

# MAKKAH



## Destination Report

20  
25

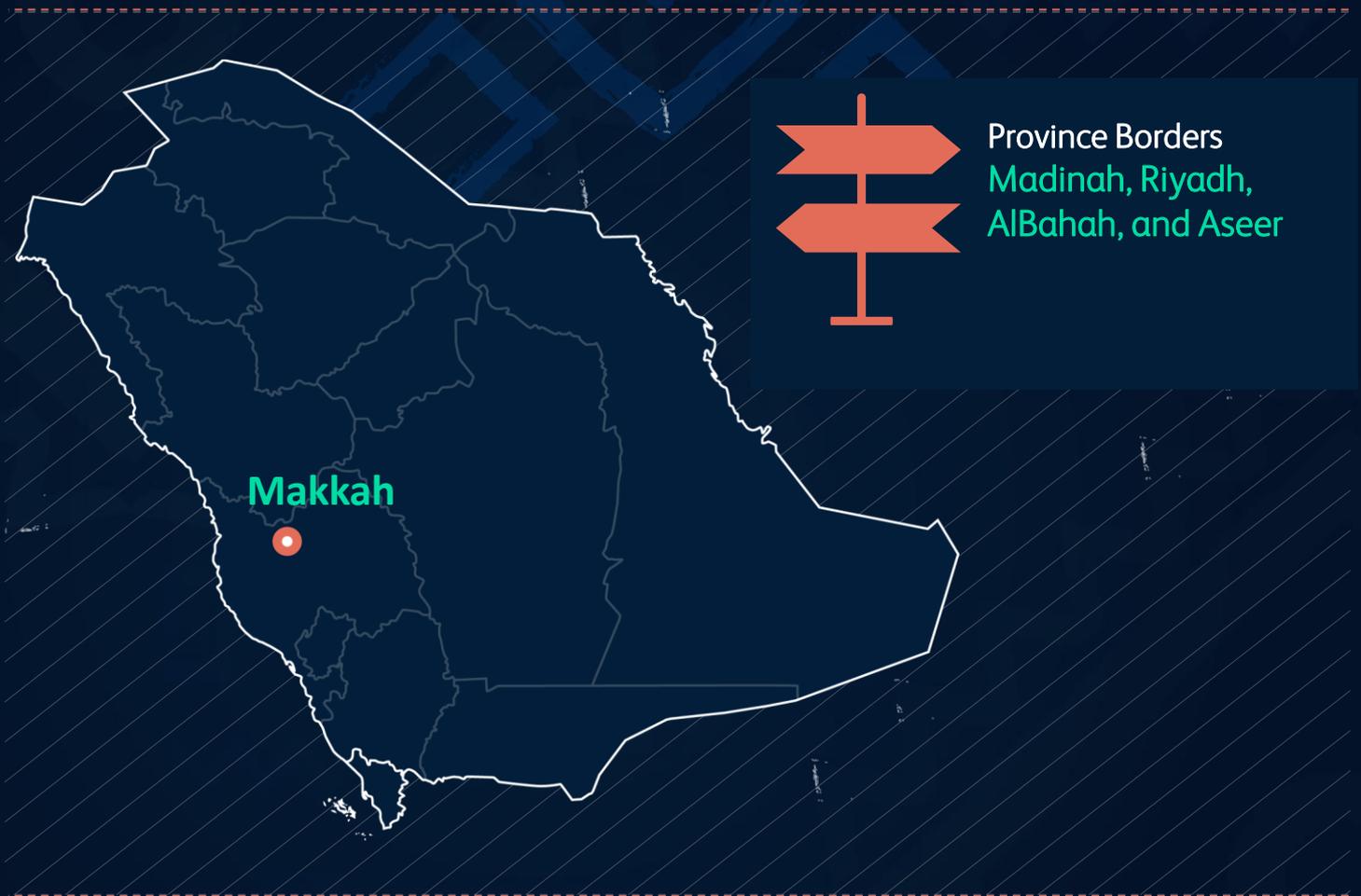
Tourism صندوق  
Development التنمية  
Fund السياحي



# Makkah

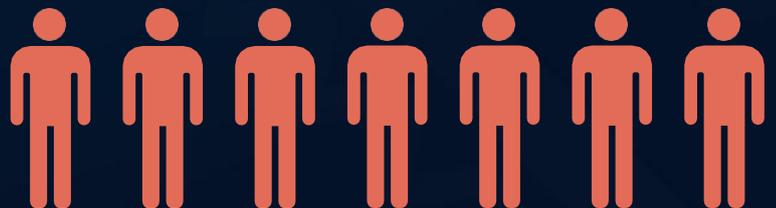
## The Soul of Spirituality

Makkah is revered as Islam's holiest city, where millions of Muslims visit to perform Umrah and Hajj every year. It is located in the Western region of KSA nearby Jeddah, and features a rich history as the birthplace of Islam and home to the "Kaaba," where Muslims worldwide face during their five daily prayers. It also served as a hub of trade due to its strategic location, connecting the Mediterranean world with Africa and Asia. Its markets were melting pots where diverse cultures converged and exchanged ideas and goods.



Population 2022

2,427,924





Winter	14 - 23 ° C
Spring	18 - 41 ° C
Summer	24 - 43 ° C
Autumn	21 - 39 ° C

## Best Times to Visit

### Hajj Season\*

June to July

### Ramadan Season\*

March to April

# 49%

## Ages < 30



## Proximity to Nearby Cities

Makkah is within a 1-hour drive from one of the busiest international airports in KSA, the King Abdulaziz International Airport (KAIA) in Jeddah, with ongoing expansions underway. The Haramain Railway also is a key enabler of access to Makkah, providing trips connecting Makkah with Madinah, KAEC, and Jeddah.

### Driving



### Haramain Railway Stations



Source : Ministry of Tourism, GASTAT, Visit Saudi, TDF Analysis \* Timings change annually due to Islamic calendar calendar

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# Key Highlights

01

**Home to a population of +2.4 million** with a relatively young population with residents from different cultures.

02

**Continuous influx of +15 Mn Pilgrims** arriving every year for Umrah and Hajj providing steady and growing supply of demand and opportunity to convert to leisure & other purposes.

03

**High accessibility by air and land** through the worldclass King Abdulaziz International Airport (KAIA) the Haramain Railway, and by road.

04

Has the **highest concentration of hotel keys** in the Kingdom to accommodate the high number of international religious tourists with strong hotel performance.

05

Multiple **ongoing expansions, programs, and projects** to increase capacity, accessibility, and enhance the visitor journey and a key part of Vision 2030 such as through the **Pilgrim Experience Program**.

06

Diverse and **rich natural landscape** and large inventory of cultural & historical assets with opportunity to develop truly unique offerings.

07

Well developed infrastructure, market size, and **maturity of destination** makes it easier to attract investment.

08

Investment reforms and regulatory changes are making it easier to invest in Makkah, presenting attractive investment opportunities.

09

Foreign ownership rights in Makkah are reshaping the investment landscape and creating a more accessible, opportunity-rich environment for investors.

Source: MT, TDF analysis

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# Tourism Landscape (2024)

01

## Continued Positive Momentum for Makkah

Makkah visitors and spend had increased YoY by **13% and 24%** respectively and remains well above 2019 levels.

**25.8** Mn

Total Overnight Visits in 2024

02

## Inbound Growth Outpaces Domestic

Makkah's inbound segment accounted for 68% of total visits and grew YoY in visits and spend by **13% and 26%** respectively, driven by growth in religious travelers.

**26%** %

Inbound spend growth YoY

03

## Seasonality led by Religious Travel

Makkah enjoys steady seasonality driven by Umrah travel, which peaks during Ramadan and the months prior/after Hajj as inbound travel flows change to accommodate the high influx of Hajj travelers.

**25** %

of visits occur in March and June

04

## Religious is the dominant main Travel Purpose

**Religious** visitors are the main travel purpose accounting for roughly three-fourths of visits and spend.

**75** %

of all visits driven by Religious

05

## \*Umrah soars in 2024

**Umrah** pilgrims soared in 2024 increasing **12%** to reach **17.5 Mn** pilgrims driven by increase in capacity and accessibility, such as Grand Mosque expansions and increased capacity of Haramain Train.

**17.5** Mn

Umrah pilgrims in 2024

# Key Upcoming Projects

Non-Exhaustive



## Transportation Program

Royal Commission for Makkah City & Holy Sites (RCMC) is developing the Makkah Public Transportation program consisting of Makkah metro (4 lines) and supporting infrastructure.

Stage:	Execution
Value:	\$ 17,000 Mn
Completion (estimate)	Q4 2030
Key Components	Metro (4 lines)



## Masar

Umm Al Qura for Development & Construction Company developing a mixed-use development in Makkah featuring several hotel offerings, public plazas, and retail and shopping centers.

Stage:	Execution
Value:	\$ 6,500 Mn
Completion (estimate)	Q4 2028
Site Area BUA	26,324 m2 310,000 m2
Key Components	Hospitality Residential Retail & Shopping



## Grand Mosque Expansion

The ongoing expansion aims to increase total pilgrim capacity as well as enhancing pilgrim facilities, accessibility, safety, and enhance pilgrim experience.

Stage:	Execution
Value:	\$ 708 Mn
Completion (estimate)	Q2 2026
Site Area	300,000 m2

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# Key Upcoming Projects

Non-Exhaustive



## Transit Oriented Development

Saudi Arabia State Properties General Authority (SPGA) is planning to construct a mixed-use development featuring a bus terminal in Al Hajlah District.

Stage:	Pre-Tender
Value:	\$ 400 Mn
Completion (estimate)	Q4 2029
Site Area	67,600 m2
GFA	281,702 m2
Key Components	Hotel Retail & Lifestyle Bus Terminal



## King Salman Gate

A transformative mixed-use development launched in Makkah. Developed by RUA AlHaram AlMakki Company

GFA:  
12,000,000  
m2

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# Value Proposition



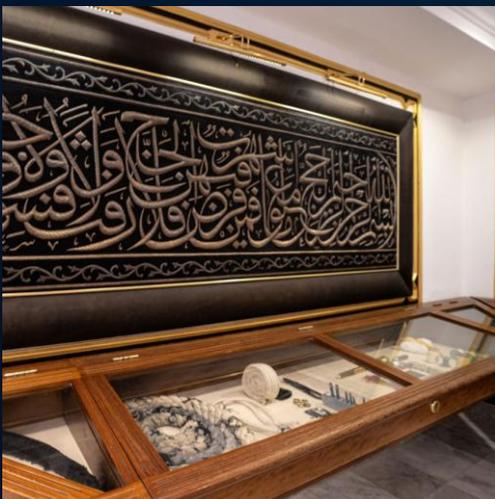
## Religious

Makkah is revered as Islam's holiest city, where millions of Muslims visit to perform Umrah and Hajj every year. It features a rich history as the birthplace of Islam and home to the "Kaaba," where Muslims worldwide face during their five daily prayers. It is home Al Masjed Al Haram, a sacred place among billions of Muslims that is also the largest mosque in the world.



## Historical & Enrichment

Makkah is a city shaped by a long and distinctive history, reflected in its landmarks and ongoing development. The city is rich in mosques, historical assets and museums showcasing Islamic heritage.



## Cultural

Makkah has a rich history given its religious significance and its role as an ancient trading hub. Different cultures often exchanged ideas and goods over thousands of years.

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### Al Masjid Al Haram & the Kaaba

Al Masjid Al Haram in Makkah holds a sacred place in the hearts of over **two billion** Muslims around the world. At its center stands the revered Kaaba, the Qiblah toward which Muslims face in prayer. This spiritual sanctuary has been a focal point of devotion since the earliest days of humanity, **drawing millions each year** who come to perform Hajj, Umrah, and daily prayers.



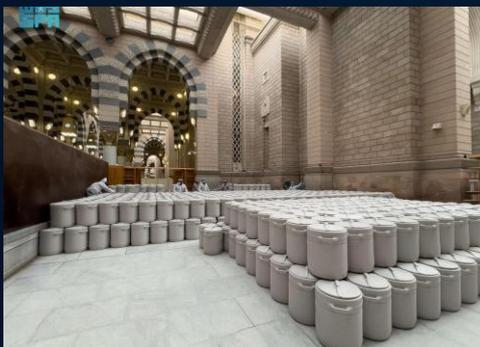
### Hajj & Umrah

Each year, **over 15 million Muslims** from around 180 countries travel to the holy city of Makkah to perform Hajj or Umrah. Hajj is an obligatory act of worship for physically and financially able Muslims and takes place during specific dates. Umrah, often referred to as the "lesser pilgrimage," can be performed at any time of the year and is highly recommended, though not mandatory, and attracts tens of millions of pilgrims per year.



### Masjid Al-Taneem

Masjid al-Taneem is considered one of the most important Islamic landmarks in Makkah and is also called the mosque of the Mother of Believers Aisha Bint Abu Bakr – May Allah Be Pleased with Them – because she prayed and performed Ihram there in the Farewell Pilgrimage. It is distinguished by its modern Islamic architectural style mixed with historical authenticity and exquisite decorations.



### Zamzam Well

According to Islamic tradition, the Zamzam spring appeared miraculously under Ismail's feet. Today, the well lies beneath the mosque's floor and provides purified water through thousands of taps and containers throughout the mosque complex. The sacred Zamzam water holds a great significance for Muslims.

# Historical & Enrichment

Non-Exhaustive



## Makkah Museum

Housed in the beautifully restored Al Zaher Palace, once a royal residence, the Makkah Museum invites visitors to discover exhibitions that explore the rich history of Makkah, the early rise of Islam, and Saudi Arabia's archaeological heritage. This architectural gem serves as a stunning example of traditional Islamic design, with intricate details that reflect the spiritual and cultural essence of the region.



## Ain Zubaidah

Ain Zubaidah is a great archeological site of wonderful geometric design in Makkah. It reflects great care for pilgrims throughout history, as it is the oldest network used for providing pilgrims and travelers with water for 1200 years.



## Institute of manuscripts and Islamic heritage

The Center of Islamic Heritage Revival was founded by Umm Al-Qura University in 1396 AH. Early on, the center successfully gathered significant Islamic manuscripts from different regions of the world

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### Hira Cultural District

A significant cultural and tourist attraction located next to Jabal Al-Nour, home of Hira Cave. It tells the story of the divine revelation and offers insights into the historical importance of the mountain and the cave. Hira Cultural District enriches visitors' cultural and educational experiences through its diverse facilities.



### King Abdulaziz Complex for the Holy Kaaba Kiswa

This world-renowned facility is dedicated to producing the Kiswa, the intricate black silk covering of the Holy Kaaba, adorned with Quranic verses embroidered in gold-plated thread. Over 200 skilled artisans work across departments including machine and hand embroidery, silk weaving, gold threadwork, printing, and final assembly.



### Clock Tower Museum

In a unique experience that blends science and faith, The museum features four interactive floors showcasing the latest visual and auditory technologies, with captivating astronomical displays that simulate the movement of planets and stars



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