

وزارة السياحة  
Ministry of Tourism



# STABILITY AMID REGIONAL VOLATILITY

Saudi Tourism Sector Performance  
Q1 2026

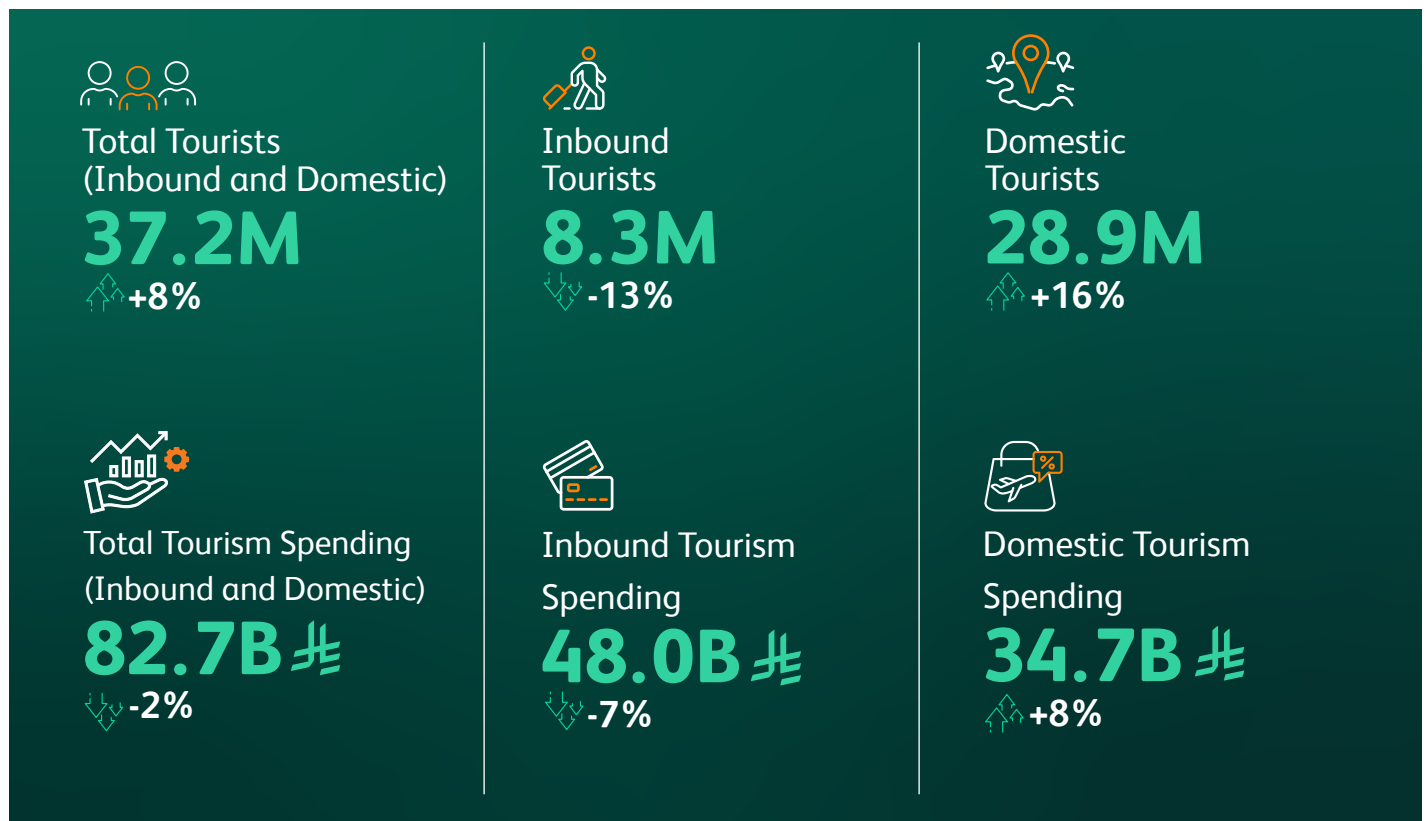
This special report provides an overview of Saudi tourism sector performance based on preliminary data for the first quarter of 2026, examining key indicators across inbound and domestic tourists, tourism spending, accommodation performance against the backdrop of the ongoing regional conflict and its wider effects on the regional operating environment. It includes a closer assessment of sector performance to identify any visible effects on tourism and demand patterns, and to present a clear picture of the market's underlying resilience, continuity and structural strengths during a period of heightened regional disruption.



# Saudi Tourism Sector Preliminary Overview Q1 2026

Amid a challenging regional environment, Saudi Arabia's tourism sector closed the first quarter of 2026 with a strong and resilient performance, with total tourists (inbound and domestic) growing by 8% reaching 37.2 million tourists with total tourism spending (inbound and domestic) estimated at 82.7 billion  $\text{SAR}$ .

Ramadan and Eid were key to the strong quarter with Red Sea resorts seeing stronger holiday demand and expanded flight connectivity, reinforcing the region's role as a flagship driver of Saudi Arabia's premium leisure tourism. Achieved amid regional disruption linked to the regional conflict, this performance continues to underscore the resilience and depth of the Saudi market.



\*Q1 2026 vs Q1 2025

Based on Domestic tourism preliminary figures, the number of domestic tourists in Q1 2026 reached around 28.9 million tourists, reflecting a 16% increase in the number of tourists and 34.7 billion  $\text{SAR}$  in tourism spending an 8% rise compared to Q1 2025. Inbound tourism recorded 8.3 million tourists, representing a 13% decline in tourist numbers and 48.0 billion  $\text{SAR}$  in tourism spending, down 7% over the same period.



Taken together, these indicators position the Red Sea as one of the quarter's clearest tourism success stories, demonstrating the Kingdom's ability to convert seasonal demand into strong premium leisure performance even amid a more challenging regional environment.



# Inbound Tourism

Based on preliminary data for Q1 2026, inbound tourism recorded 8.3 million tourists, reflecting a 13% decline in tourist numbers and 48.0 billion ﷲ in tourism spending, a decrease of 7% compared to Q1 2025.

## Inbound Tourism Q1 2026



Tourists

**8.3** Million



Tourism Spending

**48.0** Billion ﷲ



Tourists Change

**-13%**

compared to Q1 2025



Tourism Spending Change

**-7%**

compared to Q1 2025

# Domestic Tourism

Saudi Arabia's strong domestic tourism market continued to serve as an important structural buffer according to preliminary Q1 2026 estimates, sustaining sector momentum through deep and reliable local demand.

Domestic tourism rose from 24.9 million tourists to 28.9 million tourists, an increase of 16% in Q1 2026 compared to the same period last year. Domestic tourism spending also increased from 32.3 billion ﷲ to 34.7 billion ﷲ, reflecting 8% growth over the same period. Together, these patterns highlight a key strength of the Saudi market that reinforces stability and resilience especially during disruptions. Together, these patterns highlight a key strength of the Saudi market which reinforces stability and resilience especially during disruptions.

## Domestic Tourism Q1 2026



Tourists

**28.9**

Million



Tourists Change

**+16%**

compared to Q1 2025



Tourism Spending

**34.7**

Billion ﷲ



Tourism Spending Change

**+8%**

compared to Q1 2025

# Accommodation Sector Performance

According to preliminary Q1 2026 data, tourism accommodation facilities posted a total occupancy rate around 59%, Al-Madina Al-Munawarah recorded the highest occupancy in the Kingdom at 82%, followed by Makkah Al-Mukarramah at 60% and Jeddah at 59%.

## Destinations with the highest occupancy Q1 2026

Al-Madina Al-Munawarah **82%**



Makkah Al-Mukarramah **60%**



Jeddah **59%**



Riyadh<sup>1</sup> **56%**



## Destinations with the largest occupancy improvements Q1 2026

Buraydah & Unayzah

**+4.4p.p<sup>2</sup>**

Hail

**+2.7p.p**

Arar

**+2.0p.p**

Al-Bahah

**+1.4p.p**

Preliminary Data

1-Riyadh includes Diriyah Governorate

2-p.p: Percentage Point

# Ramadan and Eid Season

Ramadan and Eid were key to the strong quarter with the Eastern Region, the Red Sea and AlUla corridor seeing demand and expanded flight connectivity, reinforcing the region's role as a flagship driver of Saudi Arabia's premium leisure tourism.

Makkah and Madinah were flagship performers. In the last ten days of Ramadan, hotel occupancy in Makkah Al-Mukarramah reached high numbers, with several luxury properties exceeding 97% and up to 100% occupancy during Ramadan peak days. Across the month of March, Al-Madina Al-Munawarah posted the highest occupancy in the Kingdom followed by Makkah Al-Mukarramah.

The season also proved to be a strong domestic leisure window, particularly across the Red Sea and Jeddah corridor. During the last ten days of Ramadan, occupancy climbed to 82% in featured Red Sea ultra luxury resorts and 85% in featured Jeddah resorts. AlUla resorts also posted strong results, with occupancy in featured resorts reaching 77%.

Overall, despite softer inbound volumes due to the regional conflict, total visitor numbers in Saudi Arabia continued to expand. The Ramadan and Eid school vacation saw strong growth in domestic tourism, with domestic tourism reaching around 10.0 million tourists, an increase of 14%, and domestic tourism spending was estimated at 10.2 billion  $\text{ﷲ}$ , growing by 5% compared to the same period last year.



# Domestic tourism showed strong performance during Ramadan and Eid school holidays

Period: 16 Ramadan to 9 Shawwal compared to the same Hijri date of last year

10.0 Million tourists (overnight visitor)

**+14%**

Domestic Tourists YoY

Makkah Al-Mukarramah

**3.0M Visitors**

**+16%**

increase in domestic visitors vs same period last year

Al-Madina Al-Munawarah

**0.8M Visitors**

**+20%**

increase in domestic visitors vs same period last year

Jeddah

**1.1M Visitors**

**+17%**

increase in domestic visitors vs same period last year

Riyadh

**1.5M Visitors**

**+10%**

increase in domestic visitors vs same period last year

Eastern Province

**1.0M Visitors**

**+13%**

increase in domestic visitors vs same period last year

Rest of the Kingdom

**2.7M Visitors**

**+13%**

increase in domestic visitors vs same period last year

## Occupancy

Rates reflect occupancy (3 - 8 Shawwal) of 11 high-end properties promoted during the Eid period, based on available rooms booked during the period.

Data were sourced directly from the promoted properties.

Red Sea  
Resorts

**82%**

Jeddah  
Resorts

**85%**

AlUla  
Resorts

**77%**



## Q1 2026 in Perspective

Overall, preliminary Q1 2026 indicate that Saudi Arabia's tourism sector continues to maintain the levels achieved in 2025. The number of total domestic and inbound tourists reached around 37.2 million, reflecting growth of around 8%. Total tourism spending by domestic and inbound tourism amounted to approximately 82.7 billion  $\text{ﷲ}$ , a decline of about 2%, supported by the rise in domestic tourism. This continued strength of domestic demand provided an important source of stability. Taken together, the quarter presents a picture of a sector supported by solid underlying fundamentals, with resilience visible across key indicators and a generally steady performance during a complex regional period.



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Special Report: Saudi Tourism Sector Performance in Q1 2026

Sources: Ministry of Tourism, Saudi Tourism Authority

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