

23 April 2019

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
March 2019. Provisional data

Overnight stays in hotel establishments¹ decreased by 1.8% in March compared to the same month in 2018

Hotels invoice an average of 80.9 euros per occupied room, representing an annual decrease of 1.0%

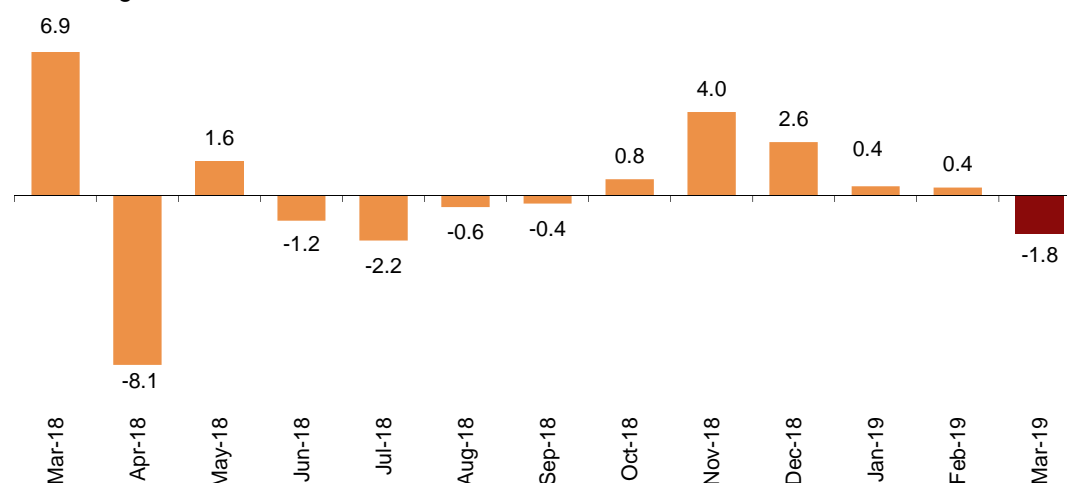
During the month of March overnight stays in hotel establishments exceeded 21.5 million, 1.8% less than in the same month of 2018. The overnight stays by travellers resident in Spain decreased by 4.9%, while those of non-residents increased by 0.3%.

The average stay decreased 2.0% as compared with March 2018, standing at 2.9 overnight stays per traveller.

During the first three months of 2019, overnight stays decreased by 0.5% compared to the same period of the previous year.

Annual variation rate for overnight stays

Percentage



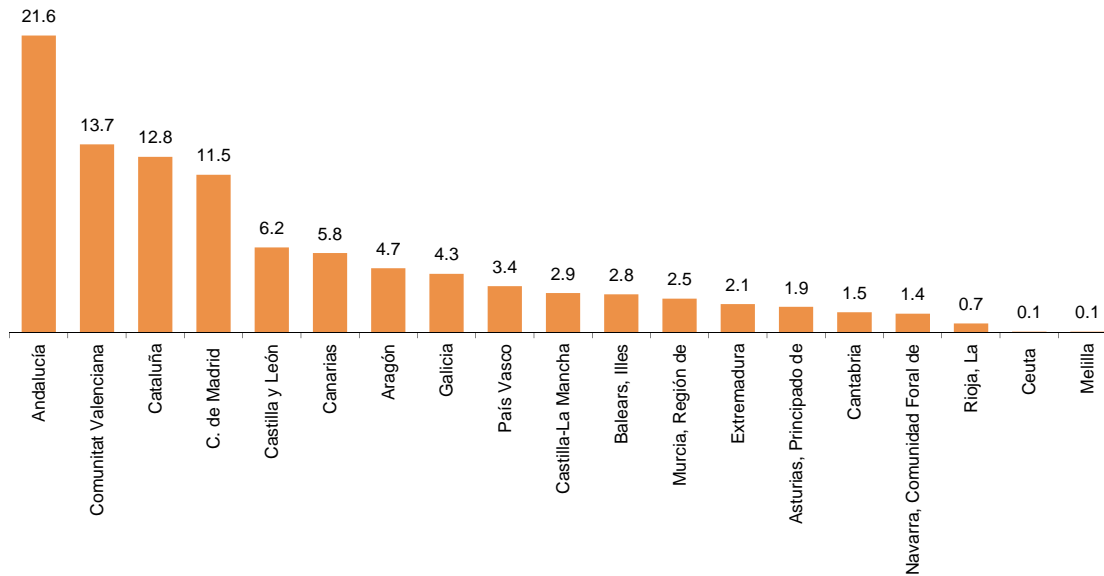
¹As Holy Week is celebrated in April in 2019, while it was celebrated between March and April in 2018, it is advisable to wait for next month's results for this survey in order to analyse both months together.

Destinations

Andalucía, Comunitat Valenciana and Cataluña were the main destinations of Spanish residents in March, with annual variation rates in the number of overnight stays of -0.9%, -4.6% and -9.4% respectively.

Distribution of overnight stays: residents

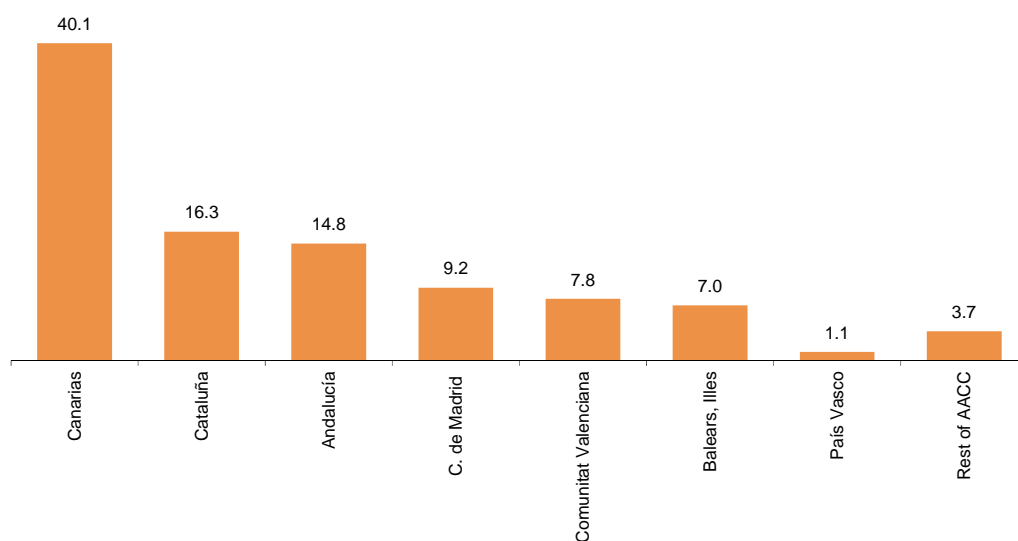
Percentage



The main destination chosen by non-residents was Canarias, with 40.1% of total overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 3.0% as compared to March 2018. The next most popular destinations of non-residents were Cataluña (with 16.3% of the total overnight stays and an increase of 1.7%) and Andalucía (with 14.8% of the total and an increase of 1.5%).

Distribution of overnight stays: non-residents

Percentage

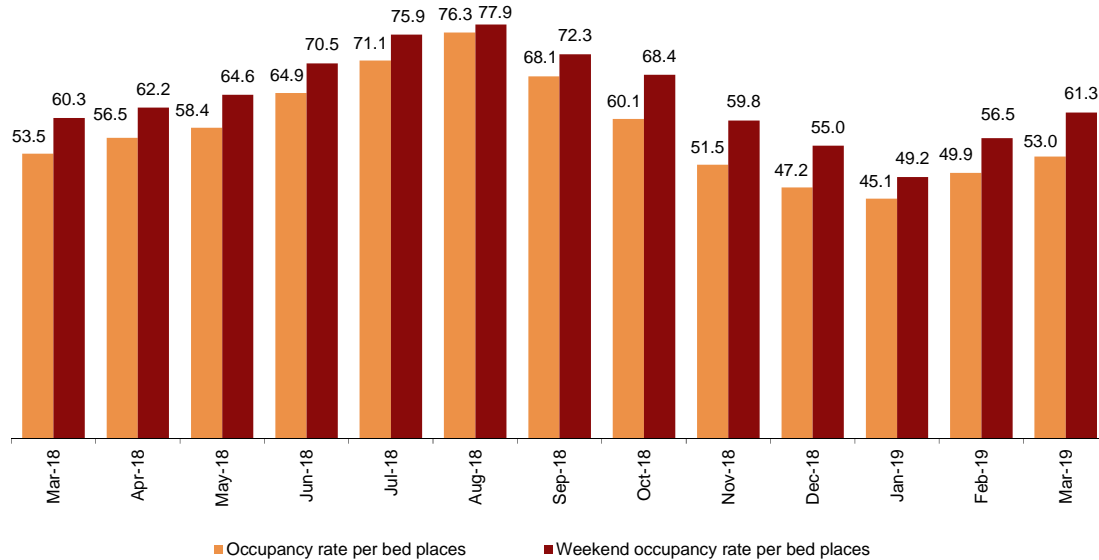


Hotel occupancy

In March, 53.0% of the places offered were covered, with an annual decrease of 1.0%. The weekend occupancy rate by bed-places increased 1.7%, standing at 61.3%.

Occupancy rate

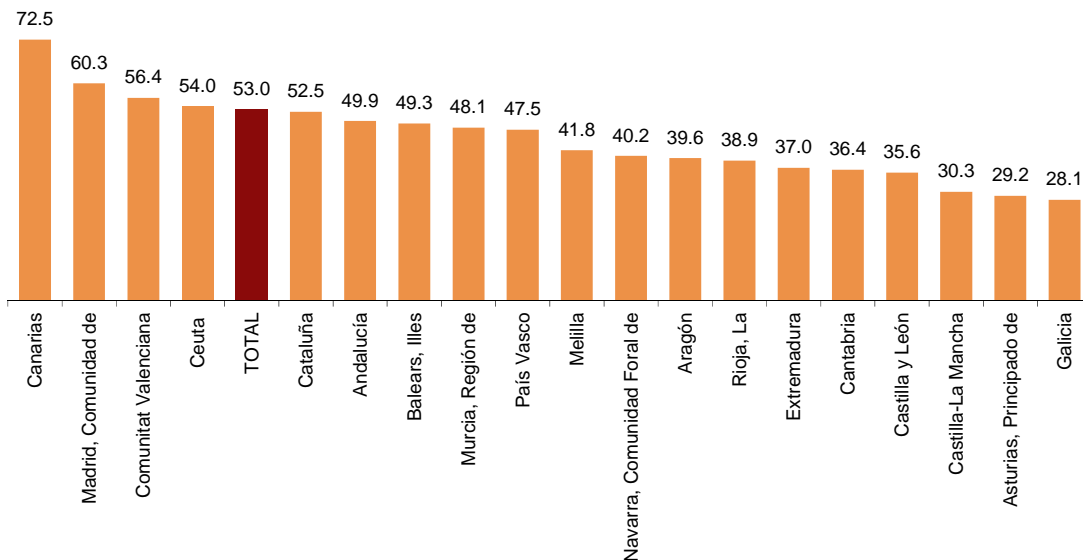
Percentage



Canarias registered the highest occupancy rate by bed-places in March (72.5%). It was followed by Comunidad de Madrid (60.3%) and Comunitat Valenciana (56.4%).

Occupancy rate per bed places by autonomous community

Percentage



By tourist areas, Lanzarote registered the highest occupancy rate by bedplaces (76.8%), and Sur de Tenerife registered the highest weekend occupancy rate (77.6%). The island of Tenerife registered the highest number of overnight stays, with 2.1 million.

The tourist sites with the most overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Arona had the highest occupancy rate by bedplaces (79.5%) and Sevilla registered the greatest weekend occupancy rate (84.4%).

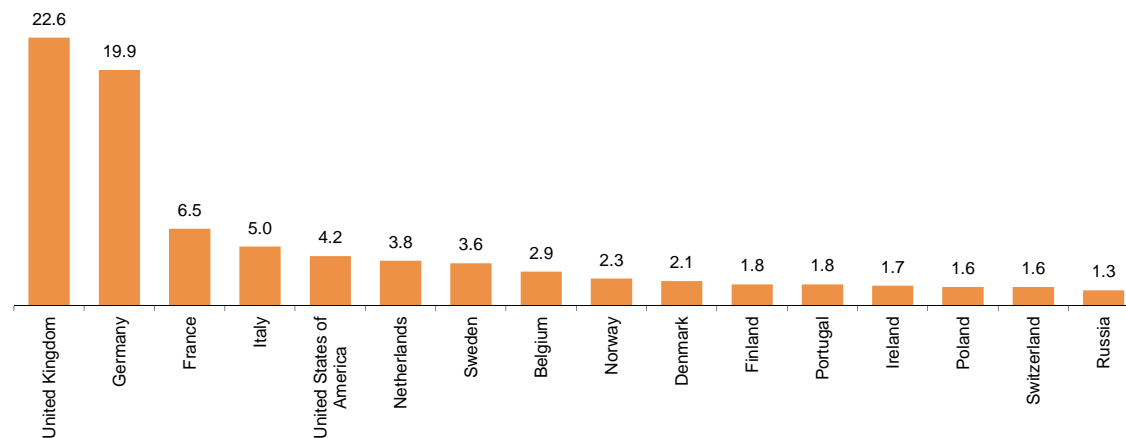
Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany accounted for 22.6% and 19.9%, respectively, of total overnight stays of non-residents in hotel establishments in March. The British market decreased by 1.5% and the German by 7.6%.

Overnight stays of travellers from France, Italy and the United States (the next greatest countries of origin) registered annual rates of 3.2%, 18.3% and 16.7% respectively.

Distribution of non-residents overnight stays. Main country of residence

Percentage

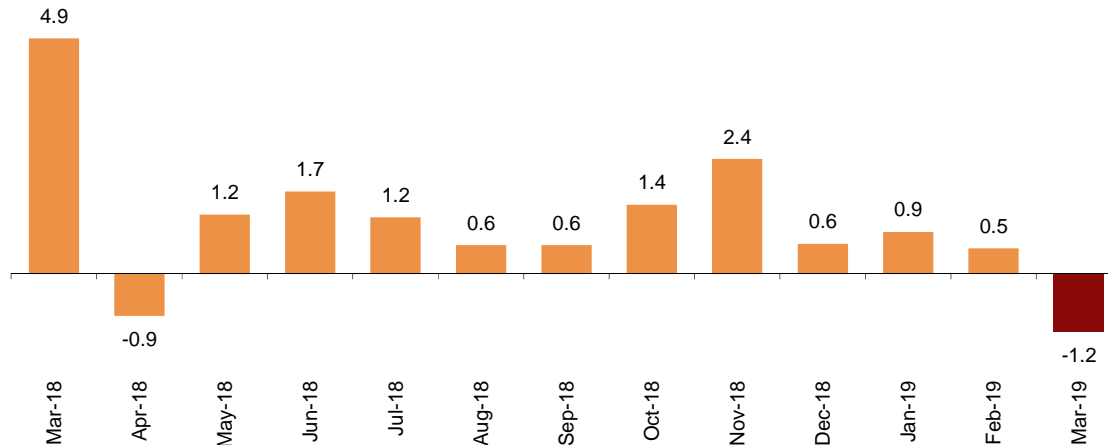


Hotel Prices

The annual rate of the Hotel Price Rate (in Spanish IPH) stood at -1.2% in March, which is 1.7 points lower than last month and 6.1 points lower than a year ago.

Hotel Prices Index

Annual variation rate. Percentage



By Autonomous Community, the greatest increases in the annual rate of hotel prices were in Cataluña (2.6%) and in Comunidad de Madrid (2.6%).

In contrast, the greatest decrease was recorded in Principado de Asturias, with a variation of -8.0% compared to March 2018.

By categories, the largest price increase took place in the three and two-silver star establishments (1.6%). And the greatest decrease in five-gold star establishments (-1.7%).

Profitability of the Hotel Sector

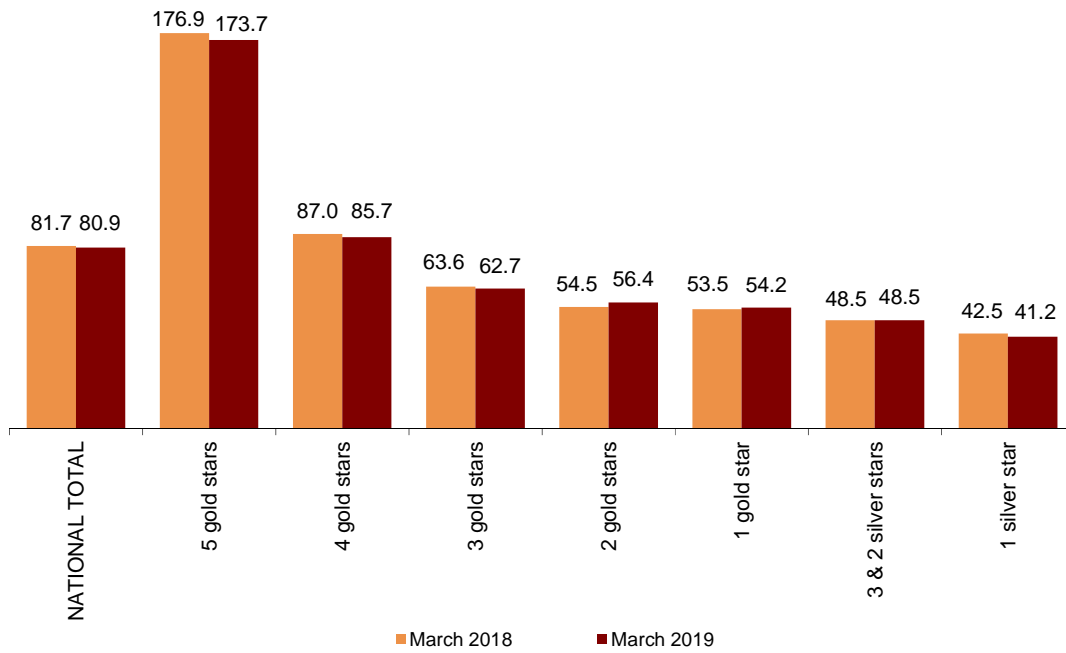
In March, hotels' average daily rate per occupied room (ADR) was 80.9 Euros, representing a decrease of 1.0% compared to the same month in 2018.

On the other hand, the average daily revenue per available room (RevPAR), which is determined by the occupancy registered in hotel establishments, reached 50.4 Euros, increasing by 1.2%.

By category, the average rate was 173.7 euros for five-star hotels, 85.7 euros for four-star hotels and 62.7 euros for three-star hotels. Revenues per available room for these same categories were 111.2, 61.1 and 40.9 euros respectively.

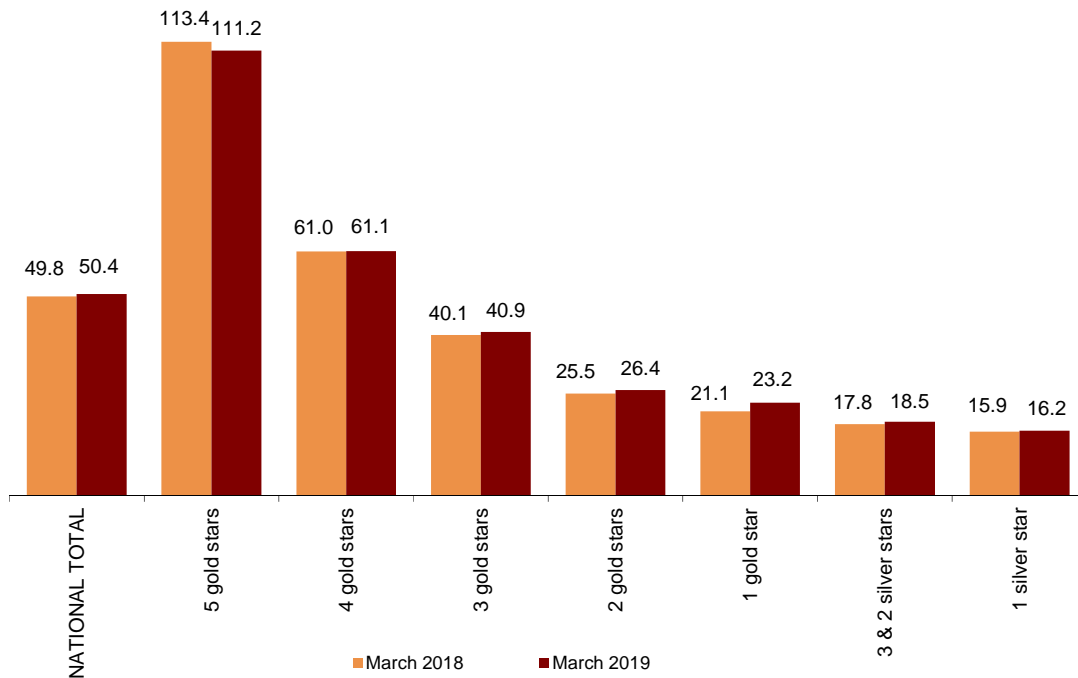
Average daily rate by hotel category

Euros



Revenue per available room by hotel category

Euros



Revision and updating of data

Coinciding with today's publication, the INE has updated the data corresponding to March 2018 in the Hotel Occupancy Survey (HOS), the Hotel Price Index (HPI) and the Indicators on the Profitability of the Hotel Sector (IPHS).

Methodological note

The main objective of the Hotel Occupancy Survey (HOS) is to ascertain the behaviour of a series of variables that make it possible to describe the fundamental characteristics of the hotel sector, both from the point of view of supply and demand, and thus meet the need for knowledge of the sector by national institutions and the requirements of international organisations.

The Hotel Price Index (HPI) is a statistical measure of the monthly evolution of the prices that hotel entrepreneurs apply to their clients.

The main objective of the Indicators of Profitability of the Hotel Sector (IRSH) is to facilitate decision making in the hotel sector. These are the *Average Daily Rate* (ADR), which collects the average daily income per occupied room; and the *Revenue per Available Room* (RevPAR), which collects the average daily revenue per available room.

Type of operation: monthly continuous survey.

Population scope: all hotel establishments.

Geographical scope: the entire national territory.

Reference period of the results: the month.

Reference period of the information: seven consecutive days of each month, chosen randomly in such a way that all the establishments cover the whole month.

Sample design: stratified sampling by province and category of the establishment, being comprehensive those strata of 4 and 5 gold star categories.

Sample size: approximately 9,250 establishments in winter and 11,200 in summer.

Collection method: questionnaire filled in directly by the hotel establishment.

For more information on these statistical operations, you can consult the [methodology and the standardised methodological report](#) for each of them in INEbase.

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Press office: Telephone numbers: (+34) 91 583 93 63 /94 08 – gprensa@ine.es

Information Area: Telephone number: (+34) 91 583 91 00 – www.ine.es/infoine/?L=1
