Caribbean and is 24 miles long by 3 to 7 miles
wide. With a population of only 15,000 the island has
an 'amazing' biodiversity which includes endangered
turtles. Reef diving is the key tourist activity and main-
stay of the island’s undiversified economy. The reefs
are very accessible and therefore vulnerable to coastal
activities and development. Sewerage disposal from
the island was damaging the reefs in the past.

History

Bonaire Marine Park (BMP) was set up in 1979 to
protect the coral reef. It was effective in the early years,
however once start-up funding ran out the manage-
ment activity declined heavily. In the early 1990’s a
World Bank Study estimated that reef diving was near
the reef’s capacity. (1/4 million dives per year) and
as a result, in 1991 a new management contract was
established with a board and Marine Park manager.
From 1992 an annual admission fee ($10) was charged
to divers, allowing the Marine Park to be self-supportive.

Divers embraced the fee, and pre and post dive brief-
ings, which were implemented. Monies generated could
only be used for the upkeep and maintenance of BMP,
provision of education and outreach, the conduct of
research and monitoring surveys and law enforcement.
In 1993 a tourism carrying capacity was set then in 1994
a 7-year moratorium on new tourist accommodation
and coastal development was passed. The Marine Park
of Bonaire gained National Park status in 1999.

Fee System

Dive operators administer the collection of the fee,
which could invite dishonesty in declaring the funds
collected. However, a unique procedure ensures there
is good accountability of the funds.

There are many advantages of the fee system includ-
ing; the park now being self-financed, the high level
of compliance with rules and regulations and divers
are keen to dive in a more sustainable manner.

However, the park has now become reliant on the
fee system. The park is financially challenged due to
rising staff numbers and inflation affecting the value
of the $10 fee. There is a moral issue regarding the
fairness of only charging divers and this is preventing
a fee increase. Fee collection for other tourist groups
is perceived as more difficult.

Conclusion

Due to Bonaire being an island, it has distinct charac-
teristics that affect tourism. With few economic op-
opportunities and attractive environments, a reliance on
tourism has evolved. Bonaire's idyllic environments also formed a threat as
the small island began to receive unsustainable num-
bers of tourists. A wide range of growth management
techniques were adopted. Indirectly, visitor numbers
were influenced through limiting bed spaces. Directly,
a maximum number of tourists was set. The most
controversial tool, fee levying, was adopted without
mass opposition and bought many benefits. However
a review of this growth management tool is needed as
inflation and rising costs have diminished the benefits
of the fee. Complacency has evolved with a lack of
new/improved funding ideas. The implications for sites
such as the Farasan Islands need to be addressed.
SWOT Analysis and Vision

6.1 Introduction

SWOT analysis is a common analytical technique to evaluate an area in an integrated manner to provide a systematic basis for decision making in planning and marketing. SWOT refers to: Strengths, Weaknesses, Opportunities and Threats. SWOT analysis focuses on major issues that will likely influence development and does not attempt to include all the minor points. The national tourism plan provided a SWOT analysis of tourism at the national level and this chapter sets forth the SWOT analysis for tourism planning along the Red Sea. Under each of the headings of Strengths, Weaknesses, Opportunities and Strengths, the issues are grouped according to whether they relate to the area’s accessibility, resources, markets or institutions.

The issues raised in the SWOT are drawn together into a conclusion at the end of the section.

6.2 Strengths

Accessibility
With regards to air transport the area is served by a range of international carriers and routes through King Abdul Aziz International Airport in Jeddah. This also provides the hub for routes to local airports along the Red Sea including Jizan, Yanbu and Tabuk. There are also a number of local airports without scheduled passenger services.

The central sector of the Red Sea coast has a motorway network in and around Jeddah, with established links to Makkah and Madinah and a developing dual carriageway system south towards Jizan and north from Yanbu. As well as reducing travel times this has improved services on the developing network of coach services.

Resources
The region’s tourist resources are concentrated in the major resort of Jeddah, with international standard hotels, shopping malls, restaurants and the impressive corniches with their outstanding examples of public art. These are supported by a range of family leisure parks and the major Jeddah Festival. Yanbu is also developing resort facilities, particularly around the Sharm and small scale resorts and hotels have been established in Jizan and on Tabuk’s coast.

However the Red Sea’s greatest asset is the varied and unique ecosystem of the Red Sea itself, particularly its extensive and largely pristine coral reefs. These have been described as some of the most spectacular reefs in the world and are accompanied by clear and clean water conditions and important areas for a wide variety of fish life and sea mammals such as whales and dugongs. The associated islands and tidal areas are internationally important bird nesting and migratory areas.

Also of importance is the varied culture of the Hijaz region which covers the central part of the Red Sea coast, with its features of international significance and renown including old Jeddah, the Pilgrim routes and Mada’in Saleh.

Markets
Jeddah is already established as the Kingdom’s leading domestic resort and as the gateway for the annual influx of 2 million Hajji and 3 million visitors on Umrah visits. As an expanding city it also provides the area with a resident population approaching 3 million people. In addition the Red Sea has a high international profile with awareness of its significant conservation importance and appeal, especially among divers and naturalists.

Institutions
A large number of national Ministries and agencies oversee the development and management of the Red Sea and associated coastal areas, from the Ministry of Transport to the Coastguards and from the Ministry of Fisheries to the Ministry of Municipalities and Rural Affairs. The recent powers given to the Supreme Commission for Tourism for overseeing the development of tourism in such areas have to be implemented, but the framework of National and Regional plans are now in place.
In addition many of the Provincial and Municipal authorities along the coast are also active in planning for tourism and providing leisure facilities such as corniches and sports facilities.

6.3 Weaknesses

Accessibility
Access to the Red Sea coast, whether through international air services or via the national motorway network is largely channelled through Jeddah. The poor standard of facilities at King Abdul Aziz International Airport has been recognised and the scale of domestic services to the area are constrained by the presence of just one carrier.

Away from Makkah and Madinah Provinces the coastal road is of variable quality, and the sheer distances involved make access to many locations along the coast very difficult from the main centres of population.

Resources
The development of Jeddah as a major resort to compete with its increasing number of international competitors, is restricted by the short length of the season, (which in turn leads to high prices), the lack of visitor attractions and museums/heritage centres, the limited public access to the sea, and the shortage of good quality, mid-range accommodation. Outside of Jeddah there is a limited range and quality of accommodation, and outside of Jeddah and Yanbu there are no adequate dive facilities.

Within Jeddah there are growing concerns over the deteriorating state of the environment, ranging from vehicular and industrial air pollution to inadequate facilities for sewage treatment and waste management. The latter in particular is having a noticeable affect on water quality and life in affected parts of the Red Sea.

In the more rural areas of the coast, the natural resources are not always suitable for tourism development, with few areas of outstanding visual quality and a limited number of safe, sandy beaches. Many areas with potential are subject to uncontrolled development and unacceptable levels of litter. At present there is no approved Coastal Zone Management Plan and poor enforcement of conservation legislation.

The levels of public awareness of the area’s natural and cultural resources are also very low, both locally and nationally

Markets

The concentration of tourist activity into a short season and small area has limited, and partly caused by, a low level of public awareness of what tourism facilities and resources are available to them.

Internationally, Egypt has invested heavily in the ‘Red Sea Rivier’ brand for supporting its resort development at Sharm el Sheikh and elsewhere along its coastline.

The lack of tourist visas and complex entry arrangements has restricted the development of the international markets.

Institutions
The main institutional weakness is the poor levels of enforcement of existing legislation and poor levels of co-ordination between Ministries and Agencies.

Until recently there has been no domestic tourist promotion of any significance, but recent campaigns by the SCT and on Saudia aircraft have started to raise awareness.

6.4 Opportunities

Accessibility
With the setting up of new airlines within the KSA there is scope for a wider range of domestic and international services. In particular there should be potential for regionally based carriers to provide new links to second and third tier airports such as Rabigh and Al Wajh.

The continuing upgrade of the coastal highways will open up development opportunities in areas, particularly around Jeddah, while the proposed rail link from Riyadh to Jeddah, and the longer term scheme for a Red Sea coastal route will have a similar impact.

Resources
The existing scale and profile of Jeddah should allow for a programme of further development and upgrading, in conjunction with planned environmental improvements and the provision of sport and leisure related events and festivals, to allow it to reassert its title as Bride of the Red Sea. Elsewhere there are many opportunities for the development of high quality diving or water sports related facilities and specific heritage or adventure tourism projects.

In addition there is a major opportunity to provide new visitor attractions, in particular aquariums, nature
reserves and heritage centres, which would improve public awareness of the importance of the Red Sea.

The designation of the Red Sea as a World Heritage site, would provide worthy international recognition, but also require the adoption and implementation of appropriate management measures and resources. It would also boost the necessary domestic environmental awareness campaign, in schools and local communities.

Markets
Internationally there is still an opportunity to distinguish between the Egyptian Red Sea and the Saudi Arabian Red Sea, with the latter having the distinct advantage of the Holy Sites, the Hijaz culture and superior coral reefs.

Domestically the current awareness raising campaigns of the SCT and the establishment of new Tourist Information Centres, need to be quickly reinforced of news of new attractions and visitor facilities

Institutions
The recent empowering of the SCT, with resources and authority to oversee the planning and development of tourist related areas, especially along the coast, provides the opportunity to tackle the current problems of poor enforcement of planning and conservation legislation and the lack of joint working between agencies. These improvements can come about through using the benefits of tourism development and expenditure rather than forcing co-operation.

In particular the roles of the new Provincial Tourism Authorities will be key and need to take on a ‘brief’ for the Red Sea in partnership with the SCT, possible through the vehicle of a new ‘Red Sea Tourism Development Agency.’

In addition there is scope for new PPPs (Private/Public Sector Partnership agreements) between public authorities and providers of tourist and leisure facilities, in order to achieve a more integrated, and fundable, approach to development.

6.5 Threats

Accessibility
Improvements to the region’s transport network, particularly new air international air services will make it easier and cheaper for the local population to take foreign holidays.

Improved road access to previously inaccessible locations may introduce problems of uncontrolled development, and over-development, if the enforcement of planning legislation is not in place.

Resources
The provision of higher quality resort facilities, services and landscaping, at cheaper prices, at competing resorts elsewhere in the Middle East and notably the Gulf region, is providing tough competition for the established resort of Jeddah.

However the capacity, or willingness of investors to provide new facilities, is undermined by the lack of enforceable planning controls, which threaten to undermine the value of any new development if the surrounding setting is not of a similar standard.

Likewise, the lack of management capacity along the coast could quickly lead to the deterioration of dive sites and long term damage to the coral, as has been the case at Egyptian resorts, could harm the area greatest natural resource and its image as a destination that cares for its environment.

In general though the main threat to the Kingdom’s Red Sea coast is not tourism, but the general pace and scale of urban and industrial development, leading to damage to coastal lagoons and reefs and increased pollution of air and water

Markets
As well as being tempted abroad by cheaper destinations, the local market are often seeking the more relaxed social atmosphere that resorts in Egypt or Jordan offer, thus leading to a continuing reduction in the competitiveness of even resorts such as Jeddah.

Similarly the difficulty of access for international visitors, may deter even committed sectors of the market such as divers.

Institutions
Continued lack of co-ordination among Government Ministries and Agencies will fail to secure the planning framework necessary to guide the current pace of development that the Kingdom is undergoing and direct into the more sustainable future that the Kingdom and successful tourism require.
6.6 Conclusions & Vision

This SWOT analysis confirms the scale of the opportunities that are opening up to the KSA for its Red Sea coast. However these opportunities will only be maintained for the longer term if they are tackled within a framework of sustainable planning policies and supportive and targeted institutions. The strategy for such development should be driven by ‘Quality’ to ensure that it is:

- Marketable
- Sustainable
- Achievable

So that by 2025 the Saudi Arabian Red Sea will have set new standards in coastal tourism development and management and become the model that other destinations aspire to
Strategic Policy Guidelines

7.1 Introduction

Having set a broad vision for the development of tourism along the Red Sea coast it is then important to set out the policy guidelines within which it could be achieved.

These guidelines cover planning policies, environmental objectives and the treatment of the areas heritage resources.

7.2 Planning

7.2.1 Existing Planning and Development Control Situation

The control of new development in the KSA is based on the need to apply for planning permission for new buildings and development schemes. Generally, the district or municipality authorities receive planning applications for new development in their area. For larger development schemes such as major resorts, these applications are referred to the provincial authorities for decision-making. Notwithstanding this system and development control procedure, there appears to be significant urban sprawl and little control of building construction. Municipal and district development control sections are apparently understaffed. There is also little enforcement of planning or development control transgressions. In effect people generally build what they want and where they want on their own landholdings.

The poor development control policies that are evident along the Red Sea coast will increasingly lead to an imbalance of tourism facilities, poor economies of scale and environmental neglect all of which will undermine the tourism resource potential of the region. Whilst some parts of the coastal areas that were visited are worse than others, sprawling urban development and half-built structures, are typical, especially in and around towns. This situation will be exacerbated if no action is taken to address this problem.

Development control policies clearly need to be effective and to be set within both short and long term forward planning policies at the regional, provincial and local levels. This is particularly important where tourism is dependent upon marine and ecotourism resources. Effective development control policies are therefore required in tandem with strict environmental protection measures. In order for this approach to be effective, a broad range of participants need to be incorporated into the environmental and development control process that includes government departments, major private sector developers and local communities.

7.2.2 Proposed Coastal Development Zoning

The Red Sea coastal area needs to be zoned according to land use and environmental protection requirements that take into account the existing tourism resources. The zones themselves need to be determined according to estimated carrying capacities that would apply on a sub-regional or district-wide basis. Whilst there is no definitive measure for establishing carrying capacity, generalised criteria for the coastal zone should begin by using the marine resources and their related environmental sensitivities as a starting point. Zones should therefore have development control and environmental protection measures that are appropriate to the established environmental sensitivities and local development conditions.

In the Saudi Red Sea coastal area there are three designated Marine Protection Areas (MPA), whilst the Regional Organization for the Conservation of the Environment of the Red Sea and Gulf of Aden (PERSGA) and the National Commission for Wildlife Conservation and Development (NCWCD) have proposed another 32 MPAs. The existing MPAs are: the Yanbu Royal Commission MPA (protected by the Jubail and Yanbu Royal Commission) which covers roughly 5km2 and encompasses fringing reefs, mangroves and seabird nesting; the Umm Al Qumari, which covers only 2km2 in the southern Red Sea and has two small islands with surrounding fringing reefs with an important habitat for thousands of seabirds; and
the Farasan Islands, which covers 3,310km², and is an important habitat for mangroves, sea grass, coral reefs, marine mammals, marine turtles, seabirds, and the Arabian Gazelle.

The proposed coastal development zoning and their characteristics are as follows:

A) Conservation and No-development Zones: These are environmental conservation zones where marine environments are endangered or highly sensitive to population or development pressures. These areas should include PERSGA’s and the NCWCD’s identified MPAs and proposed MPAs. These areas should have a moratorium on new building or strict ‘no-development’ controls. Only coastguard and environmental research facilities should be allowed, together with, for example, any improvements to village fishing access points/piers. Any existing development in these areas should have effective sewage disposal facilities provided. No outfalls from nearby development (that may lie outside the conservation zone) should be located within these zones. Furthermore, any effluent that is pumped into these areas, from outside the ‘no-development’ zone must be treated. There would also be access restrictions into these areas, based on permits and fee payments.

B) Restricted Development Zones: These are zones where there is very limited development permitted. They could adjoin the above Conservation Zones and could act as buffers between those environmentally-sensitive zones and other less-restricted development areas. Very limited and strictly controlled development, such as some small-scale tourism resorts, could be permitted in these zones. Similarly, where there are existing settlements then some restricted infill development could be permitted. Existing development should have new water treatment facilities provided. If any proposed new development is to be permitted then it should be done so with the proviso that water treatment facilities are provided. No sprawling settlements should be allowed and these areas, together with the ‘no-development’ zones, must be priorities for effective solid waste management programmes. The emphasis in the Restricted Development Zones would be on environmental improvements and upgrading.

C) Limited Development Zones: These are areas where there is already significant development, but where there are major environmental or conservation issues, for example along the coastline north of Jeddah or close to Yanbu. In some locations such as the North Obhur Creek or the Yanbu corniche area there is significant pressure for resort development. Whilst development control policies need to accede to some of these demand requirements, it needs to do so with environmental sensitivities in mind. Thus new developments should be land-sensitive and not sprawling. They should adopt other conservation principles that adhere to sound waste treatment, solid waste management and recycling initiatives. Half-built structures should be demolished and planning consent needs to have a timescale for development completion (probably no more than five years). Non-build zones should separate some of these development areas in order to avoid urban sprawl, especially along the corniche stretches of the urban coastal zones. These non-build zones should be utilised to enhance different characters or areas from one resort, for example, to another. Development extensions and design control needs to be tightly monitored. They should emphasise the need to raise market expectations with improved design and quality of facilities.

D) Development Zones: These zones would include existing development areas, such as Jeddah, Jizan City or Yanbu, where significant development already exists and where there are major utility facilities (such as desalination plants and electricity generating stations). Whilst development is permissible and expansion (to accommodate population growth) encouraged there still needs to be considerable thought as to how existing sites could be better used, for example for higher density development. Again, sewage treatment and solid waste management programmes need to be rigorously adhered to. Typically, in tourism terms, these areas would include gateway, secondary gateway or staging points for visitors and should accommodate mass-market facilities (such as large-scale resorts).

7.2.3 Proposed Development Control Implementation

It is fairly evident that if development control along the Red Sea coastal zone is to be taken seriously that municipal and district authorities need to have the appropriate staffing levels to review planning applications, to make site inspections and to ensure enforcement for non-compliance. Development control sections will clearly need to work in close liaison with those
preparing the land use plans for the municipality and district.

Applicants could pay for the applications submitted in order to support the funding of necessary staff. Application rates could be charged according to a sliding scale based on the proposed uses, site area and the size of the proposed development. In order to make the system work there would need to be strict enforcement measures, a system of financial penalties for non-compliance and a means of demolishing those buildings without consent. Without any adherence to a system such as this, the situation of urban sprawl and non-compliance will continue unchecked with all the destructive consequences on the coastal environment.

An overall authority for the Red Sea coastal area could administer checks on the effectiveness of development control policies from one district to another. This authority could be made up of staff with experience of tourism local authority administration and conservation and would have special powers of enforcement where individual districts or municipalities are unable or unwilling to implement strict development control policies. This approach should be undertaken in tandem with community-based tourism and environmental awareness programmes that make the link clear between environmental despoliation and its ability to undermine livelihoods and earning potential, especially through tourism.

7.2.4 Generic Design Guidelines

*Environmental Planning and Design Guidelines:* Detailed plans and environmental design guidelines need to be provided for tourism-related development and activities, especially in conservation or environmentally-sensitive areas. The preparation of these must be undertaken in conjunction with SCT, NWCD, MOMRA and the relevant provincial and district authorities. Guidelines and standards must be linked to strict enforcement, and development control requirements, with the issuance of permits and or penalties for failure to comply. The following actions should be undertaken as part of the preparation of tourism plans and overall design guidelines in environmentally-sensitive areas:

- Establish what the development and conservation objectives of the nature reserve, for example, are and what relevant plans and development strategies exist for the area;
- Estimate visitor demand projections for the proposed facilities. Determine the visitor facilities needed and space requirements. This should include a visitor use organisation and flow pattern. Identify visitor facility zones based on the likely intensity of use. Establish site carrying capacities based on proposed visitor usage and activity patterns proposed;
- Consider existing conditions and communities and how they should interact with the proposed attraction, including possible benefits for the local community. Implement environmental educational awareness programmes where potential conflicts could occur between the proposed resorts, for example, and host communities;
- Formulate a tourism development plan that includes the preparation and evaluation of options, the selection of a preferred plan, working up detailed schemes and an implementation programme for development phasing. The planning and zoning of uses and visitor activities must clearly relate to the ecological sensitivities of wildlife and natural landscape areas;
- Prepare building design controls and guidelines (height, massing, setbacks and use of materials). Buildings should be one storey in height, in environmentally-sensitive areas, and be no more than two storeys high in low-lying coastal areas, for example. Buildings should be constructed in local materials wherever possible. However, there may be merit in constructing buildings in flat exposed environments with lightweight modern materials, for example, which can use steel and glass to visually reduce the bulk of the building. Environmental measures such as solar panels, energy recycling and water cooling measures could be used to keep the building temperatures low during summer days and warmer during nighttime;
- Maintain major views and vistas in relation to the location and design of viewpoints and their facilities;
- Protect important natural features. Identify what environmental conservation measures can be undertaken in conjunction with the proposed tourism attraction. Impacts from construction and visitor activities upon landscape, vegetation and wildlife must be minimised. For example, any development in visually-prominent locations should be screened, preferably with new landscape planting;
- Ensure the proper provision, location and design treatment of utility facilities for visitor attractions and their environs (sewage treatment facilities, water supply and purification systems, electricity sub-stations and power lines, telephone lines). These should use environmentally suitable solutions such as micro-filtration water treatment.
facilities that can be easily installed at low cost, for example. Utility facilities should be screened (preferably with planting), and clean water discharges and extraction must not have a significant impact on existing watercourses (a particularly sensitive issue for the Red Sea coastal environment). Electricity and telephone wires should be placed underground. Recommendations need to be outlined for the proper implementation and maintenance of systems for the collection, treatment and disposal of sewage sludge;

- Provide adequate road access. Generally in nature reserves, roads should be around six metres wide and definitely not more than 7.5 metres wide. They do not have to be surfaced, and packed gravel roads should suffice especially in non-urban areas;
- Ensure that there is proper provision and safety for boating and other water-related facilities;
- Provide appropriate systems and facilities for the collection, disposal and recycling of solid waste. Mechanisms for cost recovery should be identified in order to ensure effective implementation. Solid waste that cannot be recycled must be disposed of in government-approved sites where visual impacts, water pollution and sanitation effects are kept to an absolute minimum;
- Provide and maintain sufficient ancillary tourism facilities, especially washing and toilet facilities, for all visitor attraction areas;
- Ensure the appropriate location, design and implementation of signage, rubbish bins, shelters, seating and interpretative material. The design of these facilities should be themed, appropriate for the location, and constructed of local materials;

7.2.5 Environmental Impact Considerations

Environmental Impact Assessments: Environment Impact Assessments (EIA) must be undertaken for all proposed tourism-related development projects along the Red Sea coast, especially in Coastal Development Zones A, B and C, in order to ensure that there are no serious adverse impacts generated or that mitigation measures are put in place. The EIA must be based on the national or provincial environmental protection law and should include socio-economic factors. An example of the EIA coverage of subject matter is set out in the table below.

Visitor Carrying Capacities: Visitor carrying capacity is a measure of the maximum extent to which a particular tourism site or area can receive visitor numbers without adverse impacts on the tourism experience, or on the long-term environmental sustainability of that area. Whilst it is difficult to quantify, it is nevertheless a fundamental aspect of environmental protection and sustainable development. Carrying capacity is often assessed according to three distinct categories (socio-cultural, biophysical or ecological, and psychological or perceptual), for which the World Tourism Organization (WTO) defines it as the level that can be maintained without damage to the surrounding physical environment, or which creates social, cultural, or economic problems for a host population (socio-cultural); that strikes a balance between conservation and development (biophysical/ecological); and which is compatible with the image of the tourism product and the quality of environmental and cultural experiences that visitors are looking for (psychological/perceptual).

<table>
<thead>
<tr>
<th>Subject Matter and Resource</th>
<th>Evaluation of Impacts</th>
<th>Comments or Mitigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Quality</td>
<td>No Effect</td>
<td>Minor Effect</td>
</tr>
<tr>
<td>Surface Water Quality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Groundwater Quality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Road Traffic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noise Levels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solid Waste Disposal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Archaeological/Historic Sites</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visual Amenity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Natural Vegetation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wildlife and Ecology</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Influencing Factors:**
The assessment of visitor carrying capacities for a particular location can depend on a combination of factors such as:

- The sensitivity of the area’s ecological environment. Thus nature reserves, especially those with a high number of endangered species, would have very low carrying capacity levels;
- The tolerance of tourists in a particular location to be able to accept certain levels of visitor numbers before it detracts from the quality of the tourism experience. This can be based upon the culture and aspirations of those visiting the attraction;
- The tolerance of host communities, as well as political decision-makers, to accept visitor numbers and the desire or need for economic benefits;
- The visitor numbers that environmental and topographical conditions could absorb. Thus the Red Sea coastline’s flat environment, to include mangrove areas, would be better suited for low volume and special interest activities, especially within conservation areas. Beaches typically have higher carrying capacities, although the lack of tree coverage along the Red Sea coast would reduce these capacities. The mountainous environments further inland, in Aseer and Jizan for example, could accommodate higher tourism capacities;
- The extent to which facilities and infrastructure (including layout, design and management measures) can meet demand; and
- Seasonal and climatic changes.

The measurement of carrying capacity can be summarised by Table 7.2 below.

**Mitigation Measures:**
Where visitor levels exceed carrying capacities at tourism attractions, then this can be reduced through a number of measures, such as:

- Zoning tourism areas in order to disperse visitors to other zones, and to reduce the pressure on popular ‘hot-spots’ and environmentally-sensitive areas;
- Providing roads with one-way loop trails in order to increase visitor carrying capacity by avoiding congestion points and by creating a perception of lower density use;
- Landscape screening or other physical design treatment in order to reduce any visual and noise impacts from congested areas or pinch-points;
- Locating visitor facilities, such as car and coach parking, visitor centres, toilets, hotels, restaurants, shops, entertainment and other tourist services in less environmentally-sensitive areas, for example at entrance points;
- Limiting access to environmentally-sensitive areas by providing scenic trails and viewpoints at a distance from them;
- Providing a flexible system of entrance and parking fees in order to respond to visitor quota numbers and carrying capacity conditions. This could be varied according to seasons or times of the day in order to reduce peak period pressures.

**Environmental Monitoring and Quality Control:** Environmental Auditing (EA) evaluates the performance of existing activities and procedures for a given tourism attraction. This activity should be linked to the Environmental Management System (EMS) in place at a destination. An EA for a tourism area should be undertaken by the SCT or provincial tourism authorities in order to provide a systematic and objective evaluation of their performance in protecting the environment, and their compliance with environmental policies,

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Examples of Measurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical</td>
<td>Development density (beds per hectare), intensity of use (visitors per hectare), the ratio of visitors to residents, building coverage and plot ratios.</td>
</tr>
<tr>
<td>Psychological</td>
<td>Perception of crowding and spatial quality, disturbance, conflicts with other uses/activities (behavioural studies and travel behaviour modes).</td>
</tr>
<tr>
<td>Biophysical</td>
<td>Changes in land use, damage to vegetation, disturbance to wildlife, air and noise pollution (EIAs and EAs).</td>
</tr>
<tr>
<td>Social</td>
<td>Extent of visitor numbers and interaction acceptable to the host community (social surveys).</td>
</tr>
<tr>
<td>Economic</td>
<td>Benefits achieved (economic models), employment gains (direct and indirect), opportunity costs, negative impacts and congestion models.</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>Costs of infrastructure provision (cost per head), available capacity (for roads, water, electricity, telephones, water treatment and solid waste management) and shared community benefits.</td>
</tr>
</tbody>
</table>

Table 7.2

**Measurement of Visitor Carrying Capacities**
standards and regulatory requirements. As part of this procedure, a State of the Environment report should be produced which identifies particular impacts and concerns that need to be addressed together with proposed measures for mitigation.

It is essential that environmental auditing, monitoring and enforcement procedures for tourism attractions be integrated into existing government quality assurance programmes (such as the inspection, registration, classification and monitoring of tourism sites). Furthermore, environmental management procedures (and undertakings for their implementation) should be one of the criteria for tourism facility registration and classification. Thus, effective environmental management should help to earn high tourism quality ratings.

Visitor Safety Requirements:
Safety standards need to be developed, especially for any proposed soft and hard adventure tourism activities such as horse and camel riding, desert trekking and boating. For example, boat condition and size, terminal facilities and jetties must be appropriate for the numbers of passengers using them (such as guardrails and safety jackets). Safety inspections need to be undertaken at tourism attractions in order to identify possible visitor safety hazards and make recommendations on measures to reduce risks. Compliance with safety standards must be a condition of tourism facility licensing and quality assessment.

Environmental Awareness Programmes:
Although visits to nature based tourist attractions are not yet well established in Saudi Arabia, environmental awareness programmes and information on conservation projects need to be provided for any such projects. Codes of conduct should be prepared for visitors to the nature reserves, for example. This should cover codes of behaviour in local communities, as well as activities in the nature reserves. These could be supplemented by short briefing sessions for visitors by tour guides. The private sector travel trade must be involved in the preparation and dissemination of codes of conduct that could take the form of one-page briefing notes issued to those participating on tours as well as verbal briefing sessions.

Capacity Building and Training: Training programmes, workshops, the preparation of manuals and overseas site visits should be undertaken. Attendees must include relevant members of the nature reserve agencies, government and provincial authorities. If environmental planning and eco-tourism, for example, is to be the focus then this should concentrate on the following subject areas:

- Environmental planning and design guidelines and the evaluation of tourism project proposals;
- Environmental impact assessments, environmental audits, visitor carrying capacities, and the environmental management of tourism attractions;
- Community-based tourism projects, environmental awareness programmes and tourism codes of conduct, and their effective implementation;
- Planning and design, project implementation, cost recovery systems and monitoring of tourism infrastructure and utilities (especially sewage treatment and solid waste management facilities);
- Visitor safety issues, tour guide requirements, conservation information and interpretative material for tourism purposes.

7.3 Environmental Objectives

7.3.1 Introduction

Having established the legislative and regulatory basis of development and management in the Red Sea and clarified and described the environmental values relating to this area, we can now begin to establish suggested management approaches to tourism development in this area. Additionally, lessons can be learned from the development of similar areas both within the Gulf Region and around the world. In this respect, given the wealth of environmental, social and economic values within the Red Sea area, this represents a unique opportunity to provide forward thinking and sustainable management of the tourism sector that will be the equal of anything in the world.

The overarching vision for tourism management has already been defined. The essence of this vision is to ensure that the Red Sea is provided with state of the art management that will maximise the benefits of existing and potential tourism markets whilst protecting the very values that are critical to support this.

7.3.2 Conservation Principles

The fundamental conservation principles relating to the management of the Red Sea relate to the following:

- The primary objective of all management of the Red Sea area should be to ensure that the values which support tourism (as identified within this report) are actively protected.
- Activities which have the potential to damage or degrade Red Sea values will be identified and made the subject of regulation/permitting. Activities will
therefore be managed to prevent damage to the area or where unavoidable limit adverse impacts to levels will not threaten the overall long term values of the area.

- The management of the Red Sea area should actively pursue an integrated, non-sectoral approach which has full regard to the concerns and aspirations of stakeholders.
- The management of the Red Sea area will seek to ensure that the quality of the “Visitor Experience” is maximised whilst having regard to the longer term sustainability of the area. A rolling programme of monitoring visitor perceptions should support this.

These are the over-arching and fundamental objectives of any tourism plan. They should be considered integral to any future development, as should the objectives and policies of the key legislation and agreements already detailed earlier.

7.3.3 Environmental Values – Management Approaches

The following sub-sections assess the approaches to integrating and managing the core, applied and utility values. For ease of reading, these values are repeated below:

Core Values
- Water Quality.
- Oceanographic Processes (local currents, relation to coral/fish spawning etc).
- Coral Communities.
- Other Invertebrates.
- Rocky Reefs.
- Intertidal Communities.
- Seagrass Beds.
- Algal Beds.
- Finfish Communities.
- Shelfish Communities.
- Cetaceans.
- Other Marine Mammals (Dugong).
- Turtles.
- Birds.

Applied Values
- MPA or other reserves.
- Other designated sites (natural, cultural or socio-economic).
- Protected species.
- Local historical sites or features.

Utility Values
- Recreational snorkelling & diving.
- Recreational swimming.
- Sailing.
- Recreational fishing.
- Beach based recreation.
- Scuba diving tours.
- Organised species (i.e. turtle watching).
- Other eco-tourism based activities.
- Tourism revenue.
- Coastal landscapes.
- Arabian heritage.

It is beyond the scope of this study to prepare the Coastal Zone Management Plan to set out the integrating programme of work, but Appendix A provides further detail on the data required and the appropriate measures that can be taken.

7.4 Heritage Objectives

Introduction

The Brief for this study required a holistic view of tourism opportunities, not just related to resorts or water sports, but covering the cultural heritage of the Red Sea coast area. The aspects that are addressed in this section include:
- historic towns
- forts and castles
- archaeological sites
- cultural landscapes
- cultural routes
- museums
- handicrafts

Historic Towns and Settlements

Old Jeddah
The Al Balad quarter (old town) of Jeddah is not only a city that is of universal significance as a city with some unique characteristics for the region. Today the Al Balad quarter is the focus of preservation projects and a recognised tourism destination. As much as the architecture, it is the life within Al Balad quarter of Jeddah that makes it attractive to visitors, be it the lively souq or the small shady squares where elderly men are gathered in conversation.

Tourism and conservation developments for Old Jeddah are presented in detail in the Jeddah City Tourism Development Plan.

The following considerations should be noted while developing the potential of the old town for tourism:
Conservation techniques remain authentic and works are carried out by due care.

New developments (buildings, hard landscaping and other interventions) are in keeping with the existing fabric of the historic quarter in terms of scale, materials and massing, including plot sizes and morphology.

Ratio of new buildings amongst the old fabric is carefully monitored to ensure the (unique) historic character of the place is maintained.

The biggest attraction of Old Jeddah to visitors is the atmosphere created by human activity and a certain level of chaos. It is essential that developments are sensitive to this and do not over-sanitise the historic environment.

Holy Cities: Makkah & Madinah

Detailed proposals for cultural heritage and tourism development for the two holy cities are covered in the Makkah City Tourism Development Plan and the Madinah Al-Munawarah Provincial Tourism Plan.

Most visitors to Makkah will also visit Madinah and some of the sites of significance to the Muslim world related to the life of the Prophet (PBUH) and the spread of Islam in the surrounding area. Visitors are often unaware of these sites, either because access is problematic or no information is provided. Furthermore there are rarely adequate visitor facilities or any information or interpretation provided at the sites. Many pilgrims and Umrah visitors travel overland between the cities.

There is potential to develop some of these sites, including the Hijra route between Makkah and Madinah, pilgrim routes and battle sites. (see Madinah Al-Munawarah Province Tourism Development Plan for recommendations for a museum and visitor centre at Badr)

Red Sea Coastal Towns

Historic towns along the Red Sea coast, are much smaller than Jeddah in size and have been less well preserved. To a greater extent their historic centres are uninhabited even though they are centrally located. They are nonetheless significant 'identifiers' of the coast, important components of the coastal zone heritage and potentially attractive to tourism. Each of these towns is different in character, setting and position in relationship to the modern day cities that have grown around them. Each represents a unique local style and identity, while collectively contributing to the coastal heritage of the Saudi Arabia's west coastline.

Major historic centres along the Red Sea coast are Duba, Al Wajh, Umluj, Yanbu, Jizan and Farasan. Little remains of the historic centres of Haql and Al Lith.

Traditionally, cities in the Arab world can be divided into two important sections, namely the public and the private areas. The public city is the centre for economic activity, with a wide street network connecting the centre to the boundaries and open public spaces. The private city is the residential areas forming clustered around the centre, with an irregular street network and closed neighbourhoods. Privacy, especially for the family, is an important component of both Islamic and Arab culture. Cities, rural settlements and houses within them have been designed or developed to safeguard this privacy.

When developing tourism in traditional settlements and historic quarters the following considerations therefore need to be made:

- respect for established norms and boundaries for privacy within the urban structure, within neighbourhoods and in individual houses
- permit traditional trading and craft activities to continue without simply becoming a spectacle for tourism

The financial viability of developing traditional settlements and historic quarters for tourism is likely to be the largest restriction for large-scale development. In their current state, the investment costs to repair and restore the buildings, to make the area or settlement safe and to provide some form of infrastructure may be significant. The historic quarters will also require investment in new infrastructure, new water systems, electricity and telephone lines and new road surfaces in places. Another important consideration will be to make places safe for visitors, especially where buildings are close to collapse. More important is to ensure that the proposed protection measures are in keeping with the character of the place and do not distract from the tourist’s appreciation of it.
Conservation issues
- Buildings are in poor condition and a significant number close to collapse
- Inappropriate conservation measures are causing further damage to historic buildings
- Modern developments are encroaching on historic cores
- New buildings within the historic cores are detracting rather than enhancing the character and unique qualities of the areas.
- Most of the historic building are not occupied leading to further neglect and abandon

Tourism development opportunities
- Restore central fort, palace or imara building for use as a local museums or cultural centre, possibly on local history, traditions and handicrafts
- Focus on a cluster of buildings around the central fort or palace to maintain a historic core that can be developed for tourism purposes in collaboration with private initiatives
- Create incentives for local occupancy and trade in parts of the historic quarters, in order to maintain a ‘living’ environment.
- Integrate the built heritage with the wider cultural heritage, including handicrafts and soft culture
- Vary the cultural tourism offer in each of the towns to provide a diverse experience for visitors and an incentive to visit the other towns
- Link the towns in terms of promotion as well as cultural activities (e.g. a coastal festival that is shared between several of the towns)

Inland historic towns
There are also a number of significant inland towns that are already known as a destination or could be developed as such. Tourism development and conservation proposals for these towns and settlements have been put forward in the Provincial Tourism Development Plans as listed below:
- Tabuk - see Tabuk Province Tourism Development Plan
- Al Ula - see Madinah Al-Mukaramah Province Tourism Development Plan
- Taif - see Taif City Tourism Development Plan
- Rej Al Alma - see Asir Province Tourism Development Plan

Forts and Castles
Forts, castles, defensive structures as well as palaces make up a significant part of the cultural heritage of the region. Most were built to protect the pilgrim and trade routes (inland and along the coast) and provide lodgings. They date back to the Abbasid and Ottoman periods, with several more recent examples from the time of King Abdul Aziz. In city centre locations, they are commonly located in areas where the last remnants of the urban vernacular survive, providing an opportunity to develop a cultural core around them and use them as museums or visitor centres (e.g. Tabuk, Dhuba, Al Wajih).

In other places there are opportunities to restore and develop forts as tourist attractions in the form of boutique/heritage hotels, traditional restaurants and cafes.

Conservation issues
- Only a very small number of castles and forts have been repaired, most others are protected by fences but are not being maintained and are rapidly decaying, especially those in remote and hostile environments.
- Pilgrim routes are no longer on present day main roads, so important buildings are no longer easily accessible
- Building materials, especially the coral blocks common to the region are prone to rapid decay when not maintained. The repair and maintenance of these often substantial structures is costly, especially when no viable use can be seen for their future.
- The large structures of the forts, when not maintained, are dangerous to public safety for visiting

Tourism development opportunities
- Develop as city museums or visitor centres in city centre locations
- Develop as restaurants and rest stops in city centre locations or on main roads.
- Develop as authentic boutique hotel(s) where they are located in close proximity to tourism centres (e.g. coastal resorts, areas of natural beauty)

Archaeological Sites
The archaeology of the region bears evidence of a great number of civilisations that either inhabited the region or traded with it. Archaeological evidence has been found in the region from prehistoric settlements through to Libyrian, Saba, Nabathean and Roman periods amongst others. The type and quality of archaeological remains can be very varied. With several exceptions most sites have not been excavated, although they are surrounded by protective fencing.
7. Strategic Policy Guideline

Conservation issues
- Archaeological sites are often only protected by a fence and are vulnerable to vandalism.
- Most sites remain unexcavated and should remain as such until adequate measures for their protection are in place. In the meantime their location and surrounding area should be protected from development, vandalism and further decay where exposure is an issue.
- Archaeological surveys should be undertaken before coastal areas are opened up to resort development.

Tourism development opportunities
- For Mada’in Salah and other archaeological sites in the surrounding area a management plan should be prepared in accordance with UNESCO guidelines. The management plan will create a framework from which the site and its surrounding landscape can be developed without being compromised.
- Provide a visitor centre, adequate visitor facilities and interpretation of (see international best practice) at Mada’in Saleh and surrounding sites.
- Improve access, visitor facilities and interpretation at archaeological sites that are already open to the public and/or are on major routes and in close proximity to tourism areas.
- Identify archaeological sites in areas that are in close proximity to tourism areas, and if excavated might be of interest to visitors.
- Introduce interpretation or information panels that can be placed on the fences of unexcavated sites to inform tourists and locals of the significance of the site.

Underwater Archaeology
The Red Sea has been used for transport since prehistoric times and was an important part of the sea trading routes of the 16th to 18th centuries. There is evidence of shipwrecks in the Red Sea and where underwater archaeological expeditions have taken place the findings have been impressive and historically significant. There is a known wreck at Yanbu, but the entire coastline has not been fully surveyed to be able to determine the presence of other wrecks which are highly likely.

Conservation issues
- A full survey of the coast will help identify the location of wreck sites and ensure they are protected before they are further looted by divers.
- Newly identified and known wreck sites need to be designated as protected zones and no access permitted for SCUBA diving.

Tourism development opportunities
- The findings of a wreck, the wreck itself if it can be raised and the process of doing so will fill a substantial exhibition space and lend itself to related interactive displays and various other themes. Wreck and maritime museums often prove to be popular attractions for families.

Cultural Landscapes
Cultural landscapes include designed landscapes, such as historic gardens, organically evolving landscapes and relict landscapes such as irrigation and field systems or linear industrial features, which preserve historical or archaeological evidence of specific human activities. Cultural Landscapes are one of the categories that are accepted by UNESCO in the World Heritage Convention.

Cultural landscapes of the region include:
- Mada’in Saleh desert setting
- Desert setting of the pilgrim routes, including wells, castles and other defences
- Desert setting of the Hijaz Railway including the line of the railway and railway buildings
- Tihama plane
- Asir hills, with traditional stone buildings, defence structures and settlements
- Fayfa and other terraced hillsides in Jizan Province
Conservation issues
- Cultural landscapes are being compromised by inappropriate and insensitive new developments within them or encroaching on them
- The integrity of cultural landscapes is being threatened by disregard for their value and new developments stemming from the private ownership of land

Tourism development opportunities
- Cultural landscapes need to be recognised as part of the visitor experience and development control measures implemented to protect them
- In places the cultural landscape is the attraction (e.g. terraces in Jizan Province) and can be developed for tourism as part of trekking expeditions, nature based resorts or agrotourism with minimum intervention

Tourism development opportunities
- Marine routes from Egypt came into the port at Yanbu and later Jeddah (and possibly other ports)
- Coastal routes
- Pilgrim routes from the Gulf coast and the Najd
- Darb Al Fil from Yemen along the mountain ridge
- Yemeni coastal route

Routes linked to the life of the Prophet Mohammed (PBUH)
- The Hijra route between Makkah and Medinah
- The road of the Battle of Tabuk
- The route to Taif

There are also other cultural heritage attractions that repeat a common theme that could be combined either with these said routes or linked for development and marketing purposes. These might include:
- Historic forts (also linked to the pilgrim routes)
- Coastal historic towns

Cultural Routes, Linear Heritage
There is a tendency in cultural heritage management to view monuments and sites as singular destinations. There is a growing recognition that not only places but lines or a group of features can be promoted as heritage and cultural routes are being designated as World Heritage Sites. For tourism the development of linear attractions can provide added value, but also present new challenges in organisation, access, interpretation and marketing. In some cases it is the route or road that is significant, in other cases it is a series of buildings or sites that are linked by type or association that are grouped. Some routes might be short and regional, while others are trans-national. Many of the cultural routes in the Red Sea coastal region are trans-national.

There are opportunities to develop some of the linked and linear heritage assets of the Red Sea coastal region. These include land and marine routes, including:

Trade routes
- Darb Al-Bakra: the ancient trade route between Mada’in Saleh and Petra
- The incense route from Oman

Pilgrim routes
- The Syrian pilgrim route
- The Egyptian pilgrim route – Sultan wells near Dhuba and group of ten near Al Wajh dating back to the 14th and 15th centuries
- Darb Zubaidah
- The Hijaz Railway

Conservation issues
- The routes are not being protected or maintained as an entity. In places sections of the routes are lost because the land is in private ownership and may have been developed.
- The routes need to be recognised as cultural landscapes

Tourism development opportunities
- Focus on major nodes where the routes converge (e.g. Mada’in Saleh) or are linked to other tourism attractions
- Develop a system of linked interpretation panels that are easily recognisable related to each route. The panels should provide a map, point out the next location on the route and other places of interest in the surrounding area.
- Development of cultural routes should be phased, starting with centres where there are already existing tourism attractions and facilities, then developing around nodes where several attractions are grouped and activities and facilities can be provided.
- In the longer term the whole or part of a route could be considered for activities such as camel treks. This would still be limited to the specialist markets.
Museums
The concentration of Museums in the Red Sea coastal zone can be found in Makkah Province and inland around Madinah. The primary museums concerning the cultural heritage are the archaeology museums in Al Ula, Taif and Jeddah (Khuzam Palace), the Islamic and Haramain museums in Makkah and several other privately owned museums.

The Strategy and Action Plan for the Antiquities and Museum Sector foresees the following Museum developments in the Red Sea Coastal Zone:
- A new regional museum in Tabuk, also in Abha and Al Baha
- A specialised Museum of the Holy Qur’an in Madinah and a site museum on the Farasan Islands
- A maritime museum, in a location yet to be identified

The Strategy also advocates local/city museums that could ideally be located in converted historic buildings. The centres of the historic coastal towns of the Red Sea all have buildings of this nature, forts, mansions or imara buildings that could be used for this purpose. A museum use at the heart of the historic quarters would focus cultural activities to these areas.

Private and independent museums should be supported and advice provided on the display, management and care of collections.

Conservation issues
- The displays in the regional and site based museums, such as Al Ula Museum, are static and do not provide enough information for visitors to understand the immediate region or sites concerned.
- Training of professionals in curatorial and object conservation skills is necessary for the successful development of museums.

Tourism development opportunities
- There is scope to develop museums of international and national significance on a variety of themes in the region.
- It is essential that each museum is unique and outstanding, and not a repetition or variation of a similar museum elsewhere.
- Museums will need to be more than a display of objects, they must be interactive and enjoyable places to visit, allowing for continuous renewal to encourage repeat visits. They must provide adequate facilities for families and educational material for children.

Handicrafts, Soft Culture, Intangible Heritage
In historic towns and places, an important part of the visitor experience is provided through the often unidentified assets, namely the local community, traditions embedded in the urban culture, cuisine and events. This intangible heritage is even more difficult to preserve and manage than the physical components of urban heritage, yet it is these intangible values that contribute to the character of a place. In many places intangible assets may not be the attraction, but they provide ‘added value’.

Intangible heritage will include:
- The urban form of the Islamic city, which is informed by tradition and belief
- Songs and folklore
- Poetry and literature
- Craft skills evident in architecture, boat building and handicrafts
- Hand crafted objects
- Colours, textiles
- Objects and practices of every day life (e.g. fishing)
- Local produce and cuisine (including local marketplaces)
- Contemporary arts

Food and food culture can be a powerful tool in enhancing the visitor experience.

The traditions of the Hijaz are unique in the Kingdom. They are diverse, rich and carry within them influences from around the globe and especially as a result of trade and the Hajj. Some of these traditions have been described in more detail in the various Provincial Plans.
Conservation issues
- There is no coordinated effort to engage with the intangible heritage and promote it as part of the tourism appeal.
- Without support and promotion, many traditional practices and crafts are in danger of disappearing.

Tourism development opportunities
- Culture, traditions and handicrafts can be permanently displayed in Ethnographic museums.
- There will also be opportunities for travelling exhibitions.
- Focus for activities, including festivals.
- Contemporary appeal will make some crafts and events more interesting to younger generations.
- They can be part of the visitor ‘experience’, such as eating at local restaurants, watching fish being caught or visiting local markets.
- Agro-tourism can be linked to rural customs as well as provide opportunities to appreciate local produce and foods.
- Contemporary and recent arts, architecture and music add to the vibrancy and life of cities as visitor destinations.
8.1 Introduction

Given the framework set out in the previous chapter to ensure the appropriate environmental standards and cultural sensitivities of the type of tourism proposed for the Red Sea, the next step is to determine the appropriate scale and location of the new tourism development.

A forecast is made of the potential growth in the domestic and international tourism markets over the next twenty years and this rate of growth is then applied to the Red Sea zone in particular.

The potential zones where different forms of tourism could take place along the Red Sea are then analysed according to a number of relevant criteria regarding the suitability of their potential development sites.

These are then presented in terms of the nature and phasing of the most appropriate tourism development.

Finally the nature of this organisation required to implement the strategy is set out.

8.2 Tourism Forecasts for the Red Sea

At its simplest tourism forecasting is an extrapolation of past performance into the future, at its most sophisticated it is a complex modelling of how the various factors that influence domestic and inbound tourism are likely to perform and interact over a future period.

Tourism forecasting is particularly difficult in Saudi Arabia due to the lack of such historical performance data until the last few years, because until the establishment of the Supreme Commission for Tourism was established, there was no official recognition of tourism outside of the religious travel linked to the Haj and Umrah. Of equal importance is the dramatic change that is planned to take place over the next few years in the development, administration and promotion of tourism within the Kingdom. Without such historical data and with uncertainty over the success of implementing such a wide range of planned proposals, neither simple extrapolation of tourism data nor complex modelling is possible.

However any strategic plan needs to be assured that there are going to be appropriate markets available for its proposed developments. Therefore this study adopts the same approach used in the preparation of the National Tourism Development Plan and subsequently by MAS in the preparation of forecasts for the SCT. This uses the baseline data on the volume of tourism activity and applies growth rates based on the expected performance of key factors known to have a strong influence over tourism.

The current estimate of the volume of the two main tourism sectors nationally are 7.5 million inbound visitors and 13.4 million domestic. The respective figures for the Red Sea coast are estimated to be 2.5 million and 13.4 million. (The estimate are taken from the same national sources as used in the five Provincial Tourism Plans along the Red Sea coast, and revised to include the following areas:

- **Tabuk**
  - from Haql to Duba, but excluding Tabuk city

- **Madinah**
  - from Yanbu to Al Rais, but excluding Madinah

- **Makkah**
  - Jeddah distric, but excluding Makkah and Taif

- **Asseer**
  - Al Qunfidah and Al Lith

- **Jizan**
  - Jizan City and Farasan Islands

The most recent forecast by MAS (May, 2005) assume a 3.1% growth in inbound tourism and 4.5% in domestic tourism. They would result in the following levels of tourism in 2020, if applied nationally and for the Red Sea (See Table 8.1).
8. Tourism Development Strategy

The World Travel and Tourism Council (WTTC), who have developed the satellite accounting methodology for estimating the importance of tourism within a country’s economy, produce annual forecasts for the Middle East. It is noticeable that for 2005 they were forecasting an increase of 8.5% in international tourism for the Middle East as a whole (similar to the WTO) but a much lower figure of 2.8% for Saudi Arabia.

Table 8.1 Forecasts of Red Sea Tourism to 2020

<table>
<thead>
<tr>
<th>Region</th>
<th>Inbound 2002</th>
<th>Inbound 2020</th>
<th>Domestic 2002</th>
<th>Domestic 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saudi Arabia</td>
<td>7.5 m</td>
<td>13.1 m</td>
<td>57 m</td>
<td>128 m</td>
</tr>
<tr>
<td>Red Sea</td>
<td>2.5 m</td>
<td>4.4 m</td>
<td>13.4 m</td>
<td>29.5 m</td>
</tr>
</tbody>
</table>

However, a large proportion of international visits to the Kingdom are for religious purposes (with the constraints that exist on the number and timing of Haj and Umrah visits) and these account for the majority of Jeddah’s visitors and the international leisure market in Jeddah has been constrained by the lack of tourist visas for the Kingdom itself.

Looking forward though the introduction of tourist visas and the anticipated growth in specialist sectors such as the dive market and cultural visits are positive growth factors, but considering their low base it is difficult to envisage a growth rate much higher than the 3.1% anticipated by MAS. However since much of the business and leisure growth would be taking place on the Red Sea coastal zone, and allowing for the fact that there would be little or no growth in the 2 million Haj market, a higher figure of 3.5% could be anticipated for the Red Sea study area.

Domestic Tourism

The two key determining factors in the growth of domestic tourism in any country are population growth and rates of increase in disposable income. The Kingdom has a high population growth at 2.2% and a marked increase in the rate of recent economic growth (5% in the last two years) since the dramatic increase in world oil prices. These high oil prices look to be settled for a few years thus generating the revenues to fuel a continued high rate of growth.

As with the forecasts in the National Tourism Plan, they have been built on the basis of information on factors such as:

- annual growth rate in the domestic population, and
- official forecasts of per capita income growth.

However, it is worth reviewing such figures as they might apply to the Red Sea, in the context of the particular tourism sectors that are likely to make up the industry in that area and be the main drivers for growth.

Inbound Tourism

Levels of inbound, international tourism to any destination are determined by a number of internal and external factors. Externally these are the propensity to travel among residents of the overseas markets, the accessibility of the destination from these markets, the ease of entry into the country, the provision of services by travel agents and tour operators and, most importantly, the innate appeal of the destination.

Also of relevance to any country’s individual performance is that of the performance of the wider region in which it is located. According to the World Tourism Organisation (WTO) the Middle East, although starting from a low base in 1995, is forecast to have the highest rate of growth up to 2020. This would mean that it would double its share of the world market, from 2.2% to 4.4%, with an average growth rate of 7.1%. This regional growth scenario could be taken as a very positive factor for Saudi Arabia, but there are likely to be considerable variations among Middle Eastern countries, with the highest rates to be found in those with the widest range of new facilities, easiest access and fewest social constraints.
that would not be present in many alternative foreign destinations. Even allowing for the proposals in the National and Provincial Tourism Plans that seek to address the issues of the shortage of suitable accommodation and attractions, the desire of Saudis to holiday abroad in locations such as Egypt, Jordan and Lebanon, it must be accepted that it is a common factor in all developing (and developed) economies that the appeal of travelling abroad is greater as economic well being advances.

Given the high level of political support for increasing the levels of domestic tourism, for the key purpose of providing employment for a rapidly growing population needing work, it can be assumed that efforts will be made to loosen constraints on leisure activities and investment, it is proposed that an annual average growth of 4.5% for the Red Sea area can be adopted.

In conclusion the forecast for domestic and inbound tourism for the Red Sea area are as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic</th>
<th>Inbound</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>13.4m</td>
<td>2.5m</td>
</tr>
<tr>
<td>2005</td>
<td>15.3m</td>
<td>2.78m</td>
</tr>
<tr>
<td>2010</td>
<td>19.1m</td>
<td>3.32m</td>
</tr>
<tr>
<td>2015</td>
<td>23.7m</td>
<td>3.97m</td>
</tr>
<tr>
<td>2020</td>
<td>29.5m</td>
<td>4.74m</td>
</tr>
<tr>
<td>2025</td>
<td>36.8m</td>
<td>5.67m</td>
</tr>
<tr>
<td>% Annual Growth</td>
<td>4.5%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

Table 8.2 Phased Forecasts for Red Sea Tourism

8.3 Tourism Planning Objectives

Proposals and recommendations set out within the Red Sea Tourism and Coastal Zone Management Plan are outlined according to a 20-year time horizon, up to 2025, within which a Five-year Action Plan (to 2010) will include priority projects and proposals.

As part of the strategy for tourism development along the Red Sea coast, it is proposed to fulfill the following objectives:

- To promote environmental and nature conservation as the key element of providing tourism attractions and facilities;
- To provide a range and variety of tourism attractions within the study area;
- To increase the number of visitors to proposed attractions along the entire length of the Red Sea coast;
- To improve the quality of attractions and resorts along the Red Sea coastline.

Together they will help deliver the vision set out earlier, namely:

By 2025 the Saudi Arabian Red Sea will have set new standards in coastal tourism development and management and become the model that other destinations aspire to.

The process by which the appropriate tourism development strategy can be derived from the objectives is set out below.

i) identification of strategic principles
ii) characterise types of development zone
iii) establish Red Sea development zones
iv) evaluation of development sites

Strategic Principles

In response to the particularly sensitive nature of the Red Sea ecosystems and the cultural and religious sensitivity of the related coastal zone, it is important to set out the guiding principles by which the strategy will be prepared and any subsequent development controlled.

The four key principles for the production of a tourism development strategy are:

i) to protect sites of highest conservation interest
ii) to give priority to the sites with the lowest infrastructure costs
iii) to support projects with identifiable markets, existing or new
iv) to promote and protect heritage and cultural resources and activities

Development Zone Types

In order to translate the strategic principles into identifiable zones that can provide an appropriate framework for development control regulations along the Red Sea coast, four categories of development zone have been identified.

These are:

i) Conservation Zones: Areas identified with high conservation value and of such particular sensitivity that there would be a presumption against
8. Tourism Development Strategy

Fig. 8.1 Tourism Development Zones
any permanent tourism development and strict control over any tourism activity.

ii) *Restricted Development Zones:* Areas of high conservation value where some strictly controlled types and scale of tourism development and activity can make a positive contribution to help establish and manage protected areas.

iii) *Limited or Medium Term Development Zones:* Areas where poor infrastructure or inaccessibility form the main tourist markets will limit the potential scale of facilities or delay the construction of larger scale facilities.

iv) *Immediate Development:* Areas where tourism development has already occurred or has the space and infrastructure to accommodate larger scale development in the immediate future.

### 8.4 Tourism Development Zones

The allocation of such development zone types to the Red Sea coast is guided by:

- The assessment of current tourism development and infrastructure (Chapter 2)
- The analysis of the marine and coastal environment (Chapter 3)

In order of priority and scale of potential tourism development the following zones have been identified.

1. **Major Resort Development:** Two Zones have been identified in this category. Firstly, there is Jeddah, the area of the Municipality, from Thuwal in the north to Shwaiba in the south, where major tourism development has already taken place and the infrastructure and market accessibility will encourage further development. Secondly there is the Yanbu area of Madina Province, where new resorts, hotels and dive centres have been developed or are proposed, and there is the space and infrastructure to promote further development.

<table>
<thead>
<tr>
<th>Waterfront Quality</th>
<th>Setting Quality</th>
<th>Environmental Sensitivity</th>
<th>Adequate Size</th>
<th>Infrastructure Provision</th>
<th>Ease of Access</th>
<th>Heritage Attractions</th>
<th>Commercial Attractions</th>
<th>Range of Events and Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haql</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Magne</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Ros as Shaikh</td>
<td>High</td>
<td>Med/High</td>
<td>High</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Qiyal/Sharma</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Dhiba</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Al Wadi</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Unhaj</td>
<td>Medium</td>
<td>Low</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Sharm Yanbu</td>
<td>Med/High</td>
<td>Med/High</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Medium/Low</td>
<td>Medium</td>
</tr>
<tr>
<td>Al Rais</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Marubah Beach</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Thuwal</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Medium</td>
</tr>
<tr>
<td>Obhur Creek northwards</td>
<td>Medium</td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Northern Corniche</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Middle Corniche</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>South Corniche</td>
<td>Low</td>
<td>Medium</td>
<td>Low</td>
<td>High</td>
<td>High</td>
<td>Low</td>
<td>Low</td>
<td>Medium</td>
</tr>
<tr>
<td>Shwaba</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>Low</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Al Lith</td>
<td>Medium</td>
<td>Low</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Shaqayq</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Izizan</td>
<td>High</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Farasan Islands</td>
<td>High</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
</tr>
</tbody>
</table>

*Table 8.3 Evaluation of Development Criteria at Tourism Sites*
2. **Moderate Scale Development**: Some small scale coastal tourism development is currently under-way in the Jizan and Tabuk provinces, but its scale is limited by the poor accessibility to the main domestic markets of Makkah Province and elsewhere in the Kingdom. At suitable sites this could form the basis of medium sized destinations, and the same could occur in the longer term in the coastline south of Jeddah to the Asseer Province.

3. **Restricted Development**: The Farasan Islands is a good example of where a sustainable level and appropriate type of tourism development could actively assist in the management of a marina protected area, through the direct generation of revenue.

4. **Presumption against Development**: The several thousand other islands along the coast are unin-habited, sensitive environments where any new development or tourist activity could have a serious harmful impact. Therefore there should be a presumption against development on these Red Sea islands unless there is a strong case for tourism to assist in their protection.

8. **Tourism Development Strategy**

8.5 **Tourism Development Sites**

The aim is to establish a clear prioritisation for potential resort sites within these zones. For this exercise a ‘resort’ means a large single accommodation complex (min 100 room/villas) or a group of smaller hotels.

**Strategic Criteria**

The criteria used for the selection of development priorities from among sites identified in earlier studies or during the course of field work for this study are as follows:

- **a)** an attractive waterfront
  (clarity and cleanliness of the water, sandy beach, interesting views to sea);
- **b)** an attractive setting
  (attractive beachfront vegetation, coves, headlands, scenic backdrop eg mountains or desert);
- **c)** low environmental sensitivity
  (presence or not of protected areas);
- **d)** adequate size
  (minimum of 10ha. for individual hotel, 100ha for medium scale resort);
- **e)** adequate infrastructure
  (accessible to primary road network, regional airport);
- **f)** easy access for customers
  (air services, good secondary road network);
- **g)** nearby heritage/natural attractions
  (easy access to local sites of historic or environmental interest);
- **h)** nearby commercial attractions
  (easy access to amusement parks, shops) and
- **i)** events and sports activities
  (tourist related festivals, sporting events etc.)

The following table sets these criteria against those potential resort sites, grading each site criteria, high, medium or low, according to the judgement of the study team.

A numerical weighting of this evaluation, according to the following scores:

- **High** 3
- **Medium** 2

helps to quantify the development potential of sites within each of the zones and allows a clear prioritisation of opportunities.

The following groupings can be identified.

**i)** Potential for Major Development (20 + points)

- Sharm Yanbu (21.5)
- Thuwal (20)
- Obhur Creek and northwards (22)
- Northern Cornich (Jeddah) (25)
- Middle Corniche (Jeddah) (26)

**ii)** Potential for Medium Scale or Longer Term Development (17-19)

- Qiyal/Sharm (17)
- Duba (17)
- Unhuj (17)
- Al Wajh (17)
- South Corniche (17)
- Shwaba (17)
- Jizan (18)

**iii)** Potential for Smaller Scale Development (16 and under)

- Haql (15)
- Magne (12)
- Ros as Shaikh (12.5)
- Al Rais (16)
- Muruba Beach (12)
- Al Lith (12)
- Shuqayq (14)
- Farasan Islands (14)
8.6 Tourism Development Strategy

As an initial step in this overall strategy for tourism development, it is proposed to take full advantage of the KSA’s relaxation of rules for hajj and umrah visitors who are now allowed to extend their stay, rather than the previous requirement to leave Saudi Arabia once their pilgrimage has been completed. Consequently, opportunities arise for pilgrims to visit coastal attractions following their pilgrimage visits. This would provide a sound platform for subsequent visitor growth up to 2025.

Gateways: Jeddah, and its international airport (King Abdul Aziz International Airport), is currently the main gateway for visitors to the Red Sea coastal area, principally because of its proximity to Makkah. There are currently an estimated two million hajj and three million umrah visitors that pass through Jeddah per annum. There is little reason to see Jeddah’s primary gateway role changing up to 2025. However, the airport facilities need to be upgraded and expanded in order to secure the city’s position as the main visitor gateway and subsequent primary launch-point for trips to other attractions long the Red Sea coast (see Appendix I: Red Sea Coast Tourism Framework). The airport was originally planned for 12 million visitors per annum and this total number of passengers was received through the airport in 2004. It is forecast that this figure will grow to 15 million passengers by 2010. Consequently, improvement proposals of up to US$1.5 billion are planned for the airport.

Secondary gateways in the Red Sea coastal region are considered to be the following:

- Makkah: The main visitor attraction in the region and entry point/gateway for those visiting by car and coach from the eastern part of the country.
- Jizan: Jizan’s domestic airport (Prince Abdullah Bin Abdulaziz Airport) has been recently improved and serves as a secondary gateway for those visiting the Fayfa area and the Farasan Islands. It is also a gateway point for visitors driving from Yemen.
- Madinah: The airport of Madinah (Prince Mohammad Ibn Abdulaziz Airport) provides a secondary gateway, with some international as well as domestic flights, for those visiting the local areas religious and heritage attractions. There are proposals to improve the airport.
- Yanbu: There is a small airport at Yanbu and also a port that receives some hajj pilgrims. Whilst the road improvements from Yanbu to Madinah and Jeddah have reduced demand to fly to Yanbu, it is expected that future demand will require improvements to the airport.
- Duba: The port of Duba provides a secondary entry point for visitors arriving by ferry, principally from Egypt (Hurghada in Sinai).
- Tabuk: The domestic airport of Tabuk, has been recently improved, and provides a secondary gateway for those visiting this province’s attractions. Further improvements are planned including the separation of military and civilian facilities.
- Haql: This border-crossing town forms a major entry point for visitors arriving from Jordan.

Access Routes and Attractions: The Tourism Framework (Fig. 8.2) shows the primary routes and attractions in the coastal region. This should form the basis for a future tourism strategy. The road network throughout is generally of a very high standard. Highway 5, much of it in dual carriageway, links up the main attractions and coastal towns along the entire 1,850km-length of the coastline. These attractions are principally diving and resort areas, especially in Maqna, Ras as Sheikh Humaid, Qiyal/Sharma and Al Wajh in the northern section of the Red Sea Coast. Umuj, Yanbu, Ar Rayis-Badr, Durrat al Arrous and Jeddah provide similar resort and diving attractions in the central section. In the southern section these are Huraidah and the Farasan Islands. These attractions are complemented by the old city heritage cores of Duba, Al Wajh, Yanbu and the Al Balad area of old Jeddah.

A parallel route further inland that connects mountainous areas south of Jeddah (Highway 15) and, to a lesser extent, desert regions north of the city (via Madinah), provides options for visitors from the coastal areas to gain access to different attractions some 50kms further inland. These attractions would include built heritage and natural scenery in Fayfa, Khamis Mushayt, Tanomah, Tihamah, Bani Said and Taif to the south of Jeddah. To the north of Jeddah, the former Hijaz railway line provides some remnants of railway heritage between Tabuk and Madinah. However, of major importance for visitors are the Mada’in Saleh Nabataean ruins and the Al Ula and Al Khuraibah archaeological sites.

In order to provide easy vehicular access so that visitors can alternate between coastal and inland attractions, there needs to be good cross-connecting links between the two parallel routes (principally Highway 5 and Highway 15). This should provide a choice of routes and circuits for visitors. In the south these inter-connecting links do exist but are constrained by steeply-sloping escarpments that rise quickly up to the mountains.
Nevertheless there are reasonable routes from Jizan via Ad Darb (near Huraidah) to Abha (along Highway 10). Further north Highway 246 provides a link from the coast (at Al Mudhaylif) through the mountains to Al Baha.

In the northern half of the Red Sea coastal area there are very good roads that connect Jeddah and Yanbu with Madinah. A recently-built highway links Yanbu directly with Madinah. North of Yanbu good east-west cross-connections are not found until that from Duba to Tabuk (Highway 10), and from Tabuk to Haql and Ras as Sheikh Humaid (via Highways 15, 354 and 5). This gap in cross-connections is expected to be satisfied with the completion of the proposed Al Wajh to Al Ula/Madain Saleh road that will be completed this year. A new link road from Tabuk to Sharma is also nearing completion. There is a need for an improved north-south connection from Al Ula and Madain Saleh to Tabuk that would roughly follow the Hijaz railway route in order to complete that northern sector circuit. It would also open up access to some of the remnants of this heritage rail link. This would halve the journey distance from Al Ula to Tabuk that currently has to take an extended route via Taima.

In summary, these routes and circuits would provide access to a mix of primary diving and resort attractions, spectacular natural mountainous and desert scenery, significant built heritage and archaeological attractions, and of course world-renowned religious destinations in Madinah and Makkah.

8.7 Priority Action Areas

It is proposed that the Red Sea Coast Tourism Strategy should focus on a number of priority areas for action. These are selected according to a combination of primary attractions and opportunities for tourism development that would promote the objectives set out in Section 4.1 above. These priority areas would form the basis for the Five-year Action Plan that would be implemented during 2006-2010. They are as follows:

a) Jeddah Al Balad (Old City): The historic old city area of Jeddah is clearly a primary attraction, both within the city as well as along the Red Sea coastline. Generally, the old city area has maintained its urban form and character. Whilst many buildings have been lost, a few have been restored and a number are still in reasonable condition. As part of the work being undertaken by the Jeddah Historic Area Preservation Department, it is suggested that the programme of on-going conservation work should incorporate tourism facilities that would help to bring income and additional interest into the Al Balad area. It is vital that this conservation work continues and that funding is forthcoming for this into the long term. It is also essential that the area’s vibrant character be retained in order to maintain the area’s attractiveness to visitors.

Links must be opened up from the old city to the Al Arba‘en Lagoon area to the north. This area is likely to be a focus of development interest as part of the overall upgrading of the corniche facilities in Jeddah. It is recommended that the new aquarium for the city should be located in this area. It would consequently provide a new impetus for development interest in the lagoon area, perhaps in the form of floating restaurants, waterside recreation and shopping facilities. This area would need to have strong pedestrian links to the Al Balad area in order to help draw visitors into the old city.

Tourism routes, or heritage trails, should be identified through the old city. These should link the principal attractions including the museum, souqs and handicraft areas. The routes should be improved with directional signage, lighting and streetscape treatment that should utilise simple stone paving. Good examples of this can be seen in Aleppo, and to a lesser extent in Damascus, in Syria. A tourism information centre is proposed to be located near the North Gate that would provide an entrance point for those visiting from the Al Arba‘en Lagoon area.

Many of the restored buildings could accommodate tourist-related facilities such as small hotels, restaurants, museums and speciality shops. Section 10 provides some ideas as to the form and design of a prospective boutique hotel. However, care must be taken to avoid gentrification of this area that would drive out many of the low value uses that contribute so much to its vibrant character. Restaurants and hotels would help to maintain nighttime life in the area and to open up restored buildings to public access. Improvements must maintain a balance between keeping low rental, mixed use and fine grain uses and injecting much-needed income into the area with higher value tourist-related activities.

b) Jeddah Corniche Improvement Plan: The Jeddah Corniche needs to be upgraded and revitalised with
imaginative architectural and landscape schemes. This should include a variety of shaded areas (with trees and shelters); creative fountain and lighting features that are imaginative and perhaps artistic in nature; facilities such as cafes and shops along the main sections of the North and Central Corniche; perhaps some internalised facilities within glass and steel structures accommodating shops, cafes and restaurants along the seashore. Seating and picnicking areas should be allocated according to different sections: be it family or bachelor areas. An important element of this revitalisation process would be the improvement of leisure facilities along the North and Central Corniche sections. These could include major facilities such as ice rinks and bowling facilities, water parks, health spas, watersports facilities, indoor sports facilities and theme parks. This should include a proposed aquarium to be located in the Al Arba’en Lagoon area. An overall plan for the Corniche should be prepared within which sections should be put out to tender to Saudi and international designers and landscape architects.

c) **Thuwail Development Area**: Thuwail, has been identified as a site for one of the six satellite towns that would accommodate Jeddah’s metropolitan growth. It would be better to locate the proposed new town further inland, perhaps on the Es junction to Thuwail, and to keep the coastal area strictly as a limited public resort area only. This should be supported, although care needs to be taken with development scale and a clear and realistic phasing programme should be implemented that matches demand. Resort development on the Thuwail coastline should be separate from the proposed satellite town and facilities should aim to break the mould of a mediocre standard that appears to be common along the Red Sea coast. An opportunity exists to build high quality resort facilities that could attract high-spending domestic visitors. The resort could also incorporate an environmental awareness theme with some visitor attractions oriented towards conservation and marine protection.

d) **Farasan Islands**: Good opportunities exist for providing a high quality beach resort that is oriented towards the diving market. The resort theme could also focus on the general environmental attractions of the islands global Marine Protected Area: the coral reefs and sea grass beds; the population of dugong and turtles; the Arabian Gazelles found on the main island; and the islands bird life. Thus, whilst there is potential for diving-led tourism this market should be broadened to attract those interested in conservation and environmental protection. The dangers of opening up access to the islands too widely would be to undermine the conservation importance of the area. There are many other areas along the Red Sea coastline, that are not so environmentally vulnerable, that could attract a broader mass market.

Whilst the main Farasan Island southern coast, with its sandy beaches, provides much potential for accommodating some small beach resorts, there are two principal disadvantages: the location of some visually imposing utility facilities (a desalination plant and an electricity generating station); as well as the fact that the most attractive diving sites are understood to be located in the northern part of the island group which would make boat trips from southern coastal resorts inconvenient. Given that diving would be the pre-eminent attraction in Farasan, with other attractions being secondary add-ons, this is a significant issue. Consequently, locations in the north of the main island should be considered for a diving resort hotel. As for other proposed hotel resorts the design and standard of the facility must attempt to break the mould of current provision. The resort design and layout will also need to create some visual interest, either in landscape or architectural terms, which will enhance an otherwise visually featureless environment.

e) **Yanbu Sharm Area**: The extensive corniche strip along the northern coastal area of Yanbu, complete with dual carriageway roads, street lighting, some amusement arcades and play areas, beach resorts and limited landscape treatment, threatens to spread north and engulf the attractive environment of Yanbu Sharm. This area has very attractive desert coastal scenery that is evocative of an ‘empty quarter’ image with a backdrop of mountains and high sand dunes and should be preserved at all costs. However already a major resort development is planned in this area. The principal concern with both potential and existing development in the Yanbu Sharm and corniche area is that it will degenerate into sprawl, will offer facilities of similar quality (and therefore little effective choice), will be environmentally damaging, and will undermine the beachfront landscape quality. Consequently, new development in the Yanbu Sharm area should be small-scale and should focus on high quality design of facilities and high spending markets rather than target a mediocre mass-market appeal.
f) Haql to Al Khuraibah Area: The Haql to Al Khuraibah stretch of coastline has much potential for small resort development. Temperatures are much more pleasant during the summer than further south along the Red Sea coast and the proximity to Jordan offers the prospects for new markets. The coastline also has a variety of interesting desert environment with a mountain backdrop. There are also views across to the mountainous Egyptian Sinai coastline. There are two strong prospects for short-term resort development, namely:

- An attractive bay with a broad sandy beach, coral reefs and rising hills, just south of Wadi al Homaidah;
- Al Khuraibah Bay that has a broad sandy beach that slopes gently into the water with some patches of coral just offshore. There is also a backdrop of high sand dunes and groups of dome palm trees providing attractive features and naturally-shaded areas.

Both areas offer potential for water sports, diving/snorkeling, sand yachting, and wadi drives and trekking in the mountain areas some 30kms to the east, as well as other outdoor activities for prospective resort guests.

8.8 Development Opportunities

The following Figures set out the Strategic Framework for the Red Sea as a whole (Fig. 8.4) and for each of the Development Zones (Fig. 8.5 - 8.11), with a summary if the key development opportunities in each zone.

The Strategy Framework provides a geographical perspective to the vision for the Red Sea that emerged from the SWOT analysis in Section 6. The vision is one of opportunities for appropriate forms of tourism development along the complete length of the Red Sea, with the scale and location of the development guided by a combination of market forces and consideration for environmental sensitivities.

This is a sensitive balance but during the workshops held during the preparation of the study there was support from both the conservationists and the tourism developers. Conservationists not only supported the zoning approach that aims to protect the most sensitive sites, but also welcomes the opportunity for tourism development to assist in their conservation objectives, such as would be the case on the Farasan Islands, with tourism revenue helping support management of this internationally important protected area.

Representatives from tourism’s commercial sector, such as hotel operators and developers, also supported the approach to focus opportunities for larger scale tourism development in locations accessible to existing and future markets, which in most cases meant near to the wide range of leisure and retail facilities, notably in the greater Jeddah area.

The vision for a Red Sea tourism product within twenty years, is for:

- Further resort development in and around Jeddah to take advantage of its existing resort infrastructure and developments sites already underway;
- Resort development opportunities at Yanbu;
- International diving resort son the Farasan Islands and dive centres along the coast;
- Smaller-medium sized resorts along the coast form Tabuk to Jizan;
- Restoration and conversion of heritage properties for tourist uses, from disused forts and railways to the historic cores of the Red Sea ports;
- Provision of tourist facilities at relevant conservation sites;
- Small scale community tourism schemes along the coast;
- Major international standard attractions in Jeddah and Mada’in Saleh.
Fig. 8.2 Development Strategy Framework
Zone 1 Jeddah:

- Business Hotels/Airport Hotel/Boutique Hotels in old Jeddah
- Resort hotels on Northern Corniche and around Creek
- Major new attractions inc. Aquarium Maritime Museum, and Aviation Museum
- Old Jeddah TIC and Heritage Centre
- Major nature reserve centre at Rabigh
- Open Space and Sports Strategies

(for potential hotel sites see section 10, fig 10.1)

Zone 2 Yanbu:

- Business Hotels to serve industrial/commercial area
- Range of resort hotels, villas and dive centres around Sharm Yanbu
- Visitor Centre on the Sharm, Heritage Centre in old Yanbu
- Small hotels/eco-lodges along coast

(for potential hotel sites see section 10, fig 10.2)
Zone 3 Farasan Islands:

- High quality dive centre with associated hotel/villa accommodation
- Small resort hotels
- Heritage centre and conservation centre

(for potential hotel sites see section 10, fig 10.3)

Zone 4 Jizan:

- Small/medium sized resort development on coast north of Jizan town eg: Al Qauz/Turbah Shuqayq
- Small community tourism projects in mountains

Tourism Development Site - Aseer/Jizan Provinces
8. Tourism Development Strategy

Zone 5  Tabuk:
- Small resort hotels/dive centres along coast from Haql to Umm Lujj
- Mountain Visitor Centre (Tabuk/Sharm Road)
- Heritage use for Muwelah Fort, north of Duba
- Larger resort development once access improved eg: airport

Zone 6  South Makkah/Aseer:
- Small/medium sized hotels along coast eg: Al Birk, Al Qunfiddah and Al Lith
8.9 Organisational Structure

In order for a successful implementation of the recommendations in this strategy it is necessary to identify the appropriate vehicle to be the champion for Red Sea Tourism. The three main options for identifying such a ‘champion’ are to:

- Establish a new Agency;
- Pass the responsibility to an existing agency; or
- Create a temporary structure within the existing organisational framework.

Section 4 established that there are a range of existing Government Departments and agencies with a particular interest in the Red Sea and its management and development. It is clear that the problem is not one of insufficient authorities or legislation but poor co-operation between them. Therefore it is not recommended that a new Agency, with its own powers and resources, be created for the Red Sea.

The Supreme Commission for Tourism is clearly the agency with the closest interest and most appropriate powers and resources for the sustainable development of the Red Sea. However, simply to add the implementation of this strategy to their existing range of tasks would not do justice to the significance of the project.

Therefore it is proposed, (and the necessary actions are described in the Action Plan), to set up a Red Sea Tourism Task Force (RSTTF).

The main features are that it would:

- Operate under the jurisdiction of the Supreme Commission for Tourism;
- Be given a Five Year Action Plan with accompanying financial resources;
- Be directed by a Board consisting of representatives of other Government Departments and agencies, the Provincial Governors and the newly established Provincial Tourism Organisations;
- Be based on the Red Sea coast;
- Take on operational management roles, such as in the development of visitor facilities in protected areas.
The key roles of a Red Sea body such as the proposed RSTTF should be:

- Preparation of a Five Year Red Sea Tourism Development Programme (RSTDP);
- Securing funding for the implementation of the RSTDP;
- Securing the support from other agencies and Government Departments for the effective integration of the RSTDP into their areas of responsibility and action;
- Ensure the provision of high level staff at the technical and support levels;
- To co-operate closely with the relevant PTOs in raising the profile of the importance of the Red Sea in terms of its importance for tourism and conservation.

The phasing for the establishment of the RSTTF is set out in the Action Plan in Section 12. Firstly, to ensure the prompt implementation of the Action Plan an interim arrangement should consider the secondment of staff from the SCT or other relevant agencies, to cover the key skills of Tourism Planning, Marketing and Administration, with appropriate technical support. They should be given a limited working budget in order to commence implementation of certain items of the Plan.

The second stage is the recruitment of permanent staff for the RSTTF. The initial requirement is for a target of around eleven professional staff, namely:

- Director
- Head of Planning and Development
- Research Officer
- Development Planner
- Product Development Specialist
- Head of Marketing
- Print/Media Specialist
- Press/PR Specialist
- Head of Support Services
- IT specialist
- Finance Officer

The anticipated structure of the RSTTF is set out in the following diagram.

8.10 National Context

If the new organisation is to operate within the jurisdiction of the SCT it is important to assure there is some consistency with the other organisations that are being set up for specific tourism roles within the Kingdom, such as the Provincial Tourism Organisations (PTOs). Guidance for the setting up of PTOs was provided in the National Tourism Plan and subsequently in the Provincial Tourism Plans. The guidelines that should be adopted for a new organisation for the Red Sea include:

- The body should be perceived as a separate entity;
- Its governing body should include representatives from the province and the PTOs, the tourism sector and other Government Departments and national agencies;
- The Governing body should elect its own Chairman;
- It should receive funding from the SCT for providing a specific range of services;
- It should receive technical support from the SCT;
- It should be located on the Red Sea coast.

The key roles of a Red Sea body such as the proposed RSTTF should be:

- Preparation of a Five Year Red Sea Tourism Development Programme (RSTDP);
- Securing funding for the implementation of the RSTDP;
- Securing the support from other agencies and Government Departments for the effective integration of the RSTDP into their areas of responsibility and action;
- Ensure the provision of high level staff at the technical and support levels;
- To co-operate closely with the relevant PTOs in raising the profile of the importance of the Red Sea in terms of its importance for tourism and conservation.

The phasing for the establishment of the RSTTF is set out in the Action Plan in Section 12. Firstly, to ensure the prompt implementation of the Action Plan an interim arrangement should consider the secondment of staff from the SCT or other relevant agencies, to cover the key skills of Tourism Planning, Marketing and Administration, with appropriate technical support. They should be given a limited working budget in order to commence implementation of certain items of the Plan.

The second stage is the recruitment of permanent staff for the RSTTF. The initial requirement is for a target of around eleven professional staff, namely:

- Director
- Head of Planning and Development
- Research Officer
- Development Planner
- Product Development Specialist
- Head of Marketing
- Print/Media Specialist
- Press/PR Specialist
- Head of Support Services
- IT specialist
- Finance Officer

The anticipated structure of the RSTTF is set out in the following diagram.
Marketing Strategy

9.1 Introduction

Before developing in more detail the nature of the tourism product that could be provided on each of these sites it is important to assess the nature of the markets that can be identified as potential customers.

This task is set within the preparation of an overall marketing strategy that looks at the general positioning and branding of the Saudi Arabian Red Sea before addressing the key source markets and their specific requirements with regards tourist facilities.

9.2 The Challenge

As a marketable tourism product, the Saudi Red Sea Coast is at present little more than a vision. The Red Sea has no specific tourism connotations or brand identity within the Saudi domestic market, while to the outside world it is most likely to suggest the area now being promoted as the “Egyptian Riviera”.

Although the Saudi Red Sea coastline stretches for almost 2000 km, most of the purpose-built tourism product is concentrated in a relatively small area in and around Jeddah. Jeddah itself is essentially a busy port and major commercial centre which predominantly serves the needs of a business and government visitor market, although its climate and comparatively relaxed social environment have long made it the leading leisure destination for the domestic market.

The marketing strategy therefore must take into account the time needed to create a brand image, stimulate demand and develop the product in a way that allows this new destination to compete successfully with established world-class resorts. In the short term, while product gaps are filled, constraints addressed and the brand strategy developed, market growth will be slow; in the longer term, growth is forecast to increase much more rapidly as new products and tourist areas emerge, attracting new higher value niche markets.

The first priority is to decide where to position this emerging world-class destination in a competitive marketplace and in relation to the target markets that are expected to supply future growth. Branding must clearly differentiate it from its direct competitors.

The challenge is to create a distinctive leisure destination which offers a high quality experience which cannot easily be found elsewhere, and which appeals to a wide enough market for the product to be sustainable.

Fundamental to the success of the strategy will be a shared vision among all interested parties of the type of destination that is to be created. A major part of the challenge is to ensure that branding, marketing and product development, together with social and business regulation, go hand in hand. Promotion must focus on a selected core of world-class products that can be reliably delivered to target markets.

Finally, in a region which crosses five different provinces, a key issue is the question of where authority will lie for delivering the strategy and protecting the values of the brand. Successful delivery of the long-term strategy will require both a consistent commitment to product improvement and a substantial and continuing investment in marketing support.

9.3 Product and Market Situation

Recent research indicates that leisure visitor numbers to Jeddah and the Red Sea coastal region are stagnant or declining.

Significantly, a growing proportion of high-value Saudi nationals are choosing to take their holidays outside the Kingdom. Saudi families who would traditionally favour the Red Sea region are choosing destinations such as Egypt and Malaysia which offer a better quality and better value leisure product.

Most leisure visitors to the region are Saudi nationals from low-earning socio-economic backgrounds. As
a result the average expenditure per person per stay is less than 900SR, too little to drive significant new development. Apart from the VFR segment, the average length-of-stay is less than a week.

Leisure visitor traffic is heavily concentrated on the main holiday periods, so that for eight or more months of the year occupancy levels are well under 40%, too low to provide an economic return or sustain full-time employment.

In terms of the quality expected of a world-class tourist destination, the region has the benefit of possessing some exceptional attractions that are fundamental to the creation of a distinctive identity: the most notable are its magnificent but unexploited coral reef, the Old Town of Jeddah and other unique cultural heritage attractions, striking desert and mountain landscapes, and a pleasant climate. However, the tourist products and services that can be described as world-class are concentrated in and around Jeddah, and cater primarily for the business traveller.

**Strategic Marketing Objectives**

The loss of high-value markets, low average spending, short length-of-stay and acute seasonality problems are the principal factors in determining the main long-term marketing objectives:

- Position the region as a distinctive destination with world-class cultural heritage and marine sports products, and a growing variety of family attractions and special interest activities, appealing to a diversity of markets.
- Expand the overall volume and value of tourism to the local economy by recovering lost high-value domestic markets and attracting new high-spending niche markets.
- Reduce seasonality by targeting niche markets that are able to travel outside the main holiday periods.
- Disperse visitor traffic along the coastline, where practical, and spread the benefits of tourism to a wider community, by promoting new leisure activities and tourism areas, and making better use of neglected natural and cultural heritage resources.
- Develop a distinctive brand image that communicates the region’s core product strengths.

**Positioning**

Destinations that offer a similar climate, culture and sea-based product are the prime competitors to the Saudi Red Sea Coast. The strengths and weaknesses of competitor destinations need to be taken into account in formulating a positioning strategy, alongside the overriding need to create a distinctive high-quality product with strong appeal to clearly identified markets.

Competition comes most obviously from neighbouring destinations: Egypt, which has successfully used the Red Sea identity to promote its tourism product, and the Gulf states, particularly Dubai, Bahrain, Oman and Qatar, where huge investment has gone into the development of world-class tourism products, which are drawing increasing numbers of high-value visitors from Saudi Arabia. Malaysia has a high-quality value-for-money tourism product which meets the privacy needs of the Muslim family and attracts growing numbers of Saudi families. The leading diving destinations – Australia, the Caribbean, the Maldives as well as Egypt and Israel – offer strong competition for the valuable international diving market.

The issue of the social and regulatory environment cannot be ignored, because it has a direct bearing on the attractiveness of the destination both for visitors and for developers. The rigid enforcement of social regulations - for instance, the separation of families between males and females in public places such as leisure attractions – is a key constraint on market growth and a barrier to investment. Because Saudi families can experience a more relaxed environment in other Islamic destinations, the number of high-value Saudis who choose to spend their leisure time outside the Kingdom is likely to increase unless a more tolerant attitude evolves. A measure of flexibility in social regulation is therefore a key condition for increasing and diversifying the market.

In broad terms, the positioning options would seem to be as follows:

- Either – develop an iconic international destination targeting the high-value leisure visitor, competing directly with Dubai and other world-class destinations in the Gulf, Middle East and around the world that aim specifically for this market.

This would require some fundamental and no doubt unacceptable changes in the social/cultural environment and is a high-risk strategy demanding
a massive level of investment in product development over a long period.

- Or – focus on a core high-volume low-spending domestic family market with limited product expectations, while concentrating product development on attracting new higher-spending niche markets.

This is likely to lead to continuing deterioration of the core tourism product through lack of investment incentives.

- Or – the recommended strategy - target a wider higher-spending Muslim family market, from both domestic and foreign markets, that feels uncomfortable in the completely unrestricted social environment of western-oriented holiday destinations. In parallel, diversify into new high-value special-interest foreign markets such as marine sports, cultural heritage tours and adventure activities.

This would require a more understanding attitude from the authorities in order to overcome the stifling social restrictions that apply in most holiday areas and restrict market growth, together with a high level of product investment, to compete with modern family resorts in Egypt, Malaysia and elsewhere. This option would appear to offer the best opportunity to develop a distinctive position in the tourism marketplace and to create a viable long-term tourist industry.

**Branding**

The Saudi Red Sea Coast needs to be clearly distinguished on the one hand from popular holiday destinations in the Muslim world and on the other from established diving and cultural heritage destinations. This will require the development, over a period of years, of a distinctive Red Sea Coast brand identity, which must reflect the area’s core product strengths and the reality of the visitor experience.

The core product strengths, with associated leisure activities, are seen as:

- Exceptional natural resources:
  - unexplored coral reef and seashore (diving and marine sports)
  - desert landscapes (adventure activities)
  - mountains (health treatments and adventure sports)
- Rich cultural heritage (cultural, archaeological and historical visits)
- Jeddah’s variety of leisure attractions (shopping and entertainment)
- Pleasant climate most of the year (outdoor sports)
- Unique place in the Islamic religion (Umrah Plus packages)

The brand must incorporate all these core strengths, varying the emphasis according to the particular demands of domestic, Muslim and foreign markets.

In the domestic market, where the Red Sea name does not immediately conjure images of a holiday destination, the need is to create a new brand identity with the emphasis on the growing diversity and quality of family leisure opportunities all along the coastline. In international niche markets, where the Red Sea is strongly associated with the “Egyptian Riviera”, the need is to change existing perceptions with the focus on the quality of the previously inaccessible marine sports and cultural activities.

The values that are promoted must be carefully maintained and protected and be clearly evident to the visitor. If the brand message makes claims to a “family-friendly”, “value-for-money”, or “world-class” experience, it is essential that the visitor goes away feeling that these promises have been fulfilled. If visitors are disappointed and feel misled, the brand will quickly start to lose credibility.

Sensitive issues that will influence visitors’ decision making cannot be ignored, specifically security, and local religious and cultural traditions as they affect Muslim and non-Muslim visitors, women and families.

The brand identity itself is only a part of a destination branding strategy. Getting full value from a destination branding strategy involves a commitment by all stakeholders to the basic goals, values and means of delivery of the strategy, so that a consistent approach is taken not just to the marketing of the brand but to the associated product development and delivery requirements.

A priority over the course of the short-term 5-year action plan must be to establish a strong and distinctive brand identity for the Red Sea region in key markets. The development of the brand, logo and slogan will require professional assistance.
9. Marketing Strategy

Market Growth Strategy

In view of the time required to implement product improvements, create a brand image and develop a marketing impetus, short-term growth expectations should be conservative.

The target for the initial 5 year period therefore is one of consolidation of existing business and small scale penetration of new international markets.

In the longer term, growth will be based on developing a high volume Muslim family market from a wider range of source markets, significantly expanding the Umrah Plus segment and diversifying into high-value international markets.

The shortage of good quality accommodation capacity in the main holiday resorts limits the opportunities for growth during peak holiday periods. With no immediate plans for a significant increase in capacity, short-term strategy needs to focus on finding new sources of business for the shoulder and low seasons.

The ability to travel outside the peak holiday seasons belongs primarily to older/non-family markets, and travellers motivated by a special interest. The Red Sea region’s core product strengths – the coral reef, cultural heritage, climate and natural attractions - are well suited to a niche market strategy targeting high-value foreign markets. These special interest activities also have a relatively low cultural impact on local communities.

The following niche markets offer good growth potential:

- Diving
- Cruises (Jeddah and possibly Duba/Madain Saleh)
- Cultural heritage tours
- Sailing
- Sea fishing
- Archaeology/conservation

Research conducted for this study among operators of diving and cruise holidays reveals strong interest in this new destination, although concerns need to be resolved in relation to security issues and the situation regarding women visitors. These high-value markets are easy to reach, and have the potential to grow rapidly.

Opportunities are also being created by the spectacular tourism product developments in the Gulf, now one of the world’s fastest growing holiday destinations, which is attracting substantial new markets: for neighbouring destinations in the region, there is the opportunity to offer two-centre holidays.

In the longer term, as new tourism areas and attractions are developed, opportunities will follow to market the region more aggressively to volume markets.

Product Grouping

Not surprisingly in an area as extensive as the Red Sea Coastal region, the range of tourism products is wide but fragmented. To focus the marketing effort more cost-effectively, it is helpful to group the core products into themes, along the following lines:

Product Development Priorities

To achieve the goal of a world-class destination and attract a greater diversity and volume of visitors implies substantial upgrading and reshaping of the tourism product, under the guiding principles of quality, sustainability and achievability. Development needs to take account of the product in competitor destinations (notably the GCC) and must be market driven and in line with the branding and market growth strategies.

The region’s outstanding natural resource, the magnificent coral reef with its warm sea, extensive seashore...
and attractive climate, offers a tourism potential that so far has been little exploited. The unique cultural attractions, the Old Town of Jeddah, and the Nabatean tombs at Madain Saleh, also have unexplored potential, and can contribute significantly to the ‘personality’ of the brand image and help spread the benefits of tourism to new communities.

To achieve the rapid development required, a more flexible enabling environment will be needed to encourage greater investment, together with better regulation to uphold standards and protect against anti-competitive practices.

The following basic product improvements/developments and regulatory amendments are needed to enable growth in identified key target markets:

- **Accommodation**
  - Upgrading of accommodation for middle and low-income family groups through stricter regulation and inspection
  - Additional capacity in key holiday areas through incentives for high-quality new developments and resorts

- **Attractions**
  - Upgrading of family leisure attractions to world-class standards
  - Development of iconic new attractions to generate wide publicity

- **Entertainment**
  - Better evening entertainment options needed in towns and resorts
  - More high-quality popular and cultural events throughout the year

- **Sports facilities**
  - Development of more high-quality public beaches and resorts
  - Development of a motor car racing circuit

### Special interest activities

- **Diving**
  - provision of more live-aboard boats
  - incentives to build new top quality diving compounds
  - better regulation, giving protection from unfair competition to investors
  - more flexible supervision by coastguard

- **Marine sports**
  - relaxation of regulations to allow offshore sailing in selected areas, and sea-fishing trips

- **Cultural heritage**
  - visitor management plan for Jeddah Old Town
  - packaged/themed tours to major cultural and heritage sites (Jeddah Old Town, Madain Saleh, etc)
  - identification and packaging of archaeology/conservation sites for visitors

- **Ecotourism**
  - Guided adventure tours to the desert and mountains
  - Wildlife/birdwatching tours

### Key Source Markets

#### Market By Market Action Plans

The short and long-term action plans have the aim of delivering a diversified market composed of volume, high-value and growth segments, attracted by a rapidly evolving tourism product.

The characteristics, growth targets and delivery strategy for each market segment are outlined below.

Marketing activity will employ the following tools, and should be conducted wherever possible with the

---

### Table 9.2 Market Priorities

<table>
<thead>
<tr>
<th>Short term (years 1-5)</th>
<th>Volume markets</th>
<th>High-value markets</th>
<th>Growth markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic: families VFR Youth Day trips/short breaks Special interest: sports/culture Health treatment</td>
<td>Expats, Gulf/ME MICE Extension</td>
<td>Special-interest (mainly Europe): Diving Cruise Sports (events, training) Cultural heritage/conservation Sea fish</td>
<td>Special-interest (US, Japan, Far East, Australasia)</td>
</tr>
</tbody>
</table>

| Long term (years 6-20) | As above Umrah Plus | Expats, Gulf/ME, MICE Extension Special-interest | Umrah Plus |
support of industry partners, both to increase the level of resources available and to secure the commitment of the trade.

_Marketing tools_
Resources need to be provided to allow the use of the following tools:
- Web site in key languages (initially Arabic and English), and associated electronic distribution tools, email, text messaging etc
- Public relations
- Advertising (consumer and trade)
- Point-of-sale promotions
- Trade partnerships/joint marketing initiatives
- Travel trade and press familiarisation visits
- Collateral materials in Arabic and English covering the key product groups (brochures, posters, photos)

_Short Term 5-year Plan_

**Key objectives**
- To position the Red Sea as a desirable destination in key target markets
- To establish a distinctive Red Sea brand identity based on the core product strengths
- To consolidate core volume markets
- To broaden the market base by attracting new high-value markets
- To disperse visitor traffic to new communities along the coastal region
- To fill unused capacity outside the peak season
- To raise the value of tourism to the region

**Strategy**
- Raise awareness of the diversity of the region’s tourist product range through printed materials, public and trade relations campaigns based on the five core product groups.
- Use public relations to create a fashionable profile for the new Red Sea region
- Develop marketing partnerships with leading carriers, hoteliers, attractions operators and service providers.
- To consolidate the core domestic market, target price promotions at families to boost short breaks and encourage extended length-of-stay.
- Target the Umrah Plus market with special tailor-made promotional packages for the shoulder season
- Promote the summer climate attractions of the mountains to GCC markets
- To increase revenue and improve seasonality, target niche international markets (diving, marine sports, cruises etc) once the product can reliably be delivered.

_Core Volume Markets_

**Family**

_Market size and characteristics_
In 2002, 55% of domestic visitors to Jeddah (3.2M visitors), the dominant attraction on the Red Sea coast, came for holiday/leisure purposes, most of them in family groups with an average size of 5 persons.

Domestic holiday visitors are young, reflecting the demographic profile of the population: 70-80% of visitors to Jeddah are aged 15-30 years old. The majority come from socio-economic categories with limited spending power: 74% of domestic visitors to Jeddah are from SEC C1/C2.

Holiday visits are strongly concentrated on public, religious and school holiday periods. Nearly 40% are in the months of February, July, August and September. The average length of stay is less than 7 nights.

(Resources used)
The most popular accommodation for family/leisure visitors is furnished apartments, used by 40% of visitors.

The lack of spending power of the core family market is reflected in the attractions rated most highly in visitor surveys: in Jeddah, free amenities such as the Corniche and water fountain are most popular, followed by inexpensive amusement parks.

A MAS survey into visitors’ spending in 2002 reveals very low average expenditure per person, of just SR893 per trip. Expenditure breaks down as follows: Accommodation 22%, Food 20%, Transport 13%, Shopping/Leisure Attractions 29%, Recreation/Culture/Sport 12%, Other 4%.

_Constraints_
The family market is squeezed into a high-price straightjacket by the obligation to take its holidays in the school and public holiday periods. Some flexibility in school holiday timings among different provinces would help to reduce seasonality, bring down prices and grow the domestic market. Anecdotal evidence
suggests dissatisfaction with the tight social regulations that restrict movement for families and women has a direct effect on tourism demand.

**Market situation**
The product is not competitive either in product quality or on price with rival destinations in the Gulf, Middle East and Malaysia, which are increasingly drawing away the wealthier segment of the family market, leaving short-stay low-spending visitors as the core volume market.

**Marketing Objectives**
- Consolidate existing visitor volumes.
- Recover high-value segments of the family market.
- Extend the length of stay.
- Increase the average level of expenditure.
- Increase the number of short breaks.
- Spread visitor traffic to new tourist areas as they are developed.

**Targeted Marketing Actions**
- Organise special family price-led promotions, involving a wide range of accommodation providers, attractions and service providers, advertised nationally using the press, TV and PR.
- Stimulate growth of the outdoor activities and marine sports market, through public relations (celebrity endorsements), public demonstrations, free teaching sessions and special events for children and young people.
- Develop awareness of underused cultural heritage and natural attractions, through family-friendly packaged tours, open days, free visits and special events.

**VFR (Visiting Friends or Relations)**

**Market Situation**
The VFR segment accounts for 26% of visitors nationwide, and 20% of Jeddah’s visitors. Although VFR visitors have a greater average length-of-stay than other segments of the visitor market, their level of spending tends to be lower because of access to free or inexpensive accommodation and less frequent use of restaurants and tourist attractions.

**Marketing Objectives**
- Increase use of leisure amenities and cultural heritage attractions.
- Encourage more frequent repeat visits.
- Foster a sense of regional pride and persuade VFRs to act as ambassadors for the region.

**Targeted Marketing Actions**
- Foster the organisation of regular leisure, sports and cultural events outside the main holiday seasons to stimulate off-season travel.
- Co-ordinate price-led special promotions, with attractions, entertainment and restaurant operators during the off-season aimed at VFR visitors and residents.
- Promote a dedicated events diary on the web site to create awareness of leisure and cultural activity opportunities throughout the region.
- Advertise tourism events, activities and new developments in the local media.

**Day Trips/Short Breaks**

**Market situation**
Day visitors by the local population are a vital element of the tourism economy. In 2002 for instance, Jeddah is estimated to have attracted 1.9M day visitors for leisure purposes.

However, in relation to the populations of the two cities within two hours’ drive of Jeddah (Makkah 1M, Taif 750,000+), the volume of day trips suggests significant potential for growth. The local market is the prime target for off-peak promotions.

More detailed research is needed into visit patterns, motivations, constraints and satisfaction levels.

**Marketing Objectives**
- Grow the market by 10% a year.
- Increase short breaks during off-peak season.
- Spread traffic to newly developing tourist areas.

**Targeted Marketing Actions**
- Develop a bigger range of weekend events, festivals and activities, especially in March-June and Sept-Nov. Promote through advertising and PR in local media.
- Target individual segments within the day trip market: women/shoppers, educational groups, children, and special interest groups.
- Create better awareness of growing range of cultural, sports and adventure resources through discovery days, free demonstrations and guided tours, using advertising, PR and direct marketing.
Growth Markets

MICE Extension

Business visitors are the biggest value segment of the visitor market for Jeddah and the main towns in the region, and must be regularly targeted with attractive incentives to extend their visit (and maybe bring their families).

Market size
In 2002, research estimates that 1.07M business-related visits, 10% of all visitor traffic, were made to Jeddah. The market is largely domestic.

Marketing Objectives
- Increase spending and average length-of-stay.
- Fill unused capacity in higher grade hotels at weekends.
- Promote domestic uptake of special-interest activities.

Targeted Marketing Actions
- Produce special weekend extension packages with trade partners (hotels, airlines, attractions) and promote by advertising, at airports and hotels etc.
- Promote introductory/discovery experiences to create awareness of sports and adventure activities.
- Work with conference, exhibition and event organisers to offer special pre- or post-event extension packages to delegates and their families

Umrah Plus

Market characteristics
Jeddah is the traditional point of arrival for most pilgrims, especially from foreign markets. Pilgrims on an Umrah package can extend their visit once they have performed Umrah in Makkah.

In 2002, 15.7M visitors arrived in Makkah Province for hajj or umrah purposes, of whom 5.25M came from international markets.

Pilgrims are significantly older than the average visitor, 70% of visitors to Makkah being aged 30–60. They have a shorter length of stay than the leisure visitor, owing to financial constraints and the purpose of the visit. Umrah Plus pilgrims by definition represent the wealthier segments of the Muslim faith.

Market potential
Whereas Hajj always takes place in the last month of the Islamic calendar, Umrah can be performed during nine months of the year and as often as wished. Umrah visits in fact tend to be concentrated on a few months, principally November, December and February, and July/August.

Anecdotal evidence suggests that Umrah visitors from long-haul markets (Malaysia, Indonesia etc.) combine their pilgrimage visits to GCC and Middle East destinations, which actively promote to Muslim markets. The proportion of Umrah traffic that stays in Jeddah is small, and suggests a good potential for growth through targeted marketing.

Marketing Objectives
- Fill capacity in low-occupancy periods.
- Increase level of spending in the region.
- Spread the benefits of tourism to new tourist areas.

Targeted Marketing Actions
- Work with authorised umrah handling agents and Saudi Airlines to develop a range of umrah extension packages based on the core product groups.
- Develop special shoulder-season (April, May, June, Oct) promotional offers with trade partners.
- Aggressively market Umrah extension packages through sales visits, workshops, and trade and PR campaigns in selected target markets.
- Produce supporting promotional print, and distribute to the trade and public.

Special-interest Niche Markets

Diving

Market assessment
- The Saudi Arabian Red Sea, at present inaccessible to most international visitors, is considered to be the leading unexploited diving resource in the world. Its coral reef stretches the length of the coast from the Jordan to the Yemen borders, the most notable and practicable diving sites being at Jeddah, the Farasan Banks, Yanbu and the Farasan Islands.
- There are estimated to be around 10,000 qualified divers in Saudi Arabia, mostly expatriates, but including a growing number of Saudis. However, of these only some 2500 are thought to practise
their sport regularly in Saudi (on the Red Sea or Persian Gulf), most others being assumed to use the better facilities in Egypt, Israel, Jordan and Gulf States.

- Existing capacity is limited, and could not cope with a rapid increase in numbers. However, adding extra capacity is relatively easy and would not be a major constraint.

- Obvious constraints are the lack of easy access to open water, and the generally unsympathetic attitude of the coastguard, particularly around Jeddah. Foreign and expat women in diving groups are sometimes prevented from diving. The importation and registering of foreign-built specialist dive boats is hampered by bureaucracy. (An SCT-led committee has been set up to discuss these issues).

- Jeddah has a small number of diving operators and retail shops. The biggest of them is Al-Ahlam/Dream Divers who have a shop in the town centre and a big marina on Obhur Creek with a dozen or more modern, mostly American-built, dive boats. There are 4 or 5 other smaller operators, but the operators do not combine forces to discuss common interests or try to grow the market.

- Diving is concentrated around Jeddah/Obhur Creek, where several hotels and private beaches provide access directly to the reef. Sites at Farasan Banks, the Farasan Islands, and Yanbu are undeveloped as yet, and can only be accessed by taking live-aboard boats from Jeddah.

- Around the world, there are some 12 million qualified divers (6 million holding the most popular PADI certificate). It is an easy market to reach through specialist web sites, magazines, operators etc, with high levels of disposable income and excellent potential for return visits. Awareness of the attractions of the Saudi Red Sea is already quite widespread, so opening the market would be inexpensive and highly cost-effective.

- Although occasional groups of foreign divers visit Jeddah (esp from Italy), access is limited by visa regulations and bureaucracy, and by the monopoly held on international visas by Saudi Airlines, who tend to charge higher fares than rival airlines. International holiday visitors also have to travel in groups of 10 persons minimum, which limits full growth of the market.

- Diving is an expensive activity, and divers therefore fall into the prized high-spend/short stay category. By the nature of their activity, they have relatively limited impact on local culture.

- A conservative estimate of the average expenditure of the diving visitor at the destination, at current costs, (covering diving fees, 4* hotel, meals, shopping and local transport, but not air fares) would be SR 6000-7500 per week: very high in comparison with average tourism expenditure, and competitive in comparison with rival destinations.

- The Red Sea has the benefit of a diving season that runs almost throughout the year, offering the opportunity of valuable business at off-peak periods.

**Product development needs**

- Increase capacity in line with projected market growth, with appropriate development guidelines and incentives (to avoid devaluing the product, as in Egypt): new live-aboard boats, and dedicated diving resorts for foreign visitors.

- Produce a coastal development plan to identify suitable development sites for new beach resorts/dives sites.

- Allow the construction of semi-permanent pontoons moored on the outer reef, to provide services including oxygen supplies, first aid, food and drink etc (as on the Great Barrier Reef in Australia). These should be moved from zone to zone every few years to minimise the risk of marine pollution and to protect marine life.

**Regulatory issues**

- Remove or lower the biggest barriers to growth, by resolving key regulatory, security and bureaucratic difficulties.

- Agree more flexible and practical procedures with the coastguard, especially in relation to access to the outer reef.

- Recognise internationally established diving licences (such as PADI), without requiring an additional local licence.

- Agree a policy on foreign/expat women divers.

- Put responsibility for diving and marine sports supervision under the aegis of a new single authority, with representation of the coastguard and other interested parties.

**Marketing objectives**

- Open new high-value international markets: initially targeting GCC/Middle East expats and selected western European markets until capacity has grown.

- Grow the international market from less than 500 per year to 3000-5000 per year within 5 years, providing estimated local expenditure of up to SR 30 million per year.

- Broaden the market, by attracting more local participants, through awareness/initiation classes
for youth and school groups, conducted by the operators.

- Help fill unused accommodation capacity in off-peak periods.

**Marketing**

- Set up a diving and marine-sports marketing association, bringing together operators, handling agents, resorts, hotels etc, to agree and implement jointly-funded promotional activity in target markets.
- Develop a web site in English, with graphic images of the product, up-to-date product information and links to operators.
- Distribute promotional print in English and Arabic versions in key markets.
- Organise familiarisation visits for diving operators and journalists from target markets.
- Distribute regular press stories to the diving media.

**Marine Sports**

**Market assessment**

The Red Sea coastline and reef are an under-used resource which offers outstanding opportunities for watersports activities of all kinds.

The warm, safe and fish-abundant waters and pleasant climate are ideal for swimming, diving (see above), sailing and fishing, for most months of the year. However for reasons chiefly of security and cultural sensitivities, relatively little water-based leisure activity takes place, and the beach and watersports amenities are very under-developed.

Before marine sports can be actively marketed as a product, serious constraints have to be addressed to allow freer access to the sea and to enable investment in equipment and facilities to take place.

**Market potential**

Marine sports appeal to high-value markets, from expat, international and domestic sources. They have an important part to play in alleviating seasonality problems by filling unused capacity during low-occupancy periods.

Sailing and fishing are specialist activities with worldwide markets, where the market is easy to reach through established networks (tour operators, clubs, specialist media). Europe, the Middle East, Japan and North America all offer good potential.

Most sailing and fishing visitors would buy inclusive packages and stay in high-grade hotels close to the sea: they need have little disruptive impact on local culture.

The demonstration effect - of seeing foreign holidaymakers enjoying different types of leisure activity - would gradually encourage local residents and domestic visitors to participate and drive investment into new amenities.

** Constraints **

Obtaining permission to take a boat outside inshore waters is difficult. As a result boating activity is mostly limited to inshore motor boating and jet-skiing, and sailing is rare. Around Jeddah access to the sea is severely restricted.

The number of well-maintained beaches accessible to the general public is very limited in relation to the population and length of the coast; large stretches of seashore around Jeddah are private or closed to the public. From lack of opportunity, for cultural reasons (particularly affecting women) and because swimming is not widely taught in schools, swimming is not as widely practised among Saudis as in other countries with such a valuable natural resource.

**Marketing Objectives**

- Attract new high-value markets.
- Alleviate seasonality problems, fill unused capacity.
- Broaden the range and quality of the leisure product.

**Targeted Marketing Actions**

- Create partnerships with specialist operators of marine sports holidays and agree annual joint marketing programme in selected markets.
- Use journalists’ visits to generate coverage of the fishing, boating and sailing opportunities in specialist media.
- Invite specialist tour operators in key markets to sample the product.
- Print and distribute specialist publicity material in English and Arabic.
- Foster the organisation of special events – fishing and sailing competitions etc.

**Cultural Heritage & Cruise**

**Market assessment**

The high-spend, short-stay visitor, who has limited impact on local customs, culture and environment is
the most highly sought-after segment of the tourism market.

The core product strengths of the Red Sea region and its previous inaccessibility to foreign visitors give it a strong appeal and can most practically be exploited through cultural heritage and cruise markets.

The issues of security and the movement of women need to be resolved to the satisfaction of tour operators before they will take the risk of promoting the destination.

Provided these potential constraints are addressed, the market has the potential to grow rapidly to several thousand a year within five years.

**The cultural heritage product**

Jeddah Old Town, and the Nabatean tombs at Madain Saleh are iconic cultural attractions which can be the basis of heritage tours for cruise groups and groups with a specialist heritage interest. Conservation, restoration and interpretation of these and other heritage/archaeological sites is vital if this potentially valuable market is to develop. Other sites (archaeological, religious), activities and experiences (soft culture, handicrafts) can help to create a range of interesting packages.

**The cruise market**

Jeddah and possibly Duba are the only ports on the Red Sea with the facilities to receive cruise ships that pass through the Suez Canal. Jeddah’s established tourism resources make it an attractive port of call for cruise operators. Duba could offer access to Madain Saleh and the remains of the Hijaz railway.

Telephone research among European cruise operators indicates strong potential interest in the destination, particularly among operators of smaller cruise ships (70-200 passengers) catering for an older market with cultural interests. The UK, Germany, Scandinavia and Italy have over 50 operators and are good initial source markets.

**Marketing Objectives**

- Alleviate seasonality problems, fill unused off-peak capacity, increase revenue.
- Exploit the demonstration effect: show local residents and domestic visitors the value and interest in historic and cultural sites and products.

**Targeted Marketing Actions**

- Work with specialist handling agents to define a range of products for cultural heritage and cruise groups.
- Invite cruise and cultural heritage tour operators in selected markets to visit the destination.
- Provide media coverage support through hosted press visits.
- As the product develops, expand sales activity to new markets, participating in the established cruise trade shows and workshops and major travel trade events.

**Long Term Objectives - Years 6-20**

Improvements in the first 5 year period to the tourism product and infrastructure will allow gradual expansion of marketing activity in line with capacity growth. A distinctive brand image will change perceptions and develop domestic awareness of the region’s diverse attractions. New niche markets will spread visitor traffic to new tourist areas and bring valuable off-peak business.

Market growth will begin to accelerate, particularly in special interest markets, bringing increased revenues and encouraging the development of new tourist areas.

The marketing objectives for the long term will be:

- To raise the value of tourism to the regional economy by recapturing lost high-value domestic markets as the family product improves.
- To raise the overall quality of the tourism experience by focusing on core product strengths based on quality and sustainability.
- To position the Red Sea Coast as a desirable cultural and special-interest destination among high-value niche markets.
- To continue to reduce seasonality and increase revenues by expanding into new special-interest high-value markets.
- To continue to diversify the market base by opening new growth markets.
- To develop greater participation by local residents and domestic visitors in a greater range of leisure, cultural and sports activities.

The fulfillment of these objectives will be achieved by close partnership between the authority responsible for delivering the strategy and trade operators in all primary markets.
<table>
<thead>
<tr>
<th>Products</th>
<th>Market segments</th>
<th>Leisure attractions</th>
<th>Beach/seaside</th>
<th>Shopping/city life</th>
<th>Culture, heritage</th>
<th>Cultural events</th>
<th>Motor sports</th>
<th>Sports events</th>
<th>Marine sports (sailing, jetskiing etc)</th>
<th>Diving</th>
<th>Sea fishing</th>
<th>Nature/adventure travel</th>
<th>Health/spa treatment</th>
<th>Mountain environment</th>
<th>Climate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Family leisure</td>
<td>VFR</td>
<td>MICE</td>
<td>Youth</td>
<td>Umrah Plus</td>
<td>Short breaks/day trips</td>
<td>Sports, activity</td>
<td>Health &amp; fitness</td>
<td>Expats</td>
<td>Gulf / ME leisure visitors</td>
<td>Internl cruise</td>
<td>Internl diving</td>
<td>Internl special interest</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leisure attractions</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>A</td>
<td>B</td>
<td>A</td>
<td>C</td>
<td>A</td>
<td>C</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>A</td>
<td>A</td>
<td>C</td>
</tr>
<tr>
<td>Beach/seaside</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>A</td>
<td>B</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>A</td>
<td>B</td>
<td>B</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>Shopping/city life</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>C</td>
<td>B</td>
<td>A</td>
<td>C</td>
<td>C</td>
<td>B</td>
<td>B</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>Culture, heritage</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>B</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>C</td>
<td>A</td>
<td>A</td>
<td>C</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Cultural events</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>A</td>
<td>P</td>
<td>B</td>
<td>P</td>
<td>A</td>
<td>P</td>
<td>B</td>
<td>P</td>
<td>B</td>
<td>P</td>
<td>B</td>
</tr>
<tr>
<td>Sports events</td>
<td>C</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Marine sports (sailing, jetskiing etc)</td>
<td>P</td>
<td>P</td>
<td>P</td>
<td>P</td>
<td>A</td>
<td>A</td>
<td>P</td>
<td>B</td>
<td>P</td>
<td>B</td>
<td>B</td>
<td>P</td>
<td>B</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td>Diving</td>
<td>P</td>
<td>P</td>
<td>P</td>
<td>P</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Sea fishing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>P</td>
<td>A</td>
<td>P</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Nature/adventure travel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Health/spa treatment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>P</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Mountain environment</td>
<td>A</td>
<td>B</td>
<td>A</td>
<td>A</td>
<td>B</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>B</td>
<td>B</td>
<td>B</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td>Climate</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>A</td>
<td>C</td>
<td>A</td>
<td>B</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>B</td>
<td>B</td>
<td>B</td>
<td>B</td>
<td>B</td>
</tr>
</tbody>
</table>

A Primary importance: main reason(s) for the visit.
B Secondary importance: helps to influence decision to visit, in combination with other motivations.
C Tertiary importance: may add to enjoyment, but does not significantly influence the decision to visit.
P Potential Growth market.

Table 9.3 Product/Market Fit
Product Concepts

10.1 Introduction

The aim of this strategy is not only to provide guidance on the scale and location of tourism-related development, but also inspire potential investors and developers with regards the possible style and quality of any scheme.

Product concepts are set out in this chapter for the following facilities:

- Resort hotels i.e. leisure orientated, beach front accommodation with a variety of recreational and sporting facilities;
- Dive centres i.e. facilities that are destinations for dive holidays because of the quality of their services and the accompanying accommodation;
- Major attractions i.e. such as a large aquarium which could serve as an educational and environmental awareness facility as well as contribute to the tourist appeal of the area;
- Eco-Tourism i.e. where tourists can have the opportunity to visit and stay with local communities and learn about their specific traditions and environment;
- Heritage Tourism i.e. where there are opportunities to transform otherwise redundant heritage sites into a modern tourist facility;
- Nature Tourism i.e. to show how well managed tourism facilities can contribute to the protection and promotion of the interests of protected areas.

In addition there are proposals for three of the Red Sea's greatest cultural tourism destinations, namely Mada'in Saleh, old Jeddah and a selection of coastal towns.

10.2 Resort Hotels

10.2.1 Introduction

There is a clearly identifiable category of international standard resort hotels that have spread rapidly around the Middle East in recent years that have raised regional standards to those that can be found in prime tourism destinations around the Mediterranean or the Far East. Some are recognisable and established international brands such as Hilton and Movenpick. Some are locally developed brands that are rapidly acquiring an international following, such as Jumeirah. Others are locally managed and independently marketed.

For the purpose of this strategy it is important to set out the key guidelines that should influence any future development of the sector along the Red Sea.

10.2.2 Strategic Role

If the vision for the Red Sea as set out earlier in this strategy is to be achieved then it is important that the Kingdom attracts resort hotels of a modern, international standard, whether through local or international investment, development and operation.

It is important for the wider strategy because:

- it would establish the profile of the area as a leisure destination within its key market, namely the domestic, Saudi family market, who may well have experienced such developments elsewhere in the region;
- such markets also need to be convinced that a Saudi resort can provide the same quality of service and value for money, and this would be achieved by establishing the confidence of a recognised brand; and
- they would provide a focus for support services to be developed around the resort, such as dive centres, guided tours, restaurants etc, which give opportunities for local investors and operators.

10.2.3 Potential Locations

Investors in such properties will be seeking locations that meet the following criteria:

- Easily accessible by air, to international markets or large domestic markets;
- Attractive coastal sites;
- Good local access and supporting infrastructure and utilities;
- Additional tourist attractions/services available e.g. retail, heritage, events.
Section 8 identified the potential locations for such development as being:

- Sharm Yanbu
- Thuwal, north of Jeddah
- Obhur Creek and north Jeddah
- The Northern Corniche, Jeddah

and in the longer term:

- Qiyal/Sharma, Tabuk

and on a smaller scale:

- Farasan Islands

10.2.4 Design Guidelines

Since few Saudi developers or operators have experience of facilities of this nature and because the market for such facilities is likely to be the Saudi domestic market until access to the international tourism market is available, there needs to be guidance on the standards of design that are expected, and will increasingly be expected by the key market segments. These are principally based around the Saudi family’s desire for privacy.

Appendix x contains design guidance on possible layouts, public areas, public buildings, landscape, villas and interiors for such establishments.

10.2.5 Feasibility

Size and Quality

Top quality (4 or 5 Star) international standard resort hotels will usually vary between 100 and 400 rooms. This level of quality is required by the rising expectations of the key target markets (the Saudi family and couples) but the size of the property will vary according to the location, with sites in existing resorts having higher land values and therefore requiring a more intensive scale of development.

Cost

The average construction cost of an international standard 4/5 Star hotel is about 400,000 SR per room, and taking the ‘rule of thumb’ of international hotel operations this would lead to a room rate of 400 SR per night. It is also assumed that the commercial target should be a room occupancy of 60-65% per year.

Job Creation

This standard of accommodation should generate 2 Full Time jobs per room.

---

**Fig 10.1 Potential Sites for Resort Development in Greater Jeddah area**
Hotels and Dive Centre in operation
Major resorts proposed
High conservation value

Scope for Business Hotels
and Heritage Hotel

Sporadic hotel development
Danger of overdevelopment of reef top

Fig 10.2 Potential Sites for Resort Development in Yanbu
10. Product Concepts

10.3 Development of a Scuba Diving Centre

10.3.1 Introduction

The Red Sea is regarded as one of the finest places in the world for Scuba Diving. Egypt has developed tourist destinations such as Hurghada and Sharm El Sheikh on the basis that the northern region of the Red Sea is the ‘centre of excellence’ for scuba diving. This is certainly not the case as there are areas along the west coast of Saudi Arabia that are untouched, virgin, pristine scuba diving sites.

10.3.2 Strategic Role

There are established Scuba Diving operators across the Kingdom of Saudi Arabia and several have started to venture away from diving close to the main population areas of Jeddah and Yanbu on the west coast and Dharaan on the east coast, with one operator running scuba diving ‘live aboard’ boats with clients from Italy and Germany.

Most hotels have beach and/or diving facilities. The dive shops in Jeddah have good reputations. There is therefore an opportunity to develop an exclusive stand alone scuba diving resort in Saudi Arabia that will attract domestic and international divers.

It is recommended that the scuba diving resort is built to a high specification, with excellent accommodation, Arabic themed, ‘state of the art’ diving facilities and equipment and additional features and activities to entertain non-divers and children.

10.3.3 Potential Locations

It is recommended that Farasan Islands, near Jisan, are the location for a new Scuba Diving Resort.
service and it is recommended that the Scuba Diving Resort operates their own boat taxi service with a better quality of boat. It is also proposed that a new airship be constructed for the operation of air services by small-medium sized aircraft.

There is a wildlife preserve on the main island.

There is a non-traditional hotel on the island, Farasan Hotel located in Farasan Town, that provides a friendly service, clean rooms, food and offers diving, Farasan tours, fishing and boat trips. A second hotel opened in 2005. This hotel is located on the beach, but has limited facilities and does not have a pool or any leisure facilities. It is aimed at the local market as a holiday retreat.

Scuba Diving Resort
It is recommended that the resort is built and furnished to the highest standards with an Arabic theme. The resort needs a minimum of 20 rooms that can cater for around 60 persons. The resort should not be too large as this would affect the ambiance and experience for the visitors.

The resort requires scuba diving facilities as follows: scuba diving boats, safety crafts, tank filling equipment, diving pool, scuba diving equipment for rental, dive shop, class room and briefing room.

Complimentary at the resort should include swimming pool and children’s pool, tennis, volleyball, mountain bikes, single and double sea kayaks, pool, table tennis, water skiing and glass bottom boat.

It is recommended that the resort offers spa facilities and treatments.

Farasán Islands - rocky coastline

It is recommended that for a Dive Resort of this size three dive boats are available and up to 20 dive sites are identified, named and marked. This will enable a programme of dives to be established and ensure that the dive sites are not busy. Plotting the dive sites will also enable the dive resort to inform the Coastguard of the dive site locations. A daily schedule of diving can be submitted to the Farasan Coastguard to enable the dives to take place without interference from the Coastguard.

10.3.4 Management Guidelines

It is recommended that the resort is managed by a five star hotel chain. The resort can be included into their resort portfolio. Jeddah has numerous hotel chains that are operating such as Hilton, Inter.Continental, Raddisson SAS, Marriott and Sheraton. Standards of operation must be of 5 star quality in all areas of the resort.

It is recommended that the Scuba Diving facility of the resort is accredited as a PADI Centre (Professional Association of Diving Instructors) and performance managed by PADI’s ‘Quality Management’ process. The focus of PADI’s Quality Assurance Department is to ensure that the resort offers quality dive programmes and services and adherence to PADI Standards. This is accomplished through a unique Quality Management process. PADI’s approach is to be proactive and remedial, not punitive. The objective of the ‘quality Management’ process is to educate, guide and counsel the proposed Farasan Dive Resort on the PADI system of diver education.

Farasan Islands - offshore islands

The resort should also be established as a National Geographic Dive Centre.
10. Product Concepts

PADI National Geographic Dive Centers are PADI’s elite dive centers with highest customer standards and product offerings. Divers visiting the Farasan Dive Resort will be able to participate in the exclusive National Geographic Diver program. The National Geographic Diver Programme will add to the quality experience of visitors to the dive resort. Divers will learn to explore with detail and identify important underwater features. The programme aims to increase diving knowledge and practice to maneuver with poise along the reef’s ecosystems to prevent any damage to the coral and underwater environment.

Marketing the Scuba Diving Resort
The target markets for the resort will be scuba divers in Saudi Arabia, the Gulf Countries and potentially International divers.

The resort can be promoted through PADI, travel fairs and events, scuba diving publications and through existing scuba diving operators in Saudi Arabia through commission basis.

The Farasan Dive Resort would not be difficult to sell as it will be a new location for diving which will attract the hardcore dive market who are excited at the prospect of diving at new remote sites and often have the resources to fulfill there ambitions.

10.3.5 Feasibility

Size and Quality

The size of a top quality dive centre should be determined by the quality of the diving experience that can be provided. The capacity of the location should be determined by the capacity of the dive sites and if these are not to be eroded, the capacity of the dive centre itself needs to be restricted. Likewise the offer of a quality diving experience should be reflected in the quality of the accommodation. In this context the 4 or 5 star rating is provided by quality of service and appropriateness of facilities, rather than over-opulence.

Cost

Considering the smaller overall size of such developments and their remoter locations than normal resort hotels an allowance should be made in the benchmark costs for the average construction cost per room and increase it to a minimum of 500,000 SR per room.

Jobs

Given the factors of size, isolation and range of services mentioned above, the job creation will also be higher for such developments and should be around 3 jobs per room.
10.4 Major Attractions

10.4.1 Introduction

The Makkah Provincial Tourism Plan, and subsequent Jeddah Tourism Plan both identified this need for major new attractions to support the role of Jeddah as the nation’s leading resort. This has been reinforced in this plan by a recognition of its role as a leading destination on the Red Sea.

10.4.2 Strategic Role of Aquaria

Since the first public aquarium opened in 1853, at London Zoo, they rapidly became popular attractions in major cities and coastal resorts. However, during the 1970’s urban development agencies in some of America’s older, industrial, port cities were looking for major attractions to bring in high spending visitors to rundown waterfront districts. The National Aquarium in Baltimore, Maryland was part of such an economic development plan and in 1990 it generated an additional $128 million each year for the local economy, helping justify major expansion plans for the aquarium itself in 2005 ($62 million) and 2007 ($112 million).

Baltimore Aquarium

Its success has encouraged other major urban regeneration projects around the States including Boston, Chicago and more recently Atlanta. Other major aquariums have been developed because of their key research and educational role. An example of such an aquarium is the Monterey Bay Aquarium on the Californian coast, which with a similar level of attendance as Baltimore (1.6 million visitors per year) it contributes $250 million to the state economy each year, creating nearly a thousand jobs on site and in the neighbouring communities.

There is widespread evidence of the continuing appeal and educational impact of major aquariums. The latest construction techniques have allowed for major tanks to hold creatures as large as whale sharks and for tunnels through the tanks to allow a close encounter with sharks. There has also been success in growing new coral reefs and playing a key role in reef research and management.

10.4.3 Potential Locations

Evidence shows that not only do aquariums have a clear role in attracting new visitors to a destination (and encouraging existing visitors to stay longer and spend more), but also that they can play a key role in initiating and directing patterns of urban development. In the USA they have been able to lead the regeneration of old waterfront and dock areas and spread the benefits into declining urban centres.

The Jeddah Tourism Plan has identified the need for additional visitor attractions to serve this city’s continuing and developing role as a resort. However, it also recognised that such a development could help serve other objectives in central Jeddah, such as drawing visitors towards Old Jeddah, providing a link between the Middle Corniche and Old Jeddah; and contribute to the development of a new administration/commercial district behind the Middle Corniche and Old Jeddah. (see diagram)

![Diagram of potential location for Aquaria in Jeddah]

Fig. 10.4 Potential location for Aquaria in Jeddah

10.4.4 Design Guidelines

Given its role as a visitor attraction the building should serve as an icon structure, reflecting its role as an aquarium and its potential as a flagship symbol...
10. Product Concepts

for the city. As a new building the design will be led by the needs of its internal facilities, such as the large viewing tank, but its external appearance should be guided by:

• its prominent waterfront position
• the scope to reflect traditional design features found in Old Jeddah
• the scope to present a maritime theme
• the need to provide views and opportunities from as many directions as possible.

10.4.5 Feasibility

Major aquariums are among the most popular type of visitor attraction in the world, often competing with major theme parks in terms of attendance.

However, each aquarium’s attendance level can only reflect the local competition and market catchment. In Jeddah though there is no such direct competition as an aquarium and little competition in the wider visitor attraction sector.

This can be seen as a commercial advantage, but it must also be seen as an indication of the constraints placed on leisure investment by local cultural and religious regulations which prevent visits from mixed parties of men and women, and even family groups, thus leading to the need to split attendance days between the sexes thus reducing viability.

Opportunities for dive training and a close encounter with sea life.

However, feasibility for such a project in Jeddah would be reinforced by:

• the potential demand from the large resident and visitor population
• the scope for additional revenue funding from catering, dive training, functions etc
• the scope for additional capital funding from academic sources for a Marine Research Institute or from educational sources to serve as an environmental awareness facility.
• a pre feasibility study needs to establish the viability and economic impact of a project on the following scale:
  › target of 200,000 visitors per annum (1/3 in school parties)
  › cost of 250 million SR
  › creation of over 200 jobs
10.5 Eco-Tourism

10.5.1 Introduction

The coastal strip of the Red Sea is a sensitive environment in which to introduce tourism, both ecologically and socially. All tourism projects should be required to undertake Environmental Impact Assessments, but the social impacts are often overlooked and it assumed that the introduction of jobs into the area is a sufficient benefit for the local people. However ecotourism projects start from the assumption that the key benefit of tourism is that it can introduce money into the local economy without requiring a complete change of lifestyle.

The key issues that can be recognised in any ecotourism project are that:

- it is locally inspired and led;
- there is a clear recognition of the carrying capacity of the area for tourism;
- the tourists want to experience local life and culture at first hand; and
- the economic benefits return to the local community.

10.5.2 Strategic Role

Ecotourism can play a strategic role in the tourist development of the Red Sea, but not because of the potential scale of the market. True eco-tourism products are unlikely ever to be more than 5% or so of the region's tourism market, however their presence indicates that a sustainable and sensitive approach has been taken with regards tourism development and this enhances the overall reputation of the area. In addition they can provide real holiday experiences, as additions to traditional holidays.

10.5.3 Potential Locations

One of the paradoxes with ecotourism development is that it is difficult to plan for in the traditional way, since by its very nature it should arise from local initiative rather than be imposed by a plan, and although consultation should always be a key part of any planning process, ecotourism ideas and initiatives may arise at any part of the planning process.

However this strategy is able to identify possible general locations that have arisen during the course of the work programme that could be suitable for ecotourism type development because of their landscape character and social structure. These would include:

- Small coastal communities of Tabuk Province, such as Magne and Ros as Shaikh;
- Settlements in the mountains south and west of Tabuk City;
- The Yanbu and Nakhl area northeast of Yanbu;
- Fishing communities from Al Lith to Qunfidah to Shuqayq;
- Mountain communities of Jizan;
- Fishing communities on the Farasan Islands

10.5.4 Design Guidelines

The indication of a true ecotourism project is that its design is so in-keeping with local traditions that it does not stand out as a tourism facility. It will be the same scale, style and material, as existing buildings. That is the only guideline necessary for such developments.

10.5.5 Feasibility

The SCT has recently commissioned work on the feasibility of ecotourism lodges and although these were intended as commercial rather than community initiatives they will provide guidance on the potential costs and income.
Likewise the quality of the accommodation and supporting facilities should reflect both the character of the area and the local architectural and cultural heritage, while meeting the expectations of the modern tourist.

Cost

Reflecting the range of potential facilities the costs are likely to range from 100,000 SR to about 1 million SR. Beyond this scale of investment the development is likely to be a commercial rather than a community development.

Jobs

This scale of investment is likely to create between 2 and 10 jobs in the local community.

10.6 Heritage Tourism

Development of a historic caravanserai into a hotel (Al Muweilah Fort, Tabuk Province)

10.6.1 Introduction

There are numerous examples of old forts and caravanserais being restored and used as hotels, in Turkey and in other Mediterranean countries. Such buildings provide for an alternative tourism experience, where all necessary modern day commodities are installed but the historic atmosphere and character of the place is carefully maintained.

10.6.2 Strategic Role

In India former Rajput Palaces and the merchant houses known as Haveli have become a major market for offering different levels and types of visitor accommodation. While five star luxury is created in the palaces, smaller historic houses or hunting lodges have been converted into medium range accommodation. Initially projects were funded by the Indian Tourism Development Corporation who was also responsible for running the hotels. However, a lucrative market has resulted in most historic properties being converted and operated by private initiatives. Heritage hotels continue to be a growth area in India, parts of the Middle East and Morocco.

10.6.3 Potential Locations

Al Muwailah fort is thought to be the largest in the Kingdom, and is outstanding in its architectural detail. Its close proximity to a beach and potential for resort tourism raises the opportunity to develop the fort as tourism accommodation as a means of ensuring its conservation and creating a hotel that would be unique in the Kingdom.

10.6.4 Design Guidelines

The size of the fort allows for a decently sized specialist hotel. There is space for the central courtyard to be developed as a series of courtyards, with guest bedrooms and/or apartments set around these private courtyards or communal facilities such as cafes and restaurants.

Accommodation

A rough estimation indicates the following capacity within the building

<table>
<thead>
<tr>
<th>Entrance block</th>
<th>Entrance block</th>
<th>Reception</th>
<th>Offices</th>
<th>Restaurant in one wing</th>
<th>Cafés in turrets connected by wall walk along north side</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance courtyard</td>
<td>Restaurant</td>
<td>Communal open spaces and seating areas</td>
<td>Outdoor section of restaurant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle courtyard</td>
<td>Health centre/hammam</td>
<td>Courtyard for guest use only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inner courtyard</td>
<td>Private areas around entrance to apartments</td>
<td>Shaded children’s play area</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Courtyard for guest use only</td>
<td>Turret used for private seating area (majlis)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>West front</td>
<td>Landscape area, swimming pool, cafes and small kiosks, route down to the sea front</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>East side</td>
<td>Car parking, guest entrance to inner and middle courtyard, service entrance for hotel and restaurants</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>North side</td>
<td>Main entrance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional buildings</td>
<td>To house services and some workers quarters*</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 10.1 Heritage Hotel Components
* Services housed in corner rooms and spaces or possibly in an addition complex built to the side of the fort. This does need to remain sensitive to the setting of the fort from the road and approach as well as from the sea shore.

Car park placed at the back of the fort on the road side with access to the inner and middle courtyards.

**Project development**

For such a large scale project to be successfully launched the following preparatory work to be undertaken:

- Carry out full survey of the fort and maintain records
- Prepare a condition report that identifies all the conservation work that needs to be undertaken to consolidate and stabilise the building and the key architectural features that should be protected and preserved
- Commission a design study for development and a feasibility study for developing fort as a hotel
- Engage with private sector operators who may be interested in investing in the venture and running a hotel

It is essential that during the development process:

- Conservation best practice is employed at all times with advice from suitably qualified conservation professionals and work carried out by appropriately skilled craftsmen
- New additions are in keeping with the historic character of the fort and do not detract from its architectural qualities
- The setting of the fort is maintained, possibly by retaining land around it and particularly keeping the view to the sea open
- Some form of public area with some interpretation is provided within the development

**Design considerations**

- Rooms must maintain the character of the historic property
- Choice of furnishings and textiles that reflect local traditions will enhance the visitor experience
- Courtyards must maintain character and proportion of original; landscaping should be sensitive. The use of traditional tents and awnings to provide shade will be more appropriate.

The success of the project will depend on the area developing as a resort area and commitment from an investor to undertake a project of this type.

**10.6.5 Feasibility**

Until a full survey of the building is carried out it will not be possible to determine the cost of repairs and restoration that will be required. For a private sector developer this constitutes considerable risk. Since this would be the first heritage hotel in the Kingdom joint financing from the public sector may be essential to attract private sector developers.

Early heritage hotel schemes in Turkey were supported by the Tourism Bank or directly funded by the Turkish Touring and Automobile Association acting on a not-for-profit basis.

**Precedents**

<table>
<thead>
<tr>
<th>Hotel</th>
<th>Location</th>
<th>History</th>
<th>Category</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club Caravanserai</td>
<td>Kusadasi, Turkey</td>
<td>13th C. caravanserai</td>
<td>2 stars</td>
<td>26 rooms (50 beds) popular courtyard restaurant</td>
</tr>
<tr>
<td>Grand Caravanserai</td>
<td>Diyarbakir, Turkey</td>
<td>16th C. caravanserai used by traders and pilgrims on their way to the Hijaz</td>
<td>4 stars</td>
<td>15 suites, 29 double rooms (100 beds in total), 3 restaurants, swimming pool, Turkish Bath etc.</td>
</tr>
<tr>
<td>Taybet Zaman Resort Hotel</td>
<td>Petra, Jordan</td>
<td>Typical Jordanian village converted for use as a hotel</td>
<td>5 stars (Sofitel)</td>
<td>130 guest houses</td>
</tr>
<tr>
<td>Historic houses</td>
<td>Fez Medrassa, Morocco</td>
<td>Restored courtyard houses (riads) in the Medina rented out to visitors</td>
<td>Houses sleep 2-10, are fully serviced with maids and cooks</td>
<td></td>
</tr>
</tbody>
</table>

*Table 10.2 Heritage Hotel Role Models*
10. Product Concepts

Table 8.3

Potential for utilising typical Al Balad buildings

Retain building form and design character for hotel. Use courtyard as central communal area and incorporate traditional design features

Distinctive local design features to contribute towards the hotel's character and to enhance atmosphere and sense of place for visitors
10.7 Nature Tourism

10.7.1 Introduction

The interests of nature conservation are under threat on a variety of fronts, mostly connected to the pace of modern development and the demands of increasing residential and industrial growth and the insatiable demand for land and resources. This is true of Saudi Arabia as of any other urbanised and industrialised country. However in the KSA as described in Section 4, the protective legislation for the natural environment is poorly resourced and enforced and the coastal environment is particularly susceptible to degradation and loss of habitat.

The main reason for the threat to the natural environment is that certain habitats or resources are not valued enough in any cost/benefit analysis applied to a development project. However tourism can introduce a value directly into any such equation and in the case of nature tourism introduce financial resources directly to the most important and most sensitive environmental sites, namely nature reserves.

10.7.2 Strategic Role

The NCWCD has targeted a number of sites along the Red Sea coast for designation as Nature Reserves (see Appendix A) but at present lacks the resources to implement this programme. Within this list are some sites of enormous visitor appeal that are sufficiently close to existing tourist areas to support a viable tourist enterprise, through the simple role of providing a visitor centre for the Nature Reserve for leisure and educational visitors. This would provide a facility of strategic importance for the locality concerned but more importantly act as a role model for how tourism and the environment can benefit directly form each other.

10.7.3 Potential Locations

The proposed location for the first of such projects is the Marsa as Sarraj, just north of Rabigh and two hours drive north of Jeddah. It is a 200 km area of lagoon and wetlands, the largest landlocked lagoon in the Kingdom with high quality fringing reefs. The following diagram and photographs indicate the potential layout, facilities and appearance of a visitor centre here.

10.7.4 Feasibility

Scale and Quality

The development of a new visitor attraction at a site of nature conservation interest would be a major new initiative in Saudi Arabia and therefore any such project on the Red Sea should reflect the importance of the task in terms of its scale and its quality.

However its capacity should be sympathetic to the setting and the sensitivity of the local environment. In the setting identified on the lagoon north of Rabigh there is already some development on the southern side of the site and good road access, with a two hour drive from Jeddah.

As an initial design – day capacity, it is suggested that the buildings and site should be designed to cater for 1,000 visitors. This would result in about 100,000 visitors per annum.

Cost

It is estimated that a building of this size and nature would cost about 30 million SR, if built to modern standards and with the latest sustainable construction and operating techniques.
10. Product Concepts

Jobs
A facility of this size would require a staff of at least 40 people, including wardens, centre staff and educational specialists

10.8 Cultural Tourism Development Projects & Itineraries

This section outlines the tourism development opportunities for the main cultural tourism destinations in the Red Sea Coastal Zone.

They are:
1. Mada'in Saleh
2. Jeddah Al Balad quarter
3. Red Sea Coastal towns

In addition a project is considered for developing linear heritage attractions.

1. Archaeology based on Mada'in Saleh

Destination
Mada'in Saleh and Al Ula create an important hub of archaeological, historical and natural interest. Mada'in Saleh is a site of international significance that is a destination in its own right. The site is supported by a number of other cultural attractions that will enhance the visitor experience:
- Mount Ethlib
- Al Khuraibah
- Ekmah Mountain
- Pilgrim fort at Mada'in Saleh
- Hijaz railway stations and depots at Mada'in Saleh & Al Ula
- Al Ula old town
- Al Ula Museum

Furthermore the site is located in an area of nature interest.

Links
Visits to the site can also be linked with visits to:
- Sites associated with the life of the Prophet Mohammed (PBUH)
- Tayma archaeological site 250 km to the north-east
- Route of the Hijaz railway
- Desert trekking
- Petra in Jordan
- Mesopotamian civilisations in southern Iraq

Market
The primary tourist markets for Mada'in Saleh are:
1. The majority of international visitors to the Kingdom
2. Expats working in the Kingdom
3. Specialist (archaeological interest) groups

Development of the site
A detailed study of tourism development in and around Mada'in Saleh is produced in the Madinah Al Mukarmarah Provincial Tourism Development Plan. The most immediate concern is for a management plan to be prepared for the site and surrounding area that will ensure adequate protection of this asset and its unique setting.

Precedents
Petra in Jordan is a site from the same period with similar attraction. The site is now being operated under the guidance of a management plan. The site is visited by a wide range of tourist groups, including those travelling up from coastal resorts, those on cultural heritage tours of the region and those with a special interest who are able to spend more time in the vicinity. A historic village, converted to a hotel in part (Taybet Zaman), provides 'traditional type' accommodation with five star comforts. Trips to Petra are also linked to more adventure based excursions to the nearby Wadi Rum and Wadi Araba.

2. Jeddah Al Balad

Destination
The old town of Jeddah, the Al Balad quarter is another site of international historic and cultural significance. In addition to tourism attractions in and around Jeddah (coastal resorts, shopping, the arts) a visit to the old town can also be supported by a number of other cultural attractions in Jeddah, notably:
- Beit Nasif in Al Balad
- Al Balad Museum
- Khuzam Palace area (when developed)
- Independent and private museums
- Antiques shops

A proposed new Aquarium connecting Al Balad to the waterfront once again will add to the tourism interest of the area.

The use of some historic properties as visitor accommodation and/or restaurants serving traditional food of the region will add interest to the area, enhance the visitor experience and engage local users.
The biggest attraction of Al Balad are its unique architectural style, street networks and the life that they embody. Any tourism development must be seen only as a thin layer that is part of a larger urban regeneration initiative. Introducing western ‘historic town style’ characteristics and visitor management into the old town will detract from its appeal.

**Market**
The primary tourist markets for Al Balad are:
1. The majority of international visitors to the Kingdom
2. Expats working in the Kingdom
3. Visitors to Jeddah
4. Local families

**Development of the site**
A detailed study of tourism development in Al Balad is produced in the Jeddah City Tourism Development Plan.

**Precedents**
The historic medina of Fes in Morocco has been implementing a very successful regeneration programme that is increasing the appeal of the historic walled city as a place to live in again as well as a tourist destination. The pedestrian network is maintained and major commercial arteries enhanced. A new system of signage is about to be launched using graphics as the main medium through which to communicate directions and significant historic buildings and places to tourists. The historic city, with support of UNESCO, is incrementally being rehabilitated. A number of schemes are operating where historic buildings have been converted into tourist hotels or are available for short term rental.

3. Red Sea Coast: historic towns and heritage

**Destination**
The historic towns of the Red Sea coast, in particular those to the north of Jeddah could make a significant contribution to the attraction of the coastal areas. Such historic centres not only create an added attraction for tourists holidaying in coastal areas, they also provide opportunities to group cultural activities and provide a focus for visitors.

**Market**
1. Saudi Families holidaying in the area
2. Local families
3. International visitors (GCC) holidaying in the area
4. International visitors travelling on cruises on the Red Sea
5. Diving groups

**Development**
Potential tourism activity in historic centres include:
- Restoring and using a major historic building as a city museum
- Restoring a historic building as a tourism information centre
- Restoring one or several historic properties for use as tourist accommodation (boutique hotel or furnished rental)
- Reviving souq areas for specialist and craft retail
- Reintroducing small traditional cafes in squares
- Utilising open spaces for festival activities
- Restoring and using a historic building as a restaurant serving traditional food from the region

In addition it is essential that the historic centres are also revived for local communities to inhabit so that they can be brought back to life. This may in part be through private ownership as a second home or as public or trust funded projects where rehabilitated houses can be offered at affordable rents.

Cultural heritage attractions on the coast, or those that can be easily accessed from the coast may also become attractive for boat tours or cruises on the Red Sea. There may also be an option to use build and use traditional dows for these journeys for an authentic cultural experience. Various itineraries can be developed starting from different points and travelling north south or south north. Listed from north to south the following stops could be considered:
10. Product Concepts

<table>
<thead>
<tr>
<th>Destination/port</th>
<th>Links to attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tabuk</td>
<td>Arrive at Tabuk airport; Castle, Hijaz railway park</td>
</tr>
<tr>
<td>Duba</td>
<td>Fort and old town; start or end of sailing</td>
</tr>
<tr>
<td>Al Wajh</td>
<td>Historic quarter; Qasr Zubaidah, and wells on the Darb Zubaidah pilgrim route; Access to Mada’in Salah and Al Ula (once road link has been established)</td>
</tr>
<tr>
<td>Umluj</td>
<td>Historic quarter</td>
</tr>
<tr>
<td>Yanbu</td>
<td>Historic quarter</td>
</tr>
<tr>
<td>Ar Rayis Badr</td>
<td>Battle site (could also be accessed from Yanbu)</td>
</tr>
<tr>
<td>Jeddah</td>
<td>Old town (Al Balad); Khuwam Palace Area; other Jeddah attractions; activities; shopping; resorts; Access to Makkah</td>
</tr>
<tr>
<td>Al Lith</td>
<td>Hot spring</td>
</tr>
<tr>
<td>Huraidah</td>
<td>Access to Rejal Alma (Abha Province)</td>
</tr>
<tr>
<td>Farasan Islands</td>
<td>Historic quarter; Diving; Wild life</td>
</tr>
<tr>
<td>Jizan</td>
<td>Fayfa or inland agricultural area; Depart from Jizan airport</td>
</tr>
</tbody>
</table>

Table 10.3 Historic Towns - Heritage Links

Links
In the long term opportunities to develop itineraries with other Red Sea coastal ports in Jordan and Egypt could be considered.

Precedents
Small historic towns in the Czech Republic are marketed as a trail of Bohemian towns. In Romania Saxon villages and castles are similarly clustered in tours of Transylvania. Popular river cruises along the Danube River regularly call in at the cities of Vienna (Austria), Bratislava (Slovakia) and Budapest (Hungary).

4. Developing Linear Heritage attractions
(Route of the Hijaz Railway)

The Hijaz Railway is presented as an example of how linear attractions can be developed. The parallel running of several other routes (pilgrim, frankincense) to the line of the Hijaz Railway means that these aspects could be developed together.

Background & Condition
Completed in 1908, the significance of the Hijaz Railway is not only the railway itself but the parallel routes that lie in close proximity to it, including the south to north route through which Frankincense traders moved from Oman to the Eastern Mediterranean ports, and the main pilgrim routes from the north, in particular, Egypt (land route), Turkey and the province of Sham. Although a much larger proportion of pilgrims today travel by air, there are still large convoys that arrive by bus travelling down the main motorways that pass close to and sometimes through some of the old pilgrim towns and the route of the Hijaz Railway.

Today, although the track has been removed, sections of the track bed and the many stations, placed about 20 kms apart, remain. In this context the railway also has a landscape value, in the way that the line, abandoned stations and even carriages can still be seen in the landscape. Some of the stations are in a poor condition, but the Mada’in Saleh and central Madinah City stations have been restored to be used as museums. Recently some of the railway buildings in Tabuk have been restored as a railway park. The restored buildings, however, are not being properly maintained and the hard landscaping work carried out around the former station buildings is insensitive to the buildings and their setting. With the exception of major centres like Tabuk City and Al Ula, most of the other station buildings and features of the railway are not near tarmac roads and are difficult to access. One of the unique features of the railway line is the still intact tunnel located some distance south of Tabuk City.

Table 10.4 Constraints and Opportunities

<table>
<thead>
<tr>
<th>Constraints</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Limited access to parts of the railway due to private ownership of land and forbidding terrain; • Difficulties of managing remote buildings and structures; • Prohibitive cost of rebuilding railway lines in order to re-active operational sections of railway.</td>
<td>• An interesting and unique attraction for the region; • Recognised historic value and associations; • Impressive setting and landscape value; • Links to other heritage attractions and cultural routes; • Trans-national links to other Hijaz Railway attractions in the Middle East</td>
</tr>
</tbody>
</table>

Historic railways and tourism
Historic railways are increasingly becoming a tourist attraction. For many years, the famous Venice Simplon-Orient Express, immortalised by Agatha Christie, has been running exclusive packages with various itineraries across Europe. In Britain the railway heritage is well preserved, much of it supported by railway
enthusiasts. Attractions range from a National Railway Museum (York), to smaller museums, workshops and sections of line running historic steam trains through, often scenic, routes across the country. In India the railway heritage is also well preserved and is being adapted for tourism purposes. The famous Darjeeling Himalayan railway has now been designated a World Heritage Site, while the railway museum is one of the major museums open to visitors in Delhi.

The main attractions that can be offered by railways include:

- A ride or even journey undertaken on an old train and/or on a historic route.
- Railway museums where a collection of historic locomotives and tenders can be seen and their workings demonstrated. Many major railway museums have developed substantial linked activities and educational programmes for children and family visits.
- Stations or other railway buildings that are redundant, still in use or used for other purposes and are interpreted for the benefit of visitors.

The section of the railway between Damascus and Amman still survives and a double arched bridge south of Amman has become a symbol of the railway. In Damascus the workshops are still in use preserving and maintaining the trains and a private venture, named the Hijaz Railway Company, has been set up to operate a tourism venture using the 95 year old trains. In Amman in Jordan, the old Hijaz Railway station is open to the public as a small railway museum.

The Hijaz Railway will only become a unique tourism attraction in the region if the buildings, structures and its landscape setting can be adequately protected. From a heritage protection point of view, the following priorities have been identified:

- Safeguarding buildings and structures belonging to the Hijaz Railway;
- Safeguarding and ensuring safe and appropriate storage of memorabilia and other moveable objects (including railway carriages) belonging to the Hijaz Railway or associated with it;
- Preserving the landscape setting of the line, including the raised track bed;
- Maintaining the integrity of the railway through development control measures along the line.

Tourism development proposals

In respect of the identified visitor markets, the following visitor needs might be considered:

- Safe access to various sections of the railway;
- Interpretation and education facilities;
- ‘Experience’ of the railway through segments that might become operational.
10. Product Concepts

These needs can also be spread out onto the geographic expanse of the line and development focused on various types of activity and levels of access to the various visitor groups. A strategy for the development of the Hijaz Railway as a tourism attraction in the Kingdom is therefore:

- A major Hijaz Railway Museum (of national significance)
- Major nodes where visitor and interpretation centres are provided
- Secondary nodes that link the railway to other cultural heritage sites
- Segments of railway that might become operational
- Interpretation and information provision for the entire length of the railway

**National Museum**

Museums are the best vehicle for conveying the history and technology of the railway.

The Provincial Tourism Masterplan for Al Madinah Al Munawwarah identifies the development of a National Museum of Transportation at Al Makheet station on the outskirts of Madinah. Madinah is a significant urban centre and a major destination for Saudi and Muslim visitors.

**Nodes**

Three major nodes where smaller museums or visitor centres can be located have been identified as:

- Tabuk railway park
- Mada'in Saleh railway station and sheds
- The terminus station in Madinah

In Tabuk, the railway buildings are contained in park where there is opportunity to develop a visitor centre alongside railway related activities, such as a miniature railway. The park will serve local residents and also tourists passing through the city. Its development would focus on interactive exhibits that would appeal particularly to young people and families.

Mada'in Saleh has already been identified as being one of the major cultural heritage destinations in the Kingdom of global significance. The rock cut tombs of the Nabatean settlement, a second Petra., with its stunning setting is a ‘must see’ attraction. The ancient Nabatean settlement is also supported by several other attractions, including the old village of Al Ula, other archaeological sites including rock art sites and a pilgrim fort. The Hijaz Railway sheds and workshop at Mada'in Saleh and two stations (Mada'in Saleh and Al Ula) are valuable additional attractions to this cultural tourism destination.

In addition to the above, the restored terminus station at Madinah will continue to function as a leisure destination offering short steam-hauled rides through the station yard, interpretive displays and walks through parkland created around the terminus building.

Alongside the Museum in Madinah, these centres provide an opportunity to provide focused interpretation and activity around the railway.

**Secondary nodes**

These will follow on from the development of the major nodes. They could include Dhat Al Haj, close to the Jordanian border, accessible on an asphalt road, and including a station, a fort and part of the railway line. There are also a number of other sectors where the stations are in close proximity to an old fort and pilgrim route, some of which can only be accessed in 4X4 vehicles. Secondary nodes are more likely to appeal to specialist groups following the line of the railway.

**Operational segments**

There are several sections of railway that could be rebuilt to enable visitors to ‘experience’ a journey on the Hijaz Railway. The restoration of the line between Al Makheet and Al Hafeera stations in Madinah to support steam-hauled journeys could be linked to the Railway Museum. A small visitor centre would be created at Al Hafeera, providing basic tourism services so that visitors could break their trip before journeying back towards Madinah.

A more ambitious project would be the restoration of a section of the line between Mada'in Saleh and Al Ula, to transport tourists from the resort hotels in Al Ula out to the Nabatean ruins at Mada'in Saleh and to the desert landscape of Jebel Ethrib.

A further and longer term option might be to develop the section of railway between Tabuk City and the tunnel that is located to the south of it.

All of the above projects require considerable capital investment including land acquisition (much of the original track bed around Al Ula, for instance, has been incorporated into private landholdings), restoring the station buildings, consolidating track beds and installing coal drops and water towers. One early steam locomotive is already in full working order in Madinah, having recently been restored and several original Hijaz Railway coaches are also in the process of restoration.
Interpretation and information

Visitor interpretation at protected areas and cultural heritage sites is virtually non-existent at the present time in the Kingdom. Interpretation is essential so that visitors can appreciate and understand what they are seeing. If attraction sites are not made interesting to visitors through effective interpretation, they will not want to visit the sites. A system of directional signs is needed so that tourists can easily find the sites. At all sites, at least one interpretive sign is essential and sites that are complicated or have many visitors should have several interpretive signs.

The Hijaz Railway has a very distinctive identity and within a national framework of directional, presentation and interpretation signage there is the opportunity to create a distinct set of signs and boards that clearly signal the railway. It is recommended that the signs are used at the Museums, railway park and sheds as well as means of interpretation at stations, including those in remote locations. Interpretation signs would include a map of the railway, placing the given point into context as well as links to close by railway and other cultural heritage attractions (e.g. forts or old caravan routes).

10.9 Sports & Leisure Events to Develop Tourism

A full range of sporting events in Jeddah will be an attraction to develop domestic, regional and potentially international tourism.

Sports and Leisure related events, conferences, competitions and tournaments would attract visitors to Jeddah and the west coast of Saudi Arabia.

Types of Events

Water based events

Jeddah has a waterfront which would make an excellent venue for a wide range of water sports events.

Events could be held along the northern coast of Jeddah, Jeddah Creek, Obhour Creek and as far north as Durrat Al Arous. Types of events include Formula 1 Powerboats, Jet Ski, Hobbie Cats, Sailing, Wind surfing and water skiing.

An example of a water sport event to consider would be Formula 1 Powerboat Racing. The F1 Powerboat Circuit Grand Prix currently does include racing at venues in the Middle East (Qatar and United Arab Emirates) and there is a gap in the circuit for an additional venue. Jeddah would make a perfect venue for a F1 Powerboat race. The water space required is not large, a circuit course which allows for spectator viewing of the event. The Creek, Obhour or Durrat Al Arous would be ideal.

Formula 1 Powerboat Circuit

Formula 1 Powerboat Racing is an exciting sport to watch and this event would attract visitors from all over Saudi Arabia and potentially the Middle East.

The event would be attractive to the media and would be an excellent method of marketing the region as a tourist destination if the event promoted the beaches, resorts and leisure opportunities.

Currently one of the team drivers of Team Green is a Saudi Arabian national and wears the Saudi Arabian badge on his clothing. Sponsors for the event could be easily sourced and the sport has a ready made role model in the form of the KSA driver Laith Pharaon.

Saudi Arabia Flag on side of boat

Land based events

The Middle East now hosts a wide range of sporting events and several are now being run at international standard gaining world wide coverage.
Events include the Dubai Golf Desert Classic, PGA Qatar Masters, Dubai ATP Tennis Tournament, Qatar ATP Tennis Tournament, Dubai Rugby 7’s Tournament, Bahrain Formula 1 Championships, Dubai Marathon, Dubai Jet Ski Race, Dubai Autodrome LG Super Racing.

The events are well attended and receive excellent media coverage.

Dubai

Bahrain

Qatar

Facilities in Jeddah
Jeddah has several excellent sports and leisure facilities to host quality competitions such as the stadiums at Al Ittiad Football Club and Al Ahli Football Club, the National Stadium, Sports City 50m Swimming Pool and Indoor Stadium with seating for 5,500.

Coastal Sports City in the heart of Jeddah on the creek is an excellent facility for competitions and events.

Although Jeddah has a number of top class sports facilities, the majority of sports facilities are based at residential compounds and hotels and are therefore not accessible to the general public. The residential compounds offer excellent sports provision, namely tennis courts, swimming pools and gymnasiums.

Durrat Al Arous and the Obhour Creek are ideal for water sport events.

There are numerous small resort facilities along the coast north of Jeddah. They are all exclusive and relatively expensive. Other resort facilities are linked to the hotels and can be used by Jeddah residents who take out a membership or pay a daily rate. The resorts will attract domestic tourists and can be used as a venue for events, but do not currently provide facilities or equipment for major sports events.

Jeddah’s Infrastructure
Jeddah has the facilities to support major sports events and competitions.

Jeddah has a wide selection of hotels, but they do tend to target the higher end of the market in regard to price. The InterContinental chain has identified this fact and are planning to build a Holiday Inn Express in Jeddah which can offer more affordable hotel accommodation.

The city has three airports and good road networks from the north, west and eastern regions of the country.

Jeddah also has a Youth Sports Complex which can accommodate teams. The facility is excellent for junior clubs that are aiming for self contained accommodation.

Recommendations
Jeddah’s current event schedule does not include any major sports events and there is huge potential to develop this to attract competitors, visitors and tourists to Jeddah.

Sports events management is complex and it takes many years for major events to be developed and
templates established for the events to be established in the relevant sporting calendar.

To support the overall objective of increasing tourism to Jeddah, it is recommended that the sports events are aimed at national or gulf market (Saudi Arabia, Kuwait, Bahrain, Egypt, Syria, Qatar, United Arab Emirates, Yemen).

Jeddah (Saudi Arabia) need to bid to host any major sports events that take place within the Gulf Region (Asian Football Cup, Confederation Football).

Events which attract large numbers of spectators and are new to the region would be ideal. For example football, basketball, power boat racing are sports events that meet the criteria.

Events or competitions aimed outside of the Gulf region would be excellent to promote Saudi Arabia and can be considered in the future when event management experience has been gained.

Major events such as the Para Olympics, Olympics or Football World Cup can be considered in the future.

Table 10.5  Recommended event plan

<table>
<thead>
<tr>
<th>Year</th>
<th>Gulf Sports Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1</td>
<td>3</td>
</tr>
<tr>
<td>Year 2</td>
<td>3</td>
</tr>
<tr>
<td>Year 3</td>
<td>4</td>
</tr>
<tr>
<td>Year 4</td>
<td>5</td>
</tr>
<tr>
<td>Year 5</td>
<td>6</td>
</tr>
</tbody>
</table>

A steady increase in the number events scheduled for the year is recommended. Once an event has been run a plan of action for the event has been established and implemented and the event can be run with ease the following years. The recommendation is therefore to start with three sports events in the first year, rising to 6 sports events by year 5.

It is recommended that the events are aimed at the Gulf Countries for the first five years.

The visa/entry restrictions that are currently in place, the barriers for women's participation or spectator at events are issues and running events with Gulf Countries participating is the preferred option.

Strategy

A study is required to identify the types of sports events to take place in Jeddah to achieve the aim of increasing the tourist numbers to Jeddah and surrounding areas. A 'Sports Events Strategy & Implementation Plan' is required. This study and report only identifies the need for sports events and the benefit that Jeddah and Saudi Arabia would gain from hosting the events.

The aim is to get 6 major sports events taking place every year. This target is achievable and the schedule of events would not be to demanding, averaging an event every two months.

Long Term Issues related to Sports & Leisure in the Jeddah Region

1. Lack of sports and leisure provision in Jeddah

As identified previously, the majority of the population does not have access to any sports and leisure provision. Provision is currently only available to the few elite and privileged members. With the expected doubling of the population in the next ten years and the relatively young population (60% under the age of 20 years), there will be serious health issues for the nation in years to come.

A 'Sports Facilities Strategy' is required to identify the current sports and leisure provision in Jeddah, the quality of provision and a recommended development plan for future developments.

2. Low Participation Rates

Participation in sport or physical activity is very low in Jeddah and Saudi Arabia. This is due to the culture, the restrictions, the lack of sports and leisure provision for the general public and the lack of grass roots sports and organized activities.

To address this issue it is recommended that a 'Sports & Physical Activity Strategy & Implementation Plan' is produced with clear aim and objectives to solve this problem.

3. 'Grass Roots' Sports Development

There is a need to develop sports development programmes for the children.

There are excellent facilities for the top performers at Al Ittiad and Al Ahli and other such clubs that develop the top junior performers to participate in a variety of sports such as football, swimming, table tennis, handball etc.

Away from these clubs there is a need to offer sports programmes to the majority of the junior population. The benefits include talent identification, in-
creased sports and leisure participation, longer term involvement in sport, better health and increased social interaction.

To address this issue there is a need to produce a 'Sports Development Strategy'.

Facility Developments - Recommendation
There is an opportunity to develop new sports facilities in Jeddah that would attract visitors and also be used by the local population. An example would be to build indoor football facilities. The heat and climate during the summer months is not suitable for playing football outside and therefore an indoor facility would be a major attraction. JJB Soccer Domes have been established in the United Kingdom. JJB Soccer Domes are indoor facilities that have up to twenty indoor 7-a-side pitches and ten outdoor 7-a-side pitches. JJB facilities also include a health and fitness centre, sports equipment and clothing store and a fast food style restaurant.

The Soccer Domes provide coaching for the development of grass roots football, and organize junior and adult football leagues. The Soccer Domes provide excellent venues for tournaments, competitions and provide a venue for the general public to participate.
Additional Recommendations

11.1 Introduction

In addition to providing guidance on the type of development that could be considered along the Red Sea, this report also considers some of the operational implications of such development for the effective protection of the environment and management of tourist activities.

Featured in this section are issues such as:

- Diving Regulations
- World Heritage Site Nomination
- Public/Private Sector Partnerships
- King Abdullah Economic City

11.2 Diving Regulations

The SCT Taskforce on Diving concluded that amendments be made to the current powers of the various bodies involved in the regulation of this sector.

These included:

Coastguards
- to pass issuing of permits to go into the sea to other authorities for areas near beaches and dive centres.
- to allow licenses for foreign dive boats issued from their own countries or recognised organisations to be accepted.

Ministry of Agriculture
- to give dive centres the power to issue licenses based on PADI regulations, after the qualification of the centres by the Ministry of Agriculture or another qualifying body.
- to recognise international licences for dive trainers.

Ministry of Transport
- extend dive boat licences from one year to three years.

It also concluded that the SCT adopt some general policies for diving:
- To activate the SCT role and responsibilities in developing, organising and supervising the core fields in tourism as stipulated in its Statute.
- To co-ordinate between relevant bodies in the field of diving tourism.
- To overcome obstacles facing the diving activity, and to provide incentives and facilitation to investors.
- To highlight the Kingdom’s potentials in marine organisms and coral reef in its marine environment especially in the Red Sea.
- To develop the diving tourism as one of the core fields of tourism and as an economic resource.
- To work towards developing and supporting diving tourism while taking into account environment precautions to ensure the existence and safety of marine life and coral reefs.
- To specify the relevant bodies that will assume the role of controlling and monitoring environment precautions and to identify necessary procedures for this.
- To prioritise work and investment in this field for local residents and residents residing near areas targeting for this development.

11.3 World Heritage Site Nomination

At the present time there is no part of the Red Sea that is inscribed on the World Heritage List. The current tentative list also indicates that there are no forthcoming nominations in the near future.

The Red Sea coast could be nominated as:
- Natural site
- Natural and cultural site (mixed)

The World Heritage Convention considers the following as ‘natural heritage’:
- natural features consisting of physical and biological formations or groups of such formations, which are of outstanding universal value from the aesthetic or scientific point of view;
11. Additional Recommendations

- geological and physiographical formations and precisely delineated areas which constitute the habitat of threatened species of animals and plants of outstanding universal value from the point of view of science or conservation;
- natural sites or precisely delineated natural areas of outstanding universal value from the point of view of science, conservation or natural beauty.

Given the rich cultural heritage of the Red Sea, its links to ancient and more recent trade routes, prehistoric settlements on its coasts and numerous shipwrecks within its waters, UNESCO is likely to recommend a mixed natural and cultural site nomination.

Any nomination of the Red Sea or Red Sea coast as a World Heritage Site (natural) would need to involve the countries surrounding the Red Sea with responsibility for the management of the marine environment. In this respect a trans-boundary nomination involving the various State Parties may need to be considered. Alternatively a nomination by Saudi Arabia would need to demonstrate that a multi-state collaborative management system was in place to safeguard the site.

**Benefits of inscription**

Inscription of a property on the World Heritage List can produce a number of benefits:

- Increase in tourism
- Better management of natural and cultural resources
- Benefits to local communities, particularly in terms of employment as well as benefits arising from better planning and management of resources
- Cultivation of local and national pride in the site to develop feelings of national responsibility to protect the area.

**Procedure**

At least a year prior to a nomination being made a site must be registered on UNESCO’s tentative list. Nominations of properties not on the tentative list will not be considered by the World Heritage Committee. Saudi Arabia has not as yet submitted a tentative list of sites to UNESCO.

A nomination document must be prepared involving a wide range of stakeholders. The nomination document will include details of the site and a statement of universal value.

All properties inscribed on the World Heritage List are expected to have adequate long-term legislative, regula-tory, institutional and/or traditional protection and management to ensure their safeguarding. The State Party making a nomination is expected to demonstrate (through documentation appended to the nomination) that legislative and regulatory measures at national and local levels are in place to assure the survival of the property and its protection against development and change that might negatively impact the outstanding universal value, or the integrity and/or authenticity of the property.

Each nominated property should have an appropriate management plan or other documented management system which should specify how the outstanding universal value of a property should be preserved, preferably through participatory means. The purpose of a management system is to ensure the effective protection of the nominated property for present and future generations. All nominations must be accompanied by a management plan.

The advisory bodies to the UNESCO World Heritage Committee are:

- IUCN (World Conservation Union) for natural sites
- ICOMOS (International Council on Sites and Monuments) for cultural sites

The nominated site will be evaluated by IUCN (in the case of natural sites) or ICOMOS (in the case of cultural sites) representatives, who will report back to the World Heritage Committee with their recommendations.

A nomination is put before the World Heritage Committee with the recommendations from ICOMOS and IUCN, and with the approval of the committee at its annual session, a site will be inscribed on the World Heritage List.

Once inscribed a World Heritage Site will continue to be monitored by UNESCO on a regular basis.

In the event that ascertained or potential threats to the universal value of a site are noted, the committee may choose to place a site on the list of World Heritage Properties in Danger.

Further information on nomination and requirements of the World Heritage Convention can be obtained from the Operational Guidelines (2005) published by UNESCO.

We would recommend that the Supreme Commission for Tourism makes contact with IUCN and ICOMOS.
for advice on how to proceed. The Kingdom of Saudi Arabia is a state member of IUCN and has an active Saudi ICOMOS national committee.

Trans-boundary inscription
The operational Guidelines recommend that:
Wherever possible, trans-boundary nominations should be prepared and submitted by States Parties jointly. It is highly recommended that the States Parties concerned establish a joint management committee or similar body to oversee the management of the whole of a trans-boundary property.

Precedents
Although there are 160 natural sites inscribed on the World Heritage List, only a small number are similar in character to the Red Sea coast. These are:

- Great Barrier Reef – Australia (1981)
- Belize Barrier Reef System (1996)

The Great Barrier Reef in Australia has been a World Heritage Site since 1981. Although it is inscribed as a natural site, more recently cultural aspects of the site including 30 shipwrecks and archaeological sites of Aboriginal origin are also recognised as part of the site’s value.

About 98 per cent of the World Heritage Property is within the Great Barrier Reef Marine Park. The Great Barrier Reef Marine Park was declared in 1975 with the purpose of preserving the area’s outstanding biodiversity whilst providing for reasonable use. This has been achieved using a spectrum of zones ranging from General Use Zones to Preservation Zones. In very broad terms, these zones allow ecologically sustainable activities, but all have an overriding conservation objective. Most reasonable activities such as tourism, fishing, boating, diving and research are permitted to occur but are controlled through zoning and management planning to minimise impacts and conflicts with areas of high conservation value and other users.

The Australian Government and State Government have a cooperative and integrated approach to management of the Great Barrier Reef World Heritage Area. The Great Barrier Reef Marine Park Authority (GBRMPA) is the Australian Government agency responsible for overall management, and the Queensland Government, particularly the Queensland Parks and Wildlife Service, provides day-to-day management to the Authority. Integrated management is also assisted by:

- a Commonwealth Act specifically for the Marine Park that, if necessary, provides over-riding powers;
- complementary legislation for most adjoining State waters;
- formal agreements with Queensland, and with various government departments, industry, research institutions and universities; and
- strategic zoning plans and site-specific management plans

For more information: www.gbrmpa.gov.au

The Dorset and East Devon Coast (the Jurassic Coast) in England was inscribed in 2001, mainly for the geology. A management plan is available for the site and can be downloaded from www.jurassiccoast.com.

11.4 Public/Private Partnerships in Sports, Leisure & Recreation

Jeddah can offer a variety of sports, leisure and recreation facilities that encourage visitors to travel and stay in Jeddah from other parts of Saudi Arabia and Gulf countries.

There are a number of excellent sports facilities in Jeddah, such as Jeddah Football/Athletic Stadium and the 50m swimming pool and indoor sports arena at Jeddah Sports City. There are a number of private sports clubs and company sports facilities in Jeddah. The majority of sports provision is based within residential compounds (tennis courts, swimming pools, gymnasiums). There is an under provision and a lack of access of sports facilities for the general public in Jeddah.

Leisure and recreation facilities include ice rinks, ten pin bowling alleys, water park, rides and theme parks, rest areas along the corniche, shopping malls and beach resorts.

The current stock of leisure and recreation facilities tend to be dated and in need of investment. For example the ride and theme parks along the northern section of the Jeddah coast near the Sheraton Hotel are old, tired and seldom used or in operation.

Certain facilities are popular, well used and do attract visitors. For example the ice rink, ‘Iceland’, at the Ship Roundabout on Prince Sultan Street is extremely busy and it is common to have people waiting to use the
rink. The rink is very busy till the early hour of the morning.

There is the potential for private investors to develop additional sports, leisure and recreation facilities.

Potential developments include Indoor Soccer facilities, Indoor Ski Dome, additional full size ice rink, indoor play areas, upgrading of amusements parks, aquarium and theme parks and additional grand shopping malls incorporating leisure and recreation provision.

Public Private Partnerships – examples of Best Practice
The approach needs to be based on the development of Public Private Partnerships.

The authorities in Jeddah need to identify an area in or around Jeddah for the development of a tourism zone.

A current problem is the lack of land use planning and the fact that the present tourist attractions are not in any specific area of the city.

Examples of best practice include Dubailand and Dubai Sports City in the United Arab Emirates. Both projects will be major attractions and will encourage people to visit Dubai and the United Arab Emirates.

Dubailand
The objective of Dubailand is to be an innovative, awe-inspiring development that represents an integral part of Dubai’s bold vision to become the tourism, leisure and entertainment capital of the Gulf region. In addition, Dubailand aims to be the biggest, most varied, leisure, entertainment and tourism attraction on the planet. Dubailand will incorporate 6 themed worlds and be comprised of over 200 individual projects. Dubailand will include sports facilities, theme parks, eco-tourism resorts, museums, galleries, spas, shopping and recreation venues.

Dubai Sports City
Dubai Sports City is an area being developed under the auspices of Dubai Development Investment Authority. Dubai Sports City is a part of Dubailand. The project is in line with the intentions of the Dubai Development Investment Authority and the tourism governing body to transform Dubai into a centre of excellence. Private investors include Manchester United Soccer School, Ernie Els Golf Course, David Lloyd Tennis Centre and a Butch Harmon Golf Academy.

Recommendation – Development of Jeddah Tourism Zone
A recommendation is for the Government and Authorities of Jeddah to investigate the potential of developing an area of Jeddah on a Public Private Partnership basis. The type of facilities Jeddah should aim to develop include a Ski Dome, Water Park, Pool Facilities, Leisure & entertainment facilities, Aquarium, Extreme sports, Indoor stadium – mixed use, Winter Training facilities for International Clubs, Sports Clinic, Sports Academy and an Attraction Park.

The aim of this development is to base all tourist attraction in one specific area of Jeddah. Tourists can therefore enjoy the beach and resort facilities along the corniche, Creek and beaches; and visit a range of tourist attractions in one specific area of Jeddah (Jeddah Tourism Zone).
There is a need to develop a Jeddah Tourism Zone strategy and implementation plan and to identify private partners that will invest in building new sports, leisure and tourism provision in Jeddah, thereby regenerating the area and bringing in new users and visitors to Jeddah from the west coast region, other areas of Saudi Arabia and International visitors.

11.5 King Abdullah Economic City

11.5.1 Introduction

In December 2005 a major development project was announced as being ‘at the forefront of Saudi Arabia’s drive for diversification and expansion’.

Covering 55 million square metres of coast area, at Rabigh it would take up 35 kilometers of coastline. The following section is the description of the project by Emaar, the Dubai based developers.

11.5.2 Masterplan Location

Strategically Accessible. By land, air and sea. King Abdullah Economic City will benefit from a strategic location, placing it less than an hour’s ride away from the Holy Cities of Mecca and Medina, and an equally short ride away from the commercial hub of Jeddah. Besides accessibility, this location allows the city to be a nucleus for a highly integrated transport system, covering land, air and sea.

By land, KAEC is linked to the rest of the Kingdom by an existing network of highways. Located on the Red Sea, the City’s port will provide a much-needed stop for freighters en-route between the Mediterranean and the Indian Ocean. Moreover, with Rabigh Airport a short distance away from KAEC, air-borne traffic becomes the third mode in an integrated transport system, which serves individuals and goods alike, and gives investors easy access to domestic, regional and global markets.

Overview

Spread over 55 million square meters, King Abdullah Economic city will be divided into six distinctive zones, each making contributions, over several sectors, to the city’s fulfilment of its objectives.

In every one of the six zones, investors are presented with limitless opportunities in countless disciplines. The mega-project will attract unprecedented amounts of private capital, both domestic and foreign, to take advantage of opportunities in property development, commerce, industry, finance, hospitality, education, recreation and healthcare, among others.

The first of King Abdullah Economic City’s six zones is a world-class Sea Port, which will provide a magnificent trans-shipment hub. The second zone is an Industrial District that will be a powerhouse for manufacturing and logistics. The Resort zone provides Saudi Arabia with a luxurious holiday destination, while the Financial Island will make the kingdom a world-class capital for finance and commerce. Fifth in the city’s repertoire is the Education Zone, equipped with the best educational programs to ensure a rich learning experience. Lastly, the Residential Area will provide the basis for a thriving community that offers the very best in living standard.

Vision

An integrated economic zone that embodies a new way of thinking

A shining example of leadership, the Custodian of the Two Holy Mosques King Abdullah bin Abdul Aziz Al Saud is spearheading the Kingdom of Saudi Arabia into a dynamic global force. Emaar, the pioneers of community planning, are now accelerating the fulfilment of the King’s progressive vision through the creation of King Abdullah economic City (KAEC), an integrated “mega city” that will be at the forefront of Saudi Arabia’s drive for diversification and expansion.

With the empowerment of private investment ranking high on the list of economic priorities of the Kingdom’s leadership, KAEC provides investors with a gateway to such empowerment. Bringing forward a new vision, King Abdullah Economic City allows the private sector to actively help in, and benefit from, the creation of an ultra-modern metropolis in western Saudi Arabia, built around a multi-faceted economic hub that is certain to play major roles on the domestic, regional and global levels.

Facilities for Investors

With the active participation of the Saudi Arabian General Investment Authority (SAGIA), King Abdullah Economic City will create a pro-business environment. The Investor Service Centre is designed to carry out one of SAGIA’s main functions; facilitating the provision of services to potential investors.

Through this Investor Service Centre, SAGIA will provide a “one-shop shop” solution aimed at minimising the number of formal steps associated with investment in the Kingdom.
11. Additional Recommendations

Sea Port
Strategically located, the Sea Port at King Abdullah Economic City will act as an excellent link between the Kingdom of Saudi Arabia and the rest of the world, and an additional link between the continents of Europe, Asia and Africa.

Spread across 2.5 million square meters this port will boast the most sophisticated and advanced craning systems, as well as state-of-the-art GIS and GPS data management networks, to effectively and efficiently guide development and maintenance, and ensure timely movement of port operations. A major high point of this port will be its capacity to receive the world’s largest “mega-vessels”, a feat very few ports have achieved.

- Capacity to handle millions of TEU’s each year
- Capability to moor mega-vessels

An inlet for sea-borne pilgrims
To take advantage of King Abdullah Economic City’s proximity to the holy cities of Mecca and Medina, KAEC’s seaport will include a passenger ship terminal, capable of receiving 300,000 pilgrims every Hajj season.

Functional throughout the year to receive other passengers, including those arriving to perform the lesser pilgrimage of Umra, the purpose-built Hajj terminal will be complemented with adjoining hotels, medical centres and world-class amenities.

Industrial District
Manufacturing & research hub
Throughout its Industrial District, King Abdullah Economic City offers every conceivable advantage to industry and emerging technologies. In its first phase, the centrally located district offers built-up spaces of 6.24 million square meters, dedicated to light industries as well as research and development laboratories that will work with universities and education centres to further hone Saudi talent and expertise.

The Industrial District will open the door for the Saudi economy to expand its oil and natural gas-related industries, their by-products as well as pharmaceuticals. In addition to encouraging the creation of processing and manufacturing units the Industrial District will promote innovation and research in many industrial and technological domains.

- Some of the petrochemicals that can be produced from raw materials from the neighbouring city of Yanbu: Acrylic Acid, Acrylonitrile, Ammonia, Aminated Bisphenol A, Butene-1, Caprolactam, Cumene, Cyclohexane, Ethylbenzene, Ethylene, Ethylene Glycol, Ethylene Oxide.
- Some of the oil and gas by-products generated throughout the Kingdom, which can be processed at King Abdullah Economic City: Linear Olefins, LLDPE, Maleic Anhydride, Methanol, N-Butanol, Oxygen/Nitrogen Gas, Phenol, Polypropylene, Propylene, Propylene Oxide, Syrene/Polystyrene, Urea, Vinyl Acetate, Monomers.
- Some of the activities available in the Industrial District: manufacturing and fabrication, downstream petrochemical processing, community and commercial services, industry support services, maintenance and sales, industrial product processing, community and commercial services, industry support services, maintenance and sales, industrial product distribution, transportation and trans-shipment, food and agricultural packaging, construction industry products, research and development, information technology, pharmaceuticals, marine industries, environmental industries, downstream minerals, business incubators.

Financial Island
A hub for finance and investment
Designed to become an international financial capital of the modern business world, the Financial Island will make a statement on behalf of the Kingdom of Saudi Arabia clearly underlining its status as the region’s largest economy. The Financial Island will be home to the assets and funds of the world’s biggest financial institutions, including banks, investment houses and insurance companies.

- 500,000 square meters of Class A offices
- 60,000 square meters of convention centres and hotels
- 1,200 business hotel rooms

This ultra-modern part of King Abdullah Economic City will benefit from a state-of-the-art communications and IT infrastructure, helping secure a prominent position for the kingdom in the knowledge-based economy of tomorrow. The Financial Island will provide half-a-million square meters of Class A offices in a variety of modern buildings, including two towers reaching heights of up to 100 storeys.

Resorts
A regional destination for rest and recreation

King Abdullah Economic City features a waterside Resort where one can expect the most refined levels of comfort, relaxation and recreation. Set to become a major destination on the map of Saudi Arabia and the map of the Middle East as a whole, the Resort will include hotels, shopping centres and other recreational facilities, all built along a pristine part of the Red Sea coastline.

Among the tourist draws at the Resort is a championship-standard, 18 hole golf course, complete with training facilities and driving range. Adding to KAEC's resort appeal will be an equestrian club, a yacht club and an exciting range of water sports that will take full advantage of the Red Sea's clear blue waters and unspoiled beaches.

- 18-hole championship golf course
- Equestrian club
- Yacht club

World Class hotels and amenities

The Resort area of King Abdullah Economic City will draw both local and international tourists with a host of world-class services. In terms of accommodation, the Resort's area will provide over 3,000 luxury tourist units, including hotel rooms, suites and short-term occupancy apartments. Designed to cater to a wide variety of needs, the area's repertoire will include the highest quality bungalow-type and boutique hotels (75 to 150 rooms), mid-size holiday retreats (350 to 400 rooms) and large resort hotels (500 to 600 rooms).

The KAEC Resort Zone will also offer a limited number of luxury residential properties, including golf course villas. Lavishly designed shopping centres, restaurants and cafes will further add to the charm of a magnificent destination designed to enhance the tourism industry in the Kingdom.

- 3,000 hotel rooms
- Luxury residences on the golf course
- 4.05 million sq.m. of resort property

Residential

Three residential districts. One vibrant lifestyle. Luxury and serenity are two hallmarks of the lifestyle offered by King Abdullah Economic City to the multitudes that will call it home. The city's Residential Area will be divided into three key districts, providing numerous opportunities for business and investment in property development, whether for residential, commercial or recreational use. Each of the three districts will have its own unique character, brought about by the prevailing use of land in built-up space.

Not only will King Abdullah Economic City be a permanent home for around half-a-million residents, but it will also play host to thousands of tourists and intense transient traffic throughout the year. To cater for such multitudes, the city offers a variety of residential properties, ranging from mid-rise buildings to secluded detached homes. Each of KAEC's residential districts will also feature public amenities, such as mosques, souks and recreational venues.

The Town Centre

At the heart of King Abdullah Economic City is the Town Centre district, which contains a mix of commercial, retail, civic, cultural, religious and residential uses. Offering the very finest choice of shops, leisure amenities and luxury apartment living, this district will compromise a wide variety of signature buildings and towers. With its rich architecture and traditional elements – such as souks – commonly found in all major cities of the Middle East, the Town Centre will act as the “heart” of the city. A prominent feature of this district is an iconic Grand Mosque that pays tribute to Saudi Arabia’s status as the heart of the Muslim World.

The Town Centre is inter-connected by a network of open spaces, plazas and promenades, creating a pedestrian-friendly environment. In addition to luxury apartment buildings with seafront views, the Town Centre will feature traditional souks and modern shopping centres, helping establish King Abdullah Economic City as a prominent shopping destination, both for the region and for the world at large.

- Medium-density, mid-rise buildings
- Iconic Grand Mosque
- Traditional souks and modern shopping centres

The Corniche

The Corniche district is the second of King Abdullah Economic City's residential offerings. This large, trendy, mixed-use environment is orientated towards the bay, and has an artistic feel with traditional Islamic overtones. The various building types will have a mixture of expression and character, ranging from the more traditional to transitional and contemporary architecture.

With a long corniche that contains housing, restaurants and cafes, connected by a carefully designed sequence of larger open plazas and parks, the Corniche district will play host to many a memorable moment in the
lives of residents and visitors alike. Yachts and boats fill the Marina along which the Corniche district is laid out, creating an impressive spectacle for those seeking a nautical atmosphere.

- Corniche running around a marina housing a yacht club
- Modern luxury with hints of traditional architecture
- Luxury apartment blocks with breathtaking views of the marina

The Waterfront Villas
The Waterfront Villas district is a luxury residential community surrounded by water and water-related recreation. Many of the large single-family detached villas here have direct waterfront access, including private boat docks. Other villas enjoy the use of jetties located in their close proximity. This district also contains a small waterfront retail and dining area, making it a convenient location for residents and their guests.

Privacy within these large estates has been increased by the significant width of the water canals, which separate the custom home sites from the mainland. Land access to the district is provided through a small, gated bridge, adding further to the privacy enjoyed by residents of the Waterfront Villas.

- The Kingdom’s most luxurious villa residences
- Secluded estates with their own private boat docks
- Unrivalled levels of privacy

Education Zone
A beacon for those in search of knowledge

The Education Zone in King Abdullah Economic City will bring together the best educational programs and facilities. State-of-the-art schools and universities will provide education for all levels, reputed colleges will help students pursue their dreams, and educational centres will provide specialised courses. A fully equipped research centre will help nurture the talent of young Saudis and harness their potential to propel the Saudi economy.

- Schools for all educational levels
- International universities for higher education
- Developing local talent

11.5.3 Implications for Red Sea Coast

A scheme of this scale, if fully completed as set out, would be expected to create around 500,000 jobs, which would certainly make a massive contribution to National and regional economic objectives. It is understood that in order to assemble the political and financial support for such a large scheme, and to secure the necessary land assembly, there has been a considerable degree of secrecy prior to its announcement in December 2005.

Issues that now need to be addressed in the context of the approach to development along the Red Sea that are emerging from this study, include:

- Its compatibility with current regional development policy such as the National Urban Strategy and more local plans such as the new Urban Strategy for Jeddah;
- The nature of any strategic environmental assessment that has been undertaken;
- The impact on proposed environmental protection areas within the locality of the KAEC

The National Urban Strategy, approved in 1421H supported the need to strengthen the economic importance of existing urban centres, notably Jeddah, while the Urban Development Strategy for the Makkah Province sought to restrict urban expansion in favour of a higher density of development within the existing city boundaries.

With regards the tourism implications of the KAEC, the impact would be considerable, with the proposed 5,000 rooms representing an additional 30% to current stock. The issues that need to be investigated include:

- What have been the market assumptions made by the developers for the tourist facilities, i.e. are they aimed to domestic or international markets?
- What will the impact be on other current proposals and for the completion of existing project such as Durrat al Arous?
- How will potential conflicts between proposals in this Strategy and the KAEC be resolved?
Action Plan

12.1 Introduction

The following Action Plan is the key output of the Red Sea Tourism Strategy in that it:

- sets out a co-ordinated work programme for the next five years;
- identifies the priorities and timetable for action within that period;
- identifies the agencies that will be involved in implementing specific actions, whether in lead or supporting roles; and
- provides an outline indication of the likely budget implications.

In addition it is the means by which progress in the implementation of the strategy can be monitored. The sectors that are covered in the Action Plan are:

1. Institutional
2. Policy Framework
3. Product Development
4. Marketing
5. Human Resource Development
6. Monitoring and Review

The timescale for the implementation of the Action Plan assumes that Year One is mid 2006.

The key issues that it addresses are:

- The need to establish interim administrative arrangements ahead of the full establishment of the Red Sea Tourism Task Force.
- That these initiate the close co-operation between the SCT and the Provincial authorities and tourism stakeholders and reflect the continuing importance of the public/private sector partnership.
- The close involvement of all the key enablers within the Province and Kingdom, particularly the private sector.

The budgetary implications of the Plan are summarised in the table as:

NR  No Requirements beyond base budget
AR (P)  Additional Funds required – Province Led
AR (N)  Additional Funds required – National led
AR (C)  Additional Funds required Commercial

<table>
<thead>
<tr>
<th>No.</th>
<th>Project/Action</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Lead Role</th>
<th>Other Partners</th>
<th>Budget Impact</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Establish Red Sea Tourism Coordinating Committee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.1</td>
<td>Liaise with stakeholders involved in Red Sea Project</td>
<td>Q1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SCT</td>
<td>All Stakeholder involved in Report Preparation</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>1.1.2</td>
<td>Initiate a Red Sea Tourism Coordinating Committee</td>
<td>Q2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SCT</td>
<td>All Stakeholder involved in Report Preparation</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>1.2</td>
<td>Establish Red Sea Tourism Task Force (RSTTF)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2.1</td>
<td>Draft Business Plan for the RSTTF</td>
<td>Q2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SCT</td>
<td>PTOs</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>1.2.2</td>
<td>Appoint or Second staff</td>
<td>Q2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SCT</td>
<td></td>
<td>AR (N) or NR</td>
<td></td>
</tr>
<tr>
<td>1.2.3</td>
<td>Allocation of Budget</td>
<td>Q3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SCT</td>
<td>All Stakeholders</td>
<td>AR (N)</td>
<td></td>
</tr>
<tr>
<td>1.2.4</td>
<td>Preparation of Red Sea Tourism Development Programme (RSTDP)</td>
<td>Q4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SCT</td>
<td>All Stakeholders</td>
<td>NR</td>
<td></td>
</tr>
</tbody>
</table>
### 12. Action Plan

<table>
<thead>
<tr>
<th>No.</th>
<th>Project/Action</th>
<th>Year</th>
<th>Lead Role</th>
<th>Other Partners</th>
<th>Budget Impact</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td><strong>POLICY FRAMEWORK</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1</td>
<td><strong>Tourism Policy</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1.1</td>
<td>Secure approval for Strategic Environment Assessment (SEA) for RSTDP</td>
<td>Q3</td>
<td>SCT</td>
<td></td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>2.1.2</td>
<td>Prepare ToR for SEA</td>
<td>Q4</td>
<td>RSTTF</td>
<td></td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>2.1.3</td>
<td>Initiate SEA</td>
<td></td>
<td>RSTTF</td>
<td></td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>2.1.4</td>
<td>Confirm SCT’s role in management for tourism sites</td>
<td>Q3</td>
<td>SCT</td>
<td></td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>2.1.5</td>
<td>Prepare Brief for a Resort Master Plan for Sharm Yanbu</td>
<td>Q4</td>
<td>xxx</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1.6</td>
<td>Prepare Resort Master Plan for Sharm Yanbu</td>
<td></td>
<td>RSTTF</td>
<td></td>
<td>AR (N)</td>
<td></td>
</tr>
<tr>
<td>2.2</td>
<td><strong>Conservation Policy</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.2.1</td>
<td>Review tourism implications of MoMRA Coastal Zone Plan</td>
<td>Q4</td>
<td>RSTTF</td>
<td></td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>2.2.2</td>
<td>Confirm Environmental Impact Assessments (EIAs) for all tourism development</td>
<td>Q4</td>
<td>SCT</td>
<td></td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>2.2.3</td>
<td>Prepare Brief for new Farasan Islands Protected Area Management Plan</td>
<td>Q4</td>
<td>RSTTF</td>
<td>NCWCD</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>2.2.4</td>
<td>Prepare Farasa Islands PAMP</td>
<td>xxx</td>
<td>RSTTF</td>
<td>NCWCD</td>
<td>AR (N)</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>Project/Action</td>
<td>Year</td>
<td>Lead Role</td>
<td>Other Partners</td>
<td>Budget Impact</td>
<td>Remarks</td>
</tr>
<tr>
<td>-----</td>
<td>--------------------------------------------</td>
<td>------</td>
<td>-----------</td>
<td>----------------</td>
<td>---------------</td>
<td>---------</td>
</tr>
<tr>
<td>3.1</td>
<td>General Product Development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1.1</td>
<td>Prepare Development Portfolio of Tourism Opportunities</td>
<td>Q4</td>
<td>xxx</td>
<td>RSTTF PTOs</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>3.1.2</td>
<td>Circulate and Promote Portfolio</td>
<td>xxx</td>
<td>RSTTF</td>
<td>PTOs</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>3.1.3</td>
<td>Prepare GIS Database of Development Site</td>
<td>xxx</td>
<td>RSTTF</td>
<td>PTOs</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>3.2</td>
<td>Resorts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2.1</td>
<td>Liaise with owners of Dururat Al Arrous regarding new masterplan for Phase 2 site</td>
<td></td>
<td>RSTTF Commercial Sector</td>
<td>NR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2.2</td>
<td>Produce and circulate Design Guidelines for Resort Development</td>
<td></td>
<td>RSTTF Commercial Sector</td>
<td>AR (N)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2.3</td>
<td>Liaise with owners of Al Buhairat regarding completion of project</td>
<td></td>
<td>RSTTF Commercial Sector</td>
<td>NR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3</td>
<td>Attractions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3.1</td>
<td>Prepare Brief for Feasibility Study for Jeddah Aquarium</td>
<td>Q4</td>
<td>RSTTF</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3.2</td>
<td>Commission Study for Aquarium</td>
<td>xxx</td>
<td>RSTTF</td>
<td>AR (N)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3.3</td>
<td>Prepare Brief for Feasibility study for Jeddah Maritime Museum</td>
<td>xxx</td>
<td>RSTTF</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3.4</td>
<td>Commission Study for Aviation Museum</td>
<td>xxx</td>
<td>RSTTF</td>
<td>AR (N)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3.5</td>
<td>Prepare Brief for Feasibility Study for Jeddah Aviation Museum</td>
<td>xxx</td>
<td>RSTTF</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3.6</td>
<td>Commission Study for Aviation Museum</td>
<td>xxx</td>
<td>RSTTF</td>
<td>AR (N)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4</td>
<td>Heritage Tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4.1</td>
<td>Prepare Brief for Feasibility Study for Old Jeddah Heritage Centre/Visitor Centre</td>
<td>Q4</td>
<td>RSTTF Jeddah Municipality, Makkah PTO</td>
<td>NR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4.2</td>
<td>Commission study for Heritage Centre</td>
<td>xxx</td>
<td>RSTTF</td>
<td>AR (N/P)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4.3</td>
<td>Prepare Brief for Feasibility study for Badr Battlefield</td>
<td>xxx</td>
<td>RSTTF Jeddah Municipality, Makkah PTO</td>
<td>NR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4.4</td>
<td>Commission Study for Battlefield</td>
<td>xxx</td>
<td>RSTTF</td>
<td>Madinah Province, &amp; PTO</td>
<td>AR (N/P)</td>
<td></td>
</tr>
<tr>
<td>3.4.5</td>
<td>Prepare Brief for Farasan Town Heritage Centre Feasibility Study</td>
<td>xxx</td>
<td>RSTTF</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4.6</td>
<td>Commission Study for Farasan Heritage Centre</td>
<td>xxx</td>
<td>RSTTF Madinah Province, &amp; PTO</td>
<td>AR (N/P)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4.7</td>
<td>Prepare Brief for Muwallah Fort, Bubia Feasibility Study</td>
<td>xxx</td>
<td>RSTTF Tabuh Province &amp; PTO</td>
<td>NR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4.8</td>
<td>Commission Study for Muwallah Fort</td>
<td>xxx</td>
<td>RSTTF</td>
<td>Tabuh Province &amp; PTO</td>
<td>AR (N/P)</td>
<td></td>
</tr>
<tr>
<td>3.5</td>
<td>Conservation Tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.5.1</td>
<td>Prepare Brief for Maray As SarrajVisitor Centre Feasibility Study</td>
<td>Q4</td>
<td>RSTTF NLWCD, Makkah PTO</td>
<td>NR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.5.2</td>
<td>Commission Study for Visitor Centre</td>
<td>xxx</td>
<td>RSTTF</td>
<td>NLWCD, Makkah PTO</td>
<td>AR(N)</td>
<td></td>
</tr>
<tr>
<td>3.6</td>
<td>Eco Tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.6.1</td>
<td>Prepare Brief for Tabuk MountainsVisitor Centre Feasibility Study</td>
<td>xxx</td>
<td>RSTTF Tabuk Province + PTO</td>
<td>NR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.6.2</td>
<td>Commission Study for Visitor Centre</td>
<td>xxx</td>
<td>RSTTF</td>
<td>AR(N)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.7</td>
<td>Events</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.7.1</td>
<td>Liaise with event organisers and sports bodies in Jeddah</td>
<td>Q4</td>
<td>RSTTF Jeddah Chamber of Commerce</td>
<td>NR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.7.2</td>
<td>Prepare Sport Events Programme</td>
<td>xxx</td>
<td>RSTTF</td>
<td>Jeddah Chamber of Commerce</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>3.8</td>
<td>Support Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.8.1</td>
<td>Liaise with PTOs on programme of T/L Provision</td>
<td>Q3</td>
<td>RSTTF PTOs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.9</td>
<td>Infrastructure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>Project/Action</td>
<td>Year</td>
<td>Lead Role</td>
<td>Other Partners</td>
<td>Budget Impact</td>
<td>Remarks</td>
</tr>
<tr>
<td>-----</td>
<td>-----------------------------------------------------</td>
<td>------</td>
<td>-----------</td>
<td>----------------</td>
<td>---------------</td>
<td>---------</td>
</tr>
<tr>
<td>4.</td>
<td>MARKETING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1</td>
<td>Review coverage of Red Sea in existing SCT Marketing Programme</td>
<td>Q3</td>
<td>RSTTF</td>
<td>SCT</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>4.2</td>
<td>Prepare Red Sea Marketing Programme</td>
<td>Q4</td>
<td>RSTTF</td>
<td>SCT</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>4.3</td>
<td>Marketing Material</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.3.1</td>
<td>Review photographic library material</td>
<td>Q4</td>
<td>RSTTF</td>
<td>SCT, PTOs</td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>4.3.2</td>
<td>Initiate Branding exercise</td>
<td>xxx</td>
<td>RSTTF</td>
<td>SCT, PTOs</td>
<td>AR(N/P)</td>
<td></td>
</tr>
<tr>
<td>4.3.3</td>
<td>Prepare new maps and guides</td>
<td>xxx</td>
<td>RSTTF</td>
<td>PTOs</td>
<td>AR (N/P)</td>
<td></td>
</tr>
<tr>
<td>4.3.4</td>
<td>Develop Web Site</td>
<td>xxx</td>
<td>RSTTF</td>
<td>PTOs</td>
<td>AR(N/P)</td>
<td></td>
</tr>
<tr>
<td>4.4</td>
<td>Marketing Campaign</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4.1</td>
<td>Initiate IR Campaign</td>
<td>xxx</td>
<td>RSTTF</td>
<td>PTOs</td>
<td>AR(N/P)</td>
<td></td>
</tr>
<tr>
<td>4.4.2</td>
<td>Initiate Marketing Programme</td>
<td>xx</td>
<td>xxx</td>
<td>xxx</td>
<td>xxx</td>
<td>RSTTF</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No.</th>
<th>Project/Action</th>
<th>Year</th>
<th>Lead Role</th>
<th>Other Partners</th>
<th>Budget Impact</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>HUMAN RESOURCE DEVELOPMENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1</td>
<td>Tourism/Conservation Awareness</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1.1</td>
<td>Liaise with PTOs over tourism awareness programme</td>
<td>xxx</td>
<td>xxx</td>
<td>xxx</td>
<td>xxx</td>
<td>RSTTF</td>
</tr>
<tr>
<td>5.1.2</td>
<td>Initiate Red Sea Conservation Awareness Programme</td>
<td>xxx</td>
<td>RSTTF</td>
<td>PTOs, NCWCD, PERSGA</td>
<td>AR(N/P)</td>
<td></td>
</tr>
<tr>
<td>5.2</td>
<td>Tourism Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.2.1</td>
<td>Liaise with PTOs over tourism training programme</td>
<td>xxx</td>
<td>RSTTF</td>
<td>PTOs</td>
<td>NR</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No.</th>
<th>Project/Action</th>
<th>Year</th>
<th>Lead Role</th>
<th>Other Partners</th>
<th>Budget Impact</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>MONITORING AND REVIEW</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.1</td>
<td>Research/Monitoring</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.1.1</td>
<td>Work with SCT (MAS) to build up tourism database</td>
<td>Q3/Q4</td>
<td>xxx</td>
<td>RSTTF</td>
<td>SCT (MAS), PTOs</td>
<td>NR</td>
</tr>
<tr>
<td>6.1.2</td>
<td>Establish benchmarking data for RSTDP &amp; SEA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.1.3</td>
<td>Collect and Analyse monitoring data</td>
<td>xxx</td>
<td>xxx</td>
<td>xxx</td>
<td>xxx</td>
<td>RSTTF</td>
</tr>
<tr>
<td>6.2</td>
<td>Review</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.2.1</td>
<td>Undertake Year One Review and revise Action Plan</td>
<td>xxx</td>
<td>RSTTF</td>
<td></td>
<td>NR</td>
<td></td>
</tr>
<tr>
<td>6.2.2</td>
<td>Undertake independent Mid Term Review</td>
<td>xxx</td>
<td>RSTTF</td>
<td></td>
<td>AR(N)</td>
<td></td>
</tr>
</tbody>
</table>
13.1 Introduction

The main reason for the Kingdom’s increased involvement in tourism is for the economic benefits that it can bring, and in particular, the employment for Saudi Arabia’s fast growing population.

This study has attempted to set out the potential scale and nature of future tourism development along the Red Sea, within the identified carrying capacity of such a sensitive environmental area.

Although the eventual form of such development will naturally vary in some detail from what is suggested at this early stage, but it is still possible to calculate it’s overall impact in terms of economic and financial benefits and employment creation. Such calculations are necessary at this stage in assessing the balance of benefits against the costs of providing the necessary expenditure on infrastructure, additional to that that is already being proposed.

The next section of this chapter sets out the assumptions lying behind the calculations of the economic and employment benefits arising from the first five years of the Programme, subsequent sections calculate the economic input of this scale of development. These are presented zone by zone and cover the first five years of the development programme. Appendix D sets out the potential development over the next 15 years up to 2020.

13.2 Detailed Development Programme 2006-2010

<table>
<thead>
<tr>
<th>ZONE 1 JEDDAH</th>
<th>DEVELOPMENT HOTELS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PHASE 1: 2006 – 2010</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Year</strong></td>
<td><strong>Type</strong></td>
</tr>
<tr>
<td>1.</td>
<td>Business Resort</td>
</tr>
<tr>
<td>2.</td>
<td>Business Resort Heritage</td>
</tr>
<tr>
<td>3.</td>
<td>Business Resort Heritage</td>
</tr>
<tr>
<td>4.</td>
<td>Business Resort</td>
</tr>
<tr>
<td>5.</td>
<td>Business Resort</td>
</tr>
</tbody>
</table>
### 13. Economic Impact

**ZONE 1 JEDDAH**

**DEVELOPMENT: MAJOR RESORTS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Durrat Al Arrous Al Buhairat</td>
<td>1</td>
<td>100 villas/apts</td>
<td>40%</td>
<td>10M SR for redredging and relandscaping of Phase II</td>
<td>50M SR</td>
<td>200 (Construction) 200</td>
</tr>
<tr>
<td>2.</td>
<td>Durrat Al Arrous Thuwal Al Buhairat</td>
<td>2</td>
<td>200 villas/apts</td>
<td>40%</td>
<td>100M SR</td>
<td>50M SR</td>
<td>400 (Construction) 200</td>
</tr>
<tr>
<td>3.</td>
<td>Durrat Al Arrous Al Buhairat</td>
<td>3</td>
<td>200 villas/apts</td>
<td>40%</td>
<td>100M SR</td>
<td>50M SR</td>
<td>400 (Construction) 200</td>
</tr>
<tr>
<td>4.</td>
<td>Durrat Al Arrous Shuaba Al Buhairat</td>
<td>4</td>
<td>200 villas/apts</td>
<td>40%</td>
<td>100M SR</td>
<td>50M SR</td>
<td>400 (Construction) 200</td>
</tr>
<tr>
<td>5.</td>
<td>Durrat Al Arrous Al Buhairat</td>
<td>5</td>
<td>200 villas/apts</td>
<td>40%</td>
<td>100M SR</td>
<td>50M SR</td>
<td>400 (Construction) 200</td>
</tr>
</tbody>
</table>

**DEVELOPMENT: ATTRACTIONS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Aquarium</td>
<td>1</td>
<td>Major Iconic building</td>
<td>Capacity for 250,000 visitors per year</td>
<td>5M SR for Feasibility &amp; Design Studies</td>
<td>Free</td>
<td>40 (Construction)</td>
</tr>
<tr>
<td></td>
<td>Ship Reconstruction</td>
<td>2</td>
<td>Historic style allows location near old Jeddah</td>
<td>Capacity for 50,000 visitors per year</td>
<td>1 million SR each</td>
<td>10 SR per Adult</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Old Jeddah Heritage Centre</td>
<td>1</td>
<td>Conversion of historic building</td>
<td></td>
<td>0.5M SR for Feasibility/Design Study</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rabigh Visitor Centre</td>
<td>1</td>
<td>Modern visitor centre</td>
<td></td>
<td>0.5M SR for Feasibility/Design Study</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Aquarium Maritime Museum</td>
<td>1</td>
<td>Major Iconic building</td>
<td>Capacity for 100,000 visitors per year</td>
<td>20MSR for Detailed Design</td>
<td>Free</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Old Jeddah Heritage Centre</td>
<td>1</td>
<td></td>
<td></td>
<td>3M SR for Feasibility/Design Study</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rabigh Visitor Centre</td>
<td>1</td>
<td></td>
<td></td>
<td>30M SR Construction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Aquarium Aviation Museum</td>
<td>1</td>
<td>240M SR Construction</td>
<td>15 SR per Adult</td>
<td>400 (Construction) 200 (Operation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Maritime Museum</td>
<td>1</td>
<td>120M SR Construction</td>
<td>10 SR per Adult</td>
<td>200 (Construction) 100 (Operation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Aviation Museum</td>
<td>1</td>
<td>100M SR Construction</td>
<td>10 SR per Adult</td>
<td>200 (Construction) 100 (Operation)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### ZONE 1: JEDDAH
**DEVELOPMENT: SUPPORT FACILITIES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Old Jeddah Tourist Information Centre</td>
<td>1</td>
<td>Conversion of Historic Property</td>
<td>Capacity for 200,000 visitors p.a.</td>
<td>5M SR inc. fit out</td>
<td>Free</td>
<td>20 (Construction) 10 (Operation)</td>
</tr>
<tr>
<td>2.</td>
<td>Airport Tourist Information Centre</td>
<td>1</td>
<td>Installation with Terminal Buildings</td>
<td>Capacity for 200,000 visitors p.a.</td>
<td>1M SR inc. fit out</td>
<td>Free</td>
<td>10 (Construction) 5 (Operation)</td>
</tr>
<tr>
<td>3.</td>
<td>North Corniche Tourist Information Centre</td>
<td>1</td>
<td>Kiosk type building</td>
<td>Capacity for 200,000 visitors p.a.</td>
<td>2M SR inc. fit out</td>
<td>Free</td>
<td>20 (Construction) 5 (Operation)</td>
</tr>
</tbody>
</table>

### ZONE 2: YANBU
**DEVELOPMENT: RESORTS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Major Resort on Yanbu</td>
<td>1</td>
<td>400 villas 2/3 hotels Marina Recreational Facilities</td>
<td>50%</td>
<td>1.500M SR</td>
<td>1,000</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Major Resort on Yanbu</td>
<td>1</td>
<td>400 villas 2/3 hotels Marina Recreational Facilities</td>
<td>50%</td>
<td>1.500M SR</td>
<td>1,000</td>
<td></td>
</tr>
</tbody>
</table>

### ZONE 2: YANBU
**DEVELOPMENT: HOTELS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Business Resort 1</td>
<td>1</td>
<td>100 rooms 3/4 star</td>
<td>60%</td>
<td>30M SR</td>
<td>100 SR per night</td>
<td>120 jobs</td>
</tr>
<tr>
<td>2.</td>
<td>Business Resort Heritage</td>
<td>1</td>
<td>100 rooms 3/4 star</td>
<td>60%</td>
<td>30M SR</td>
<td>400 SR per night</td>
<td>120 jobs</td>
</tr>
<tr>
<td>3.</td>
<td>Business Resort EcoLodge</td>
<td>1</td>
<td>100 rooms 3/4 star</td>
<td>60%</td>
<td>30M SR</td>
<td>600 SR per night</td>
<td>120 jobs</td>
</tr>
<tr>
<td>4.</td>
<td>Business Resort EcoLodge</td>
<td>1</td>
<td>100 rooms 3/4 star</td>
<td>60%</td>
<td>30M SR</td>
<td>800 SR per night</td>
<td>120 jobs</td>
</tr>
<tr>
<td>5.</td>
<td>Business Resort 1</td>
<td>1</td>
<td>100 rooms 3/4 star</td>
<td>60%</td>
<td>30M SR</td>
<td>1,000 SR per night</td>
<td>120 jobs</td>
</tr>
</tbody>
</table>
## 13. Economic Impact

**ZONE: 2**
**DEVELOPMENT: ATTRACTIONS/ACTIVITIES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Dive Centre/Marina Badr Battlefield</td>
<td>1</td>
<td>40 boat/40 diver capacity on Sharm Yanbu Modern visitor centre</td>
<td>Capacity for 100,000 visitors p.a.</td>
<td>20M SR</td>
<td>0.3M SR for Feasibility and Design Study</td>
<td>120 Jobs</td>
</tr>
<tr>
<td>2.</td>
<td>Badr Battlefield Visitor Centre</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>10M SR Construction</td>
<td>100 Jobs (Construction) 15 Jobs (Operation)</td>
</tr>
<tr>
<td>3.</td>
<td>Heritage Centre Old Yanbu</td>
<td>1</td>
<td>Conversion of historic property</td>
<td>Capacity for 50,000 visitors p.a.</td>
<td>0.3M for Feasibility &amp; Design Study</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Heritage Centre Old Yanbu</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>5M SR for Conversion 10 SR per Adult</td>
<td>10 Jobs (Operation)</td>
</tr>
<tr>
<td>5.</td>
<td>Nakhil Village restoration</td>
<td>1</td>
<td>Conversion of historic properties</td>
<td>Capacity for 40,000 visitors</td>
<td>0.3M for Feasibility &amp; Design Study</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ZONE: 3**
**DEVELOPMENT: HOTELS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Dive Hotel Resort Hotel</td>
<td>1</td>
<td>40 room 5 star 50 room 4/5 star</td>
<td>65% 65%</td>
<td>15M SR 20M SR</td>
<td>1000 SR per night 800 SR per night</td>
<td>100 Jobs 100 Jobs</td>
</tr>
<tr>
<td>2.</td>
<td>Dive Hotel Resort Hotel</td>
<td>1</td>
<td>40 room 3/4 star 50 room 3/4 star</td>
<td>65% 65%</td>
<td>10M SR 15M SR</td>
<td>600 SR per night 400 SR per night</td>
<td>80 Jobs 80 Jobs</td>
</tr>
<tr>
<td>3.</td>
<td>Dive Hotel Resort Hotel</td>
<td>1</td>
<td>40 room 5 star 50 room 4/5 star</td>
<td>65% 65%</td>
<td>15M SR 20M SR</td>
<td>1000 SR per night 800 SR per night</td>
<td>100 Jobs 100 Jobs</td>
</tr>
<tr>
<td>4.</td>
<td>Dive Hotel Resort Hotel</td>
<td>1</td>
<td>40 room 3/4 star 50 room 3/4 star</td>
<td>65% 65%</td>
<td>10M SR 15M SR</td>
<td>600 SR per night 400 SR per night</td>
<td>80 Jobs 80 Jobs</td>
</tr>
</tbody>
</table>

**ZONE: 3**
**DEVELOPMENT: ATTRACTIONS/SUPPORT FACILITIES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Farasan Town Heritage/Visitor Centre</td>
<td>1</td>
<td>Conversion of historic property in Old Farasan</td>
<td>Capacity for 10,000 visitors per year</td>
<td>1M SR</td>
<td>10 SR Adult</td>
<td>10 Jobs</td>
</tr>
<tr>
<td>2.</td>
<td>Park Centre</td>
<td>1</td>
<td>Modern building</td>
<td>Capacity for 10,000 visitors per year</td>
<td>4M SR</td>
<td>10 SR Adult</td>
<td>10 Jobs</td>
</tr>
</tbody>
</table>

3.
4.
5.
### PHASE 1: 2006 – 2010

#### ZONE 4: JIZAN

**DEVELOPMENT: HOTELS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/ Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/ Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Resort Hotel</td>
<td>1</td>
<td>50-100 rooms</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3/4 star</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Resort Hotel</td>
<td>1</td>
<td>50-100 rooms</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3/4 star</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Resort Hotel</td>
<td>1</td>
<td>50-100 rooms</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3/4 star</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### ZONE 4: JIZAN

**DEVELOPMENT: ATTRACTIONS/SUPPORT FACILITIES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/ Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/ Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jizan Tourist Information Centre</td>
<td>1</td>
<td>Capacity for 50,000 visitors p.a.</td>
<td>Free</td>
<td>2M SR</td>
<td>Free</td>
<td>10 Jobs</td>
</tr>
<tr>
<td>2</td>
<td>Turkish Fort</td>
<td></td>
<td></td>
<td></td>
<td>0.3M SR</td>
<td>Feasibility study into reuse of Fort</td>
<td></td>
</tr>
</tbody>
</table>

#### ZONE 5: TABUK

**DEVELOPMENT: HOTELS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/ Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/ Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Resort Heritage</td>
<td>1</td>
<td>50 rooms 3/4 star</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Conversion of Muwallah Fort 40 rooms 4/5 star</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Resort Heritage</td>
<td>1</td>
<td>50 rooms 3/4 star</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>20 rooms 3/4 star</td>
<td>65%</td>
<td>15M SR</td>
<td>500 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td>3</td>
<td>Resort Heritage</td>
<td>1</td>
<td>50 rooms 3/4 star</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>20 rooms 3/4 star</td>
<td>65%</td>
<td>10M SR</td>
<td>500 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td>4</td>
<td>Resort</td>
<td>1</td>
<td>50 rooms 3/4 star</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td>5</td>
<td>Resort</td>
<td>1</td>
<td>50 rooms 3/4 star</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
</tbody>
</table>
### 13. Economic Impact

#### PHASE 1: 2006 – 2010

**ZONE 5: TABUK**

**DEVELOPMENT: ATTRACTIONS/SUPPORT FACILITIES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>No.</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Mountain Visitor Centre</td>
<td>1</td>
<td>Near building with view point</td>
<td>Capacity for 100,000 visitors p.a.</td>
<td>5M SR</td>
<td>10 SR Adult</td>
<td>20 Jobs</td>
</tr>
<tr>
<td>2.</td>
<td>Tourist Information Centre, Daba</td>
<td>1</td>
<td>Conversion of historic building by harbour</td>
<td>Capacity for 100,000 visitors p.a.</td>
<td>2M SR</td>
<td>Free</td>
<td>10 Jobs</td>
</tr>
</tbody>
</table>

#### PHASE 1: 2006 – 2010

**ZONE 6: S. MAKKAH ASIR**

**DEVELOPMENT: HOTELS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>Number</th>
<th>Size/Grade</th>
<th>Occupancy/Admissions</th>
<th>Capital Cost (SR Million)</th>
<th>Room Rate/Admission Price</th>
<th>Job Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Resort Hotel</td>
<td>1</td>
<td>50 rooms 3/4 star</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td>2.</td>
<td>Resort Hotel</td>
<td>1</td>
<td>50 rooms 3/4 star</td>
<td>50%</td>
<td>20M SR</td>
<td>400 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td>3.</td>
<td>Resort Hotel</td>
<td>1</td>
<td>50 rooms 3/4 star</td>
<td>50%</td>
<td>20M SR</td>
<td>600 SR per night</td>
<td>80 Jobs</td>
</tr>
<tr>
<td>4.</td>
<td>Dive Hotel</td>
<td>1</td>
<td>40 rooms 3/4 star</td>
<td>65%</td>
<td>30M SR</td>
<td>500 SR per night</td>
<td>80 Jobs</td>
</tr>
</tbody>
</table>

5.
13.3 The Process of Economic Impact Assessment

An assessment of the economic impact of the Red Sea Tourism Strategy requires the measurement of the incremental contribution made to the economy by the investment programme identified to support and deliver that strategy. This is represented by the additional economic value generated over and above existing levels of visitor arrivals and their expenditure. At its simplest, this can be calculated by multiplying projected additional visitor arrivals by assumed levels of daily expenditure by market sector and by conducting other analyses to identify the associated employment created and foreign exchange earned etc.

In this particular instance, the Strategy has neither prepared nor followed a prescriptive approach based upon visitor arrival targets by market sector and thus the economic analysis cannot use such a basis for its own calculations. The incremental economic impact must therefore take its lead from the preparation of estimates of the operational performance of the proposed programme of investment in hotels, resorts, attractions and support facilities identified. These estimates are then used as building blocks, together with the utilisation of several expenditure and multiplier indicators prepared by the economists working on the Sustainable Tourism Development Plan for Saudi Arabia, for the calculation of the various measures of economic impact outlined below.

The estimates of economic impact presented below relate only to the components of the recommended Five Year Action Plan covering the period 2006-2010, as required by the Terms of Reference. A detailed presentation of this Action Plan, described as the Phase I Development Programme, broken down by geographic zone, development type and specification, capital cost, employment created and construction timing, may be found in a dedicated appendix within the Appendices section of the main report.

Tourism Expenditure

Estimates of tourism expenditure generated by the Development Programme are made utilising statistical data and survey findings covering the hotel sector and inbound/domestic visitor spending patterns. Assumptions have been made about the numbers of rooms proposed for the range of hotels, apartments and villas planned, while appropriate levels of occupancy and suitable room rates have been adopted. Additional expenditure in the hotels is identified using accepted percentage relationships between rooms revenue and other departmental revenues in the Saudi hotel industry while visitor spending on recreation, transport, shopping and other non-accommodation items is derived from MAS Centre Visitor Expenditure Survey results.

Assumptions have also been made concerning the visitor numbers, entrance charges and additional spend attributable to the operation of the various visitor attractions and heritage centres proposed.

Expenditure associated with the implementation of the Five Year Development Programme itself that is the private sector investment in hotels, resorts and attractions, together with the public sector investment in relevant infrastructure, is also included.

Foreign Exchange Earnings

The proposed Red Sea Development Programme of accommodation, resorts and visitor attractions will be patronised by both domestic and overseas tourists and thus a proportion of the tourism expenditure generated can be characterised as foreign exchange earned for the national economy. This can be presented in gross and net terms since the operation of the tourism facilities utilised by both overseas and domestic tourists will require the importation of goods and services whose foreign exchange costs should be offset against the gross foreign exchange earnings.

The calculation of estimated tourism expenditure considers both the inbound and domestic visitor sectors and through the use of MAS Centre survey results covering visitor nights and spend, estimates can be made of the split of this expenditure between the sectors.

Research undertaken in the course of preparing the Sustainable Tourism Development Plan has estimated the level of import content in total tourism final demand (tourism expenditure) and thus an estimate of this leakage can be deducted from the foreign exchange earnings to provide an indicative net figure.

Employment Income

This is the remuneration received in wages and salaries by those in the tourism sector and suppliers to the sector and once again the research conducted for the Sustainable Tourism Development Plan has estimated the percentage of total sales income (tourism expenditure) attributable, nationally, to this item and
this percentage approach is adopted here to identify this benefit from the Red Sea Tourism Strategy.

Tourism GDP / Value Added

At present, only indicative estimates can be made of the Tourism Gross Domestic Product (GDP), since this measure of total output within the sector (based upon total expenditure figures) requires to be adjusted to remove the possible double counting of expenditure within the chain of output between suppliers and final retailers.

Research studies conducted by the MAS Centre are on-going with respect to the development of a Tourism Satellite Account which once in place will provide a detailed data base from which an accurate measurement of consumption within the tourism sector and thus the identification of its contribution to the national economy can be made. Currently, the adjustment to total output can only be made utilising norms established from international experience of this measure until an accurate picture emerges of the intermediate consumption (the value contribution of a supplier input to the sale price adopted by the final retailer of a given tourism product or service) within the sector through the introduction of the Tourism Satellite Account. Such norms have already been adopted by the MAS Centre when estimating Tourism GDP /Value Added and are consequently adopted here.

Employment

Assumptions about direct employment creation associated with the individual investment projects have been made but they exclude temporary employment created within the construction industry in the course of building the hotels, attractions and relevant infrastructure.

Multiplier Effect

The figures which result from the calculations undertaken in the tourism expenditure, employment income, GDP/Value Added and employment sections above represent the direct economic effects in each of those categories i.e. the estimated level of actual expenditure of the inbound and domestic visitors, the incomes received by those employed in the tourist businesses (and their suppliers) responsible for providing the accommodation, food, transport and recreation to the visitors, the GDP/Value Added associated with those figures and the direct employment created by the investment projects. However, the economic benefits of a given tranche of expenditure do not finish at this direct or first round of economic effect. The recipients of this initial expenditure, the hotels and other tourism sector businesses, pay their employees and suppliers from these proceeds and these recipients then in turn spend a proportion of this income in a variety of ways. This secondary round of expenditure comprises the indirect and induced effects of the original expenditure and it also results in further successive rounds of diminishing levels of spending and economic effect. This overall process is known as the multiplier effect, whose initial impacts are significant and more readily measurable and whose subsequent diminishing impacts are more difficult to capture.

13.3 Tourism Expenditure

Tourism expenditure is the principal economic indicator from which most other economic impact measures flow and thus calculation of this factor is fundamental to any examination of economic impact aspects.

The basis for estimating this expenditure, as has been noted in Section 1 above, is to be found in the scale of the public and private financial investment required by the Programme and in the operational performance of that investment, in the hotels, resorts and visitor attractions which comprise the Phase 1 Development Programme. This Programme, in summary, comprises the construction of some 6440 hotel rooms of between three and five star standard, the building of 5 major resort complexes, 4 major visitor attractions and 14 heritage /information centres together with relevant supporting infrastructure.

A detailed picture of the nature, scale and distribution of the various components of the Programme is to be found in the specialist appendix in the Appendices section of the main report but in broad terms, the weighting of investment in the first phase of this Strategy focuses on the Jeddah and Yanbu areas because of their available infrastructure provision, their proximity to and attractiveness for, existing markets. Thus the implementation of the first phase of the Strategy in terms of both the general provision of higher quality accommodation and recreation facilities and the opening of such facilities designed to attract niche markets, can be launched and tested more assuredly and with lower levels of financial risk in such more established locations than could be considered elsewhere.
The public and private sector costs of this Programme are also presented in the specialist appendix referred to above and they are summarised in Table 1 below.

| Table 13.1 Phase 1 Development Programme Investment – SR mills (2005 Values) |
|---|---|---|---|---|---|---|---|
| | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | Total Investment |
| Private Investment | 324 | 1194 | 1246 | 1731 | 1061 | 745 | 6301 |
| Public Investment | 166 | 166 | 166 | 166 | 0 | 830 | 7131 |
| Total Investment | 490 | 1360 | 1412 | 1897 | 1227 | 745 | 7131 |

Source: Red Sea Tourism Strategy – Phase 1 Development Programme

Summary of Assumptions

Hotel Size: Business and resort hotels have between 100 – 200 rooms each while niche hotels with an eco, heritage or dive market focus have 10 – 50 rooms.

Hotel Occupancy: Annual room occupancy levels are assumed to range from 50 – 70 per cent once the hotel has reached an established operating position. It is assumed that hotel occupancy will build over three years with the established position being reached in the third year of operation. The occupancy levels assumed for the individual hotels however, do vary according to the size, style and location of the hotel.

Hotel Room Rate: Room rates are assumed to range from 300 – 700 SR per room per night with individual rates again depending upon the standard, style and location of the hotel. A 10 per cent discount has then been deducted from these rates to take account of seasonality, midweek / weekend variations and other market factors. Room rates are held constant at current year (2005) values.

Hotel Guest Additional Spend In The Hotel: Hotel industry operating norms in Saudi Arabia indicate that rooms revenue represents approximately 50 per cent of total 4/5 star hotel revenues and some 45 per cent of 3 star hotel revenues thus the balance of hotel turnover from other sources (food and beverage for example) is roughly 50 – 55 per cent of turnover from the first year of operation.

Hotel Guest Additional Spend Outside The Hotel: The Inbound and Domestic daily visitor spending pattern on transportation, recreation, shopping and other discretionary items is derived from data published by the MAS Centre in their Quarterly Tourism Monitor.

Villas / Apts Size: The average villa / apartment is assumed to have three bedrooms.

Villas / Apts Occupancy: Annual weekly occupancy (rental is assumed to be on a weekly basis) is assumed to be between 40 - 50 per cent once the established operating position is reached. Occupancy is assumed to build over three operating years with 40 to 50 per cent being achieved, according to location, in the third operating year.

Villas / Apts Rental Rate: The average weekly rental rate is assumed to be 6000 SR. Rental rates are held constant at current year (2005) values.

Villas / Apts Occupancy Non-accommodation Spend: The Inbound and Domestic daily visitor spending pattern on food and beverage, transportation, recreation, shopping and other discretionary items is derived from data published by the MAS Centre in their Quarterly Tourism Monitor.

Major Visitor Attraction Visitor Numbers: These attractions are assumed to attract between 100 – 250,000 visitors per annum and it is also assumed that they will take three years to build visitor numbers to these particular levels.

Major Visitor Attraction Entrance Charges: It is assumed that these attractions will charge between 10 – 15 SR per person per visit and that these rates are held constant at current year (2005) values.

Major Visitor Attraction Additional Visitor Spend: It is assumed that an average of 60 per cent of visitors will spend an average of 50 per cent of their entrance charge on additional purchases at the attraction. This additional spend is also held constant at current (2005) values.

Dive Centre / Marina Occupancy: This facility has 40 boats which are assumed to carry an average of 10 divers a day for 50 per cent of the year. It is assumed that it takes three years to reach this ongoing level of dive boat utilisation.

Dive Centre / Marina Daily Rates: It is assumed that each diver pays an all-inclusive average daily rate of 250 SR for a days’ diving package and that this rate is held constant at current year (2005) values.

Heritage / Information Centres Visitor Numbers: These centres are assumed to attract between 50 – 100,000
visitors per annum depending upon their nature, style and location and it is also assumed that they will take three years to build visitor numbers to these levels.

Heritage / Information Centres Entrance Charges: It is assumed that these centres will charge on average between 10 – 15 SR per person per visit and that these rates are held constant at current year (2005) values.

Heritage / Information Centres Additional Visitor Spend: It is assumed that an average of 60 per cent of visitors will spend an average of 50 per cent of their entrance charge on additional purchases at the centre. This additional spend is also held constant at current (2005) values.

Construction Timeframes: It is assumed that hotel projects will take two years to construct while the major resorts with villas and apartments will take three years. Major attractions are assumed to take two years to build while smaller attractions and heritage centres take one year to construct.

The various room occupancy, visitor numbers, room rate / entrance and spend assumptions above are used to calculate gross turnover figures for the proposed investment projects while data from MAS Centre surveys provides statistics upon inbound and domestic visitor numbers, average lengths of stay, the percentage distribution between various types of accommodation provision used by these two sectors and their percentage expenditure patterns across several categories of spend, allowing projections of non-accommodation spend for overnight visitors to be made.

Table 1 below thus consolidates the range of expenditure figures calculated from the mix of investment projects proposed and presents them over the period 2006 – 2014 which enables hotel and attraction investment which commences construction in 2010, takes two years to build and takes a three further years to reach a stabilised operating position, to contribute fully to the picture of economic impact sought from this five year Phase 1 Development Programme. Table 2 thus demonstrates the build-up in annual tourism expenditure generated to 2014 when Phase 1 is complete and the ongoing position for this Programme is reached, realising some SR 3 billion annually at 2005 values.

<table>
<thead>
<tr>
<th>Year</th>
<th>Jeddah</th>
<th>Yanbu</th>
<th>Farasan</th>
<th>Jizan</th>
<th>Tabuk</th>
<th>Asir</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>1</td>
<td>18</td>
<td>61</td>
<td>24</td>
<td>14</td>
<td>12</td>
<td>16</td>
</tr>
<tr>
<td>2007</td>
<td>475</td>
<td>840</td>
<td>103</td>
<td>52</td>
<td>42</td>
<td>32</td>
<td>837</td>
</tr>
<tr>
<td>2009</td>
<td>840</td>
<td>1214</td>
<td>172</td>
<td>82</td>
<td>67</td>
<td>50</td>
<td>1656</td>
</tr>
<tr>
<td>2010</td>
<td>1214</td>
<td>1396</td>
<td>218</td>
<td>88</td>
<td>84</td>
<td>72</td>
<td>2271</td>
</tr>
<tr>
<td>2011</td>
<td>1396</td>
<td>1434</td>
<td>227</td>
<td>91</td>
<td>101</td>
<td>73</td>
<td>2881</td>
</tr>
<tr>
<td>2012</td>
<td>1434</td>
<td>1434</td>
<td>230</td>
<td>104</td>
<td>104</td>
<td>75</td>
<td>2879</td>
</tr>
<tr>
<td>2013</td>
<td>1434</td>
<td>1434</td>
<td></td>
<td></td>
<td></td>
<td>73</td>
<td>2879</td>
</tr>
<tr>
<td>2014</td>
<td>1434</td>
<td>1434</td>
<td></td>
<td></td>
<td></td>
<td>73</td>
<td>3021</td>
</tr>
</tbody>
</table>

Source: Consultant’s estimates

13.4 Foreign Exchange Earnings

The estimates of gross foreign exchange earnings presented in Table 3 below are derived from the tourism expenditure figures shown in Table 1 above and applying percentage breakdown figures for inbound and domestic visitor use of and expenditure upon hotel accommodation and apartments / villas respectively, identified by the MAS Centre in their Quarterly Tourism Monitor. Foreign exchange earnings are directly related to the scale of inbound visitor numbers, their length of stay and their estimated expenditure.

The estimates of foreign exchange leakages are again directly associated with the estimated tourism expenditure figures in Table 2, however, the leakages relate to the operation of tourism enterprises (the purchase of imported foodstuffs, furnishings and equipment) providing goods and services to all tourist visitors and are thus not simply confined to those purchased by overseas (inbound) visitors.

Calculation of the leakages figure is based upon estimates prepared by the Sustainable Tourism Development Plan which indicates that the level of import content in total tourism final demand is around 26 per cent of the total expenditure figure and thus the estimated leakages figure in Table 3 is 26 per cent of the total tourism expenditure figure in Table 2.

No provision has been made within the leakages figure for the inclusion of import costs associated with the materials and equipment needed to construct and fit out the hotels, resorts and visitor attractions in the Development Programme. If such costs were estimated, it is likely that the net foreign exchange earnings position shown in Table 3 would be insufficient to cover the import related costs of the investment programme. Construction works associated with the investment programme finish in 2011 and thus the net
earnings flowing from 2012 are thus unencumbered by this factor.

There are neither earnings nor leakages figures shown for 2006 and 2007 because none of the investment in accommodation is completed until 2008 and thus it is not possible to derive foreign exchange earnings from visitors until that date. However, Table 3 demonstrates that the investment programme is estimated to generate net foreign exchange earnings of almost half a billion Saudi Riyals per annum for the national economy from 2014 at 2005 values.

| Table 13.3 Estimated Foreign Exchange Earnings 2006-2014 - SR mills(2005 Values) |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
|                        | 2006             | 2007             | 2008             | 2009             | 2010             | 2011             | 2012             | 2013             | 2014             |
| Gross Earnings         | -                | 165              | 398              | 769              | 988              | 1225             | 1263             | 1277             |
| Estimated Leakages     | -                | -                | 91               | 218              | 431              | 590              | 749              | 775              | 785              |
| NET EARNINGS           | -                | -                | 74               | 180              | 338              | 398              | 476              | 488              | 492              |
| Source: Consultant's estimates |

13.5 Employment Income

Table 4 below presents the estimated employment income generated, by region, from the tourism expenditure figures shown in Table 3 above. This income is the remuneration received in wages and salaries by those working in the tourism sector and in suppliers to the sector and thus for the most part and especially where the recipients of the income reside in a given region, this income will represent a direct annual economic benefit to that region's economy.

The Sustainable Tourism Development Plan has estimated that the percentage of total sales income (total tourism expenditure) attributable to employment income is some 20 per cent and this percentage approach is adopted here where the figures in Table 4 represent 20 per cent of the respective expenditure figures in Table 2.

Table 4 thus demonstrates that by 2014 and ongoing, the Development Programme will be responsible for an annual direct injection of some SR 600 million of employment related income distributed, as shown, across the various regional economies represented along the Red Sea Coastline.

| Table 13.4 Estimated Employment Income 2006-2014 – SR mills (2005 Values) |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|
|                        | 2006             | 2007             | 2008             | 2009             | 2010             | 2011             |
| Jeddah                 | -                | 42               | 95               | 168              | 243              | 279              |
| Yanbu                  | 3                | 18               | 36               | 103              | 129              | 201              |
| Farasan                | -                | -                | 12               | 21               | 34               | 44               |
| Jizan                  | -                | 5                | 10               | 16               | 18               | 18               |
| Tabuk                  | -                | 3                | 8                | 13               | 17               | 20               |
| Asir                   | -                | 2                | 5                | 9                | 14               | 14               |
| TOTAL                  | 3                | 70               | 166              | 330              | 405              | 576              |
| Source: Consultant's estimates |

13.6 Tourism Gdp / Value Added

Table 5 below presents the estimated tourism Gross Domestic Product (GDP / value added) generated by the tourism expenditure associated with the Development Programme. Tourism GDP is a measure of the output of the tourism sector and thus that sector’s contribution to national GDP. However, GDP is not simply the sum of the output or gross revenues of the sector since such a figure being the sum of final sales includes costs associated with suppliers to the businesses responsible for these final sales figures. These costs associated with other companies’ supplies are known as intermediate consumption and they must be deducted from the gross output figures to avoid double counting of output/value added.

The GDP output figure being measured is the sum of output as the value added contribution and thus GDP and value added represent two descriptions for the same measure and are the same financial figure.

To derive the GDP/value added figures associated with the Development Programme, deductions must be made from the total output figures represented by the total tourism expenditure figures in Table 2. These deductions follow the approach adopted in the Sustainable Tourism Development Plan which in the absence of national research data on the subject, utilised established international norms instead. International experience suggests that expenditure on accommodation, food and beverage, transport and recreation incorporates a 70 per cent value added component whereas expenditure upon shopping only incorporates a 20 per cent value added element.

The figures in Table 5 below have thus been derived from a breakdown of Table 2 data to which the percentage relationships of value added to expenditure categories outlined above have been applied. Thus by 2014 and ongoing, the Development Programme is
13. Economic Impact

estimated to make a total contribution of SR 1.75 billion, annually to national GDP, at 2005 values.

| Table 13.5 Estimated Tourism GDP/Value Added 2006-2014–SR mills (2005 Values) |
|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 2006  | 2007  | 2008  | 2009  | 2010  | 2011  | 2012  | 2013  | 2014  |
| Jeddah  | -  | 123  | 277  | 442  | 704  | 809  | 832  | 833  |
| Yanbu  | -  | 54  | 108  | 202  | 375  | 580  | 607  | 628  |
| Farasan  | -  | 35  | 60  | 100  | 127  | 132  | 135  |
| Jizan  | -  | 15  | 30  | 48  | 53  | 53  |
| Tabuk  | -  | 8  | 25  | 39  | 50  | 59  | 61  |
| Asir  | -  | 7  | 15  | 27  | 39  | 42  |
| TOTAL  | -  | 159  | 348  | 564  | 830  | 924  | 937  |

Source: Consultant’s estimates

13.7 Employment Created

Table 6 below presents the pattern of direct full-time employment creation, by year and by region, associated with the Red Sea Tourism Strategy Development Programme. This table is derived from the detailed presentation of the Programme provided as an Appendix in the Appendices section of the main report.

Employment creation is heavily weighted towards Jeddah and Yanbu, in common with the other economic impact tables in this section, since this follows naturally from the distribution of investment projects which are focussed upon these two regions.

The pattern of job creation, year by year, depends upon the commencement date for construction and the time taken to build and then open a given project. Thus hotels which commence construction in 2010 (the final year of the five year Phase I Programme) and take two years to build, will not open and generate employment opportunities until 2012. The final investment projects in the Programme are completed and their associated employment is created by 2012 hence no further direct job creation is shown for 2013 and 2014.

The number of direct jobs created by the Development Programme is in excess of 2000 a year between 2008 and 2012 and cumulatively it is some 13,235 between 2007 and 2012. A number of temporary construction jobs are also likely to be created by the project investment while a larger number of existing construction sector jobs will be secured as a result of the Development Programme.

| Table 13.6 Estimated Employment Created 2006 - 2014 |
|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 2006  | 2007  | 2008  | 2009  | 2010  | 2011  | 2012  | 2013  | 2014  |
| Jeddah  | -  | 20  | 1205  | 1445  | 2050  | 1380  | 900  |
| Yanbu  | -  | 555  | 460  | 1470  | 460  | 1420  |
| Farasan  | -  | 10  | 10  | 200  | 160  | 160  |
| Jizan  | -  | 10  | 80  | 80  | 80  |
| Tabuk  | -  | 90  | 160  | 120  | 80  | 80  |
| Asir  | -  | 20  | 80  | 80  | 80  |
| TOTAL  | -  | 60  | 2020  | 2425  | 3960  | 2200  | 2560  |

Source: Consultant’s estimates

13.8 Multiplier Effect

The figures presented in Tables 2 to 6 above represent the direct economic effects of the Development Programme in terms of the immediate business performance of the investment projects in a given year. 2008 for example, is the first year where the economic effects begin to realistically appear because this is when the first operational year commences for the initial investment projects and the associated tourism expenditure begins to flow. The subsequent years thus demonstrate a combination of both the on-going opening of new investment projects together with the contribution of the earlier investment projects reaching stabilised operating performance such that by 2014 each element in the Programme has reached this stabilised position and the performance of each investment project is maximised.

The tables describe this business performance in different terms, as output (expenditure), as income, as GDP/value added and as employment (foreign exchange earnings are also identified but this is essentially subsumed within expenditure) but in each case the figures represent the direct or first round of economic effect, for example, the sum of expenditure, the employment immediately created and the wages and salaries received by the employees. However, the economic benefits of a given injection of investment do not finish at this direct or first round of economic effect, for example, the sum of expenditure, the employment immediately created and the wages and salaries received by the employees. However, the economic benefits of a given injection of investment are also generated. Indirect effects result from the subsequent business expenditure upon goods and services by the companies originally in receipt of the direct tourism expenditure while induced effects result from the consumer expenditure generated by the personal incomes created through this same direct expenditure.

The secondary effects are represented by successive rounds of decreasing levels of spending which in sum
are referred to as the multiplier effect, an effect whose initial impacts are significant and more readily measurable and whose subsequent rounds of diminishing impacts are much smaller and less easy to identify.

Work undertaken examining economic impact aspects during the preparation of the Sustainable Tourism Development Plan has identified several indicative multiplier ratios with which to arrive at a measure of the multiplier effect in four particular areas as follows:

- Output (expenditure) Multiplier: 1.45
- Income Multiplier: 1.32
- Value Added Multiplier: 1.39
- Employment Multiplier: 1.15

Application of these multiplier values to the direct economic impact effects estimated for these four factors presented in their respective tables above, gives an estimate of the respective multiplier impact effects resultant from the Phases Investment Programme and these are presented in Tables 7 to 10 below.

It should be noted that the multiplier values developed for the Master Plan are described in that document as being conservative and consequently this may be considered to apply to the multiplier analysis here. However, in the absence of other reliable and accepted data on this issue, it is considered reasonable to adopt the same approach as that taken for the Master Plan.

**Output Multiplier Effect**

Table 7 below combines the total annual tourism expenditure figures presented in Table 2 above with the private and public investment figures shown in Table 1. However, the Table 7 figures include only 74 per cent of the Table 2 expenditure data to take account of an estimated (by the Sustainable Development Master Plan consultants) 26 per cent import content within total tourism expenditure and includes only 50 per cent of the investment data in Table 1 to similarly account for estimated imported construction materials, furnishings, fitments and equipment.

Application of the 1.45 output multiplier ratio to the total output figure for each year results in the estimated multiplier effect / total effect of the expenditure / output. The figure shown for 2014 is the estimate for that year but is also the on-going position for future years (at 2005 values) in the absence of any changes to market demand or further investment in hotels, resorts, attractions and other tourism facilities.

Table 13.7 Output Multiplier Effect 2006-2014 – SR mills (2005 Values)

<table>
<thead>
<tr>
<th>Year</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public/</td>
<td>245</td>
<td>660</td>
<td>706</td>
<td>949</td>
<td>614</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Private</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourism</td>
<td>-</td>
<td>12</td>
<td>258</td>
<td>619</td>
<td>1925</td>
<td>1681</td>
<td>2533</td>
<td>2205</td>
<td>2236</td>
</tr>
<tr>
<td>Expenditure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>245</td>
<td>692</td>
<td>964</td>
<td>1568</td>
<td>1839</td>
<td>2054</td>
<td>2132</td>
<td>2205</td>
<td>2236</td>
</tr>
<tr>
<td>Output</td>
<td>-</td>
<td>1003</td>
<td>1398</td>
<td>2274</td>
<td>2667</td>
<td>2978</td>
<td>3091</td>
<td>3197</td>
<td>3242</td>
</tr>
<tr>
<td>EFFECT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Consultant’s estimates, Table 1 and Table 2

**Income Multiplier Effect**

Table 8 below presents the total employment income figures from Table 4 above and applies the income multiplier value of 1.32 above to arrive at the resultant multiplier effect shown. The data shown for 2014 is the estimate for that one year but it also represents the on-going position (in 2005 values) in the absence of changes in market demand or further investment in hotels, resorts, attractions and other tourism facilities.

Table 13.8 Income Multiplier Effect 2006-2014 – SR mills (2005 Values)

<table>
<thead>
<tr>
<th>Year</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>-</td>
<td>2</td>
<td>70</td>
<td>166</td>
<td>330</td>
<td>455</td>
<td>576</td>
<td>596</td>
<td>605</td>
</tr>
<tr>
<td>Income</td>
<td>-</td>
<td>4</td>
<td>92</td>
<td>219</td>
<td>436</td>
<td>601</td>
<td>760</td>
<td>787</td>
<td>799</td>
</tr>
<tr>
<td>EFFECT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Consultant’s estimates, Table 4

**Value Added Multiplier Effect**

Table 9 below presents the total GDP/Value Added figures from Table 5 above and applies the value added multiplier figure of 1.39 above to arrive at the resultant multiplier effect shown. The data shown for 2014 is both the estimate for that year and represents the on-going position (in 2005 values) in the absence of changes in market demand or further investment in new tourism facilities.

Table 13.9 Value Added Multiplier Effect 2006-2014 – SR mills (2005 Values)

<table>
<thead>
<tr>
<th>Year</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>-</td>
<td>2</td>
<td>207</td>
<td>490</td>
<td>918</td>
<td>1328</td>
<td>1670</td>
<td>1727</td>
<td>1753</td>
</tr>
<tr>
<td>GDP/Value</td>
<td>-</td>
<td>288</td>
<td>681</td>
<td>1276</td>
<td>1835</td>
<td>2321</td>
<td>2405</td>
<td>2437</td>
<td></td>
</tr>
<tr>
<td>Added</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EFFECT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Consultant’s estimates, Table 5
13. Economic Impact

*Employment Multiplier Effect*

Table 10 below presents the total jobs created position for each of the individual years between 2007 and 2012 taken from Table 6 above. The application of the employment multiplier value of 1.15 above to these numbers then results in the multiplier effect figures shown. The cumulative sum of the full-time jobs created in each of the years 2007-2012 is 13,255 and the application of the employment multiplier value to this figure results in a multiplier effect figure of 15,209 jobs created by the Phase 1 Development Programme.

The data shown for 2012 is both the estimate for that year and represents the on-going position in the absence of changes in market demand or the introduction of further investment in new tourism facilities.

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Jobs</td>
<td>-</td>
<td>60</td>
<td>2020</td>
<td>2425</td>
<td>3960</td>
<td>2200</td>
<td>2560</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>MULTIPLIER EFFECT</td>
<td>-</td>
<td>69</td>
<td>2323</td>
<td>2789</td>
<td>4554</td>
<td>2930</td>
<td>2944</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: Consultant’s estimates, Table 6
Economic Valuation of the Red Sea Coral reefs of Egypt

The following is a summary of a research report prepared for the Egyptian Red Sea Sustainable Tourism Initiative (RSSTI). As well as indicating the level of decline in the quality of the reefs, it provides an estimate of the economic impact on tourism of the decline, justifying expenditure on reef management.

1. The live coral cover has declined by an average of 20-30% during 1987-1996 in the Red Sea, and abuses from recreational use of the reefs [trampling and breaking corals etc.] and from coastal construction are the main offenders.

2. Tourism is the largest economic use of the reefs, much above other uses including fisheries, research value and coastal protection.

3. The Marsa Alam coastal sector has the highest value of all sectors because it is the least spoiled to date and can handle much future growth representing a high expected income stream.

4. The study examines two scenarios: the first called business as usual reflecting no adoption of a reef management system, and the second called towards sustainability which reflects the absence of such a system.

5. In the business as usual scenario, diver [including snorkelers] volume is assumed to grow above the current 1.4 million level, peaking around 1.7 million in 2035 only to fall again to the 1.4 million level by 2050 because of negative feedback from declining coral cover and other ecological indicators. The industry is assumed to contract per environmental problems of its making.

6. In the towards sustainability scenario, the report holds that the visitor volume will slowly decline to 800,000 in 2050, reflecting major decline at the Hurgada and Sharm sectors, and very limited growth in the Marsa Alam sector.

7. The study figures that the coral cover rate will continue to decline seriously in the long term substantially cutting the potential for tourism, in the business as usual case. In the towards sustainability case the coral coverage rate is largely preserved falling a relatively small amount.

8. The net benefit of the management scenario at a time horizon of 50 years out, figured in today’s dollars for the nation is $700 million which gives an order of magnitude of the cost of a management system that can be economically justified. For the Marsa Alam sector alone the net benefit is figured at $130 million. In the base cases a 3% discount rate is used to convert future values.
### Table A.1
Criteria for Management of Conservation

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>Description of ecological, cultural or economic value.</td>
</tr>
<tr>
<td>Context</td>
<td>Description of the role of the value (e.g. ecological function or social function) and its relative importance.</td>
</tr>
<tr>
<td>Condition</td>
<td>Description of the condition/status of the value.</td>
</tr>
<tr>
<td>Existing Threats</td>
<td>Outline of existing pressures on value.</td>
</tr>
<tr>
<td>Potential Threats from Tourism Development</td>
<td>Outline of potential or emerging threats on value.</td>
</tr>
<tr>
<td>Management Objectives</td>
<td>Simple statement of the desired intent.</td>
</tr>
<tr>
<td>Management Strategies</td>
<td>Outline of management approach with the use of functional mechanisms.</td>
</tr>
<tr>
<td>Performance Indicators</td>
<td>Specific measurable criteria.</td>
</tr>
<tr>
<td>Desired Trends</td>
<td>Trends in measured criteria which can be scientifically ascertained or specified with a high degree of rigour.</td>
</tr>
<tr>
<td>Targets</td>
<td>Statements of intent of the above measures within given time parameters.</td>
</tr>
</tbody>
</table>

### Table A.2
Management Approach for Water Quality

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>Water and sediment quality. Particularly the presence of organics (i.e. sewage), sediment, heavy metals and hydrocarbons.</td>
</tr>
<tr>
<td>Context</td>
<td>Good clean water quality is integral to tourism, both with regard to visual appearance, attraction and health/safety. Poor water quality will lead to declining marine habitat, lessened attraction to visitors and poor image.</td>
</tr>
<tr>
<td>Condition</td>
<td>Water quality is excellent outside of major urban areas. Poorer water quality in urban areas and particularly alongside industrial facilities (in discrete locations in Yanbu, Jeddah and Jizan).</td>
</tr>
<tr>
<td>Existing Threats</td>
<td>Discharges from desalination plants, chemical and petrochemical refineries, treated and untreated sewage, litter and general rubbish, cement factories and navigational spills.</td>
</tr>
<tr>
<td>Potential Threats from Tourism Development</td>
<td>Use of desalination and sewage treatment for new resorts. Uncontrolled or unmanaged resorts which do not look after wastes and emissions into the environment.</td>
</tr>
<tr>
<td>Management Objectives</td>
<td>To maintain good water quality which meets regional, national and international standards for bathing waters and particular marine species (if apparent). Standard water quality thresholds for Saudi Arabia are provided below in Table 7.5</td>
</tr>
</tbody>
</table>
| Management Strategies                 | • To develop monitoring strategies for major resorts which examine water quality standards and proactively react to declining or below threshold levels.  
  • Implementation of modern waste water and sewage handling facilities to ensure no untreated wastes are discharged to the sea.  
  • Control of other wastes including marinas, beaches and hotels so that all are collected and disposed of appropriately.  
  • Liaison with other coastal users to ensure that adjacent activities do not impinge on water quality value. |
| Performance Indicators                | Please see Table 7.5 below. These thresholds should be adhered to with regard to all discharges to the marine environment. |
| Desired Trends                        | Water quality which meets the requirements of a high-class tourist resort (i.e. bathing waters). |
| Targets                               | • No new resorts to discharge directly to the sea.  
  • Monitoring results to be published for all new resorts and to be disseminated to public bodies.  
  • Water quality responsibilities to be given to relevant staff members within resorts or within SCT regional areas. |
### Table A.3  
**Performance Standards for Direct Discharge to Seawater**

<table>
<thead>
<tr>
<th>Pollutants</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Physico-Chemical Pollutants</strong></td>
<td></td>
</tr>
<tr>
<td>Floating Particles</td>
<td>None</td>
</tr>
<tr>
<td>pH</td>
<td>6-9 pH Units</td>
</tr>
<tr>
<td>Total Suspended Sediments (TSS)</td>
<td>15 mg/l (Max.)</td>
</tr>
<tr>
<td>Temperature</td>
<td>On a case by case basis</td>
</tr>
<tr>
<td>Turbidity</td>
<td>75 NTU (Max.)</td>
</tr>
<tr>
<td><strong>Organic Pollutants</strong></td>
<td></td>
</tr>
<tr>
<td>Biochemical Oxygen Demand (BOD)</td>
<td>25 mg/l</td>
</tr>
<tr>
<td>COD</td>
<td>150 mg/l</td>
</tr>
<tr>
<td>Total Organic Carbon (TOC)</td>
<td>50 mg/l</td>
</tr>
<tr>
<td>Total Kjeldahl Nitrogen (TKN)</td>
<td>5 mg/l</td>
</tr>
<tr>
<td>Total Chlorinated Hydrocarbons</td>
<td>0.1 mg/l</td>
</tr>
<tr>
<td>Oil and Grease</td>
<td>8 mg/l</td>
</tr>
<tr>
<td>Phenols</td>
<td>0.1 mg/l</td>
</tr>
<tr>
<td><strong>Non-Organic Pollutants</strong></td>
<td></td>
</tr>
<tr>
<td>Ammonia (As Nitrogen)</td>
<td>1.0 mg/l</td>
</tr>
<tr>
<td>Arsenic (As)</td>
<td>0.1 mg/l</td>
</tr>
<tr>
<td>Cadmium (Cd)</td>
<td>0.02 mg/l</td>
</tr>
<tr>
<td>Chlorine (Residual) (Cl)</td>
<td>0.5 mg/l</td>
</tr>
<tr>
<td>Chromium (Total) (Cr)</td>
<td>0.1 mg/l</td>
</tr>
<tr>
<td>Copper (Cu)</td>
<td>0.2 mg/l</td>
</tr>
<tr>
<td>Cyanide (Cn)</td>
<td>0.05 mg/l</td>
</tr>
<tr>
<td>Lead (Pb)</td>
<td>0.1 mg/l</td>
</tr>
<tr>
<td>Mercury (Hg)</td>
<td>0.001 mg/l</td>
</tr>
<tr>
<td>Nickel (Ni)</td>
<td>0.2 mg/l</td>
</tr>
<tr>
<td>Phosphate (Total) as Phosphorous</td>
<td>1.0 mg/l</td>
</tr>
<tr>
<td>Zinc (Zn)</td>
<td>1.0 mg/l</td>
</tr>
<tr>
<td><strong>Biological Pollutants</strong></td>
<td></td>
</tr>
<tr>
<td>Total Coliforms</td>
<td>(Allowable Effluent 30-day Ave.) 1000 MPN per 100 ml</td>
</tr>
</tbody>
</table>
### Table A4
Management Approach for Oceanographic Processes

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>Coastal processes such as waves, currents, sediment transport and deposition.</td>
</tr>
<tr>
<td>Context</td>
<td>The dredging or reclamation of coastal areas for new resorts will inevitably affect existing coastal processes. Such changes will impact upon coastal habitats and ecological communities, other adjacent sea users and the coastline at large.</td>
</tr>
<tr>
<td>Condition</td>
<td>Reclamation is uncontrolled in several areas with many new resorts and urban areas being built in intertidal areas. These new sites are dramatically altering coastal hydrodynamics. However, large extents of the coastline remain unaltered.</td>
</tr>
<tr>
<td>Existing Threats</td>
<td>Presence of new land mass can alter currents and sediment patterns. This can lead to sediment starvation within adjacent coastal areas and increased erosion. Reclamation can also affect marine communities by direct and indirect smothering.</td>
</tr>
<tr>
<td>Potential Threats from Tourism Development</td>
<td>New reclaimed areas for tourism development can significantly affect the local marine environment. The environment which attracts the development can be irrevocably lost, thus reducing the value and benefits that could be realised.</td>
</tr>
<tr>
<td>Management Objectives</td>
<td>To avoid or minimise the amount of coastal reclamation required as part of the tourism plan. Existing coastal areas should be utilised wherever possible. If reclamation is required then comprehensive hydrodynamic studies should be undertaken.</td>
</tr>
<tr>
<td>Management Strategies</td>
<td>To avoid or minimise coastal reclamation. To undertake comprehensive modelling should it be required. To monitor changes in hydrodynamics following reclamation. To liaise with adjacent sea users who might wish to employ coastal reclamation and encourage them to investigate implications before activities are undertaken.</td>
</tr>
<tr>
<td>Performance Indicators</td>
<td>Hydrodynamic patterns should be investigated prior to undertaking construction activities, where relevant. This will provide the baseline for later monitoring and will ensure that corrections can be made should the development significantly affect the local environment.</td>
</tr>
<tr>
<td>Desired Trends</td>
<td>No change to existing coastal processes. Enhancements may be possible in areas of poor water quality, perhaps created through earlier human development.</td>
</tr>
<tr>
<td>Targets</td>
<td>No change to existing coastal processes through developments established by the tourism plan.</td>
</tr>
</tbody>
</table>

### Table A.5
Management Approach for Coral Communities

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>Coral reefs and their ecological communities, as described in Section 3.4.</td>
</tr>
<tr>
<td>Context</td>
<td>Coral reefs are vitally important to the coastal and marine environment, both in terms of the habitat they provide and their value to the KSA.</td>
</tr>
<tr>
<td>Condition</td>
<td>Generally good along the entire coastline and improves in biodiversity and quality to the south. Areas of degradation apparent outside major cities and industrial areas. Coral communities within Farasan Islands limited.</td>
</tr>
<tr>
<td>Existing Threats</td>
<td>Same as for water quality above. Coral is dependent on clean water supply for the delivery of nutrients and foods. The input of heated, enriched brine and chemical/organic laden waters will all lead to damage of coral communities. Coral is also seriously impacted upon by dredging and reclamation activities.</td>
</tr>
<tr>
<td>Potential Threats from Tourism Development</td>
<td>Threats from dredging and reclamation, discharges from desalination and sewage handling facilities etc. In addition, coral is a major attraction for visitors and may be impacted upon through increased numbers of divers and snorkellers.</td>
</tr>
<tr>
<td>Management Objectives</td>
<td>To maintain or enhance the extent and value of the coral community in the Red Sea region. Any significant adverse impact upon coral areas should be avoided at all costs. The presence of coral is a major benefit and attraction to tourists and its loss/damage will degrade the development opportunity.</td>
</tr>
<tr>
<td>Management Strategies</td>
<td>Liaise with PERSGA and NCWCD on the best means of developing and working in areas where coral communities are to be found. Design and establish resort developments that are cognisant of the damage that can be incurred and which avoid loss/damage to coral communities. Train staff and educate visitors/locals as to the value of coral and its benefits and value to KSA and the world. Establish monitoring of local coral communities to measure health and changes.</td>
</tr>
<tr>
<td>Performance Indicators</td>
<td>Coral surveys to establish health and changes over time. PERSGA should be contacted for information on how impacts upon coral communities can be measured.</td>
</tr>
<tr>
<td>Desired Trends</td>
<td>No impact upon coral communities at all. Potentially, steering of development to areas where coral is found further offshore or is of lesser ecological value.</td>
</tr>
<tr>
<td>Targets</td>
<td>No impact upon coral communities at all.</td>
</tr>
</tbody>
</table>
### Appendix A. Management Approach to the Red Sea Conservation

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Value</strong></td>
<td>Fishing industry, both locally and nationally, and the resource upon which it relies.</td>
</tr>
<tr>
<td><strong>Context</strong></td>
<td>Fishing is a major activity in the Red Sea and numerous villages (artisanal) and towns/cities (fishing industry) rely upon the fisheries resource. Impact upon fisheries or the habitats upon which they feed will affect the livelihood and social well-being of these communities.</td>
</tr>
<tr>
<td><strong>Condition</strong></td>
<td>The condition of fishing globally, including the Red Sea, is mixed. Over-fishing of resources has led to depletion of stocks and damage to their habitats and food stocks. Generally, locally based fishing in the Red Sea is sustainable in the long-term but is threatened by large-scale industrial fishing. In addition, threats to habitats from urban and industrial expansion is affecting the habitats within which fish spawn and nurse.</td>
</tr>
<tr>
<td><strong>Existing Threats</strong></td>
<td>See above.</td>
</tr>
<tr>
<td><strong>Potential Threats from Tourism Development</strong></td>
<td>Tourism developments can affect fisheries and fishing through land reclamation and the discharge of pollutants into the water. In addition, new resorts can add to resource demand and attract lower-paid fisherman to higher-paid service trades.</td>
</tr>
<tr>
<td><strong>Management Objectives</strong></td>
<td>To avoid or minimise effects on fisheries and fishing in general through the management of new developments.</td>
</tr>
</tbody>
</table>
| **Management Strategies** | - Liaison with MAW with regard to the presence of fishing communities and the value of fishing in a particular area.  
  - Attempt to integrate development with the social and economic values of communities where fishing is of key importance.  
  - Maximise the value of resorts based within fishing communities through the marketing of local trade, market and skills.  
  - Avoid or minimise impacts to fisheries, their habitats and the fishing industry. |
| **Performance Indicators** | Through liaison with MAW, to identify fisheries and fishing sensitivities and to ensure that changes are positive and not negative. Constant communication should be maintained with the relevant authorities and the local fishing co-operatives. |
| **Desired Trends** | To avoid or minimise effects or disruption to local fisheries and fishing activity through sustainable long-term development. |
| **Targets**        | Tourism development which interacts and integrates with, and enhances local communities and fishing effort. |

*Table A.6 Management Approach for Fish and Fisheries*
<table>
<thead>
<tr>
<th>Impact</th>
<th>Effect on Environmental Quality</th>
<th>Possible Mitigation Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overcrowding</td>
<td>Increased stress for visitors and reduced enjoyment of attraction. Changes in animal behaviour in wildlife areas.</td>
<td>Limit visitor access by increasing charges, reducing car parking. Expanding carrying capacity. Bus access from outlying parking areas.</td>
</tr>
<tr>
<td>Over-development</td>
<td>Habitat loss and destruction of vegetation. Visual impact on landscape. Can lead to pollution from sewerage outflows.</td>
<td>Disperse visitors to other areas and attractions. Land use planning and design controls. Using local materials and design controls to reduce visual impacts and maintain local character. Upgrade and rehabilitate. Locate high usage attractions close to access points.</td>
</tr>
<tr>
<td>Power Lines</td>
<td>Visual impact from power and telephone lines.</td>
<td>Place underground in environmentally sensitive areas.</td>
</tr>
<tr>
<td>Noise Pollution</td>
<td>Irritation for visitors, residents and wildlife.</td>
<td>Limit visitor access. Impose noise controls. Land use controls and physical noise mitigation (barriers and screens).</td>
</tr>
<tr>
<td>Litter</td>
<td>Aesthetic clutter and health hazards affect visitor enjoyment.</td>
<td>Implement better management procedures for rubbish clearance. Litter campaigns and better placement of rubbish bins.</td>
</tr>
<tr>
<td>Vandalism</td>
<td>Damage to facilities reduces visitor enjoyment, increases costs and can result in irreplaceable loss of historic and cultural amenities.</td>
<td>Implement better management procedures, surveillance and design of facilities.</td>
</tr>
<tr>
<td>Traffic Congestion</td>
<td>Increased stress for visitors and local inhabitants. Longer access times, increased air and noise pollution. Loss of wildlife and habitats. Visual impact of roads</td>
<td>Increase public transportation access. Allow and plan for wildlife habitats and animal routes (tunnels). Tree planting and bunding along roads and other screening measures to mitigate noise and air pollution for residents, as well as reduce visual impacts. One-way access roads and bus access service. Place roads underground.</td>
</tr>
<tr>
<td>Powerboats</td>
<td>Noise disturbance to wildlife, especially during nesting season. Oil pollution.</td>
<td>Restrict access and use (timing). Implement environmental education awareness programme (schools, village meetings).</td>
</tr>
<tr>
<td>Fishing and Hunting</td>
<td>Competition with natural predators. Resource depletion.</td>
<td>Restrict access except where required for culling or species control purposes. Implement environmental awareness education programmes.</td>
</tr>
<tr>
<td>Trekking</td>
<td>Disturbance to wildlife. Trail erosion.</td>
<td>Install or modify trails to be designed for increased capacity. Restrict access and use in sensitive areas. Implement environmental education awareness programmes.</td>
</tr>
<tr>
<td>Handicrafts and Souvenirs</td>
<td>Removal of endangered natural resources such as coral, ivory and shells. Disruption of the habitats, environmental and ecological cycle.</td>
<td>Legal restrictions. Reduce access. Implement environmental education awareness programmes.</td>
</tr>
<tr>
<td>Firewood Collection</td>
<td>Disruption of the habitats, environmental and ecological cycle.</td>
<td>Use of alternative fuels. Implement environmental education awareness programmes.</td>
</tr>
<tr>
<td>Unauthorised Feeding of Wildlife</td>
<td>Behavioural changes and dependency by wildlife.</td>
<td>Implement environmental education awareness programmes.</td>
</tr>
</tbody>
</table>

Table A.7
Possible Mitigation Measures
Appendix B

Priority Sites for Protected Areas: Coastal and Marine

The following coastal and marine sites were recommended in the NCWCD’s Protected Area System Plan as meriting protected area status. These sites have been reasonably well studied by the NCWCD, but were found to be of lower priority than the highest priority sites described in Chapter 6. They are briefly analysed according to the system plan’s criteria, as were the existing and high priority protected areas in Chapters Five and Six.

Sharm Zubayr, Tabuk Region, 80 sq km
The sharm and adjacent coastline include the sites of Sharm Zubayr Coast and S. Sharm Zubayr, with fossil reef cliff, narrow reef flats and fringing reef. The reefs are of high quality and a small mangrove stand marks the northern limit of mangroves on the Kingdom’s Red Sea coast.

Possible management authority: Not determined. Duba Municipality?

Ghubbat Bal’ash / Sharm Dumaygh, Tabuk Region, 103 sq km
The area includes the 33 sq km bay and lagoon of ghubbat Bal’ash, with high quality reef containing the highest recorded coral diversity along the Saudi Red Sea coast and seagrass beds, as well as the scenic lagoons of Sharm Dumaygh and Sharm ’Antar, with fringing reefs, seagrass beds, and small mangrove thickets, some 70 sq kms in area.

Possible management authority: Not determined. Al-Wajh Bank?

Sharm Husayy, Tabuk and Al-Madinah Regions
Sharm Husayy is a scenic sharm and high quality fringing reef, with fossil reef terraces.

Possible management authority: Not determined. Ministry of Agriculture.

Sharm Yanbu’, Al-Madinah Region, 50 sq km
Sharm Yanbu’ is a deep sheltered lagoon with a narrow entrance, fringing reefs and seagrass beds; it is a popular recreation site for the town of Yanbu’, and requires management to ensure that recreation will be sustainable.

Possible management authority: Royal Commission for Jubail and Yanbu’ / Yanbu’ Municipality.

Shi’b al-Qirin, Al-Madinah Region, 15 sq km
The site includes the inshore reef complex of Shi’b al-Qirin together with adjacent offshore reef complexes, all of which are popular SCUBA diving sites for boats based in Yanbu’; the area requires management for sustainable dive tourism and artisanal fishing.

Possible management authority: Royal Commission for Jubail and Yanbu’ / Yanbu’ Municipality / Private Sector?

Marsa al-Waslah / Marsa Tawil / Masturah Beach, Makkah and Al-Madinah Regions, 60 sq km
The site contains shallow lagoons with dense stands of halophytes and mangroves, seagrass, and algal beds at Masturah Beach, freshwater seeps support reeds and date palms. The area requires management for sustainable use of its natural resources, including recreation.

Possible management authority: Masturah Municipality / Ministry of Agriculture.

Marsa as-Sarraj, Makkah Region, 200 sq km
Marsa as-Sarraj is the largest landlocked lagoon on the Saudi Arabian Red Sea coast, with mangroves, halophytes, seagrass beds and a high quality fringing reef. It comprises an extensive coastal wetland, much of it seasonally inundated. The site requires management for sustainable use of its natural resources.

Possible management authority: Masturah Municipality / Ministry of Agriculture.

Marsa Umm Misk / Jazirat Haramil, Mukkah Region, 67 sq km
The shallow bay of Marsa Umm Misk with its small mangrove stands and extensive seagrass beds, important for dugongs, is presently under military control. Military control could perhaps be extended to the small adjacent island of Jazirat Haramil, which is densely vegetated and halophytes, and provides nesting habitat for bridled terms and brown noddies. The area ...
Appendix B. Priority Site for Protected Areas

requires protect of seabird and dugong populations and their habitats.  

Possible management authority: Ministry of Defence and Aviation.

Ra’s Hatibah, Makkah Region, 400-5 sq km
This large shallow lagoon with sand and coralline spits and small mangrove stand is a major recreation and tourism site; it requires protection from urban sprawl and management for substantial recreation and environmental awareness.  

Possible management authority: Ministry of Defence and Aviation / Jeddah Municipality

Jeddah Salt Marsh, Makkah Region, 100 sq km
The site is an area of saltmarsh and reefs, partly within the naval base, and is an important site for waders, as well as other birds, such as spoonbills and flamingos. The outer reef contains two shipwrecks, popular with SCUBA divers.  

Possible management authority: Ministry of Defence and Aviation / Jeddah Municipality

Ash-Shu’aybah, Makkah Region, 100 sq km
The large lagoon of Ash-Shu’aybah, with its extensive mangroves and offshore reefs, is much used for recreation by the people of Makkah and At-Ta’if, it requires protection of the mangroves and bird breeding sites, and management for sustainable recreation and environmental awareness.  

Possible management authority: Not determined.

Outer Farasan Bank, Makkah Region; Jazan Region
The Outer Farasan Bank is a major reef and island system lying approximately 50 kilometers offshore and extending some 350 kilometers from opposite Al-Lith to opposite Ash-Shuqayq. The diverse habitats include seagrass beds, coral reefs, islands and mangroves, and the area is important for seabirds and turtle breeding.  

Possible management authority: Not determined. Ministry of Agriculture?

Inner Farasan Bank, Mukkah Region
The low lying, seasonally inundated coastline between Al-Qunfudhah and Al-Lith, with fringing mangroves and islands, is a bird nesting and feeding area and dugong site; it is also an important artisanal fishing area.  

Possible management authority: Ministry of Agriculture.

Jazirat Marka / Khawr Nahud, Makkah Region (now ‘Asir Region)
Jazirat Marka is a low sandy island west of Al-Birk with dense halophytes; it serves as a breeding site for osprey, brown noddy, and African collared dove, and is surrounded by coral reefs of high quality. The adjacent Khawr Nahud, just north of Al-Birk, is a small lagoon with fringing corals, mangroves and seagrass beds. Both are important sites for birds, and are likely to be important for dugong. The site could be extended northward to include the adjacent Khawr ’Amaq; it could be included in ‘Asir National Park.  

Possible management authority: Ministry of Agriculture or NCWCD. Separate?

Khawr ’Itwad / Shi’b Abu al-Liqa’ / Shi’b al-Kabir, Jazan Region, 210 sq km
The area includes small lagoons with abundant mangroves and coral reefs; abundant seagrass is found in Khawr ’Itwad.  

Possible management authority: Ministry of Agriculture.

Ra’s at-Tarfa’, Jazan Region
Ra’s at ‘Tarfa’ is a large spit with mangroves and seagrass beds, diverse avifauna including osprey, pelican, flamingo and white-collared kingfisher; dugong and idmi gazelles are reported. The site requires protection of wildlife populations and habitats, and management for substantial use of natural resources including artisanal fishing.  

Possible management authority: NCWCS, MOMRA: Jazan Municipality. Ministry of Agriculture?

Khawr Wahlan, Jazan Region, 27 sq km
Khawr Wahlan is a halophytic salt marsh with mangroves and seagrasses, containing the nationally significant wetland of Sawarimah, a coastal dune aquifer where a freshwater lens, overlying the deeper subsurface saltwater wedge, emerges in low-lying slacks, or as seeps along the base of a low dune plateau at its junction with saltflats or the shoreline, as indicated by a line of reeds or scrub growth. The wetland occurs on the margin of a dune-backed embayment near Sawarimah village, about 40 km south of Jazan. It is a broad perennial sedge marshland of Cyperus laevigatus, fed from the adjacent dune plateau and/or by upward leakage from a buried faultline. At 500 x 200m in size this is the largest perennial wetland on the Red Sea Coast, and possibly the only perennial wetland system south of Jazan. The site requires monitoring and management for substantial use, including artisanal fishing and grazing. As described in the original System Plan,
however, the potential Khawr Wahlan protected area
did not include this wetland.

Possible management authority: MOMRA: Jazan Mu-
nicipality / Ministry of Agriculture.

Duwayyimah, Jazan Region, 160 sq km
The shallow lagoon of Duwayyimah at the Yemen
boundary near Muwassam contains mangroves
and seagrasses.

Possible management authority: Ministry of the Interior:
Frontier Guards.

Jazirat Al-‘Arabiyah, Eastern Region
The easternmost of the offshore islands in the Saudi
Arabian waters of the Arabian Gulf contains nesting
sites for seabirds and possibly turtles, and a fringing
coral reef of high quality.

Possible management authority: Ministry of Defense
and Aviation / Saudi Aramco

As-Saffaniyah / Manifah Bay, Eastern Region
The area is a complex series of bays and open coastlines
with extensive seagrass beds and saltmarshes; it con-
tains important shrimp nurseries and habitats for sea
turtles. The area is associated with As-Saffaniyah oil
field, the largest known offshore oil field on Earth.

Possible management authority: Saudi Aramco

Al-Khubar, Eastern Region
The site is an extensive area of shallow water with sea-
grass beds, extending eastward offshore of Al-Khubar
and south to the Bahrain causeway. It is an important
fishing area with dugong habitats, and is affected by
landfill and dredging.

Possible management authority: Ministry of Agriculture;
Al-Khubar Municipality.
Appendix C

Hotel Resort Public Realm Areas

Architectural and landscape detailing should provide local distinctive character for public realm areas.

Minimal external soft landscaping needed in order to promote low water usage and to contribute towards local character. Local species should be used for planting and to create distinctive environment (with some colour) and to provide occasional shade.
Appendix C. Hotel Resort Public Realm Areas

Hotel Resort Public Buildings

Open reception areas allowing natural ventilation and preferably views to key natural features, such as the sea.

Walkways between facilities within resort central area to be open and covered with some water features.

Larger scale walkway covering for more popular routes of retail arcade areas.

Large windows to allow light into building with options for open or enclosed space during winter summer.

Interior Detailing of Public Areas

Interior detailing should aim for a combination of modern simplicity and local style.
Landscape Detailing

Beachfront landscape should be simple and easy to maintain and reflect local character of terrain

Some landscape detailing for spatial edges and features that reflect local traditions at route intersections

Villa Entrances

Distinct villa entrance with strong gateway feature incorporating local architectural style

Sense of privacy needs to be established through the design of villa entrances. Feeling of separation from the public realm area
Appendix C. Hotel Resort Public Realm Areas

Villa Courtyard Areas

Large villas with private courtyards and landscaped areas

Smaller villas with plunge pools and private outdoor spaces

Interior Villa Decor

Living room in large villa

Access to private courtyard in small villa

Bedroom and living room in large villa

Bedroom and terrace in small villa
<table>
<thead>
<tr>
<th>Zone 1: JEDDAH</th>
<th>TOURISM STOCK</th>
<th>INFRASTRUCTURE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hotels/Resorts</td>
<td>Attractions</td>
</tr>
<tr>
<td>Phase 3 (2016-2020)</td>
<td>Resort Hotels/ Apartments/Villas - Thuwal - Shwaba</td>
<td>Amusement Parks Museums e.g. Khuzam Palace area</td>
</tr>
<tr>
<td>Phase 4 (2021-2025)</td>
<td>Resort Hotels/ Apartments/Villas - Thuwal - Shwaba</td>
<td>Amusement Parks Museums</td>
</tr>
</tbody>
</table>
## Appendix D. Development Programme 2006-2010

### Zone 2: YANBU Resort Development

#### TOURISM STOCK

<table>
<thead>
<tr>
<th>Hotels/Resorts</th>
<th>Attractions</th>
<th>Activities</th>
<th>Support</th>
<th>Roads</th>
<th>Rail</th>
<th>Air</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phase 1</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2006-2010)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resorts/Hotels/</td>
<td>Restore old Yanbu</td>
<td>Dive Centre/Marina</td>
<td>Masterplan for Sharm</td>
<td>Continue road</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apartments on the</td>
<td>Battlefield Plan for</td>
<td>Festival</td>
<td>area - need for focus of development</td>
<td>improvement north of Yanbu</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharm (20)</td>
<td>Badr</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ecolodges at Al</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rayis and inland at</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nakhl (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Hotels (2/3)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Phase 2</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2011-2015)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional resorts/</td>
<td>Heritage Centre in old</td>
<td>Additional Marina</td>
<td>TIC in old Yanbu</td>
<td></td>
<td></td>
<td></td>
<td>Upgrade services to Yanbu airport</td>
</tr>
<tr>
<td>hotels/apartments/</td>
<td>Yanbu Restoration of</td>
<td>boat maintenance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>villas on the Sharm</td>
<td>historic villages in</td>
<td>facilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(20)</td>
<td>Yanbu on Nakhl</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ecolodges</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Hotels</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Phase 3</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2016-2020)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional resorts/</td>
<td>Amusement Parks</td>
<td>Additional Marina</td>
<td>TIC/Visitor Centre</td>
<td></td>
<td></td>
<td></td>
<td>Coastal link to Jeddah and inland to Madinah</td>
</tr>
<tr>
<td>Hotels/ apartments/</td>
<td></td>
<td></td>
<td>on the Sharm</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>villas on the Sharm</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Phase 4</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2021-2025)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional resorts/</td>
<td>Amusement Parks</td>
<td>Additional Marina</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotels/ apartments/</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>villas on the Sharm</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zone 3: FARASAN ISLANDS</td>
<td>TOURISM STOCK</td>
<td>INFRASTRUCTURE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
<td>--------------</td>
<td>----------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hotels/Resorts</td>
<td>Attraction(s)</td>
<td>Activities</td>
<td>Support</td>
<td>Roads</td>
<td>Rail</td>
<td>Air/Other</td>
</tr>
<tr>
<td></td>
<td>Heritage Centre (old Farasan town)</td>
<td>Develop Farasan Festival</td>
<td>Tourist Information Centre</td>
<td>Upgrade of island roads as appropriate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase 1 (2006-2010)</td>
<td>Specialist Dive Centres - 5 star (2), Mid range (2), Small Resort Hotels (2/3)</td>
<td>Non-motorised watersports</td>
<td>Marina and Maintenance Yard</td>
<td>New airstrip (non-jet)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Heritage Centre (old Farasan town)</td>
<td>Develop Farasan Festival</td>
<td>Tourist Information Centre</td>
<td>Upgrade of island roads as appropriate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Heritage Centre (old Farasan town)</td>
<td>Develop Farasan Festival</td>
<td>Tourist Information Centre</td>
<td>Upgrade of island roads as appropriate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase 2 (2011-2015)</td>
<td>Additional dive centres (2) Field Study Centre</td>
<td>Park Centre</td>
<td>Festivals</td>
<td>Improved Park Management</td>
<td>Health Centre</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Additional dive centres (2) Field Study Centre</td>
<td>Park Centre</td>
<td>Festivals</td>
<td>Improved Park Management</td>
<td>Health Centre</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase 3 (2016-2020)</td>
<td>Review of island carrying capacity</td>
<td>Festivals</td>
<td>Festivals</td>
<td>Festivals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase 4 (2021-2025)</td>
<td>Additional hotels if within carrying capacity</td>
<td>Festivals</td>
<td>Festivals</td>
<td>Festivals</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Zone 4: JIZAN

<table>
<thead>
<tr>
<th>Phase 1 (2006-2010)</th>
<th>Small resorts/beach hotels (2/3) - Al Qauz/Turfah - Shuqayq</th>
<th>Study reuse of Turkish Fort</th>
<th>Enhancement of tourist facilities on Corniche</th>
<th>Develop Jizan Festival especially Food/Seafood</th>
<th>TIC in Jizan Community tourism programme in mountains - Fayfa</th>
<th>Improve roads in mountain areas</th>
<th>Study with impact of coastal railway north to Makkah</th>
<th>Increase regional services to airport</th>
<th>Improve health services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 2 (2011-2015)</td>
<td>Small resorts/beach hotels (2/3) - Al Qauz/Turfah - Shuqayq</td>
<td>Amusement Parks</td>
<td>Dive Centre/Marina</td>
<td></td>
<td></td>
<td>Improve access to coastal areas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase 3 (2016-2020)</td>
<td>Small resorts/beach hotels</td>
<td>Dive Centre/Marina</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase 4 (2021-2025)</td>
<td>Small resorts/beach hotels</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Zone 5: TABUK

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TOURISM STOCK</td>
<td>Hotels/Resorts</td>
<td>Attractions</td>
<td>Activities</td>
<td>Support</td>
</tr>
<tr>
<td>Phase 1</td>
<td>Small resorts/beach hotels (2/3) - Haql, Sharm</td>
<td>Heritage Centre in Duba</td>
<td>Dive centres (C)</td>
<td>Major resort at Sharm, subject to improvement in infrastructure</td>
</tr>
<tr>
<td>Phase 2</td>
<td>Major resort at Sharm, subject to improvement in infrastructure</td>
<td>Heritage Centre in Duba</td>
<td>Dive centre</td>
<td>Major/medium resorts/beach hotels</td>
</tr>
<tr>
<td>Phase 3</td>
<td>Major resort in Sharm</td>
<td>Heritage Centre in Duba</td>
<td>Dive centre</td>
<td>Major resort at Sharm, Small/medium resorts/beach hotels</td>
</tr>
<tr>
<td>Phase 4</td>
<td>Major resort at Sharm, Small/medium resorts/beach hotels</td>
<td>Heritage Centre in Duba</td>
<td>Dive centre</td>
<td>Major resort at Sharm, Small/medium resorts/beach hotels</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INFRASTRUCTURE</th>
<th>Hotels/Resorts</th>
<th>Attractions</th>
<th>Activities</th>
<th>Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Study reuse of Muwallah Fort Heritage Centre in Duba/Al Wajh/Umm Lujj</td>
<td>Mountain/Adventure Trips</td>
<td>Dive centres (C)</td>
<td>Major resort at Sharm, Small/medium resorts/beach hotels</td>
<td></td>
</tr>
<tr>
<td>Study into development of new airport at Sharm</td>
<td>Completion of coastal highway</td>
<td>New airport at Sharm, improve airport at Wajh</td>
<td>Major resort at Sharm, Small/medium resorts/beach hotels</td>
<td></td>
</tr>
<tr>
<td>Improvement roads in mountain areas</td>
<td>Mountain Visitor Centre (Tabuk/Sharm Road)</td>
<td>Major resort in Sharm</td>
<td>Major resort at Sharm, Small/medium resorts/beach hotels</td>
<td></td>
</tr>
<tr>
<td>Completion of coastal highway</td>
<td>Study reuse of Muwallah Fort Heritage Centre in Duba/Al Wajh/Umm Lujj</td>
<td>Dive centres (C)</td>
<td>Major resort at Sharm, Small/medium resorts/beach hotels</td>
<td></td>
</tr>
<tr>
<td>Study into development of new airport at Sharm</td>
<td>Completion of coastal highway</td>
<td>New airport at Sharm, improve airport at Wajh</td>
<td>Major resort at Sharm, Small/medium resorts/beach hotels</td>
<td></td>
</tr>
</tbody>
</table>

- **Hotels/Resorts**
  - Small resorts/beach hotels (2/3)
  - Major resort at Sharm, subject to improvement in infrastructure

- **Attractions**
  - Heritage Centre in Duba
  - Dive centres (C)

- **Activities**
  - Mountain/Adventure Trips

- **Support**
  - Study into development of new airport at Sharm
<table>
<thead>
<tr>
<th>Zone 6: SOUTH MAKKAH / ASIER</th>
<th>TOURISM STOCK</th>
<th>INFRASTRUCTURE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hotels/Resorts</td>
<td>Attractions</td>
</tr>
<tr>
<td>Phase 1 (2006-2010)</td>
<td>Small resorts/beach hotels (2/3) - Al Birk - Al Lith - Al Qunfidah</td>
<td>Dive centre</td>
</tr>
<tr>
<td>Phase 2 (2011-2015)</td>
<td>Small resorts/beach hotels (2/3)</td>
<td>Dive centre</td>
</tr>
<tr>
<td>Phase 3 (2016-2020)</td>
<td>Small resorts/beach hotels</td>
<td>Dive centre</td>
</tr>
<tr>
<td>Phase 4 (2021-2025)</td>
<td>Small resorts/beach hotels</td>
<td>Dive centre</td>
</tr>
</tbody>
</table>