



30 April 2025
TOURIST ACTIVITY
March 2025 – Flash statistics

OVERNIGHT STAYS DECLINED, DESPITE THE GROWTH AMONG RESIDENTS

The **tourist accommodation sector**¹ accounted for 2.3 million guests (-0.1%)² and 5.6 million overnight stays (-3.0%) in **March 2025**, amounting to EUR 406.9 million in total revenue and EUR 302.1 million in revenue from accommodation (+0.3% and -0.4%, respectively).

The decline in overnight stays was driven by the external markets, which fell by 5.2% (-3.1% in February), totalling 3.9 million. In contrast, residents' overnight stays increased by 2.4% (-1.2% in February), at 1.7 million.

Among the top 10 inbound markets in terms of overnight stays in March, the Polish stood out with a growth of 35.9%. Conversely, the Spanish market stood out as well, with the largest decrease (-37.0).

The revenue per available room (RevPAR) stood at EUR 48.7 (-2.1%) and the average daily rate (ADR) amounted to EUR 96.5 (-0.1%).

It should be noted that the results for March were influenced by the moving structure of the calendar, i.e. by the effect of the holiday periods associated with Carnival and Easter. This year, the Carnival period took place in March, while in the previous year it was concentrated in February. The Easter period occurred in April, whereas in 2024 was mainly concentrated in March.

Figure 1. Monthly overview of the activity of tourist accommodation establishments, March 2025



¹ Monthly series that include three accommodation segments: hotel establishments (hotels, apartment hotels, tourist apartments, tourist villages, pousadas, and quintas in Madeira), local accommodation with 10 or more beds (following the statistical threshold laid down in EU Regulation 692/2011) and rural and lodging tourism.

² Unless otherwise stated, the rates of change shown in this press release correspond to year-on-year rates of change, compared to the same period in the previous year.