

MADINAH



Destination Report

20
25

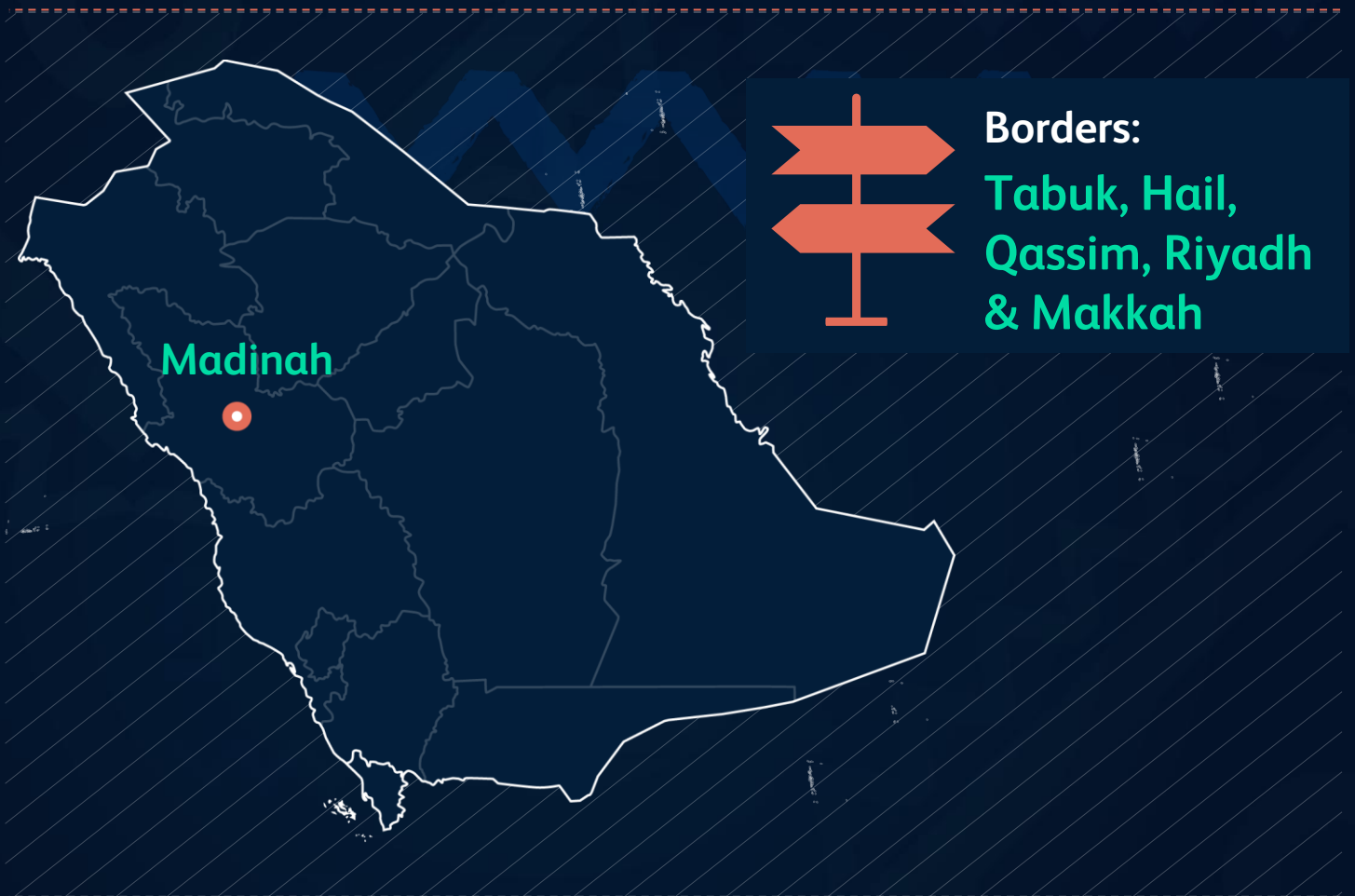
Tourism صندوق
Development التنمية
Fund السياحي



MADINAH

City of Spiritual Tranquility

Al Madinah Al Munawwarah is one of Islam's two holy cities, making it a key destination for millions of pilgrims traveling to Saudi Arabia for Hajj or Umrah. The city is centered around Al Masjid an Nabawi and is where the Prophet Muhammad (PBUH) lived and taught after the migration from Makkah in 622 A.D., called Hijrah, marking the start of the Islamic calendar. Due to the Islamic historical significance of the city, a trip to Madinah is a lifelong dream for many Muslims around the world.



Population 2022

1,477,047





Winter	8 - 26 ° C
Spring	18 - 41 ° C
Summer	26 - 45 ° C
Autumn	19 - 38 ° C

Best Times to Visit

Hajj Season

Varies every year

Ramadan Season

Varies every year

36%

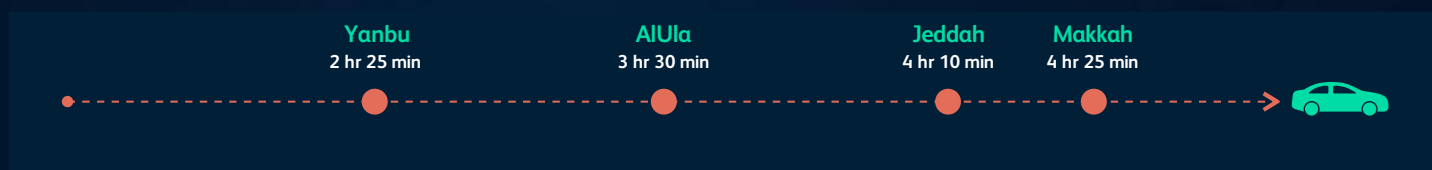
Ages < 30



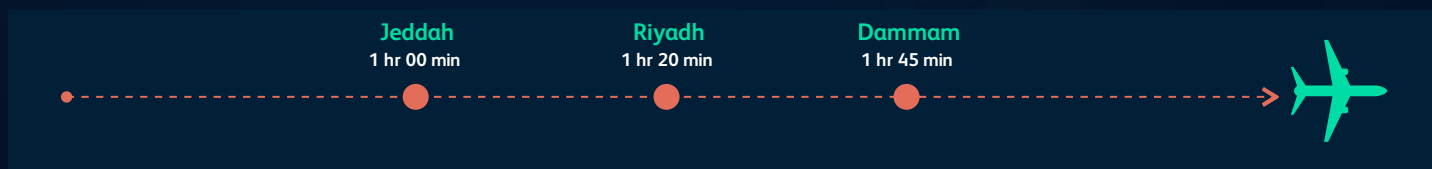
Proximity to Nearby Cities

Madinah has adequate transportation accessibility composed of roads connected to major highways and three international airports (Madinah city, Yanbu, AlUla). Additional transportation projects are being developed to improve accessibility and increase connectivity between Madinah with other cities.

Driving



Flying



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

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Key Highlights



01

The second holiest city in Islam provides Madinah with an existing flow of religious tourists and with Umrah capacity set to be increased from 37 Mn by 2030, which will lead to the transformation of Madinah.

02

Ongoing developments to leverage religious tourism flows to drive leisure tourism growth, which is already among the fastest-growing tourism segments for Madinah.

03

Diverse portfolio of unique cultural & historical assets and wide array of natural assets, from 300 km of Red Sea coastline, volcanoes, caves, and more.

04

Well developed road, air, and sea accessibility, with two international airports in Madinah and Yanbu (and a third in AlUla) and high connectivity through the Haramain Railway.

05

Opportunity to strengthen Yanbu's integration city into cruise industry highlighting its beaches, diving spots, fishing industry, and more.

06

Limited supply of entertainment offerings within the region is a significant opportunity for the sizeable local market and year-long flow of religious visitors.

07

Opportunity to develop unique entertainment offerings due to limited offerings despite modest population and tourism flows in Madinah and Yanbu.

08

Opportunity for mixed-use and quality retail offerings and retail landscape, currently limited to community malls & traditional local markets.

09

Limited offerings to cater to the fast-growing tourism segments, such as leisure in accommodation, F&B, retail, and entertainment and shift towards middle-income tourists.

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Tourism Landscape (2024)

01

Continued Visitor growth in 2024¹

Madinah visitors continued to grow in 2024 with 12% YoY increase and have almost reached pre-pandemic levels. Spend increased by 8% YoY and exceeded 2019 levels by 26%.

5.3Mn

Total Overnight Visits
in 2024

02

Domestic Visits and Spend Grew while Inbound Decreased

Madinah's domestic visitors and spending witnessed 13% & 15% YoY growth while inbound visits fell by 6%. Domestic dominates tourism flows due to Madinah being primarily a secondary visit destination for inbound travelers.

97%

Share for domestic
visitors of all Madinah's
visits

03

April, June, and November marked Peak Months

Madinah has relatively stable seasonality due to continuous flow of religious tourism, which usually includes Madinah as a secondary destination after Makkah.

30%

of visits occur in April,
June, and November

04

The Main Travel Purpose is Religious

Religious visitors are the main contributor to the tourism landscape accounting for 84% of total visits.

84%

of visits driven by
Religious

05

Families Make Up the Main Visitor Profile

Madinah is a largely family destination with the average party size of 3.2 to 3.7. Average length of stay for domestic visitors was much shorter than inbound.

3.2 – 3.7

Average party size in
2024

06

F&B, Transportation, and Accommodation

F&B, Transportation, and Accommodation were the top tourism spend segments accounting for 85% of total spend. Transportation was among the fastest growing segments in 2024.

85%

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

07

Bahrain, Egypt, and UAE Are the Top Source Markets

Bahrain accounted for 48% of total inbound visits, while Egypt and UAE accounted for 17% and 13%.

78%

of inbound visits from
Bahrain, Egypt, and
UAE

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

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Key Upcoming Projects

Non-Exhaustive



Rua Al Madinah

Rua Al Madinah is a PIF led project located within walking distance of key religious sites in AlMadinah and will feature 63% of open spaces. The project will be opened in phases with an announced 47,000 hotel keys.

Stage:	Execution
Value:	37,000Mn \$
Completion (estimate)	Q3 2030
Site Area BUA	1.5 Mn m2 4.9 Mn m2
Key Components	Hotels & Residential Retail and F&B



Knowledge Economic City

Knowledge Economic City Developers Company (KECD) is developing KEC with aims to attract information technology companies, education, and health centers.

Stage:	Execution
Value:	8,000Mn \$
Completion (estimate)	Q1 2029
Site Area	450K m2
Key Components	Residential Hospitality F&B, Retail



Madinah Metro

Madinah Municipality (MM) is planning to develop an 86km three-line metro system within Madinah city to improve traffic and connectivity.

Stage:	Design
Value:	5,000Mn \$
Completion (estimate)	Q4 2029
Site Area	86 Km
Key Components	Red Line Blue Line Green Line



Heart of Uhud

Al Mqr Development Company is developing a health resort called "Heart of Mount Uhud" with medical clinics, rehabilitation centers, and wellness offerings.

Stage:	Design
Value:	533Mn \$
Completion (estimate)	Q3 2028
Site Area	240,000 m2
Key Components	Medical/ F&B Hospitality

Source : Information gathered from TDF analysis, publicly available information, and third-party providers such as Global Data and information is subject to change

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Key Upcoming Projects

Non-Exhaustive



Meshraf Development

Al Mqr Development Company is developing a mixed-use project featuring residential, commercial, and public parks.

Stage:	Execution
Value:	387Mn \$
Completion (estimate)	Q4 2027
Site Area	700,000 m2
Key Components	Residential Commercial Public Parks



SEVEN Madinah

Saudi Entertainment Ventures Company (SEVEN) is planning to develop an entertainment complex in AlMadinah near King Fahd Central Park, featuring six distinct entertainment zones.

Stage:	Execution
Value:	346Mn \$
Site Area BUA	76,500 m2 84,000 m2
Key Components	Entertainment Retail F&B



Airport Expansion – Phase II

Saudi Arabian General Authority for Civil Aviation (GACA) is undertaking the second phase of the Madinah Airport expansion to increase passenger capacity from 8 million to 17 million.

Stage:	Execution
Value:	300Mn \$
Completion (estimate)	Q4 2027
Site Area	40,000 m2
Key Components	Terminal Expansion New Terminal

Value Proposition



Religion & Heritage

Home to the 2nd holiest city in Islam, Madinah is home to many important religious sites, historical & cultural sites, and is a dream destination for around 2 billion Muslims globally. The Haramain High-Speed Rail Project also provides connectivity to Jeddah, Makkah, and KAEC.



Recreation

The region has diverse landscapes that provide ample opportunities for recreation, such as diving in the Red Sea near Yanbu, beautiful beaches for water-activities, local farms, and traditional souqs & bazaars near unique sites.



Nature

The region's mixed topography includes caves, mountains, beaches, and volcanoes making it appealing for hiking, sight-seeing, and nature lovers. The region is also famous for its large date farms and other local produce.

Source : MT, TDF analysis

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Religion & Heritage

Non-Exhaustive

Madinah is the second holiest city in Islam, home to the Prophet's Mosque, as well as other religious and historic sites. It also hosts numerous museums and historical monuments.



Al Masjid An Nabawi

Second holiest site in Islam drawing millions of visitors annually. The mosque lies in the center of the city of Madinah and dominates the urban landscape of the city, which is built around it in a set of concentric roads.



Quba Mosque

Considered the first mosque in Islam and was built after the hijrah was completed by the Prophet (PBUH) and his followers from Makkah to Madinah in 622 AD. The mosque is the top attraction for visitors after the Prophet's Mosque and is often a stop on the Hajj and Umrah pilgrimages.



Mount Uhud

Mountain located to the north of the city of Madinah, standing over 1,000m tall and 7.5km wide. The land around Uhud was the site of the second great battle between the Muslims and Quraish in the early 7th century and was the site of their first defeat.



Dar Al Madinah Museum

Dar Al Madinah is a museum that showcases over 2,000 heritage and historical exhibits, including the evolution of Al Masjid an Nabawi over the years. The museum also features the Hejaz Railway exhibit, which commemorates its historical significance and the vital role it once played in serving pilgrims traveling to the holy sites.

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

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Recreation

Non-Exhaustive

Diverse landscapes provide opportunities for recreation, such as diving in the Red Sea, a buzzing traditional retail scene, various parks to enjoy a stroll, and touring date farms.



Red Sea Diving and Water Activities

Yanbu is home to majestic marine life and a lively diving community. Even in winter, the water does not fall below 20 degrees Celsius. Within it lies the Seven Sisters Coral Reef, Abu Galawa island with nearby coral grottoes, sharks, and a wide variety of above-water bird-watching and fishing activities at Yanbu Waterfront.



Ras Al Abyad Beach

The Ras Al Abyad Beach (Coastal White Head) is located two hours away from AlMadinah and is known for its pristine beaches. The beach was one of the main destinations for people that were on the luxurious Red Sea Silver Spirit Cruise. There is ample opportunity to provide new beach and water activities (water sports, boat tours, diving, etc.)



Date Farms

Madinah is famous for its dates, and its date farms produce large volumes and many varieties of products that are sold in local markets. They are also known for their culinary delights that incorporate products, such as dates and mint.

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Nature

Non-Exhaustive

Mixed topography such as caves, mountains, beaches, and volcanoes makes it attractive for hiking, sight-seeing, and nature lovers.



Harrat Khaybar

Volcanic field north of Madinah known for its marvelous black dry lava formations on the ground and unique topography. It covers an area of 12,000 km² and includes several sites such as Ras Al Abyad Mountain and Umm Jersan Cave.



Al Wahbah Volcanic Crater

A 4km wide and 250-meter-deep crater with an opaque lake in its center about a 3 hour drive from Madinah. Its lunarlike landscape offers a near-otherworldly experience and spectacular views. The almost non-existent light pollution also makes it an ideal spot for stargazing.



Radwa Mount

Located in Yanbu, Radwa Mount is a colossal icon that stands 2,282 meters tall. Its jagged peaks and unique red color have inspired many Arabic poets. It's located in the AlNakhil range, which is known for its honey and wildlife, including wolves, lynx, tigers, and ibex.



Harrat Rahat

The largest volcanic field in the Kingdom, covering an area of 20,000 km², and is about two and a half-hour drive away from Madinah. It extends from Madinah to Makkah and is home to +500 individual volcanoes. The last known eruption occurred is estimated to have occurred in the year 1256.

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

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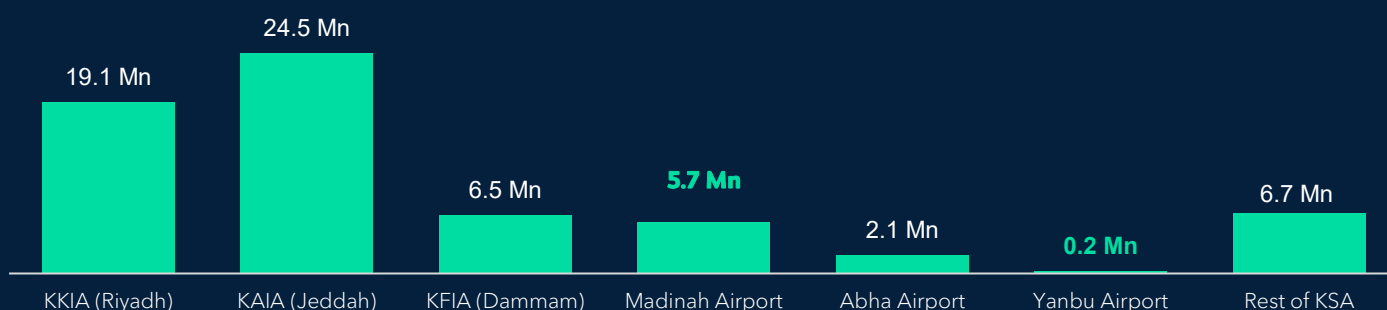


Connectivity

Air Transport

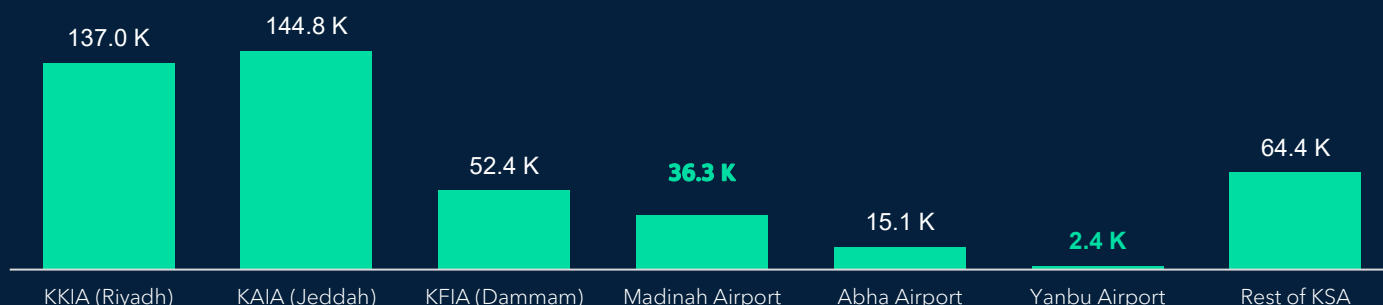
Al Madinah Al Munawwarah region is served by three international airports around Al Madinah City, Yanbu, and AlUla. The Prince Mohammed Bin Abdulaziz International Airport (Madinah Airport) is expected to increase annual capacity through its upcoming expansion project.

Number of Passengers (Arrival, 2024)



Out of a total 64.8 million arriving passengers, Madinah Airport accounts for approximately 9% of all passengers.

Number of Flights (Arrival, 2024)



Out of a total 452 K arriving flights, Madinah Airport accounted for 8% of total flights.

Source : GACA, TDF Analysis

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