



Destination Report

20
25

Tourism صندوق
Development التنمية
Fund السياحي



ASEER

Land of Cloud

Located in the southwestern end of the Kingdom, the mountainous region of Aseer is one of the prominent tourist destinations in Saudi Arabia thanks to its diversified natural assets, wide collection of heritage and cultural assets, temperate climate, and tourism attractions. Many come to enjoy the cooler weather and to explore the unique heritage of Rijal Alma'a and Al Habala village, and to visit the regions natural parks. Many seasonal events such as the AISoudah Festival, Abha Festival, Winter Snowfall, and purple Jacaranda Tree blossom help bring the region to life and attract tourists locally and globally.



Population 2022

2,024,285





Average Temperature **12 - 27 ° C**

Temperate climate which is 10⁰ C cooler than the rest of KSA.

36%

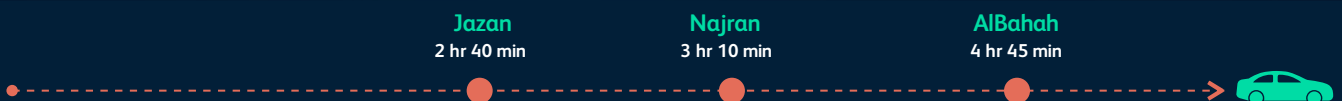
Ages < 30



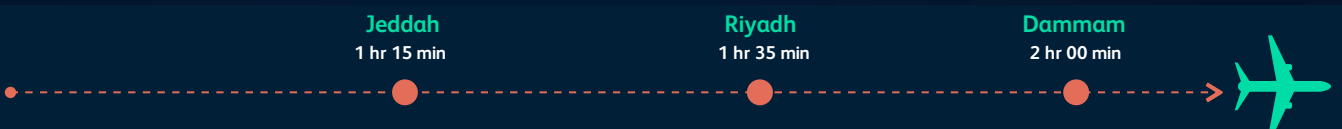
Proximity to Nearby Cities

There are many infrastructure projects in the region, including the expansion of Abha Airport to upgrade air connectivity. Additional projects are also planned and underway to better connect Aseer with other regions by road, such as the proposed routes to Jeddah, Jazan, and Taif, along with road projects within the region to link tourism destinations and cities.

Driving



Flying



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

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information



Key Highlights



01

Temperate climate that is on average 10 degrees cooler than the rest of the Kingdom.

02

Aseer is among the most visited destinations in the Kingdom for tourism and is one of the top local leisure destinations.

03

Diverse and rich natural assets with 5 unique landscapes, offering an opportunity to develop unique offerings that leverage Aseer's natural assets.

04

Large inventory of historical and cultural assets, including a UNESCO-certified asset "Rijal Alma'a".

05

Tourism is a strategic priority for the region and there is an existing tourism master plan including well-defined tourism development areas.

06

High accessibility by land and air from other cities through Aseer's domestic and international airport and roads. Large projects are underway to increase airport capacity as well.

07

Opportunity to attract private sector investments due to Aseer's maturity compared to other developing cities.

08

Opportunity to develop and enhance mid & premium amenities for F&B, retail, and entertainment.

09

High proportion of youth can serve as a potential tourism workforce.

Source : MT, TDF analysis

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information

Tourism Landscape

01

One of the Top Emerging Tourism Destinations¹

Aseer recorded an impressive 7.5Mn overnight stays, 51% higher than in 2019, while YoY overnight visits rose by 6% and spend decreased by 12%.

7.5Mn

Total Overnight Visits
in 2024

02

Domestic Dominates while Inbound is Growing

Aseer remains a largely domestic destination with domestic visits accounting for 98% of the total. However, inbound spend increased almost 3X since 2019.

51%

Growth in visits since
2019

03

Seasonal Summer Destination

Aseer is considered a seasonal destination with 35% of visits assuring during the peak months of June and July as domestic tourists seek cooler weather.

35%

of visits occur in June
& July

04

Leisure & VFR are main Travel Purpose

Leisure visitors have been the main growth driver and accounted for 43% of total visits, while VFR accounted for 44%.

87%

of visits driven by
Leisure & VFR

05

Families make up the main visitor profile

Aseer is a largely family destination with the average party size of 3.1 – 3.5 staying for 8.4 ~19.0 nights.

3.1 – 3.5

Average Party Size
2024

06

F&B, Transportation, and Accommodation

F&B, Transportation, and Accommodation were the top tourism spend segments accounting for 87% of total spend. F&B and Transportation were among the fastest growing segments in 2024.

87%

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

07

Bahrain, Egypt, and UAE Top Source Markets

Bahrain accounted for 46% of total inbound visits, while Egypt and UAE accounted for 33% and 10%.

89%

of inbound visits from
Bahrain, Egypt, and
UAE

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

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information

Key Upcoming Projects

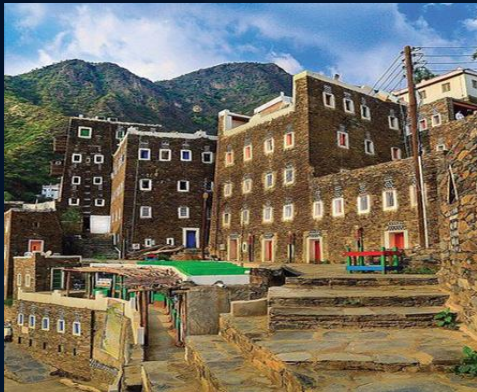
Non-Exhaustive



Abha Airport Expansion

Matarat Holding Company is planning to undertake an expansion of the Abha International Airport to increase capacity from 1.1 million annual passenger capacity to 8.5 by 2030 and 13 million by 2053.

Stage:	Tender
Value:	2,000Mn \$
Completion (estimate)	Q2 2028
Site Area	65,000 m2



Soudah Development

Soudah Development Company (SDC) is developing a luxury mountain tourism destination "Soudah Peaks" +3,000 meters above sea level, and aims to attract +2 Mn visitors. Project will be opened in phases.

Stage:	Execution
Value:	7,700Mn \$
Completion (estimate)	Q4 2033
Site Area	645 km2
Key Components	Hospitality Residential Adventure and F&B Retail (50K m2)



ARDARA - Wadi

ARDARA, a PIF subsidiary, is planning to develop a tourism destination "AlWadi" in downtown Abha. It will feature five distinct districts each with its own unique experience.

Stage:	Execution
Value:	1,000Mn \$
Completion (estimate)	Q4 2028
Site Area	2.5 km2
Key Components	Hospitality Residential F&B, Retail

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

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information

Key Upcoming Projects

Non-Exhaustive



The Point Abha

SEDCO Holding is now developing a mixed-use lifestyle destination within the city of Abha. The Point Project is located west of Abha, 3.75 km from Abha city center on King Fahd Expressway, and 14 minutes away from Abha International Airport.

Stage:	Execution
Value:	172Mn \$
Completion (estimate)	Q2 2027
Site Area BUA	76,000 m2 179,407 m2
Key Components	Hospitality Retail and F&B Entertainment



SEVEN Abha

SEVEN is planning to develop an entertainment destination located between Abha and Khamis Mushayt. This family-friendly destination will feature various entertainment zones in partnership with global brands.

Stage:	Execution
Value:	347Mn \$
Site Area BUA	64,000 m2 79,000 m2
Key Components	Amusement Park Hospitality Residential F&B and Retail



Stadium Expansion

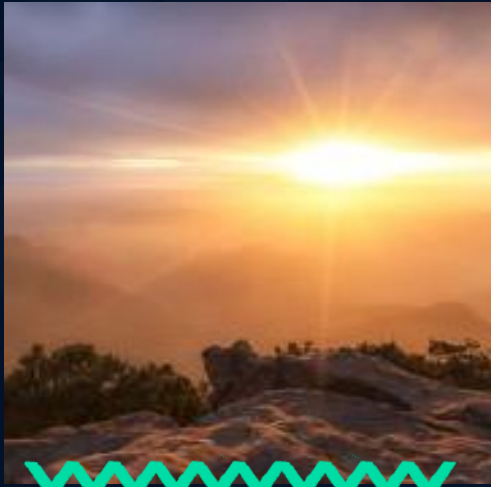
King Khalid University is planning to expand the King Khalid University Stadium in southeast Abha in preparation for the FIFA World Cup 2034. The stadium will be able to accommodate +45K attendees.

Stage:	Design
Value:	500Mn \$
Completion (estimate)	Q4 2032
Seating Capacity	+45,000

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

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information

Value Proposition



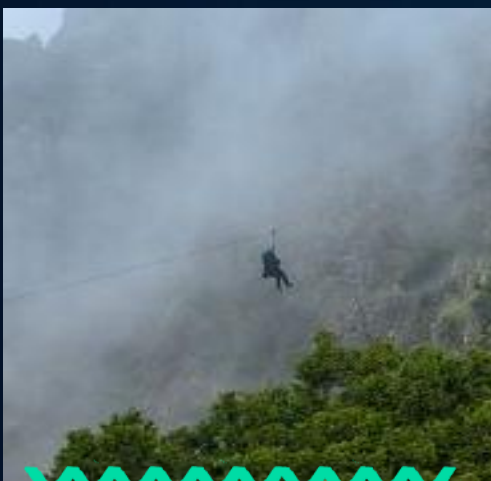
Sightseeing & Nature

With 5 unique landscapes (coast, pre-mountain valleys, mountain tops, plateaus, and desert) and a temperate climate, Aseer is a popular local destination for nature-lovers and sightseeing.



Culture & Heritage

With +4,000 heritage villages and +400 archeological sites, Aseer can provide authentic and immersive historical experiences. It features assets like Rijal Alma'a, which was featured as one of the world's best tourism villages by UNWTO.



Recreation

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

Source : MT, TDF analysis

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information

Sightseeing & Nature

Non-Exhaustive

With 5 unique landscapes (coast, pre-mountain valleys, mountain tops, plateaus, and desert) and a temperate climate, Aseer is a popular local destination for nature-lovers and sightseeing.



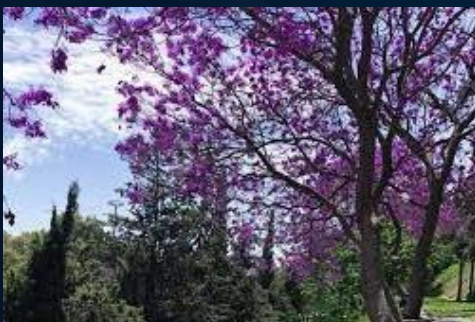
Mountains

Aseer region is home to 20 of KSA's highest mountain peaks. Among them is AlSoudah Mountain, KSA's highest peak, with a descent of 7km and breathtaking views where visitors can take cable cars through the clouds down to the Sarawat Valley.



Coastline & Untouched Beaches

Aseer has 120km of coastline and untouched beaches along the Red Sea coast. Alongside other projects on the Red Sea coast, Aseer's coast provides an opportunity to integrate into ongoing coastal projects and cruises.



Jacaranda Tree Blossom

Every year, Abha's streets and parks are blanketed in purple by its famous Jacaranda Tree as they bloom. This has become a popular tourist attraction as visitors to enjoy with friends and family.



Local Honey & Products

With over 5,000 beehives, Aseer is well known for its local honey products. Its Sid'r honey is widely recognized as one of the best in the Middle East. Aseer is also well known for its dates, coffee, and local produce.

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

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information

Culture & Heritage

Non-Exhaustive

With +4,000 heritage villages and +400 archeological sites, Aseer can provide authentic and immersive historical experiences. It features assets like Rijal Alma'a, which was featured as one of the world's best tourism villages by UNWTO.



Rijal Alma'a

Included among the world's best tourist villages by the UNWTO, Rijal Alma'a consists of 60 multi-story palaces built of mud stone and wood. It was once an important stop for travelers from Yemen to the holy cities of Makkah and Madinah.



Al Habala

A unique hanging village is one of the genuine wonders of Saudi Arabia, with a series of sandstone houses hewn from local rock perches on a ledge 400m down a sheer cliff, and was accessible only by rope ladders.



Al-Qatt Al-Asiri

Inscribed on UNESCO's list of Intangible Cultural Heritage of Humanity, Al-Qatt Al-Asiri is a bright colorful style of artistic geometric designs used to decorate interior walls. Skills and patterns are passed down from generation to generation and have evolved to create the unique identity of the region.



Flowermen Festival

On display during Al-Soudah Season, men in Rijal Alma'a can be seen dressed in traditional attire. Nicknamed the "Flower Men," they are adorned by floral wreaths and colorful vibrant striped clothing. They showcase one of the region's many cultural assets and distinct character.

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

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information

Recreation

Non-Exhaustive

Its temperate climate, multiple sports & recreation sites, and diverse topography, Aseer offers high potential for outdoor recreation and adventure tourism.

Al Soudah Festival also offers various outdoor sports activities.



Aseer National Park

KSA's first national park is home to remarkable scenery including mountain ranges ~3,000m above sea level, and picturesque views overlooking green valleys. It is home to over 300 species of birds & animals and a wide array of plant species. It offers several camping activities, hiking, and recreational activities.



Jabal Thera (Green Mountain)

One of the mountain landmarks in Abha is Jabal Thera, also known as "Green Mountain". At night, the mountain is illuminated by neon green lights. Visitors can visit the summit by cable car, where they can enjoy amazing views from a restaurant and café with a terrace.



Coolest Region in KSA

Aseer's climate is 10⁰ cooler than the rest of the Kingdom. It offers better thermal comfort than Barcelona, making it a strategic location for outdoor recreational activities and offerings.



Outdoor Recreational Activities

Aseer's climate and terrain provides a suitable environment for various sporting activities across the sea, desert or mountains. Climbing races in the Tanumah Mountains, and paragliding in Al-Soudah are popular options for adventure enthusiasts.

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

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information

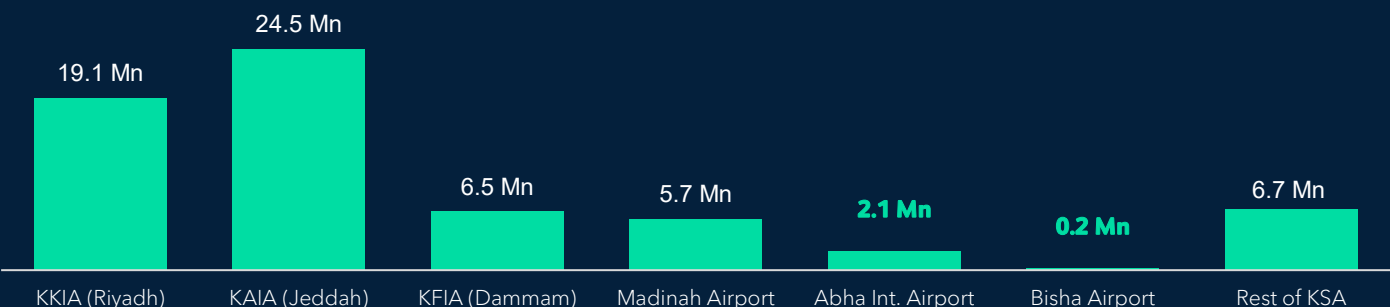


Connectivity

Air Transport

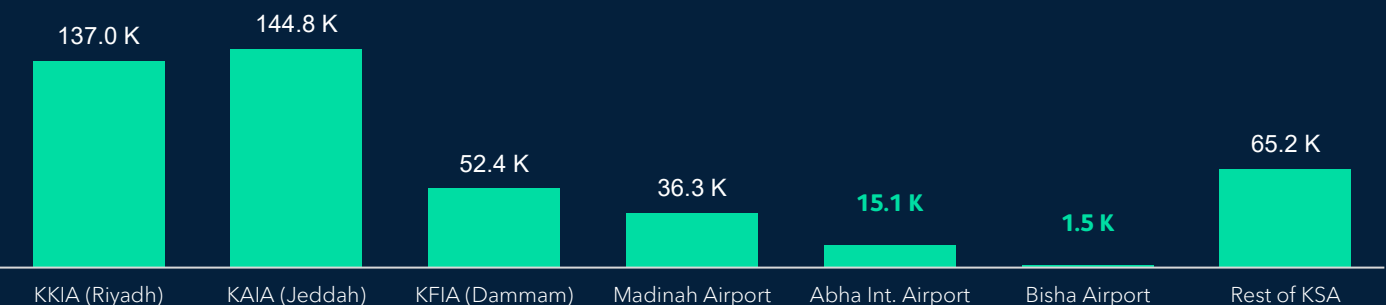
Aseer has two airports, the Abha International Airport and Bisha Domestic Airport. They account for a combined total of approximately 3.5% of total arriving passengers and flights in the Kingdom.

Number of Passengers (Arrival, 2024)



Out of a total 64.8 million passengers arriving to the Kingdom, Aseer's Domestic & International Airports account for 3.5% of all arriving air passengers.

Number of Flights (Arrival, 2024)



Out of a total 452 thousand flights arriving to KSA, Aseer's Domestic & International Airports accounted for 3.7% of total flights.

Source : GACA, TDF Analysis

TDF is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information



Disclaimer



By accessing or using this report, the user acknowledges that they have read, understood, and agreed to be bound by this disclaimer. this report should not be considered as a source of advice, credit analysis, or recommendation, and should not be construed as investment, financial, legal, or any other professional advice, and It will not be used for commercial or advertising purposes.

The Tourism Development Fund ("The Fund") makes no representation or warranty, whether expressed or implied, as to the completeness, accuracy, reliability, suitability, or availability of the data, information, or related materials contained in this report for any purpose, and such materials may not be used for any purpose other than general use. Any reliance placed on this report shall be strictly at the user's own responsibility. Under no circumstances shall the Fund be liable to any person or entity for any decision or action taken, or to be taken, based on the content of this report. Furthermore, the Fund disclaims any/all liability for any direct, indirect damage, loss of opportunity, or any other damage of any kind resulting from the use of this report.

