Saudi
Welcome to Arabia

وزارة السياحة
Ministry of Tourism

Saudi Tourism Analytics Dashboard

Comprehensive Performance Analysis & Investment Opportunities

Vision 2030 Progress | 2019 - 2024

Prepared by: Ibrahim Bolad

Last updated: December 2025

Ibrahim Bolad | LINKEDIN

bolad68@gmail.com

VISION رؤية 2030
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA

Content

Start

Saudi Tourism Executive Overview | Vision 2030

Ibrahim

Total_Visitors_2024
116M
vs previous year ▲ +6.0%

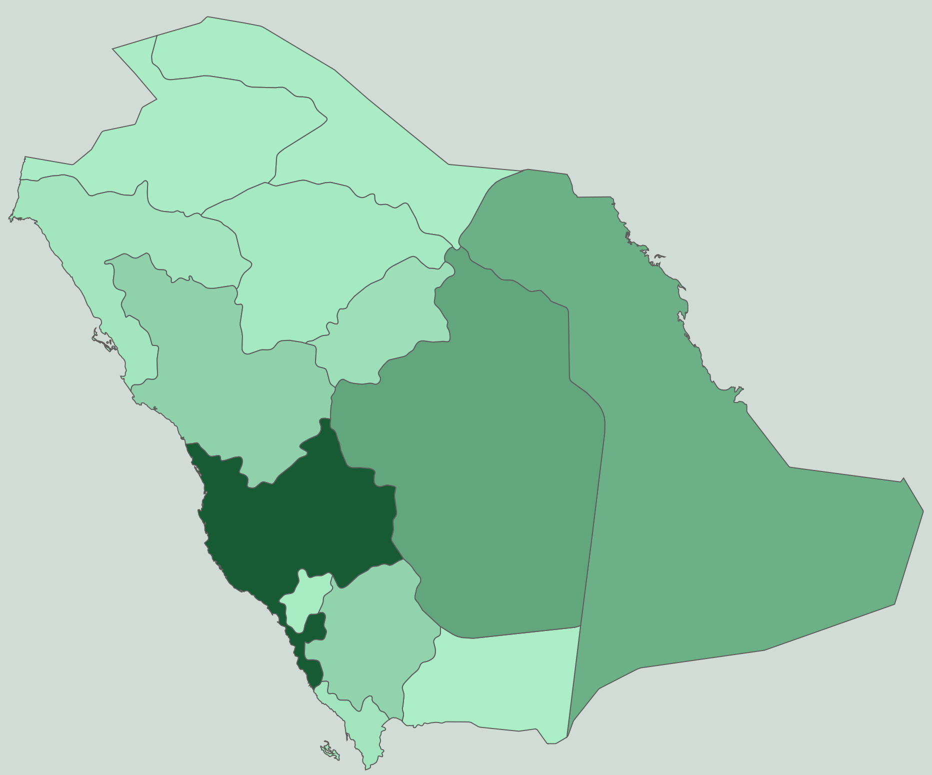
Total_Spending_2024
284bn ⃁
vs previous year ▲ +11.0%

Total Visitors: Progress to Target

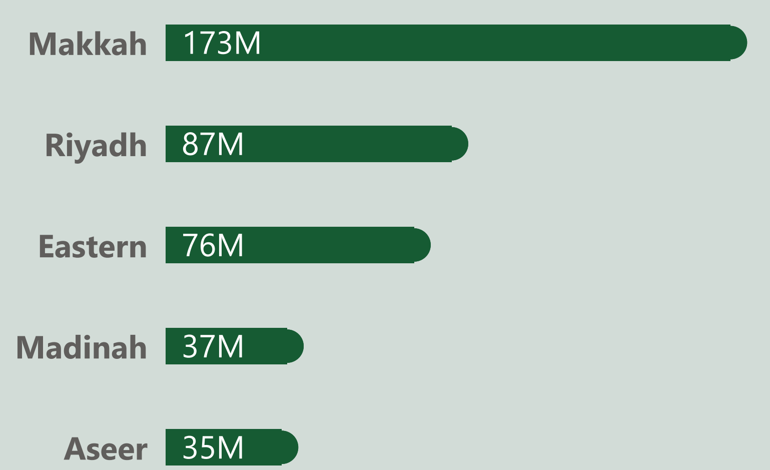
YoY_Growth_Latest
6%
vs_CAGR ▼ -6.2%

Spending_Per_Visitor
2.19K ⃁
vs previous year ▲ +4.8%

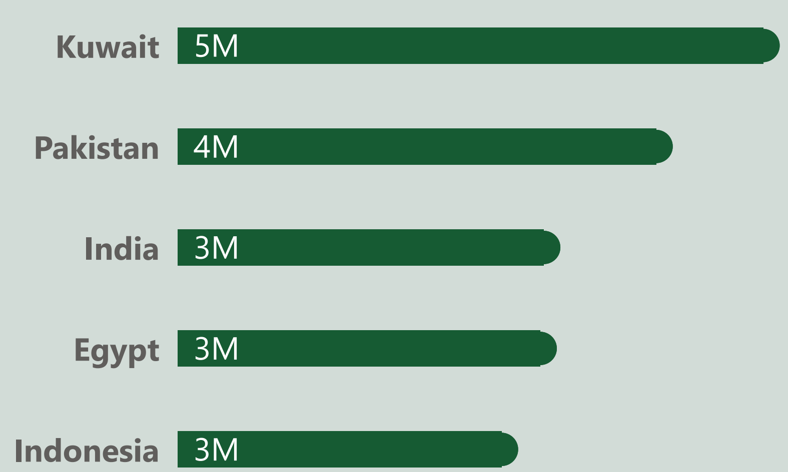
Total_Visitors and First Region by Region

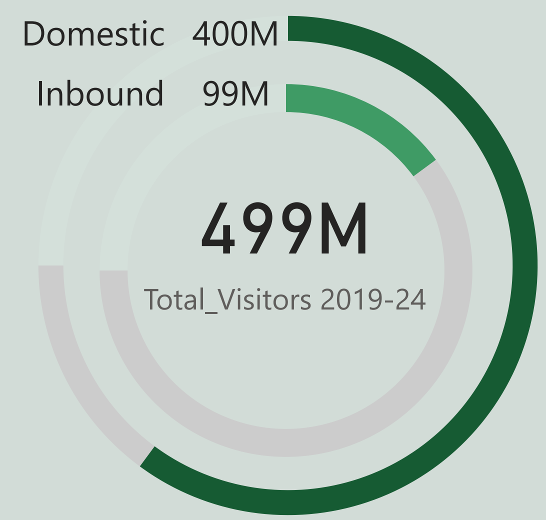


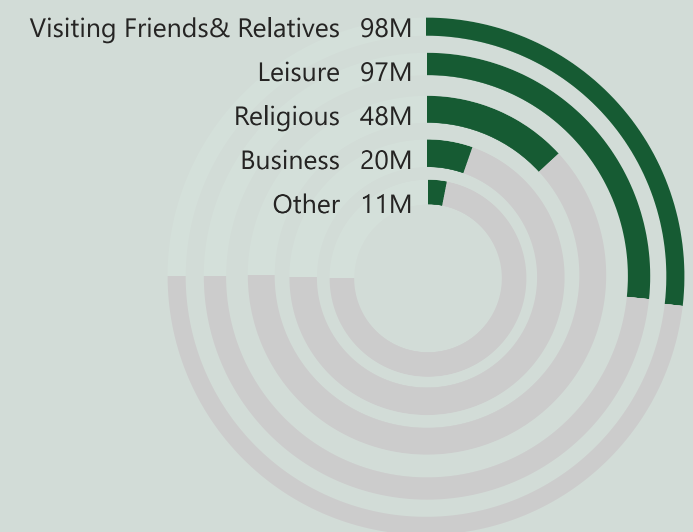
Total Visitors by region



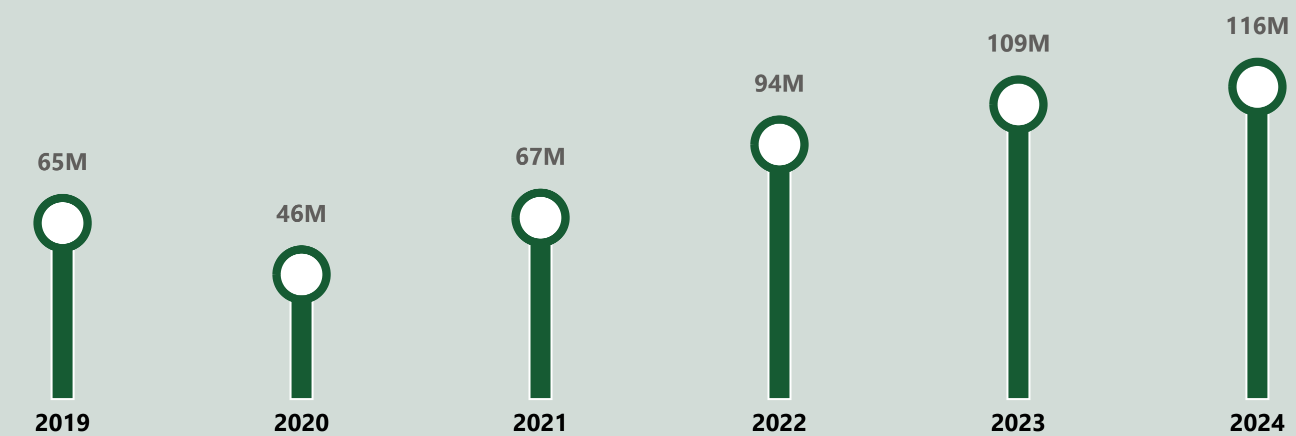
Total Visitors by region







Total Visitors by Year



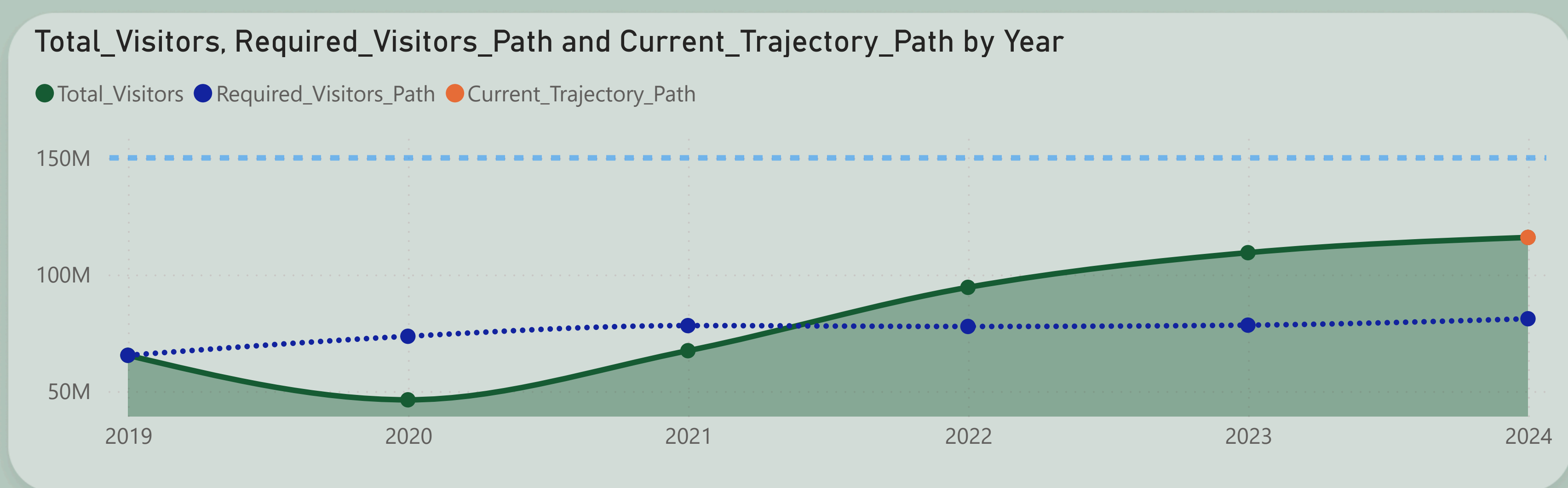
Vision 2030 on track: 116M visitors (77% progress) with CAGR of 12.1%—triple the required growth rate

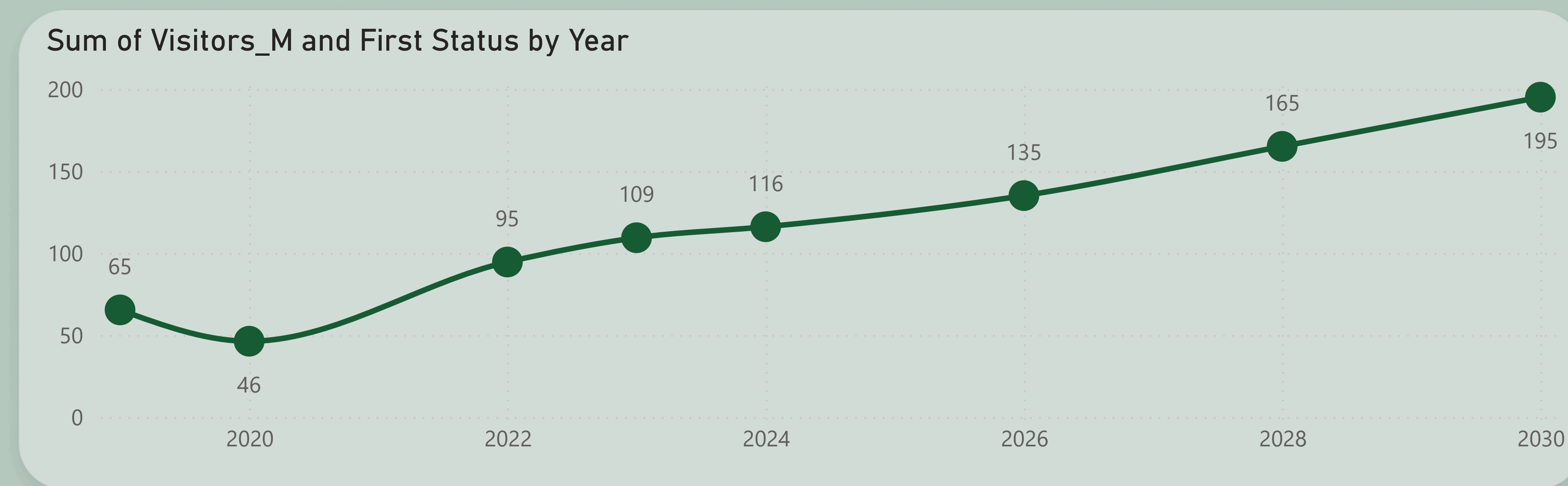
Vision 2030 Progress Tracker

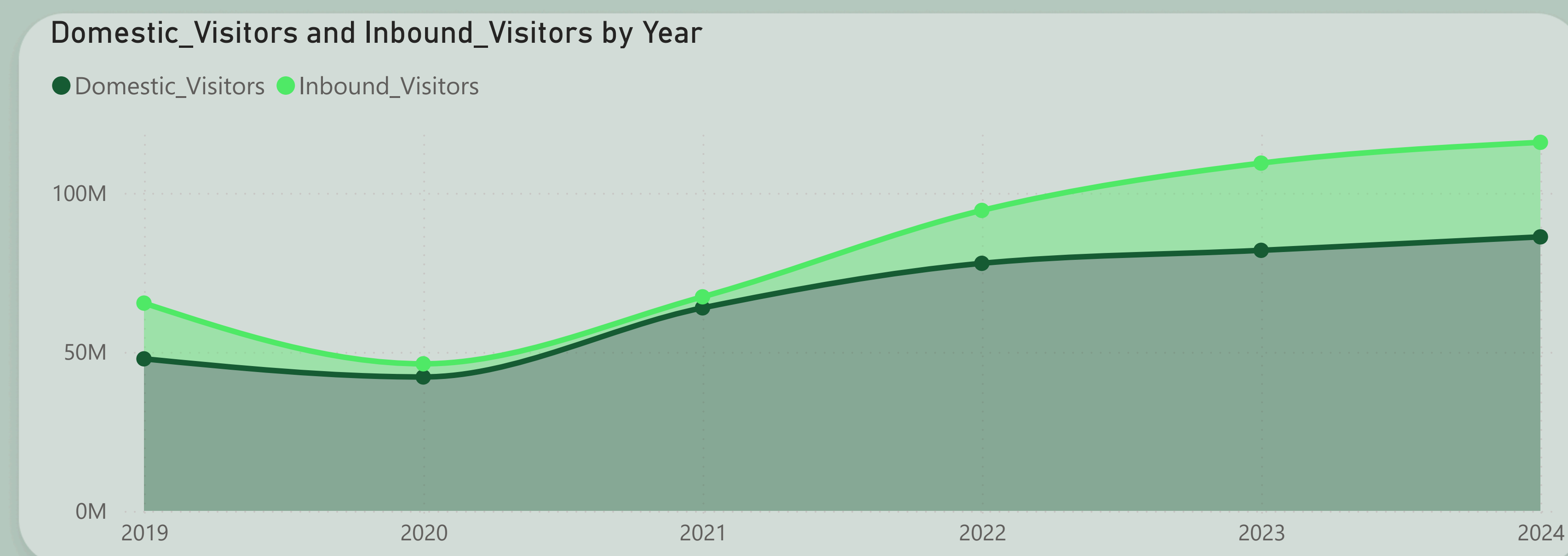
Ibrahim

Total_Spending_2024	284bn	▲ +11.0% vs 2023
Spending_Per_Visitor_2024	2.45K ⃁	▲ +4.8% vs 2023
Total_Visitors_2024	116M	-29% vs Target
Avg_Length_of_Stay_2024	9.48	▲ +1.0 nights vs 2023
Spending_Per_Night_2024	258.27 ⃁	▼ -6.3% vs 2023

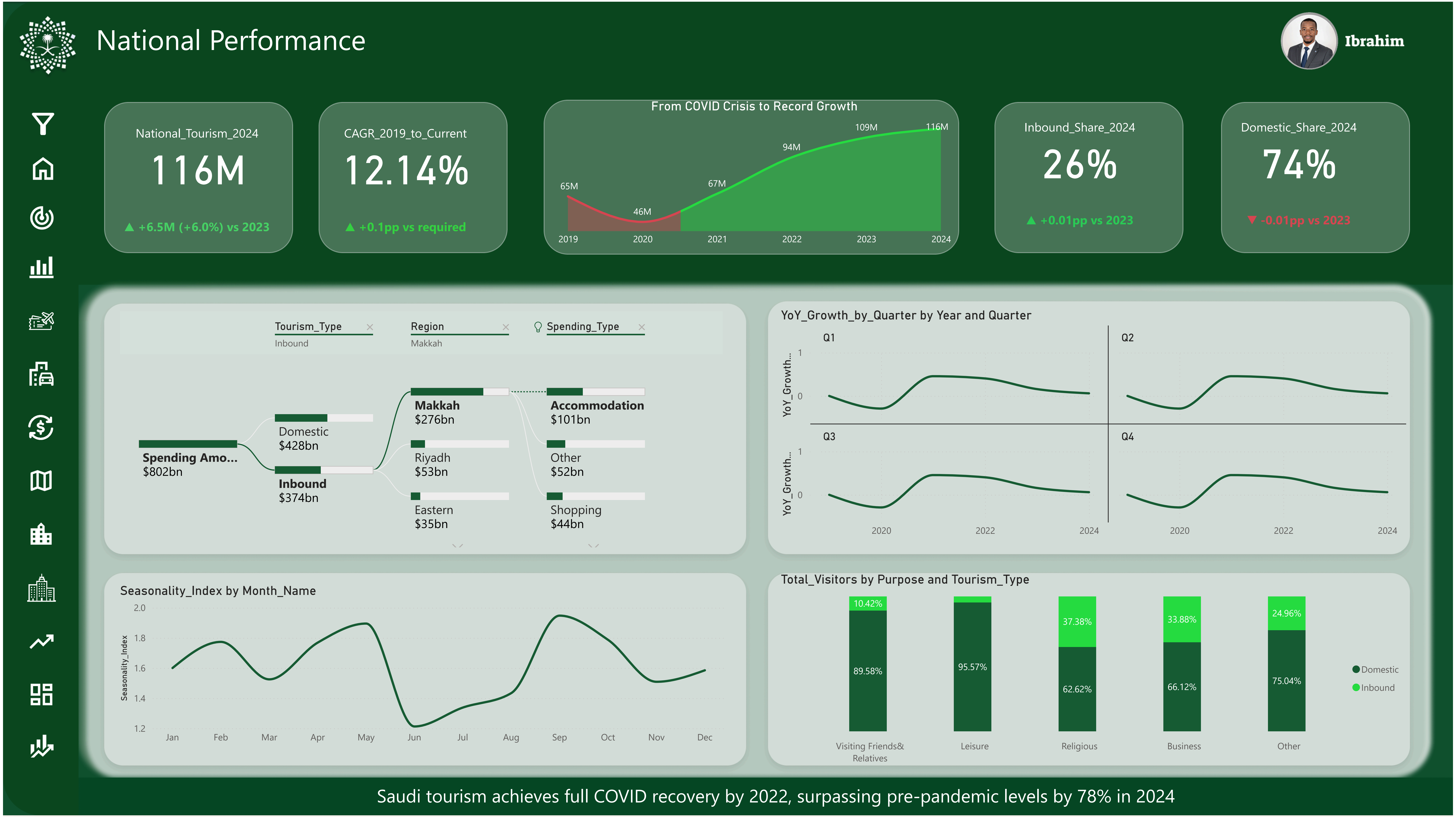
Ahead of Pace







Domestic tourism thriving at 86M visitors alongside 30M international—balanced growth strategy exceeding Vision 2030 expectations

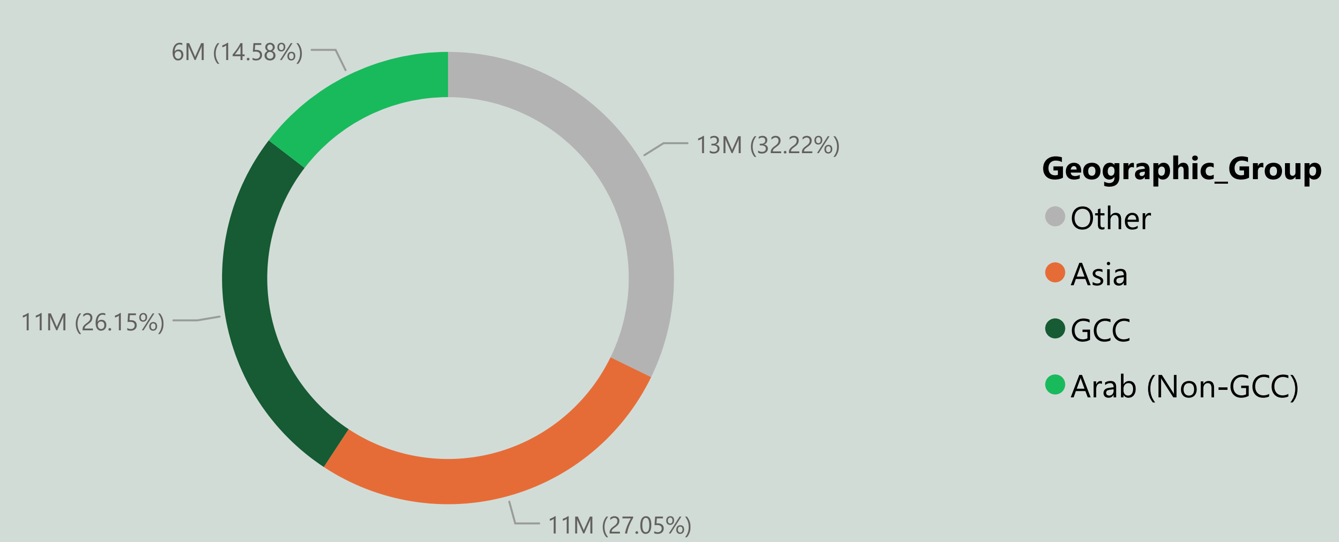

National Performance
Ibrahim
National_Tourism_2024
116M
▲ +6.5M (+6.0%) vs 2023
CAGR_2019_to_Current
12.14%
▲ +0.1pp vs required
From COVID Crisis to Record Growth
65M
46M
67M
94M
109M
116M
2019
2020
2021
2022
2023
2024
Inbound_Share_2024
26%
▲ +0.01pp vs 2023
Domestic_Share_2024
74%
▼ -0.01pp vs 2023
Tourism_Type
Inbound
Region
Makkah
Spending_Type
Spending Amo...
$802bn
Domestic
$428bn
Inbound
$374bn
Makkah
$276bn
Riyadh
$53bn
Eastern
$35bn
Accommodation
$101bn
Other
$52bn
Shopping
$44bn
YoY_Growth_by_Quarter by Year and Quarter
Q1
Q2
Q3
Q4
YoY_Growth...
1
0
2020
2022
2024
Seasonality_Index by Month_Name
Seasonality_Index
2.0
1.8
1.6
1.4
1.2
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Total_Visitors by Purpose and Tourism_Type
10.42%
89.58%
95.57%
37.38%
62.62%
33.88%
66.12%
24.96%
75.04%
Visiting Friends& Relatives
Leisure
Religious
Business
Other
Domestic
Inbound
Saudi tourism achieves full COVID recovery by 2022, surpassing pre-pandemic levels by 78% in 2024

Market Intelligence & Diversification

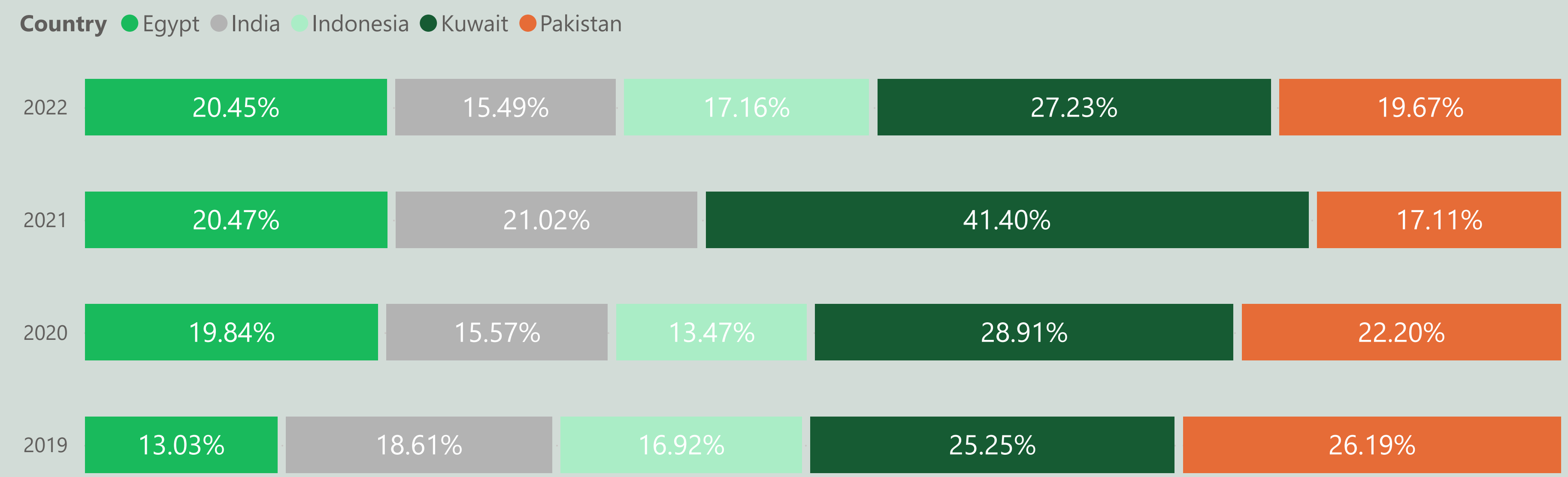
Ibrahim

Top_Source_Market_Excluding_Others	Tourism_Diversification_Score	Market_Concentration_Final
Kuwait 5.3M (13%)	-94.00	0.94

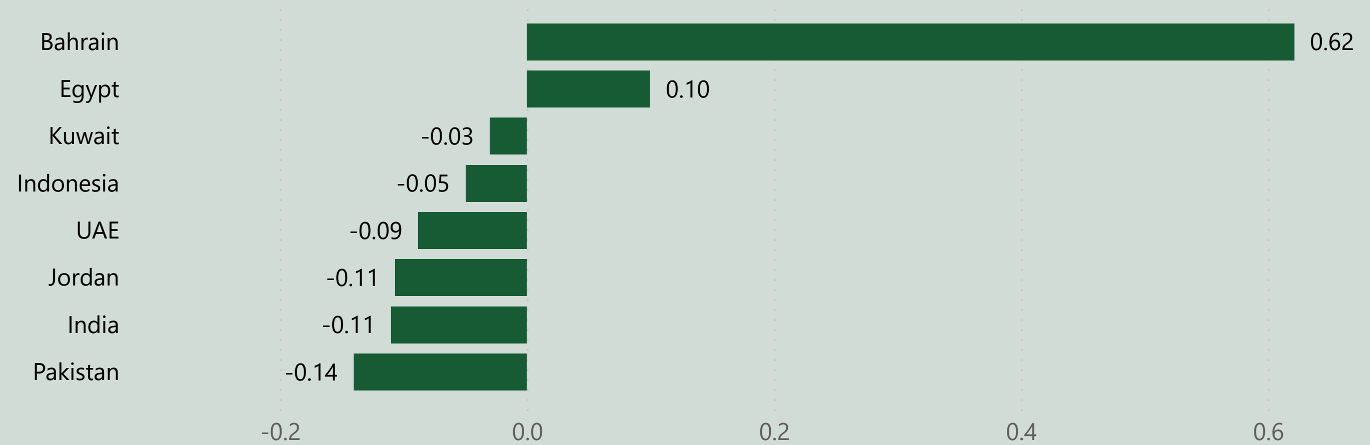
Total Visitors by Geographic Group



Total Visitors by Year and Most top 5 countries



CAGR_by_Country_2019_2022 by Country



Top 10 Countries Inbound Visitors from 2019 - 2022

Country	Total Visitors	Avg of Market Share
Kuwait	5.3M	0.14
Pakistan	4.4M	0.10
India	3.3M	0.08
Egypt	3.3M	0.09
Indonesia	3.0M	0.08
Bahrain	2.9M	0.08
Jordan	1.9M	0.05
UAE	1.5M	0.04
Qatar	1.0M	0.06
America	1.0M	0.04

Other Countries Visitors

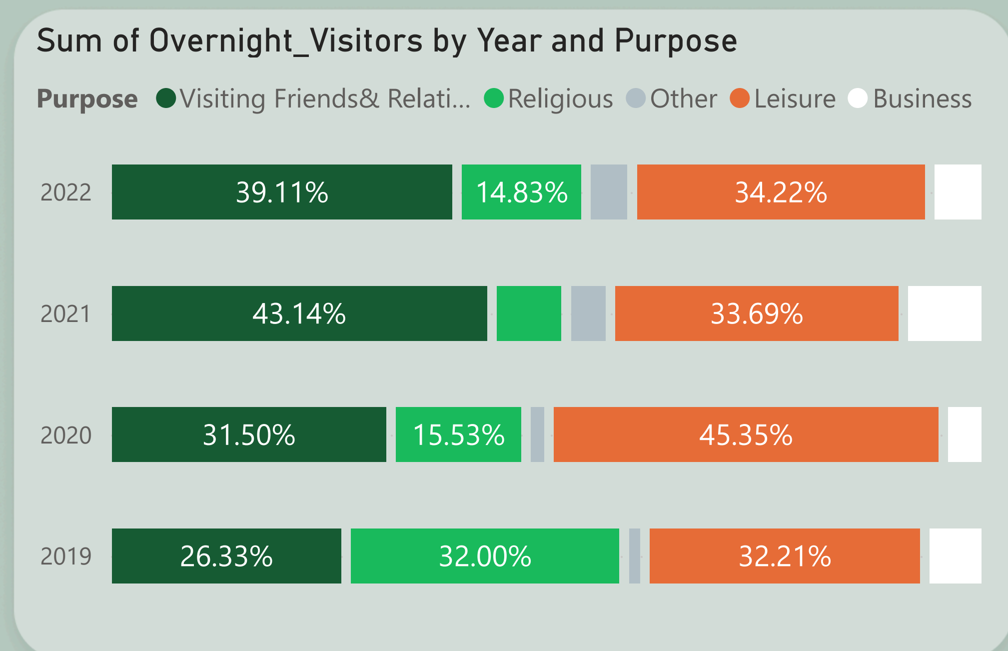
12M

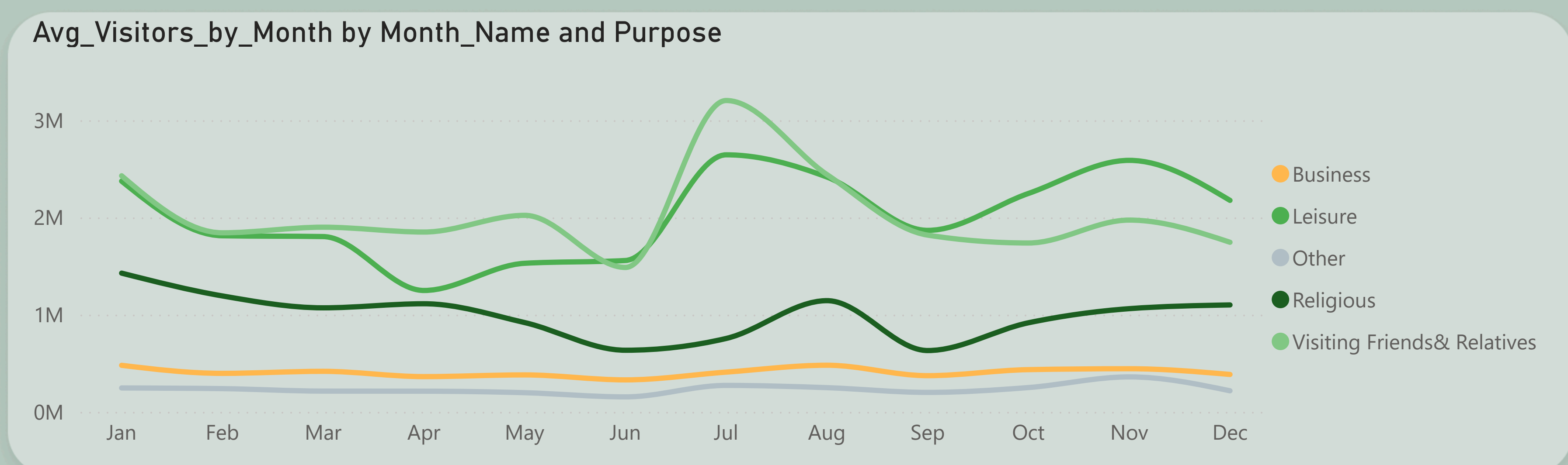
Kuwait, Pakistan, and India form top-3 source markets (13M combined) with CAGR variation 0.01-0.62 reflecting mature and emerging market mix"

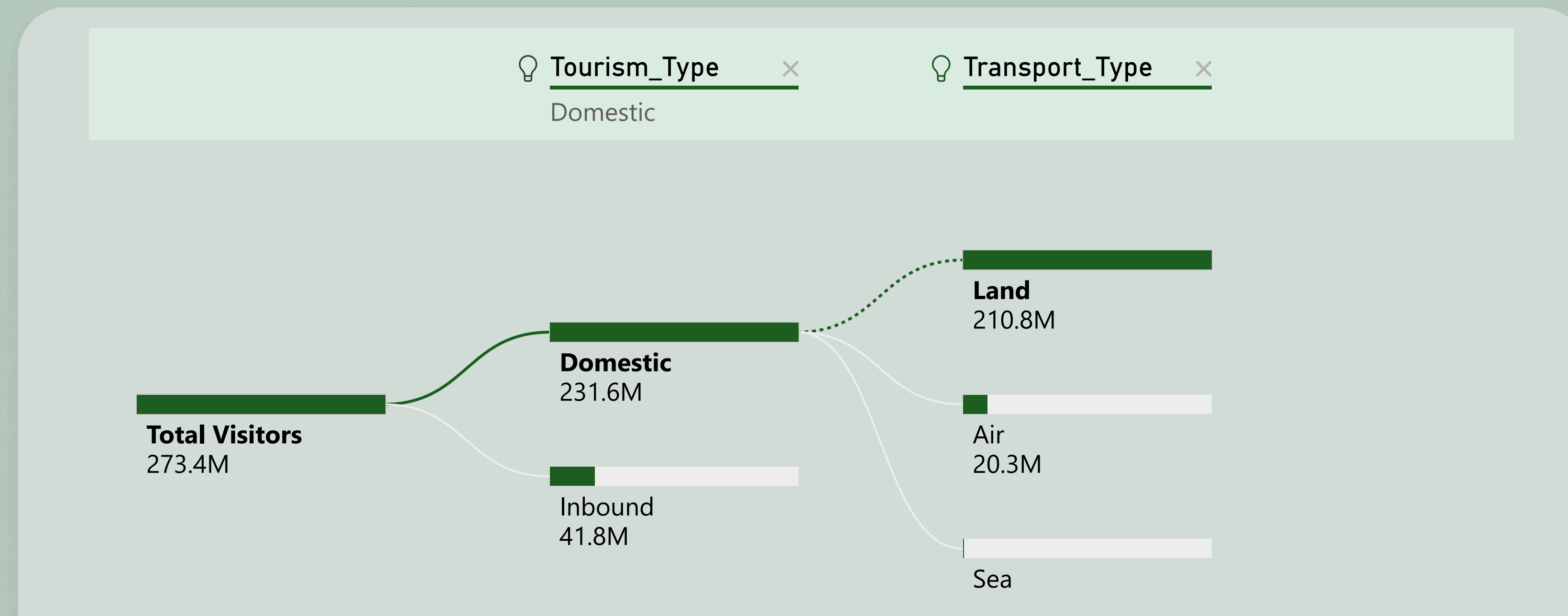
Purpose & Transport Analysis

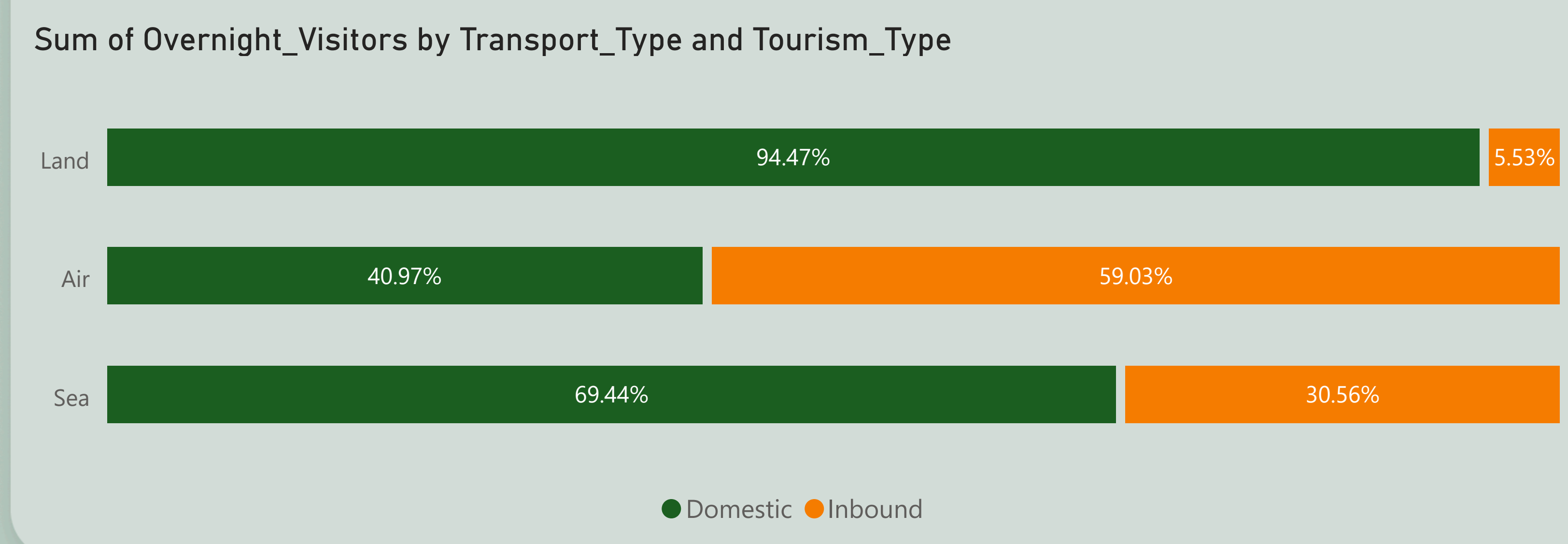
VFR_Tourism_%	Leisure_Tourism_%	Air_Travel_%	Land_Travel_%
35.8%	35.5%	18.1%	81.6%
VFR_CAGR_2019_2022 ▲ +29.0%	Leisure_CAGR_2019_2022 ▲ +15.4%	Air_Travel_CAGR_2019_2022 ▼ -2.0%	Land_Travel_CAGR_2019_2022 ▲ +18.0%

Purpose	Visitors	CAGR	2022 Share	Trend
Visiting Friends& Relatives	98M	29.0%	39.1%	▲▲▲
Leisure	97M	15.4%	34.2%	▲▲
Religious	48M	-12.5%	14.8%	▼▼
Business	20M	10.1%	6.5%	▲▲
Other	11M	47.8%	5.3%	▲▲▲









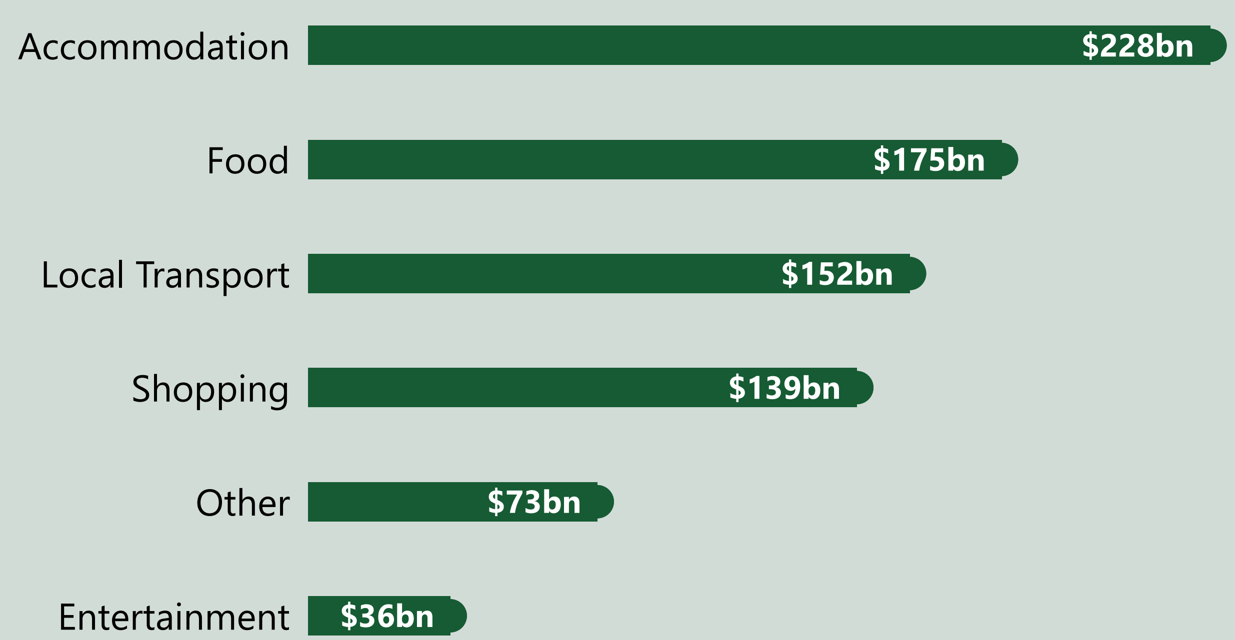
"VFR & Leisure dominate (71%) as land transport surges (+18%)—domestic tourism drives transformation"

Tourism Spending Deep Dive

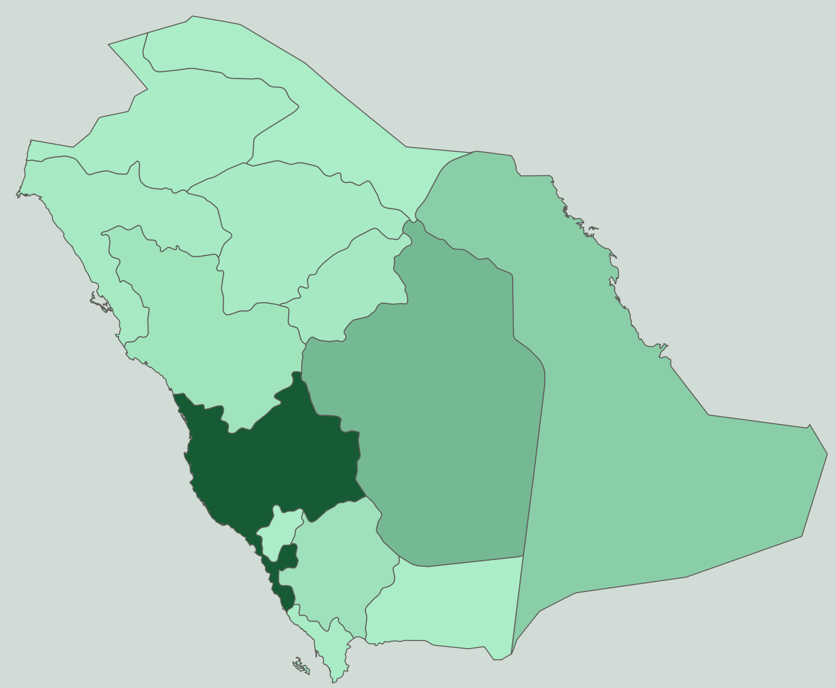
Ibrahim

Total Spending 2024	Spending Per Visitor 2024	Spending Per Night 2024	Quality Index 2024
284bn	2.45K	258.27	1.05
▲ +11.0% vs 2023	▲ +4.8% vs 2023	▼ -6.3% vs 2023	▲ +0.03 vs 2023

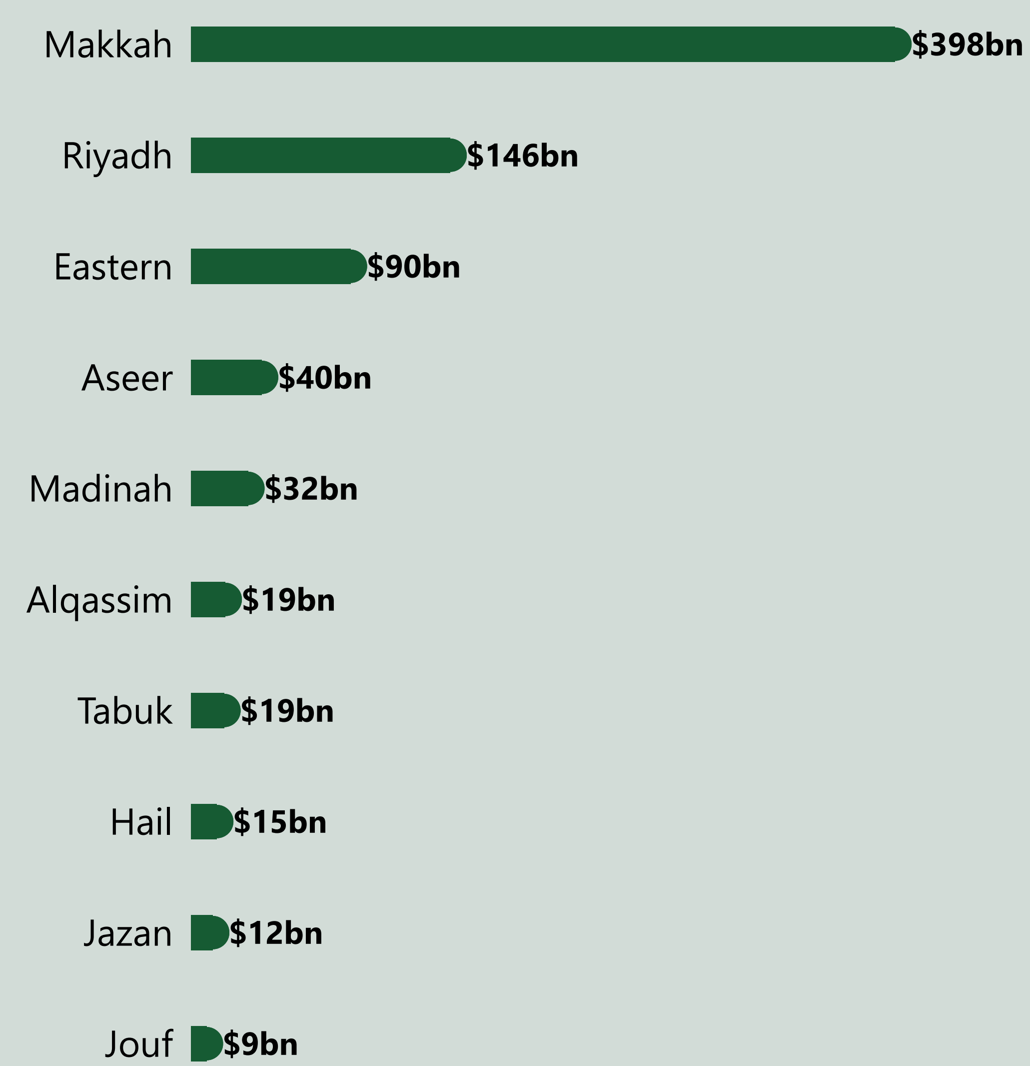
Spending by Type



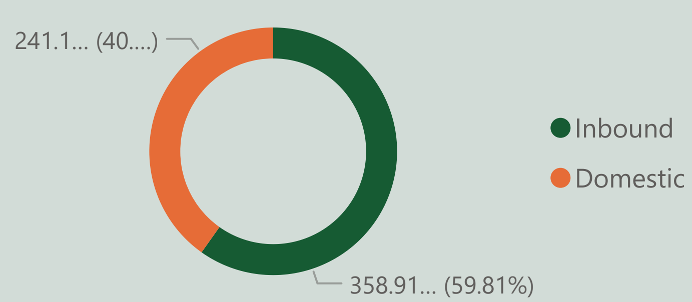
Regional_Spending by Region



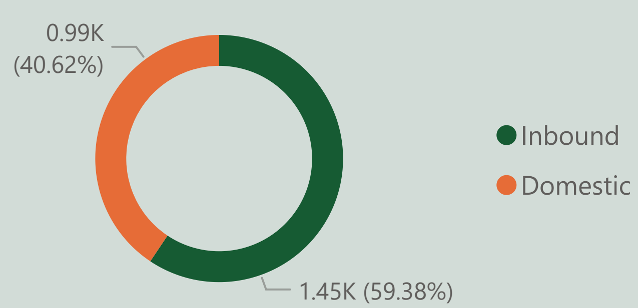
Spending by Region



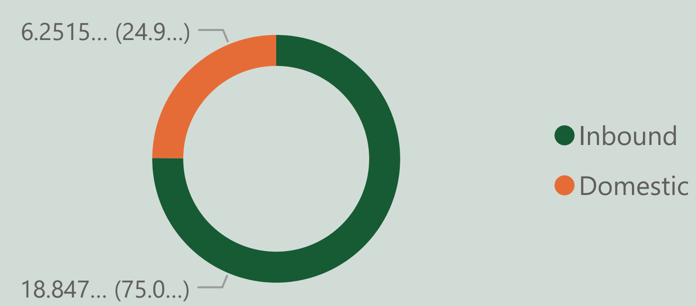
Spending Per Night by Tourism Type



Spending Per Visitor 2024 by Tourism Type



Avg Length of Stay 2024 by Tourism Type



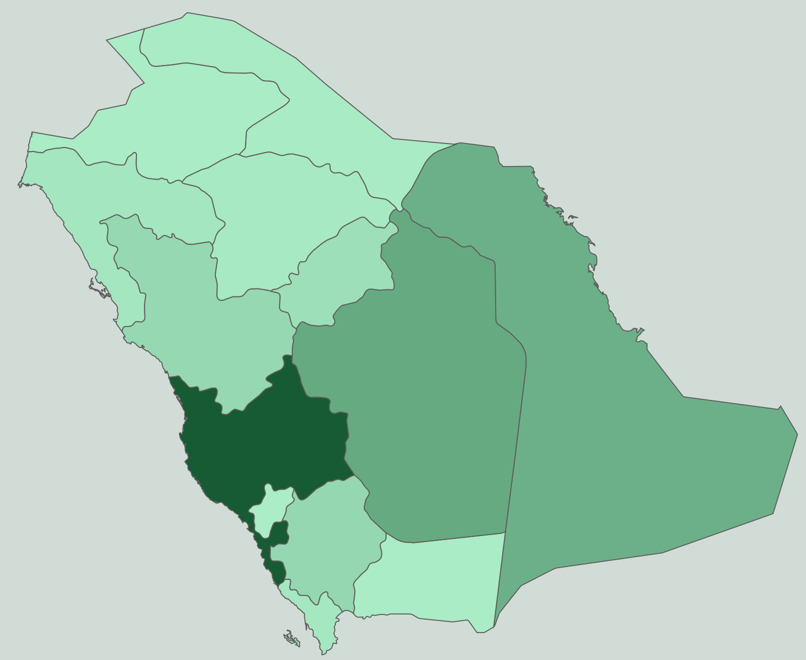
"Makkah and Riyadh account for 65% of national tourism spending"

Regional Investment Opportunities

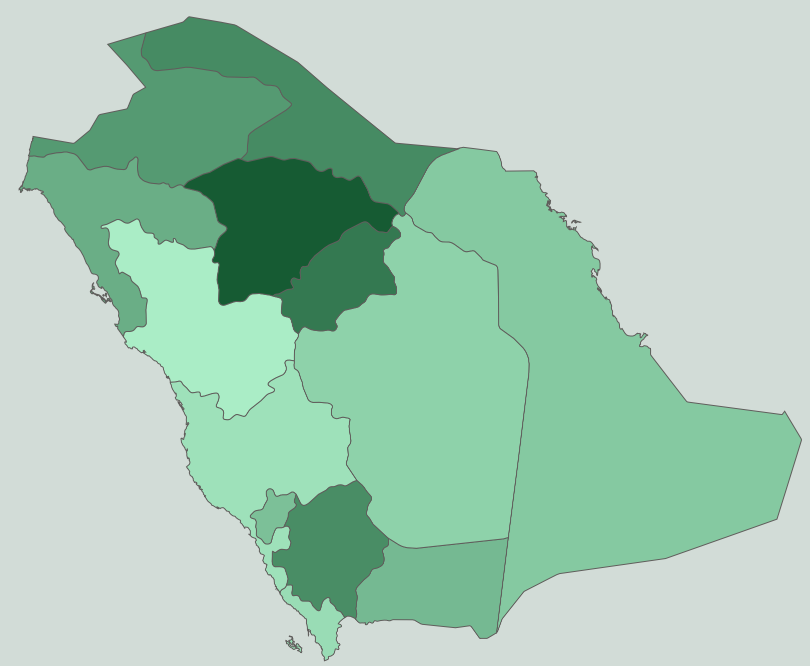
Ibrahim

Current Hotel Rooms	Highest Growth	Largest Market	Biggest_Gap_Region
475K	Alqassim 27.3% CAGR	Makkah 43M visitors	Makkah 74K rooms gap...

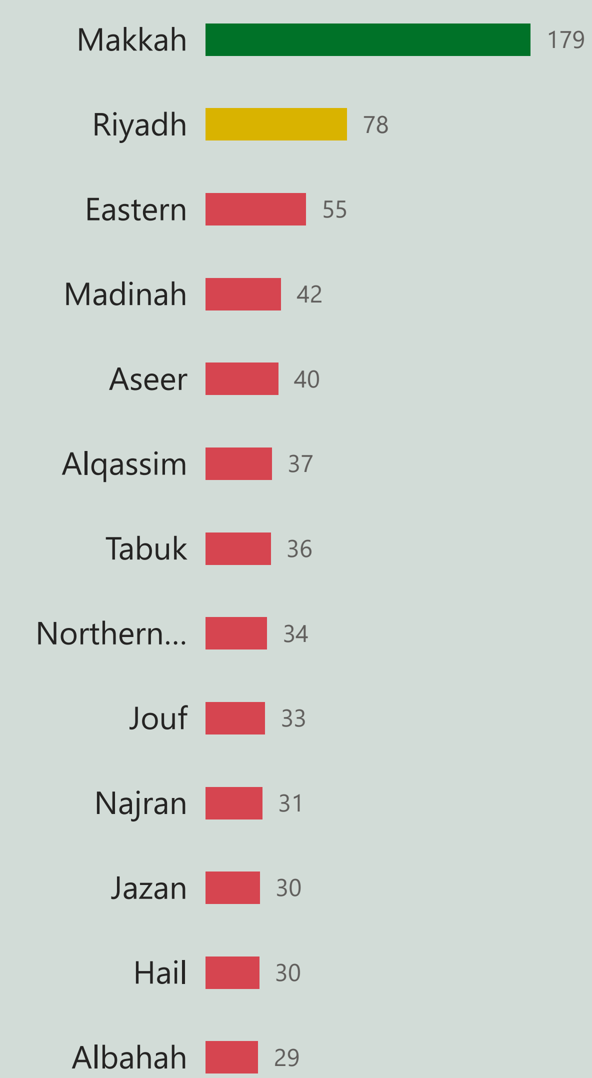
Regional Rooms Gap by Region



Demand Pressure Index by Region



Investment_Priority_Score by Region

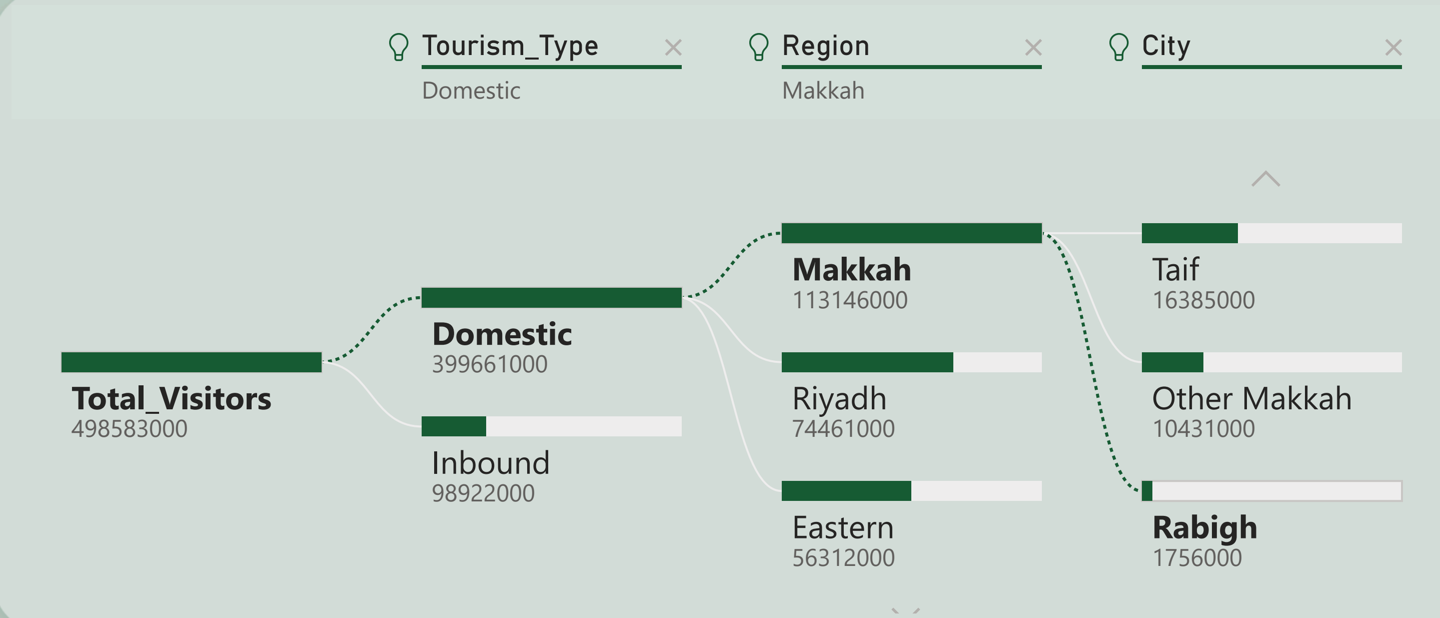


Regional_Rank	Region	Investment_Priority_Score	Total_Visitors_2024	Regional_Official_Gap	CAGR_by_Region	Demand_Pressure_Index	Gap_Share_of_National
1	Makkah	179	43M	74K	9.8%	0.79K	37.2%
2	Riyadh	78	20M	35K	18.2%	1.46K	17.7%
3	Eastern	55	19M	32K	20.3%	1.84K	16.1%
4	Madinah	42	7M	12K	-0.4%	0.30K	6.2%
5	Aseer	40	7M	13K	8.6%	4.35K	6.5%

Total infrastructure gap: 200K rooms needed across all regions

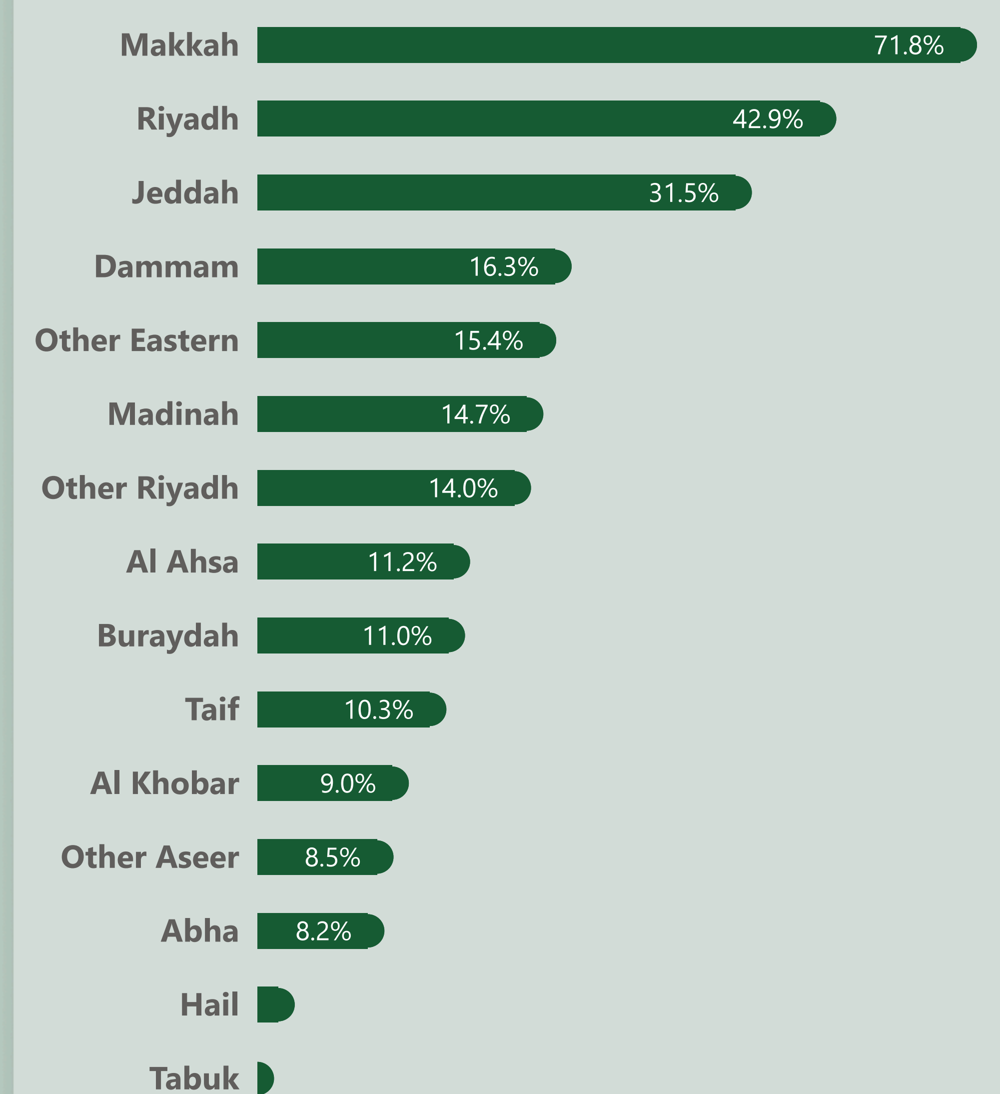
City-Level Investment Opportunities

Top_City_by_Visitors	Fastest_Growing_City	Highest_Pressure_City
Makkah 94M visitors	Al Ahsa 42.0% CAGR	Makkah 316.7x demand/supply



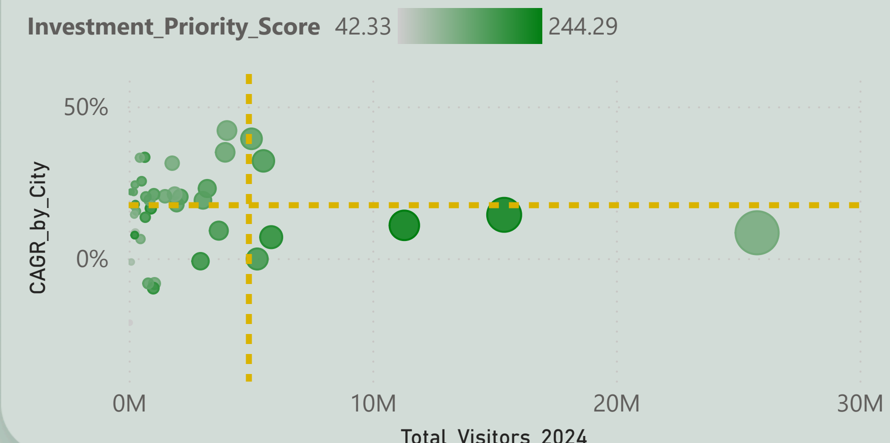
Total_Visitors by City

Top 15 Cities by visitors per room



City	Region	Investment_Priority_Score	Total_Visitors_2024	CAGR_by_City	Visitors_Per_Room
Jeddah	Makkah	244	11.3M	10.81%	31.5%
Riyadh	Riyadh	237	15.4M	14.27%	42.9%
Dammam	Eastern	207	5.9M	6.91%	16.3%
Arar	Northern Borders	204	0.9M	16.39%	2.5%
Other Najran	Najran	203	0.2M	7.59%	0.7%
Yanbu	Madinah	193	1.0M	-9.87%	2.8%
Abha	Aseer	191	2.9M	-1.01%	8.2%
Unayzah	Alqassim	186	0.7M	13.47%	1.9%
Madinah	Madinah	183	5.3M	-0.27%	14.7%
Al Ula	Madinah	182	0.7M	33.22%	1.8%

Total_Visitors_2024, CAGR_by_City and Visitors_Per_Room by City

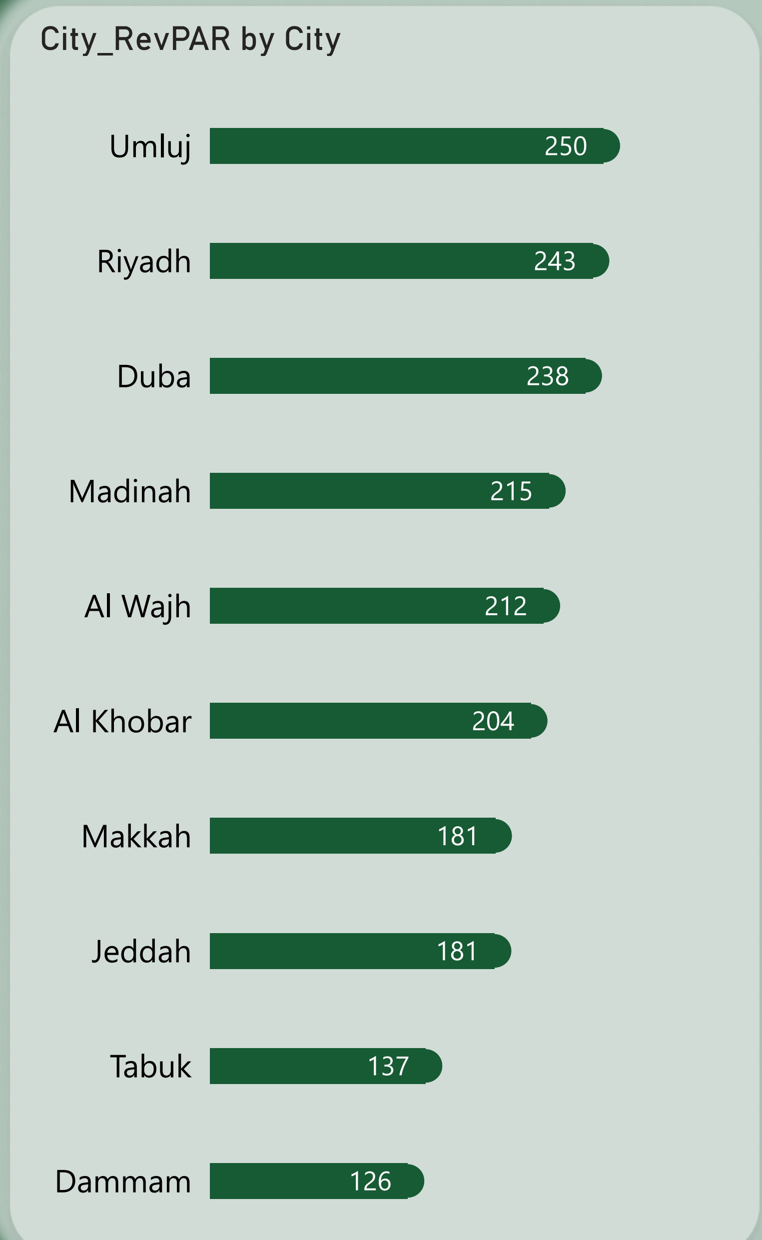


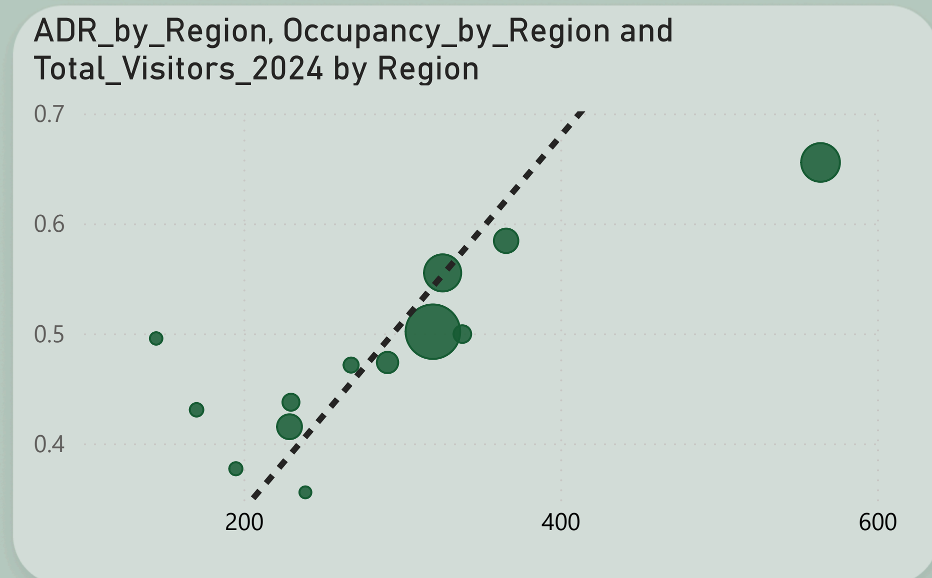
Beyond the big 3 (Makkah, Riyadh, Jeddah), emerging cities like AlUla and Tabuk present high-growth investment opportunities with lower competition

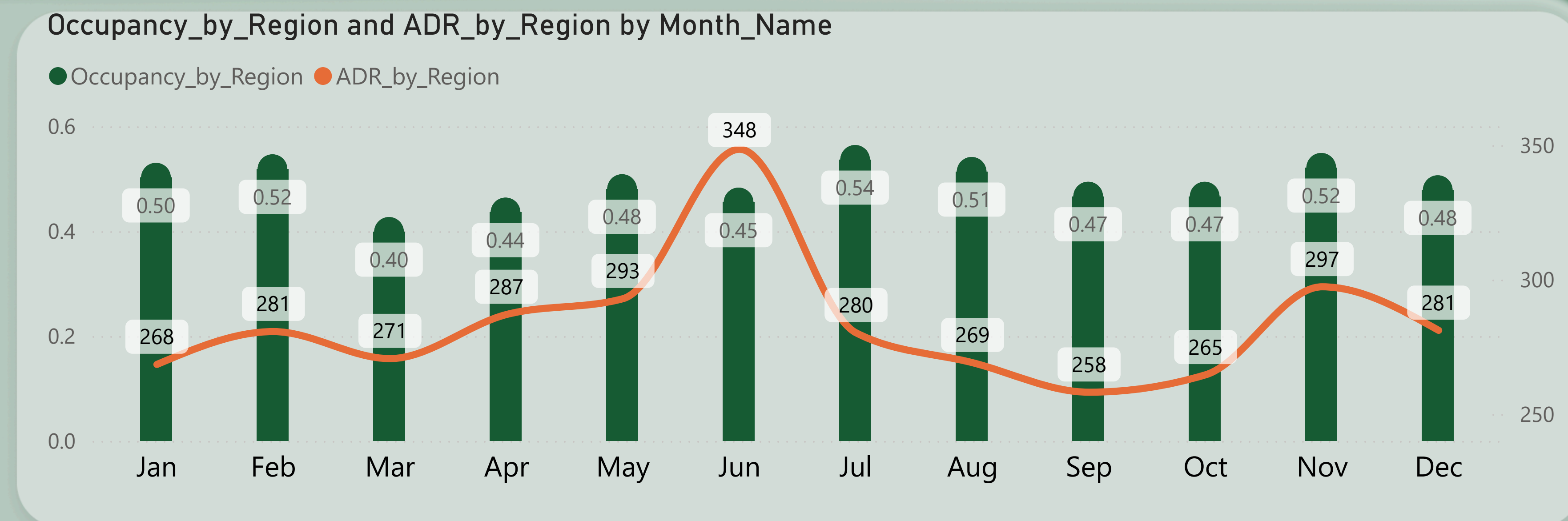
Hotel Performance

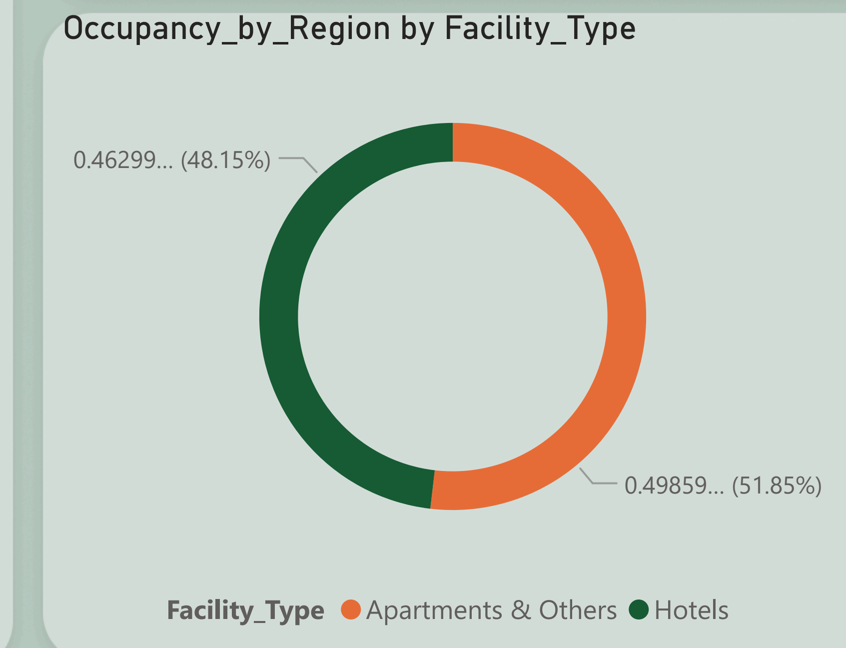
Ibrahim

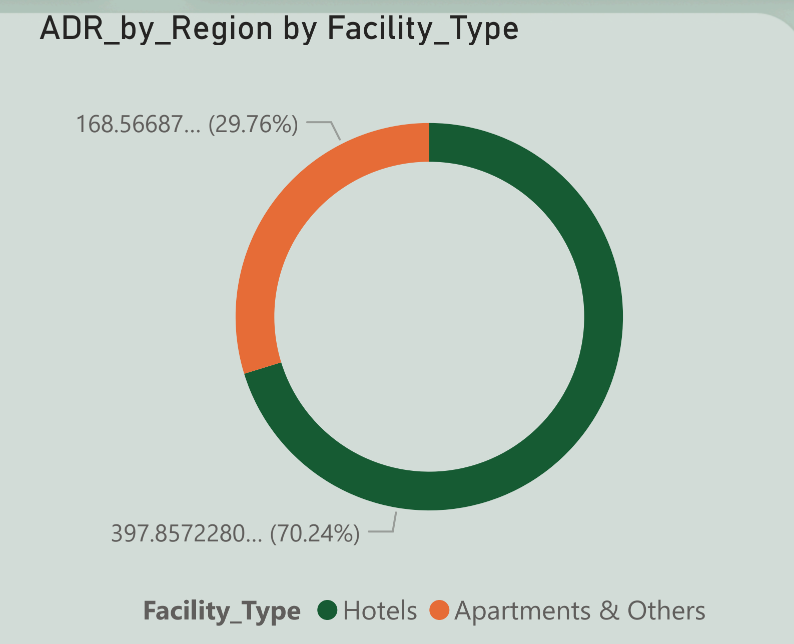
Avg_ADR_Current	Avg_Occupancy_Current	RevPAR_Current	Current_Hotel_Rooms	Room_Gap
283.21 ⃁	48%	136.17 ⃁	475K	200K
▼ -4.7% vs last month	▼ +0.0pp vs last month	▼ -12.1% vs last month		











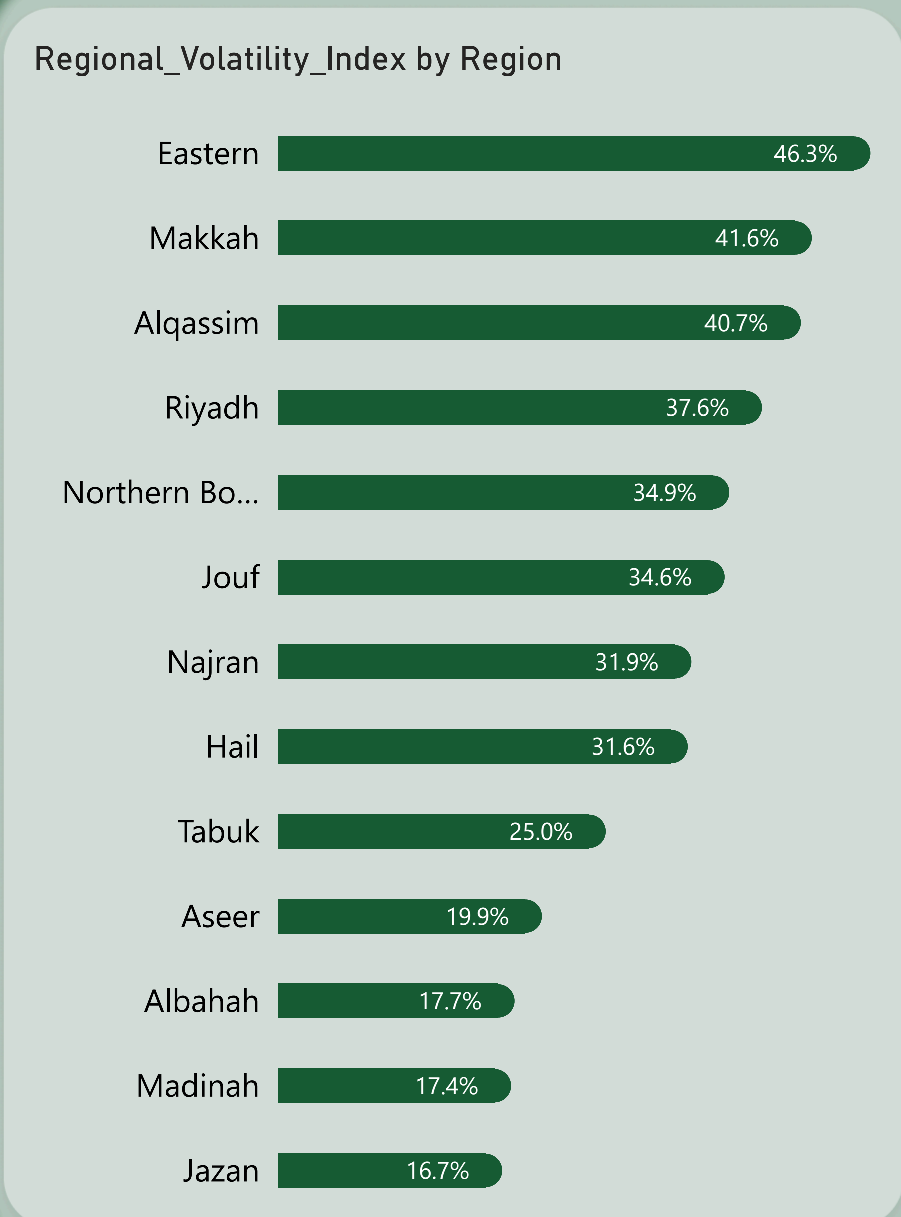
Region	ADR	Occupancy	RevPAR
Riyadh	564	0.66	370
Madinah	366	0.58	214
Eastern	326	0.55	181
Tabuk	338	0.50	169
Makkah	320	0.50	160
Alqassim	291	0.47	138
Hail	268	0.47	126
Jazan	230	0.44	101
Aseer	229	0.42	95
Albahah	239	0.36	85
Jouf	195	0.38	74
Northern Borders	170	0.43	73
Najran	145	0.50	72

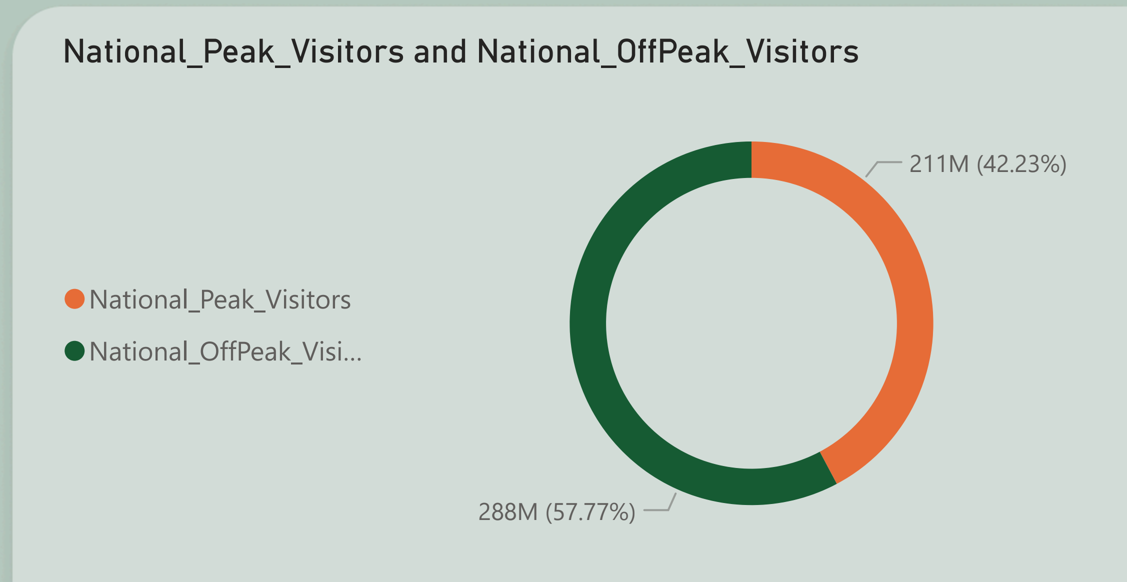
Makkah achieves 181 SAR RevPAR (highest nationally) driven by 68% occupancy during peak religious seasons

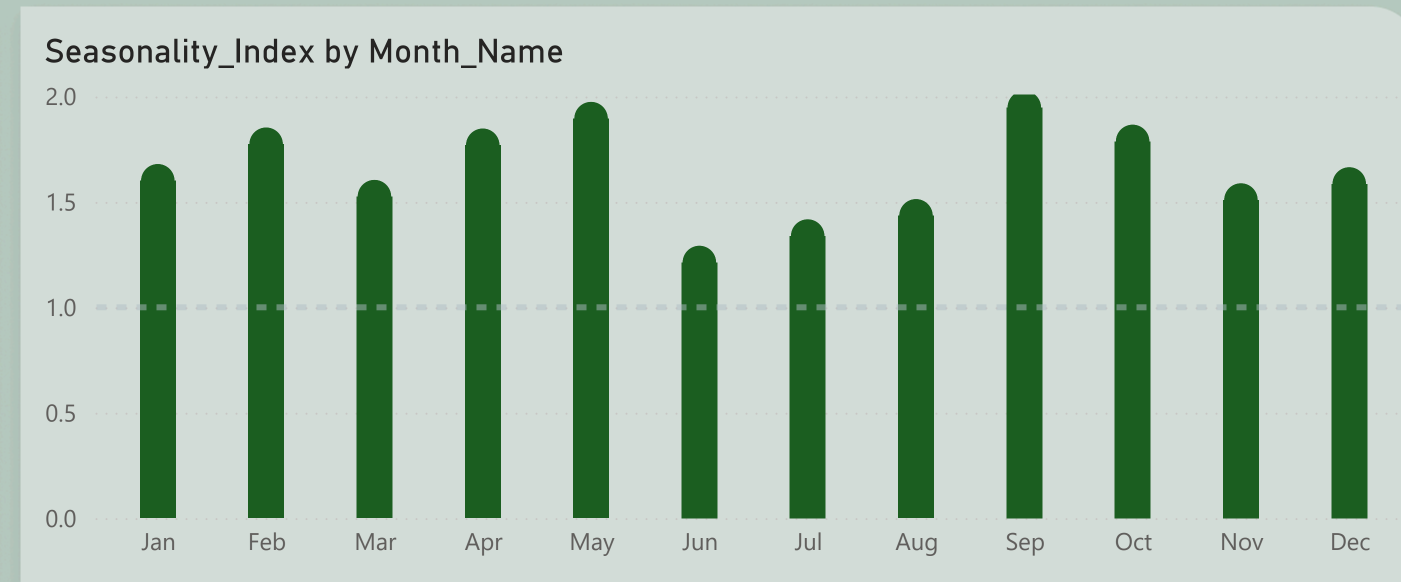
Seasonality & Demand Planning

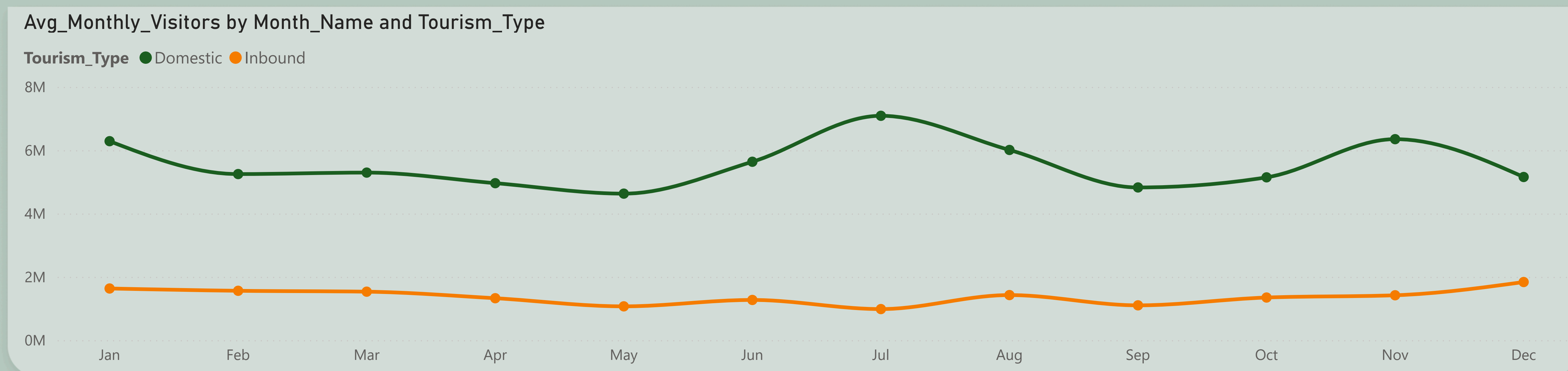
Ibrahim

Peak_Month_Name	OffPeak_Month_Name	Seasonality_Variance	Avg_Stay_Peak_Season
July	May	0.42	9.22









"Summer surge: July +45% above average, driven by domestic leisure and Hajj pilgrimage"

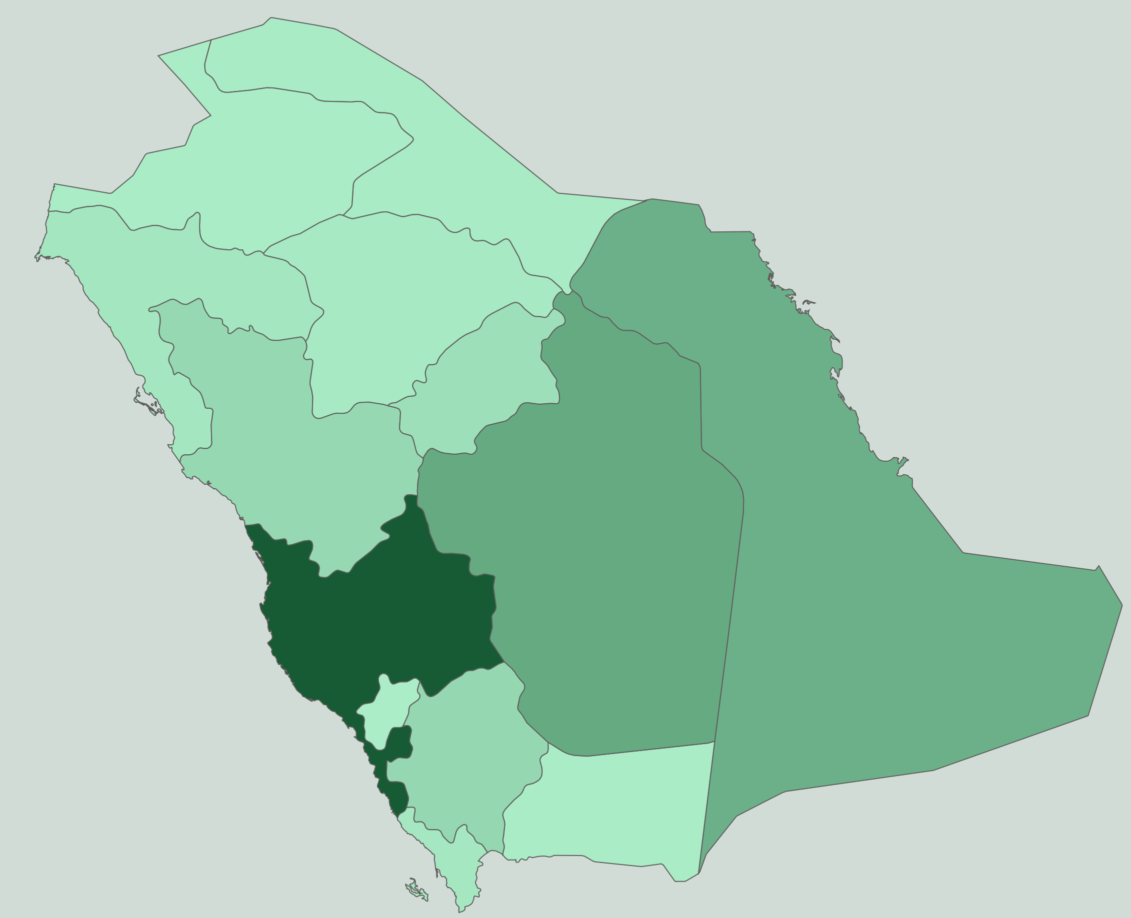
Supply & Demand Balance

Ibrahim

Current_Hotel_Rooms	Target_Rooms_Official_2030	Room_Gap	Demand_Pressure_Index
475K	675K	200K	1.02K

Region	Avg_Occupancy	YoY_Growth_Latest	Investment_Priority_Score	Gap_Share_of_National	Regional_Official_Gap	Demand_Pressure_Index
Makkah	50%	9%	179.05	37.2%	74,314	0.79K
Riyadh	66%	6%	77.93	17.7%	35,308	1.46K
Eastern	55%	-3%	55.29	16.1%	32,174	1.84K
Madinah	58%	13%	41.55	6.2%	12,356	0.30K
Aseer	42%	6%	40.01	6.5%	12,927	4.35K
Alqassim	47%	11%	36.53	4.5%	8,957	5.20K
Tabuk	50%	10%	35.90	2.8%	5,597	2.97K
Northern Borders	43%	13%	33.81	1.4%	2,791	4.45K
Jouf	38%	12%	32.69	1.3%	2,573	3.82K
Najran	50%	9%	31.26	1.1%	2,214	2.49K
Jazan	44%	0%	29.93	2.5%	5,090	1.02K
Hail	47%	-1%	29.54	1.9%	3,740	6.46K
Albahah	36%	4%	28.92	1.0%	1,959	2.22K

Regional Gap, Gap Share of National and Demand Pressure Index by Region



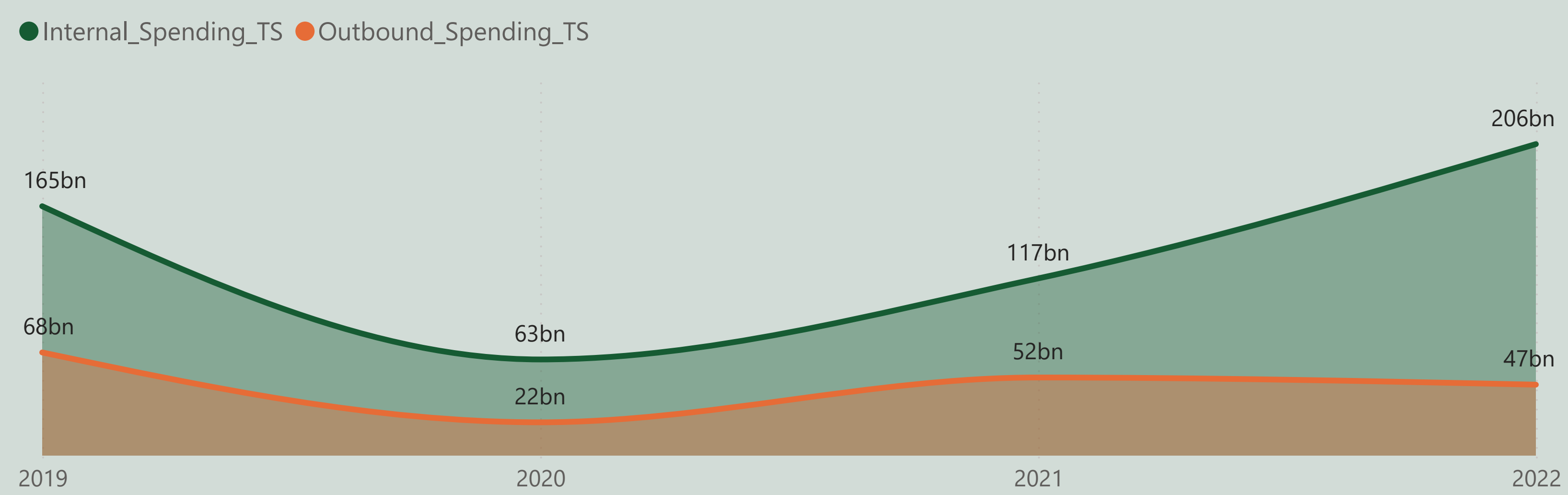
Official 200K room target distributed strategically: Makkah 74K (37%), Riyadh 35K (18%), Eastern 32K (16%)—investment priorities align with demand pressure and growth trajectories

Economic Impact

Ibrahim

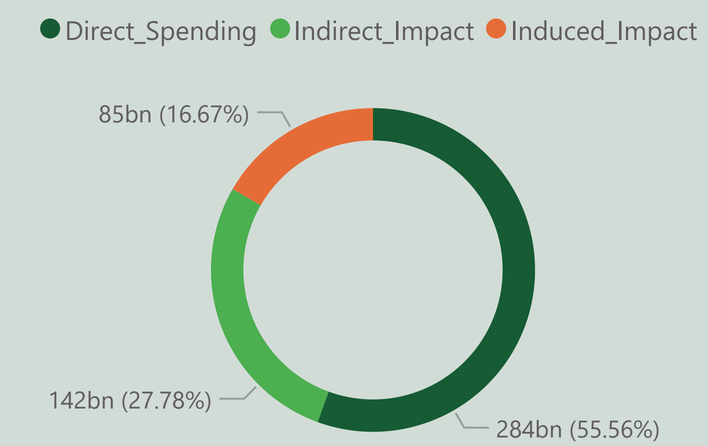
Total_Economic_Impact	Tourism_GDP_Contribution	Jobs_Supported	Net_Foreign_Exchange
511bn ⃁	7.1%	511K	362bn

Internal_Spending_TS vs Outbound_Spending_TS by Year

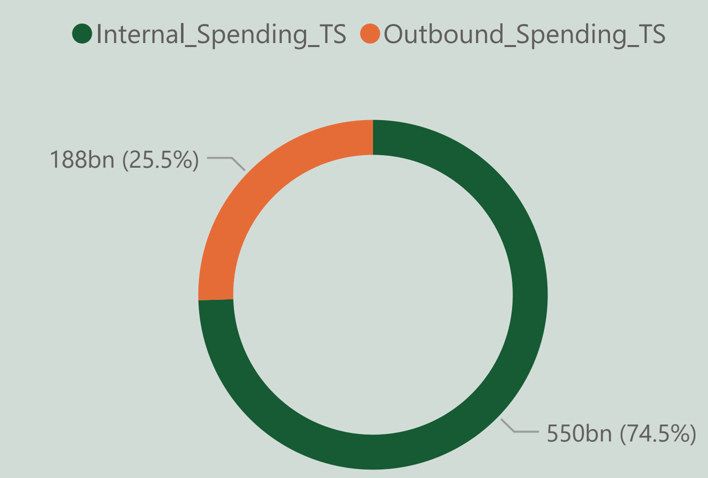


Region	Direct_Spending	Indirect_Impact	Induced_Impact	Total_Economic_Impact	Jobs_Supported
Makkah	171bn	86bn	51.4bn	309bn	309K
Riyadh	40bn	20bn	12.0bn	72bn	72K
Eastern	25bn	13bn	7.5bn	45bn	45K
Madinah	9bn	5bn	2.8bn	17bn	17K
Aseer	9bn	5bn	2.7bn	16bn	16K
Alqassim	7bn	4bn	2.2bn	13bn	13K
Tabuk	6bn	3bn	1.7bn	10bn	10K
Hail	4bn	2bn	1.2bn	7bn	7K
Northern Borders	3bn	2bn	0.9bn	5bn	5K
Jazan	3bn	1bn	0.9bn	5bn	5K

Distrubution of Direct_Spending, Indirect, Induced_Impact



Internal_Spending_TS vs Outbound_Spending_TS



Total_Economic_Impact by Region

Economic transformation delivered: Direct SAR 284bn tourism spending creates 511K jobs through 1.8x multiplier effect, with 7.1% GDP contribution advancing toward