

EASTERN



Destination Report

20
25

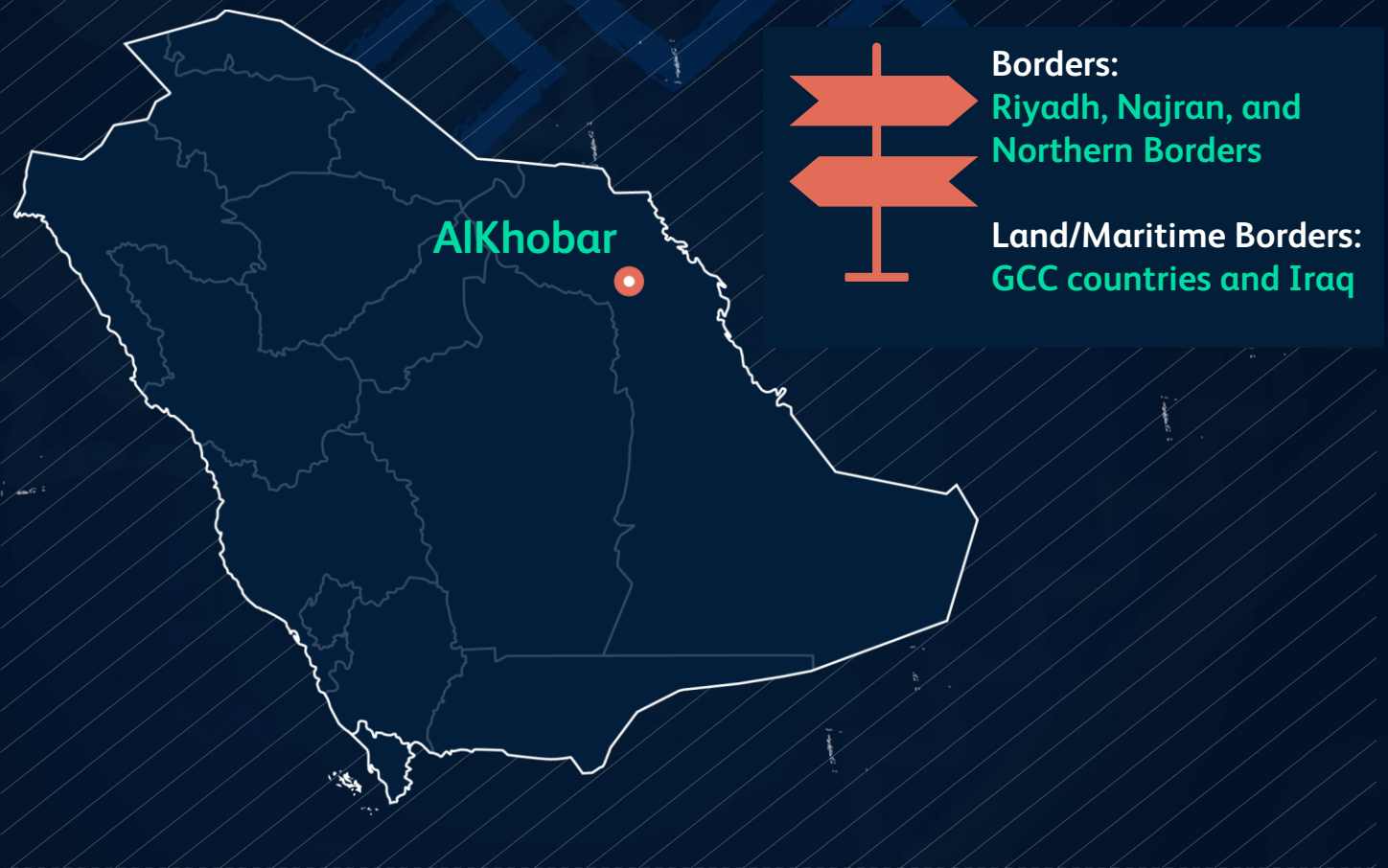
Tourism صندوق
Development التنمية
Fund السياحي



Eastern Province

Historic KSA Powerhouse

The Eastern Province is the largest in Saudi Arabia by land area and a strategically vital region, serving as the Kingdom's primary source of oil reserves. Its proximity to Riyadh and neighboring GCC countries like Kuwait, Bahrain, Qatar, the UAE, and Oman has fostered a well-developed road network and excellent accessibility. The province boasts abundant and diverse cultural, heritage, and natural assets, making it a prominent hub for business tourism and visits to friends and relatives (VFR), while its leisure tourism segment continues to grow.



Population 2022

5,125,254





Winter	9 - 24 ° C
Spring	15 - 38 ° C
Summer	26 - 45 ° C
Autumn	21 - 38 ° C

Best Times to Visit

Winter Season

December to January

Summer Season

May to August

33%

Ages < 30



Proximity to Nearby Cities

The Eastern Province benefits from its close proximity to several GCC countries. In addition to the King Fahd Causeway, which links the region to Bahrain, it is also home to a world-class international airport.

Driving

Riyadh
4 hr 00 min

Qatar
4 hr 05 min

Kuwait
5 hr 00 min

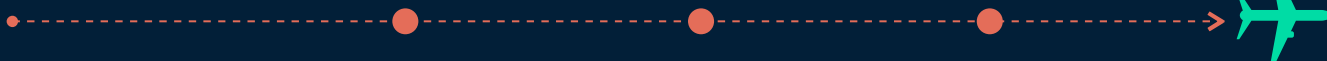


Flying

Riyadh
1 hr 05 min

Madinah
2 hr 00 min

Jeddah
2 hr 10 min



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

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Key Highlights



01

A population of +5 million and a relatively well-educated workforce, the region holds strong potential for tourism, both in terms of labor availability and market demand.

02

High accessibility by air, land, and sea and home to KSA's 3rd busiest airport, the King Fahd Causeway, and infrastructure.

03

Less than 500 km from several GCC countries (Qatar, UAE, Bahrain, and Kuwait), the region attracts a significant share of its inbound tourism from GCC.

04

Diverse and rich natural landscapes, complemented by a variety of cultural and historical assets, with significant opportunities to leverage the coastline and deserts to create distinctive resorts, entertainment venues, and recreational experiences.

05

370km of Arabian Gulf coastline with prime opportunities to develop world-class beach resorts, distinctive F&B concepts, curated retail experiences, and vibrant entertainment destinations across multiple beachfront locations.

06

Opportunity to expand portfolio of entertainment events & festivals.

07

Opportunity to strengthen value proposition and develop cruise-related offerings.

08

Gateway to KSA's Oil & Gas sector and has four major seaports that play a key role in the oil industry and KSA's imports/exports.

09

Its well-developed infrastructure, market size, and maturity of destination makes it easier to attract investment.

Source : MT, TDF analysis

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Tourism Landscape (2024)

01

Visits more than doubled since 2019 and decreased in 2024

Eastern Province visits remain 151% higher than 2019 but slightly decreased in 2024 by 3% compared to 2023 driven by a drop in inbound visits.

18.6Mn

Total Overnight Visits
in 2024

02

Domestic Growth Outpaces Inbound

Domestic visits, which account for almost three quarters of total visits, remain a source of resiliency for Eastern Province.

73%

Of visits from
Domestic

03

Steady Seasonality throughout the year

Eastern Province enjoyed mainly steady seasonality among both domestic and inbound tourists, illustrating that it has a relatively balanced variety of tourism flows spread out throughout the year.

29%

of visits occur in Jan,
Feb and June

04

Leisure Decreased for both domestic and inbound

VFR visitors have been a key growth driver for inbound visitors, but it faced a slight drop in 2024, Leisure is the key growth for domestic visitors but suffered a -16% drop YoY.

81%

of all visits driven by
Leisure & VFR

05

Families make up the main visitor profile

Eastern Province is a largely family destination among both domestic and inbound visitors, with average length of stay ranging from 6.0 to 5.3 nights.

3.2 – 3.3

Average Party Size

06

F&B, Transportation, and Accommodation

F&B, Transportation, and Accommodation were the top tourism spend segments, accounting for 74% of total spend.

74%

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

07

Bahrain, Kuwait, and Qatar Top Source Markets

Bahrain accounted for 31% of total inbound visits, while Kuwait and Qatar accounted for 30% and 17%.

78%

of inbound visits from
Bahrain, Kuwait, and
Qatar

Source Ministry of Tourism, TDF Analysis

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Key Upcoming Projects

Non-Exhaustive



Heart of Khobar

Tilal Real Estate Company is undertaking the construction of a mixed-use development named "Heart of Khobar" in Al Rawabi neighborhood across three phases.

Stage:	Design
Value:	1,600Mn \$
Completion (estimate)	Q2 2029
Site Area	268,000 m2
Key Components	Hotels & Residential Office & Retail Entertainment



Ajdan Waterfront

Al Oula Real Estate Dev. Company and Ajdan Real Estate Development are constructing a mixed-use project along AlKhobar corniche. It includes: Ajdan Rise, Ajdan Walk, Boulevard Ajdan, and other elements.

Stage:	Execution
Value:	250Mn \$
Completion (estimate)	Q3 2026
Site Area	450,000 m2
Key Components	Residential Towers Retail village & hotel F&B, Recreation



The Rig

Developed by the Oil Park Development Company (OPDC), The Rig, is an adrenaline-junkie's dream. the epic offshore destination is an extreme park offering air & sea sports activities across a multi-story offshore platform.

Stage:	Announced
Value:	650Mn \$
Completion (estimate)	Q2 2027
Site Area	300,000 m2
Key Components	Amusement Park Hotels F&B, Retail Water Activities



The Avenues - Khobar

Shomoul Holding is developing a mixed-use project which includes a shopping mall, 244-key Four Seasons hotel, entertainment, residential, offices and associated facilities. Located in northwestern corner of the intersection of King Saud Road & Prince Sultan Road.

Stage:	Execution
Value:	1,865Mn \$
Completion (estimate)	Q4 2027
Site Area	198,000 m2
BUA	696,000 m2
Key Components	Hotels & Residential Shopping Mall Entertainment

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



SAUDI
ENTERTAINMENT
VENTURES

SEVEN Dammam

Saudi Entertainment Ventures Company (SEVEN) is planning to develop an entertainment complex in Dammam. It is planned to be built on reclaimed land on Dammam waterfront with a water park.

Stage:	Execution
Value:	760Mn \$
Completion (estimate)	Q3 2027
Site Area	360,000 m2
Key Components	Amusement Park Live Entertainment F&B, Retail



SAUDI
ENTERTAINMENT
VENTURES

SEVEN AlKhobar

Saudi Entertainment Ventures Company (SEVEN) is planning to develop an entertainment complex in Al Khobar. It is planned to be built on reclaimed land on Al Khobar waterfront with a water park in the Al Bahar Area, North of the city.

Stage:	Execution
Value:	650Mn \$
Completion (estimate)	Q2 2027
Site Area	300,000 m2
Key Components	Amusement Park Live Entertainment F&B, Retail



Al Othaim Park

Al Othaim Investment Company is developing a mixed-use project including a 140K sqm GLA mall, residential towers, office and hotel components in Dammam.

Stage:	Execution
Value:	363Mn \$
Completion (estimate)	Q4 2028
Site Area	224,000 m2
Key Components	140K GLA Mall Residential & Office Hotel



Saudi Land Bridge

The Saudi Land Bridge one of the largest infrastructure projects in KSA. Planned to link Jeddah, Riyadh, Dammam, and Jubail together.

Stage:	Design
Value:	7,000Mn \$
Completion (estimate)	Q4 2028
Key Components	1,472km railway

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Key Upcoming Projects

Non-Exhaustive



Aramco Stadium

Saudi Aramco and ROSHN to construct a football stadium in North AlKhobar with +46K seat capacity, in preparation for the 2027 Asian Football Confederation (AFC) Cup and the FIFA World Cup 2034.

Stage:	Execution
Value:	1,110Mn \$
Completion (estimate)	Q1 2027
Site Area	800,000 m2
Key Components	+46K seat capacity Hotels Support facilities



Adel City Dammam

Areeb Capital is planning to undertake the construction of a mixed-use project named "Adel City" spanning over 32 million sqm of land in Al-Naseem District, along King Faisal Coastal Road in Dammam.

Stage:	Execution
Value:	1,000Mn \$
Completion (estimate)	Q2 2030
Site Area	32 km2
Key Components	Residential & Hotels Offices & Retail F&B and Leisure



Half Moon Beach

A mixed-use resort planned to be built in Al Khobar on Half Moon Beach with hospitality, residential, F&B, and other amenities.

Stage:	Announced
Value:	372Mn \$
Completion (estimate)	Q2 2030
Site Area	262,000 m2
Key Components	Hotels Residential F&B and Leisure

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Value Proposition



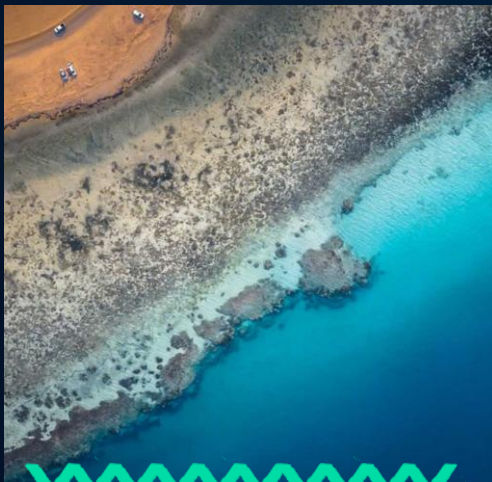
Culture & Heritage

The region's rich and cultured history makes it a key cultural center for KSA. There are several museums, historical assets, and culture-oriented activities such as the world-class "Ithra" museum that showcase the history and culture of the region that is home to KSA's oil reserves.



Entertainment & Recreation

Entertainment is a pillar of the tourism agenda for the region with high potential to leverage EP's competitive advantages. Festivals, events, retail, F&B, and other recreation-related family-friendly activities and offerings set to drive leisure tourism growth in the region.



Nature and Sun & Sea

Eastern Province has a rich diversity of natural assets such as 370km of Arabian Gulf coastline, the Empty Quarter, and more that can attract beach-goers and adventure-seekers alike.

Source: MT, TDF analysis

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Culture & Heritage & Arts

Non-Exhaustive

The region's rich and cultured history makes it a key cultural center for KSA. There are several museums, historical assets, and culture-oriented activities that the region can leverage. Sites such as the world-class "Ithra" museum provide multiple options to explore the history and culture of the region home to KSA's oil reserves.



Ithra Cultural Center

Built close to where oil was first discovered, the King Abdulaziz Center for World Culture, "Ithra" is a world-class cultural center and museum. Spanning over 80,000 square meters, it includes a library, a theater, a cinema, an ideas lab, and knowledge tower which is a highly visited attraction for families and tourists alike.



Tarout Castle

A trio of towers on top of a hill on an island that are thought to date back to 5,000 B.C. and were once part of a regional stronghold and civilization that ruled one of Arabia's trade routes.



Saudi Film Festival

Launched by the Saudi Arabian Society for Culture and Arts in partnership with the King Abdulaziz Center for World Culture (Ithra), the Saudi Film Festival is a non-profit initiative to support emerging artists and showcase cultural and artistic films.



Heritage Village

Part museum, part restaurant, Dammam's turret-topped Heritage Village gives visitors a glimpse into a simpler life. The five-story building houses a museum, where troves of jewelry, manuscripts, fabrics, and other artifacts are on display, as well as a craft market where Arabic perfumes, incense, baskets and wall hangings are sold.

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

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Entertainment & Recreation

Non-Exhaustive

Entertainment is a pillar of the tourism agenda for the region with high potential to leverage EP's competitive advantages. The province is ramping up its calendar of festivals and events while looking to expand its retail and F&B offerings to attract leisure tourists.



Khobar Waterfront & Dammam Corniche

A family-favorite, the Khobar waterfront has dancing fountains and landscaped gardens across the coast with views of the King Fahd Causeway and historic water tower with several coffee shops and activities. Dammam Corniche is a popular attraction for a stroll with restaurants, cafés, and family-friendly entertainment.



Shopping

With atmospheric shopping experiences such as the Share Al Hob market, Dammam Souk, and a host of modern super-regional shopping centers with dining areas and amusement parks, Dammam and AlKhobar offer a variety of coastal and urban shopping experiences as well.



Musical & Sports Events

Dammam has begun increasing the number of musical and sporting events to attract domestic and inbound tourists. It previously held a Red Bull Air Race and Formula 1 H2O Powerboat race during Yalla Sharqiah Season, and is exploring new entertainment activities & concerts.



SCITECH Museum

Al Khobar's Science and Technology Centre (SCITECH) is home to interactive and immersive exhibits related to space, sea life, life sciences, technology, and more. The museum also features an Observatory with a telescope to explore the stars.

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Nature and Sun & Sea

Non-Exhaustive

The Eastern Province's pristine beaches along the Arabian Gulf and large desert landscapes make it a key destination for nature-lovers and beach-goers. There are numerous water-based activities and desert camping activities to delight adventure-seekers and those looking for outdoor recreation.



The Empty Quarter

The Empty Quarter, one of the largest uninterrupted deserts in the world, sparsely populated and has become an attraction for adventurous travelers. It occupies 25% of KSA's total land mass, where wind formed and shaped their iconic sand dunes and temperatures averaged between 41C to 51C. It is one of the world's most oil-rich regions.



Half Moon Beach

Located near Khobar, Half Moon Beach is a popular area for many people, with its average depth of ~22 feet serving as a great place for beginner scuba divers. Named for its distinctive curved shape resembling a crescent moon, the area features cafes, water-activities, and resorts.



Ras Tanura Beach

Beautiful white sand beach decorated with palm trees and is popular among tourists and locals providing family-friendly activities, biking, and other recreational activities.



Outdoor Recreational Activities

The Eastern Province has several outdoor recreational activities to take advantage of its coastline and desert landscapes, ranging from water-sports to camping & star-gazing.

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

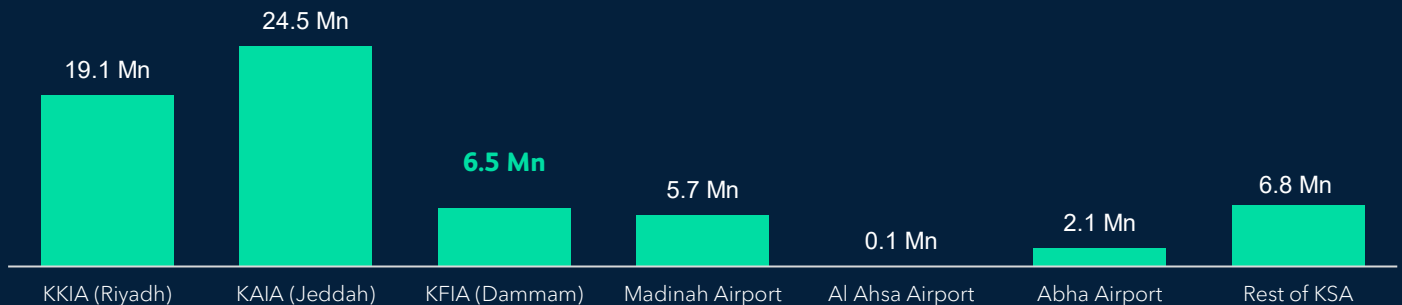
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Connectivity Air Transport

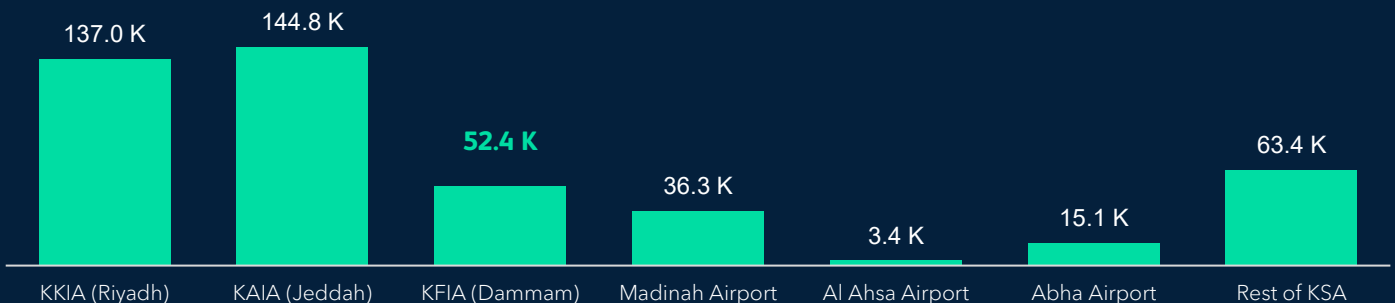
The King Fahd International Airport (KFIA) is the Kingdom's third most active airport by number of passengers & flights, while Al-Ahsa International Airport remains comparatively a smaller airport. The majority of inbound visitors are from GCC, which mostly come through land travel rather than air.

Number of Passengers (Arrival, 2024)



Out of a total 64.8 million arriving passengers, KFIA accounts for approximately 10% of all passengers.

Number of Flights (Arrival, 2024)



Out of a total 452 K arriving flights, KFIA accounted for 12% of total flights.

Source : GACA, TDF Analysis

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