

HOSPITALITY SECTOR PERFORMANCE

In Kingdom of Saudi Arabia

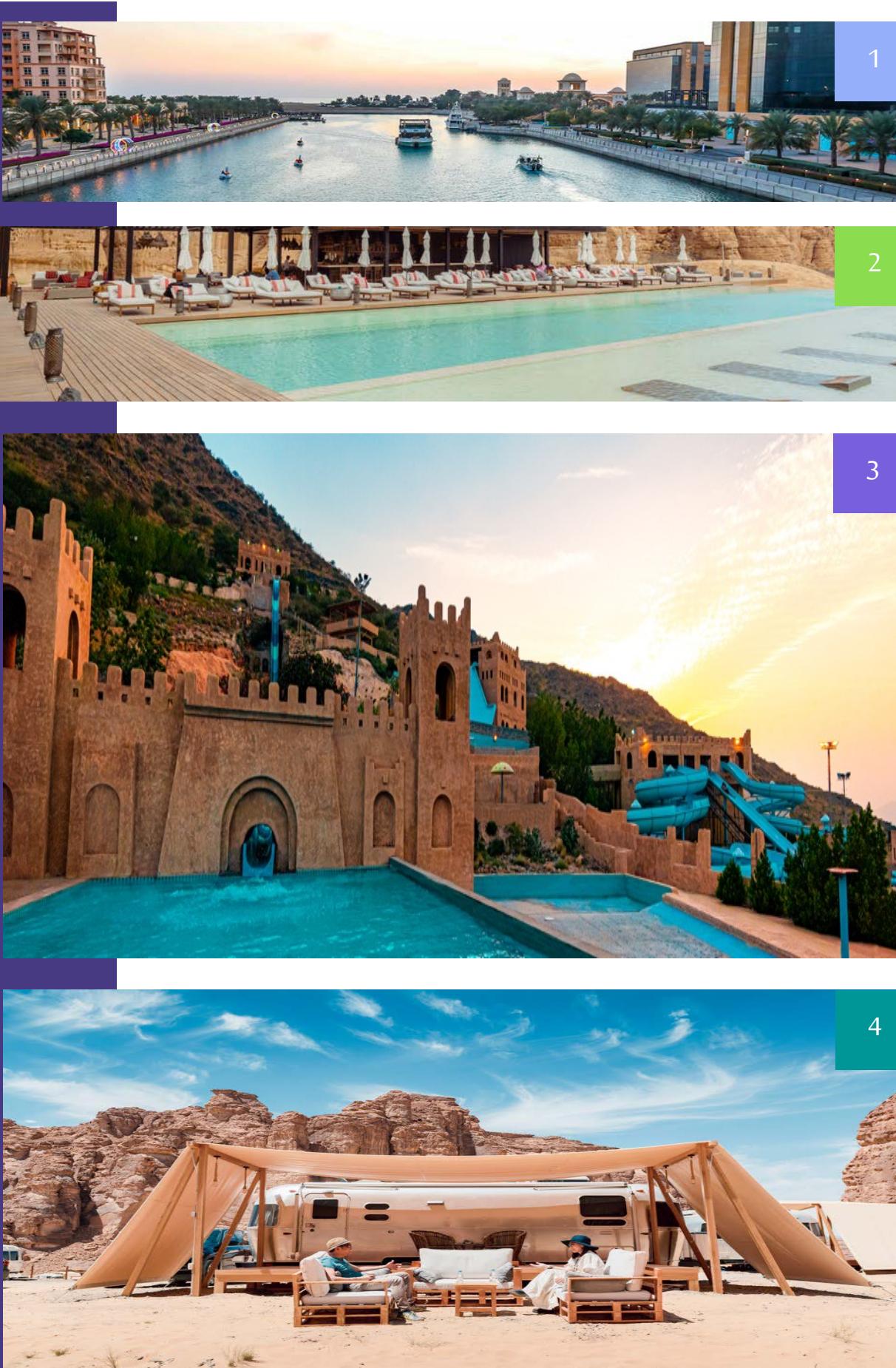
First Half of 2025

Ministry of Tourism | Data and Decision Support Deputyship



Resort in Al-Ula | Al-Madinah Al-Munawwarah

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Hotels Performance

Apartments & Others Performance

Monthly Performance

Overall Performance (Hotels, Apartments & Others)

Hotels Performance

Apartments & Others Performance

Licensed Tourism Hospitality Facilities

Frist Half 2025

Newly Licensed Facilities

Room Keys in Newly Licensed Facilities

As of the Frist Half 2025

Licensed Facilities

Room Keys in Licensed Facilities



INTRODUCTION

The Ministry of Tourism released its First Half-Year performance report for the hospitality sector. This report views the key hospitality indicators of the Kingdom of Saudi Arabia in H1 2025.

The report dives into the performance of the hospitality sector, focusing on the number of newly licensed tourism hospitality facilities, room keys, occupancy rates, Average Daily Rates (ADR), and Revenue Per Available Room (RevPAR).

These indicators are viewed across various types of tourism and hospitality facilities carrying active licenses from the Ministry of Tourism, including their classifications and distribution throughout the major cities and governorates of Saudi Arabia.

DEFINITIONS

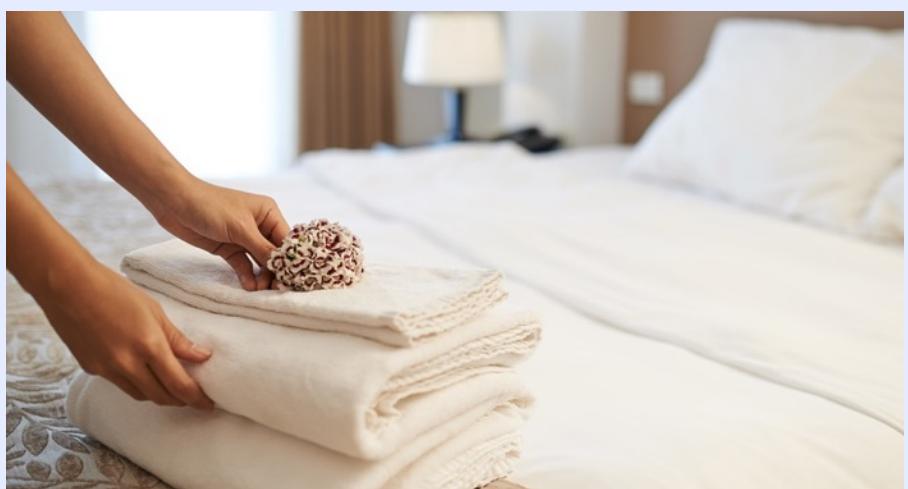


Chalets | the Red Sea

Tourism Hospitality Facility Type

Hotels:

Include hotels, hotel villas, boutique hotels, recovery hotels, heritage hotels, resorts and hotel apartments.



Apartments & Others:

Include serviced apartments, hostels, camps, chalets and others.

Terminology

Occupancy Rate:

The percentage of available rooms that were sold during the reference period. Occupancy is calculated by dividing the number of rooms sold by rooms available. It measures how much of a facility is being utilized or rented out compared to its total capacity



Revenue Per Available Room (RevPAR) (₪):

Total room revenue divided by the total number of available rooms. It measures the revenue-generating efficiency of a given room.



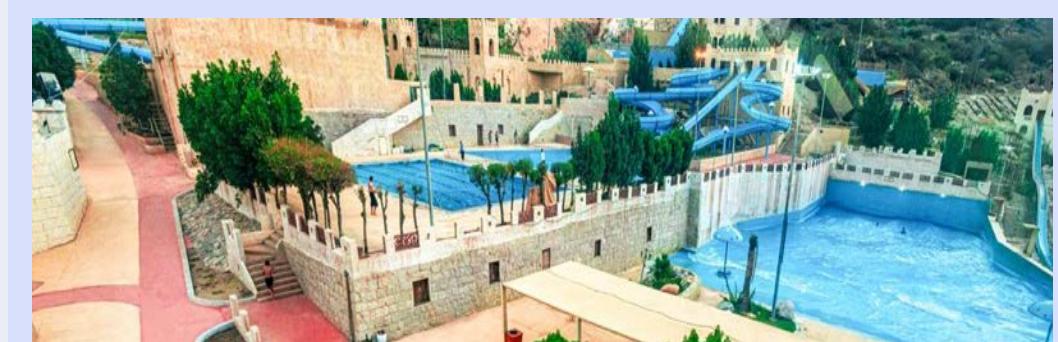
Average Daily Rate (ADR) (₪):

A measure of the average rate paid for rooms sold in Saudi Riyals (Excluding VAT and Municipal Services Fees), calculated by dividing room revenue by rooms sold.



Licensed Facilities:

Tourism hospitality facilities carrying active licenses until the end of H1 2025 (30 Jun 2024).

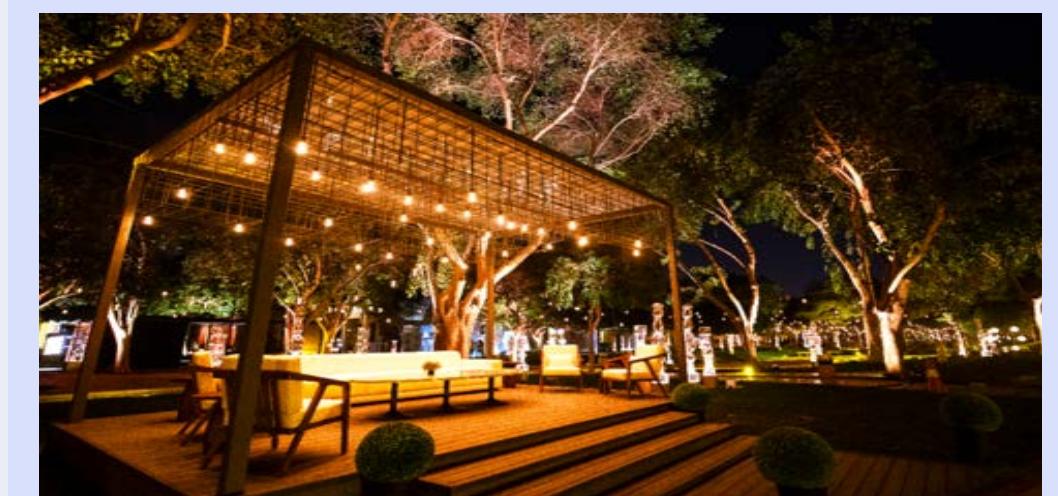


Room Keys:

A room is the unit formed by one room or groups of rooms which are rented by guests as a whole (and constituting an indivisible rental). Rooms may be single, double or multiple, depending on whether they are equipped permanently to accommodate one, two or several people. An apartment/hotel villa is a special type of room. It should be counted as one unit/ room irrespective of the number of rooms (one or more) it consists of.

Newly Licensed Facilities:

Tourism hospitality facilities newly licensed in H1 2025.





Overall Hospitality Sector Performance in Saudi Arabia – First Half

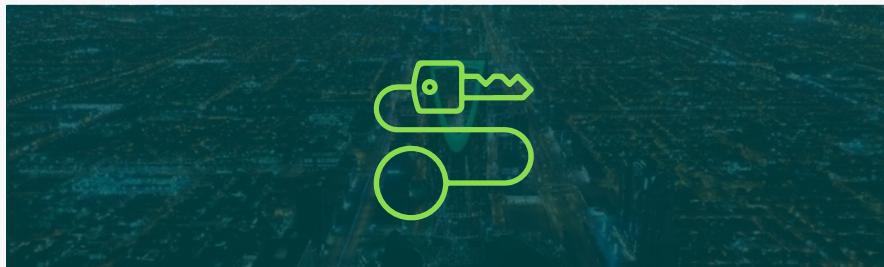
Performance of the First Half 2025



Licensed Facilities

5,326

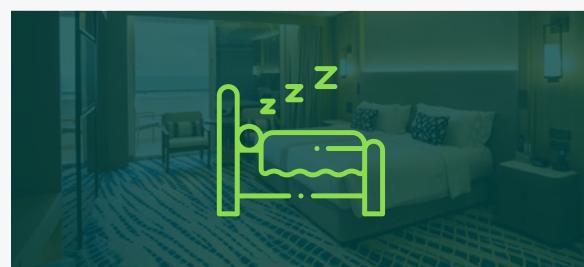
(987 newly licensed facilities in H1 2025)



Room Keys in Licensed Facilities

about **545K**

(Over 76K room keys in newly licensed facilities in H1 2025)



Occupancy Rate

56.6%

(0.3pp ▼)



Average Daily Rate

₳ 458

(0.0% ▼)



Revenue Per Available Room

₳ 259

(0.6% ▼)

Insights

- In H1 2025, Saudi Arabia's tourism accommodation facilities recorded an overall occupancy rate of (56.6%) for hotels, apartments & others.
- The Average Daily Rate (ADR) for all tourism accommodation facilities in H1 2025 averaged (₳ 458). Consequently, the Revenue Per Available Room (RevPAR) stood at (₳259).
- As of H1 2025, (5,326) tourism accommodation facilities were licensed, (47%) for hotels and (53%) for apartments & others across Saudi Arabia.
- As of H1 2025, a total of about (545K) room keys in licensed tourism accommodation facilities were recorded, (83%) for hotels and (17%) for apartments & others across Saudi Arabia.

Overall Hospitality Sector Performance in Saudi Arabia – Monthly



Occupancy Rate (%)

Overall

Peak: 63.4%
January

Min: 50.6%
April

Average: 56.6%

63.4%

59.5%

58.1%

50.6%

55.1%

51.9%

Jan

▲1.7pp

Feb

▼3.3pp

Mar

▲4.1pp

Apr

▼2.0pp

May

▲3.6pp

Jun

▼8.3pp

Hotels

Peak: 64.6%
January

Min: 50.3%
April

Average: 58.5%

64.6%

61.8%

62.5%

50.3%

55.8%

54.4%

Jan

▲1.5pp

Feb

▼2.5pp

Mar

▲6.2pp

Apr

▼3.1pp

May

▲6.0pp

Jun

▼9.5pp

Apartments & Others

Peak: 59.2%
January

Min: 41.7%
March

Average: 50.4%

59.2%

51.4%

41.7%

51.6%

53.5%

45.4%

Jan

▲1.2pp

Feb

▼7.3pp

Mar

▼5.2pp

Apr

▲1.7pp

May

▼2.6pp

Jun

▼5.5pp



Average Daily Rate (₼)

2025

2024

Overall

Peak: ₼ 691
May

Min: ₼ 351
January

Average: ₼ 458

351

Jan

▼1.4%

357

Feb

▼1.8%

541

Mar

▲8.6%

361

Apr

▼5.8%

691

May

▲62.2%

460

Jun

▼38.4%

Hotels

Peak: ₼ 876
May

Min: ₼ 394
January

Average: ₼ 546

394

Jan

▼9.1%

406

Feb

▼6.8%

620

Mar

▲4.0%

423

Apr

▼11.7%

876

May

▲66.4%

603

Jun

▼41.9%

Apartments & Others

Peak: ₼ 218
January

Min: ₼ 199
May

Average: ₼ 205

218

Jan

▲11.5%

205

Feb

▲1.0%

200

Mar

▲8.7%

202

Apr

▲2.1%

199

May

▲4.1%

204

Jun

▼1.5%



HOSPITALITY SECTOR PERFORMANCE

Across Destinations

First Half Performance

- 1 Overall Performance (Hotels, Apartments & Others)
- 2 Hotels Performance
- 3 Apartments & Others Performance

Monthly Performance

- 1 Overall Performance (Hotels, Apartments & Others)
- 2 Hotels Performance
- 3 Apartments & Others Performance

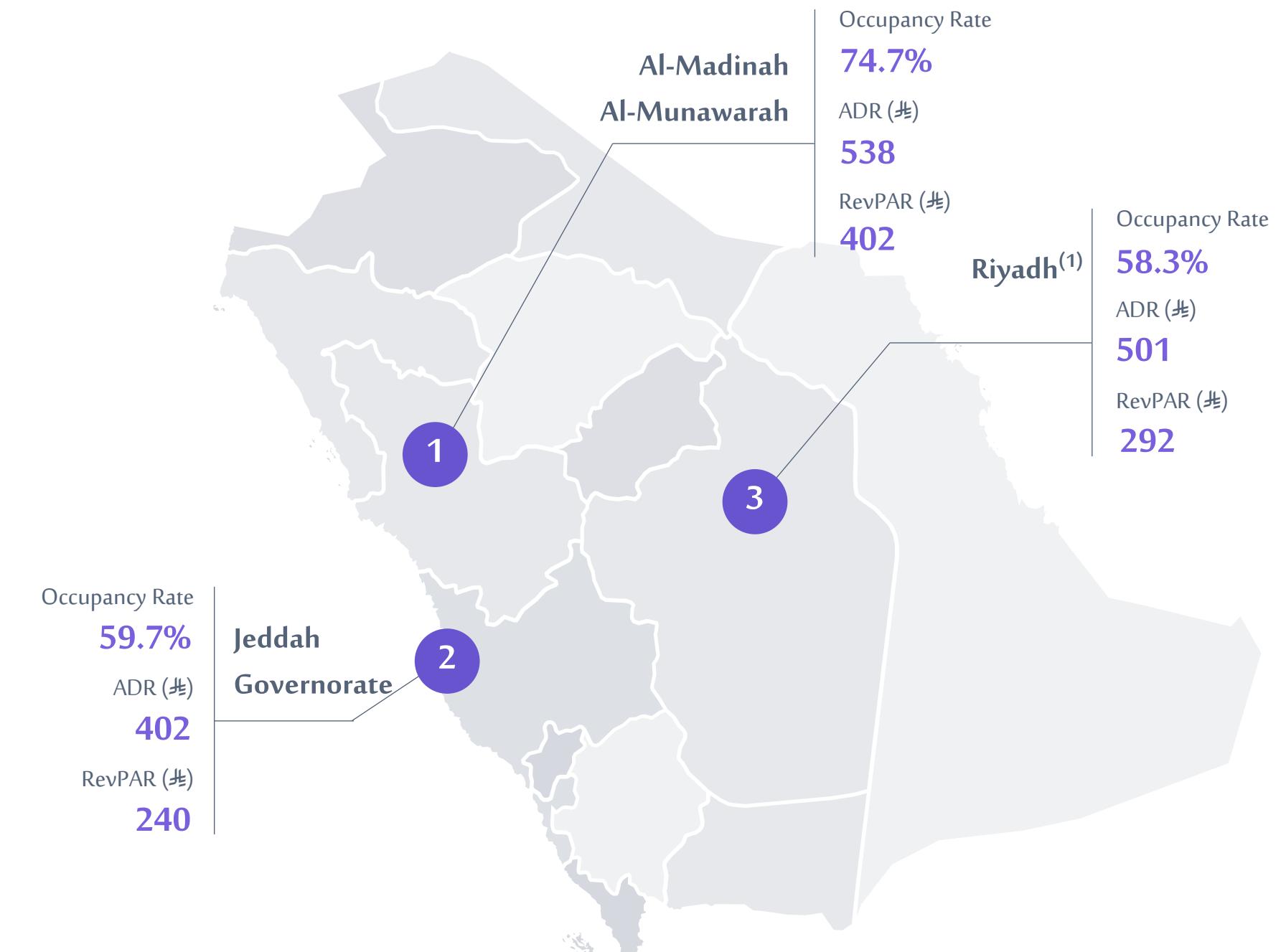
Al-Kur Tourist Village | Taif Governorate

First Half Performance – Overview

In H1 2025, the overall occupancy rate for tourism hospitality facilities in the Kingdom of Saudi Arabia, reached (56.6%) for hotels, apartments and others. Al-Madinah Al-Munawarah city led the way with the highest occupancy rate among the major cities and governorates at (74.7%), followed by Jeddah governorate at (59.7%). January 2025 emerged as the peak month for occupancy in H1 2025, reaching (63.4%).

Regarding revenue, the Average Daily Rate (ADR) for all tourism hospitality facilities in the Kingdom of Saudi Arabia averaged (₳ 458). Hotels recorded a higher ADR of (₳ 546), while apartments & others averaged (₳ 205). Consequently, the Revenue Per Available Room (RevPAR) stood at (SAR 259) in H1 2025.

Top Three Destinations by Performance



Overall Performance (Hotels, Apartments & Others) – First Half



Occupancy Rate (%)



Average Daily Rate (SAR)



Revenue Per Available Room (SAR)

	H1 2024	H1 2025	Growth Rate ⁽¹⁾	H1 2024	H1 2025	Growth Rate	H1 2024	H1 2025	Growth Rate
Overall KSA	56.9%	56.6%	▼0.3pp	458	458	▼0.0%	261	259	▼0.6%
Riyadh (2)	64.8%	58.3%	▼6.5pp	527	501	▼4.8%	342	292	▼14.4%
Makkah Al-Mukarramah	55.4%	56.4%	▲1.0pp	536	526	▼2.0%	297	296	▼0.2%
Jeddah Governorate	59.8%	59.7%	▼0.1pp	360	402	▲11.7%	215	240	▲11.5%
Taif Governorate	38.1%	35.3%	▼2.7pp	244	229	▼6.0%	93	81	▼12.8%
Al-Madinah Al-Munawarah	73.2%	74.7%	▲1.5pp	581	538	▼7.4%	425	402	▼5.5%
Buraydah & Unayzah	49.0%	47.8%	▼1.2pp	218	231	▲6.0%	107	110	▲3.4%
Al Ahsa Governorate	48.9%	46.3%	▼2.6pp	218	253	▲15.9%	107	117	▲9.7%
Dammam Metropolitan (3)	56.8%	55.3%	▼1.5pp	358	354	▼1.2%	204	196	▼3.8%
Abha & Khamis Mushait	40.0%	40.5%	▲0.5pp	191	189	▼1.3%	77	77	▼0.0%
Tabuk	47.6%	38.9%	▼8.7pp	194	193	▼0.2%	92	75	▼18.5%
Hail	47.5%	43.6%	▼3.9pp	215	257	▲19.9%	102	112	▲10.0%
Arar	51.2%	45.8%	▼5.4pp	186	214	▲15.0%	95	98	▲2.8%
Jazan	41.9%	44.2%	▲2.3pp	263	270	▲2.8%	110	119	▲8.4%
Najran	52.9%	54.1%	▲1.2pp	125	160	▲27.4%	66	86	▲30.3%
Al-Baha	36.6%	32.0%	▼4.5pp	211	179	▼15.3%	77	57	▼25.8%
Sakaka	43.6%	43.5%	▼0.2pp	167	179	▲6.8%	73	78	▲6.4%
Other (4)	40.6%	41.5%	▲0.9pp	228	291	▲27.8%	93	121	▲30.5%

Hotels Performance – First Half



Occupancy Rate (%)



Average Daily Rate (SAR)



Revenue Per Available Room (SAR)

	H1 2024			H1 2025			Growth Rate ⁽¹⁾	H1 2024			H1 2025			Growth Rate	H1 2024			H1 2025			Growth Rate
	Overall KSA	58.1%	58.5%	▲0.4pp	575	546	▼5.0%	334	320	▼4.4%	Riyadh (2)	60.7%	56.1%	▼4.5pp	966	801	▼17.1%	586	450	▼23.2%	
Makkah Al-Mukarramah	55.5%	56.5%	▲0.9pp	539	528	▼2.1%	299	298	▼0.5%	Jeddah Governorate	63.4%	62.4%	▼1.0pp	521	553	▲6.2%	330	345	▲4.5%		
Taif Governorate	33.9%	34.3%	▲0.4pp	520	419	▼19.4%	176	144	▼18.3%	Al-Madinah Al-Munawarah	74.7%	76.3%	▲1.6pp	597	551	▼7.6%	446	420	▼5.7%		
Buraydah & Unayzah	44.1%	48.1%	▲4.0pp	478	435	▼8.9%	211	209	▼0.8%	Al Ahsa Governorate	47.9%	49.0%	▲1.1pp	511	604	▲18.1%	245	296	▲20.9%		
Dammam Metropolitan (3)	56.1%	55.8%	▼0.3pp	433	447	▲3.3%	243	249	▲2.7%	Abha & Khamis Mushait	37.8%	36.2%	▼1.7pp	343	332	▼3.1%	130	120	▼7.4%		
Tabuk	32.4%	32.2%	▼0.2pp	305	268	▼12.1%	99	86	▼12.6%	Hail	41.8%	36.3%	▼5.5pp	377	460	▲21.9%	158	167	▲5.7%		
Arar	52.3%	47.2%	▼5.1pp	205	212	▲3.2%	107	100	▼6.9%	Jazan	37.6%	41.1%	▲3.5pp	346	358	▲3.6%	130	147	▲13.2%		
Najran	46.4%	44.3%	▼2.1pp	196	281	▲43.4%	91	124	▲36.9%	Al-Baha	32.9%	21.2%	▼11.7pp	323	311	▼3.6%	106	66	▼37.8%		
Sakaka	42.9%	39.1%	▼3.8pp	277	289	▲4.2%	119	113	▼5.1%	Other (4)	39.0%	41.7%	▲2.7pp	413	486	▲17.4%	161	202	▲25.6%		

Apartments & Others Performance – First Half



Occupancy Rate (%)



Average Daily Rate (SAR)



Revenue Per Available Room (SAR)

	H1 2024	H1 2025	Growth Rate ⁽¹⁾	H1 2024	H1 2025	Growth Rate	H1 2024	H1 2025	Growth Rate
Overall KSA	53.4%	50.4%	▲3.0pp	197	205	▲4.2%	105	103	▼1.6%
Riyadh (2)	68.8%	60.7%	▲8.1pp	215	245	▲13.9%	148	149	▲0.5%
Makkah Al-Mukarramah	32.6%	37.6%	▼5.0pp	154	147	▼4.2%	50	55	▲10.5%
Jeddah Governorate	55.5%	55.9%	▲0.5pp	190	212	▲11.5%	105	119	▲12.5%
Taif Governorate	39.8%	35.7%	▲4.0pp	162	166	▲2.3%	65	59	▼8.1%
Al-Madinah Al-Munawarah	49.1%	51.1%	▼2.0pp	310	291	▼6.0%	152	149	▼2.2%
Buraydah & Unayzah	51.0%	47.6%	▲3.4pp	152	153	▲1.2%	77	73	▼5.5%
Al Ahsa Governorate	49.3%	45.3%	▲3.9pp	164	182	▲11.3%	81	83	▲2.4%
Dammam Metropolitan (3)	57.5%	54.6%	▲2.9pp	291	240	▼17.5%	168	131	▼21.6%
Abha & Khamis Mushait	40.8%	42.5%	▼1.7pp	146	137	▼6.6%	60	58	▼2.7%
Tabuk	57.4%	46.2%	▲11.2pp	136	132	▼3.0%	78	61	▼22.0%
Hail	50.2%	46.8%	▲3.4pp	152	197	▲29.2%	77	92	▲20.5%
Arar	50.0%	43.7%	▲6.3pp	172	217	▲26.1%	86	95	▲10.2%
Jazan	47.5%	49.0%	▼1.5pp	174	153	▼11.7%	83	75	▼9.0%
Najran	57.1%	61.5%	▼4.4pp	89	92	▲3.3%	51	57	▲11.2%
Al-Baha	37.8%	34.3%	▲3.6pp	183	157	▼14.4%	69	54	▼22.5%
Sakaka	43.9%	46.1%	▼2.3pp	134	125	▼6.5%	59	58	▼1.7%
Other (4)	41.6%	41.4%	▲0.2pp	144	169	▲17.4%	60	70	▲16.9%

Overall Performance (Hotels, Apartments & Others) – Monthly



Occupancy Rate (%)

2025



Overall Performance (Hotels, Apartments & Others) – Monthly

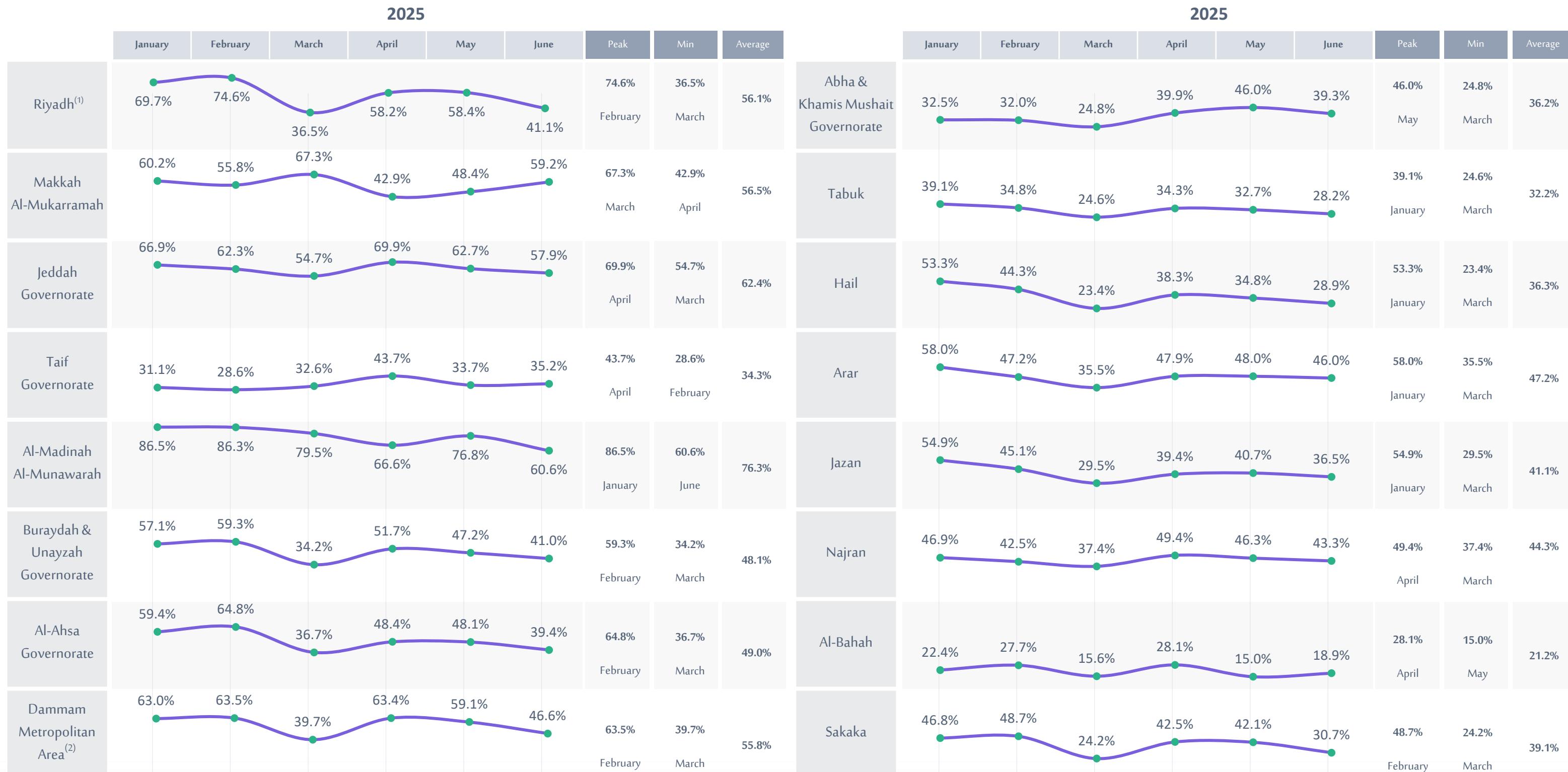


ADR



Hotels Performance – Monthly

Occupancy Rate (%)



Hotels Performance – Monthly



ADR

2025



2025



Apartments & Others Performance – Monthly



Apartments & Others Performance – Monthly



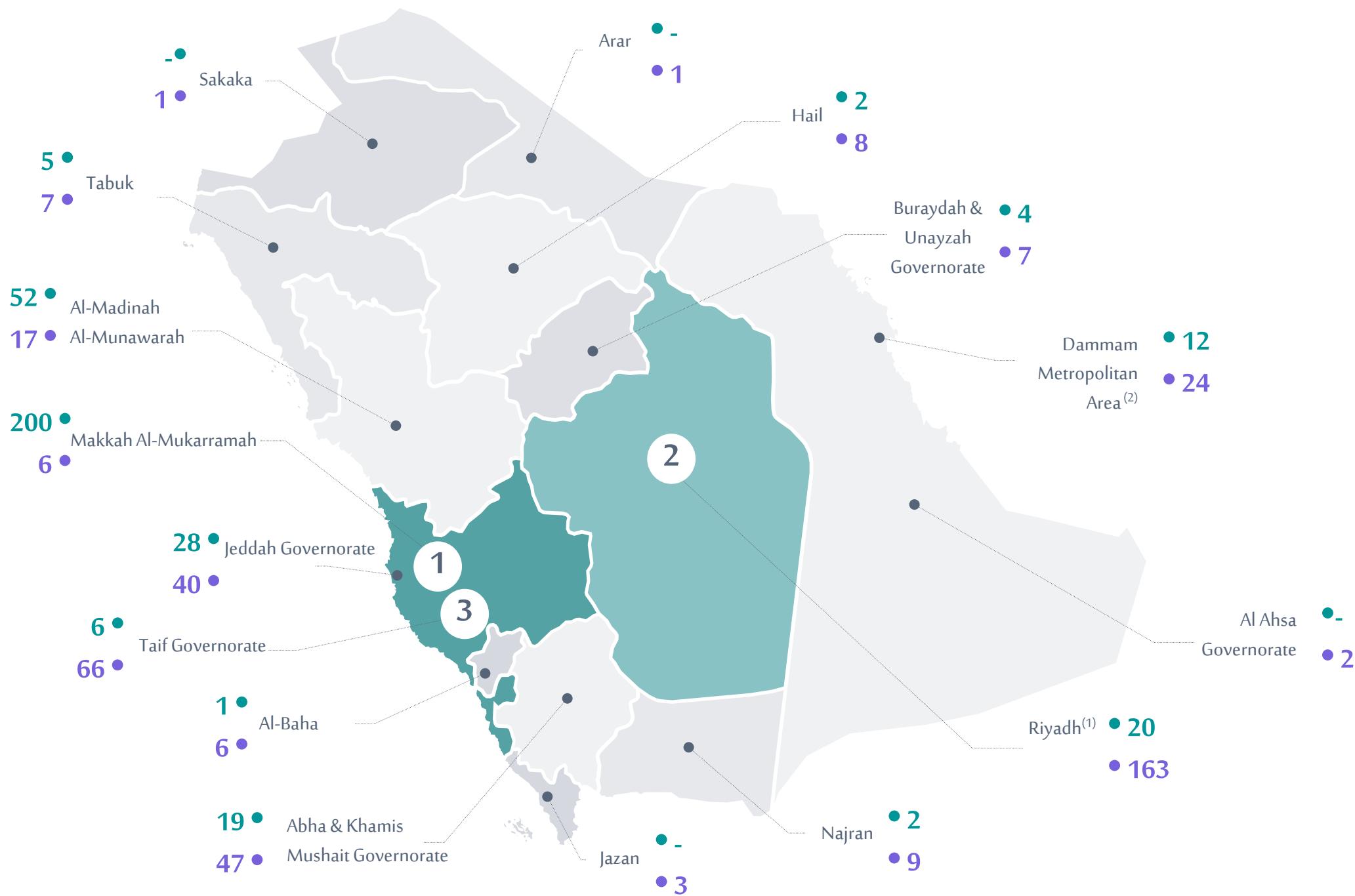
ADR





Newly Licensed Facilities

In H1 2025, Makkah Al-Mukaramah city had the highest share of newly issued licenses for tourism hospitality facilities across major cities and governorates, accounting for (27%) of the total. Riyadh⁽¹⁾ city followed, with a share of (24%); this includes Hotels, Apartments & Others.



Room Keys in Newly Licensed Facilities

In H1 2025, Makkah Al-Mukarramah city accounted for a substantial (61%) of all room keys in newly licensed tourism hospitality facilities across major cities and governorates. Riyadh⁽¹⁾ city followed with (11%); this includes Hotels, Apartments & Others



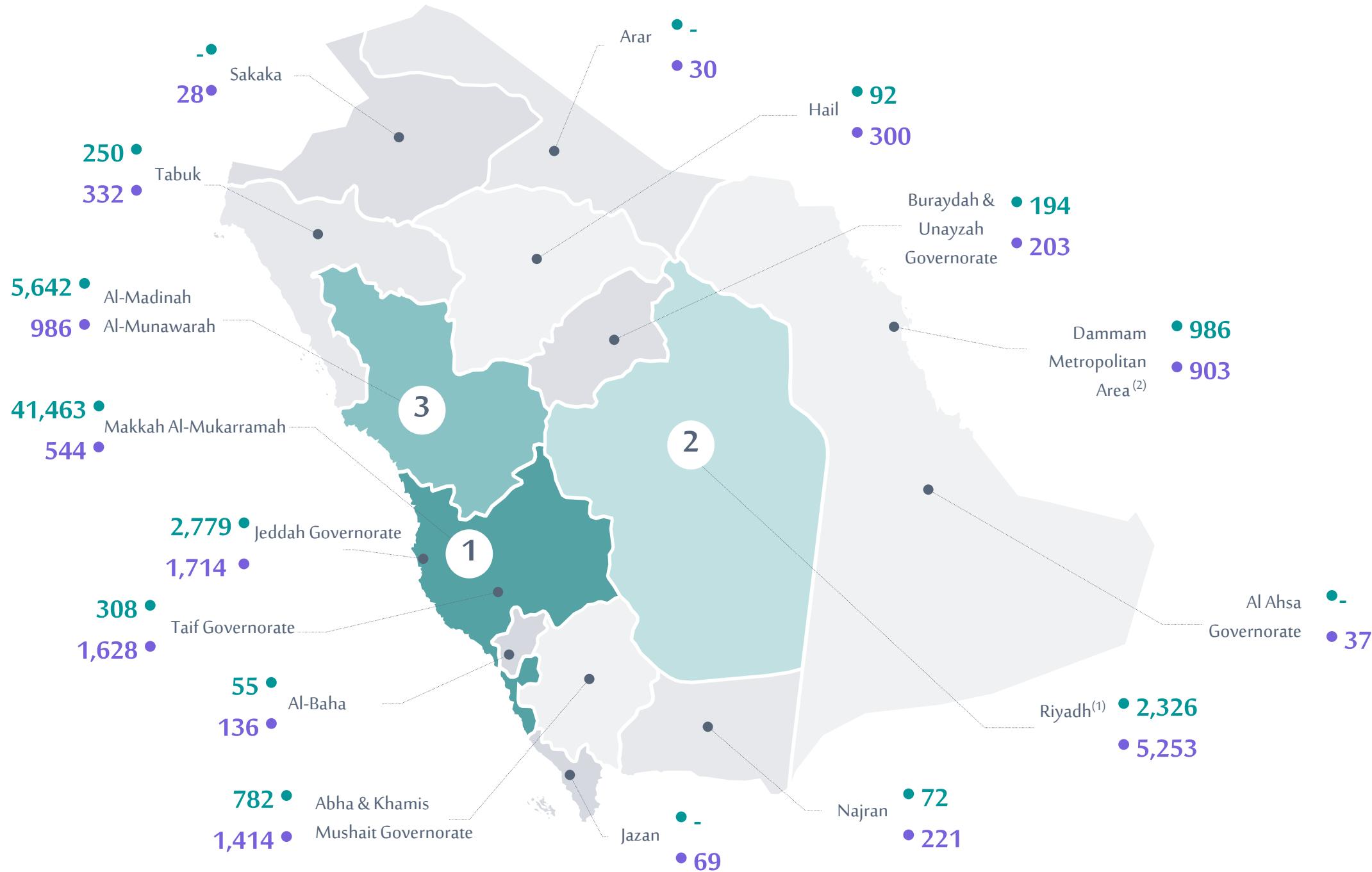
Hotels

Total Room Keys in Newly Licensed Facilities in KSA
57,619*



Apartments & Others

Total Room Keys in Newly Licensed Facilities in KSA
18,731*

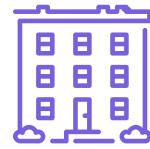


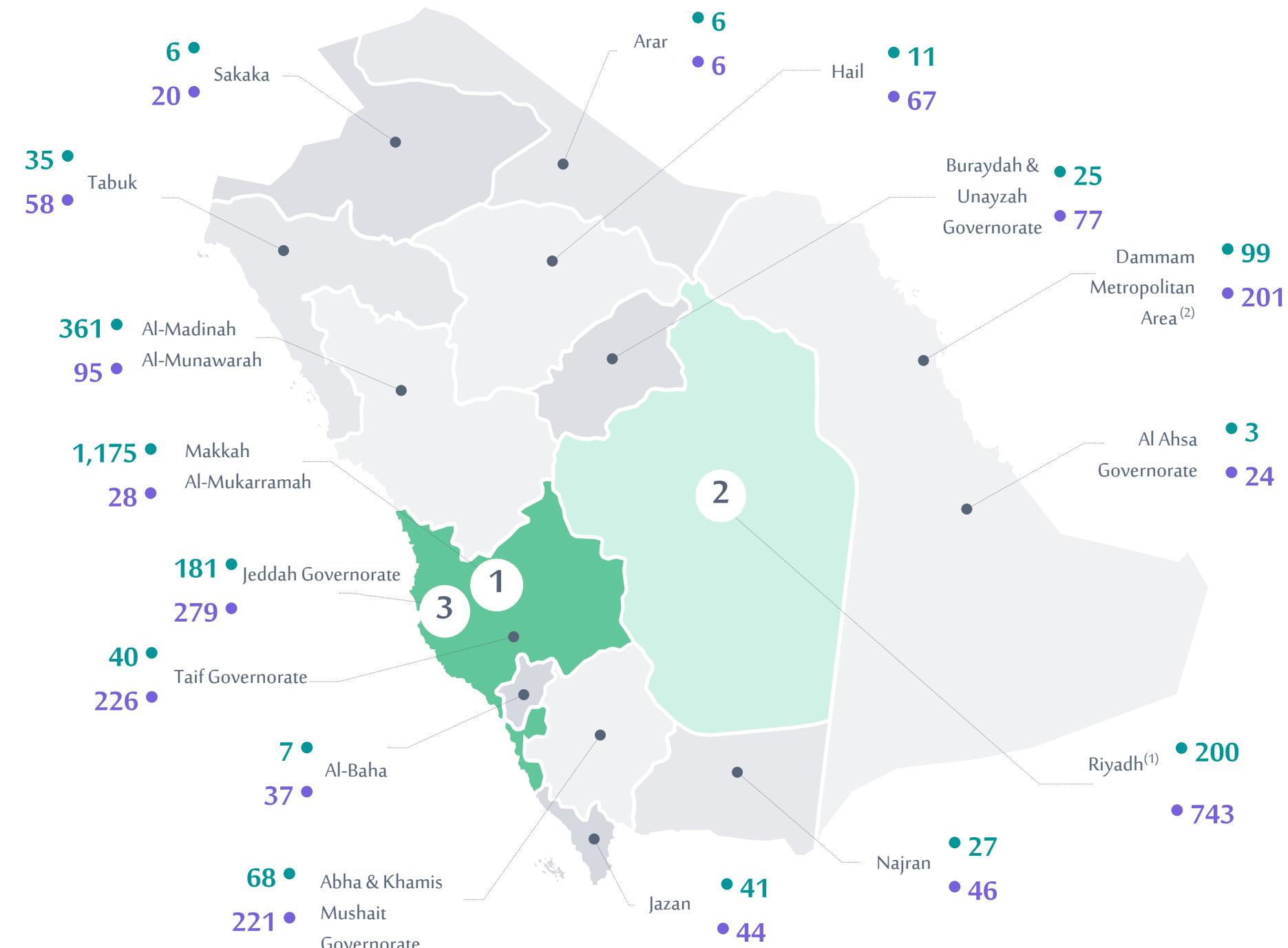
Licensed Facilities

As of H1 2025, Saudi Arabia had licensed a total of (5,326) tourism hospitality facilities, with Hotels accounting for (47%) and Apartments & Others making up (53%).

Among the Kingdom's major cities and governorates, Makkah Al-Mukarramah city recorded the highest number of licensed facilities, totaling (1,203) Notably, (98%) of these were Hotels. Riyadh⁽¹⁾ city followed in second place with (943) licensed facilities, where (79%) were Apartments & Others

 **Hotels**
Total Licensed Facilities in KSA
2,527*

 **Apartments & Others**
Total Licensed Facilities in KSA
2,799*



Room Keys in Licensed Facilities

As of H1 2025, a total of (544,879) room keys were recorded in licensed tourism hospitality facilities across Saudi Arabia, with Hotels comprising (83%) and Apartments & Others (17%)

Makkah Al-Mukarramah city notably contributed the highest number of room keys at (305,764), with (99%) exclusively in Hotels. Al-Madinah Al-Munawarah city ranked second, recording (64,569) room keys, (94%) of which were also Hotel-based

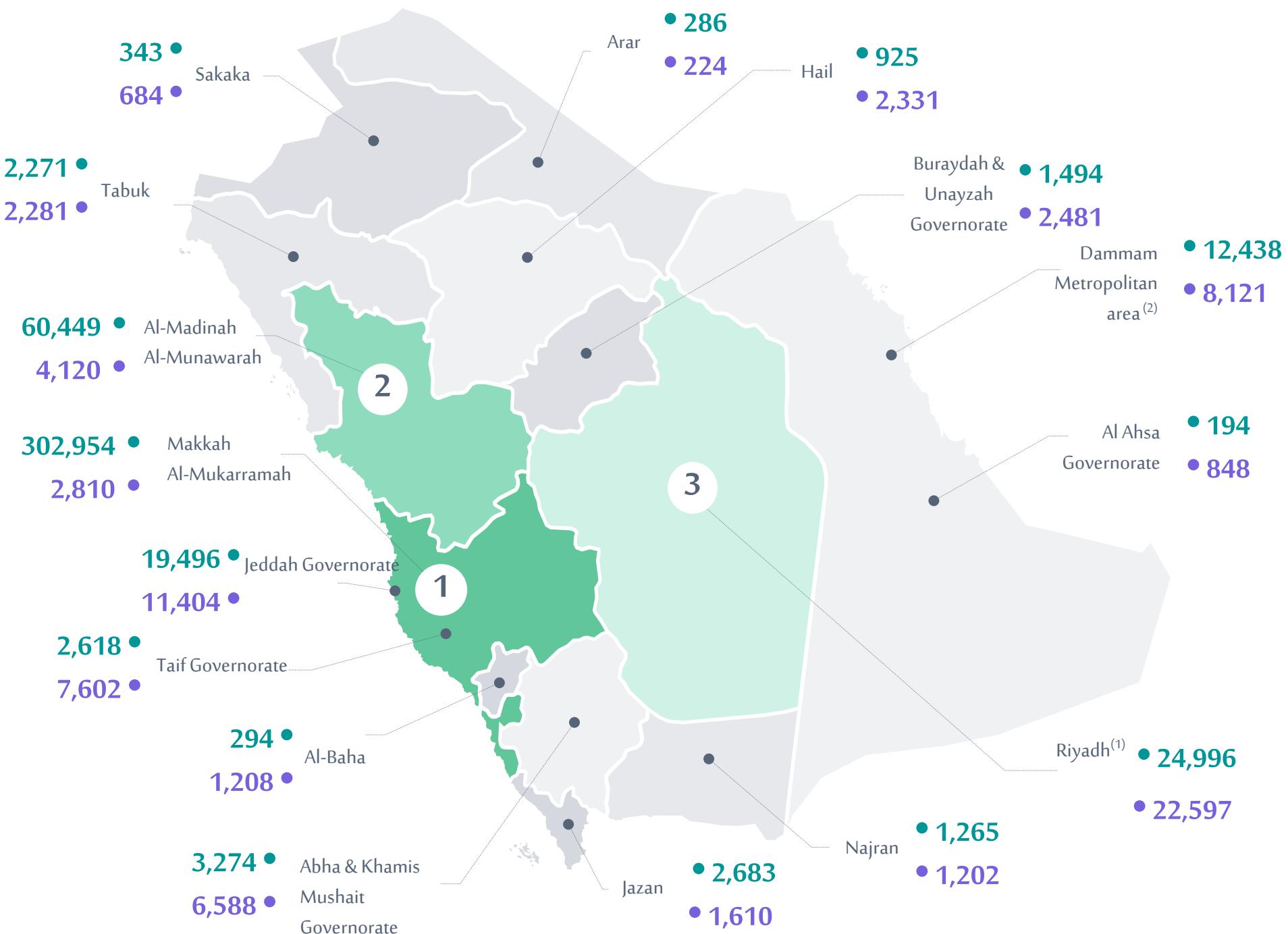


Hotels

Total Room Keys in Licensed Facilities in KSA
450,074*



Apartments & Others
Total Room Keys in Licensed Facilities in KSA
94,805*



Appendix

Newly Licensed Facilities & Room Keys in Newly Licensed Facilities - First Half 2025

Main Provinces	Hotels		Apartments & Others	
	Newly Licensed Facilities	Room Keys in Licensed Facilities	Newly Licensed Facilities	Room Keys in Licensed Facilities
Riyadh	26	2,537	197	6,237
Makkah	237	44,637	124	4,181
Al-Madinah	57	6,003	24	1,252
Al-Qassim	5	244	8	230
Eastern Province	24	1,646	55	1,991
Aseer	30	1,182	84	2,457
Tabuk	19	778	19	730
Hail	4	150	10	332
Northern Boarder	1	42	5	134
Jazan	6	178	14	392
Najran	4	130	11	287
Al-Baha	2	76	16	377
Al-Jouf	1	16	4	131
Overall KSA	416	57,619	571	18,731

Licensed Facilities & Room Keys in Licensed Facilities - As of the First Half 2025

Main Provinces	Hotels		Apartments & Others	
	Overall Licensed Facilities	Overall Room Keys in Licensed Facilities	Overall Licensed Facilities	Overall Room Keys in Licensed Facilities
Riyadh	219	25,840	861	25,856
Makkah	1,409	326,066	565	22,813
Al-Madinah	388	62,280	135	5,444
Al-Qassim	31	1,901	102	3,219
Eastern Province	145	16,234	360	13,748
Aseer	98	4,462	301	8,784
Tabuk	74	4,804	81	2,894
Hail	13	983	78	2,518
Northern Boarder	14	877	24	685
Jazan	78	3,976	118	3,675
Najran	35	1,647	59	1,645
Al-Baha	12	445	65	2,106
Al-Jouf	11	559	50	1,418
Overall KSA	2,527	450,074	2,799	94,805

Data Source

National Tourism Monitoring Platform (NTMP)

NTMP is the main source of data for the sector's performance in terms of occupancy rates, Average Daily Rate (ADR), and Revenue Per Available Room (RevPAR). The content of this report is based on the data available at the time of its preparation and is subject to retroactive changes and updates. The sector's performance data is updated daily to ensure accuracy and timeliness. Licensed tourism hospitality facilities across Saudi Arabia are committed to providing real-time data updates through direct integration with the National Tourism Monitoring Platform.

Tourism Activities Licensing Portal

The data presented in this report is sourced directly from official records maintained by the Ministry of Tourism through the Tourism Activities Licensing Portal. These records include licenses issued to tourism hospitality facilities in Saudi Arabia. The data is regularly updated to reflect changes in the licensing status of these facilities.

The Ministry of Tourism acknowledges its partners for their instrumental support for the sector's growth and development by sharing the required data, which has played a vital role in informing policy decisions and fostering sector innovation.

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Resort in Al-Jubaylah in Diriyah | Riyadh

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Ministry of Tourism
Data and Decision Support Deputyship
General Department of Studies and Knowledge
Research & Insights Department

+966 11 880 8555
Datadesk@mt.gov.sa