

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
March 2021. Provisional data

Overnight stays in hotel establishments decrease 57.9% in March with respect to the same month in 2020

Hotels invoice an average of 65.5 euros per occupied room, representing an annual decrease of 16.2%

During the month of March, overnight stays in hotel establishments exceeded 3.5 million, 57.9% less than in the same month of 2020.

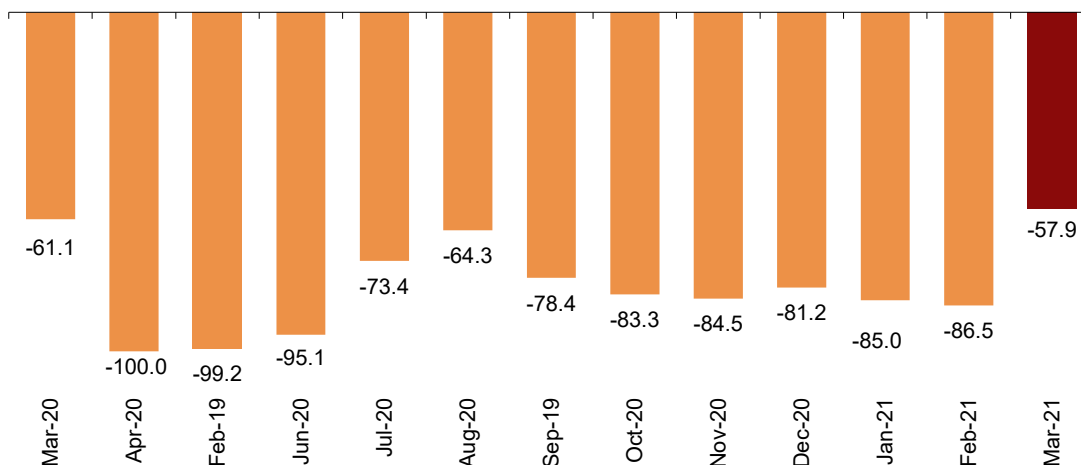
Compared with levels prior to the pandemic, overnight stays in hotel establishments in March 2021, showed a decrease of 83.6% compared to March 2019.

On the basis of origin, overnight stays by travellers residing in Spain, which represent 72.5% of the total, decreased by 17.2% in the annual rate. In turn, overnight stays by non-residents fell by 81.7%.

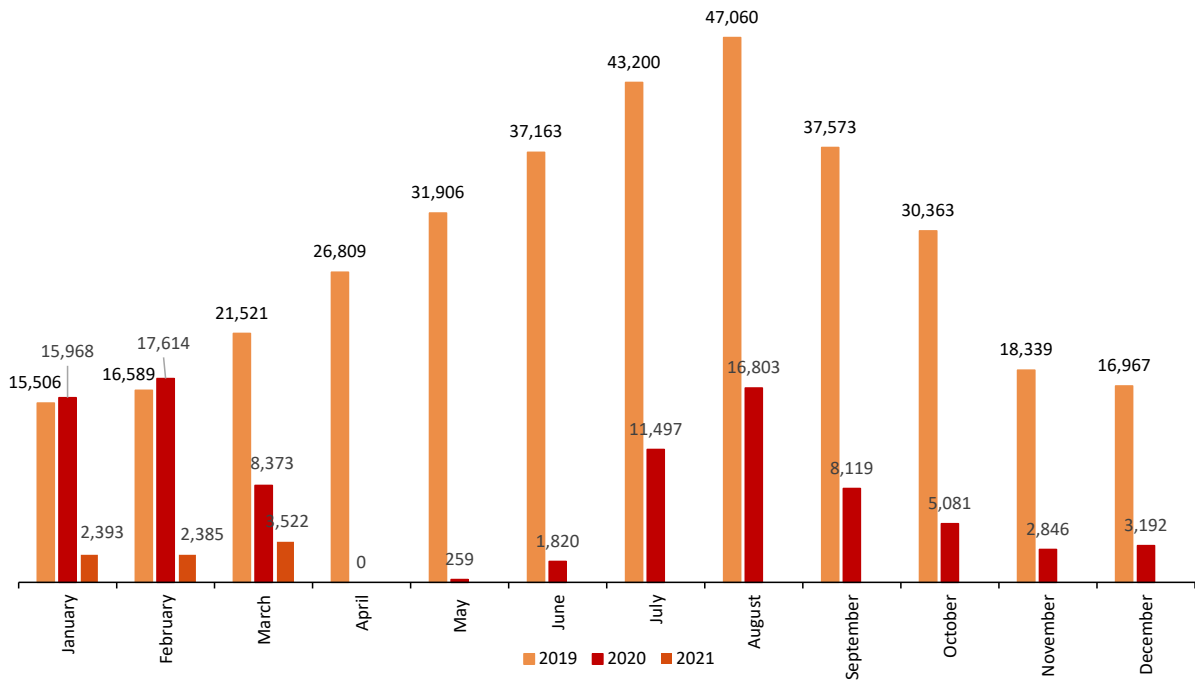
On the other hand, the average stay decreased 35.6% compared to March 2020, standing at 2.0 overnight stays per traveller.

Annual variation rate for overnight stays

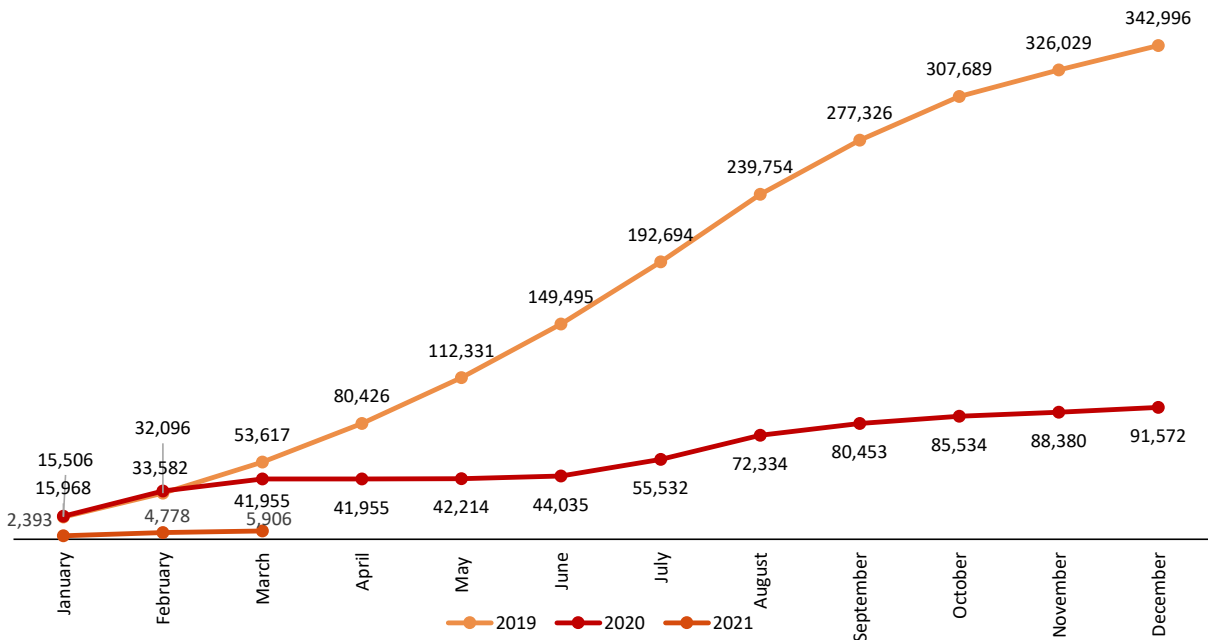
Percentage



Overnight stays. Comparison 2019-2020-2021
Thousands



Cumulative overnights. Comparison 2019-2020-2021
Thousands



Open establishments

In March, a total of 8,416 hotels were open in Spain, 22.0% less than in the same month of 2020. This represented 49.3% of the total directory of establishments in this month.

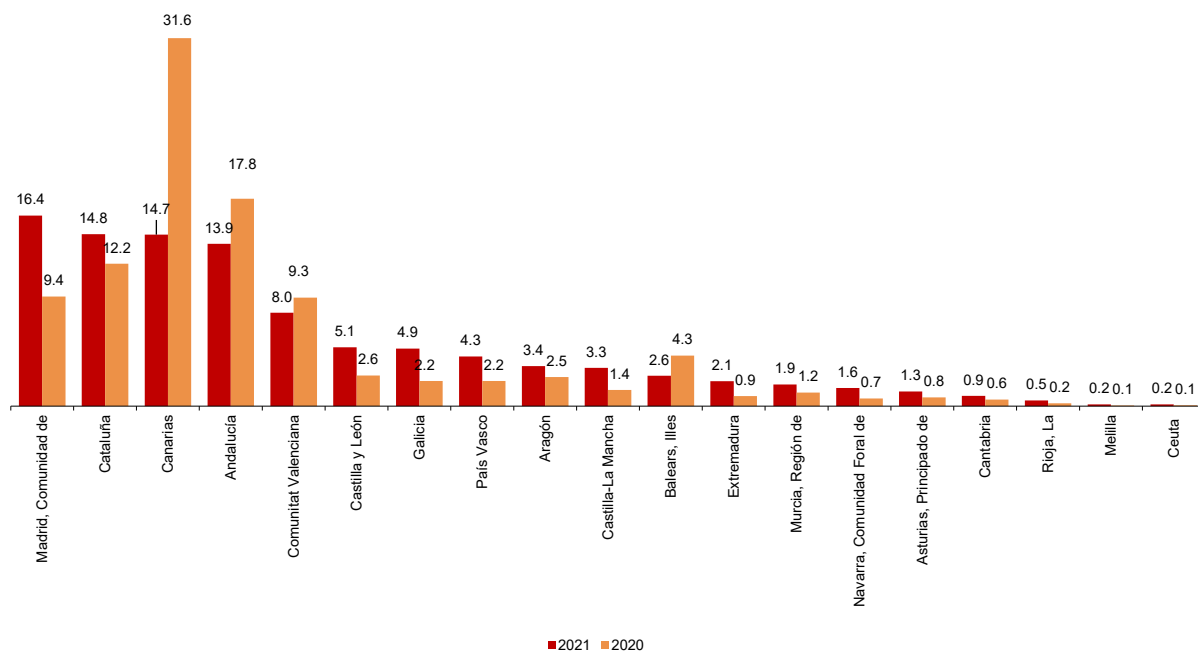
Category	Estimated open establishments total	Percentage of directory	Estimated bedrooms	Percentage of directory total	Estimated bed-places	Percentage of directory total
TOTAL	8,416	49.3	289,703	40.1	586,610	39.1
HOTELS: Golden stars						
Five	130	38.3	21,851	43.9	46,101	43.7
Four	1,017	41.3	109,993	34.5	230,041	33.5
Three	1,066	41.4	55,946	34.0	116,317	33.4
Two	1,066	49.8	28,184	48.3	55,391	48.4
One	669	51.9	15,723	57.9	31,129	58.5
INNS: Silver stars						
Two and three	1,968	56.7	28,731	57.4	53,927	56.9
One	2,501	52.1	29,276	54.5	53,702	55.0
Annual rate	-22.0		-34.8		-36.3	

Destinations

Madrid, Cataluña and Canarias were the main destinations of residents in Spain in March, with annual variation rates in the number of overnight stays of -26.9%, -49.2% and -80.4%, respectively.

Distribution of overnight stays Comparison March 2020-2021

Percentage



The main destinations for travellers residing in Spain are Comunidad de Madrid, Cataluña and Andalucía, which present annual rates of variation in overnight stays of -13.4%, -0.8% and -45.3%, respectively.

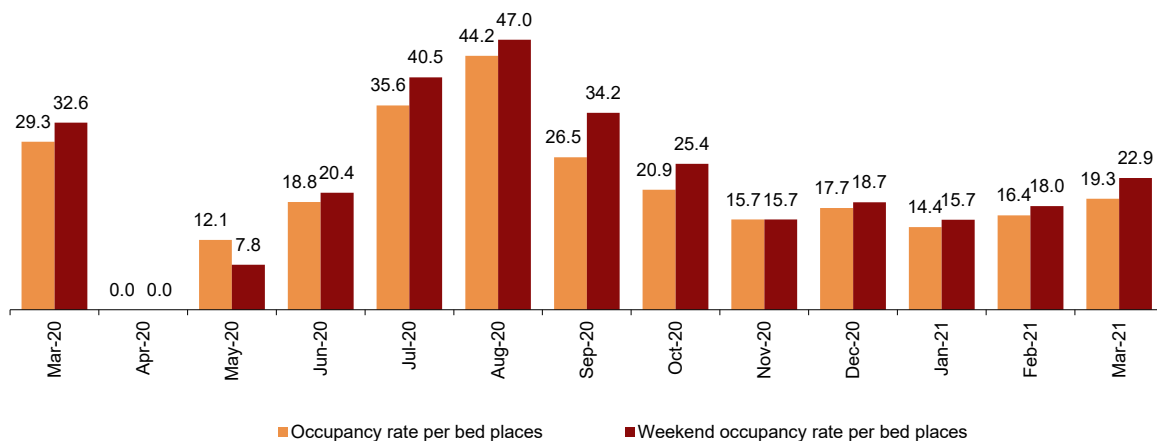
The main destination chosen by non-residents was Canarias, with 33.9% of total overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 86.6% as compared to March 2020. The next most popular destinations of non-residents were Comunidad de Madrid (with a decrease of 60.1%) and Cataluña (with a decrease of 78.9%).

Hotel occupancy

In March, 19.3% of the places offered were covered, with an annual decrease of 34.0%. The weekend occupancy rate by bed-places declined by 29.6%, standing at 22.9%.

Occupancy rate

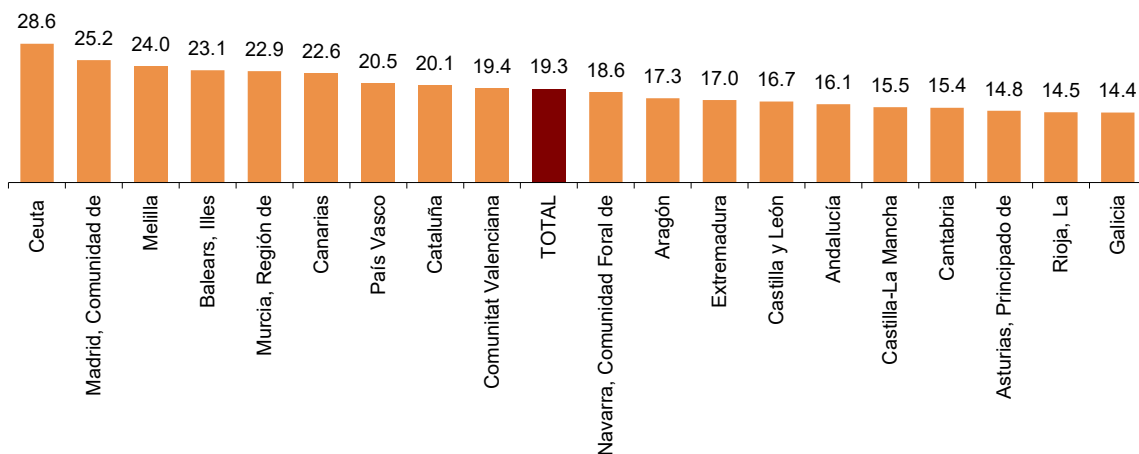
Percentage



The autonomous city of Ceuta showed the highest occupancy rate by bed-places in March (28.6%). It was followed by Comunidad de Madrid, with 25.2%.

Occupancy rate per bed places by autonomous community

Percentage



By tourist areas, El Hierro island reached both the highest level of occupancy by bed-places (27.4%), and the greatest weekend occupancy rate (37.1%). Tenerife had the highest number of overnight stays, with 194,369.

The tourist sites with the most overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Santa Cruz de Tenerife recorded the highest occupancy rate by bed-places (34.2%) and Plasencia the greatest weekend occupancy rate (47.4%).

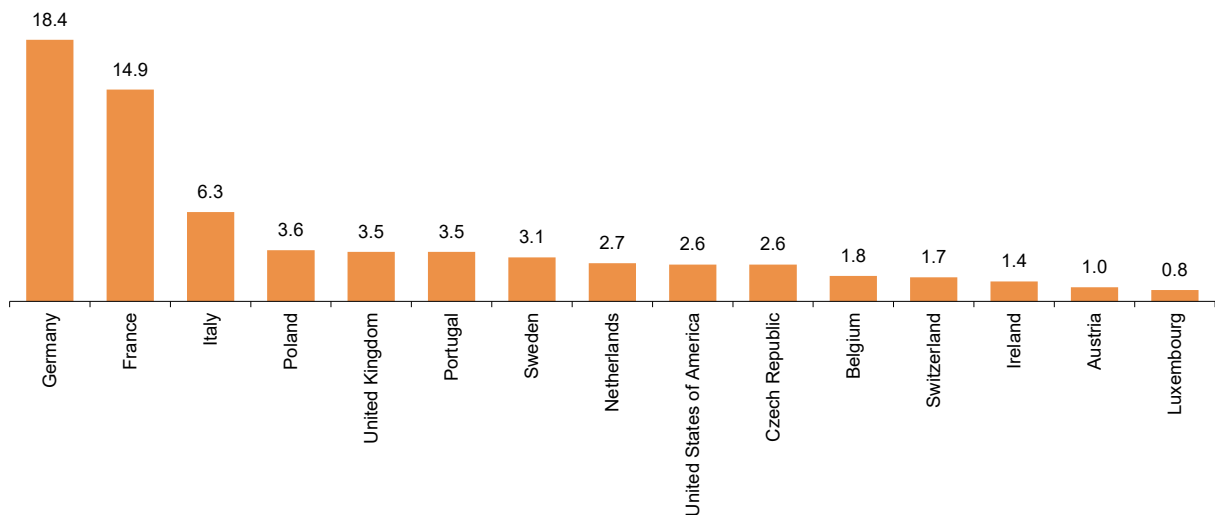
Overnight stays according to the country of origin of the travellers

Travellers from the Germany and France accounted for 18.4% and 14.9%, respectively, of total overnight stays of non-residents in hotel establishments in March. The German market had an annual variation rate of -84.3%, and the French market a rate of -59.1%.

Overnight stays of travellers from Italy, Poland and the United Kingdom (the next greatest countries of origin) registered annual rates of -52.2%, -56.0% and -97.3% respectively.

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

Percentage



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at -8.1% in March, which is 4.7 points below that registered in the same month of 2020 and 6.3 of a point more than that registered last month.

Hotel Prices Index

National by categories

	Index	Annual growth rate
TOTAL	91.3	-8.1
HOTELS: Gold stars		
Five	82.4	-5.2
Fourth	92.6	-7.7
Three	92.0	-10.4
Two	89.3	-9.8
One	94.1	-11.7
HOSTALS: Silver stars		
Three and two	88.5	-11.7
One	99.2	-8.7

By categories, the largest price decrease was recorded in establishments with one gold star (-11.7%). And the lowest, in those with five gold stars (-5.2%).

Hotel Sector Profitability

In March, hotels' average daily rate per occupied room (ADR) was 65.5 Euros, representing a decrease of 16.2% compared to the same month in 2020.

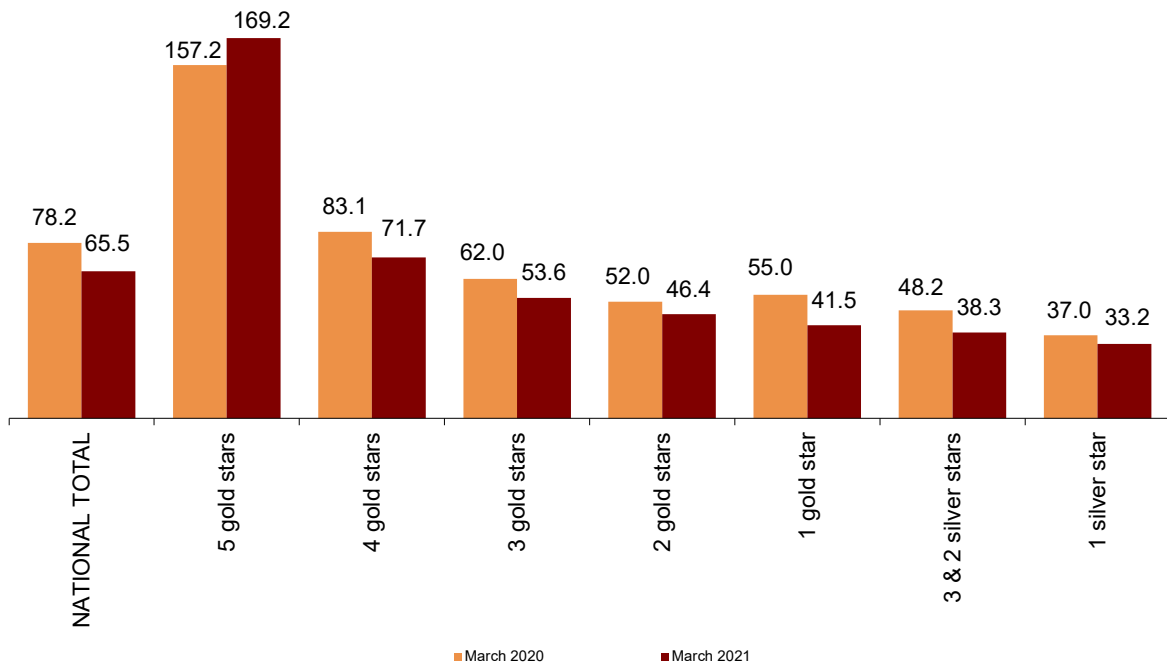
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 17.1 euros, with a 42.9% decrease.

By category, the average rate was 169.2 euros for five-star hotels, 71.7 euros for four-star hotels and 53.6 euros for three-star hotels. Revenue per available room for these same categories were 40.6, 21.1 and 14.8 euros, respectively.

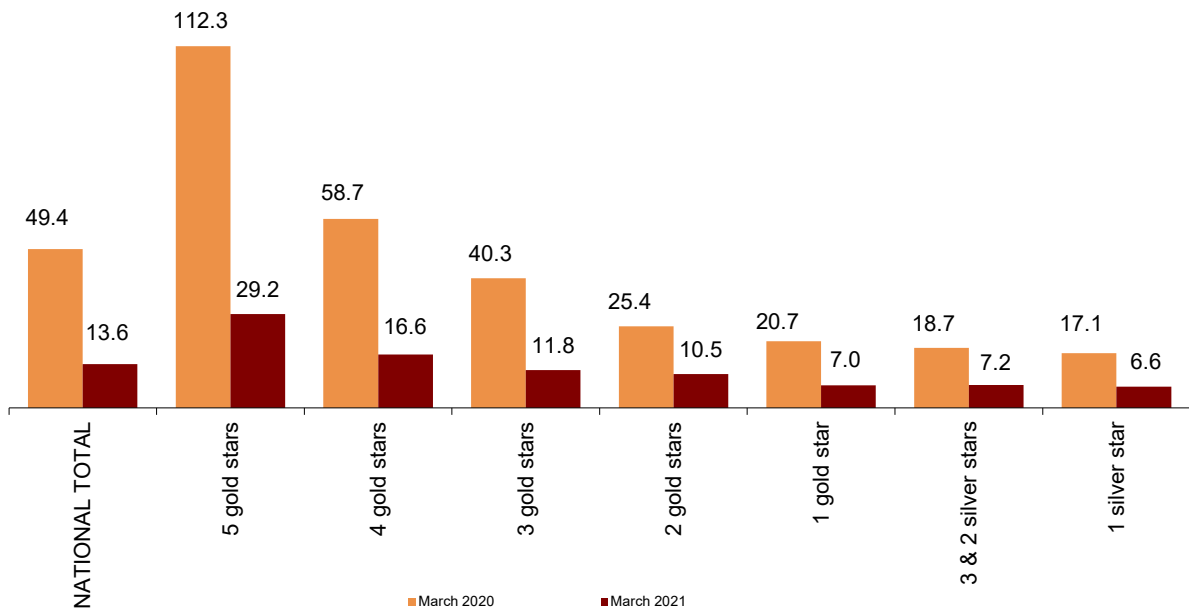
The tourist spot¹ with the highest ADR is Naut Aran, with an average daily billing per occupied room of 173.6 euros. The tourist spot with the highest RevPAR was Adeje, with an income per available room of 50.6 euros.

¹ The Hotel Profitability Indicators of the provinces and main tourist areas and points have been published since 2021. [IRSH en www.ine.es](https://www.ine.es)

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 2020 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, from the viewpoint of both supply and demand, thus meeting the needs of national institutions and the requirements of international organisations for knowledge regarding the sector.

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

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 way that, between all the establishments, the entire month is covered.

Sample design: stratified sampling by province and establishment category, with 4 and 5 gold star categories being exhaustive.

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 operation in INEbase.

INE statistics are produced in accordance with the Code of Good Practice for European Statistics, which is the basis for the institution's quality policy and strategy. For more information see the section on Quality at INE and the Code of Best Practices on the INE webpage.

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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

March 2021

Provisional Data

23rd April 2021

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	1.735.172	1.429.168	306.004	3.521.656	2.551.569	970.088	2,03
HOTELS: Golden stars							
Five	119.552	79.057	40.495	292.636	132.605	160.032	2,45
Four	777.787	626.404	151.383	1.511.534	1.050.002	461.533	1,94
Three	396.832	340.613	56.220	741.601	577.388	164.213	1,87
Two	160.952	139.730	21.222	294.092	245.335	48.758	1,83
One	72.156	63.012	9.144	136.673	115.829	20.844	1,89
INNS: Silver stars							
Two and three	123.023	107.125	15.898	265.910	225.372	40.538	2,16
One	84.870	73.228	11.642	279.210	205.039	74.171	3,29
Annual rate	-34,69	-1,82	-74,52	-57,94	-17,16	-81,67	-35,60
Cumulative annual rate	-72,91	-59,50	-89,02	-80,22	-62,46	-90,93	-26,98

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	8.416	289.703	586.610	19,32	22,93	26,26	54.050
HOTELS: Golden stars							
Five	130	21.851	46.101	20,39	28,27	23,72	10.001
Four	1.017	109.993	230.041	21,13	25,68	29,25	23.246
Three	1.066	55.946	116.317	20,52	24,01	27,85	9.680
Two	1.066	28.184	55.391	17,11	19,17	24,04	3.428
One	669	15.723	31.129	14,15	15,88	20,31	1.674
INNS: Silver stars							
Two and three	1.968	28.731	53.927	15,88	17,61	22,50	3.222
One	2.501	29.276	53.702	16,76	17,53	22,87	2.799
Annual rate	-22,02	-34,77	-36,25	-33,96	-29,60	-25,04	-55,50

3. Guests, overnight stays, occupancy, average stay and employed personnel

Results by area and tourist site

	Guests		Overnight stays		Occupancy rate			Average stay	Employed personnel
	Residents in Spain	Residents abroad	Residents in Spain	Residents abroad	Of bed-places	Of bed-places at weekend	Of bedrooms		
Tourist area with a greater occupancy rate per month									
Isla de El Hierro	703	79	1.829	286	27,40	37,06	33,96	2,70	35
Sur de Tenerife	19.483	15.502	45.936	99.480	26,98	33,81	30,49	4,16	3.960
Isla de Tenerife	31.607	22.216	70.906	123.463	26,61	32,11	31,91	3,61	4.870
Extremadura Norte	9.250	195	20.073	357	24,15	35,40	30,45	2,16	279
Palma-Calvià	8.251	12.869	18.113	45.367	23,50	27,85	34,99	3,01	833
Isla de La Gomera	2.485	1.436	5.498	7.126	23,45	29,54	28,05	3,22	382
Isla de Mallorca	10.678	14.249	26.381	51.743	23,42	26,49	34,39	3,13	950
Costa Barcelona	48.858	10.268	99.365	25.895	22,83	26,13	33,02	2,12	1.342

Tourist area with a greater number of overnight stays per month¹

Barcelona	67.000	31.331	109.139	75.312	19,14	25,47	25,61	1,88	3.054
Isla Gran Canaria	33.453	17.128	82.105	101.283	21,34	25,73	25,91	3,63	3.664
Sur de Gran Canaria	20.270	11.926	49.107	78.913	19,14	23,28	21,36	3,98	2.833
Costa del Sol	45.545	16.161	72.577	42.648	15,26	18,57	21,91	1,87	2.327
Costa Blanca	44.876	8.030	79.851	17.755	20,22	29,74	26,85	1,84	1.559
Isla de Fuerteventura	3.589	10.123	14.795	79.532	22,48	22,44	32,54	6,88	1.761
Costa Brava	37.871	10.833	58.293	18.719	20,17	26,46	25,94	1,58	977
Costa de la Luz de Cádiz	23.184	4.532	39.455	18.965	18,49	22,19	26,98	2,11	833

¹Sin considerar los incluidos en la tabla anterior, por aparecer también con mayor grado de ocupación.

Tourist site with a greater occupancy rate per month

Santa Cruz de Tenerife	7.413	3.257	14.721	8.293	34,16	36,11	53,54	2,16	382
Plasencia	3.806	104	6.997	153	33,98	47,35	39,29	1,83	83
Arona	1.056	2.125	3.052	16.136	31,78	36,41	37,14	6,03	207
Palma de Mallorca	9.356	11.218	21.913	38.663	30,95	35,77	40,67	2,94	789
Alcalá de Henares	10.559	1.392	16.450	2.633	29,75	39,73	38,17	1,60	207
Palmas de Gran Canaria, Las	10.357	4.635	25.533	20.846	29,06	33,14	40,18	3,09	639
Adeje	13.155	9.530	27.845	59.128	28,08	35,71	30,99	3,83	2.476
Elche	6.110	611	9.484	1.125	27,27	39,34	37,41	1,58	143
León	8.862	676	18.856	943	26,97	26,40	37,94	2,08	197
Badajoz	6.000	618	9.963	1.149	26,53	26,58	30,18	1,68	127

Tourist site with a greater number of overnight stays per month¹

Madrid	137.031	52.761	241.813	150.018	24,05	27,91	31,81	2,06	4.429
Barcelona	60.831	29.555	100.131	69.101	19,32	26,10	25,65	1,87	2.825
San Bartolomé de Tirajana	12.292	10.011	27.041	65.546	19,03	21,26	20,55	4,15	2.187
Sevilla	42.188	4.766	63.947	10.832	18,48	26,02	25,13	1,59	1.051
Valencia	30.316	7.426	48.820	15.187	19,34	23,81	27,83	1,70	859
Málaga	27.049	7.032	40.137	13.140	19,91	23,79	27,05	1,56	644
Pájara	1.807	6.415	5.980	46.883	24,20	21,64	32,52	6,43	1.139
Zaragoza	24.737	3.290	42.694	8.479	22,58	20,41	33,10	1,83	457
Marbella	9.845	7.047	19.242	22.674	17,18	20,88	28,96	2,48	1.324
Bilbao	22.387	3.108	33.803	6.082	17,63	24,67	22,82	1,56	655

¹Sin considerar los incluidos en la tabla anterior, por aparecer también con mayor grado de ocupación.

4. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	1.735.172	100,00	3.521.656	100,00
Residents in Spain	1.429.168	82,36	2.551.569	72,45
Residents abroad	306.004	17,64	970.088	27,55
Total Residents abroad	306.004	100,00	970.088	100,00
TOTAL Residents in EU (without Spain)	198.627	64,91	651.725	67,18
- Germany	40.164	13,13	178.360	18,39
- Austria	2.466	0,81	10.084	1,04
- Belgium	6.224	2,03	17.253	1,78
- Denmark	2.047	0,67	7.267	0,75
- Finland	1.582	0,52	4.676	0,48
- France	57.530	18,80	144.474	14,89
- Greece	1.251	0,41	4.672	0,48
- Ireland	2.938	0,96	13.973	1,44
- Italy	21.692	7,09	60.637	6,25
- Luxembourg	1.451	0,47	7.346	0,76
- Netherlands	10.668	3,49	26.286	2,71
- Poland	7.215	2,36	34.749	3,58
- Portugal	14.642	4,78	33.830	3,49
- Czech Republic	4.087	1,34	24.776	2,55
- Sweden	6.370	2,08	30.136	3,11
-Other EU countries ¹	18.301	5,98	53.207	5,48
Norway	1.112	0,36	4.673	0,48
United Kingdom	13.648	4,46	34.134	3,52
Russia	4.293	1,40	11.932	1,23
Switzerland	5.214	1,70	16.825	1,73
Rest of Europe	13.642	4,46	34.361	3,54
Japan	612	0,20	2.487	0,26
Republic of China	3.858	1,26	6.803	0,70
United States of America	6.894	2,25	25.452	2,62
Rest of America	29.021	9,48	73.384	7,56
Africa	14.864	4,86	68.833	7,10
Other countries	14.218	4,65	39.480	4,07

¹ Countries included in Other UE countries: Bulgaria, Cyprus, Croatia, Slovakia, Slovenia, Esthonia, Hungary, Latvia, Lithuania, Malta and Romania

Hotel Price Index (HPI). 2008 Base March 2021

Provisional data

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

	Index	Annual growth rate
TOTAL	91,28	-8,09
Andalucía	86,78	-6,34
Aragón	76,09	-6,74
Asturias, Principado de	73,23	-6,74
Balears, Illes	111,71	1,59
Canarias	117,93	-7,52
Cantabria	76,54	-9,34
Castilla y León	84,10	-9,36
Castilla - La Mancha	81,95	-6,91
Cataluña	74,32	-14,13
Comunitat Valenciana	95,21	-2,65
Extremadura	83,07	-3,86
Galicia	87,00	-1,76
Madrid, Comunidad de	70,40	-16,69
Murcia, Región de	73,11	-6,78
Navarra, Comunidad Foral de	84,80	-4,91
País Vasco	76,94	-10,41
Rioja, La	76,34	-8,15
Ceuta	75,13	-14,33
Melilla	103,46	2,05

2. National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	91,28	-8,09
HOTELS: Gold stars		
Five	82,44	-5,19
Fourth	92,58	-7,67
Three	92,04	-10,38
Two	89,28	-9,77
One	94,11	-11,69
HOSTALS: Silver stars		
Three and two	88,51	-11,65
One	99,16	-8,73

Indicators on the Profitability of the Hotel Sector

March 2021

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	65,51	-16,22	17,08	-42,90
Andalucía	61,18	-6,25	14,10	-42,01
Aragón	49,28	-17,37	11,48	-36,30
Asturias, Principado de	46,11	-8,16	10,05	2,59
Balears, Illes	89,27	26,73	33,67	2,64
Canarias	102,56	-2,50	29,86	-48,11
Cantabria	52,97	-8,88	11,01	-21,48
Castilla y León	47,95	-13,30	10,69	-23,47
Castilla - La Mancha	46,37	-10,92	10,08	-9,29
Cataluña	73,55	-13,36	20,37	-33,24
Comunitat Valenciana	59,66	6,46	15,22	-26,44
Extremadura	52,42	-2,61	12,09	-9,58
Galicia	46,48	-5,37	8,56	-17,15
Madrid, Comunidad de	62,08	-18,19	20,72	-23,11
Murcia, Región de	49,66	-10,02	14,88	-15,02
Navarra, Comunidad Foral de	57,32	-3,84	15,05	-6,34
País Vasco	59,27	-9,09	16,04	-26,43
Rioja, La	50,99	-27,22	11,29	-40,84
Ceuta	60,44	5,29	18,79	-7,83
Melilla	67,57	-6,85	23,35	-16,76

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	65,51	-16,22	17,08	-42,90
HOTELS: Gold stars				
Five	169,23	7,64	40,59	-29,74
Four	71,72	-13,70	21,10	-38,39
Three	53,62	-13,57	14,75	-42,79
Two	46,36	-10,79	11,15	-34,40
One	41,45	-24,70	8,48	-35,75
GUESTHOUSES: Silver stars				
Three and two	38,28	-20,51	8,17	-28,05
One	33,15	-10,31	6,95	-30,68

¹ ADR: Average Daily Rate

RevPAR: Revenue per Available Room