

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
March 2023. Provisional data

**Overnight stays in hotel establishments increase 17.1% in March
with respect to the same month in 2022**

**Hotels invoice an average of 99.3 euros per occupied room,
representing an increase of 11.0% compared to the previous month**

During the month of March, overnight stays in hotel establishments exceeded 20.6 million. This represents an increase of 17.1% compared to the same month in 2022, when there were only 17.6 million.

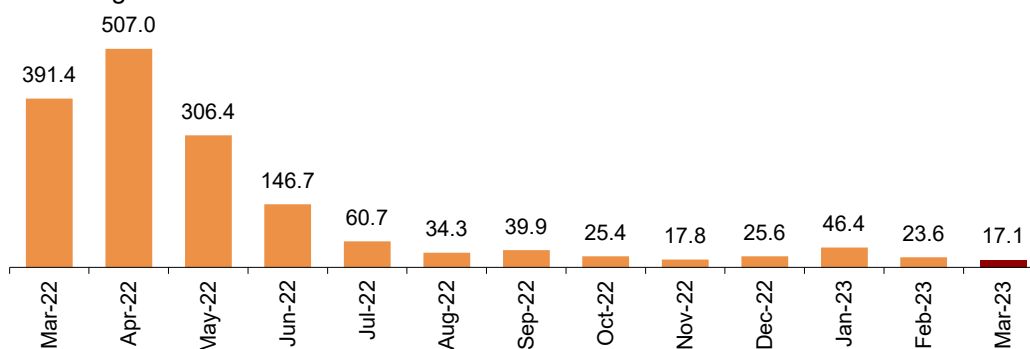
Based on place of origin, overnight stays by travellers residing in Spain exceeded 8.0 million, representing 39.0% of the total. In turn, overnight stays by non-residents stood at over 12.6 million.

On the other hand, the average stay decreased 4.0% compared to March 2022, standing at 2.8 overnight stays per traveller.

During the first three months of 2023, overnight stays increased by 26.6% compared to the same period of the previous year, reaching a level similar to those of the first three months of 2019.

Annual variation rate for overnight stays

Percentage

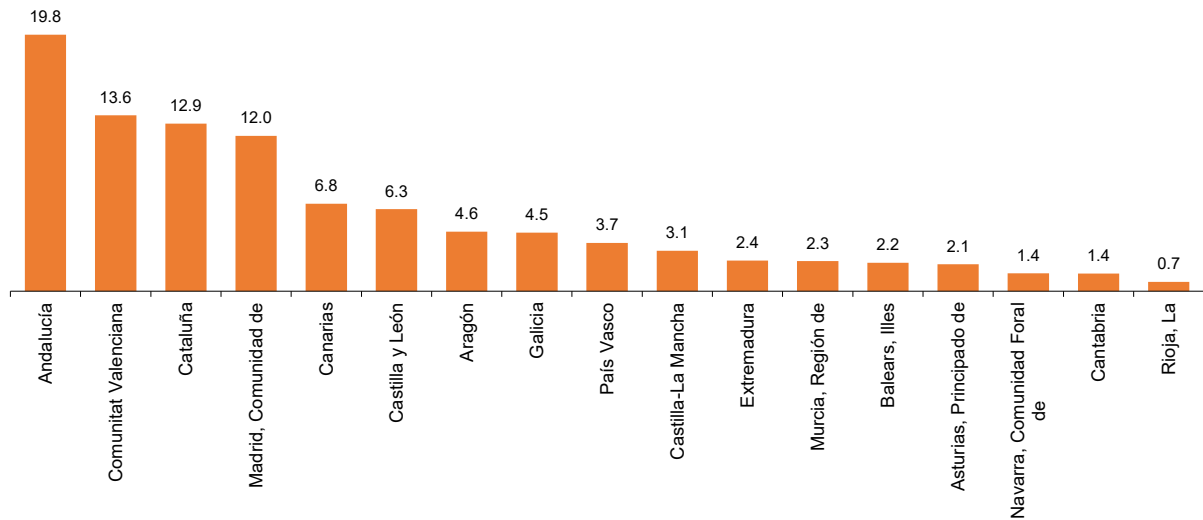


Destinations

In March, Andalucía, Comunitat Valenciana and Cataluña were the main destinations for travellers who are residents in Spain, with 19.8%, 13.6% and 12.9% of total overnight stays, respectively.

Distribution of overnight stays: residents

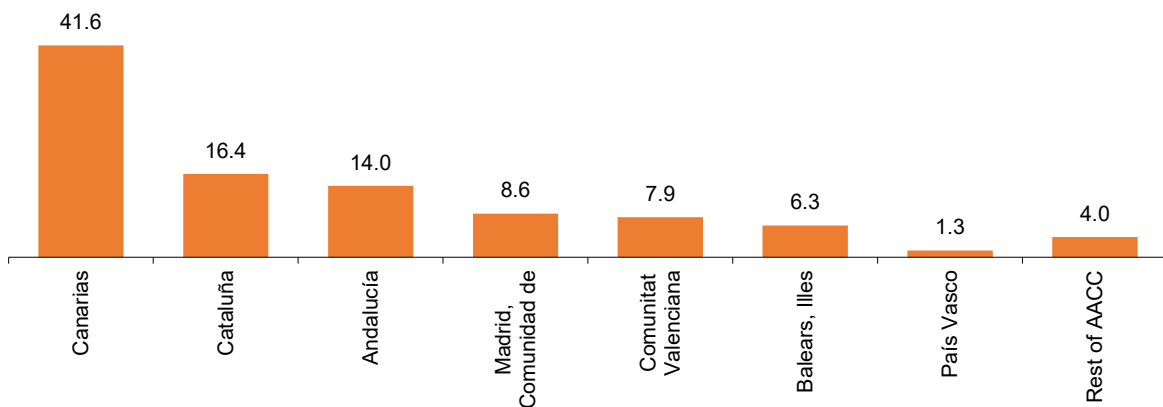
Percentage



The main destination chosen by non-residents was Canarias, with 41.6% of total overnight stays. Following that, the main destinations were Cataluña and Andalucía, with 16.4% and 14.0% of the total, respectively.

Distribution of overnight stays: non-residents

Percentage

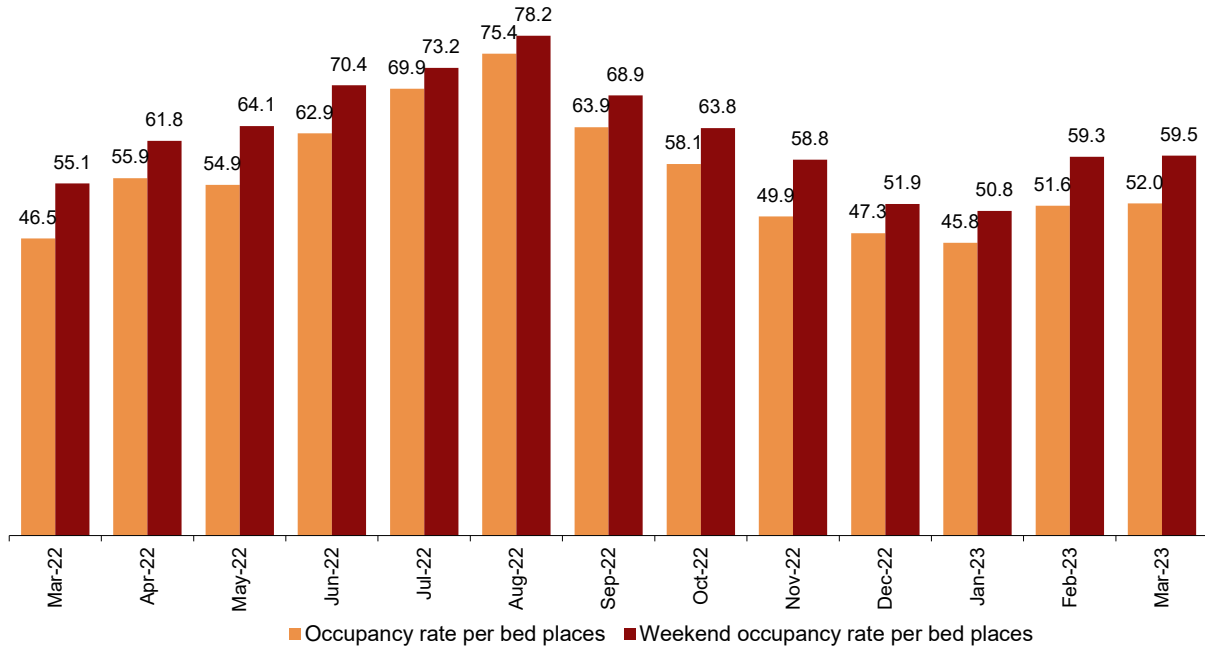


Hotel occupancy

In March, 52.0% of the available bed-places were occupied, indicating an annual increase of 11.9%. The weekend occupancy rate by bedplaces increased 7.9%, and stood at 59.5%.

Occupancy rate

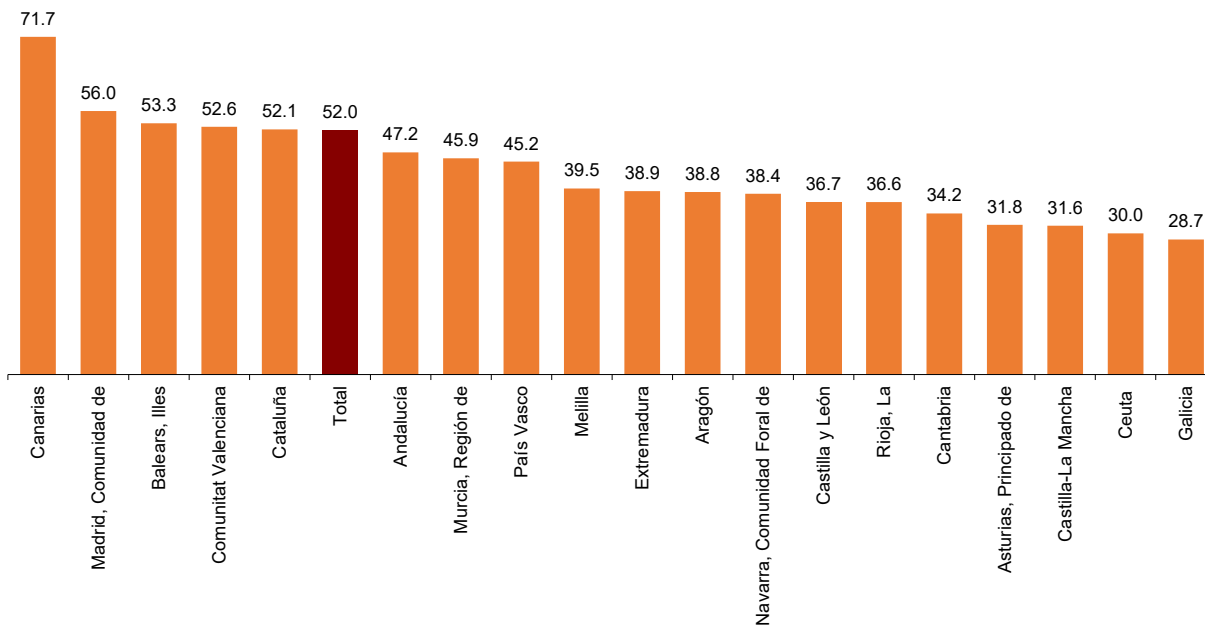
Percentage



Canarias registered the highest occupancy rate by bed-places in March (71.7%). It was followed by Comunidad de Madrid, with 56.0%.

Occupancy rate per bed-places by Autonomous Community.

Percentage



By tourist areas, Sur de Gran Canaria reached the greatest occupancy rate by bed-places (74.4%), while Sur de Tenerife achieved the greatest weekend occupancy rate (76.4%). The island of Tenerife registered the highest number of overnight stays in March, with 2,135,044 million.

The tourist places with more overnight stays were Barcelona, Madrid and San Bartolomé de Tirajana. Arona had the highest occupancy rate by bed places (77.8%) along with the greatest weekend occupancy rate (79.3%).

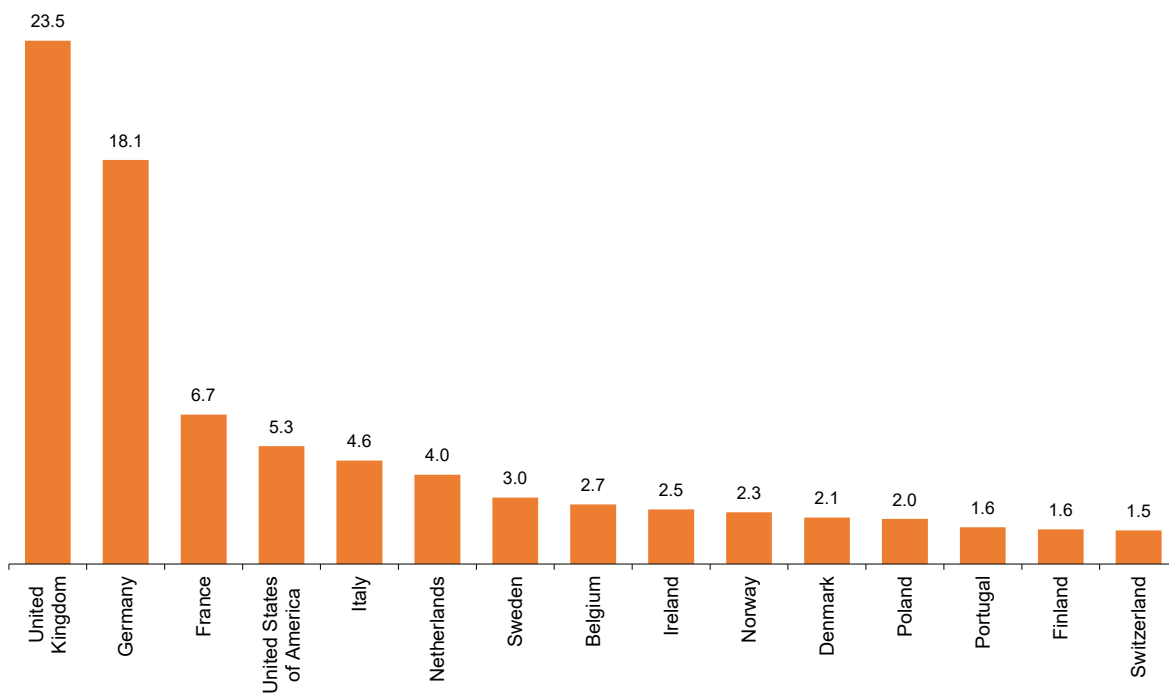
Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany accounted for 23.5% and 18.1%, respectively, of total overnight stays of non-residents in hotel establishments in March.

Overnight stays by travellers from the France, the United States and Italy (the following source markets) accounted for 6.7%, 5.3% and 4.6% of the total, respectively.

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

Percentage

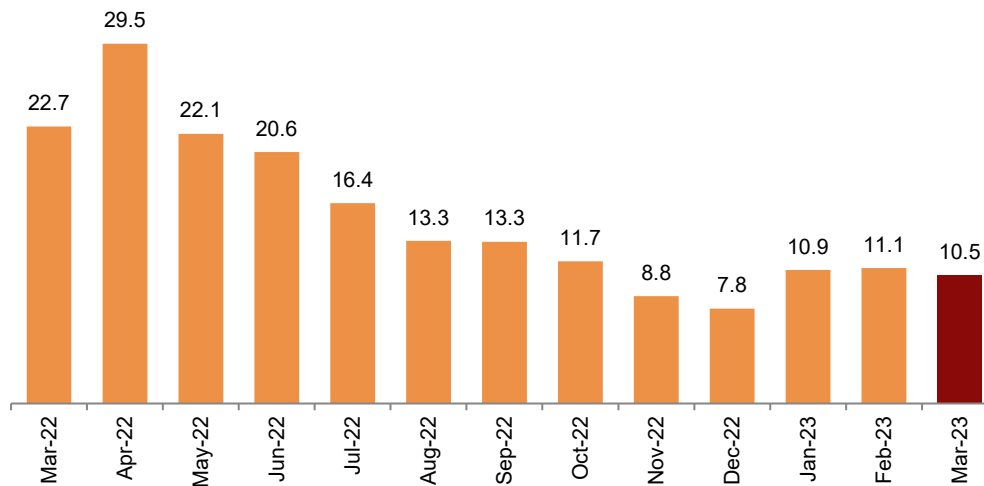


Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 10.5%, which was 12.2 points above that registered in the same month of 2022 and 0.6 of a point less than that registered last month.

Hotel Prices Index

Annual variation rate. Percentage



By Autonomous Community, the greatest increases of hotel prices compared to March 2022 were in Cataluña (18.2%) and Melilla (13.5%). On the other hand, the lowest decrease was recorded in Cantabria, with an annual variation rate of 0.3%.

By categories, the greatest price increase was registered in one-silver star establishments (18.3%).

Hotel Sector Profitability

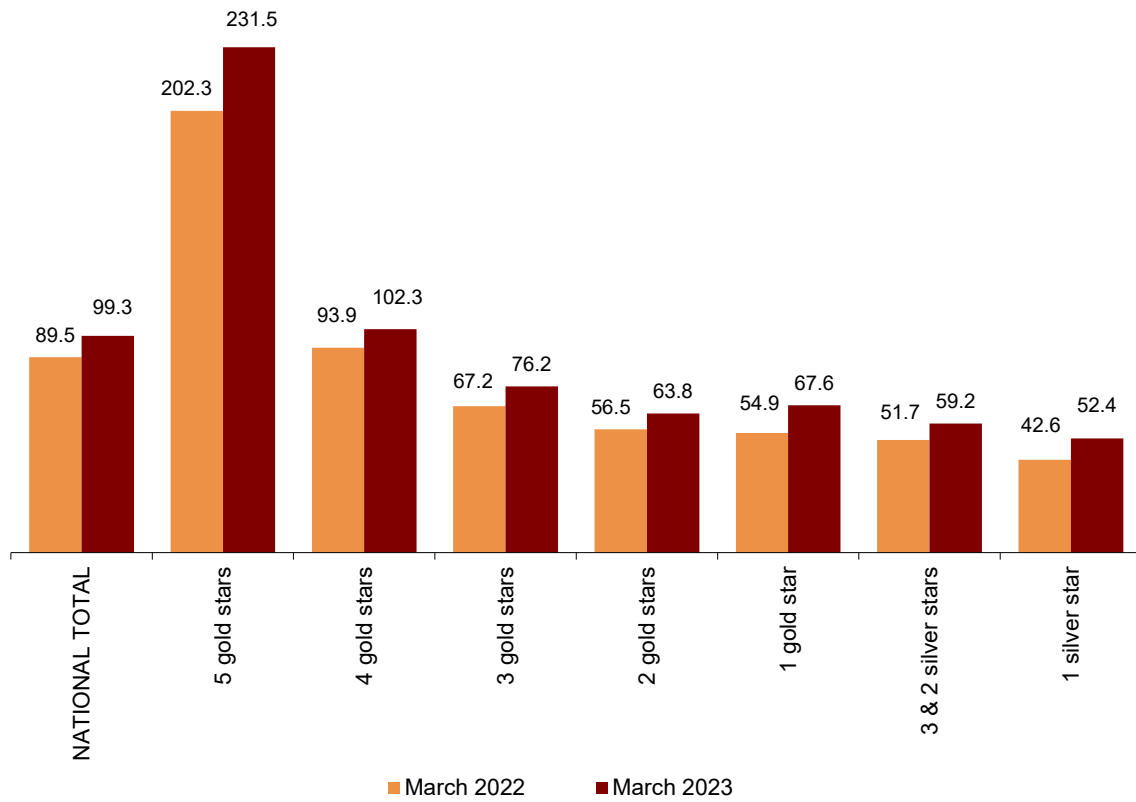
The average daily rate of hotels per occupied room (ADR) was 99.3 euros in March, which means an increase of 11.0% compared to the same month of 2022.

On the other hand, the average daily revenue per available room (RevPAR), which is determined by the occupancy registered in hotel establishments, reached 62.2 Euros, increasing by 23.8%.

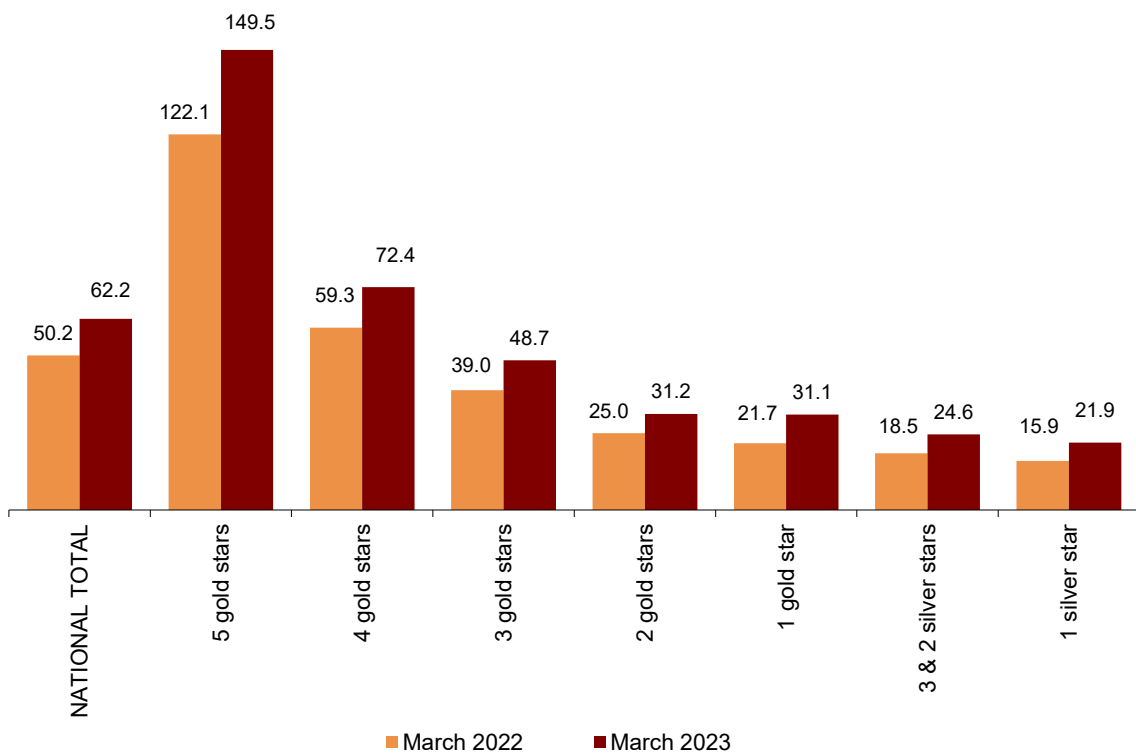
By category, the average rate was 231.5 euros for five-star hotels, 102.3 euros for four-star hotels and 76.2 euros for three-star hotels. Revenue per available room for these same categories were 149.5, 72.4 and 48.7 euros, respectively.

The tourist spot with the highest ADR is Naut Aran, with an average daily billing per occupied room of 172.5 euros. On the other hand, Adeje had the highest RevPar, with revenue per available room of 148.9 euros.

Average daily rate by hotel
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 2022 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.

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

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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

Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

March 2023

Provisional Data

24th April 2023

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	7,391,097	3,996,988	3,394,109	20,648,210	8,041,791	12,606,419	2.79
HOTELS: Golden stars							
Five	476,008	135,638	340,370	1,626,728	254,952	1,371,776	3.42
Four	3,656,282	1,797,956	1,858,326	11,080,275	3,686,535	7,393,740	3.03
Three	1,714,617	1,012,908	701,709	4,793,718	2,163,873	2,629,844	2.80
Two	560,700	379,975	180,725	1,160,316	691,316	469,000	2.07
One	237,236	145,570	91,666	494,673	256,621	238,052	2.09
INNS: Silver stars							
Two and three	386,619	270,790	115,829	757,182	490,206	266,976	1.96
One	359,635	254,151	105,483	735,318	498,287	237,031	2.04
Annual rate	21.94	16.43	29.13	17.10	13.72	19.37	-3.97
Cumulative annual rate	25.12	14.96	40.20	26.64	15.13	35.01	1.21

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	13,094	607,534	1,270,726	51.99	59.47	62.80	179,040
HOTELS: Golden stars							
Five	311	45,195	96,374	54.05	59.35	64.99	31,624
Four	2,213	284,251	610,138	58.08	65.42	70.91	93,273
Three	2,086	131,504	282,559	54.19	61.23	64.94	33,867
Two	1,689	47,406	93,252	39.93	49.56	48.88	7,667
One	975	21,879	43,737	36.35	45.76	45.54	3,140
INNS: Silver stars							
Two and three	2,546	38,324	72,944	33.39	42.12	40.94	5,188
One	3,275	38,975	71,722	33.00	40.94	41.96	4,282
Annual rate	1.91	4.09	4.71	11.85	7.94	12.19	14.40

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									
Sur de Gran Canaria	19,478	175,583	68,103	1,345,210	74.38	74.87	85.31	7.25	12,157
Sur de Tenerife	23,488	227,316	96,511	1,573,335	73.66	76.41	86.62	6.66	16,159
Isla de Tenerife	70,458	277,759	269,771	1,865,273	73.58	75.90	86.04	6.13	19,810
Isla de Gran Canaria	44,585	197,994	130,709	1,429,525	72.94	74.09	84.29	6.43	13,470
Isla de Lanzarote	20,537	117,603	75,792	842,898	72.94	72.86	91.78	6.65	7,517
Isla de La Gomera	1,798	5,664	4,246	35,748	72.51	74.68	83.41	5.36	411
Isla de Fuerteventura	12,810	132,132	44,072	1,028,778	67.26	67.42	80.91	7.40	9,691
Barcelona	170,500	539,617	321,434	1,500,227	64.43	72.16	77.98	2.57	14,140

Tourist area with a greater number of overnight stays per month¹

Costa del Sol	173,243	235,949	390,240	901,360	55.97	61.20	71.32	3.16	11,354
Costa Blanca	171,835	152,849	519,939	650,323	55.05	65.33	63.99	3.60	8,796
Isla de Mallorca	51,317	164,542	146,184	771,429	53.90	52.08	65.33	4.25	9,431
Palma - Calvià	40,224	119,825	127,406	522,872	56.97	55.87	66.57	4.06	6,474
Costa Barcelona	122,270	101,209	234,824	246,276	49.92	52.61	63.90	2.15	3,398
Costa Brava	76,398	80,742	147,300	213,980	41.05	51.44	48.33	2.30	3,370
Costa de la Luz de Cádiz	72,112	41,244	132,344	144,789	38.09	48.24	51.56	2.44	3,315
Costa de Almería	44,049	14,551	117,694	54,769	34.42	40.42	48.90	2.94	1,613

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

Arona	5,245	65,419	21,448	463,095	77.83	79.29	88.36	6.86	3,138
Puerto de La Cruz	25,294	34,347	126,040	238,617	77.66	77.42	86.77	6.11	2,644
Tías	3,726	37,345	13,559	282,061	75.49	75.83	92.95	7.20	2,109
Adeje	7,855	118,421	28,078	856,722	75.42	76.81	87.86	7.01	9,237
San Bartolomé de Tirajana	16,842	128,619	58,206	977,201	74.80	75.89	85.77	7.12	9,374
Teguise	6,522	24,271	23,155	173,750	74.49	75.00	96.21	6.39	1,486
Mogán	2,615	47,393	9,011	372,044	73.85	73.05	84.34	7.62	2,952
San Sebastián de La Gomera	1,530	4,470	3,405	25,823	72.47	75.25	84.23	4.87	327
Yaiza	5,625	51,724	28,965	369,322	70.81	69.61	89.48	6.94	3,718
Oliva, La	3,234	30,955	10,557	227,625	69.95	70.63	87.70	6.97	2,033

Tourist site with a greater number of overnight stays per month¹

Barcelona	153,567	510,825	294,389	1,433,778	65.39	73.32	78.72	2.60	13,587
Madrid	396,724	422,330	663,816	972,642	57.99	68.88	73.35	2.00	12,453
Benidorm	88,090	81,505	359,876	413,248	59.39	69.36	66.44	4.56	5,459
Pájara	5,078	72,005	21,661	600,133	69.04	69.61	78.37	8.07	5,959
Sevilla	128,703	127,021	238,310	299,339	67.91	76.19	78.51	2.10	3,697
Palma de Mallorca	37,468	85,937	116,322	332,572	59.53	60.21	69.81	3.64	4,502
Valencia	92,652	85,087	160,260	216,323	62.12	72.39	74.84	2.12	2,746
Torre Molinos	27,904	46,528	102,899	243,769	65.26	69.49	76.05	4.66	2,152
Málaga	63,702	69,810	108,551	160,920	64.57	70.17	81.58	2.02	2,044
Granada	75,193	62,300	132,518	112,798	59.79	72.49	69.17	1.78	1,582

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	7,391,097	100.00	20,648,210	100.00
Residents in Spain	3,996,988	54.08	8,041,791	38.95
Residents abroad	3,394,109	45.92	12,606,419	61.05
Total Residents abroad	3,394,109	100.00	12,606,419	100.00
TOTAL Residents in EU (without Spain)	1,731,584	51.02	6,754,733	53.58
- Germany	426,135	12.56	2,282,999	18.11
- Austria	30,087	0.89	112,220	0.89
- Belgium	77,175	2.27	336,923	2.67
- Denmark	50,457	1.49	262,315	2.08
- Finland	37,625	1.11	195,887	1.55
- France	314,594	9.27	843,080	6.69
- Greece	12,241	0.36	40,341	0.32
- Ireland	70,249	2.07	309,044	2.45
- Italy	207,090	6.10	583,830	4.63
- Luxembourg	5,339	0.16	26,448	0.21
- Netherlands	130,404	3.84	503,681	4.00
- Poland	63,548	1.87	254,762	2.02
- Portugal	99,668	2.94	206,973	1.64
- Czech Republic	20,739	0.61	79,801	0.63
- Sweden	73,024	2.15	375,362	2.98
-Other EU countries ¹	113,211	3.34	341,066	2.71
Norway	47,878	1.41	292,494	2.32
United Kingdom	592,706	17.46	2,956,665	23.45
Switzerland	55,092	1.62	189,378	1.50
Rest of Europe	113,252	3.34	365,418	2.90
Japan	20,998	0.62	44,314	0.35
Republic of China	40,092	1.18	91,372	0.72
United States of America	266,883	7.86	665,785	5.28
Rest of America	267,693	7.89	641,488	5.09
Africa	55,230	1.63	130,327	1.03
Other countries	202,702	5.97	474,446	3.76

Note: Since March 2022, "Russia" is included in the aggregate "Rest of Europe".

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 2023

Provisional data

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

	Index	Annual growth rate
TOTAL	124.13	10.52
Andalucía	119.07	9.12
Aragón	94.78	10.01
Asturias, Principado de	88.83	4.47
Balears, Illes	127.51	2.03
Canarias	159.97	9.19
Cantabria	88.30	0.30
Castilla y León	101.06	6.11
Castilla - La Mancha	98.11	6.72
Cataluña	108.92	18.21
Comunitat Valenciana	125.95	11.84
Extremadura	95.98	3.55
Galicia	102.72	6.65
Madrid, Comunidad de	110.22	12.92
Murcia, Región de	89.03	4.81
Navarra, Comunidad Foral de	97.18	6.59
País Vasco	95.87	7.83
Rioja, La	93.39	2.74
Ceuta	78.66	2.13
Melilla	114.90	13.52

2. National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	124.13	10.52
HOTELS: Gold stars		
Five	116.17	8.61
Fourth	126.27	10.32
Three	124.51	11.72
Two	113.62	11.30
One	117.27	11.73
HOSTALS: Silver stars		
Three and two	123.28	12.96
One	140.55	18.34

Indicators on the Profitability of the Hotel Sector

March 2023

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	99.32	10.95	62.17	23.76
Andalucía	86.90	9.58	51.39	24.93
Aragón	72.21	15.60	34.97	30.12
Asturias, Principado de	56.48	6.21	21.29	19.70
Balears, Illes	91.19	6.48	54.08	15.36
Canarias	128.28	9.62	109.47	16.01
Cantabria	59.43	-5.69	23.85	-10.65
Castilla y León	59.08	3.55	26.02	21.34
Castilla - La Mancha	59.17	7.51	23.17	29.09
Cataluña	114.11	18.41	73.42	35.28
Comunitat Valenciana	74.51	10.00	46.72	27.62
Extremadura	60.68	2.48	28.86	18.82
Galicia	56.42	4.35	20.06	11.37
Madrid, Comunidad de	113.65	17.12	81.75	34.22
Murcia, Región de	56.02	-1.51	30.71	8.87
Navarra, Comunidad Foral de	68.10	12.68	32.97	19.11
País Vasco	79.88	11.48	44.36	23.43
Rioja, La	66.67	-5.47	30.58	13.29
Ceuta	70.61	11.50	27.67	26.09
Melilla	74.35	9.74	44.34	25.41

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	99.32	10.95	62.17	23.76
HOTELS: Gold stars				
Five	231.45	14.40	149.49	22.44
Four	102.34	9.03	72.40	22.15
Three	76.17	13.40	48.66	24.84
Two	63.82	12.98	31.23	25.12
One	67.61	23.26	31.06	42.95
GUESTHOUSES: Silver stars				
Three and two	59.20	14.49	24.62	33.35
One	52.36	23.00	21.88	37.22

¹ ADR: Average Daily Rate
RevPAR: Revenue per Available Room