

HOSPITALITY SECTOR PERFORMANCE

First Quarter 2026

Ministry of Tourism | Data and Decision Support Deputyship

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

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Overall Performance (Hotels, Apartments & Others)

Hotels Performance

Apartments & Others Performance

Monthly Performance

Overall Performance (Hotels, Apartments & Others)

Hotels Performance

Apartments & Others Performance

Licensed Tourism Hospitality Facilities

Frist Quarter 2026

Newly Licensed Facilities

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As of the Frist Quarter 2026

Licensed Facilities

Room Keys in Licensed Facilities



Rijal Almaa Heritage Village | Aseer

INTRODUCTION

The Ministry of Tourism released its First Quarter performance report for the hospitality sector. This report views the key hospitality indicators of the Kingdom of Saudi Arabia in Q1 2026.

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.

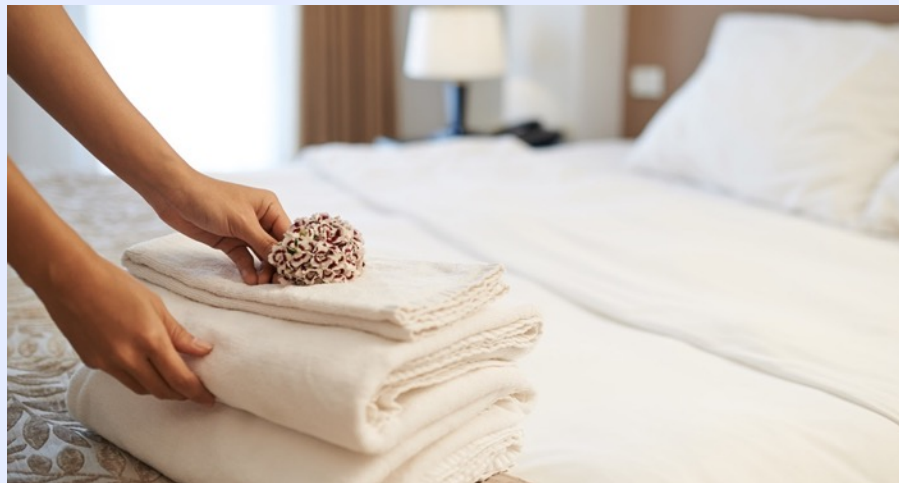
DEFINITIONS

Chalets | the Red Sea

Tourism Hospitality Facility Type

Hotels:

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



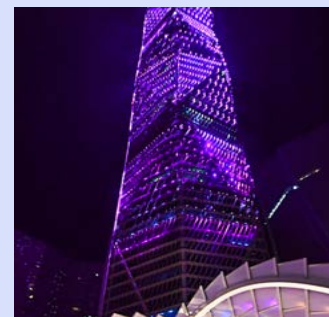
Apartments & Others:

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

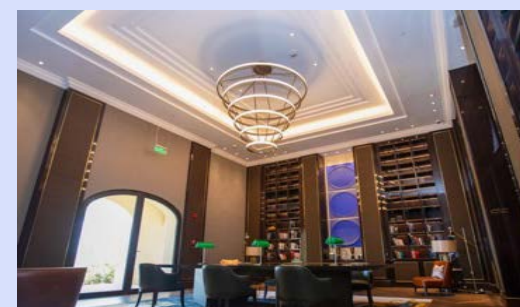


Average Daily Rate (ADR) (ﷲ):

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.

Revenue Per Available Room (RevPAR) (ﷲ):

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



Licensed Facilities:

Tourism hospitality facilities carrying active licenses until the end of Q1 2025 (31 March 2026).

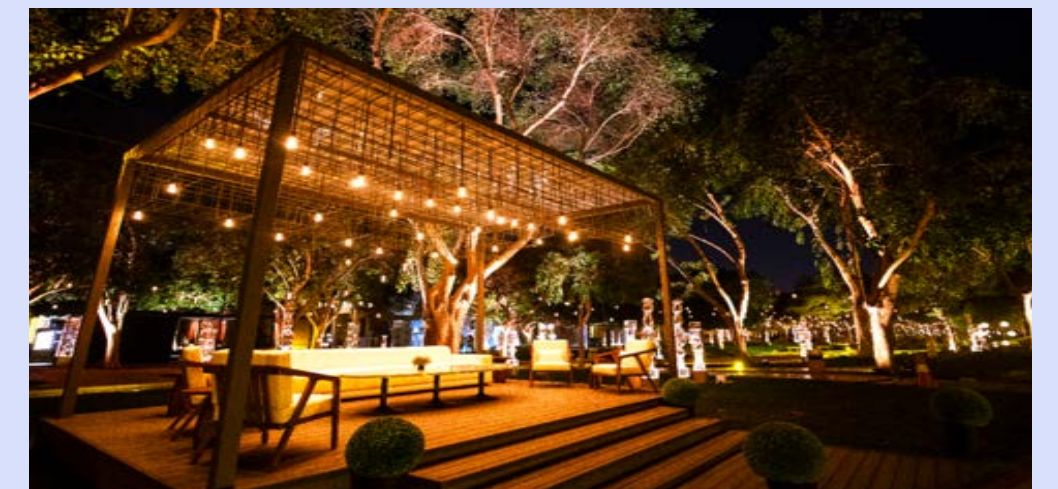


Room Keys:

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 Q1 2026 .



HOSPITALITY SECTOR PERFORMANCE

Across KSA

Jeddah Waterfront | Jeddah

Overall Hospitality Sector Performance in Saudi Arabia – First Quarter

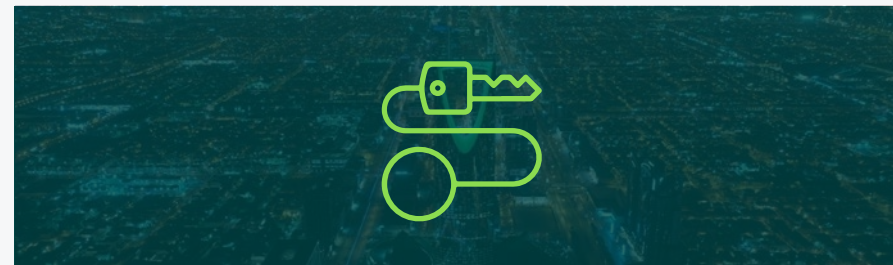
Performance of the first Quarter 2026



Licensed Facilities

6,122

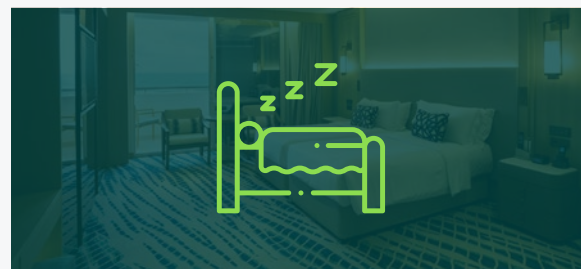
(359 newly licensed facilities in Q1 2026)



Room Keys in Licensed Facilities

About **616K**

(About 33K room keys in newly licensed facilities in Q1 2026)



Occupancy Rate

58.8%

▼ 1.5%pp



Average Daily Rate

376

▼ 9.6%



Revenue Per Available Room

221

▼ 11.8%

Insights

- In Q1 2026, Saudi Arabia's tourism hospitality facilities recorded an overall occupancy rate of (58.8%) for hotels, apartments & others.
- The Average Daily Rate (ADR) for all tourism hospitality facilities in Q1 2026 averaged (ﷲ 376). Consequently, the Revenue Per Available Room (RevPAR) stood at (ﷲ 221) in Q1 2026.
- As of Q1 2026, (6,122) tourism hospitality facilities were licensed, (48%) for hotels and (52%) for apartments & others across Saudi Arabia.
- As of Q1 2026, a total of about (616K) room keys in licensed tourism hospitality facilities were recorded, (82%) for hotels and (18%) for apartments & others across Saudi Arabia.

Overall Hospitality Sector Performance in Saudi Arabia – Monthly



Occupancy Rate (%)

Overall

Peak

January

61.8%

Min

February

56.5%

Average 58.8%

61.8%

56.5%

58.0%

Jan

▼ 1.6pp

Feb

▼ 2.9pp

Mar

▼ 0.1pp

Hotels

Peak

January

62.6%

Min

February

58.8%

Average 60.9%

62.6%

58.8%

61.0%

Jan

▼ 2.0pp

Feb

▼ 3.0pp

Mar

▼ 1.5pp

Apartments &
Others

Peak

January

59.0%

Min

March

47.0%

Average 51.6%

59.0%

48.6%

47.0%

Jan

▼ 0.2pp

Feb

▼ 2.8pp

Mar

▲ 5.3pp



Average Daily Rate (ﷲ)

Overall

Peak

March

459

Min

January

337

Average 376

337

351

459

Jan

▼ 3.8%

Feb

▼ 1.2%

Mar

▼ 15.0%

Hotels

Peak

March

542

Min

January

376

Average 423

376

384

542

Jan

▼ 4.5%

Feb

▼ 5.1%

Mar

▼ 12.3%

Apartments &
Others

Peak

January

214

Min

February

193

Average 206

214

192

207

Jan

▼ 1.6%

Feb

▼ 6.1%

Mar

▲ 3.3%

HOSPITALITY SECTOR PERFORMANCE

Across Destinations

First Quarter 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

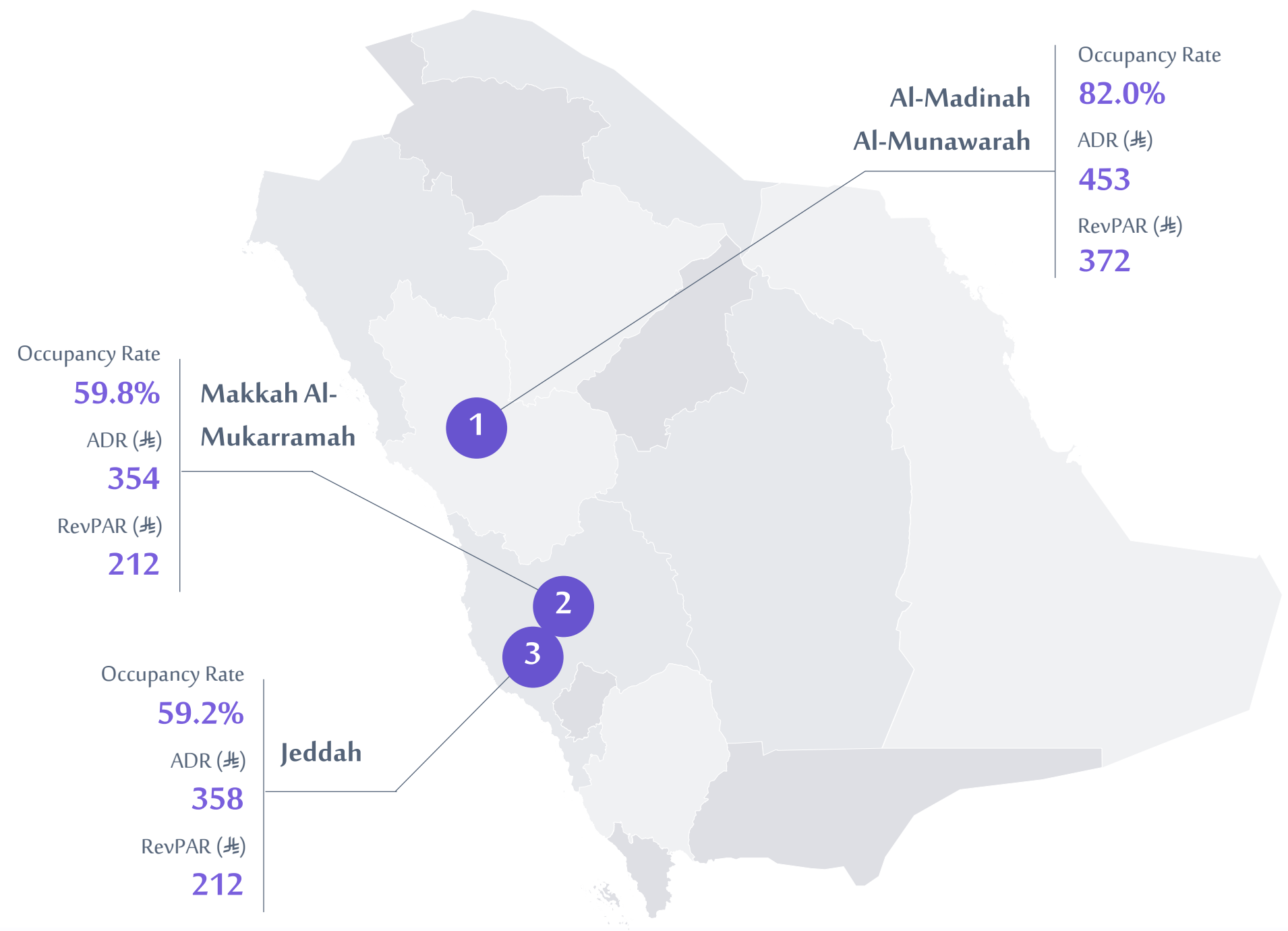
Al-Kur Tourist Village | Taif Governorate

First Quarter Performance – Overview

In Q1 2026, the overall occupancy rate for tourism hospitality facilities in the Kingdom of Saudi Arabia, reached (58.8%) 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 (82.0%), followed by Makkah Al-Mukarramah city at (59.8%). January 2026 emerged as the peak month for occupancy in Q1 2026, reaching (61.8%).

Regarding revenue, the Average Daily Rate (ADR) for all tourism hospitality facilities in the Kingdom of Saudi Arabia averaged (ﷲ 376). Hotels recorded a higher ADR of (ﷲ 423), while apartments & others averaged (ﷲ 206). Consequently, the Revenue Per Available Room (RevPAR) stood at (SAR 221) in Q1 2026.

Top Three Destinations by Performance



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



Occupancy Rate (%)



Average Daily Rate (ﷲ)



Revenue Per Available Room (ﷲ)

	Q1 2025	Q1 2026	Growth Rate ⁽¹⁾	Q1 2025	Q1 2026	Growth Rate	Q1 2025	Q1 2026	Growth Rate
Overall KSA	60.3%	58.8%	▼ 1.5pp	416	376	▼ 9.6%	251	221	▼ 11.8%
Riyadh (2)	61.0%	55.7%	▼ 5.2pp	519	486	▼ 6.5%	317	271	▼ 14.5%
Makkah Al Mukarramah	61.4%	59.8%	▼ 1.6pp	432	354	▼ 18.1%	266	212	▼ 20.3%
Jeddah Governorate	58.6%	59.2%	▲ 0.7pp	397	358	▼ 9.9%	232	212	▼ 8.8%
Taif Governorate	32.8%	32.8%	▲ 0.0pp	222	211	▼ 5.1%	73	69	▼ 5.0%
Al-Madinah Al-Munawarah	82.5%	82.0%	▼ 0.5pp	466	453	▼ 2.8%	384	372	▼ 3.3%
Buraydah & Unayzah	48.5%	52.9%	▲ 4.4pp	229	255	▲ 11.7%	111	135	▲ 21.7%
Al Ahsa Governorate	49.5%	49.6%	▲ 0.1pp	259	282	▲ 9.2%	128	140	▲ 9.4%
Dammam Metropolitan (3)	54.4%	52.2%	▼ 2.1pp	349	355	▲ 1.5%	190	185	▼ 2.5%
Abha & Khamis Mushait	36.4%	35.2%	▼ 1.2pp	161	160	▼ 0.5%	58	56	▼ 3.7%
Tabuk	38.7%	34.3%	▼ 4.3pp	186	216	▲ 16.2%	72	74	▲ 3.1%
Hail	44.8%	47.5%	▲ 2.7pp	277	260	▼ 6.2%	124	124	▼ 0.5%
Arar	45.0%	47.0%	▲ 2.0pp	222	221	▼ 0.2%	100	104	▲ 4.3%
Jazan	46.5%	45.9%	▼ 0.6pp	267	264	▼ 1.0%	124	121	▼ 2.3%
Najran	53.7%	54.4%	▲ 0.6pp	155	229	▲ 47.1%	83	124	▲ 48.8%
Al-Baha	27.0%	28.4%	▲ 1.4pp	156	155	▼ 0.5%	42	44	▲ 4.7%
Sakaka	43.7%	43.2%	▼ 0.6pp	180	176	▼ 2.5%	79	76	▼ 3.8%
Other (4)	42.1%	41.6%	▼ 0.5pp	285	330	▲ 15.5%	120	137	▲ 14.2%

ADR & RevPAR excluding VAT and Municipal Services Fees

- (1) PP: Percentage Point
 (2) Riyadh city includes Diriyah Governorate
 (3) The Dammam Metropolitan Area includes Dammam, Khobar, and Dhahran
 (4) Other includes cities and governorates not covered in this report

Hotels Performance – First Quarter



Occupancy Rate (%)

	Q1 2025	Q1 2026	Growth Rate ⁽¹⁾
Overall KSA	63.0%	60.9%	▼ 2.1pp
Riyadh (2)	60.0%	51.0%	▼ 9.0pp
Makkah Al Mukarramah	61.5%	59.9%	▼ 1.6pp
Jeddah Governorate	61.3%	60.8%	▼ 0.5pp
Taif Governorate	29.4%	28.3%	▼ 1.1pp
Al-Madinah Al-Munawarah	84.0%	84.0%	▼ 0.1pp
Buraydah & Unayzah	50.0%	49.4%	▼ 0.6pp
Al Ahsa Governorate	52.9%	55.6%	▲ 2.7pp
Dammam Metropolitan (3)	55.4%	50.3%	▼ 5.1pp
Abha & Khamis Mushait	29.6%	27.3%	▼ 2.4pp
Tabuk	32.8%	27.3%	▼ 5.5pp
Hail	39.1%	40.0%	▲ 0.9pp
Arar	47.1%	47.5%	▲ 0.5pp
Jazan	43.3%	43.5%	▲ 0.2pp
Najran	42.3%	42.4%	▲ 0.1pp
Al-Baha	21.8%	26.3%	▲ 4.5pp
Sakaka	39.7%	38.7%	▼ 0.9pp
Other (4)	41.3%	36.6%	▼ 4.7pp



Average Daily Rate (ﷲ)

Q1 2025	Q1 2026	Growth Rate
476	423	▼ 11.2%
844	783	▼ 7.2%
434	356	▼ 18.0%
534	473	▼ 11.5%
453	390	▼ 13.9%
476	471	▼ 1.1%
441	465	▲ 5.4%
623	610	▼ 2.1%
438	471	▲ 7.6%
297	268	▼ 9.7%
258	293	▲ 13.6%
474	444	▼ 6.3%
212	251	▲ 18.7%
351	329	▼ 6.2%
271	405	▲ 49.7%
258	286	▲ 10.6%
280	276	▼ 1.4%
474	618	▲ 30.5%



Revenue Per Available Room (ﷲ)

Q1 2025	Q1 2026	Growth Rate
300	258	▼ 14.2%
506	399	▼ 21.2%
267	213	▼ 20.2%
327	287	▼ 12.2%
133	110	▼ 17.2%
400	396	▼ 1.2%
221	230	▲ 4.1%
330	339	▲ 2.9%
243	237	▼ 2.3%
88	73	▼ 16.9%
85	80	▼ 5.5%
185	178	▼ 4.1%
100	119	▲ 19.9%
152	143	▼ 5.9%
114	172	▲ 50.0%
56	75	▲ 33.3%
111	107	▼ 3.7%
196	226	▲ 15.7%

ADR & RevPAR excluding VAT and Municipal Services Fees

- (1) PP: Percentage Point
 (2) Riyadh city includes Diriyah Governorate
 (3) The Dammam Metropolitan Area includes Dammam, Khobar, and Dhahran
 (4) Other includes cities and governorates not covered in this report

Apartments & Others Performance – First Quarter



Occupancy Rate (%)

	Q1 2025	Q1 2026	Growth Rate ⁽¹⁾
Overall KSA	50.7%	51.6%	▲ 1.0pp
Riyadh (2)	62.0%	60.1%	▼ 1.9pp
Makkah Al Mukarramah	40.4%	49.5%	▲ 9.1pp
Jeddah Governorate	54.9%	57.0%	▲ 2.2pp
Taif Governorate	34.0%	34.8%	▲ 0.7pp
Al-Madinah Al-Munawarah	58.2%	60.3%	▲ 2.2pp
Buraydah & Unayzah	47.6%	55.0%	▲ 7.4pp
Al Ahsa Governorate	48.3%	47.6%	▼ 0.7pp
Dammam Metropolitan (3)	53.0%	54.5%	▲ 1.4pp
Abha & Khamis Mushait	39.4%	39.2%	▼ 0.2pp
Tabuk	44.5%	42.4%	▼ 2.1pp
Hail	47.2%	50.9%	▲ 3.7pp
Arar	41.9%	45.9%	▲ 4.0pp
Jazan	51.4%	50.4%	▼ 0.9pp
Najran	62.2%	62.4%	▲ 0.2pp
Al-Baha	28.0%	29.0%	▲ 1.0pp
Sakaka	46.3%	45.1%	▼ 1.3pp
Other (4)	42.7%	45.3%	▲ 2.6pp



Average Daily Rate (ﷲ)

	Q1 2025	Q1 2026	Growth Rate
Overall KSA	209	206	▼ 1.3%
Riyadh (2)	244	251	▲ 2.7%
Makkah Al Mukarramah	150	129	▼ 13.9%
Jeddah Governorate	225	216	▼ 4.2%
Taif Governorate	153	152	▼ 1.0%
Al-Madinah Al-Munawarah	305	245	▼ 19.5%
Buraydah & Unayzah	153	162	▲ 6.1%
Al Ahsa Governorate	184	186	▲ 0.8%
Dammam Metropolitan (3)	244	227	▼ 7.0%
Abha & Khamis Mushait	116	115	▼ 0.9%
Tabuk	130	139	▲ 7.3%
Hail	218	198	▼ 9.3%
Arar	237	171	▼ 28.0%
Jazan	162	168	▲ 3.7%
Najran	92	92	▲ 0.9%
Al-Baha	134	137	▲ 2.3%
Sakaka	128	135	▲ 5.3%
Other (4)	171	177	▲ 3.1%



Revenue Per Available Room (ﷲ)

	Q1 2025	Q1 2026	Growth Rate
Overall KSA	106	106	▲ 0.6%
Riyadh (2)	151	151	▼ 0.5%
Makkah Al Mukarramah	61	64	▲ 5.7%
Jeddah Governorate	124	123	▼ 0.5%
Taif Governorate	52	53	▲ 1.1%
Al-Madinah Al-Munawarah	177	148	▼ 16.5%
Buraydah & Unayzah	73	89	▲ 22.6%
Al Ahsa Governorate	89	88	▼ 0.6%
Dammam Metropolitan (3)	130	124	▼ 4.4%
Abha & Khamis Mushait	46	45	▼ 1.5%
Tabuk	58	59	▲ 2.3%
Hail	103	101	▼ 2.2%
Arar	99	78	▼ 21.1%
Jazan	83	85	▲ 1.8%
Najran	57	58	▲ 1.1%
Al-Baha	37	40	▲ 5.9%
Sakaka	59	61	▲ 2.4%
Other (4)	73	80	▲ 9.4%

ADR & RevPAR excluding VAT and Municipal Services Fees

- (1) PP: Percentage Point
 (2) Riyadh city includes Diriyah Governorate
 (3) The Dammam Metropolitan Area includes Dammam, Khobar, and Dhahran
 (4) Other includes cities and governorates not covered in this report

Overall Performance (Hotels, Apartments & Others) – Monthly



Occupancy Rate (%)



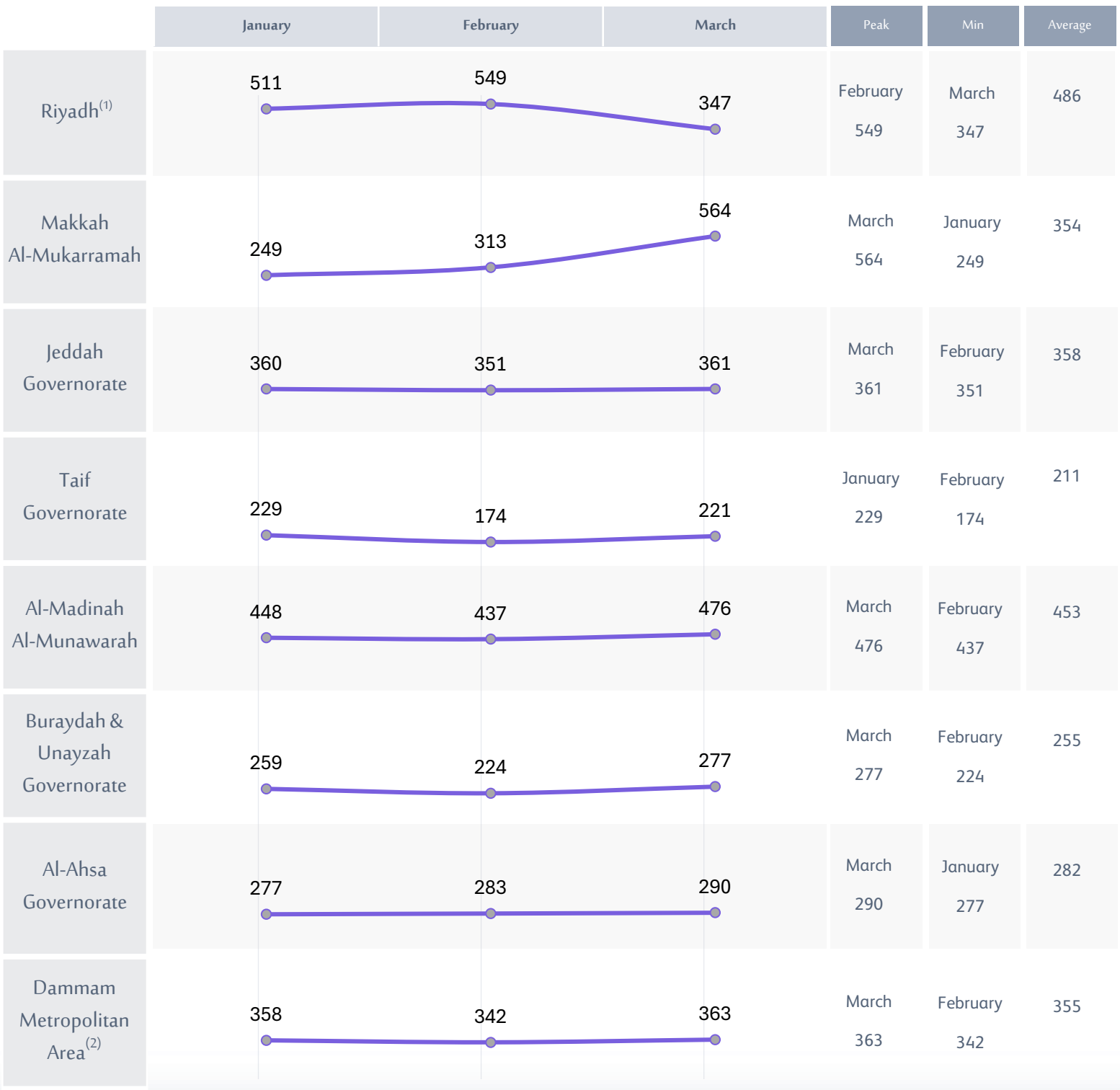
(1) Riyadh city includes Diriyah Governorate
(2) The Dammam Metropolitan Area includes Dammam, Khobar, and Dhahran

Overall Performance (Hotels, Apartments & Others) – Monthly



ADR

2026



2026



Hotels Performance – Monthly

2026



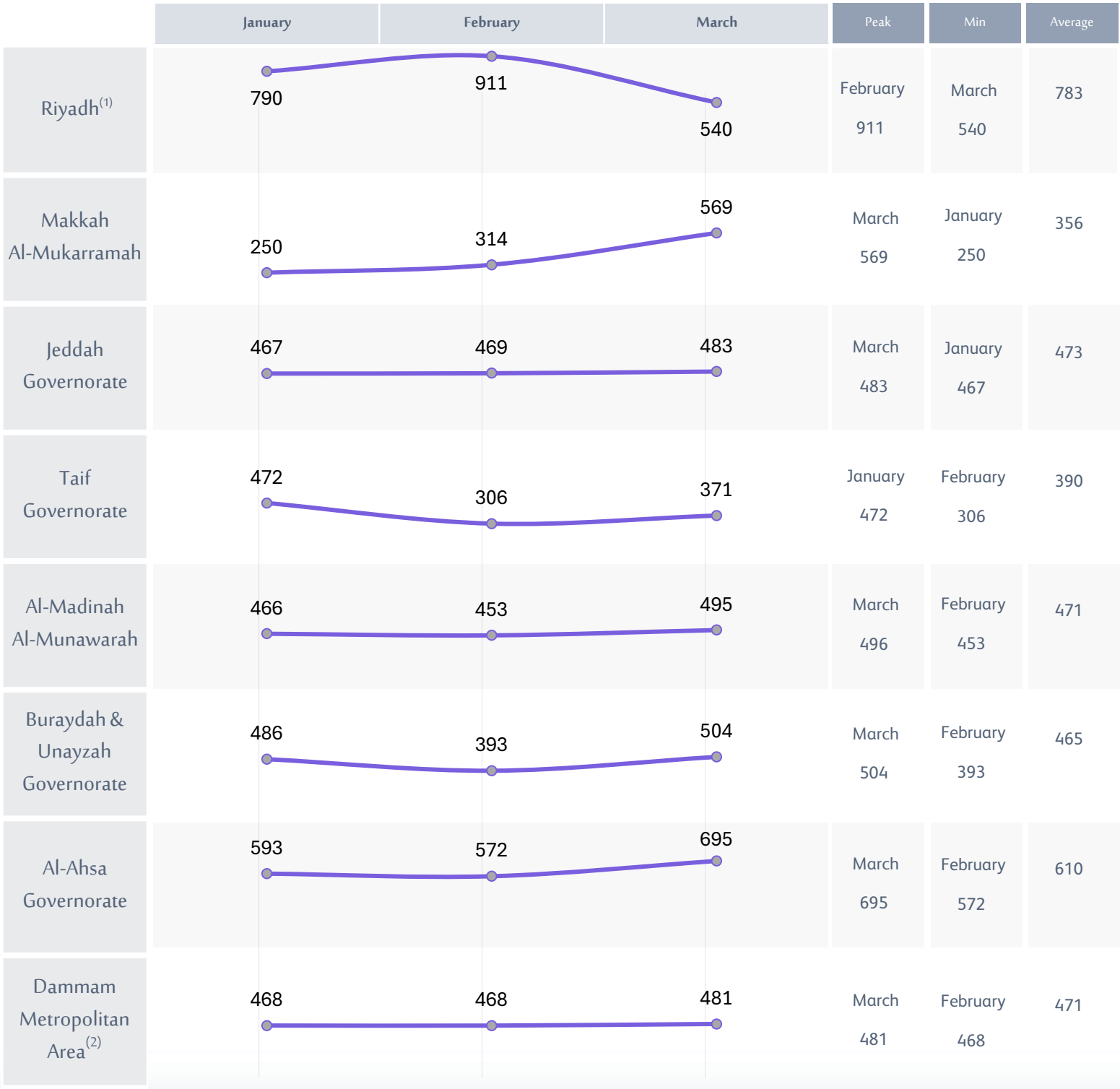
Occupancy Rate (%)

2026



Hotels Performance – Monthly

2026



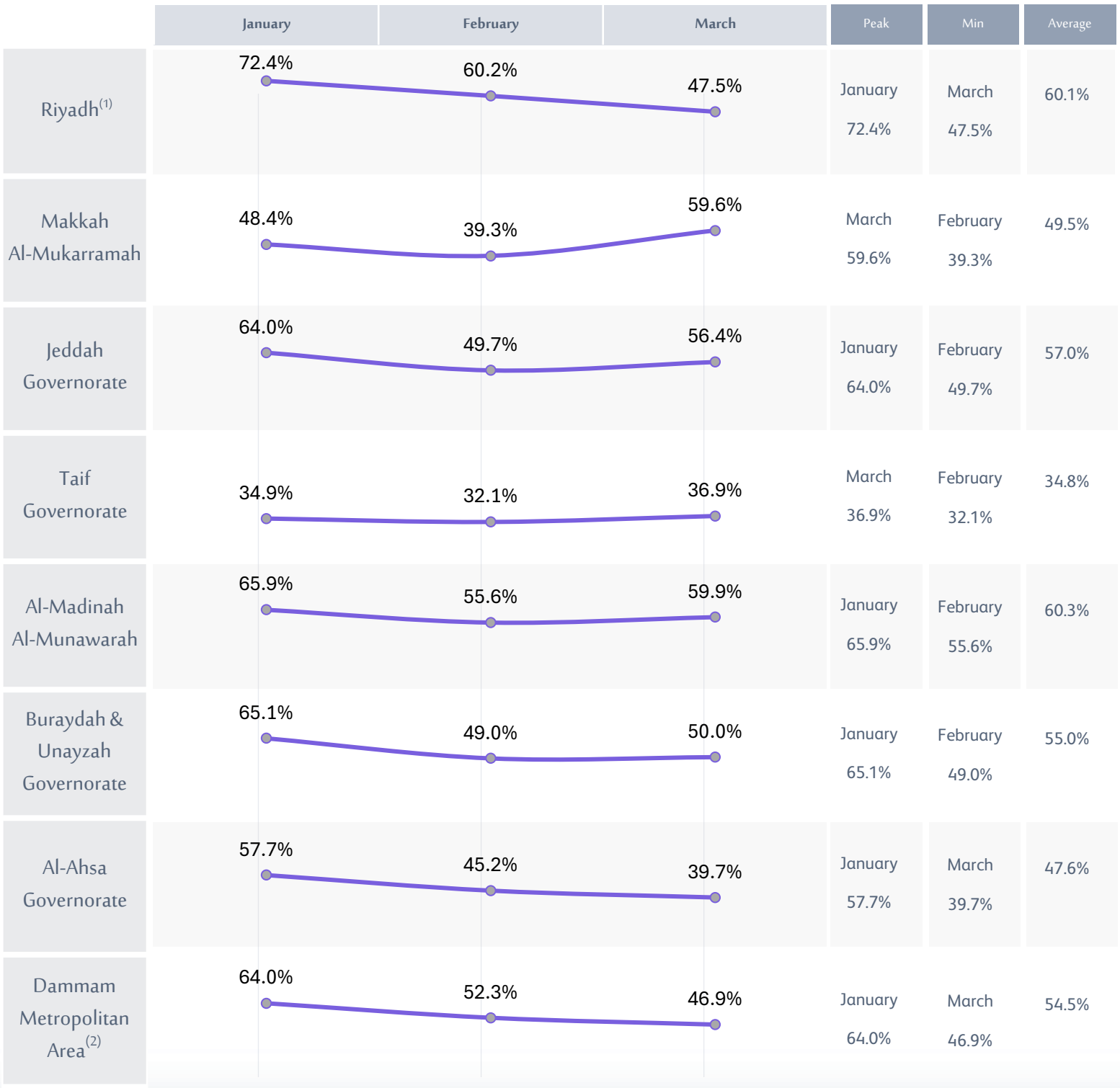
ADR

2026



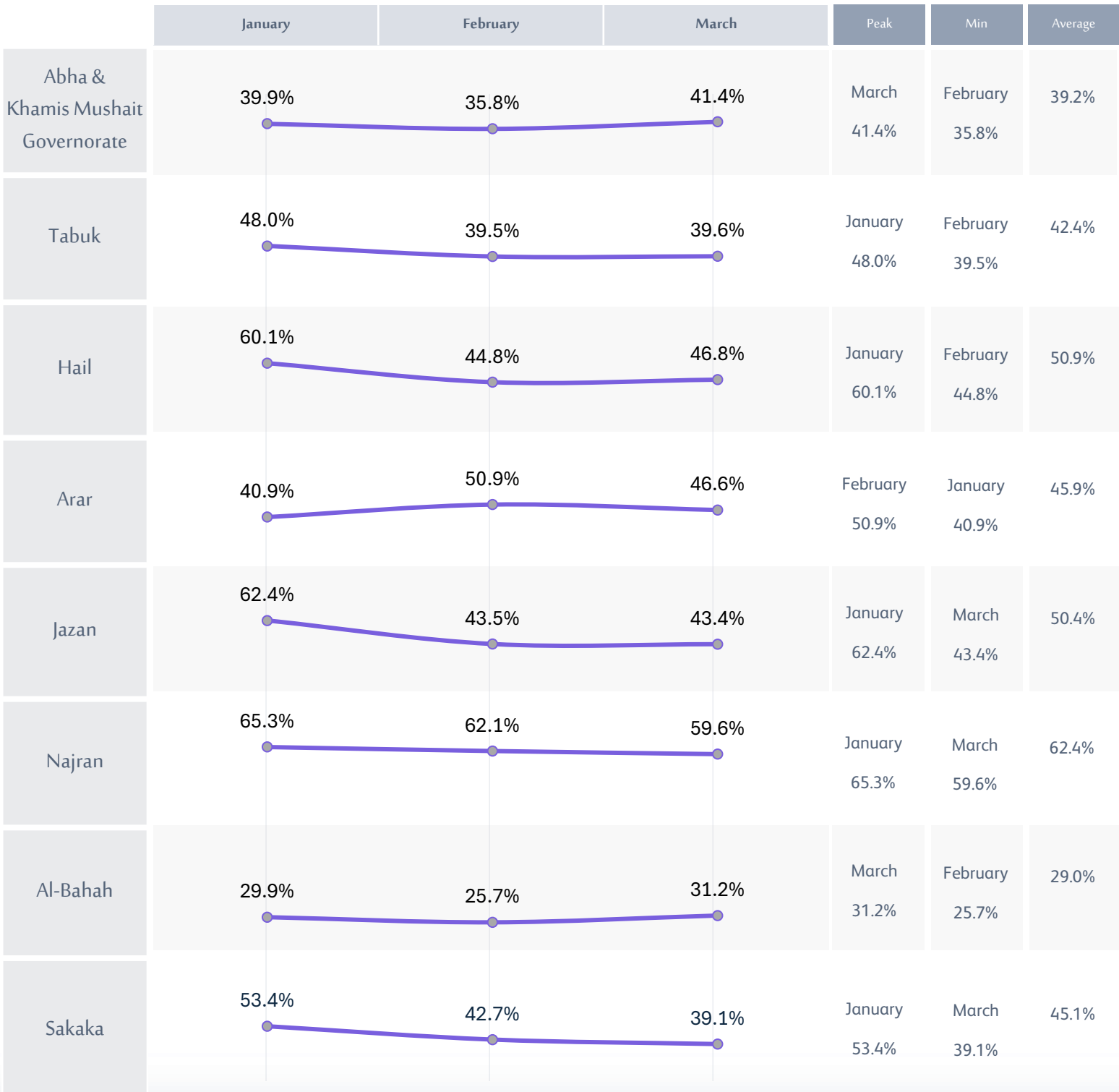
Apartments & Others Performance – Monthly

2026



Occupancy Rate (%)

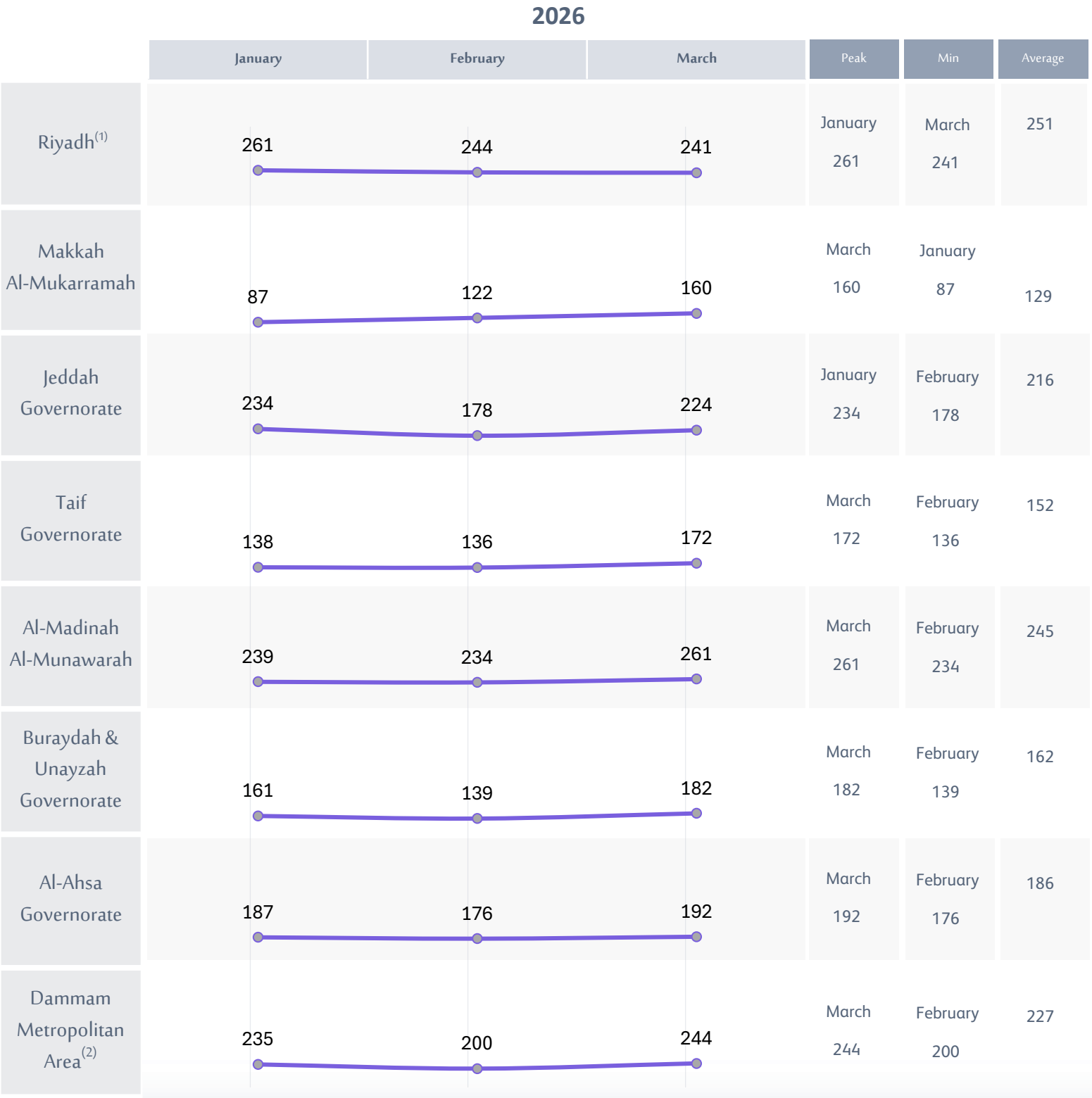
2026



Apartments & Others Performance – Monthly



ADR



LICENSED TOURISM HOSPITALITY FACILITIES

First
Quarter
2026

1

Newly Licensed Facilities

2

Room Keys in Newly Licensed Facilities

As of the First
Quarter
2026

1

Licensed Facilities

2

Room Keys in Licensed Facilities

Airstream Recreational Vehicle | AIUla

Newly Licensed Facilities

In Q1 2026, Makkah Al-Mukarramah city had the highest number of newly licensed tourism hospitality facilities accounting for (34%) of total issued licenses, followed by Al-Madinah Al-Munawarah city with (17%); this includes hotels, apartments & others.



Hotels

Total Newly Licensed Facilities
in KSA

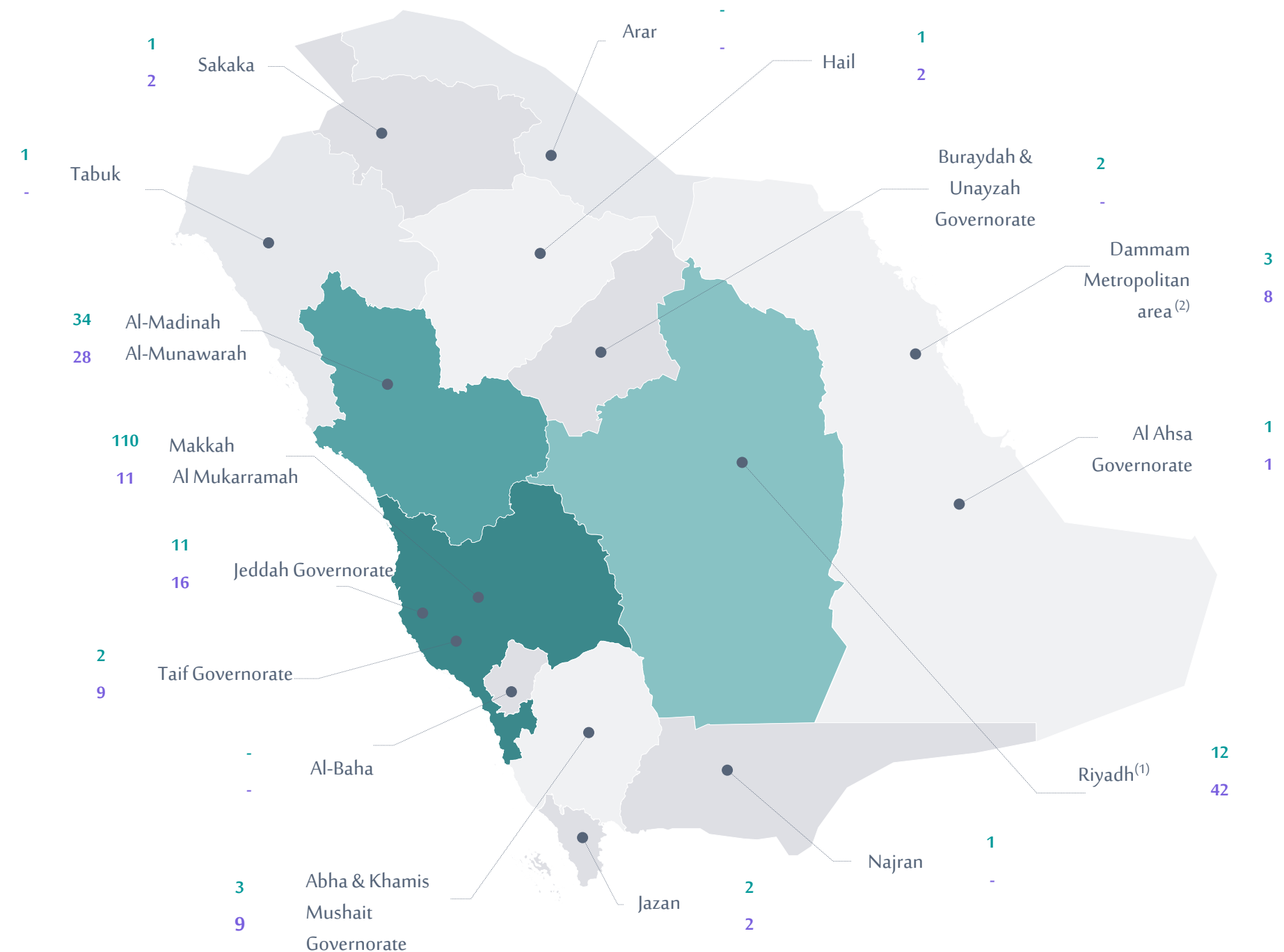
201*



Apartments & Others

Total Newly Licensed Facilities
in KSA

158*



Newly Licensed Facilities: Tourism hospitality facilities newly licensed in Q1 2026.

(1) Riyadh city includes Diriyah Governorate

(2) The Dammam Metropolitan Area includes Dammam, Khobar, and Dhahran

(*) The number reflects the total number of newly licensed facilities in KSA

Room Keys in Newly Licensed Facilities

Makkah Al-Mukarramah city accounted for substantial (59%) of total room keys in newly licensed tourism hospitality facilities in Q1 2026, followed by Al-Madinah Al-Munawarah city with (15%) this includes hotels, apartments & others.



Hotels

Total Room Keys in Newly Licensed Facilities in KSA

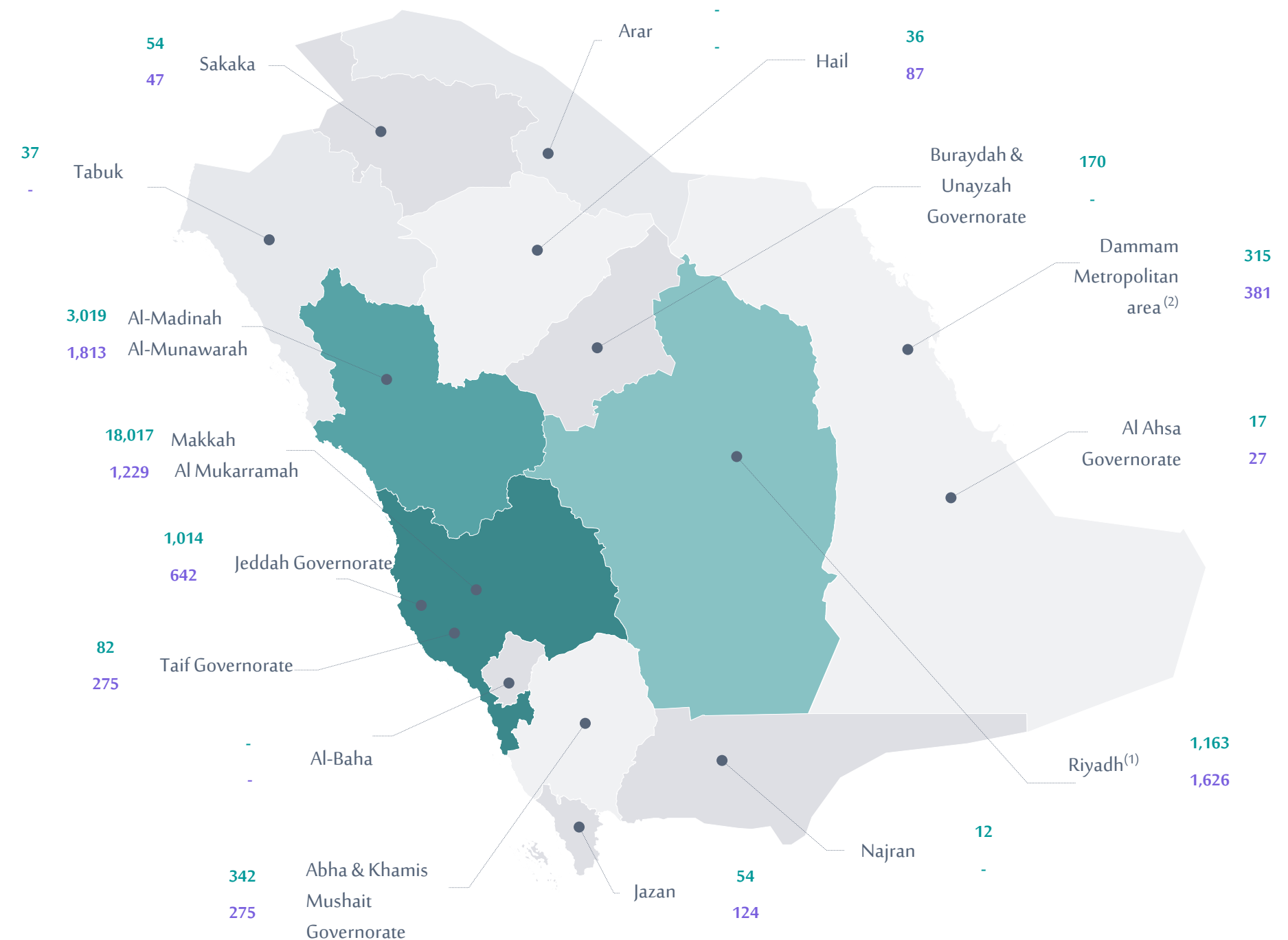
25,245*



Apartments & Others

Total Room Keys in Newly Licensed Facilities in KSA

7,450*



Newly Licensed Facilities: Tourism hospitality facilities newly licensed in Q1 2026.

(1) Riyadh city includes Diriyah Governorate

(2) The Dammam Metropolitan Area includes Dammam, Khobar, and Dhahran

(*) The number reflects the total room keys in newly licensed facilities in KSA

Licensed Facilities

As of Q1 2026, (6,122) tourism hospitality facilities were licensed across Saudi Arabia, (48%) for hotels and (52%) for apartment & others.

Makkah Al-Mukarramah city recorded the highest number of licensed tourism hospitality facilities among the major cities and governorates in the Kingdom; a total of (1,443) facilities were licensed, (97%) of which were for hotels only.

Riyadh⁽¹⁾ city placed second with (1,082) licensed tourism hospitality facilities, (78%) for apartments & others only.



Hotels

Total Licensed Facilities
in KSA

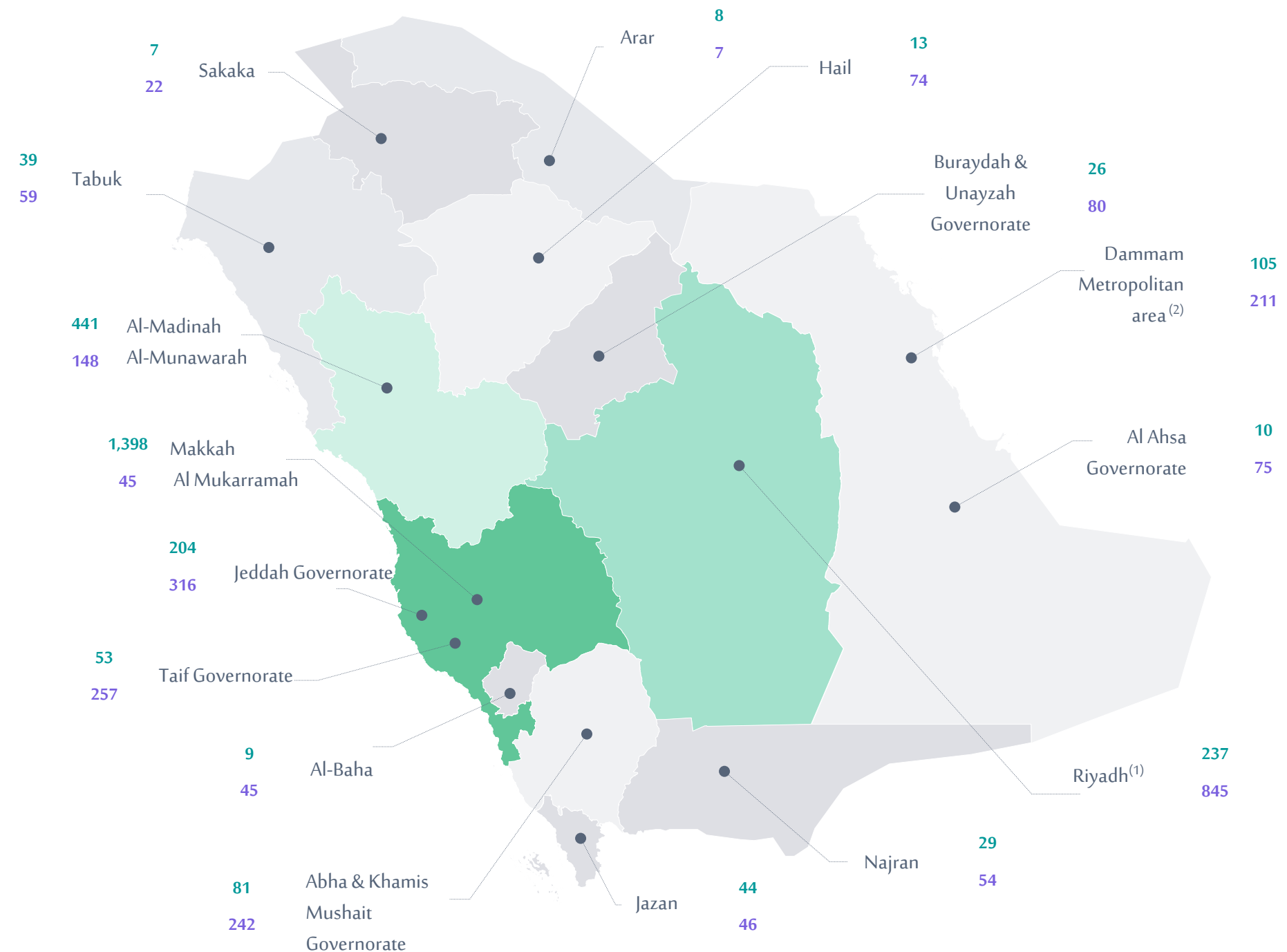
2,963 *



Apartments & Others

Total Licensed Facilities
in KSA

3,159 *



Licensed Facilities: Tourism hospitality facilities carrying active licenses until the end of Q1 2026 (31 March)

(1) Riyadh city includes Diriyah Governorate

(2) The Dammam Metropolitan Area includes Dammam, Khobar, and Dhahran

(*) The number reflects the total number of licensed facilities in KSA

Room Keys in Licensed Facilities

As of Q1 2026, a total of (615,862) room keys in licensed tourism hospitality facilities were recorded, (82%) for hotels and (18%) for apartments & others across Saudi Arabia.

Makkah Al-Mukarramah city placed first with a total of (344,425) room keys in licensed tourism hospitality facilities, (99%) of which were for hotels only.

Al-Madinah Al-Munawarah city placed second with (76,907) room keys in licensed tourism hospitality facilities, (91%) for hotels only.



Hotels

Total Licensed Facilities in
KSA

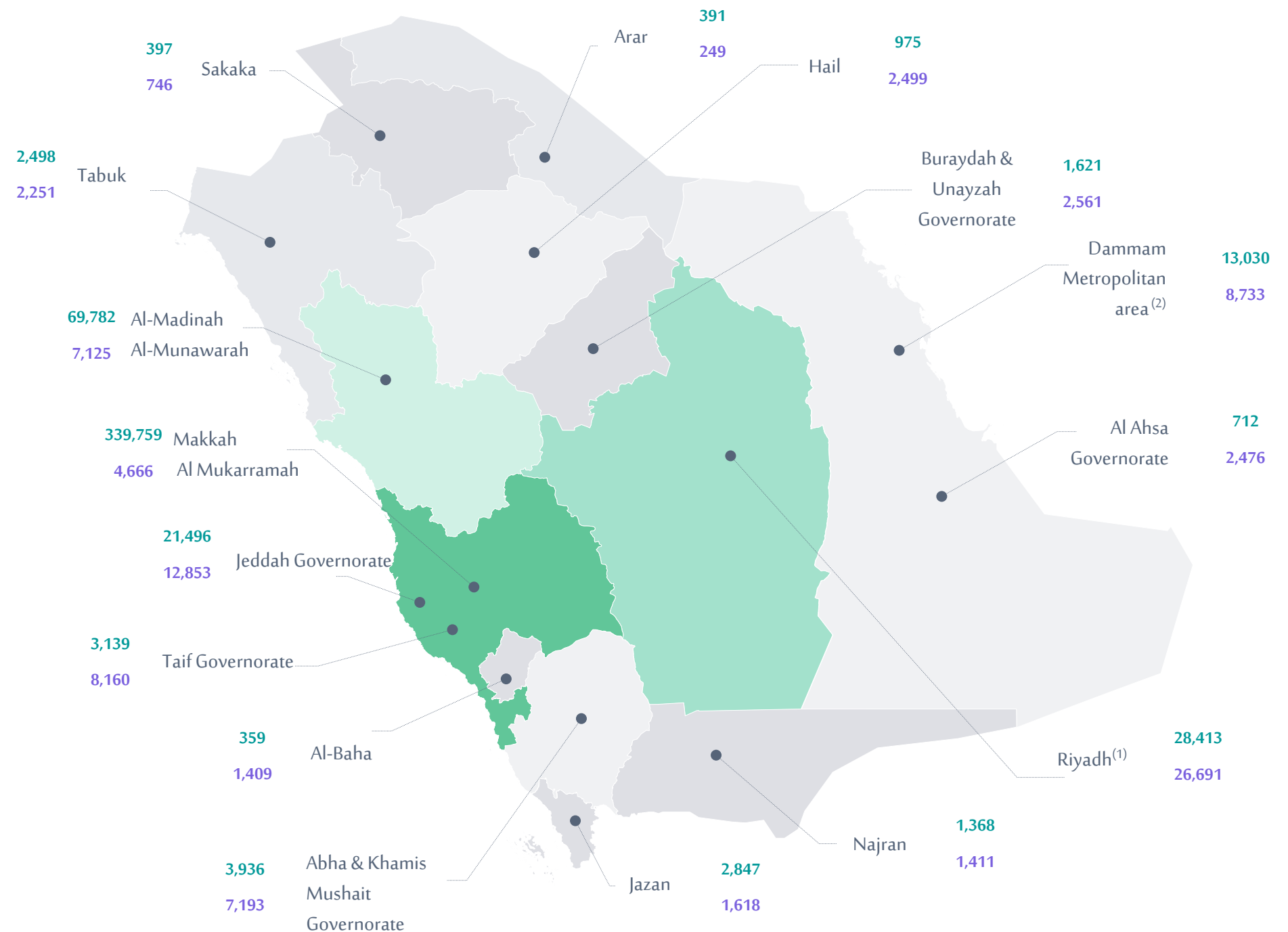
506,005*



Apartments & Others

Total Licensed Facilities in
KSA

109,857*



Licensed Facilities: Tourism hospitality facilities carrying active licenses until the end of Q1 2026 (31 March)

(1) Riyadh city includes Diriyah Governorate

(2) The Dammam Metropolitan Area includes Dammam, Khobar, and Dhahran

(*) The number reflects the total room keys in licensed facilities in KSA

Appendix 1 | Newly Licensed Facilities & Room Keys in Newly Licensed Facilities

	 Hotels		 Apartments & Others	
Provinces	Newly Licensed Facilities	Room Keys in Licensed Facilities	Newly Licensed Facilities	Room Keys in Licensed Facilities
Riyadh	13	1,193	52	1,954
Makkah	125	19,410	37	2,199
Al-Madinah	37	3,128	28	1,813
Al-Qassim	2	170	-	-
Eastern Province	9	560	18	713
Aseer	4	372	10	311
Tabuk	3	193	3	73
Hail	1	36	3	128
Northern Boarder	-	-	1	18
Jazan	4	80	2	124
Najran	1	12	-	-
Al-Baha	-	-	-	-
Al-Jouf	2	91	4	117
Overall KSA	201	25,245	158	7,450

Appendix 2 | Licensed Facilities & Room Keys in Licensed Facilities

	 Hotels		 Apartments & Others	
Provinces	Overall Licensed Facilities	Overall Room Keys in Licensed Facilities	Overall Licensed Facilities	Overall Room Keys in Licensed Facilities
Riyadh	256	29,149	984	30,707
Makkah	1,669	365,503	652	26,811
Al-Madinah	472	71,742	189	8,481
Al-Qassim	32	2,028	104	3,276
Eastern Province	158	17,225	390	15,149
Aseer	111	5,132	322	9,445
Tabuk	85	5,961	89	3,054
Hail	14	1,017	87	2,752
Northern Boarder	17	1,029	28	786
Jazan	85	4,309	120	3,672
Najran	37	1,750	69	1,902
Al-Baha	14	510	71	2,226
Al-Jouf	13	650	54	1,596
Overall KSA	2,963	506,005	3,159	109,857

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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