



**LOGIC**  
I N S I G H T S

# EXPLORING ASEER

Maximizing Tourism  
Opportunities for  
**Regional Success**

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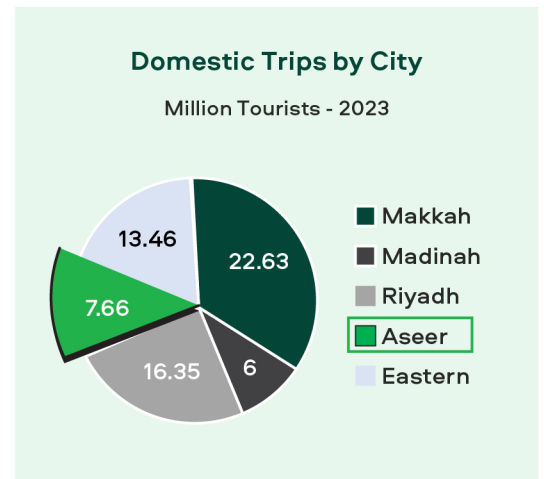
Traditionally recognized for its vast deserts, oil wealth, and religious significance, Saudi Arabia is embarking on a remarkable transformation. Guided by Vision 2030, the Kingdom is moving away from its dependence on oil towards a more diversified and sustainable economy. Central to this shift is the tourism sector, which is playing a critical role in introducing the nation to the global stage by highlighting its natural landscapes, rich cultural heritage, and historical treasures. From the cutting-edge developments in NEOM to the ancient wonders of Al-Ula, Saudi Arabia is emerging as a premier global tourism destination.

As part of its ambitious Vision 2030, Saudi Arabia aims to attract 150 million visitors annually by developing a wide range of regions and offering diverse tourism experiences. **A critical component of this vision is Aseer region**, renowned for its breathtaking landscapes, moderate weather, and rich cultural heritage. Aseer is uniquely poised to provide visitors with an immersive experience in nature, culture, and adventure, positioning itself as a key contributor to the Kingdom's tourism goals.

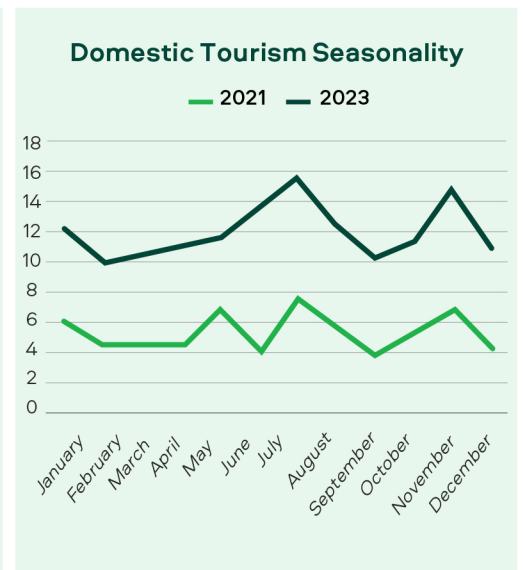
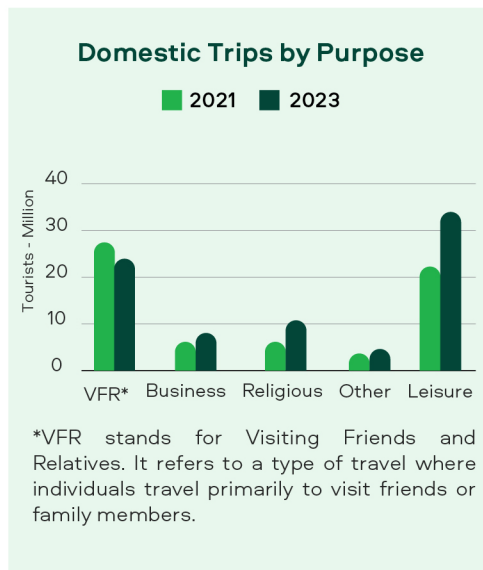
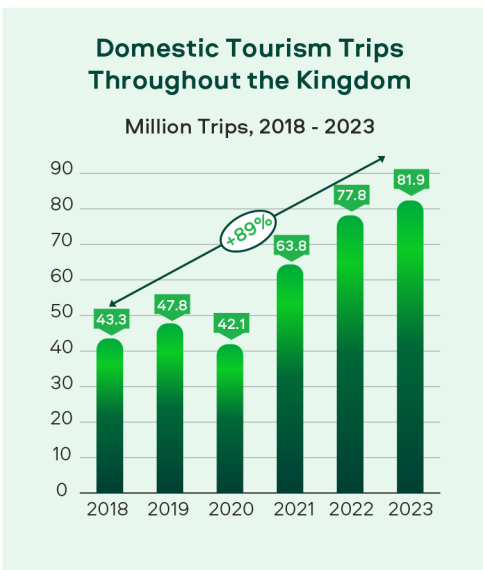
# 1 Domestic and Inbound Tourism Trends in the Kingdom

Aseer plays a pivotal role in Saudi Arabia's domestic tourism strategy, with the Kingdom welcoming 60 million domestic tourists in the first half of 2024. Aseer's cooler climate and outdoor activities make it a popular destination, particularly during the summer months.

Beyond domestic tourism, inbound tourism is on the rise, with key markets including the GCC countries, Asia, and Europe. International visitors are drawn to Aseer's offerings of cultural immersion, adventure, and wellness tourism. Additionally, outbound tourism trends influence domestic travel, as many Saudi travelers seek more affordable and closer alternatives, further boosting Aseer's appeal.



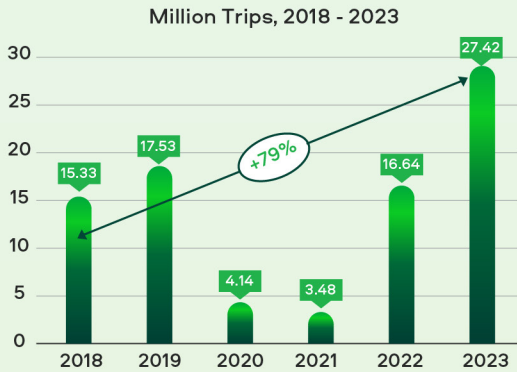
## 1.1 Domestic Tourism



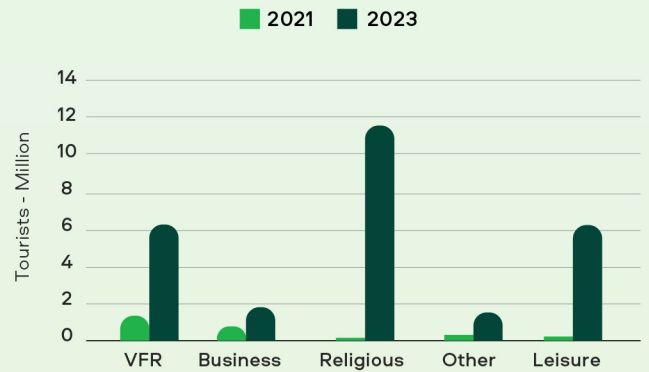


## 1.2 | Inbound Tourism

### Inbound Tourism Trips Throughout the Kingdom



### Inbound Trips by Purpose

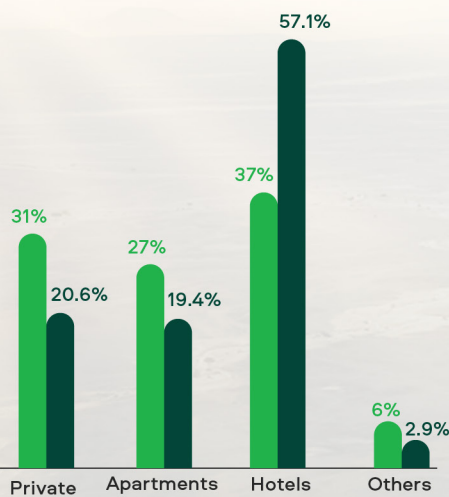


As illustrated in the graphs, inbound travel to Saudi Arabia experienced a sharp decline in 2020 and 2021, largely as a result of the global COVID-19 pandemic. However, the data reveals a significant recovery, with a +688% surge from 2021 to 2023. Such rebound highlights the effectiveness of strategic initiatives and the global recovery from the pandemic.

### Types of Accommodation

(2023)

■ Saudi ■ Non-Saudi



### Overnight Stays

Overnight Stays

**495.34**  
Million Nights in 2023



Saudi Tourists

Average Length of Stay

**6.05**  
Nights per tourist

Overnight Stays

**432.3**  
Million Nights in 2023



Non- Saudi  
Tourists

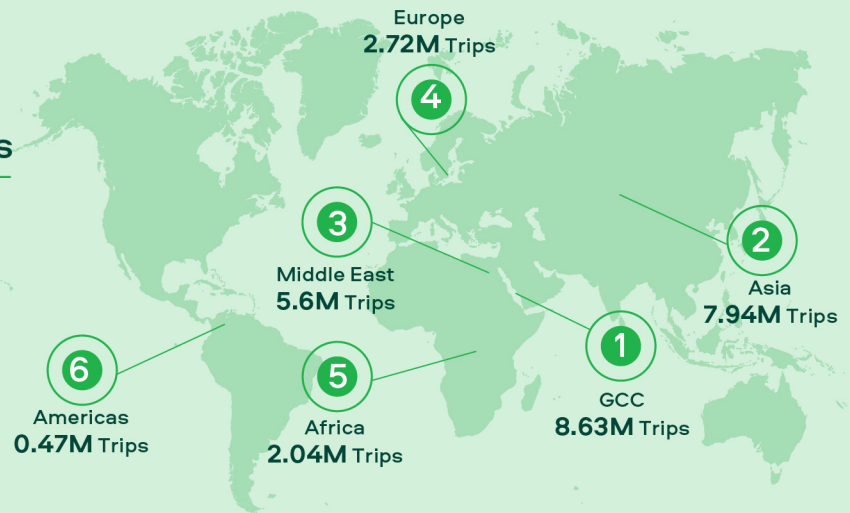
Average Length of Stay

**15.76**  
Nights per tourist

The graphs illustrated above suggest that non-Saudi tourists have a higher preference for staying in hotels compared to Saudi, who are more likely to stay in private accommodations and apartments. Despite Saudi tourists having more total overnight stays, their average length of stay (6.05 nights) is significantly shorter than that of non-Saudi tourists (15.76 nights). This indicates that non-Saudi tourists tend to spend more extended periods per visit.

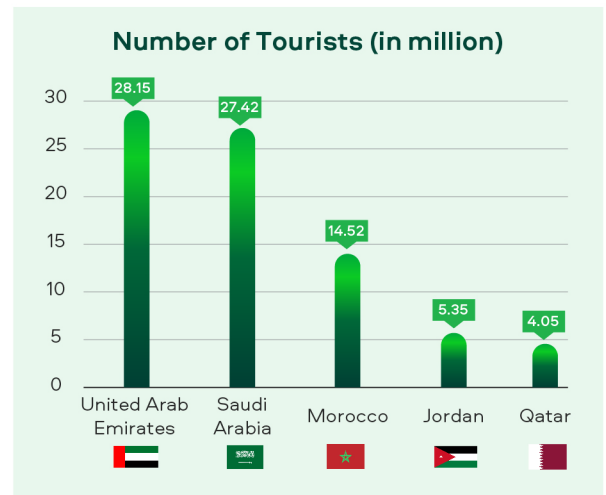
## Inbound Tourism Market Segments

Inbound tourism is on the rise, particularly from the GCC nations, Asia, and the Middle East.



### 1.2.1 | Top Tourism Performers in the Region (Million Tourists)

The 2023 tourism data reveals key trends and preferences in the Middle East and Africa region, with approximately 160 million tourists visiting. The United Arab Emirates, Saudi Arabia, Morocco, Jordan, and Qatar are leading destinations in the region, attracting significant numbers of visitors due to their diverse attractions, which include luxury tourism, cultural sites, and historical landmarks.



## Leading Global Destination Cities Comparable to Aseer in 2023

Here are the leading global cities of 2023, recognized for their leisure, natural beauty, and relaxation, sharing similar traits with Aseer, which attracted 8 million visitors in 2023:

**Antalya**, Turkey, draws an impressive **16.5 million** visitors, offering a blend of nature, culture, and relaxation, making it a highly sought-after destination.

**Bangkok**, Thailand, approximately **12.2 million** visitors are attracted to its nature-centric experiences, vibrant markets, and tranquil nearby attractions such as floating markets and temples.

**Cancún**, Mexico, invites **10.8 million** tourists with its turquoise waters, pristine white beaches, and an abundance of all-inclusive resorts, making it a paradise for relaxation seekers.

**Zanzibar** City on Zanzibar Island, Tanzania, is celebrated for its peaceful beaches, rich culture, and historic Stone Town, positioning it as a top choice for leisure and nature tourism.

**Wadi Rum** in Jordan, known as the "Valley of the Moon," captivates visitors with its breathtaking desert landscapes, offering relaxation and adventure for explorers.



## 1.3 | Outbound Tourism Surge: Shaping the Future of Domestic Strategy

In 2023, Saudi Arabia's outbound tourism experienced remarkable growth, propelled by eased travel restrictions and heightened interest in leisure travel. **The number of outbound tourists surged by 37% compared to 2022, accompanied by a 74% increase in spending**, primarily during the summer season. Many Saudi travelers favored neighboring countries, especially the UAE, Switzerland, and Turkey, with a significant rise in leisure activities. **Despite this growth, the average spending per night for Saudis dropped from SAR 599 (€144) in 2022 to SAR 332 (€80) in 2023.** Looking ahead, Saudi outbound tourism is anticipated to continue its upward trajectory, with the **market projected to expand at a compound annual growth rate (CAGR) of 15.28% until 2027.**

The significant rise in Saudi Arabia's outbound tourism in 2023 is likely to impact domestic tourism in several ways:

### Competition with International Destinations

Domestic tourism may face competition as more Saudis travel to destinations like the UAE, Switzerland, and Turkey.

### Potential for Domestic Travel Off-Peak

Domestic tourism might increase during off-peak times as Saudis travel internationally during peak seasons.

### Price Sensitivity

Saudi tourists are becoming more price-sensitive, leading domestic destinations to offer affordable and value-driven options.

### Expansion Opportunities for Domestic Tourism

Despite outbound tourism growth, domestic travel remains convenient, presenting opportunities for campaigns targeting cost-effective getaways.

### Economic Balance

To counteract reduced local spending due to outbound tourism, the domestic sector could create events and packages that appeal to the same audience.

### Shift in Local Travel Preferences

The increase in outbound travel suggests a demand for diverse experiences, prompting domestic tourism providers to innovate with unique offerings.

In conclusion, the increase in outbound tourism will likely drive domestic tourism operators to reevaluate their products and pricing strategies. To stay competitive with international destinations, they will need to focus on off-peak times and offer unique experiences.





## 2 Overview of Aseer's Tourism Strategy

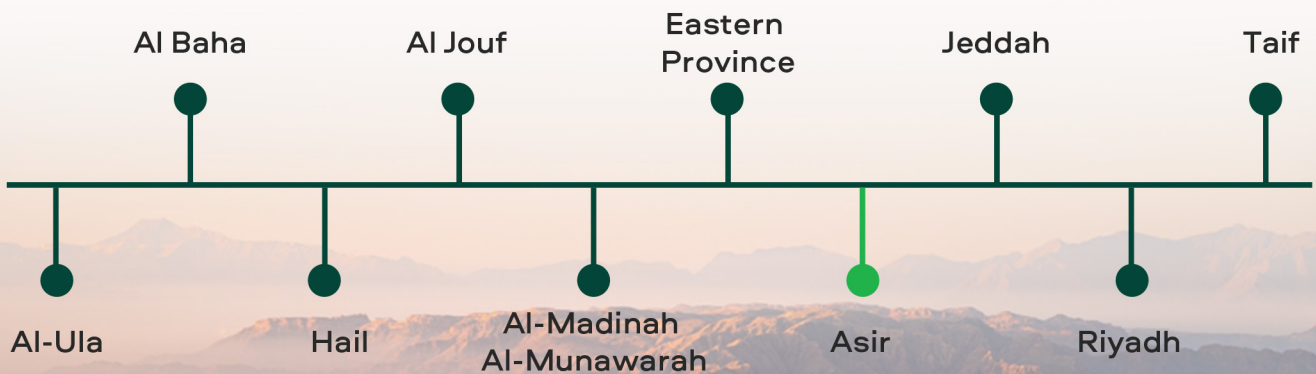
Aseer, a mountainous region in Saudi Arabia, is central to the Kingdom's Vision 2030 strategy for economic diversification through tourism. The government plans to establish Aseer as a premier destination for domestic and international travelers by adopting a customer-centric approach. This involves identifying key tourist segments, tailoring experiences to their preferences, and continuously enhancing offerings based on customer feedback. This approach aligns with national tourism goals and leverages Aseer's rich cultural heritage, stunning natural landscapes, and potential for adventure tourism.

### 2.1 Alignment with Vision 2030

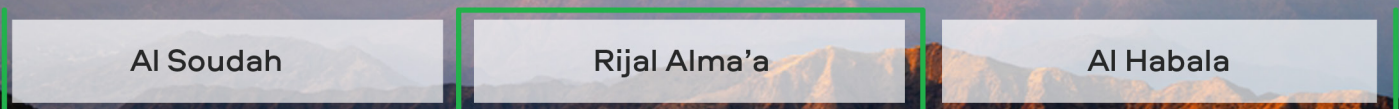


The national tourism strategy, accredited by the kingdom, outlines the key directions aligning with the goals of Saudi Vision 2030, reflecting the sector's aspirations.

#### Focusing on 10 Destinations, 35 Sites



#### Focusing on 3 Sites on Asir



Saudi Vision 2030 aims to attract 150 million tourists by 2030, and Aseer is pivotal in realizing this objective. With its distinctive attractions, Aseer is set to capture a substantial share of domestic and international visitors.



## 2.2 | Aseer's Strategic Direction

The strategic directions for Aseer are aligned with the National Tourism Strategy, integral to Saudi Arabia's Vision 2030. This vision outlines key objectives for Aseer to become a prominent global tourism hub, including:

Positioning Aseer as a top destination by leveraging its natural and cultural assets.

Enhancing the region's infrastructure to support tourism growth.

Developing key destinations, such as Al Soudah, Rijal Alma'a, and Al Habala, which are central to Aseer's tourism offering.

### Tourism Strategic Pillars in Asir

### Key Indicators



#### Country's Positioning

Focusing on offering variety of touristic attractions focusing on **nature, culture, recreation and outdoor activities**

**8 M** tourists in 2023

**10 M** tourists in 2030



#### Hospitality Investments

Focusing on **investing in serviced apartments and 3-4 star hotels** that meet families' needs

**+11K** hotel rooms 2030

**+12K** serviced apartments 2030

### 3 Investment Opportunities in Aseer's Tourism Infrastructure

To foster tourism growth in Aseer, substantial investment in infrastructure is essential. Opportunities span various segments:



#### Hospitality

Develop boutique, mid-range, and premium hotels, as well as business hotels, to cater to diverse tourist needs.



#### Cultural Attractions

Create museums, heritage villages, and traditional restaurants that showcase Aseer's rich cultural heritage.



#### Entertainment

Establish adventure parks, outdoor cinemas, and amusement centers to appeal to families and adventure seekers.



#### Wellness and Eco-tourism

Invest in wellness resorts and eco-lodges to attract tourists seeking relaxation and a connection with nature.















### 3.1 | Key Projects and Initiatives in Aseer for Tourism and Development

The government of Saudi Arabia has launched several key projects and programs to boost tourism and development in Aseer region. These initiatives aim to transform the region into a major international tourism destination. Here are the most significant projects and programs:

<b>New Abha International Airport</b>	Plans to expand and modernize the airport to handle increased visitors, enhancing Aseer connectivity and travel experience.
<b>Souda Peaks Project</b>	Transforming the Souda Mountains into a tourist destination with luxury hotels, entertainment centers, restaurants, and outdoor activities like hiking and paragliding.
<b>Abha New Stadium</b>	Building a new stadium to promote sports tourism and host major sporting events, attracting domestic and international visitors.
<b>Souda Village Development</b>	Developing a tourism village in Souda with amenities such as restaurants, cafes, resorts, and adventure tourism activities.
<b>Cultural and Heritage Projects</b>	Investing in preserving and promoting Aseer’s cultural heritage through restoring traditional villages and historical sites and organizing cultural festivals.
<b>Aseer Development Company</b>	Established to identify and develop opportunities in tourism, hospitality, health, sports, food, education, and more to attract investors.
<b>Aseer Road Infrastructure</b>	A 321 km road project to connect Aseer’s towns, enhancing tourist movement and regional accessibility.

These projects align with Saudi Arabia's Vision 2030, aiming to transform Aseer into a sustainable, nature-based, and culturally rich destination, making it a key tourism hub in the country.

## 3.2 | Specific Investment Opportunities

Entertainment		Culture and heritage	
 Amusement parks		 Heritage village	
 Adventure parks and action sports		 Museums	
Agricultural tourism		Hospitality	
 Tourist farms (for family activities)		 Boutique Hotels (small hotels)	
 Agricultural festivals		 Mid-range and premium hotels	
		 Business hotels	
		 Malls	





## 4 Integrating Customer-Centricity into Aseer's Core Tourism Strategy

A customer-centric approach is essential to developing an effective tourism strategy for Aseer. Based on a recent study conducted by LOGIC and tourism experts, Aseer's strategy should involve a more focused approach by deeply understanding tourists through defining key personas, such as family travelers and wellness enthusiasts. This enables Aseer to tailor its offerings through customizing activities, accommodations, and attractions to match the preferences of various tourist segments. Additionally, tourism tours offer opportunities to immerse tourists in diverse cultures, experience natural wonders, and embark on thrilling adventures.

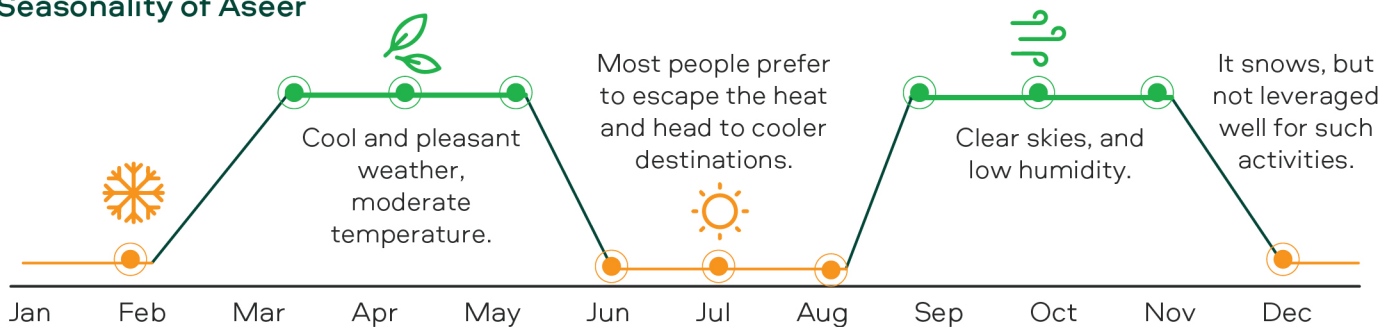
### Examples of Global Tourism Tours

 Japan's Golden Route Tour <b>Japan</b>	 Marrakech and Sahara Desert Tour <b>Morocco</b>
 Amazon Rainforest Adventure <b>Brazil/Peru</b>	 Safari in Masai Mara <b>Kenya</b>
 New Zealand South Island Adventure Tour - <b>New Zealand</b>	 Costa Rica Eco-Adventure Tour <b>Costa Rica</b>
 Bali Yoga and Wellness Retreat <b>Indonesia</b>	 Greek Islands Sailing Tour <b>Greece</b>

Regularly gathering feedback from visitors is also crucial for continuous improvement, allowing Aseer to consistently enhance the quality of its offerings. This approach ensures a tailored, high-caliber tourism experience that encourages return visits and draws in new tourists.

### 4.1 | Personalizing Tourism: Insights into Tourist Personas and Behavior

#### Seasonality of Aseer



#### Top Cities

Abha

An-Namas

Bishah

Khamis  
Mushayt

Rijal  
Almaa

Tanomah

## What Does Aseer Offer?



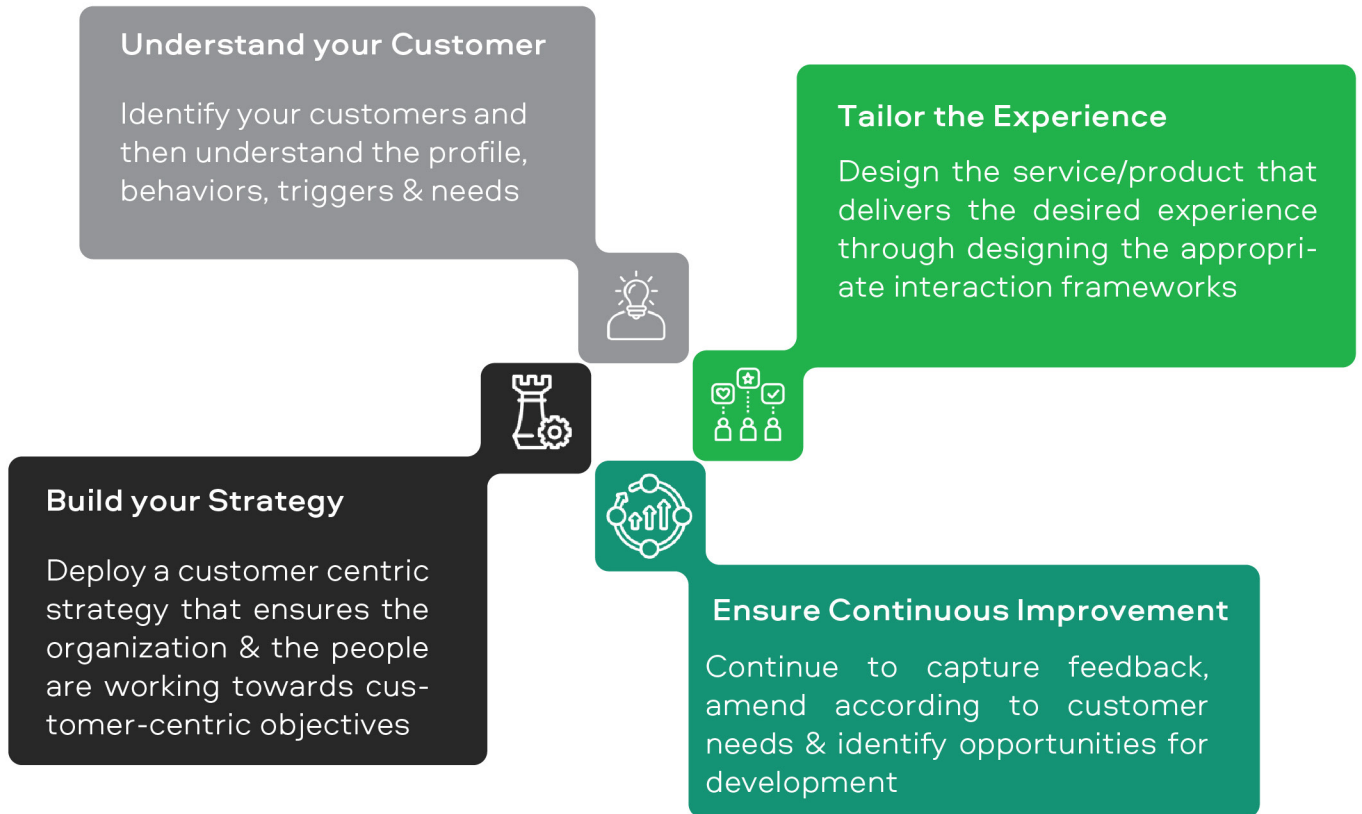
The effectiveness of Aseer’s tourism strategy hinges on understanding the behavior and preferences of key tourist personas:



By addressing the needs of these diverse personas, Aseer can tailor its tourism offerings to appeal to a broad spectrum of travelers.



## 4.2 | Four Pillars of a Customer-Centric Strategy: Placing the Customer at the Core of Transformation



While Aseer is well-positioned for growth, several challenges must be addressed to achieve its ambitious tourism goals. Key areas include:



### Infrastructure Gaps

Enhancements in transportation and accommodation are needed to handle the anticipated increase in tourist numbers.



### Service Quality

Ensuring that hospitality and entertainment services meet international standards is crucial for attracting and retaining visitors.



### Sustainability

Balancing development with environmental conservation is essential to preserve Aseer's natural beauty.

To overcome these challenges, Aseer must invest in infrastructure and service improvements while strongly focusing on sustainability and customer satisfaction. This approach will help establish the region as a leading tourist destination in Saudi Arabia.

## Meet the Contributors

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