Saudi Hotel Stay Horizon 2026

Unlocking Next-Generation Guest Preferences and Commercial Realities in Kingdom Hospitality

Executive Research Report

July 28, 2026 · Sentink Survey Platform · n = 137 respondents

Domestic leisure and family travel define the emerging backbone of Saudi hospitality demand

64%

Family with children is the most common travel companion group

54%

Leisure is the primary driver for travel within Saudi Arabia

72%

Privacy is rated as a 'very important' factor by travellers

42%

A well-known Saudi brand is preferred when price and location are equal

WHAT THIS MEANS FOR THE BUSINESS

- The increasing reliance on domestic leisure and family travel, which accounts for nearly half of all trips (47% travel with family, 39% for leisure), establishes a new cornerstone for the Saudi hospitality sector. This shift demands a strategic pivot from catering to transient business or niche tourism to building loyalty within a broad domestic consumer base.
- While global brands are a familiar choice (32% prefer them), a significant portion of the market (42%) actively favors Saudi brands when other factors are equal. This preference is driven by trust in service quality (67%) and a growing desire to support national enterprises (26%), signaling a ripe opportunity for local players to capture market share.
- The data, gathered from 137 respondents, highlights that the core of Saudi hospitality demand is evolving. Understanding and actively catering to the needs of domestic families seeking leisure experiences, while reinforcing the appeal of local brands, will be critical for future success.

Robust sample architecture across KSA nationals and residents validates key strategic findings

STUDY OBJECTIVES

- The robust sample architecture, encompassing both Saudi nationals and residents across the Kingdom, validates the strategic importance of understanding the evolving demands of the next generation of travelers.
- A deep dive into segment differences reveals that while overall travel frequency is moderate, Saudi nationals (58% of sample) are significantly more likely to have taken 3-5 domestic trips in the last 12 months compared to residents (33% of sample), indicating a strong reliance on the domestic market for this core group.
- While cleanliness is universally critical (70% rate it 'Very Important'), privacy emerges as a surprisingly strong driver, with 72% rating it 'Very Important', particularly among those who also prioritize local design (52% of those rating both 'Very Important').
- The data underscores a clear willingness to pay for differentiated experiences, with 48% willing to pay up to 5% more and 21% willing to pay 6-10% more for an authentic Saudi cultural experience, suggesting a significant revenue opportunity beyond basic accommodation.

METHODOLOGY

Total Sample	**571**
Completed Interviews	**137**
Completion Rate	**24%**
Key Segments	**Saudi Nationals** (58%), **Residents** (33%)
Primary Trip Purpose	**Leisure** (39%), **Religious Tourism** (23%)
Most Valued Hotel Attributes	**Privacy** (72%), **Cleanliness** (70%), **Location** (55%)

01

Who We Heard From

Demographic and geographic composition of the survey sample

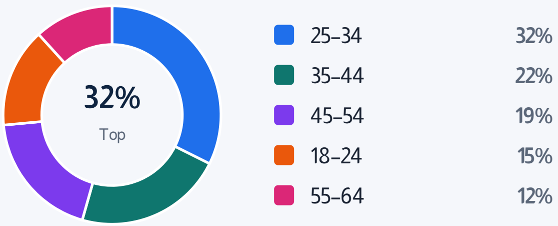
A balanced read across sample segments

RESPONDENT SNAPSHOT

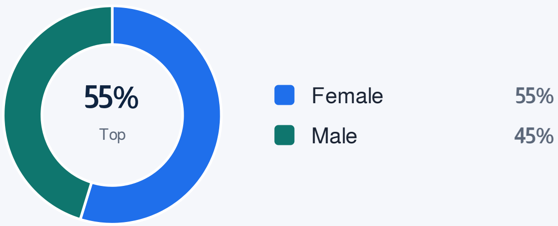
137
Total respondents

24%
Completion rate

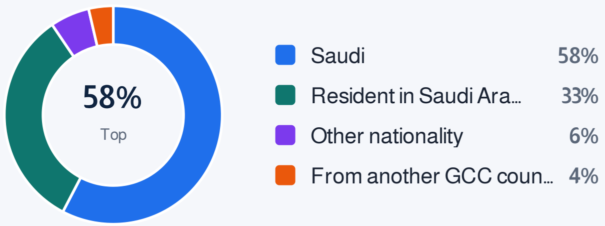
What is your age group?



What is your gender?



What is your nationality?



02

Trade-Off Drivers & Baseline Expectations

Price and physical space anchor hard choices while sustainability collapses under direct comparison

Price and physical space anchor hard choices while sustainability collapses under direct comparison

	ATTRIBUTE	RELATIVE IMPORTANCE	INDEX
1	Price	15.6%	156
2	Room comfort and size	15.4%	154
3	Technology and digital services	13.9%	139
4	Food quality and dining options	12%	120
5	Location	11.6%	116
6	Online customer reviews	10.1%	101
7	Hotel brand name	7.8%	78
8	Authentic local experience	6.7%	67
9	Wellness services	6.1%	61
10	Sustainability	0.7%	7

Dashed line = the average attribute (index 100). Above it is a genuine decision driver; below it is secondary.

FORCED TRADE-OFF — 137 RESPONDENTS ACROSS 822 TASKS

EXECUTIVE INSIGHT

Saudi Arabia's next generation of travelers are making clear-eyed trade-offs, anchoring their hotel choices first and foremost on price and the tangible comfort of their room. These are not fringe considerations; they have become the bedrock of decision-making, with 'Price' and 'Room comfort and size' emerging as the most powerful drivers in a forced-choice scenario. This signals that investments in these foundational elements are non-negotiable for capturing market share. Conversely, attributes like 'Sustainability', despite growing global importance, register negligible preference in direct comparison, suggesting that current efforts may not be translating into tangible booking advantages when weighed against more immediate traveler needs.

STRATEGIC IMPLICATION

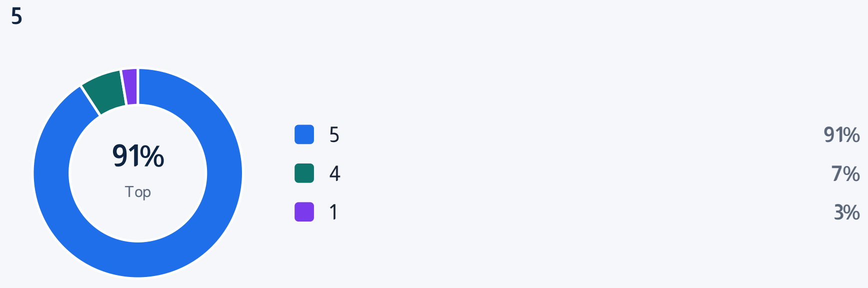
The primacy of price and physical space directly impacts revenue generation and competitive positioning. Over-investing in attributes with low preference scores, such as sustainability, risks diverting capital from core demand drivers, potentially eroding market share and hindering customer acquisition.

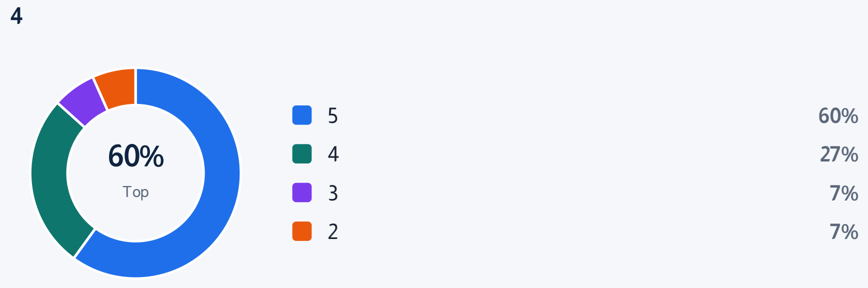
RECOMMENDED ACTIONS

1. Re-evaluate marketing spend to emphasize price competitiveness and room value proposition over aspirational, lower-preference attributes.
2. Conduct a rapid operational review to identify cost-saving opportunities that can be passed on as price advantages without compromising room comfort.
3. Pilot dynamic pricing models that offer clear, tiered value based on room size and amenities, directly addressing the 'room comfort and size' driver.

EXECUTIVE TAKEAWAY **Price and room comfort are king; sustainability is a luxury few will pay for today.**

Location and cleanliness operate strictly as table stakes rather than revenue levers





EXECUTIVE INSIGHT

The sample splits on "5" by 31 points between 5 and 4 — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

STRATEGIC IMPLICATION

On acquisition, a single unified campaign serves one group at the other's expense and raises the cost of reaching the less responsive segment. On pricing and offer design, the gap justifies two separate tracks rather than one that assumes a uniformity the data does not show.

RECOMMENDED ACTIONS

1. Split the 5 and 4 messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY **The overall average describes a sample, not any actual customer inside it.**

03

Family Travel Dynamics & Operational Requirements

Family travel dominates booking volume across all tier structures from midscale to 5-star properties

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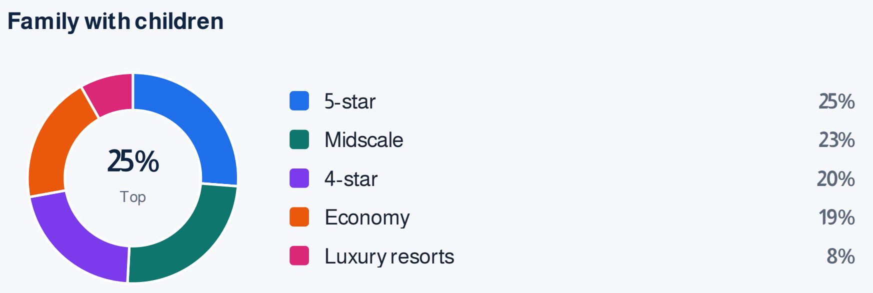

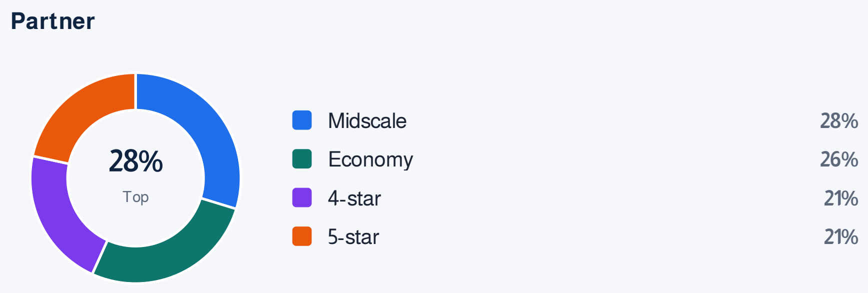

EXECUTIVE INSIGHT

The sample splits on "Luxury resorts" by 8 points between Family with children and Partner — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

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1. Split the Family with children and Partner messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY The overall average describes a sample, not any actual customer inside it.

Frictionless booking policies serve as an absolute prerequisite for family-focused guest acquisition

Booking Flexibility Importance

Family Suitability Importance

A STRONG POSITIVE CORRELATION EXISTS, PARTICULARLY AT THE HIGHEST IMPORTANCE RATINGS, INDICATING A CRITICAL LINKAGE BETWEEN THESE FACTORS.

EXECUTIVE INSIGHT

The landscape for family travel has fundamentally shifted beyond the appeal of child-friendly amenities alone. While previous assumptions focused on on-site facilities, the evidence reveals that for the vast majority of guests prioritizing family suitability, booking and cancellation flexibility has become an absolute prerequisite. Out of 89 respondents who rated hotel suitability for families as 'Very important' (5), a striking 69 (78%) also rated ease of booking and cancellation with the highest importance (5). This co-occurrence signals that families, navigating complex logistics and unpredictable schedules, will simply not consider properties that introduce transactional friction, regardless of their family-centric offerings. Executives must understand that this is no longer a differentiator but a baseline expectation for capturing this dominant segment.

STRATEGIC IMPLICATION

This strong coupling directly impacts customer acquisition and competitive position within the family segment. Inflexible booking policies create a significant barrier, actively deterring high-value family bookings and undermining product investments in family amenities. Operators failing to provide frictionless policies will see reduced conversion rates, ceding market share to competitors who prioritize transactional ease, thereby impacting overall revenue and retention.

RECOMMENDED ACTIONS

1. Implement a tiered, flexible cancellation policy specifically for family bookings, allowing last-minute changes without penalty.
2. Streamline the online booking journey for multi-room or multi-guest reservations, removing friction points that disproportionately affect family planners.
3. Reallocate marketing spend to highlight 'Book with Confidence' guarantees and flexible policy advantages, targeting family decision-makers.
4. Defer investment in new family entertainment amenities until booking policy friction is demonstrably resolved.

EXECUTIVE TAKEAWAY For family travelers, booking ease is not a perk; it is the gatekeeper to all other hotel experiences.

04

Experience Monetization & Cultural Design

Privacy requirements heavily govern guest demand for localized heritage architecture

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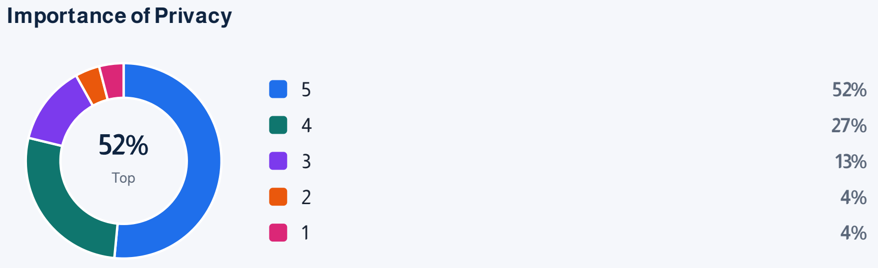
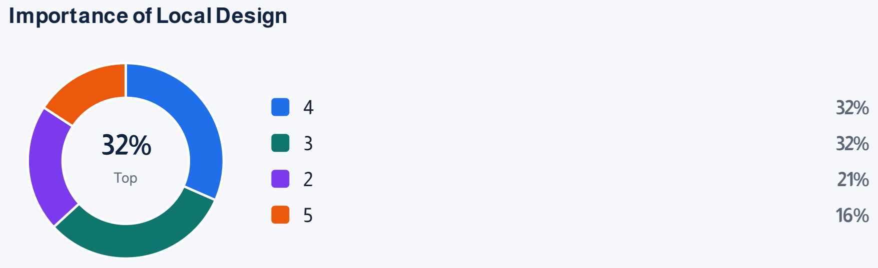




EXECUTIVE INSIGHT

While frictionless booking sets the baseline for convenience, a significant segment of travelers now connects deep-seated privacy needs directly with the appeal of localized heritage architecture. Among those who rate privacy as 'very important', 51 respondents (52% of this group) also rate local design as 'very important', with an additional 27 (27%) rating it as 'important'. This indicates that traditional design isn't merely an aesthetic preference; it's perceived as a functional vehicle for personal space and seclusion. Executives must understand that investing in local character only yields its full return when it inherently delivers on these fundamental privacy expectations, moving beyond surface-level cultural appeal to address a core guest desire.

STRATEGIC IMPLICATION

This finding directly impacts product development, marketing strategy, and investment priorities. Hotels must integrate privacy considerations into the core of their design process, ensuring localized architecture actively enhances seclusion. Marketing efforts should pivot to highlight how heritage elements deliver genuine personal space, strengthening the overall value proposition and attracting discerning guests.

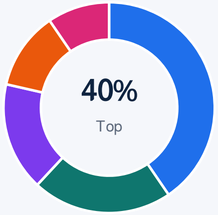
RECOMMENDED ACTIONS

1. Prioritize architectural designs for new builds and renovations that leverage traditional elements to create inherent privacy, such as secluded courtyards or distinct room separations.
2. Develop marketing narratives that explicitly connect localized design with enhanced personal space and tranquility, moving beyond generic cultural appreciation.
3. Evaluate existing property layouts and operational procedures to identify and amplify privacy-enhancing features, ensuring they are consistently delivered.

EXECUTIVE TAKEAWAY **Authentic design delivers commercial value when it inherently provides highly sought-after privacy.**

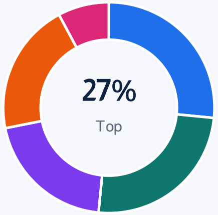
Willingness to pay for authentic local concepts hits a sharp ceiling at 5 percent premium

Suitable



Up to 5% extra	40%
6-10%	21%
No	17%
11-20%	12%
More than 20%	10%

Very suitable



Up to 5% extra	27%
More than 20%	25%
6-10%	20%
No	20%
11-20%	8%

EXECUTIVE INSIGHT

The sample splits on "More than 20%" by 15 points between Suitable and Very suitable — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

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RECOMMENDED ACTIONS

1. Split the Suitable and Very suitable messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY **The overall average describes a sample, not any actual customer inside it.**

05

Strategic Synthesis

Five core market realities reshaping Saudi hotel performance through 2026

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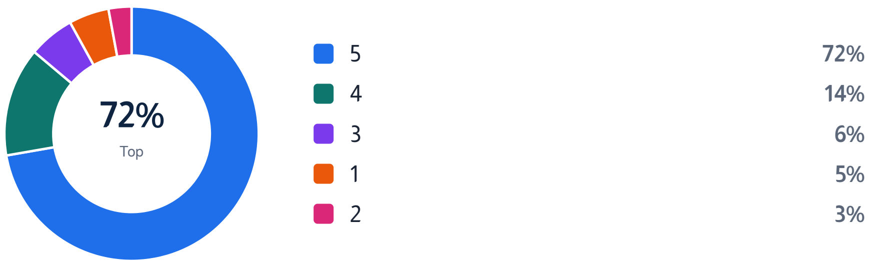
Please rate the importance of each of the following factors when choosing a hotel (1 = Not important at all, 5 = Very important). - Privacy



1

Privacy has become a mandatory structural expectation rather than a premium add-on, demanding privacy-first floor plans.

72% rated privacy as 5/5 in importance

n = 137

Five core market realities reshaping Saudi hotel performance through 2026

	ATTRIBUTE	RELATIVE IMPORTANCE	INDEX
1	Price	15.6%	156
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Dashed line = the average attribute (index 100). Above it is a genuine decision driver; below it is secondary.

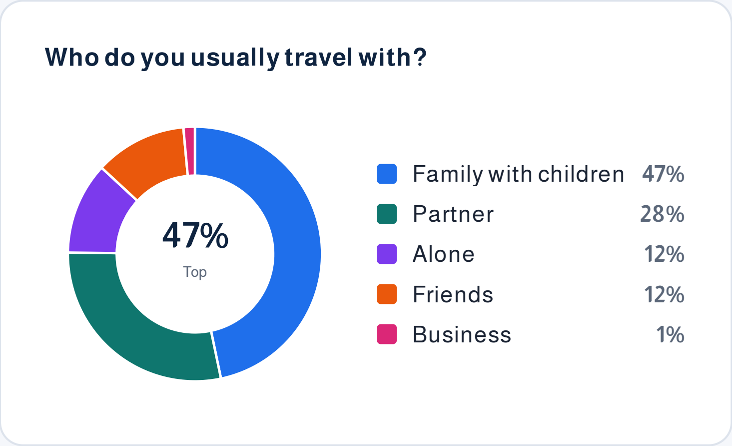
2

Forced-choice trade-offs confirm price and space dominate decisions, while eco-credentials hold minimal commercial weight.

Sustainability relative importance is 0.7%

n = 137

Five core market realities reshaping Saudi hotel performance through 2026



3

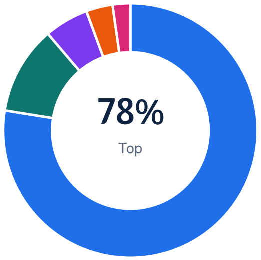
Family groups constitute the single primary volume driver across all hotel category tiers.

47% usually travel with family with children

n = 137

Five core market realities reshaping Saudi hotel performance through 2026

Please rate the importance of each of the following factors when choosing a hotel (1 = Not important at all, 5 = Very important). - Hotel suitability for families · 5



5	78%
4	11%
3	6%
1	3%
2	2%

4

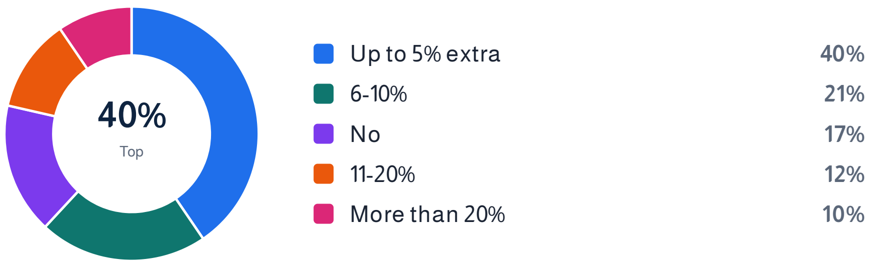
Flexible terms and family suitability function as a unified requirement for primary guest decision-makers.

78% rated both booking flexibility and family suitability 5/5

n = 137

Five core market realities reshaping Saudi hotel performance through 2026

Are you willing to pay a higher price for an authentic Saudi experience? · Suitable



5

Cultural experience pricing power is highly constrained, requiring strict discipline on authentic positioning surcharges.

40% willing to pay up to 5% extra for authentic Saudi experience

n = 137

06

Boardroom Recommendations

Commercial action plan for hospitality operators and developers

Commercial action plan for hospitality operators and developers

RECOMMENDATION 1

Elevate Core Expectations

Prioritise flawless execution of privacy (72% importance) and cleanliness (70% importance) as table stakes, as neglecting these erodes trust and actively deters guests, rather than winning new ones.

Linked to: Baseline hygiene and personal data security are no longer differentiators but fundamental requirements for guest acquisition.

RECOMMENDATION 2

Localised Luxury Appeal

Capitalise on the strong desire for authentic Saudi experiences (40% willing to pay more) by integrating local design (42% high importance) and cuisine (66% high importance) into luxury offerings, driving higher perceived value and booking likelihood.

Linked to: Authenticity is a premium product; guests are willing to pay for genuine cultural immersion.

RECOMMENDATION 3

Digital Convenience with a Human Touch

Deploy seamless digital services like mobile check-in (51%) and digital keys (50%), but mitigate privacy concerns (56%) and fear of losing human interaction (41%) by ensuring staff remain accessible for personalised service.

Linked to: Technology enhances convenience, but empathetic human service remains critical for guest satisfaction and trust.

RECOMMENDATION 4

Strategic Brand Investment

Leverage the 42% preference for Saudi brands when price and location are equal by highlighting trust in service quality (67%) and supporting national identity, while global brands must reinforce their value proposition beyond mere recognition.

Linked to: National brands can capture significant market share by focusing on service reliability and cultural resonance.

Thank you

This concludes the executive research report. We hope these insights support clearer decisions.

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