

23 April 2020

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
March 2020. Provisional data

Overnight stays in hotel establishments¹ decreased by 61.1% in March compared to the same month in 2019

Hotels take in an average of 29.7 euros per occupied room, representing an annual decrease of 41.0%

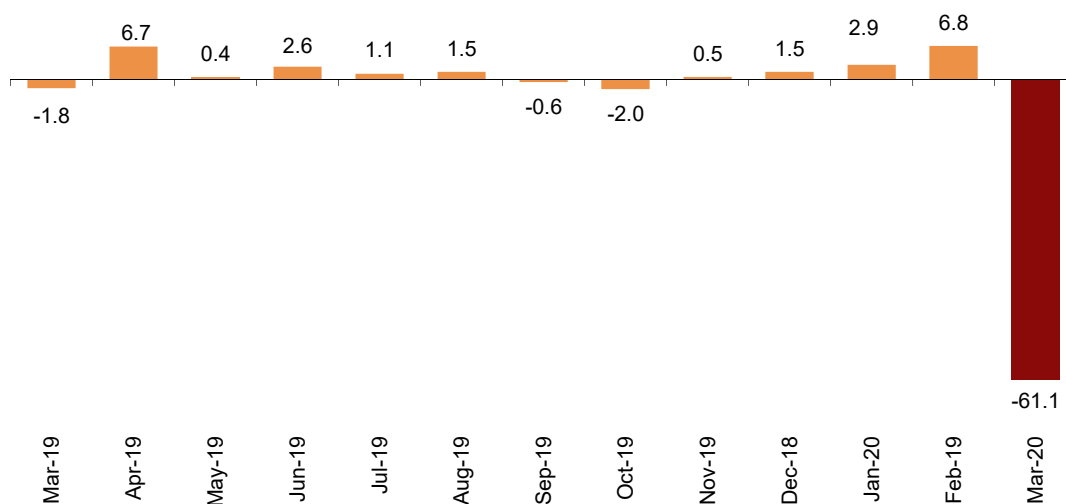
During the month of March, overnight stays in hotel establishments exceeded 8.3 million, 61.1% less than in the same month of 2019. Overnight stays of residents in Spain decreased by 64.6% and those of non-residents by 58.9%.

The average stay increased 11.5% as compared with March 2019, standing at 3.2 overnight stays per traveller.

During the first three months of 2020, overnight stays decreased by 21.6% as compared with the same period of the previous year.

Annual variation rate for overnight stays

Percentage



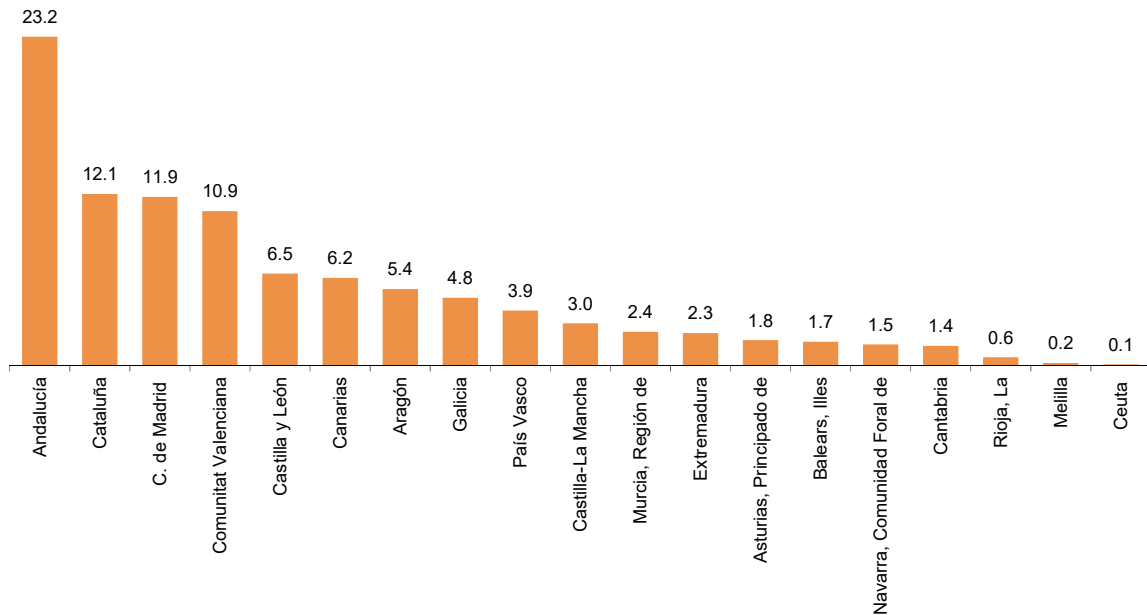
¹ An informative annex is included at the end of this press release on how the COVID-19 crisis has affected hotel establishments and the carrying out of this statistical operation.

Destinations

Andalucía, Cataluña, and Comunidad de Madrid were the main destinations of residents in Spain in March, with annual variation rates in the number of overnight stays of -62.2%, -66.2% and -63.4%, respectively.

Distribution of overnight stays: residents

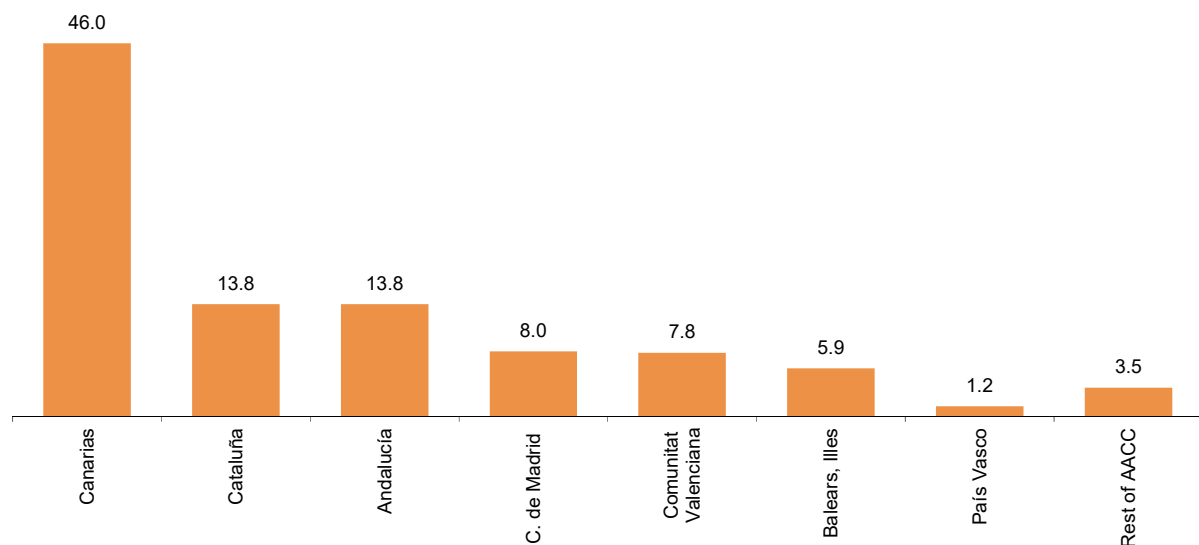
Percentage



The main destination chosen by non-residents was Canarias, with 46.0% of total overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 52.7% as compared to March 2019. The next most popular destinations of non-residents were Cataluña (with 13.8% of the total overnight stays and an decrease of 65.2%) and Andalucía (with 13.8% of the total and a decrease of 61.4%).

Distribution of overnight stays: non-residents

Percentage

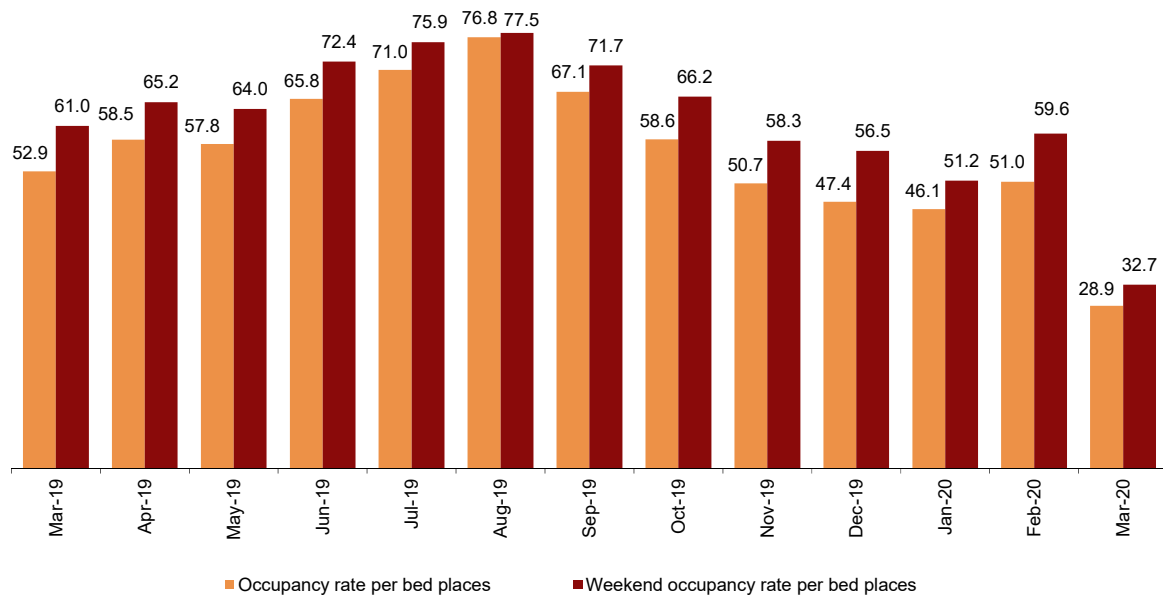


Hotel occupancy

In March, 28.9% of the places offered were covered, with an annual decrease of 45.3%. The level of occupancy by places at the weekend declines by 46.4% and stands at 32.7%.

Occupancy rate

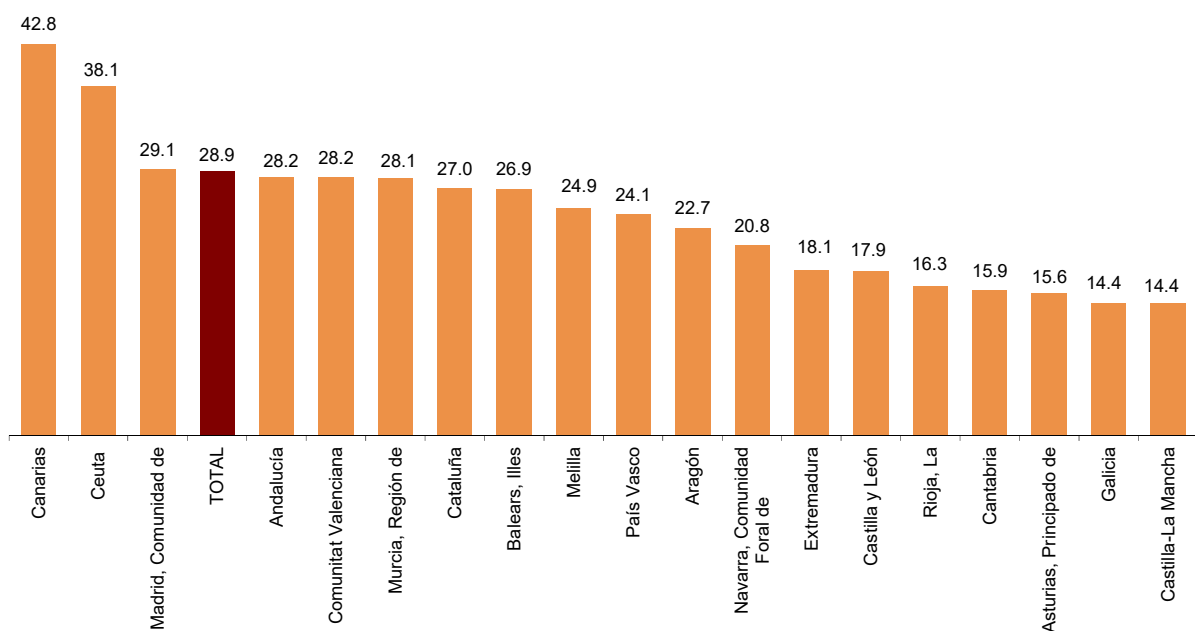
Percentage



Canarias registered the highest occupancy rate by bed-places in March (42.8%). It was followed by Ceuta (38.1%) and Comunidad de Madrid (29.1%).

Occupancy rate per bed-places by Autonomous Community

Percentage



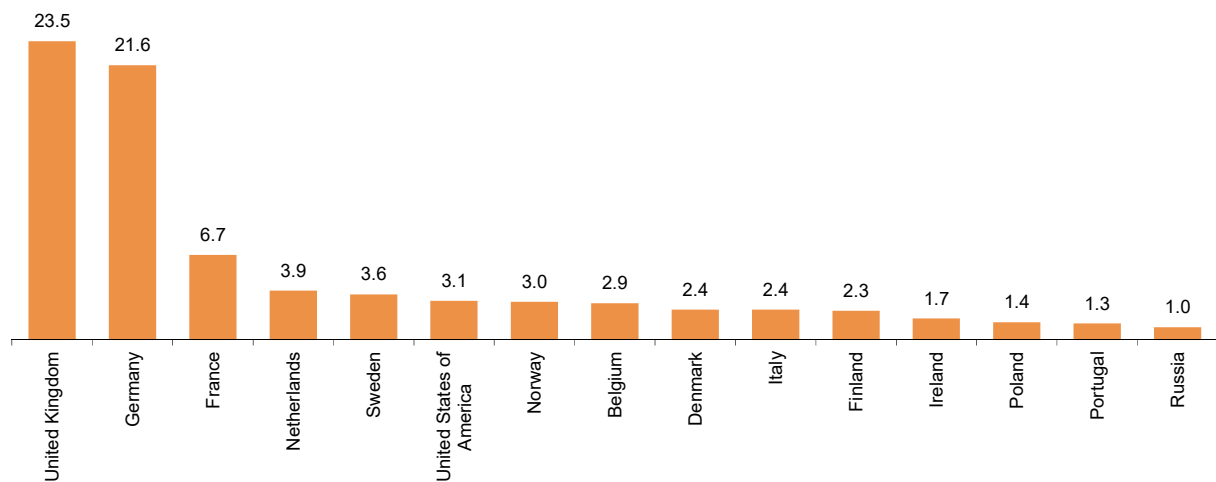
Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany accounted for 23.5% and 21.6%, respectively, of total overnight stays of non-residents in hotel establishments in March. The British market had an annual variation rate of -57.3%, and the German market a rate of -54.9%.

Overnight stays of travellers from France, the Netherlands, and Sweden (the following countries of origin) registered annual rates of -57.3%, -57.5% and -59.2% respectively.

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

Percentage

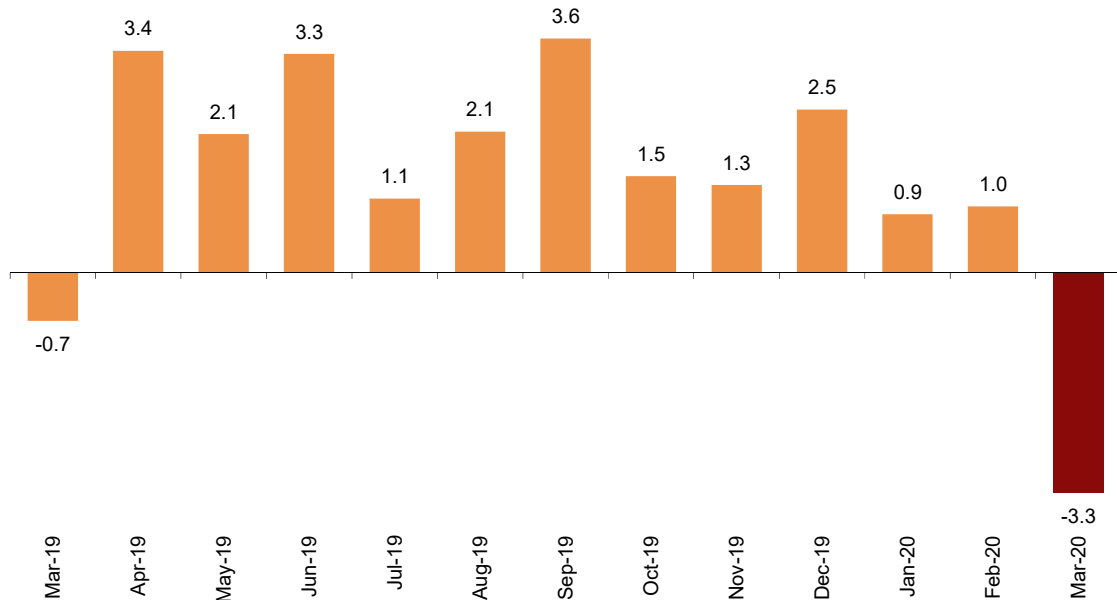


Hotel Prices

The annual rate of the Hotel Price Rate (in Spanish IPH) stood at -3.3% in March, which is 4.3 points lower than last month and 2.6 points lower than a year ago.

Hotel Prices Index

Annual variation rate. Percentage



By Autonomous Community, the greatest increases in hotel prices were recorded in Foral de Navarra (7.4% in annual rate).

By categories, the greatest price increase was registered in one-gold star establishments (2.1%).

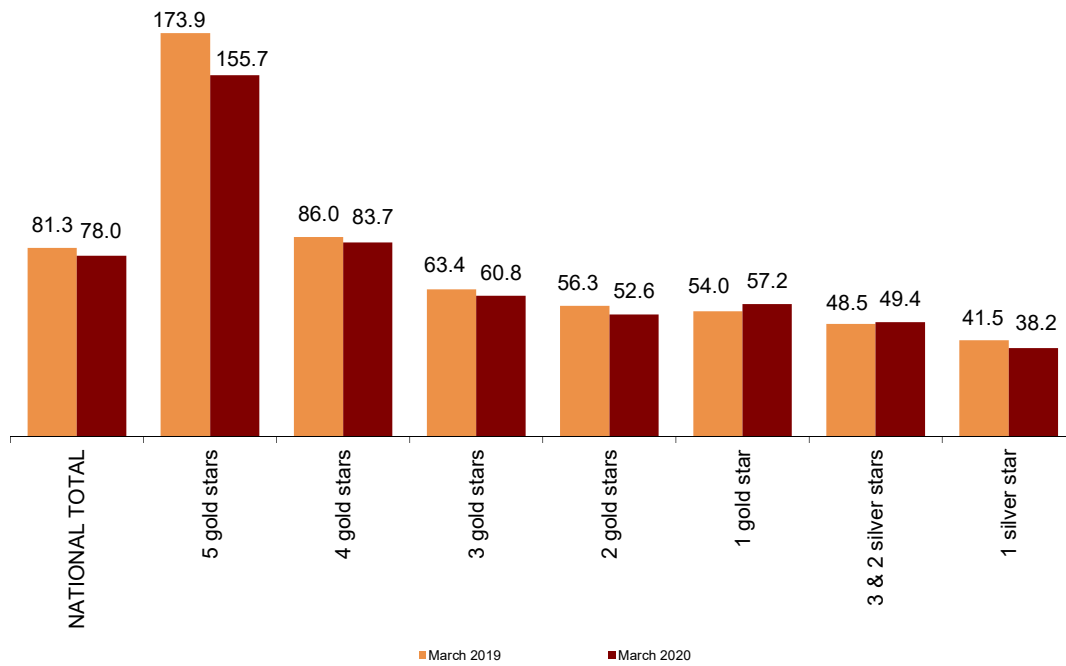
Profitability of the Hotel Sector

In March, hotels' average daily rate per occupied room (ADR) was 78.0 Euros, representing a decrease of 4.2% compared to the same month in 2019.

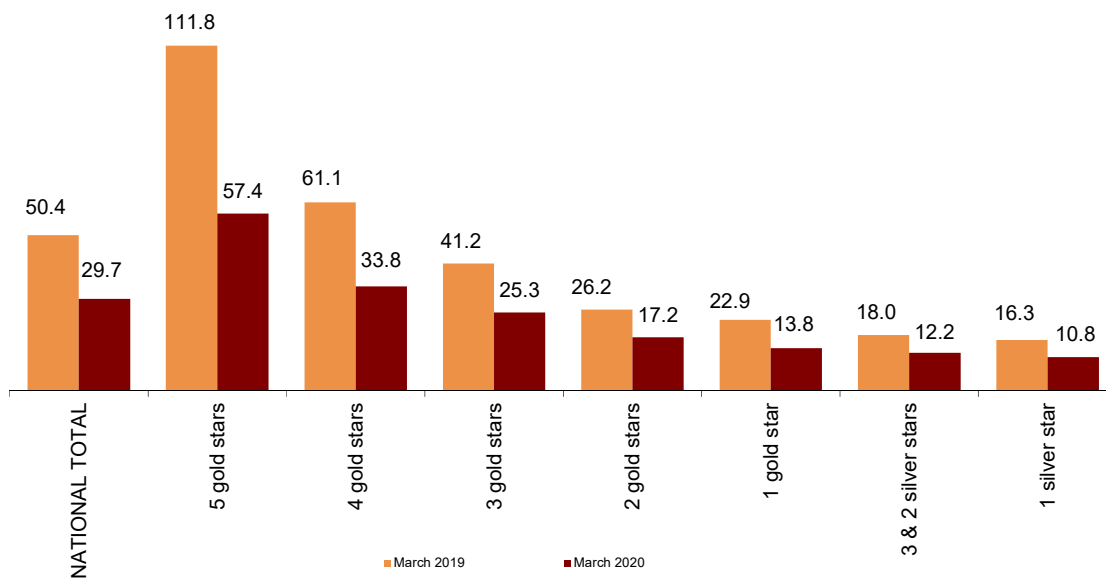
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 29.7 euros, with a 41.0% decrease.

By category, the average rate was 155.7 euros for five-star hotels, 83.7 euros for four-star hotels and 60.8 euros for three-star hotels. Revenues per available room for these same categories were 57.4, 33.8, and 25.3 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 2019 in the Hotel Occupancy Survey (HOS), the Hotel Price Index (HPI) and the Indicators on the Profitability of the Hotel Sector (IPHS).

Note regarding COVID-19's impact on the statistical operation of the Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)

The entry into force of Order SND/257/2020 of **March 19**, which declares the suspension of the normal operation of tourist accommodation establishments in accordance with article 10.6 of Royal Decree 463/2020, of March 14, which declares the high alert period for the management of the health crisis situation caused by COVID-1, in its first section establishes the **suspension of the normal operation of all hotels** and tourist accommodation and other short-stay accommodations, campsites, RV parks and other similar establishments, located anywhere in the national territory.

However, the third section establishes that this closure will take place at the moment in which the establishment no longer has clientèle and, in any case, within a maximum period of seven calendar days from the entry into force of this rule.

Thus, as of March 19, hotel establishments were progressively closed, and their activity was suspended entirely on March 26².

This situation creates an unprecedented problem in terms of data collection for the Hotel Occupancy Survey.

As usual, most of the information collection process for statistical operation took place during the first fortnight of the month following the reference month. In this case, this was April, when establishments were already closed to the public and, generally speaking, were not offering the services for which statistical information would be requested. This, together with the difficulty of contacting some establishments due to closure, has particularly compromised the collection of information this month, and a reduction in the response rate has been observed.

As such, the lack of response in March was 24.3% (compared to 6.3% in February), to which a 38.3% hotel closure rate must be added (compared to 12.3% the previous month). The allocation methods for the lack of response for the calculation of the final estimators have been those generally used in this statistical operation.

The variation coefficients for the variable number of overnight stays, nationwide, have increased from 0.4 in February 2020 to 1.6 this month. Similarly, they have also increased at the autonomous community level. In February they were between 0.3 and 5.7 and in March between 2.8 and 18.7. While these indicators show a reduction in the quality of the estimated data compared to a normal month, the INE believes that **the data at the national level and by Autonomous Community is of sufficient quality for its dissemination** and use by different users of statistics.

²Although there are establishments with opening permits (order TMA/227/2020 of March 23 and order TMA/305/2020 of March 30), their activity is not considered to be tourism-related, meaning that they are not objects of study for the Hotel Occupancy Survey

This does not happen with the information at the provincial and/or zonal and tourist point level, common in this statistic's publication, which according to the INE, fails to meet the minimum quality standard for dissemination.

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: on-going monthly survey.

Population scope: all hotel establishments.

Geographical scope: the entire national territory.

Reference period for the results: monthly.

Reference period of the information: seven consecutive days of each month, chosen randomly in such 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.

For further information see **INEbase:** www.ine.es/en/ Twitter: [@es_ine](https://twitter.com/es_ine)

All press releases at: www.ine.es/en/prensa/prensa_en.htm

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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

March 2020

Provisional Data

23rd April 2020

1. Guests, overnight stays and average stay by category of establishment

Category	Number of guests			Number of overnight stays			Average stay
	Total	Residents in Spain	Residents abroad	Total	Residents in Spain	Residents abroad	
TOTAL	2,628,654	1,434,190	1,194,464	8,369,465	3,005,027	5,364,438	3.18
HOTELS: Golden stars							
Five	149,670	44,680	104,990	585,929	92,918	493,011	3.91
Four	1,135,140	564,381	570,760	3,964,377	1,192,689	2,771,687	3.49
Three	584,860	335,505	249,355	1,841,694	711,656	1,130,038	3.15
Two	314,808	196,366	118,442	770,070	372,295	397,776	2.45
One	117,370	73,119	44,251	251,023	136,444	114,579	2.14
INNS: Silver stars							
Two and three	188,113	131,961	56,153	460,062	260,244	199,818	2.45
One	138,692	88,179	50,513	496,310	238,781	257,529	3.58
Annual rate	-65.11	-64.45	-65.88	-61.11	-64.57	-58.86	11.47
Cumulative annual rate	-21.92	-20.74	-23.29	-21.59	-22.84	-20.83	0.42

2. Open establishments, capacity, occupancy and employed personnel by category of establishment

Category	Estimated open establishments	Estimated bedrooms	Estimated bed-places	Occupancy rate			Employed personnel
				Of bed-places	Of bed-places at weekend	Of bedrooms	
TOTAL	10,768	449,303	930,203	28.92	32.69	34.67	123,711
HOTELS: Golden stars							
Five	198	31,320	66,820	28.22	33.24	32.39	18,326
Four	1,384	189,606	405,401	31.43	35.61	38.12	62,231
Three	1,192	88,378	188,773	31.29	37.00	37.64	22,626
Two	1,553	44,834	88,616	27.96	29.87	33.35	8,163
One	968	21,097	41,635	19.43	18.82	23.82	2,902
INNS: Silver stars							
Two and three	2,574	39,135	74,573	19.86	22.38	25.44	5,503
One	2,898	34,932	64,386	24.84	25.82	29.08	3,960
Annual rate	-22.01	-28.41	-28.53	-45.28	-46.39	-44.34	-30.94

3. Guests, overnight stays and average stay

Results by Autonomous City and Community

	Number of guests			Overnight stays			Average stay
	Total	Residents in Spain	Residents abroad	Total	Residents in Spain	Residents abroad	
TOTAL	2,628,654	1,434,190	1,194,464	8,369,465	3,005,027	5,364,438	3.18
Andalucía	569,757	328,214	241,543	1,435,107	696,026	739,081	2.52
Aragón	96,947	81,923	15,024	201,359	163,533	37,826	2.08
Asturias, Principado de	33,035	29,656	3,379	63,601	55,005	8,596	1.93
Balears, Illes	75,406	22,074	53,332	364,430	50,536	313,895	4.83
Canarias	345,158	54,615	290,543	2,656,642	187,612	2,469,030	7.70
Cantabria	29,890	24,308	5,582	51,340	42,383	8,957	1.72
Castilla y León	117,954	100,356	17,598	232,869	195,483	37,386	1.97
Castilla-La Mancha	62,264	54,377	7,887	106,653	90,475	16,178	1.71
Cataluña	428,357	176,096	252,261	1,101,240	362,131	739,109	2.57
Comunitat Valenciana	223,341	124,204	99,136	746,116	326,082	420,034	3.34
Extremadura	46,564	40,221	6,343	77,944	67,927	10,018	1.67
Galicia	89,494	73,796	15,699	179,708	145,139	34,569	2.01
Madrid, Comunidad de	337,397	195,636	141,761	789,940	358,622	431,318	2.34
Murcia, Región de	42,526	34,195	8,332	93,679	73,585	20,094	2.20
Navarra, Comunidad Foral de	29,166	24,426	4,740	54,125	45,359	8,766	1.86
País Vasco	85,676	57,429	28,247	181,894	118,236	63,657	2.12
Rioja, La	11,333	9,708	1,625	21,247	18,305	2,942	1.87
Ceuta	2,420	1,374	1,046	6,174	3,901	2,273	2.55
Melilla	1,969	1,582	386	5,396	4,686	710	2.74

HOS (TABLES ANNEXO) -March 2019. Provisional data (2/4)

4. Establishment, capacity, occupancy and employed personnel

Results by Autonomous City and Community

	Estimated open establishments	Estimated bedrooms	Estimated bed-places	Occupancy rate			Employed personnel
				Of bed-places	Of bed-places at weekend	Of bedrooms	
TOTAL	10,768	449,303	930,203	28.92	32.69	34.67	123,711
Andalucía	1,685	75,903	163,418	28.24	32.34	34.78	19,508
Aragón	622	14,280	28,269	22.73	27.69	27.26	2,517
Asturias, Principado de	336	6,807	13,146	15.59	18.78	19.85	1,314
Balears, Illes	225	20,551	43,666	26.88	35.91	35.40	7,136
Canarias	477	87,088	199,180	42.81	46.39	50.69	37,376
Cantabria	241	5,337	10,372	15.87	17.77	18.33	1,229
Castilla y León	985	22,163	41,744	17.94	24.61	22.45	4,591
Castilla-La Mancha	574	12,350	23,846	14.41	17.31	18.67	2,186
Cataluña	1,626	64,424	131,305	26.98	31.30	32.13	16,821
Comunitat Valenciana	726	41,190	85,090	28.21	32.20	33.64	9,418
Extremadura	327	7,214	13,865	18.09	20.02	21.78	1,825
Galicia	1,039	21,758	40,100	14.43	14.78	19.28	3,838
Madrid, Comunidad de	987	44,902	87,503	29.08	30.29	36.32	9,782
Murcia, Región de	126	5,629	10,746	28.07	27.29	34.27	1,254
Navarra, Comunidad Foral de	191	4,232	8,369	20.77	26.81	28.66	1,057
País Vasco	489	12,674	24,174	24.14	26.25	31.49	3,070
Rioja, La	92	2,154	4,188	16.34	24.69	20.44	485
Ceuta	11	278	521	38.14	27.05	41.71	179
Melilla	9	371	700	24.86	26.26	36.11	123

HOS (TABLES ANNEXO) -March 2019. Provisional data (3/4)

5. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	2,628,654	100.00	8,369,465	100.00
Residents in Spain	1,434,190	54.56	3,005,027	35.90
Residents abroad	1,194,464	45.44	5,364,438	64.10
Total Residents abroad	1,194,464	100.00	5,364,438	100.00
TOTAL Residents in EU-271 (without Spain)	604,442	50.60	2,870,026	53.50
- Germany	178,340	14.93	1,158,011	21.59
- Austria	11,537	0.97	49,712	0.93
- Belgium	31,032	2.60	154,825	2.89
- Denmark	20,107	1.68	130,674	2.44
- Finland	17,891	1.50	120,433	2.25
- France	119,579	10.01	356,864	6.65
- Greece	3,679	0.31	13,241	0.25
- Ireland	21,042	1.76	91,878	1.71
- Italy	40,574	3.40	129,355	2.41
- Luxembourg	2,206	0.18	12,522	0.23
- Netherlands	48,738	4.08	210,898	3.93
- Poland	17,176	1.44	74,606	1.39
- Portugal	30,161	2.53	67,141	1.25
- Czech Republic	3,819	0.32	13,695	0.26
- Sweden	29,512	2.47	195,211	3.64
-Other EU-27 countries ²	29,048	2.43	90,961	1.70
Norway	18,879	1.58	161,705	3.01
United Kingdom	221,044	18.51	1,257,808	23.45
Russia	17,416	1.46	51,113	0.95
Switzerland	18,286	1.53	69,503	1.30
Rest of Europe	38,052	3.19	116,931	2.18
Japan	24,066	2.01	51,024	0.95
United States of America	66,255	5.55	163,844	3.05
Rest of America	102,558	8.59	356,836	6.65
Africa	23,040	1.93	111,779	2.08
Other countries	60,425	5.06	153,868	2.87

¹ Since 31 January 2020, The United Kingdom is no longer part of the E.U., hence the aggregate UE-27 is published.

² Countries included in Other UE-27 countries: Bulgaria, Cyprus, Croatia, Slovakia, Slovenia, Estonia, Hungary, Latvia, Lithuania, Malta and Romania

Hotel Price Index (HPI). 2008 Base March 2020

Provisional data

1. National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	99.39	-3.33
Andalucía	92.98	-3.47
Aragón	81.64	-0.95
Asturias, Principado de	78.41	-4.79
Balears, Illes	106.32	-6.69
Canarias	127.79	-0.97
Cantabria	84.30	-1.92
Castilla y León	91.37	3.51
Castilla - La Mancha	88.50	-1.11
Cataluña	87.69	-5.88
Comunitat Valenciana	97.00	-3.67
Extremadura	87.20	-2.42
Galicia	88.71	-2.77
Madrid, Comunidad de	84.35	-5.77
Murcia, Región de	78.58	-4.67
Navarra, Comunidad Foral de	90.10	7.43
País Vasco	86.18	-3.73
Rioja, La	89.82	6.45
Ceuta	87.70	1.58
Melilla	101.18	0.10

2. National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	99.39	-3.33
HOTELS: Gold stars		
Five	86.33	-5.13
Fourth	101.17	-2.90
Three	101.19	-4.97
Two	98.78	1.04
One	106.87	2.11
HOSTALS: Silver stars		
Three and two	98.56	-0.79
One	109.65	-1.93

Indicators on the Profitability of the Hotel Sector March 2020

Provisional data

National ADR and RevPAR¹ and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	77.95	-4.17	29.73	-40.98
Andalucía	63.93	-7.93	23.86	-43.02
Aragón	60.81	-0.82	17.48	-38.18
Asturias, Principado de	51.52	-1.96	10.29	-45.37
Balears, Illes	72.25	0.93	32.18	-23.62
Canarias	104.37	0.07	56.72	-35.13
Cantabria	56.96	-4.78	13.49	-44.39
Castilla y León	56.58	5.31	14.91	-31.04
Castilla - La Mancha	53.22	-2.31	11.16	-43.75
Cataluña	82.22	-11.98	29.34	-49.17
Comunitat Valenciana	54.97	-11.57	19.64	-50.80
Extremadura	55.08	-2.12	13.85	-43.17
Galicia	49.48	-5.97	10.44	-41.15
Madrid, Comunidad de	75.86	-16.69	27.52	-59.46
Murcia, Región de	51.04	-8.57	15.73	-49.17
Navarra, Comunidad Foral de	59.20	-4.86	18.31	-41.28
País Vasco	65.91	-9.00	21.99	-48.82
Rioja, La	70.01	9.53	19.60	-32.92
Ceuta	57.41	-17.40	20.39	-46.44
Melilla	73.85	4.79	28.89	-34.19

¹ ADR: Average Daily Rate

RevPAR: Revenue per Available Room

National ADR and RevPar¹ and breakdown by categories

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	77.95	-4.17	29.73	-40.98
HOTELS: Gold stars				
Five	155.71	-10.45	57.44	-48.64
Four	83.65	-2.78	33.81	-44.63
Three	60.75	-4.14	25.27	-38.59
Two	52.64	-6.57	17.21	-34.30
One	57.17	5.96	13.78	-39.76
GUESTHOUSES: Silver stars				
Three and two	49.37	1.79	12.24	-31.83
One	38.18	-8.08	10.84	-33.55

RevPAR: Revenue per Available Room