

24 September 2018

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
August 2018. Provisional data

Overnight stays in hotel establishments decrease by 0.6% in August as compared with the same month of 2017

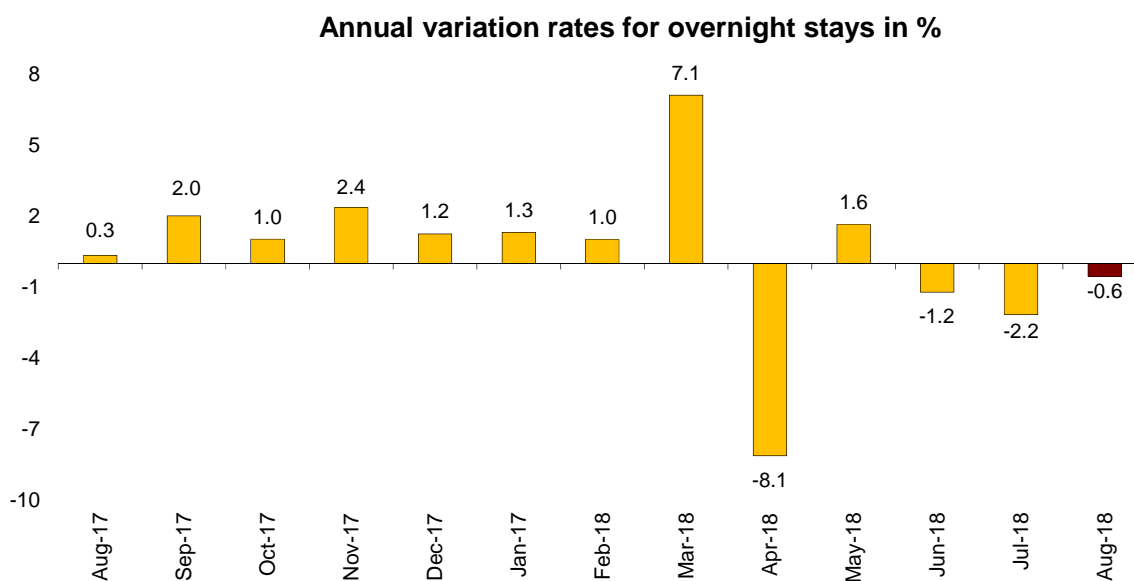
Hotels invoice an average of 107.2 euros per occupied room, representing an annual increase of 1.7%

During the month of August overnight stays in hotel establishments exceeded 46.3 million, 0.6% less than in the same month of 2017. Overnight stays by residents in Spain increased by 2.9%, while those of non-residents decreased by 2.5%.

The average stay decreased 2.0% as compared with August 2017, standing at 3.7 overnight stays per traveller.

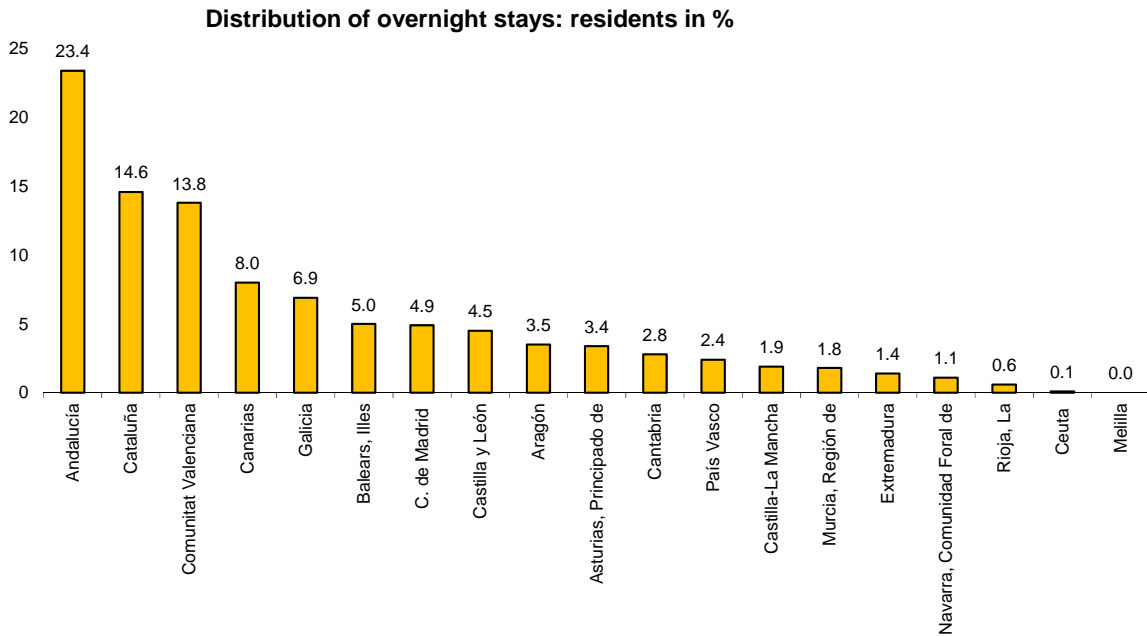
During the aggregate July-August period, the number of overnight stays fell 1.3% compared with the same period in 2017. Overnight stays by residents increased 1.1%, while those by non-residents decreased by 2.6%.

During the first eight months of 2018, overnight stays decreased by 0.7% as compared with the same period of the previous year.

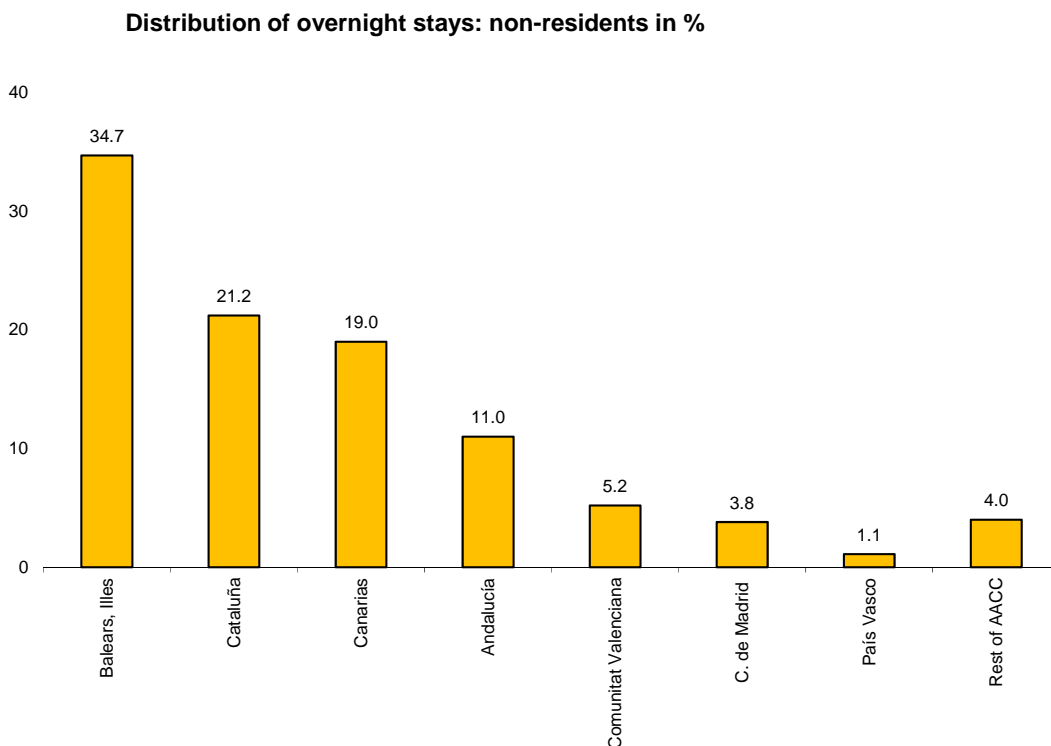


Destinations

Andalucía, Cataluña, Comunitat Valenciana and Canarias were the main destinations of residents in Spain in August, with annual variation rates in the number of overnight stays of 11.5%, -1.4%, 3.2% and 10.4%, respectively.

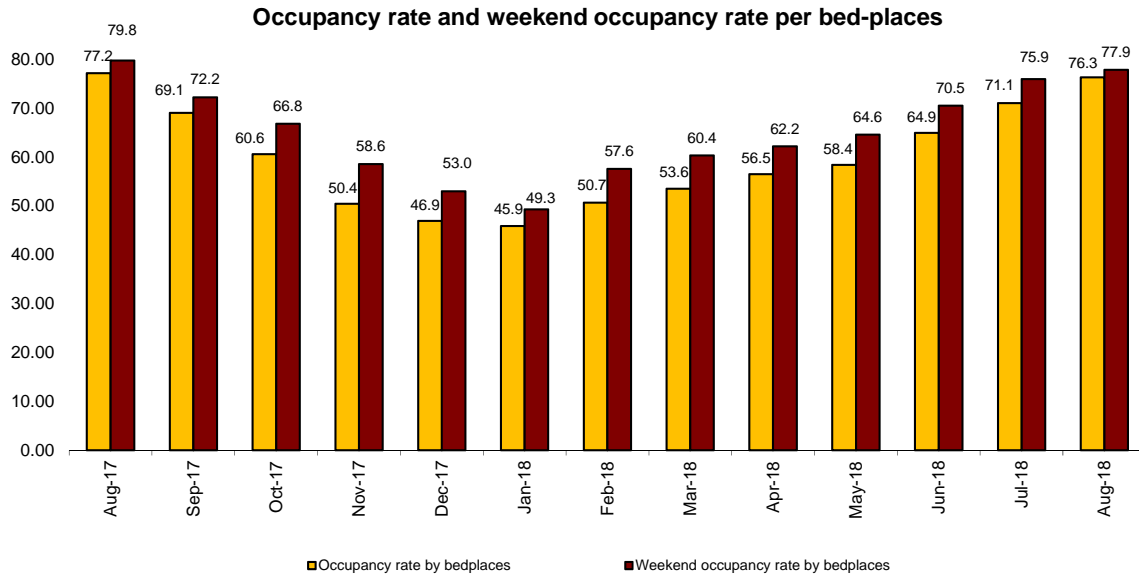


The main destination chosen by non-residents was Illes Balears, with 34.7% of total overnight stays. In this Autonomous Community, overnight stays by foreigners increased by 0.9% as compared to August 2017. The following destinations of non-residents were Cataluña (with 21.2% of the total overnight stays and a decrease of 3.5%) and Canarias (with 19.0% of the total and a decrease of 5.1%).

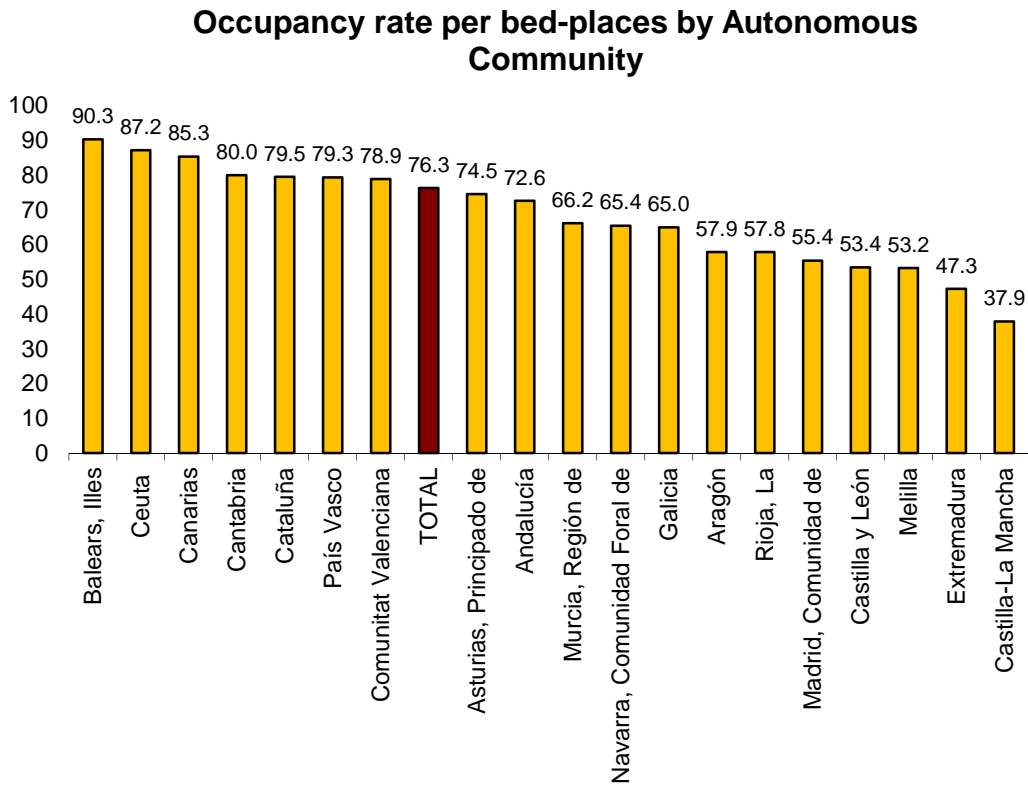


Hotel occupancy

In August, 76.3% of the available bed-places were covered, with an annual decrease of 1.1%. The weekend occupancy rate by bed-places decreased by 2.4%, standing at 77.9%.



Illes Balears showed the highest occupancy rate by bed-places during August (90.3%). It was followed by Canarias (85.3%) and Cantabria (80.0%).



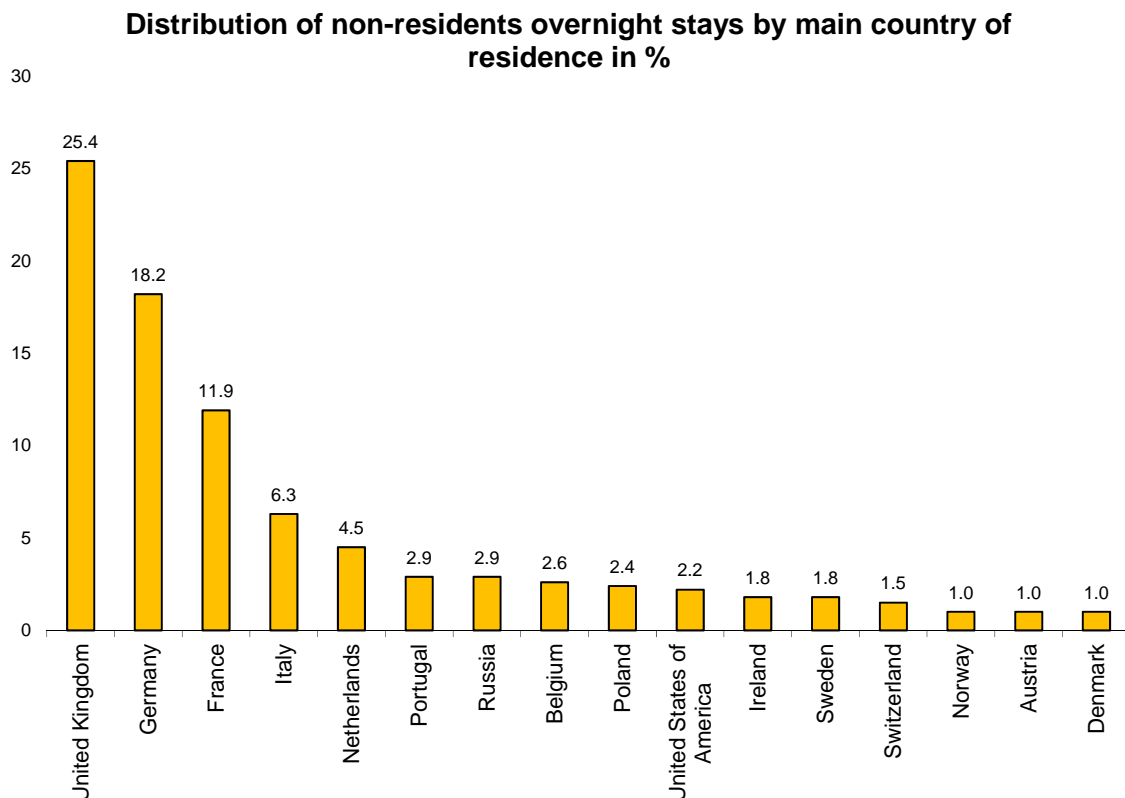
By tourist areas, the islands of Ibiza-Formentera reached the highest occupancy rate by bed-places (91.6%), and the Costa de Gipúzkoa registered the highest weekend occupancy rate (90.2%). The island of Mallorca registered the highest number of overnight stays, with 8.0 million.

The tourist sites with more overnight stays were Barcelona, Calvià and Madrid. Santa Margalida recorded the highest occupancy rate by bed-places (99.2%) and Muro the greatest weekend occupancy rate (95.5%).

Overnight stays according to the country of origin of the travellers

In August, travellers from the United Kingdom and Germany concentrated 25.4% and 18.2% of total overnight stays of non-residents in hotel establishments, respectively. The British market decreased by 4.0% and the German by 11.3%.

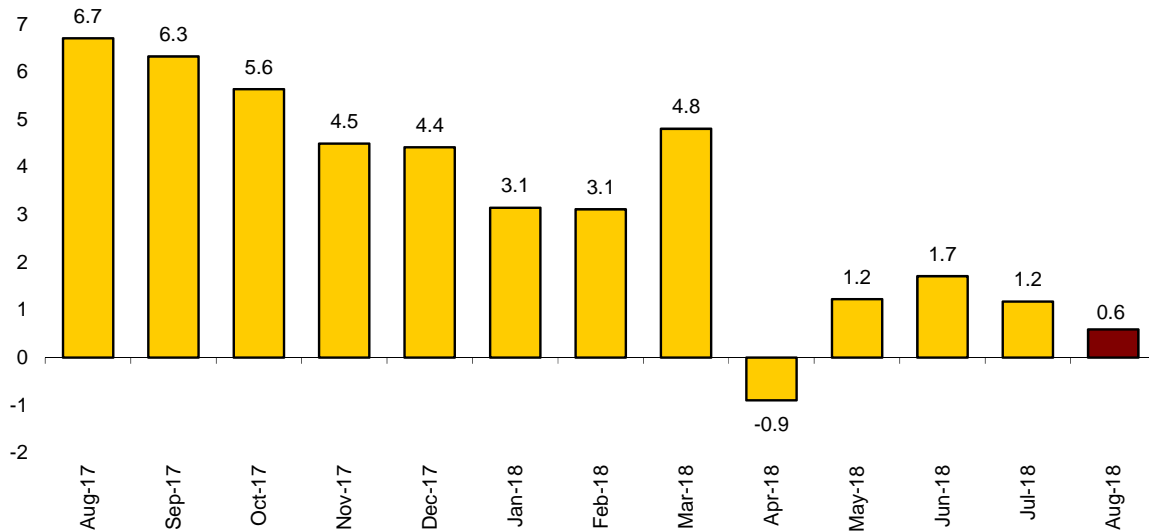
Overnight stays of travellers from France, Italy, and Netherlands (the following countries of origin) registered annual rates of 11.3%, 2.6% and -11.1% respectively.



Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 0.6% in August, which is 0.6 points less than that of the previous month and 6.1 points below that registered a year ago.

Hotel Prices Index. Annual variation rate



Illes Balears, Cataluña, Andalucía and Canarias were the most heavily weighted Autonomous Communities in the HPI in August (accounting for 76.7% of the total weight). Hotel prices increased by 2.3% in the annual rate in Illes Balears, 1.6% in Andalucía and 1.2% in Canarias. In turn, they fell by 4.5% in Cataluña.

By category, prices rose in one-silver-star hotels (6.3%), three and two-silver-star hotels (2.5%), three-gold-star hotels (2.4%), two-gold-star hotels (1.7%) and in one-gold-star hotels (0.6%).

In turn, prices fell by 0.5% in both five and four-star-gold hotels.

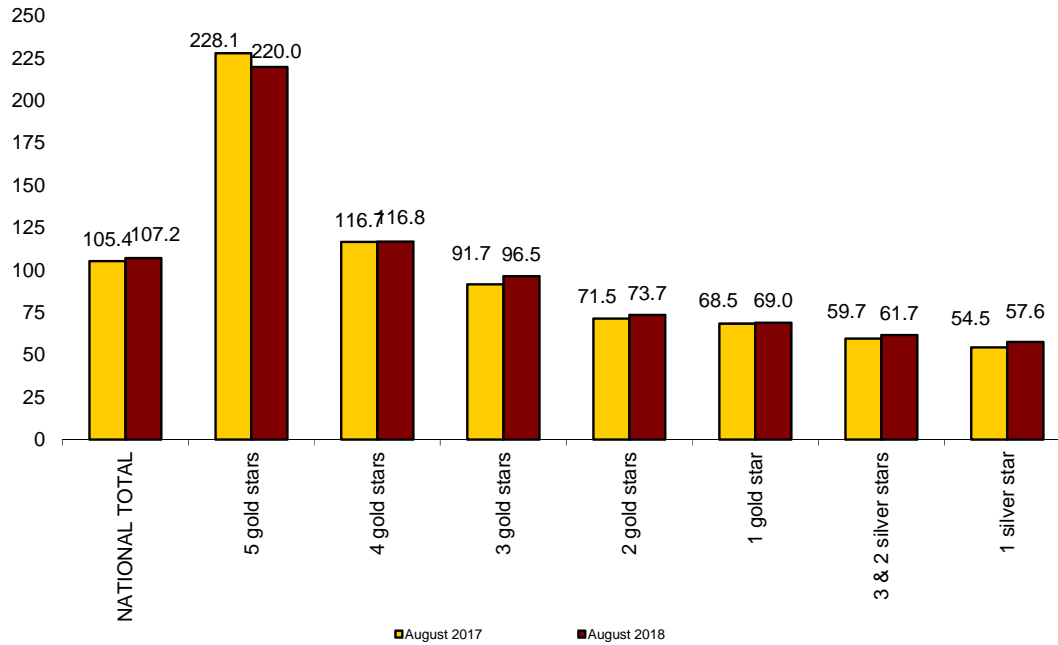
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 107.2 euros in August, indicating an increase of 1.7% as compared with the same month of 2017.

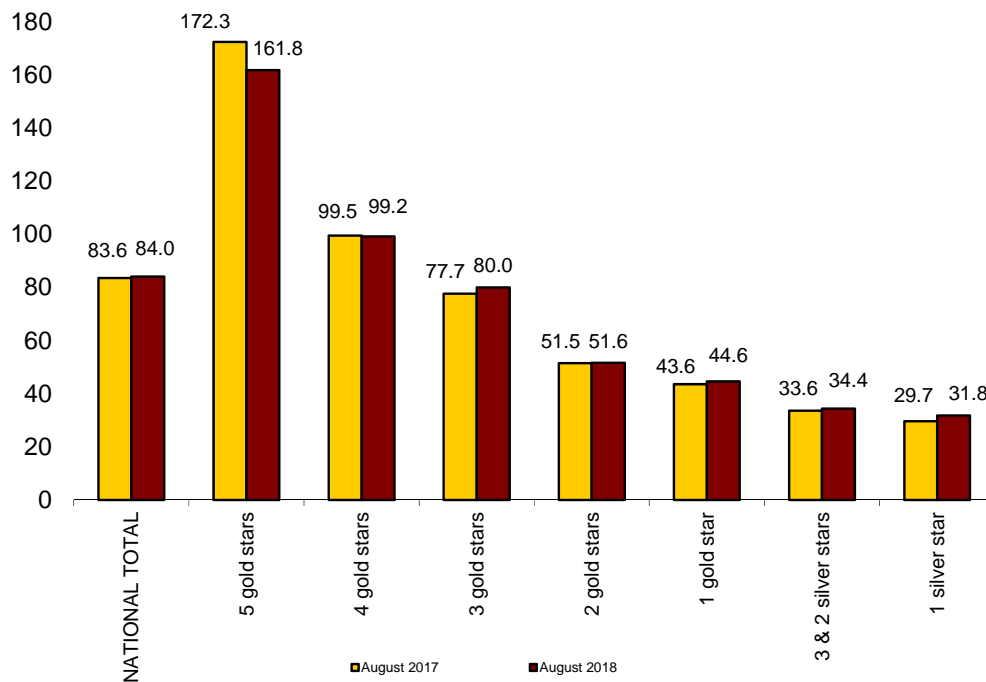
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 84.0 euros, with a 0.6% increase.

By category, the average rate was 220.0 euros for five-star hotels, 116.8 euros for four-star hotels and 96.5 euros for three-star hotels. Revenues per available room for these same categories were 161.8, 99.2 and 80.0 euros, respectively.

Average daily rate (ADR) by hotel category in euros



Revenue per available room (RevPAR) by hotel category in euros



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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

August 2018

Provisional Data

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	12.523.973	6.188.978	6.334.994	46.393.669	17.552.277	28.841.392	3,70
HOTELS: Golden stars							
Five	605.583	193.008	412.575	2.464.702	595.091	1.869.611	4,07
Four	5.500.512	2.558.219	2.942.294	22.490.321	8.068.842	14.421.479	4,09
Three	3.600.494	1.709.339	1.891.155	14.382.281	4.926.167	9.456.114	3,99
Two	1.090.630	655.358	435.271	2.924.726	1.522.874	1.401.852	2,68
One	447.528	280.992	166.536	1.119.862	670.135	449.727	2,50
INNS: Silver stars							
Two and three	703.535	470.729	232.806	1.539.256	992.988	546.267	2,19
One	575.691	321.334	254.357	1.472.521	776.180	696.341	2,56
Annual rate	1,50	3,66	-0,51	-0,56	2,87	-2,54	-2,04
Cumulative annual rate	0,73	0,89	0,58	-0,65	0,28	-1,13	-1,37

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	16.840	874.231	1.831.573	76,30	77,86	78,10	279.418
HOTELS: Golden stars							
Five	325	48.990	104.135	73,52	74,04	73,73	36.564
Four	2.634	378.005	822.343	81,72	82,91	84,54	135.528
Three	3.006	245.735	518.845	82,10	82,52	82,85	71.022
Two	2.196	70.225	138.124	66,59	70,85	69,73	14.381
One	1.409	30.502	59.593	59,68	64,41	63,18	5.656
INNS: Silver stars							
Two and three	3.285	50.973	96.999	50,47	54,80	54,08	8.546
One	3.985	49.800	91.535	50,87	54,20	55,64	7.720
Annual rate	-0,81	0,65	0,83	-1,14	-2,41	-0,97	1,60

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-pla	Of bed-places	Of bedrooms		
					at weekend				
Tourist area with a greater occupancy rate per month									
Islas de Ibiza-Formentera	52.860	300.505	211.786	1.707.792	91,64	89,34	89,55	5,43	11.526
Isla de Mallorca	92.888	1.116.657	425.993	7.592.528	90,32	89,33	90,99	6,63	46.249
Palma - Calvià	41.797	492.331	172.634	2.812.418	89,54	89,51	89,61	5,59	19.048
Costa de Gipuzkoa	38.979	47.306	99.126	107.394	89,11	90,23	93,42	2,39	1.354
Isla de Menorca	43.544	100.182	232.069	716.487	87,69	86,95	90,60	6,60	5.049
Isla de Fuerteventura	36.895	127.346	231.622	1.180.596	87,66	86,69	88,40	8,60	8.873
Sur de Gran Canaria	59.000	159.229	306.830	1.375.355	87,37	86,83	88,43	7,71	11.005
Sur de Tenerife	63.218	188.668	295.434	1.582.795	87,07	87,16	85,06	7,46	15.094

Tourist area with a greater number of overnight stays per month *

Costa del Sol	248.240	319.239	922.075	1.529.031	80	83	88	4	16.217
Isla de Tenerife	114.042	228.825	528.891	1.876.650	85	85	83	7	18.882
Costa Brava	224.316	343.651	713.433	1.537.738	82	81	83	4	10.645
Costa Blanca	298.272	193.562	1.200.922	984.554	84	84	86	4	10.653
Barcelona	104.667	674.555	206.883	1.964.567	81	83	86	3	15.218
Costa Daurada	222.915	232.689	734.439	1.280.749	86	86	87	4	7.378
Isla de Gran Canaria	76.141	172.212	360.829	1.438.597	85	85	86	7	11.851
Costa Barcelona	139.913	286.651	392.250	1.257.009	80	79	81	4	7.855

Tourist site with a greater occupancy rate per month

Santa Margalida	2.129	48.951	13.076	425.040	99,22	93,31	96,11	8,58	2.078
Manacor	7.266	69.264	40.565	569.061	97,71	92,59	92,73	7,97	2.676
Sant Antoni de Portmany	11.079	66.247	48.736	352.397	97,31	91,56	91,19	5,19	1.600
Muro	4.850	65.637	28.782	482.031	94,46	95,46	93,15	7,25	2.711
Santa Eulària des Riu	7.364	67.498	33.638	465.882	93,15	90,54	90,53	6,67	2.926
Cambrils	25.365	16.031	128.303	119.117	92,78	94,27	93,50	5,98	1.053
Salou	88.945	146.838	312.170	911.687	92,74	92,01	93,91	5,19	3.669
Formentera	6.664	22.281	28.098	129.229	91,84	86,53	89,85	5,44	941
Arona	14.918	56.151	82.176	494.327	91,27	89,62	87,84	8,11	3.433
Suances	10.135	1.212	34.335	3.188	90,98	91,90	90,42	3,31	215

Tourist site with a greater number of overnight stays per month *

Barcelona	92.119	644.076	181.798	1.888.478	81,97	83,80	85,95	2,81	14.571
Calvià	12.246	222.033	58.924	1.514.384	89,74	88,51	89,51	6,72	9.986
Madrid	299.649	430.408	505.290	981.285	55,87	58,59	61,01	2,04	11.098
Benidorm	150.400	104.956	701.817	672.478	84,37	83,34	86,20	5,38	6.184
Palma de Mallorca	34.707	269.424	133.040	1.212.029	90,55	92,52	91,11	4,42	8.168
San Bartolomé de Tirajana	43.042	110.870	234.255	994.539	89,66	87,93	88,66	7,98	8.429
Adeje	31.880	102.577	146.056	852.606	87,85	86,81	85,14	7,43	8.855
Lloret de Mar	36.755	137.160	140.420	780.837	87,18	84,40	88,69	5,30	3.367
Pájara	16.236	80.212	98.856	744.893	89,58	89,87	88,63	8,75	5.360
Sant Llorenç des Cardassar	3.537	85.296	13.948	708.910	90,84	87,27	90,69	8,14	3.950

*Sin 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	12.523.973	100,00	46.393.669	100,00
Residentes en España	6.188.978	49,42	17.552.277	37,83
Residentes en el extranjero	6.334.994	50,58	28.841.392	62,17
TOTAL residentes en el extranjero	6.334.994	100,00	28.841.392	100,00
TOTAL residentes en U.E. (sin España)	4.769.535	75,29	23.926.234	82,96
- Alemania	829.542	13,09	5.242.045	18,18
- Austria	57.769	0,91	293.756	1,02
- Bélgica	164.292	2,59	743.063	2,58
- Dinamarca	51.940	0,82	287.424	1,00
- Finlandia	22.277	0,35	85.209	0,30
- Francia	988.389	15,60	3.421.355	11,86
- Grecia	14.123	0,22	40.194	0,14
- Irlanda	97.839	1,54	520.387	1,80
- Italia	487.337	7,69	1.809.506	6,27
- Luxemburgo	13.199	0,21	66.770	0,23
- Países Bajos	252.749	3,99	1.298.442	4,50
- Polonia	110.318	1,74	677.503	2,35
- Portugal	250.091	3,95	845.929	2,93
- Reino Unido	1.162.430	18,35	7.326.599	25,40
- República Checa	37.415	0,59	211.431	0,73
- Suecia	96.405	1,52	513.203	1,78
- Resto de la UE*	133.421	2,11	543.418	1,88
Noruega	50.584	0,80	296.403	1,03
Rusia	136.364	2,15	833.312	2,89
Suiza	86.380	1,36	430.294	1,49
Resto de Europa	114.880	1,81	446.233	1,55
Japón	47.486	0,75	96.633	0,34
Estados Unidos	260.291	4,11	631.146	2,19
Resto de América	325.981	5,15	806.711	2,80
Países africanos	113.947	1,80	336.873	1,17
Resto del mundo	429.547	6,78	1.037.554	3,60

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

Indicators on the Profitability of the Hotel Sector

Agosto 2018

Provisional data

National ADR and RevPAR^(*) and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	107,18	1,68	84,04	0,58
Andalucía	120,58	2,75	93,99	4,67
Aragón	62,26	4,16	37,31	12,42
Asturias, Principado de	85,23	5,92	64,34	5,66
Balears, Illes	132,35	4,60	120,36	2,86
Canarias	100,50	0,50	86,15	-2,21
Cantabria	96,20	-0,22	78,52	2,77
Castilla y León	59,73	1,55	33,27	2,34
Castilla - La Mancha	55,01	0,62	22,37	5,17
Cataluña	109,68	-2,15	90,37	-4,54
Comunitat Valenciana	105,20	2,45	85,99	1,80
Extremadura	59,81	1,97	29,52	13,25
Galicia	71,04	3,69	47,22	1,29
Madrid, Comunidad de	69,96	-4,76	41,84	-10,59
Murcia, Región de	80,95	-0,99	54,93	3,40
Navarra, Comunidad Foral de	68,24	3,47	46,67	1,83
País Vasco	110,02	4,49	93,69	5,40
Rioja, La	63,68	0,02	38,93	-4,85
Ceuta	75,38	0,36	56,93	5,69
Melilla	70,86	7,46	46,10	-4,86

National ADR and RevPar^(*) and breakdown by categories

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	107,18	1,68	84,04	0,58
HOTELS: Gold stars				
Five	220,04	-3,52	161,80	-6,11
Four	116,83	0,13	99,15	-0,39
Three	96,53	5,30	79,98	2,99
Two	73,65	3,07	51,60	0,19
One	68,98	0,77	44,61	2,40
GUESTHOUSES: Silver stars				
Three and two	61,74	3,47	34,37	2,37
One	57,61	5,71	31,82	7,29

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

Hotel Price Index (HPI). 2008 Base

August 2018

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	120,48	0,59
Andalucía	111,61	1,57
Aragón	69,39	4,79
Asturias, Principado de	102,54	3,70
Balears, Illes	145,93	2,29
Canarias	125,27	1,15
Cantabria	106,23	3,18
Castilla y León	96,28	0,88
Castilla - La Mancha	88,70	1,21
Cataluña	119,61	-4,49
Comunitat Valenciana	117,14	2,22
Extremadura	97,63	2,97
Galicia	102,77	1,26
Madrid, Comunidad de	88,05	-0,01
Murcia, Región de	91,37	-0,60
Navarra, Comunidad Foral de	94,92	1,54
País Vasco	123,72	4,80
Rioja, La	93,73	1,04
Ceuta	105,26	0,06
Melilla	103,10	9,15

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	120,48	0,59
HOTELS: Gold stars		
Five	110,77	-0,51
Fourth	115,78	-0,51
Three	131,73	2,35
Two	117,66	1,71
One	125,53	0,57
HOSTALS: Silver stars		
Three and two	117,52	2,49
One	121,19	6,29