

JEDDAH



Destination Report

20
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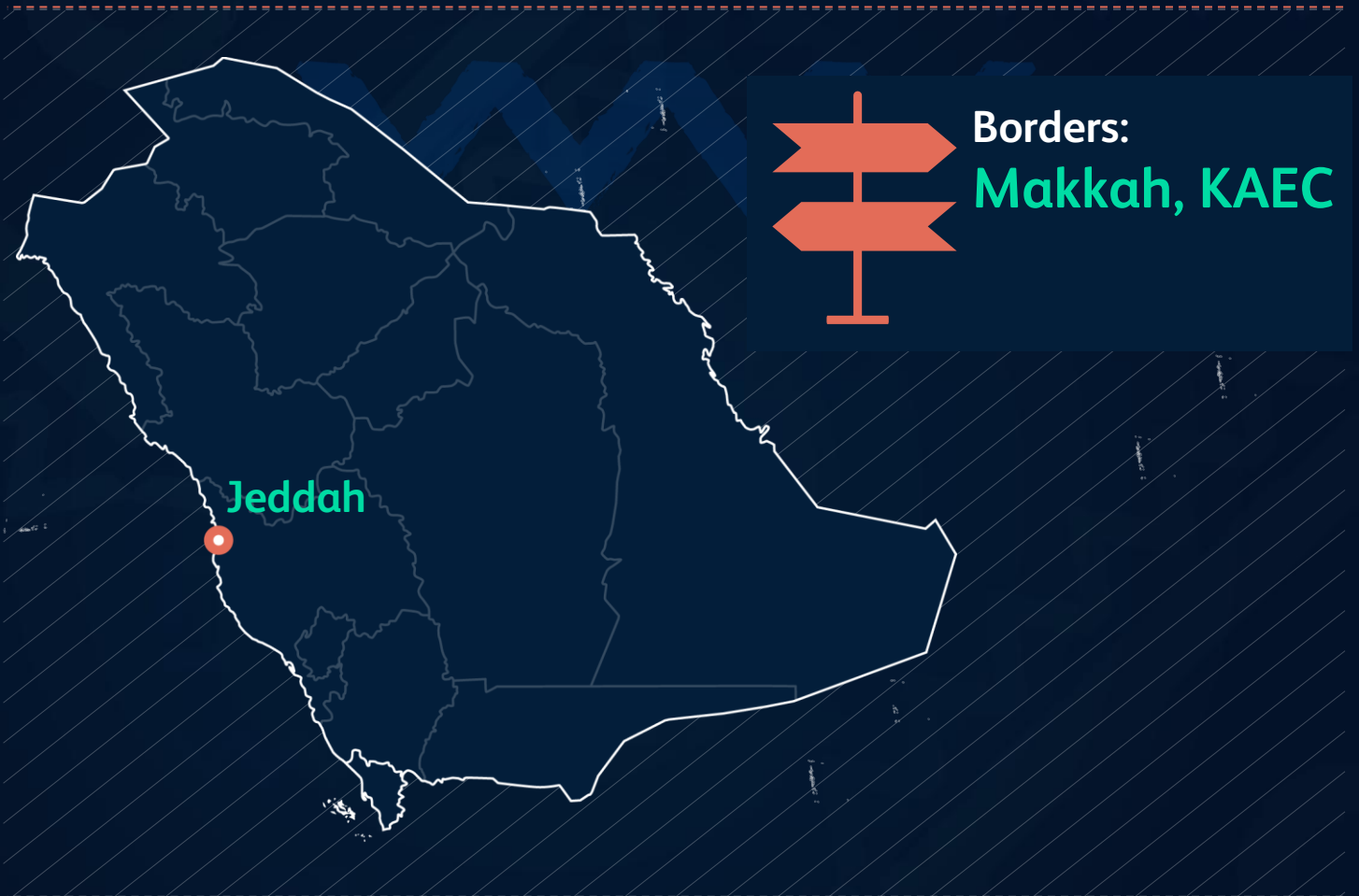
Tourism صندوق
Development التنمية
Fund السياحي



JEDDAH

Cultural Melting Pot

Jeddah is the 2nd largest city in KSA by population, while the Makkah region accounts for over a quarter of the national population. Its rich historical role as a trading hub and gateway for religious tourism has transformed Jeddah into a city with a unique identity and a reputation for being a cultural melting pot. Its impressive air and land accessibility, location on the pristine Red Sea coastline, and its thriving gastronomic and entertainment scene positions the city as one of the premier destinations for tourism in the Kingdom.



Population 2022

3,751,722





Average Temperature 25 - 35 ° C

Consistently warm & humid year-round, making it an attractive winter-time destination, but summer temperatures are higher than KSA average.

31%

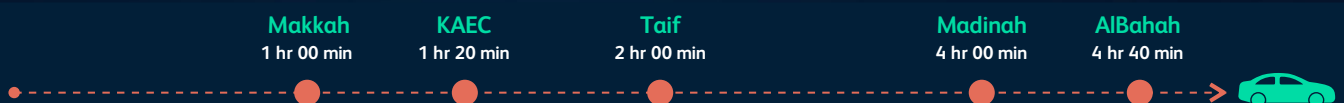
Ages < 30



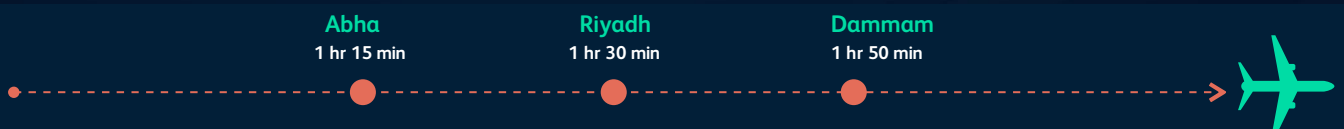
Proximity to Nearby Cities

Jeddah has exceptional accessibility through road and air transport, connects to two major highways, and has a world-class international airport (largest by capacity and passenger flows). Jeddah is only one hour away from Islam's holiest city and nearby other attractive city destinations. Upcoming public transportation projects and airport expansions are expected to further improve accessibility.

Driving



Flying



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

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Key Highlights



01

2nd most populous city in the Kingdom with a high proportion of relatively well-educated youth and a dedicated university tourism program.

02

Home to currently the largest international airport in KSA with ongoing expansion plans to double capacity.

03

Gateway to Makkah with religious travelers required to stop and pass-through Jeddah, providing the city with a steady supply of visitors.

04

Home to Jeddah Old Town (Al Balad) which is a UNESCO World Heritage Site and centerpiece for the Historic Jeddah Revitalization Project.

05

One of the main destinations in KSA for key festivals, international events, and entertainment, attracting leisure tourists, with further opportunities to expand entertainment offerings to meet growing demand.

06

Proximity to nearby cities and strategic location on the Red Sea Coast provide opportunity to develop a multi-segment itinerary, especially along the Red Sea and through the Haramain Railway.

07

Potential to attract private sector investment given the maturity of the destination and potential to unlock full value of several key segments such as gastrotourism, sun & beach, cruise, entertainment, etc.

08

Several ongoing projects and growth drivers such as the Jeddah Economic City, Jeddah Downtown, Red Sea Cruises, KAIA expansion, KAEC, etc.

09

Cultural hub with rich culinary assets and opportunity to leverage gastrotourism potential to create unique offerings.

10

Opportunity to unlock the full potential of Jeddah's cruise tourism with the city being a key stop across the Red Sea coast and to develop authentic and quality beach resorts.

Source : MT, TDF analysis

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Tourism Landscape

01

Mixed Performance in 2024 but well above 2019¹

Jeddah visitors and spend witnessed growth in 2024. And yet, both remain well above 2019 levels showcasing the strong attractiveness of the destination to domestic & inbound visitors.

11.3Mn

Total Overnight Visits

02

Inbound Visits Increased 170% Compared to 2019

Since 2019, Jeddah's inbound visits grew nearly three times faster than domestic and grew 33% YoY.

170%

Growth in visits since 2019

03

Stable Seasonality with Peak in Summer

Jeddah enjoys relatively stable seasonality with demand throughout the year, and peak months were January, February, March, and November.

38%

of visits during 4 peak months

04

Leisure & VFR & Business Key Visit Purposes

Leisure accounts for bulk of domestic visitors and the main growth driver for inbound. VFR is the main travel purpose for inbound. Business has been a growth driver, especially for domestic visits.

55%

Of total visitors are for leisure

05

Families Driving Domestic, Inbound by Individuals

The average party size for domestic visits were +3 staying for 6 nights, while inbound was characterized by average party size of 1.6 staying for more than three weeks.

18%

Of total visitors driven by inbound

06

F&B, Transportation, and Accommodation

F&B, Transportation, and Accommodation were the top tourism spend segments accounting for **73%** of total spend.

73%

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

07

Egypt, UAE, and UK Top Source Markets

Egypt accounted for **37%** of total inbound visits, while **UAE** and **UK** accounted for **11%** and **8%**.

56%

of inbound visits from Egypt, UAE, and UK

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

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Key Upcoming Projects

Non-Exhaustive



Saudi Land Bridge

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

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



KAIA Expansion

The three-phase project is expected to increase the airport's annual passenger capacity to 114 million. The expansion includes the construction & expansion of two terminals.

Stage:	Execution
Value:	31,000Mn \$
Completion (estimate)	Q4 2031



Jeddah Islamic Port Expansion

Saudi Ports Authority (Mawani) are expanding the Jeddah Islamic Port and marine facilities to expand berth & passenger capacity.

Stage:	Execution
Value:	7,000Mn \$
Completion (estimate)	Q4 2030

Key Upcoming Projects

Non-Exhaustive



Central Jeddah

A large mixed-use development led by Jeddah Central Development Co. (JCDC), a PIF subsidiary, to redevelop Jeddah's waterfront corniche and create a **new modern downtown**.

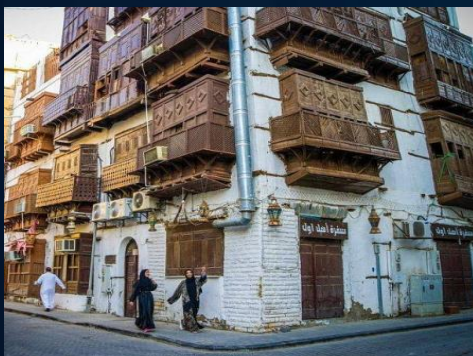
Stage:	Execution
Value:	20,000Mn \$
Completion (estimate)	Q4 2030
Key Components	Hotel Entertainment Shopping Residential



Jeddah Economic City

Jeddah Economic City will feature a centerpiece "Jeddah Tower" that is planned to be the **tallest building in the world** upon its completion. The project will cover 5.3 Mn sqm of land.

Stage:	Execution
Value:	20,000Mn \$
Completion (estimate)	Q4 2028
Key Components	Hotel Entertainment Shopping Residential



Historic Jeddah

The project aims to preserve, conserve, and rehabilitate the historic "Al Balad". The historic area has +600 traditional buildings, 36 historical mosques and five major historical markets, squares and historic sites.

Stage:	Planning
Value:	5,000Mn \$
Site Area	2.5 km2
Key Components	Hotel & Office Office F&B and Retail Marina

Key Upcoming Projects

Non-Exhaustive



Qiddiya Coast North

The Qiddiya costal project in Jeddah is situated 64 Km north of Jeddah's cornice near Durrat Al Arous. It will include a stadium in preparation for the 2034 FIFA World Cup.

Stage:	Execution
Value:	1,386Mn \$
Completion (estimate)	Q4 2032
Key Components	Hotel Entertainment Residential Marina



SEVEN Entertainment

SEVEN's entertainment project includes the construction of an entertainment complex focused on leisure and entertainment.

Stage:	Design
Value:	350Mn \$
Key Components	Amusement Park F&B Retail Entertainment

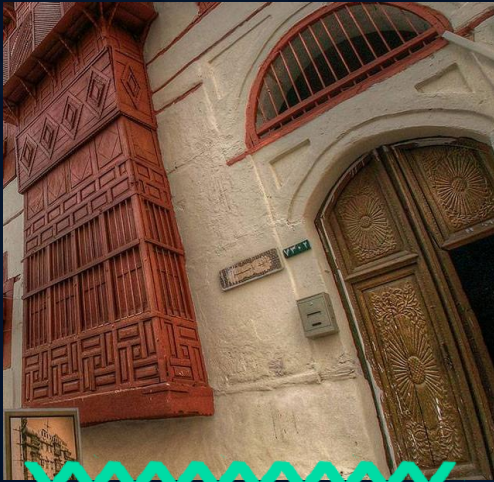


MARAFY Waterfront

MARAFY's canal will connect and extend the Obhur Creek. This navigable canal is the first to be built in Saudi Arabia, and will be flanked by multiple districts, including ROSHN's integrated residential community ALAROUS.

Stage:	Execution
Value:	5,000Mn \$
Completion (estimate)	Q4 2028
Key Components	Residential Canal Transport Leisure

Value Proposition



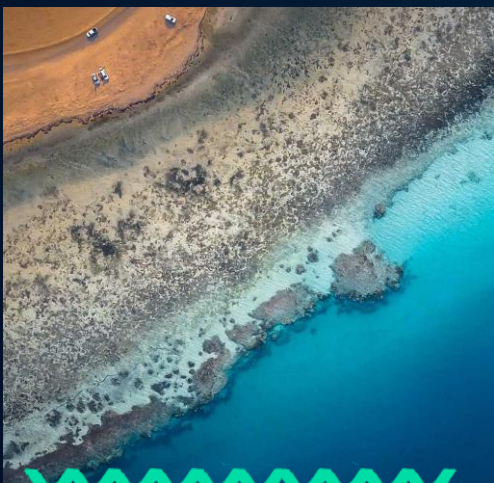
Culture & Heritage

Jeddah has a rich portfolio of historical & cultural assets displaying thousands of years of Islamic & pre-Islamic history, including Jeddah Old Town (a UNESCO World Heritage Site), which served as a 7th century major port for the Indian Ocean Trade Routes.



Entertainment & Gastronomy

Jeddah hosts a variety of attractive entertainment events and attractions, such as the Red Sea Film Festival, Jeddah Seasons, and hosting international events such as the Grand Prix. The city is also famous for its seafood and native dishes and thriving food scene.



Sun & Sea

Located strategically on the Red Sea Coast, Jeddah's waterfront provides access to pristine beaches and activities. Jeddah is also poised to be a key part of the growing Red Sea Cruise lines and connect to other destinations on the Red Sea Coast, such as NEOM, Jazan, and others.

Source : MT, TDF analysis

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Culture & Heritage & Arts

Non-Exhaustive

Jeddah's historical and cultural assets by thousands of year of Islamic & pre-Islamic heritage. Visitors can experience the city's unique identity through its many festivals, museums, and cultural assets. The city is also home to a growing arts scene and hosts multiple events throughout the year to showcase and support the arts community.



Jeddah Old Town

A UNESCO World Heritage Site, Jeddah Old Town is the historic center of Jeddah founded in the 7th century and was a major port for the Indian Ocean trade routes. It is characterized by a unique architectural design, picturesque roads, and different types of F&B options, museums, and mosques nearby.



Historical Museums & Architecture

Jeddah is home to numerous museums, with unique Hijazi architecture, artifacts, and historical significance. Some examples include Nassif House in AlBalad, built in 1881, served as the temporary royal residence of King Abdulaziz. Tayebat City and Abdul Raoof Hasan Khalil Museums each display Hijazi architecture and contain a large portfolio of historical artifacts.



Arts & Films

As a cultural hub, Jeddah has a thriving arts scene with multiple art galleries and local artists. The Ministry of Culture also launched several a dedicated arts residency program to provide artists with exposure, networking opportunities, and support. The Red Sea International Film Festival is often held in December and has become an important part of the growing film industry ecosystem in KSA.



Traditional Souqs and Handicrafts

Jeddah has a variety of traditional souqs in Jeddah's historic district and across Jeddah with numerous products, styles, and cultural crafts. Shoppers can find local fabrics, incense, bakeries, spices, coffee, and more in markets such as Souq Al Badu, Souq Qabil, Souq Alawi, Souq Bab Al Makkah, Souq AlMena, Souk Al Sawarek, and more.

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

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Entertainment & Recreation

Non-Exhaustive

Jeddah is a prime destination for those seeking entertainment thanks to its many festivals and international events which attract leisure tourists throughout the year. There are also several entertainment offerings for shoppers, whether it is modern malls or homegrown market boutique shops. With a rich pipeline of malls and increased entertainment, Jeddah is poised to become a key tourist destination for leisure.



Jeddah Season Festival

Jeddah Season Festival is held annually and features musical performances, culinary experiences, and various entertainment options. Although it was cancelled in 2020 and 2021 due to COVID-19, Jeddah Season has returned on an annual basis to celebrate Jeddah's history, beaches, food, film, and arts.



Live Events & Festivals

Jeddah often hosts entertainment and art-related events and festivals, some local and some international. Notable examples include the Red Sea International Film Festival, and the first ever F1 Race in the 2021 STC Saudi Arabia Grand Prix, which included live shows and musical performances from renowned global artists.



Shopping

Jeddah has a variety of shopping offerings from Al Khayyat Center's luxury offerings and the large Red Sea Mall to the Homegrown Market Boutique shopping area. The city has a rich pipeline of upcoming large-scale commercial malls, such as Souk 7 (340K GLA), Airport City (200K GLA), Mayasem (160K GLA), AlJawhara Mall (125K GLA) and more. It also has a growing local fashion scene with local homegrown brands popping up.

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Sun & Sea

Non-Exhaustive

Located strategically on the Red Sea Coast, Jeddah's waterfront provides visitors with access to pristine beaches and activities. Jeddah's reputation for seafood cuisine also complements their Sun & Sea offerings, while future projects and offerings are aimed to further enhance Jeddah's value proposition as a Sun & Sea destination.



Jeddah Corniche & Waterfront

4.2 km corniche located along the Red Sea containing luxury hotels, recreational activities, seaside cafes & restaurants, and beaches. It also contains the King Fahad Fountain, the highest fountain in the world, AlRahmah Floating Mosque, and iconic art sculptures. It has become a popular spot for tourists, families, and beach goers.



Cruises along the Red Sea

Jeddah's location along the Red Sea coastline, its advanced level of connectivity, and its abundance of historical and cultural assets strategically position the city to take advantage of the cruises being developed along the Red Sea coast with NEOM, Al Wajh, Yanbu, KAEC, Jazan, and other coastal destinations.



Beaches & Beach Resorts

Jeddah's prime destination along the Red Sea provides the city with high quality coastline and beaches, ranging from the lively Obhur area to quieter pristine beaches located further north. Jeddah's coastline makes it an attractive opportunity to develop quality branded beach resorts and clubs for local and international tourists alike.



Water Sports & Activities

Jeddah's surface water temperatures often range from high 70s to high 80s, making it ideal for water activities. Diving has also become a popular activity due to the coral reefs & Ann Ann shipwreck located in Abu Faramesh 2-hours north of Jeddah, Shipwreck Island in southwest Jeddah, and other popular spots.

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Gastronomy

Non-Exhaustive

Famous for its seafood, Jeddah's coastal location and its rich cultural history have resulted in the city's unique multi-cultural cuisine and dishes. It is home to successful and growing homegrown brands, Michelin-star restaurants, and food festivals and events focused on showcasing Jeddah's culinary delights.



Seafood and the Red Sea

Jeddah is famous for its seafood, while locals rave about the distinct taste of fresh seafood taken from the Red Sea and its local seafood dishes, and well known for najil, hamour, hareed, and saijan. The Jeddah Central Fish Market has also become a key stop for locals to haggle for the day's freshest catch and try its in-house restaurant.



Local Dishes & Drinks

Jeddah has a wide array of local specialty dishes, such as Mantu, and local specialty drinks, such as the summer favorite "Subia" (an exotic malt drink) and Tamarind drinks. These dishes/drinks, among others, add a rich culinary experience to Jeddah's residents and visitors throughout different seasons and during Ramadan.



Homegrown Brands

Jeddah is home to a growing number of historical and new authentic local restaurants and cafes. Among the most successful is AlBaik, which began in 1974 as an affordable fast food fried chicken restaurant, and has grown to be one of the most well-known brands in KSA and regionally. Another popular homegrown brand is AlTazaj, a barbecue chicken fast food restaurant founding in 1989 and has expanded regionally.

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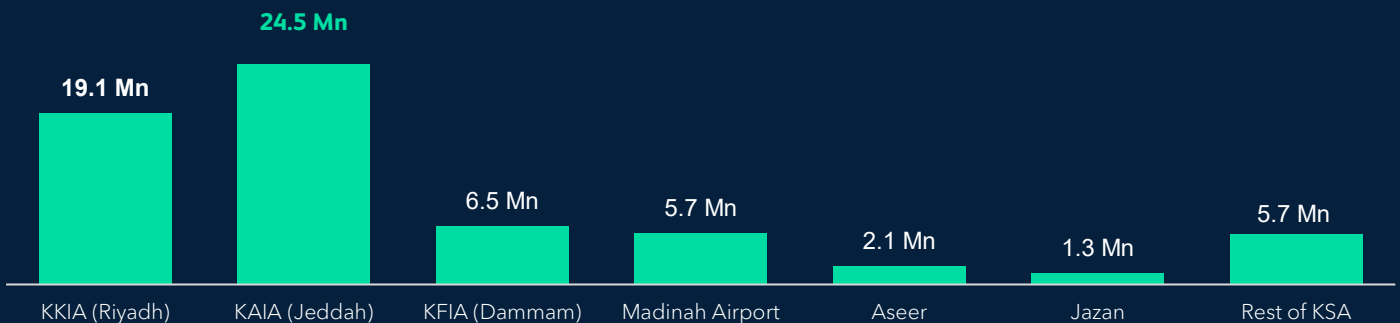


Connectivity

Air Transport

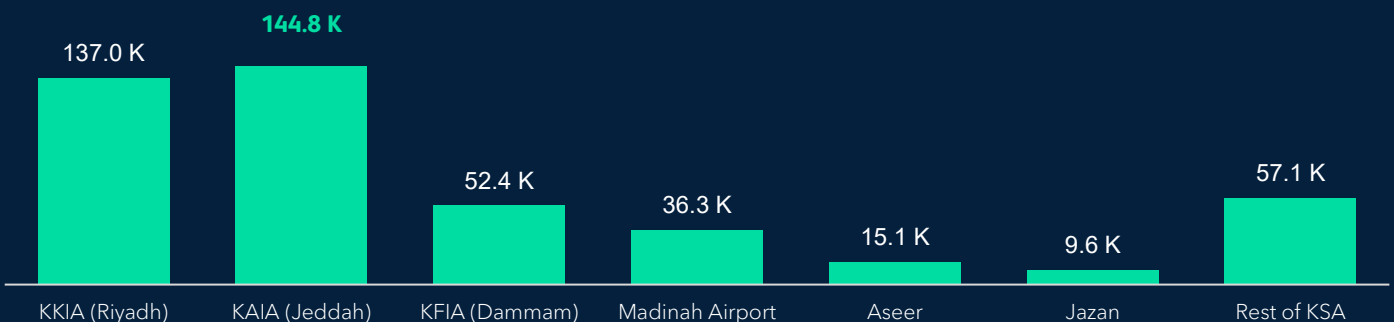
Jeddah's King Abdulaziz International Airport (KAIA) is the Kingdom's most active airport by number of passengers & flights, and exceeds that of Riyadh, KSA's capital city. While KAIA has the highest overall passenger capacity, KAIA's ongoing expansion plans are expected to increase overall capacity to 114 million in phases.

Number of Passengers (Arrival, 2024)



Out of a total 64.8 million passengers, KAIA accounts for over 38% of all passengers, showcasing the capacity and strength of its world-class airport.

Number of Flights (Arrival, 2024)



Out of a total 452 thousand flights, KAIA is the Kingdom's most active airport in terms of flights and accounts for 32% of total flights.

Source : GACA, TDF Analysis

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