

HOSPITALITY SECTOR PERFORMANCE

In The Kingdom of Saudi Arabia

First Half of 2026

Ministry of Tourism | Data & Decision Support Deputyship

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

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Overall Performance (Hotels, Apartments & Others)

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Licensed Tourism Hospitality Facilities

First Half 2026

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As of the First Half of 2026

Licensed Facilities

Room Keys in Licensed Facilities



Rijal Almaa Heritage Village | Aseer

INTRODUCTION

The Ministry of Tourism is pleased to present the First Half-Year performance report for the hospitality sector. This report views the key hospitality indicators of the Kingdom of Saudi Arabia in H1 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.



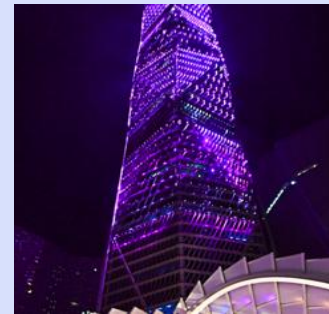
Apartments & Others:

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

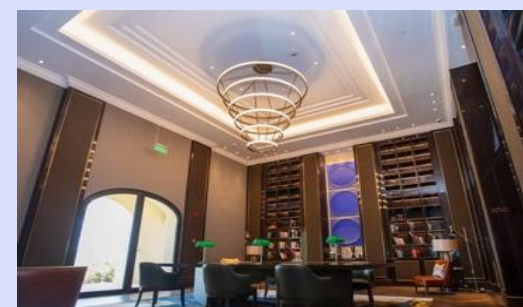


Average Daily Rate (ADR) (﷼):

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) (﷼):

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 H1 2026 (30 Jun 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 H1 2026.



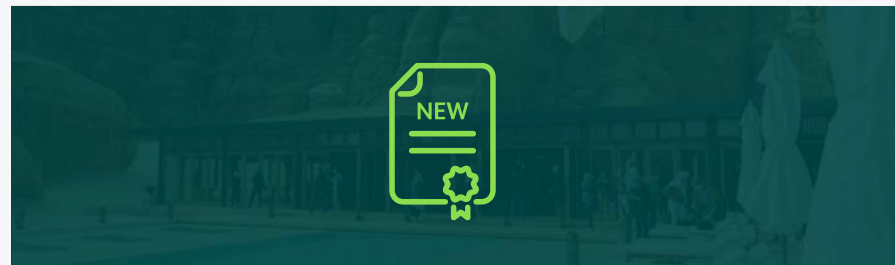
HOSPITALITY SECTOR PERFORMANCE

Across KSA

Jeddah Waterfront | Jeddah

Overall Hospitality Sector Performance in Saudi Arabia – First Half

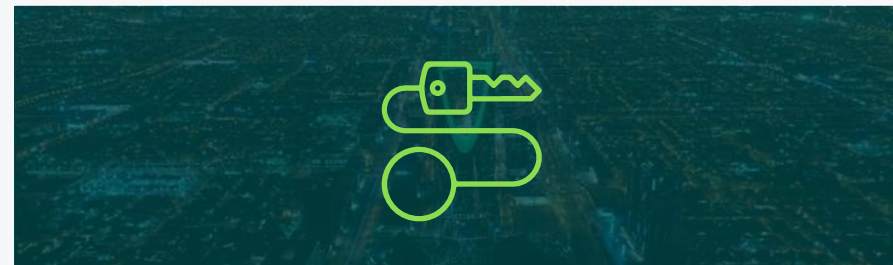
Performance of the First Half of 2026



Licensed Facilities

6,278

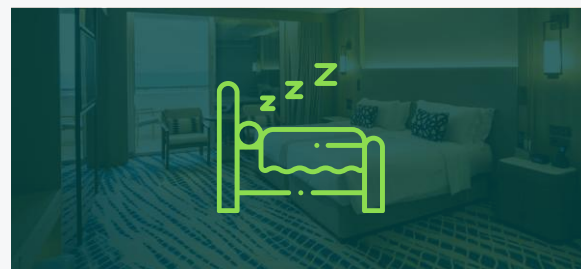
(580 newly licensed facilities in H1 2026)



Room Keys in Licensed Facilities

about **623K**

(Over 44K keys in newly licensed facilities in H1 2026)



Occupancy Rate

54.8%

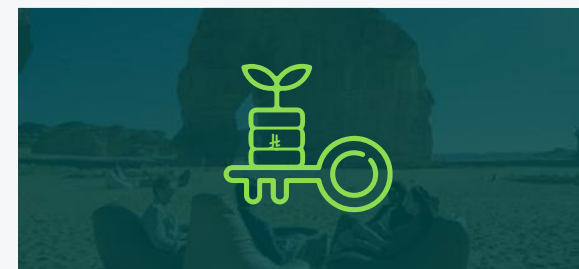
(1.7pp ▼)



Average Daily Rate

413ﷵ

(9.8% ▼)



Revenue Per Available

Room

227ﷵ

(12.5% ▼)

Insights

- In H1 2026, Saudi Arabia's tourism accommodation facilities recorded an overall occupancy rate of (54.8%) for hotels, apartments & others.
- The Average Daily Rate (ADR) for all tourism accommodation facilities in H1 2026 averaged (413ﷵ). Consequently, the Revenue Per Available Room (RevPAR) stood at (227ﷵ).
- As of H1 2026, (6,278) tourism accommodation facilities were licensed, (48%) for hotels and (52%) for apartments & others across Saudi Arabia.
- As of H1 2026, a total of about (623K) room keys in licensed tourism accommodation facilities were recorded, (82%) for hotels and (18%) for apartments & others across Saudi Arabia.

Overall Hospitality Sector Performance in Saudi Arabia – Monthly



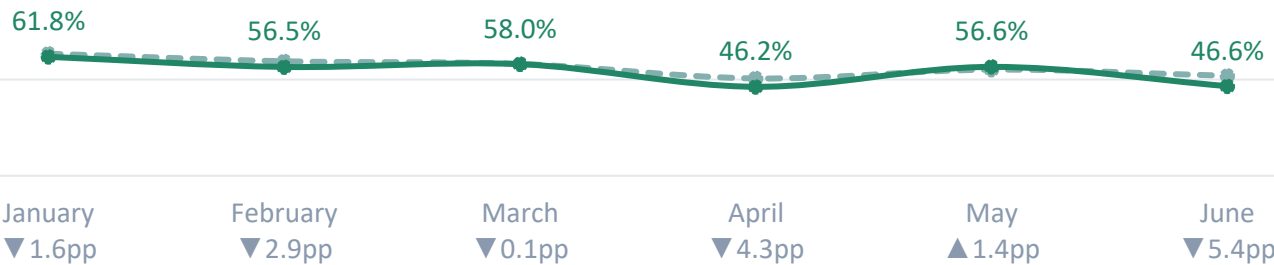
Occupancy Rate (%)

Overall

Peak: 61.8%
January

Min: 46.2%
April

Average: 54.8%

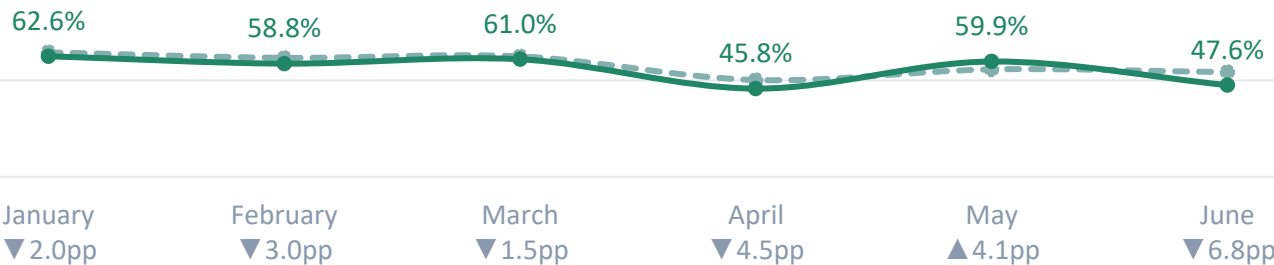


Hotels

Peak: 62.6%
January

Min: 45.8%
April

Average: 56.7%

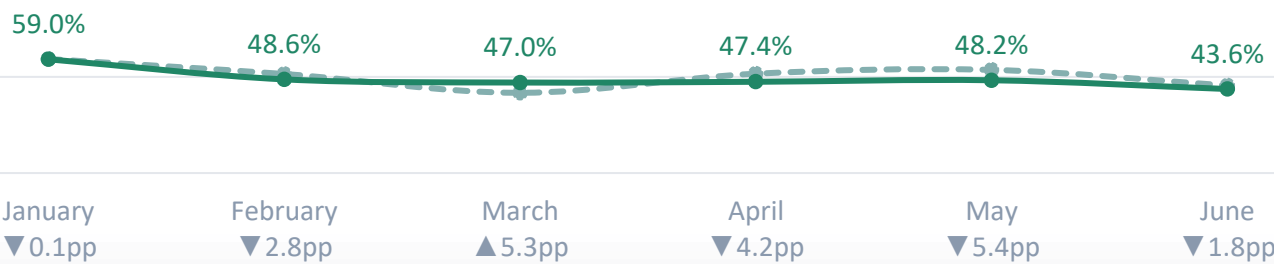


Apartments & Others

Peak: 59.0%
January

Min: 43.6%
June

Average: 49.1%



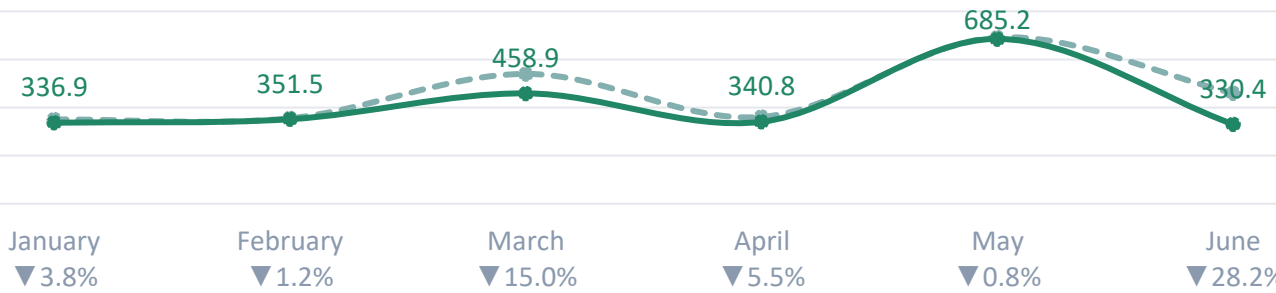
Average Daily Rate (ﷲ)

Overall

Peak: 685.2 ﷲ
May

Min: 330.4 ﷲ
June

Average: 413 ﷲ

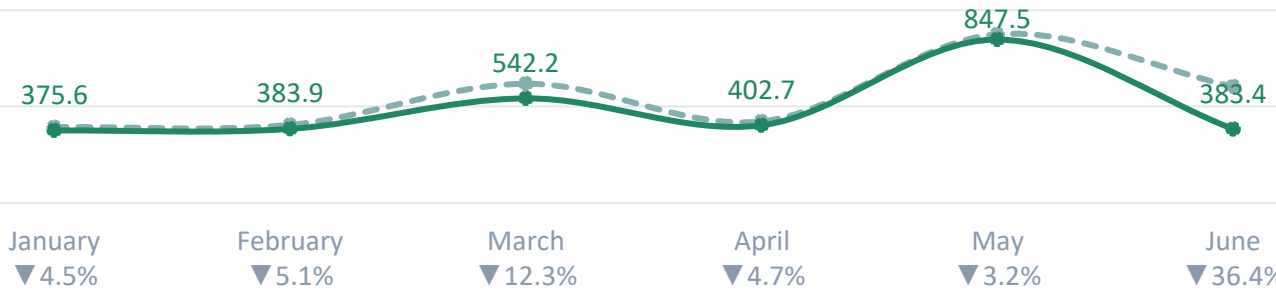


Hotels

Peak: 847.5 ﷲ
May

Min: 375.6 ﷲ
January

Average: 480 ﷲ

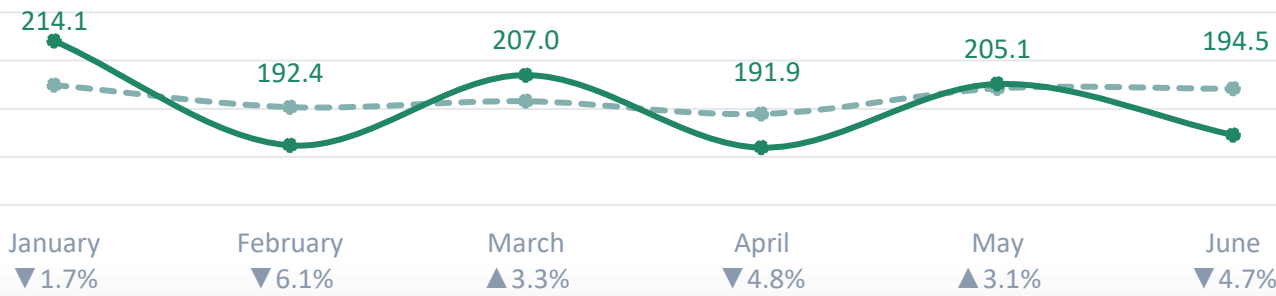


Apartments & Others

Peak: ﷲ214.1
January

Min: 191.9 ﷲ
April

Average: 202 ﷲ



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

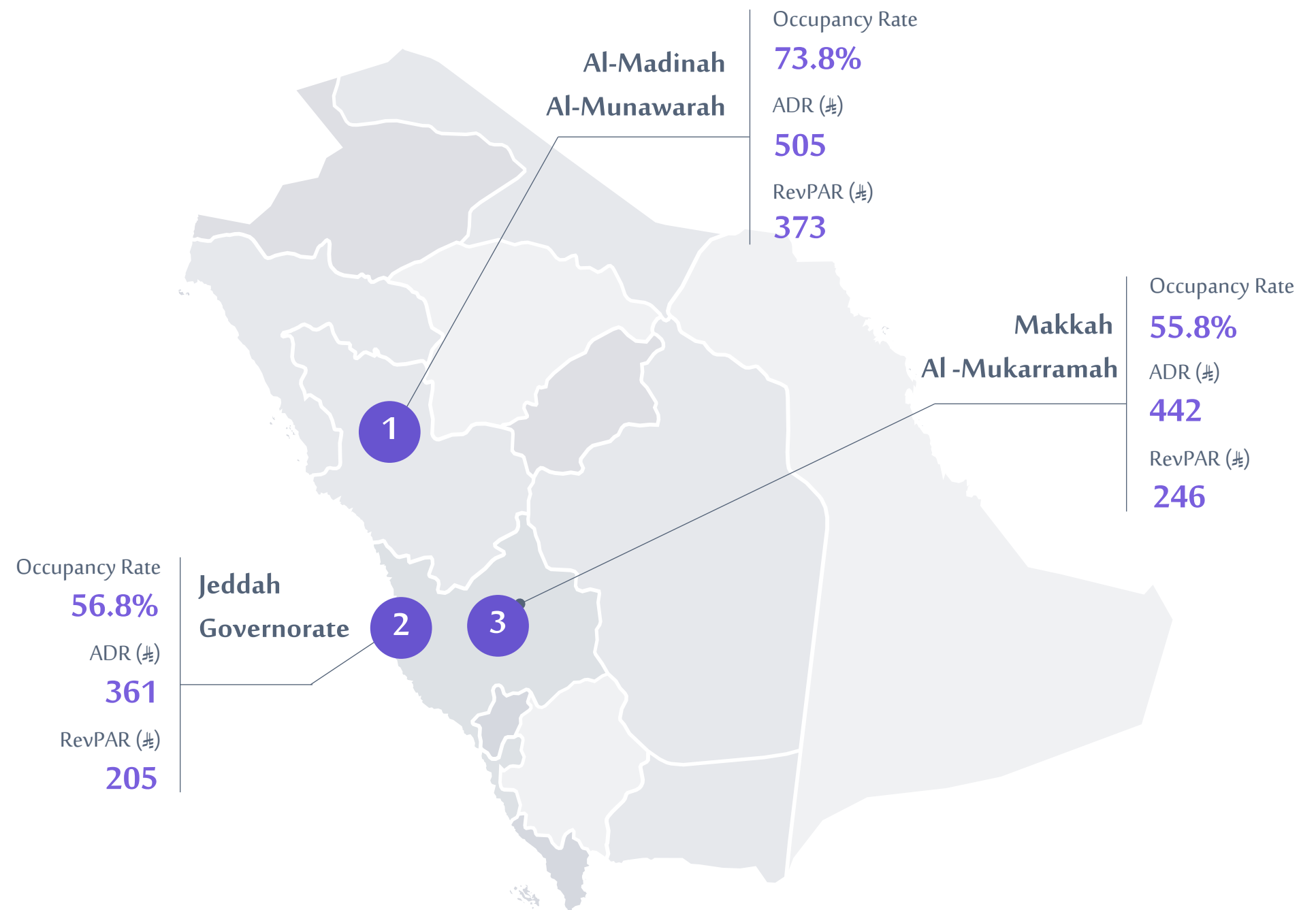
Al-Kur Tourist Village | Taif Governorate

First Half Performance – Overview

In H1 2026, the overall occupancy rate for tourism hospitality facilities in the Kingdom of Saudi Arabia, reached (54.8%) 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 (73.8%), followed by Jeddah governorate at (56.8%). January 2026 emerged as the peak month for overall occupancy in KSA during H1 2026, reaching (61.8%).

Regarding revenue, the Average Daily Rate (ADR) for all tourism hospitality facilities in the Kingdom of Saudi Arabia averaged (413 ﷲ). Hotels recorded a higher ADR of(480ﷲ) ,while apartments & others averaged(202 ﷲ) . Consequently, the Revenue Per Available Room (RevPAR) stood at (SAR 227) in H1 2026.

Top Three Destinations by Performance



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



Occupancy Rate (%)

	H1 2025	H1 2026	Growth Rate ⁽¹⁾
Overall KSA	56.6%	54.8%	▼ 1.7pp
Riyadh (2)	58.3%	51.9%	▼ 6.4pp
Makkah Al Mukarramah	56.4%	55.8%	▼ 0.6pp
Jeddah Governorate	59.7%	56.8%	▼ 2.8pp
Taif Governorate	35.1%	34.7%	▼ 0.4pp
Al-Madinah Al-Munawarah	74.7%	73.8%	▼ 0.9pp
Buraydah & Unayzah	47.8%	50.6%	▲ 2.8pp
Al Ahsa Governorate	46.3%	44.6%	▼ 1.7pp
Dammam Metropolitan (3)	55.3%	51.5%	▼ 3.8pp
Abha & Khamis Mushait	40.5%	39.1%	▼ 1.4pp
Tabuk	38.9%	33.4%	▼ 5.5pp
Hail	43.6%	43.4%	▼ 0.1pp
Arar	45.8%	46.6%	▲ 0.9pp
Jazan	44.2%	43.1%	▼ 1.1pp
Najran	54.1%	52.9%	▼ 1.2pp
Al-Baha	32.0%	32.3%	▲ 0.3pp
Sakaka	43.5%	40.7%	▼ 2.8pp
Other (4)	41.5%	40.1%	▼ 1.4pp



Average Daily Rate (ﷲ)

	H1 2025	H1 2026	Growth Rate
Overall KSA	458	413	▼ 9.8%
Riyadh (2)	497	426	▼ 14.3%
Makkah Al Mukarramah	525	442	▼ 15.9%
Jeddah Governorate	402	361	▼ 10.1%
Taif Governorate	230	230	▼ 0.2%
Al-Madinah Al-Munawarah	538	505	▼ 6.0%
Buraydah & Unayzah	231	241	▲ 4.6%
Al Ahsa Governorate	253	269	▲ 6.6%
Dammam Metropolitan (3)	354	348	▼ 1.7%
Abha & Khamis Mushait	189	184	▼ 2.7%
Tabuk	193	200	▲ 3.3%
Hail	257	240	▼ 6.8%
Arar	214	215	▲ 0.6%
Jazan	270	267	▼ 1.1%
Najran	160	190	▲ 19.0%
Al-Baha	179	173	▼ 3.1%
Sakaka	179	174	▼ 2.6%
Other (4)	291	323	▲ 10.8%



Revenue Per Available Room (ﷲ)

	H1 2025	H1 2026	Growth Rate
Overall KSA	259	227	▼ 12.5%
Riyadh (2)	290	221	▼ 23.7%
Makkah Al Mukarramah	296	246	▼ 16.8%
Jeddah Governorate	240	205	▼ 14.3%
Taif Governorate	81	80	▼ 1.5%
Al-Madinah Al-Munawarah	402	373	▼ 7.2%
Buraydah & Unayzah	110	122	▲ 10.7%
Al Ahsa Governorate	117	120	▲ 2.7%
Dammam Metropolitan (3)	196	179	▼ 8.4%
Abha & Khamis Mushait	77	72	▼ 6.0%
Tabuk	75	67	▼ 11.4%
Hail	112	104	▼ 7.1%
Arar	98	100	▲ 2.6%
Jazan	119	115	▼ 3.5%
Najran	86	101	▲ 16.5%
Al-Baha	57	56	▼ 2.2%
Sakaka	78	71	▼ 8.9%
Other (4)	121	129	▲ 7.0%

ADR and RevPAR Excluding VAT and Municipal Services Fees

- (1) PP: Percentage Point
 (2) Riyadh includes Diriyah Governorate
 (3) Dammam Metropolitan Area Includes Dammam, Khobar, and Dhahran
 (4) Other Includes Cities and Governorates not Covered in This Report

Hotels Performance – First Half



Occupancy Rate (%)

	H1 2025	H1 2026	Growth Rate ⁽¹⁾
Overall KSA	58.5%	56.7%	▼ 1.9pp
Riyadh (2)	56.1%	46.8%	▼ 9.3pp
Makkah Al Mukarramah	56.5%	55.9%	▼ 0.5pp
Jeddah Governorate	62.4%	59.4%	▼ 3.0pp
Taif Governorate	33.5%	31.3%	▼ 2.2pp
Al-Madinah Al-Munawarah	76.3%	75.7%	▼ 0.6pp
Buraydah & Unayzah	48.1%	48.0%	▼ 0.1pp
Al Ahsa Governorate	49.0%	47.5%	▼ 1.5pp
Dammam Metropolitan (3)	55.8%	50.4%	▼ 5.4pp
Abha & Khamis Mushait	36.2%	34.0%	▼ 2.2pp
Tabuk	32.2%	27.0%	▼ 5.2pp
Hail	36.3%	34.6%	▼ 1.6pp
Arar	47.2%	47.2%	▼ 0.0pp
Jazan	41.1%	41.4%	▲ 0.2pp
Najran	44.3%	42.5%	▼ 1.8pp
Al-Baha	21.2%	29.7%	▲ 8.5pp
Sakaka	39.1%	37.5%	▼ 1.6pp
Other (4)	41.7%	36.0%	▼ 5.6pp



Average Daily Rate (ﷵ)

	H1 2025	H1 2026	Growth Rate
	545	480	▼ 11.9%
	793	665	▼ 16.1%
	527	443	▼ 15.9%
	553	486	▼ 12.3%
	441	402	▼ 8.9%
	551	524	▼ 4.9%
	435	426	▼ 2.1%
	604	569	▼ 5.8%
	447	456	▲ 2.1%
	332	300	▼ 9.6%
	268	271	▲ 1.1%
	460	395	▼ 14.1%
	212	245	▲ 15.5%
	358	335	▼ 6.4%
	281	331	▲ 18.0%
	311	338	▲ 8.6%
	289	268	▼ 7.2%
	486	577	▲ 18.8%



Revenue Per Available Room (ﷵ)

	H1 2025	H1 2026	Growth Rate
	319	272	▼ 14.7%
	445	311	▼ 30.0%
	298	248	▼ 16.7%
	345	288	▼ 16.5%
	148	126	▼ 14.8%
	420	397	▼ 5.6%
	209	204	▼ 2.4%
	296	270	▼ 8.7%
	249	230	▼ 7.8%
	120	102	▼ 15.0%
	86	73	▼ 15.3%
	167	137	▼ 18.0%
	100	115	▲ 15.4%
	147	139	▼ 5.9%
	124	141	▲ 13.2%
	66	100	▲ 52.2%
	113	101	▼ 10.9%
	202	208	▲ 2.8%

Apartment & Others Performance – First Half



Occupancy Rate (%)

	H1 2025	H1 2026	Growth Rate ⁽¹⁾
Overall KSA	50.4%	49.1%	▼ 1.3pp
Riyadh (2)	60.7%	56.8%	▼ 3.9pp
Makkah Al Mukarramah	37.6%	43.1%	▲ 5.5pp
Jeddah Governorate	55.9%	53.2%	▼ 2.8pp
Taif Governorate	35.7%	36.2%	▲ 0.4pp
Al-Madinah Al-Munawarah	51.1%	51.2%	▲ 0.1pp
Buraydah & Unayzah	47.6%	52.1%	▲ 4.5pp
Al Ahsa Governorate	45.3%	43.5%	▼ 1.8pp
Dammam Metropolitan (3)	54.6%	52.8%	▼ 1.8pp
Abha & Khamis Mushait	42.5%	41.7%	▼ 0.7pp
Tabuk	46.2%	40.7%	▼ 5.5pp
Hail	46.8%	47.4%	▲ 0.6pp
Arar	43.7%	45.5%	▲ 1.8pp
Jazan	49.0%	46.6%	▼ 2.4pp
Najran	61.5%	59.9%	▼ 1.6pp
Al-Baha	34.3%	33.2%	▼ 1.0pp
Sakaka	46.1%	42.1%	▼ 4.0pp
Other (4)	41.4%	43.2%	▲ 1.7pp



Average Daily Rate (ﷲ)

H1 2025	H1 2026	Growth Rate
205	202	▼ 1.6%
245	242	▼ 1.0%
147	223	▲ 51.0%
212	205	▼ 3.3%
166	166	▼ 0.1%
291	245	▼ 15.7%
153	158	▲ 3.1%
182	183	▲ 0.2%
240	221	▼ 8.1%
137	131	▼ 4.6%
132	136	▲ 3.2%
197	190	▼ 3.8%
217	170	▼ 21.7%
153	160	▲ 4.5%
92	94	▲ 1.4%
157	143	▼ 8.5%
125	135	▲ 8.0%
169	173	▲ 2.4%



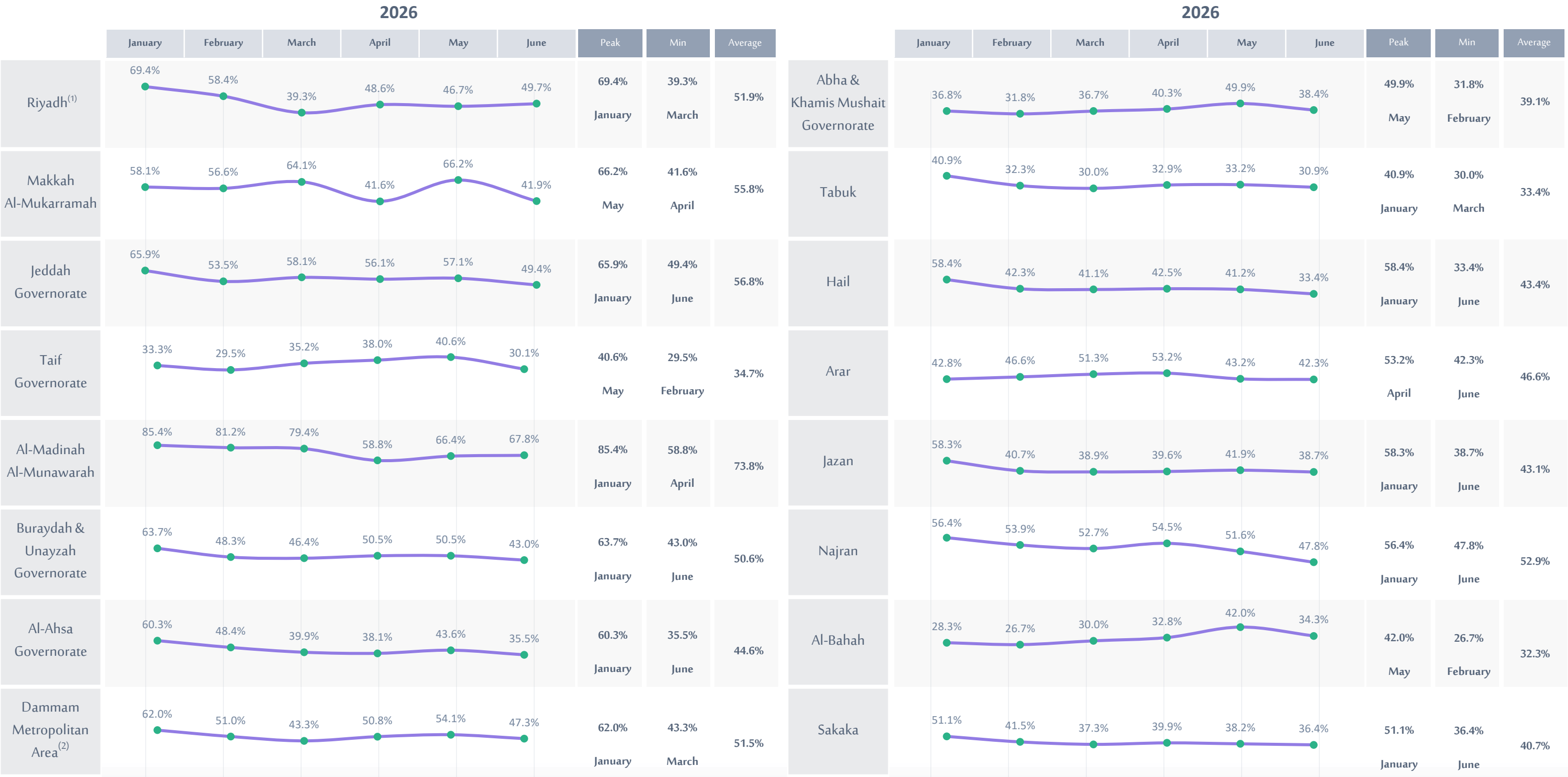
Revenue Per Available Room (ﷲ)

H1 2025	H1 2026	Growth Rate
103	99	▼ 4.1%
149	138	▼ 7.3%
55	96	▲ 72.9%
119	109	▼ 8.1%
59	60	▲ 1.1%
149	126	▼ 15.5%
73	82	▲ 12.9%
83	79	▼ 3.7%
131	117	▼ 11.1%
58	54	▼ 6.3%
61	55	▼ 9.1%
92	90	▼ 2.5%
95	77	▼ 18.4%
75	75	▼ 0.7%
57	56	▼ 1.3%
54	48	▼ 11.2%
58	57	▼ 1.3%
70	75	▲ 6.7%

Overall Performance (Hotels, Apartments & Others) – Monthly



Occupancy Rate (%)



(1) Riyadh includes Diriyah Governorate
(2) Dammam Metropolitan Area Includes Dammam, Khobar, and Dhahran
ADR and RevPAR excluding VAT and Municipal Services Fees

Overall Performance (Hotels, Apartments & Others) – Monthly



ADR



Hotels Performance – Monthly

2026



Occupancy Rate (%)

2026

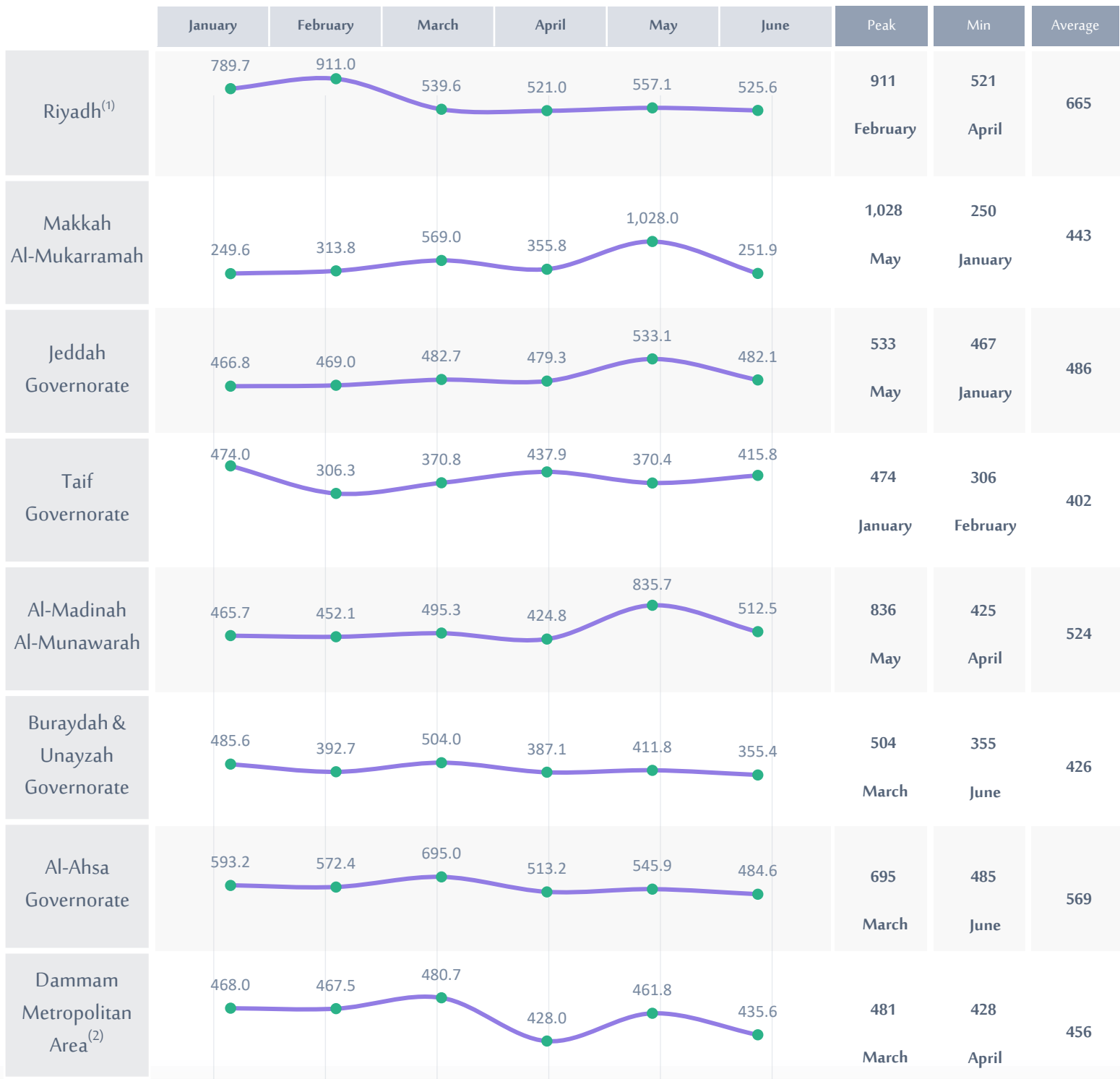




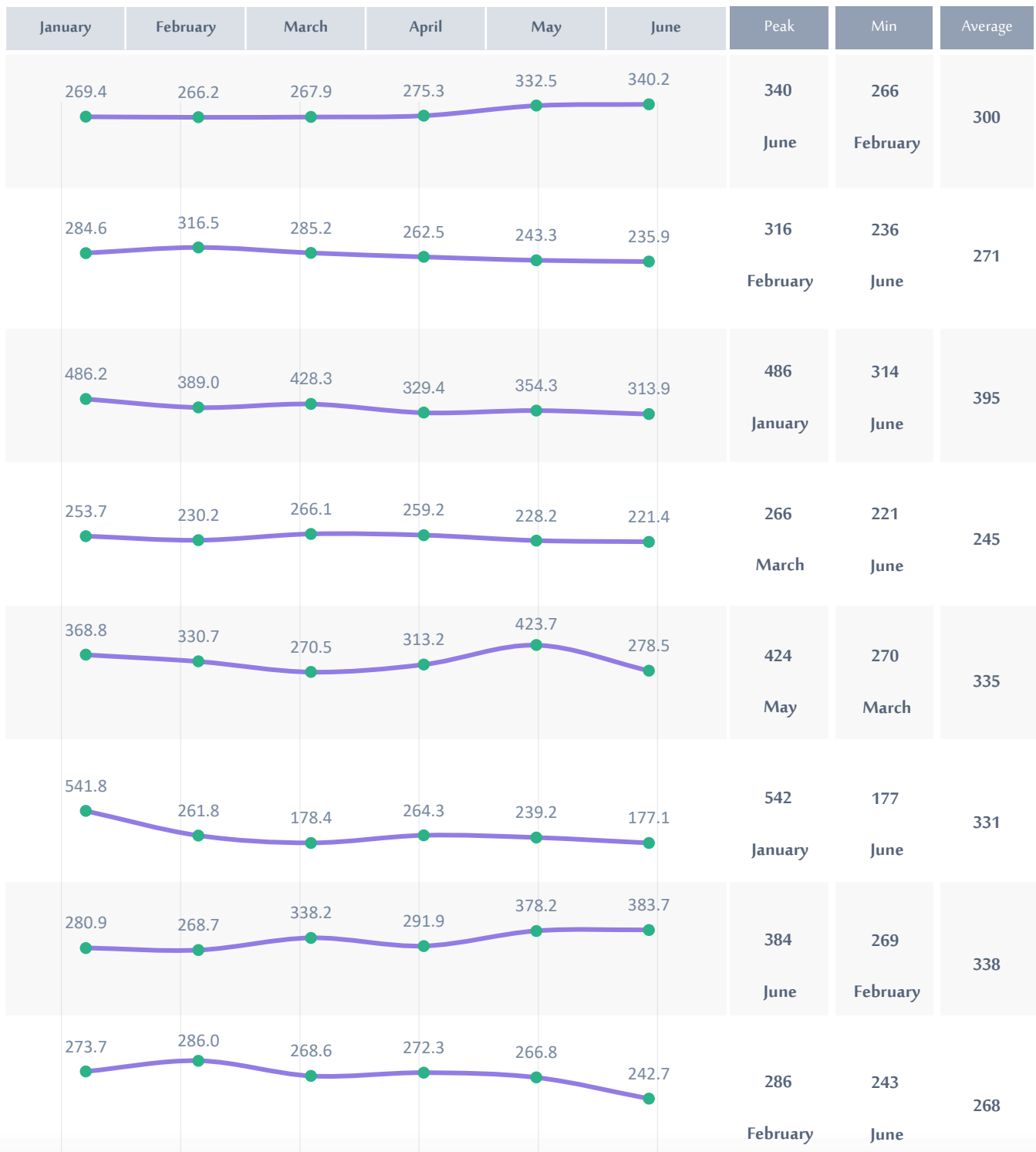
ADR

Hotels Performance – Monthly

2026



2026



Apartments & Others Performance – Monthly



Occupancy Rate (%)



Apartments & Others Performance – Monthly



ADR

2026



2026



LICENSED TOURISM HOSPITALITY FACILITIES

First Half
2026

1

Newly Licensed Facilities

2

Room Keys in Newly Licensed Facilities

As of the First Half
2026

1

Licensed Facilities

2

Room Keys in Licensed Facilities

Airstream Recreational Vehicle | AIUla

Newly Licensed Facilities during the First Half of 2026

Makkah Al-Mukaramah city topped the list for newly licensed tourism hospitality facilities across Saudi Arabia in the first half of 2026, accounting for **(24%)** of all licenses issued. Al-Madinah Al-Munawarah followed, representing **(18%)** of these new facilities.



Hotels

Total Newly Licensed Facilities

in KSA

262*

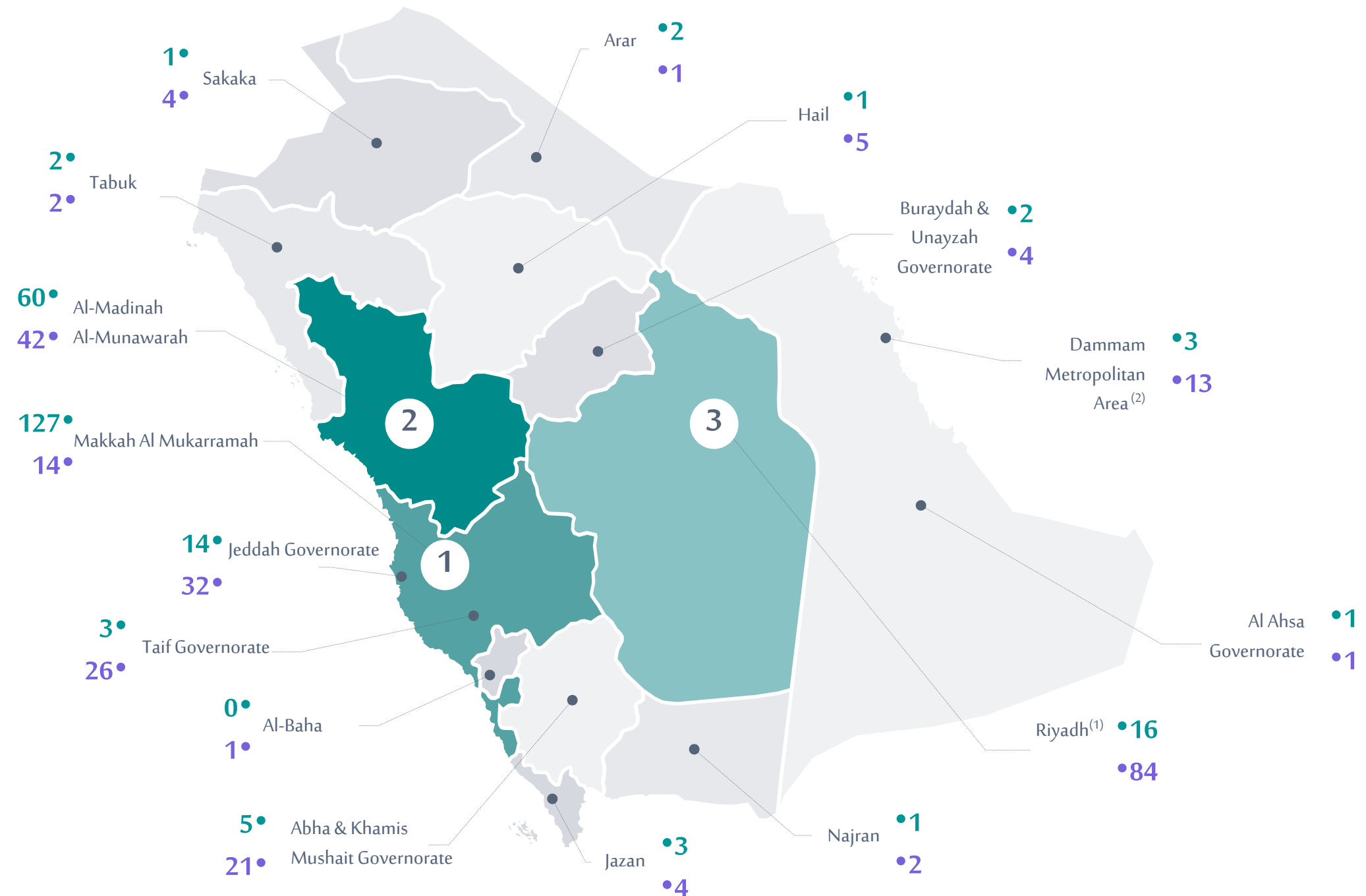


Apartments & Others

Total Newly Licensed Facilities

in KSA

318*



Newly Licensed Facilities: Newly Licensed Tourism Hospitality Facilities in H1 2026.

(1) Riyadh Includes Diriyah Governorate

(2) Dammam Metropolitan Area Includes Dammam, Khobar, and Dhahran

(*) Numbers Reflect only the Number of newly Licensed Facilities in KSA in H1 2026 only based on City/ Governorate levels

Room Keys in Newly Licensed Facilities during the First Half of 2026

In H1 2026, Makkah Al-Mukaramah city accounted for a substantial (48%) of all room keys in newly licensed tourism hospitality facilities across the kingdom. Al-Madinah Al-Munawarah followed with (17%); this includes Hotels, Apartments & Others



Hotels

Total Room Keys in Newly Licensed Facilities in KSA

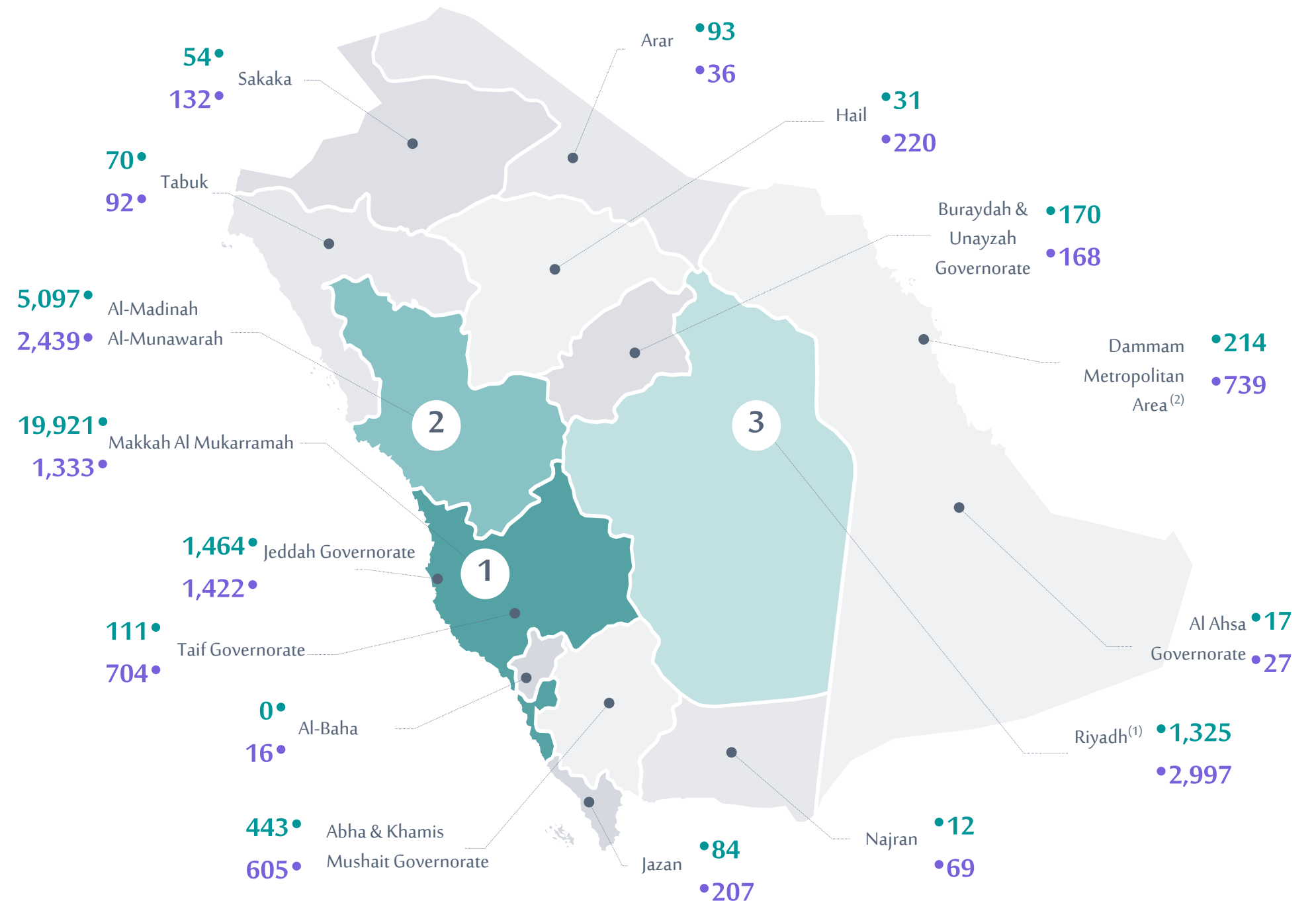
29,963*



Apartments & Others

Total Room Keys in Newly Licensed Facilities in KSA

14,132*



Newly Licensed Facilities: Newly Licensed Tourism Hospitality Facilities in H1 2026.

(1) Riyadh Includes Diriyah Governorate

(2) Dammam Metropolitan Area Includes Dammam, Khobar, and Dhahran

(*) Numbers Reflect only the Number of newly Licensed Facilities in KSA in H1 2026 only based on City/ Governorate levels

Total Licensed Facilities

As of H1 2026, Saudi Arabia had licensed a total of **(6,278)** tourism hospitality facilities, with Hotels accounting for **(48%)** and Apartments & Others making up **(52%)**.

Among the Kingdom's major cities and governorates, Makkah Al-Mukarramah city recorded the highest number of licensed facilities, totaling **(1,453)** Notably, **(97%)** of these were Hotels. Riyadh⁽¹⁾ city followed in second place with **(1,121)** licensed facilities, where **(79%)** were Apartments & Others



Hotels

Total Licensed Facilities

in KSA

3,020*

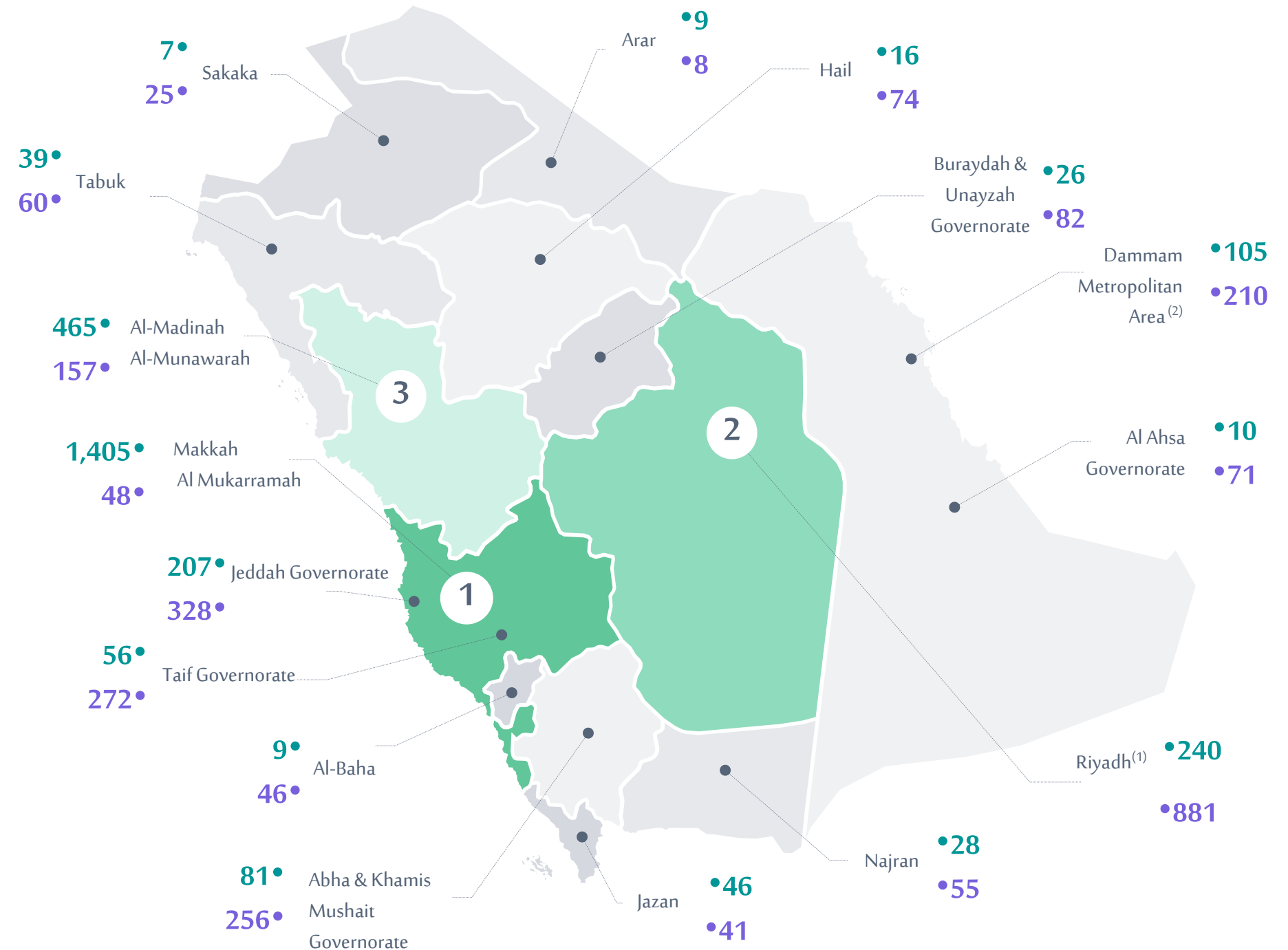


Apartments & Others

Total Licensed Facilities

in KSA

3,258*



Licensed Facilities: Tourism hospitality Facilities Carrying Active Licenses At The End of H1 2026 (As of June 30th, 2026)

(1) Riyadh Includes Diriyah Governorate

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

(*) Numbers Reflect The Total Number of Licensed Facilities in KSA based on City/ Governorate levels

Total Room Keys in Licensed Facilities

As of H1 2026, a total of **(622,898)** room keys were recorded in licensed tourism hospitality facilities across Saudi Arabia, with Hotels comprising **(82%)** and Apartments & Others **(18%)**

Makkah Al-Mukarramah city notably contributed the highest number of room keys at **(344,012)**, with **(99%)** exclusively in Hotels. Al-Madinah Al-Munawarah city ranked second, recording **(79,594)** room keys, **(90%)** of which were also Hotel-based



Hotels

Total Room Keys in Licensed Facilities in KSA

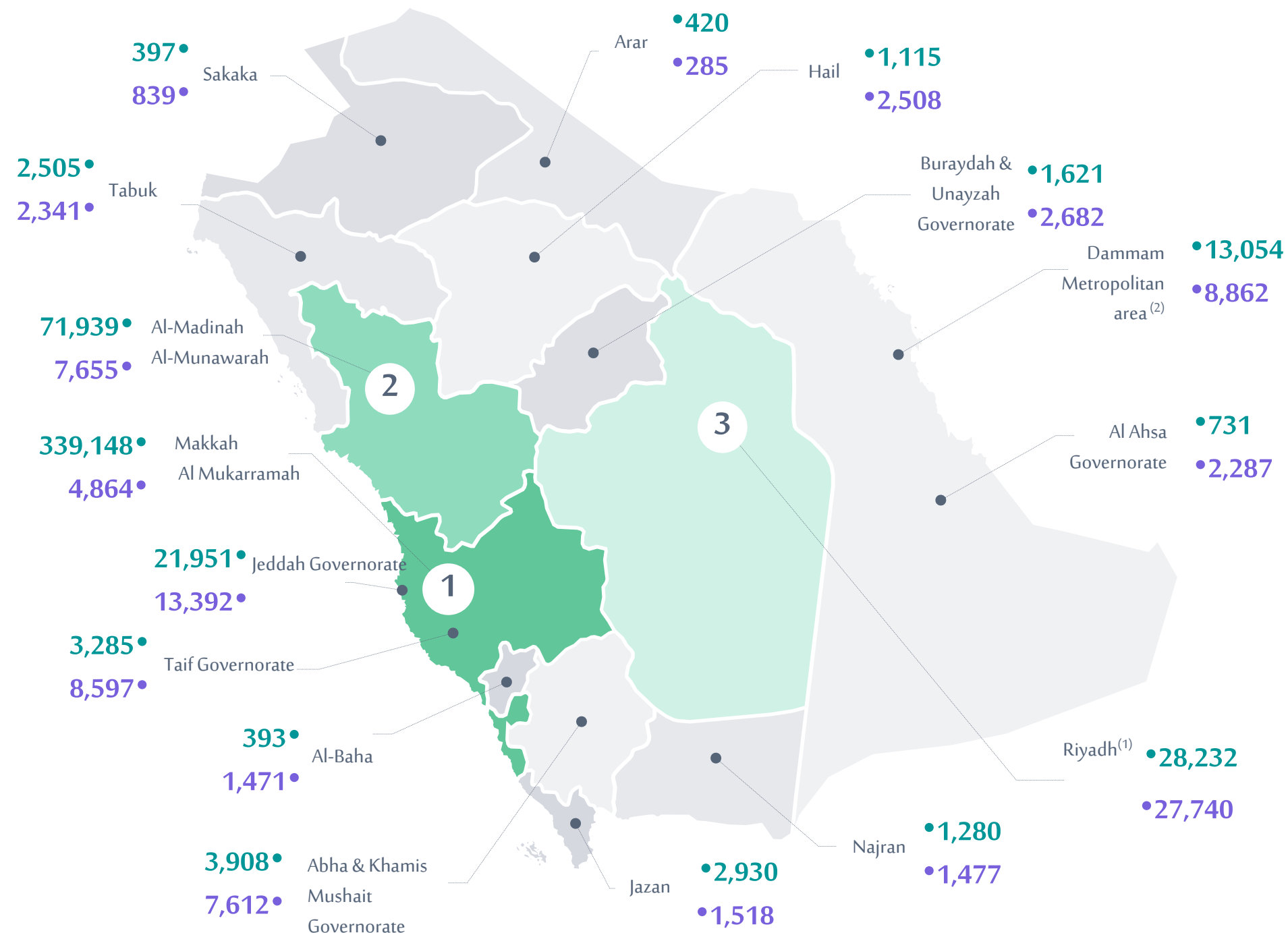
509,394*



Apartments & Others

Total Room Keys in Licensed Facilities in KSA

113,504*



Licensed Facilities: Tourism hospitality Facilities Carrying Active Licenses At The End of H1 2026 (As of June 30th, 2026)

(1) Riyadh Includes Diriyah Governorate

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

(*) Numbers Reflect The Total Number of Room Keys in Licensed Facilities in KSA based on City/ Governorate levels

Appendix

Newly Licensed Facilities & Room Keys - First Half of 2026

	 Hotels		 Apartments & Others	
Main Provinces	Newly Licensed Facilities	Room Keys in Newly Licensed Facilities	Newly Licensed Facilities	Room Keys in Newly Licensed Facilities
Riyadh	18	1,491	100	3,444
Makkah	147	21,640	77	3,874
Al-Madinah	64	5,223	43	2,472
Al-Qassim	2	170	4	168
Eastern Province	8	384	28	1,255
Aseer	7	503	25	727
Tabuk	3	82	13	1,203
Hail	1	31	6	261
Northern Border	2	93	2	54
Jazan	6	143	8	293
Najran	1	12	3	117
Al-Baha	1	100	2	54
Al-Jouf	2	91	7	210
Overall KSA	262	29,963	318	14,132

Total Licensed Facilities & Room Keys - First Half of 2026

	 Hotels		 Apartments & Others	
Main Provinces	Overall Licensed Facilities	Overall Room Keys in Licensed Facilities	Overall Licensed Facilities	Overall Room Keys in Licensed Facilities
Riyadh	261	29,134	1,020	31,766
Makkah	1,684	365,584	681	27,970
Al-Madinah	496	73,798	199	9,060
Al-Qassim	32	2,028	106	3,397
Eastern Province	159	17,317	390	15,264
Aseer	112	5,134	338	9,897
Tabuk	90	6,823	92	3,183
Hail	17	1,157	86	2,748
Northern Border	18	1,058	28	780
Jazan	88	4,425	116	3,436
Najran	36	1,662	71	2,016
Al-Baha	15	644	74	2,298
Al-Jouf	12	630	57	1,689
Overall KSA	3,020	509,394	3,258	113,504

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



For Further Information:

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