

RIYADH

Destination Report

20
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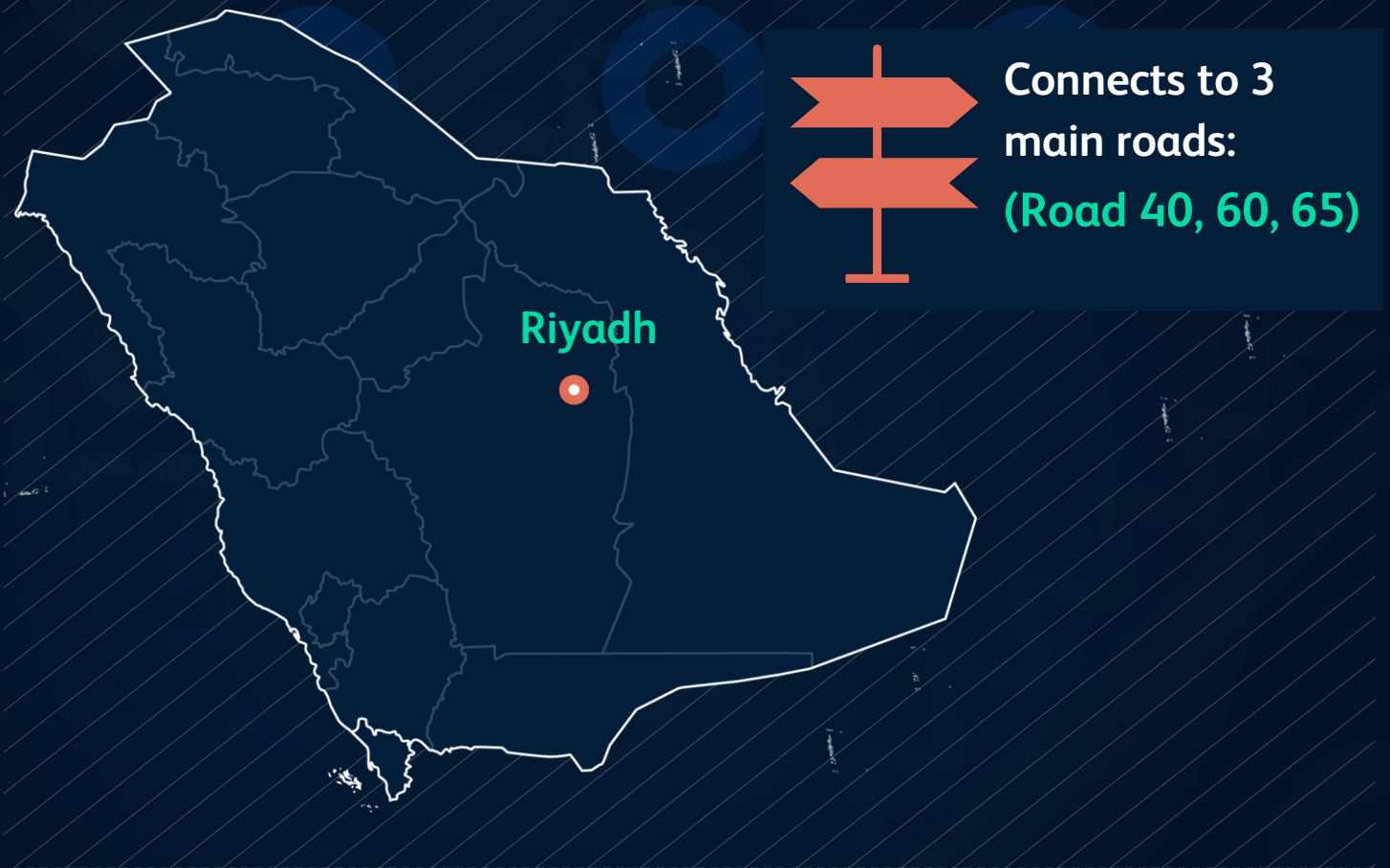
Tourism صندوق
Development التنمية
Fund السياحي



RIYADH

Capital of Arabia

Located in the center of the Kingdom, the capital city is the largest by population and accounts for over a quarter of KSA's population. The birthplace of modern Saudi Arabia has evolved into a bustling metropolis, rich in history and culture. The influx of young Saudis migrating to Riyadh and the ongoing social transformation of the city have made Riyadh the place to be for business, entertainment, and tourism. With upcoming mega projects, public transportation initiatives, economic zones, events & festivals, and a rich portfolio of cultural and heritage assets, Riyadh's future is sure to be full of excitement.



Population 2022

7,009,120





Winter	13 - 23 ° C
Spring	24 - 38 ° C
Summer	25 - 45 ° C
Autumn	18 - 35 ° C

Best Times to Visit

Winter Season

November to March

Camping Season

November to March

34%

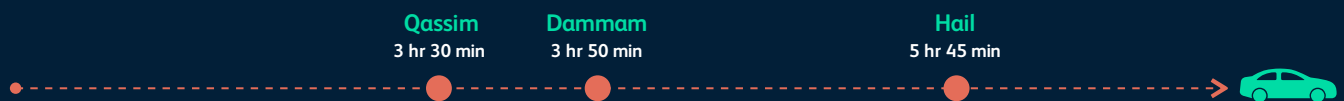
Ages < 30



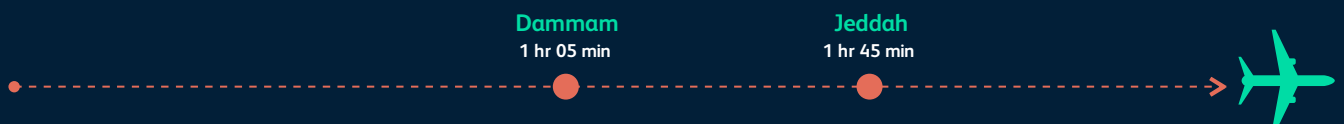
Proximity to Nearby Cities

Riyadh has exceptional accessibility through road and air transport, including a world-class international airport. Land transportation is the preferred mode for cities, especially those within a 5-6 hour drive radius, with several airports connected with KKIA. Riyadh's large population and rapid expansion can sometimes lead to internal congestion issues, but there are many road and public transportation initiatives underway to streamline transportation within the city.

Driving



Flying



Source : SAMA, Ministry of Tourism, GASTAT, Visit Saudi, TDF Analysis

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Key Highlights



01

Most populous city in the Kingdom with a high proportion of relatively well-educated youth, and announced plan to increase the population to 10 million by 2030.

02

Attracting a high influx of domestic population from nearby regions due to its role as the economic center of KSA.

03

One of key KSA destinations to benefit from rich pipeline of world events, such as Expo 2030, FIFA World Cup, AFC Asia Cup, and more.

04

Home to the second busiest international airport in KSA in terms of passengers served and number of flights, with a massive expansion expected in the upcoming years.

05

Several ongoing giga-projects will be game-changers and transform the region, such as Diriyah Gate, Qiddiyah Entertainment City, Murabba, King Salman Park, etc.

06

Active public transportation services with Riyadh Metro and several ongoing expansions underway.

07

Riyadh's natural diversity, including deserts, caves, and wildlife, offers distinctive attractions for nature lovers, supported by government-led initiatives that further enhance these offerings.

08

Festivals, entertainment offerings, and arts & culture assets help attract tourists throughout the year, such as the highly successful Riyadh Season.

09

Strong hospitality performance with among the highest RevPAR in the GCC, driven by strong and stable demand.

10

Young entrepreneurial population that are globally well-traveled and contributing to the Riyadh's growing fashion, retail, gastronomic, cultural, and entertainment landscape.

11

Internationally recognized tourism assets and highest number of top and high potential sites.

Source : MT, TDF analysis

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Tourism Landscape (2024)

01

A Top KSA Tourism Destination¹

Riyadh visitors reached 15.4 million overnight visits, while both overnight visitors and spend grew by 2% and 0.01% YoY, and remain well above 2019 levels by 95% and 33%.

15.4Mn

Total Overnight
Visits

02

Growing Domestic & Dropping Inbound

Riyadh's domestic segment has more than doubled since 2019 in both visits and spend, while inbound witnessed a decrease YoY in visits and spend -3% and -13%, mainly due to a drop in VFR.

95%

Growth in overall visits
since 2019

03

Stable Seasonality with Peak in Winter

Riyadh is considered as a stable seasonal destination with 32% of visits assuring in January, February, and December due to Riyadh season and cooler weather.

32%

of visits occur in
January, February and
December

04

Leisure & VFR are main Travel Purpose

Leisure is the top travel purpose in 2024, with strong growth among inbound where visitors more than doubled YoY. VFR was the second major travel purpose with healthy growth among domestic & inbound in both visits and spend.

70%

of visits driven by
Leisure & VFR

05

Families & Couples make up the main visitor profile

Riyadh is a mainly a Family / Couples destination among both domestic and inbound visitors.

2.5 – 2.9

Average party size in
2024

06

Transportation, F&B, and Accommodation

Transportation, F&B and Accommodation were the top tourism spend segments accounting for 75% of total spend.

75%

of total spend from
F&B, Transport, and
Accommodation

07

Bahrain, Egypt, and Qatar Are the Top Source Markets

Bahrain accounted for 19.4% of total inbound visits, while UAE and Egypt accounted for 14.1% and 13.6%.

47%

of inbound visits from
Bahrain, UAE, and
Egypt

Source : Ministry of Tourism, TDF Analysis ¹ Data is for domestic and inbound.

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Key Upcoming Projects

Non-Exhaustive



King Salman International Airport

Set to position Riyadh as a global logistics hub. It will cover 57 km², allow for six parallel runways, and be powered by renewable energy. It aims to accommodate 120 million travelers by 2030, and 185 million passengers by 2050.

Stage:	Execution
Value:	30,000Mn \$
Completion (estimate)	Q4 2030
Site Area	57 km ²
Key Components	Expand PAX capacity to 120 Mn



Riyadh Metro

Part of the Riyadh Transport Project (RTP), the Riyadh Metro officially launched in late 2024 while additional lines will be opened to connect key areas around the city in phases.

Stage:	Execution
Value:	35Mn \$
Completion (estimate)	Q4 2032
Key Components	176 km length 85 stations



King Salman Park

Among being one of the largest urban parks in the world, the massive park will include various facilities and activities centered around the environment, sports, culture, and entertainment.

Stage:	Execution
Value:	363Mn \$
Completion (estimate)	Q4 2028
Site Area	13 km ²
Key Components	Hotel & Leisure Recreation & Sports Park



The Sport Boulevard

One of Riyadh's mega projects that connecting Wadi Hanifa in the west to Wadi Al-Sulai in the east through Prince Mohammed bin Salman Road, with more than 135 km to become the largest linear park in the world.

Stage:	Execution
Value:	8,500Mn \$
Completion (estimate)	Q4 2030
Key Components	Wadi Districts Arts District Entertainment Athletics

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Key Upcoming Projects

Non-Exhaustive



Diriyah Gate Project

Poised to become the Kingdom's historic and cultural heart, the Diriyah development project mixed-use lifestyle destination will showcase Saudi's rich history. Centered on the At-Turiah UNESCO World Heritage Site.

Stage:	Execution
Value:	63,200Mn \$
Completion (estimate)	Q4 2030
Site Area	7.1 km2
Key Components	Culture & Heritage Universities & Arts E-Formula Racetrack Hospitality



New Murabba

The world's largest modern "Downtown". The project will be built around the concept of sustainability across 19 million sqm land area. The centerpiece "Mukaab" will measure 400m in height, width, and length and span 2 million sqm of floor space.

Stage:	Execution
Value:	12,000Mn \$
Completion (estimate)	Q4 2030
Site Area	19 km2
Key Components	Mukaab Tower Hotel & Office Residential F&B and Retail



Qiddiya City

Set to become the capital of Entertainment, Sports, and Arts, the Qiddiya Entertainment City is more than 2.5 times the size of Walt Disney World. It will consist of Six Flags Qiddiya, Championship Golf Courses, Football Stadiums, Water Theme Parks, Racetracks, and more.

Stage:	Execution
Value:	32,179Mn \$
Completion (estimate)	Q4 2034
Site Area	334 km2
Key Components	Hotel & Leisure Entertainment Sports & Residential



KAHD

The financial hub of Riyadh, the King Abdullah Financial District (KAHD) is divided into 5 zones across different land parcels and connected with the Riyadh Metro. The district is currently operational with ongoing expansions in progress.

Stage:	Execution
Value:	10,500Mn \$
Completion (estimate)	Q4 2027
Key Components	Office & Hotels Residential Entertainment Commercial

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Key Upcoming Projects

Non-Exhaustive



Riyadh Expo 2030

Located North of Riyadh and close to King Salman International Airport, the event is aiming to attract over 40 million visitors. A dedicated PIF-subsubsidiary has been launched, Expo 2030 Riyadh Company (ERC), to build and operate the project.

Stage:	Design
Value:	7,800Mn \$
Completion (estimate)	Q4 2029
Site Area	6 km2
Key Components	226 pavilions C3 Corner Experiential Space



The Avenues - Riyadh

Mabane and Shomoul Holding are developing a mixed-use project in North Riyadh with a GLA of ~400K sqm and a built-up area of +1.4 million sqm. The construction works were announced to have reached 65% completion and aim for phased opening in late 2026.

Stage:	Execution
Value:	2,260Mn \$
Completion (estimate)	Q4 2026
GLA BUA	370,000 m2 1.8 Mn m2
Key Components	Mall & Retail Hotel Office & Residential

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Value Proposition



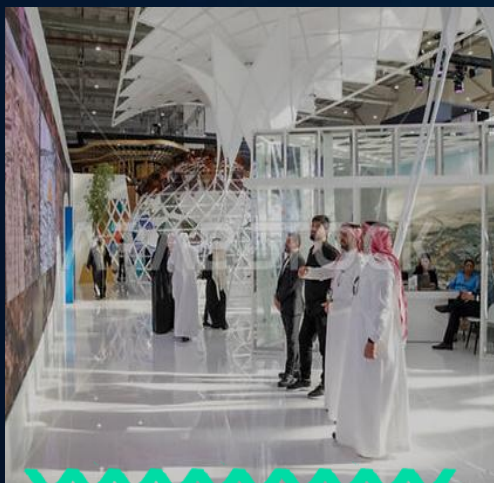
Culture & Heritage

Riyadh's rich portfolio of cultural and historical assets makes it pivotal to KSA's tourism ambitions. There are several mega-projects dedicated to building unique tourism destinations centered around these assets.



Entertainment

Riyadh is currently the premier destination for entertainment in KSA, due to the success of Riyadh Season and upcoming giga-projects such as Qiddiya and a large pipeline of entertainment offerings and events.



Business & MICE

As the capital of Saudi Arabia, Riyadh is a major hub for business events, conferences, and exhibitions. The city hosts large-scale international forums and business meetings, such as the Future Investment Initiative (FII), attracting global business leaders and professionals.

Source : MT, TDF analysis

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Value Proposition



Gastronomy

As the capital of the Kingdom, Riyadh is home to a rich variety of food experiences, from local delicacies to modern cafes to world-class international fine dining experiences. The food scene in the city has exploded in recent years, with the rise of local talents, increased interest from global food restaurants, and growth in the city.



Shopping

Riyadh boasts world-class shopping malls where visitors can indulge in luxury retail experiences, family-focused malls, traditional souks offering unique local products and more.



Nature & Recreation

The Riyadh region has a rich variety of natural assets, including deserts, caves, and wildlife. Ongoing and upcoming government-led initiatives and projects will further diversify Riyadh's offerings to nature-lovers and adventure-seekers.

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Culture & Heritage

Non-Exhaustive

In addition to the Diriyah Gate Project and At-Turaif UNESCO World Heritage Site, Riyadh boasts among the largest collections of cultural and historical assets. As the capital city, its assets provide a glimpse into the founding of the Kingdom, while the many villages and towns are decorated with Najdi architecture and artifacts, from when they were major stopping points for pilgrims from the east coming to Makkah.



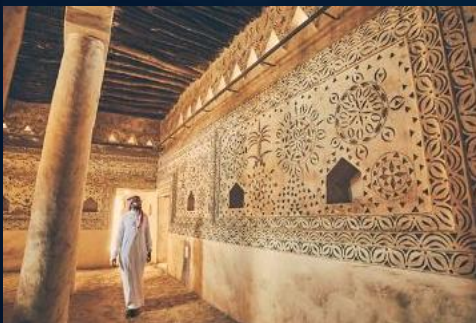
At-Turaif District

A **UNESCO World Heritage Site** and the centerpiece for the **Diriyah Gate megaproject**, At-Turaif is a must-see historic gem with over three-hundred years of history as the first Saudi capital. At-Turaif is poised to be a premier cultural and historical attraction and destination.



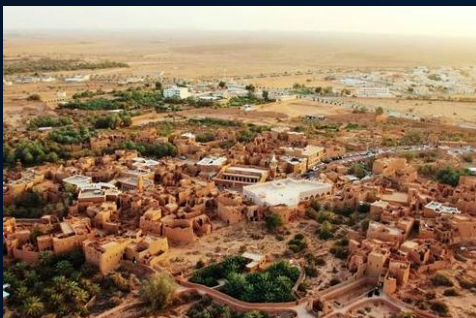
The National Museum

The museum offers 8 distinct hall, including halls covering prehistoric periods, pre-Islamic era, and the rich history of KSA. It contains +3,000 antiquities on display. Also featured nearby is **Al Murabba Palace**, the former home and court of King Abdulaziz, founder of modern Saudi Arabia.



Al Masmak Fortress

A vast clay and mud-brick citadel built in 1865 and witnessed the birth of the Kingdom. The building has since been restored as a museum displaying KSA's rich history and features a vast array of artifacts, photos, and films. The courtyard outside features **Souq Al Zal**, where visitors can find traditional handicrafts, jewelry, and other souvenirs.



Ushaiger Heritage Village

Hidden in the heart of Najd, an oasis dotted region 200 km northwest of Riyadh. Ushaiger Heritage Village provides a glimpse of a slow-paced Saudi society. **The Al Salem museum**, established by its residents, boasts a large collection of artifacts to explore the villages rich history.

Source : MT, Visit Saudi, Publicly available sources, and TDF analysis.

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Entertainment

Non-Exhaustive

Riyadh is currently the premier destination for entertainment in KSA, due to the success of Riyadh Season and upcoming giga-projects such as Qiddiya. Additional mega-malls and lifestyle projects will also shape its leisure tourism landscape for years to come.



Riyadh Season

Riyadh Season is held annually and features thousands of events, international exhibitions, experiences, restaurants, and more. Often launched in Q4 and lasting several months, Riyadh Season is always grand in scale and attracts local and international visitors. In 2024, Riyadh Season attracted +12 million visitors within the first 3 months.



The Boulevard Riyadh City

A premier entertainment, shopping, and lifestyle destination in Riyadh, offering a wide range of attractions including luxury retail outlets, fine dining, theaters, and live performance venues. It is a vibrant hub for both residents and tourists, playing a central role during major events like Riyadh Season. The Boulevard serves as a focal point for entertainment and cultural experiences, attracting millions of visitors annually with its dynamic mix of events, family-friendly activities, and world-class facilities.



Shopping

Home to many of the Kingdom's most visited malls across different segments, upscale, mid-market, and traditional markets. Several large-scale projects (such as Solitaire Mall, The Avenues, and more) are expected to be completed in the coming years and will transform the retail sector in the city. In addition, there is a growing fashion scene as new local designers enter the industry and the Saudi Fashion Week.



Outdoor Recreation & Sports

Riyadh provides visitors with a variety of recreational and sports activities, especially during the winter months. Its desert dunes provide residents and visitors with a wide array of adrenaline-rush activities and desert camping "Kashtah". Biking and hiking activities have also grown in popularity, while ongoing projects such as Riyadh AlMasar will provide cycling paths, sports facilities, and more to promote healthy lifestyles.

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Gastronomy

Non-Exhaustive

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Najd Cuisine

Influenced by the region's topography and desert climates, Najd dishes are hearty and wholesome, the food is dominated by rich stews, wheat, and rice dishes paired with fragrant spices. From locally popular dishes like Kabsa, Jareesh, Ghorsan, Mataziz, and more, Najd cuisine has a lot to offer to those wishing to taste local food.



Fine Dining

Riyadh is home to some of the most popular fine dining establishments in the country, as more and more world-class global restaurants open branches in the capital city. In addition to current supply, pop-up restaurants are often available during Riyadh Season and other seasonal events, providing a wide array of food experiences.



Homegrown Brands

In addition to local cuisine, Riyadh is home to a variety of well-known local brands and restaurant chains that have become staples for residents and visitors alike. The explosion of food entrepreneurs and rapid urbanization gave rise to many new entrants to the market, providing local options for various segments of customers in the fast-food, casual, fast-casual, and fine dining segments.

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Business and MICE

Non-Exhaustive

Riyadh is a leading hub for business and MICE (Meetings, Incentives, Conferences, and Exhibitions) tourism in Saudi Arabia. As the nation's capital, it hosts major events, attracting global leaders and investors. With state-of-the-art conference facilities, luxury hotels, and excellent infrastructure, Riyadh is an ideal destination for corporate events and international exhibitions. Its strategic location and vibrant business environment make it a key center for professional networking and collaboration.



LEAP Tech Conference

The LEAP Tech Conference in Riyadh is an annual event that gathers global tech leaders to showcase innovations in AI, robotics, and digital transformation. It supports Saudi Arabia's Vision 2030 by positioning Riyadh as a tech hub and promoting economic diversification.



Future Investment Initiative (FII)

The Future Investment Initiative (FII) is an annual forum in Riyadh that gathers global leaders and investors to discuss investment trends and economic diversification. Aligned with Vision 2030, it promotes international partnerships and showcases Saudi Arabia's growth in sectors like technology, energy, and tourism.



Global Logistics Forum

The Global Logistics Forum in Riyadh is an annual event that brings together industry leaders to explore logistics innovations and challenges. Aligned with Vision 2030, it aims to position Saudi Arabia as a global logistics hub, connecting markets across Asia, Europe, and Africa.

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Nature

Non-Exhaustive

The Riyadh region has a rich variety of natural assets, including deserts, caves, and wildlife. As part of Riyadh's transformation, work is ongoing to enhance natural assets as tourist destinations. Coupled with initiatives like Green Riyadh and the upcoming King Salman Park, the capital city will provide visitors and residents with a wide array of activities to enjoy nature.



Edge of the World

One of Saudi's most popular tourist destinations, its 300-meter-high cliffs overlook the surrounding plain and provides a unique experience to adventure-seekers.



Green Riyadh

One of the most ambitious urban forestation projects globally, Green Riyadh aims to use recycled water to develop 541 km² of green space and plant 7.5 million trees. Once complete, it will reduce temperatures & dust, improve air quality, and support and promote efforts to preserve natural areas and biodiversity.



Heat Cave

Located in Al-Jubayl mountain in Wadi Al-Sulay, it is one of the most accessible caves in Riyadh with an entrance about 20 meters wide. Development is ongoing to improve the tourism infrastructure, increase safety, and provide additional services and offerings.



Al Ghat

Al Ghat national park has a rich flora diversity. The park is situated in Al Ghat, in the vicinity of one of the largest and best conserved traditional villages of Saudi Arabia.

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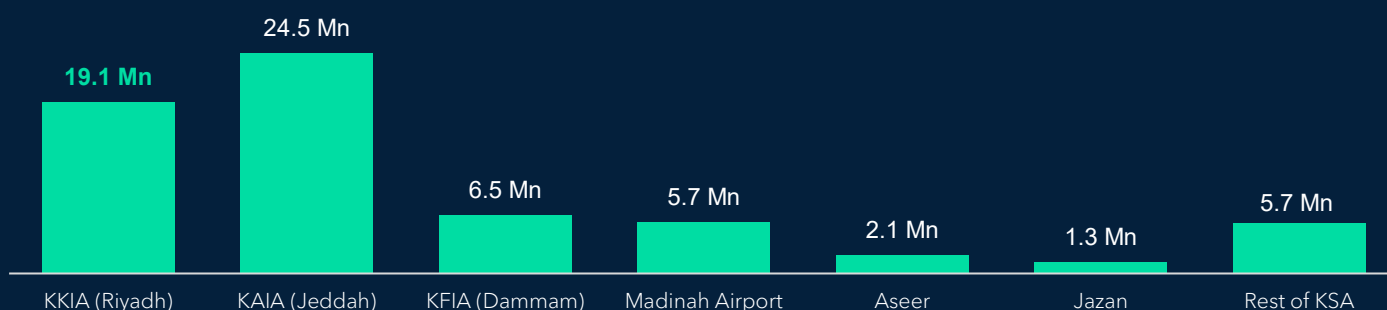


Connectivity

Air Transport

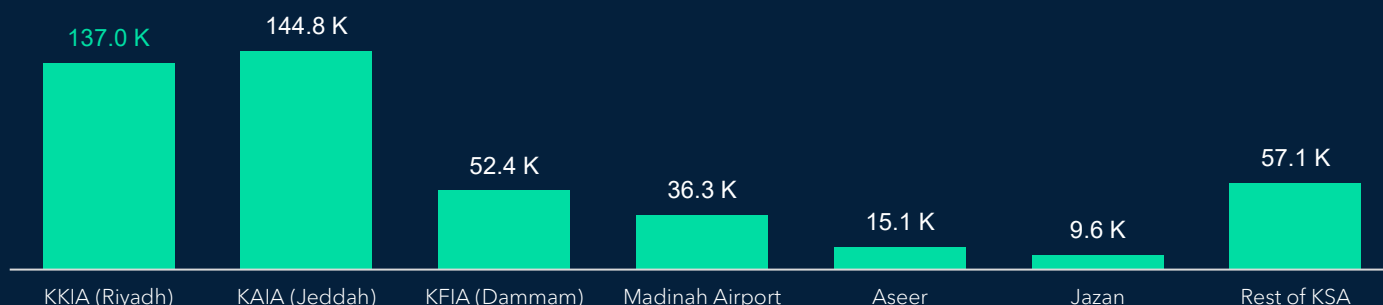
Riyadh's main airport, the King Khalid International Airport (KKIA), is KSA's second busiest airport in terms of flights and the second highest in terms of passengers served. With the ongoing airport expansion and impact of Riyadh Air, Riyadh is expected to be the busiest KSA airport.

Number of Passengers (Arrival, 2024)



Out of a total 64.8 million arriving passengers, **King Khalid International Airport** accounted for **29% of passengers**.

Number of Flights (Arrival, 2024)



Out of a total 452 K arriving flights, **King Khalid International Airport** accounted for **30% of flights**.

Source : GACA, TDF Analysis

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