

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
October 2017. *Provisional data*

Overnight stays in hotel establishments register an increase of 1.1% in October, as compared to the same month of 2016

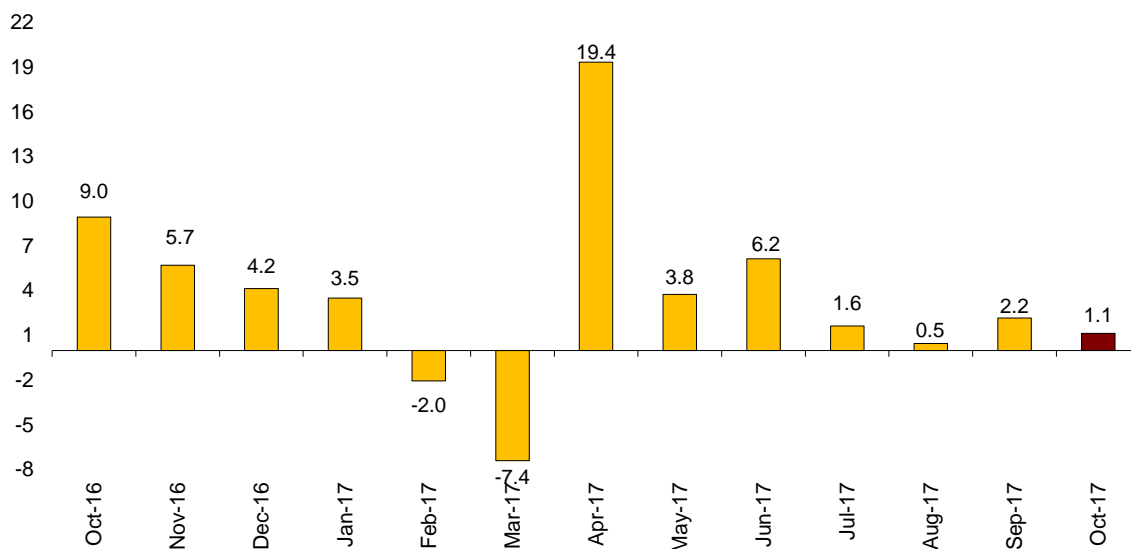
Hotels invoice an average of 81.9 euros per occupied room, representing an annual increase of 5.3%

During the month of October, more than 30 million overnight stays were registered in hotel establishments, 1.1% more than in the same month of 2016. The overnight stays by travellers resident in Spain decreased by 2.2%, while those of non-residents increased by 2.6%.

The average stay decreased 0.9% as compared with October 2016, and stood at 3.3 overnight stays per traveller.

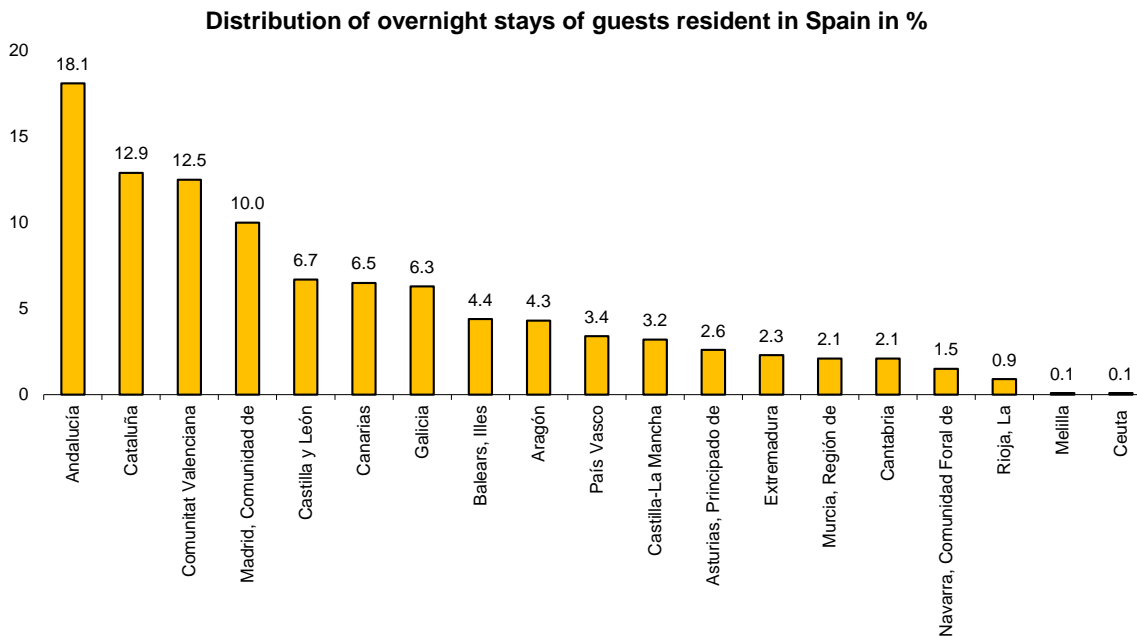
During the first ten months of 2017, overnight stays increased 2.8%, as compared to the same period of the previous year.

Annual rates of overnight stays in %

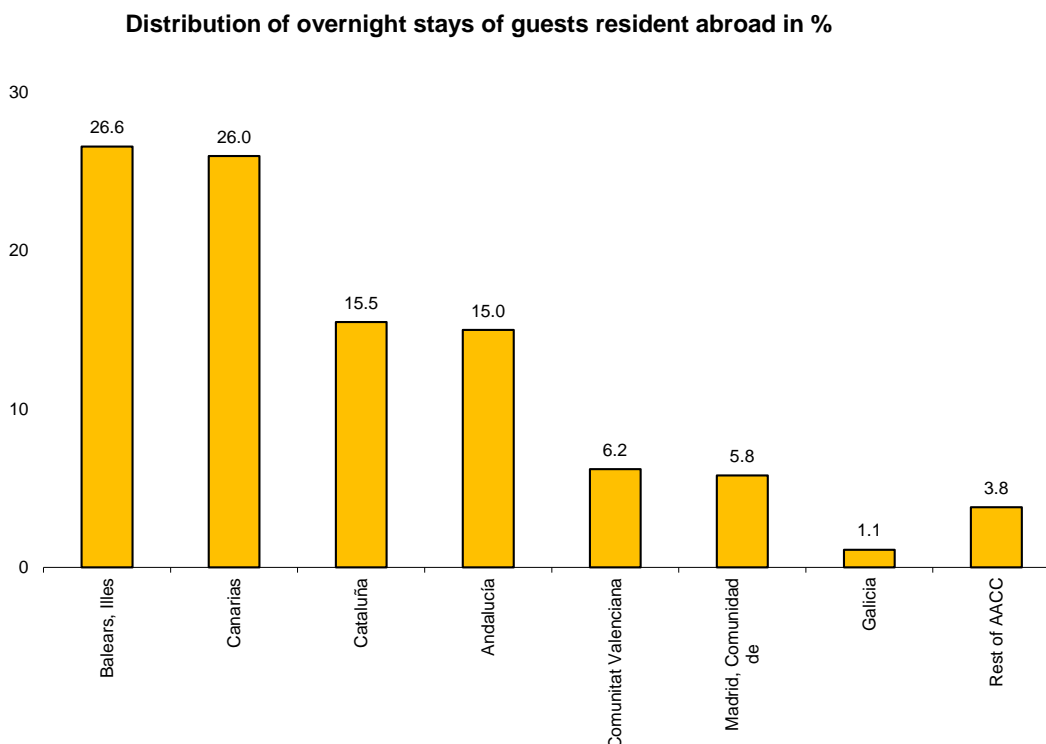


Destinations

In October, Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of travellers resident in Spain, with annual variation rates for overnight stays of -5.9%, -2.0%, -3.5% and -4.0%, respectively.



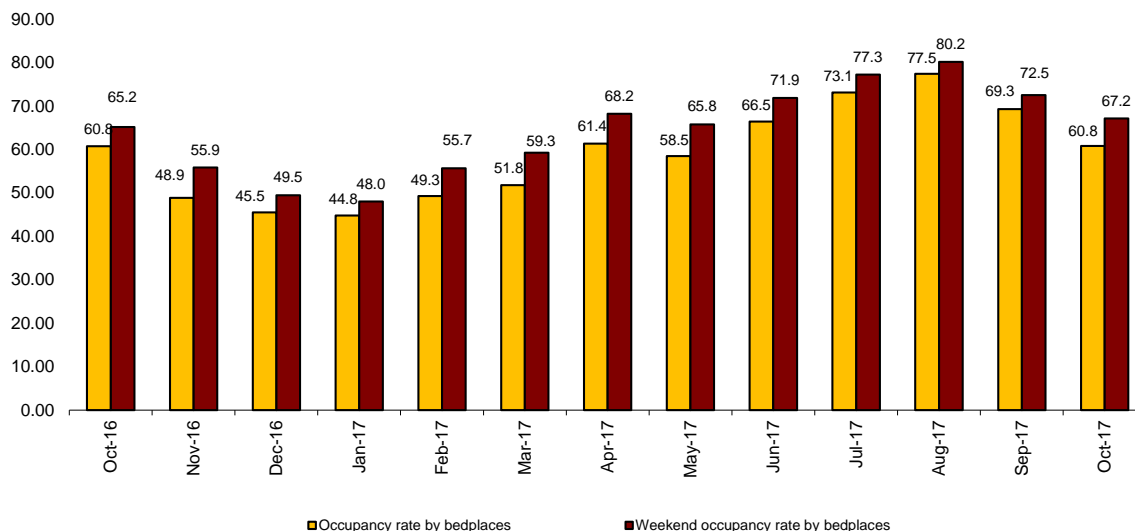
The main destination chosen by non-residents travellers was Illes Balears, with 26.6% of total overnight stays. In this Autonomous Community, overnight stays of foreigners increased by 3.7% as compared to October 2016. The following destinations of non-residents were Canarias (with 26.0% of the total overnight stays and an increase of 1.4%) and Cataluña (with 15.5% of the total and an increase of 2.9%).



Hotel occupancy

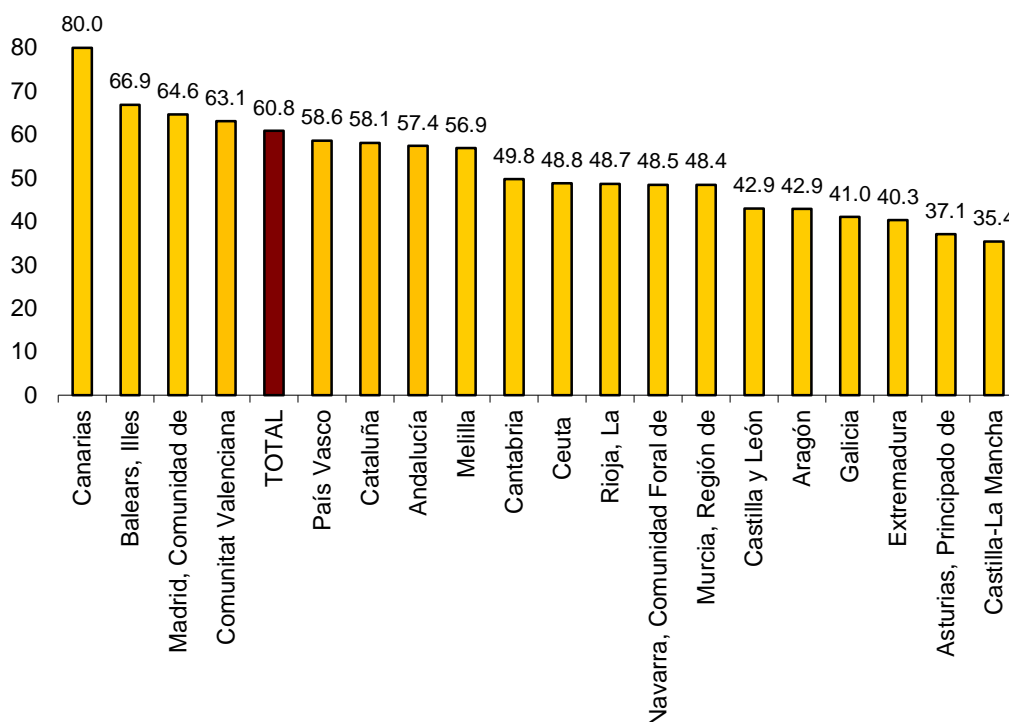
In October, 60.8% of the available bedplaces were occupied, indicating an annual increase of 0.1%. The weekend occupancy rate by bedplaces increased 3.1%, and stood at 67.2%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias showed the highest occupancy rate by bedplaces in October (80.0%). It is followed by Illes Balears (66.9%) and Comunidad de Madrid (64.6%).

Occupancy rate by bedplaces by Automous Community



By tourist area, Sur de Gran Canaria registered the highest occupancy rate by bedplaces (83.1%), and Costa Gipuzkoa registered the highest weekend occupancy rate (85.2%). The island of Mallorca registered the highest number of overnight stays, with more than 4.9 million.

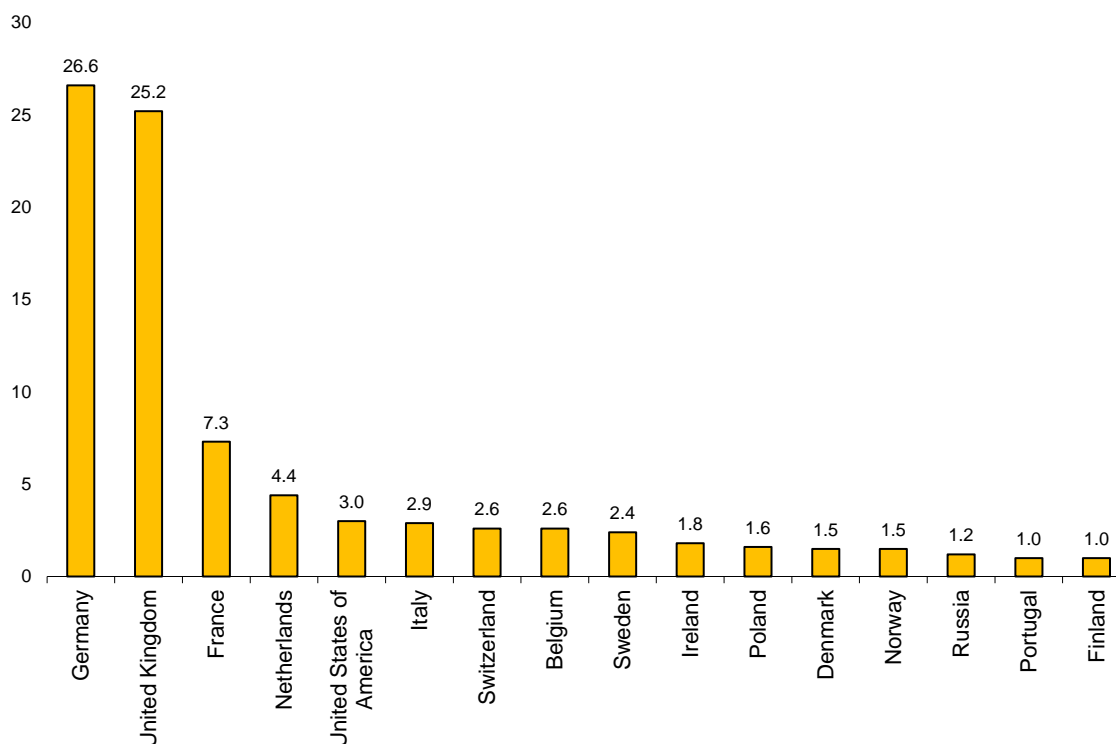
The tourist spots with more overnight stays were Madrid, Barcelona and Palma de Mallorca. San Bartolomé de Tirajana registered the highest occupancy by bedplaces (85.5%) and Adeje the highest occupation at the weekend (85.5%).

Overnight stays according to the country of origin of the travellers

Travellers from the Germany and United Kingdom accounted for 26.6% and 25.2%, respectively, of total overnight stays of non-residents in hotel establishments in October. The German market increased by 2.1% annually and the British decreased by 2.7%.

Overnight stays of travellers from France, the Netherlands and the United States (the following countries of origin) registered annual rates of -7.2%, 17.6% and 14.5%, respectively.

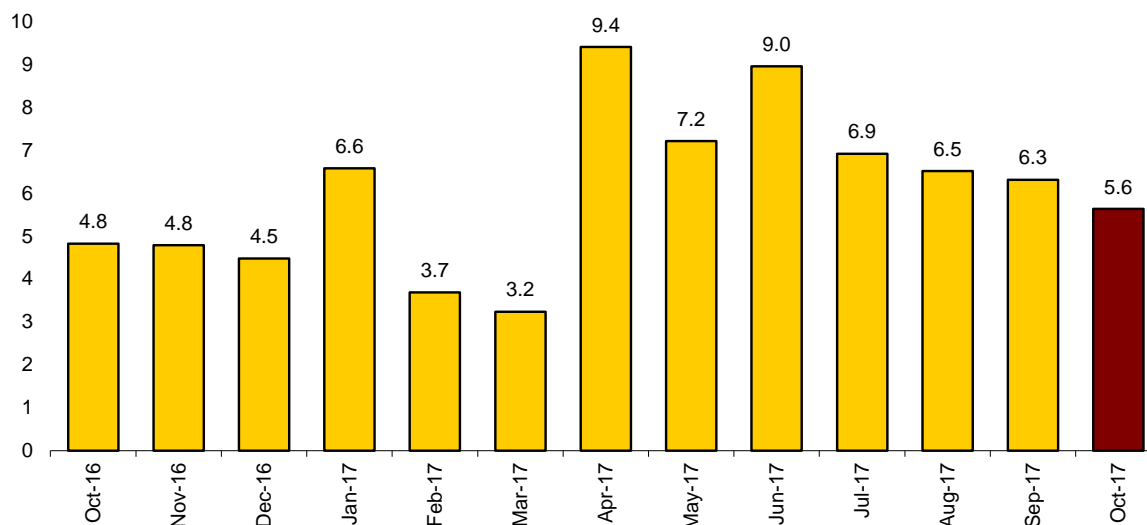
Distribution of overnight stays of residents abroad from the main countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 5.6% in October, which was 0.7 points lower than that registered in the previous month and 0.8 points higher than that registered one year ago.

Hotel Prices Index. Annual variation rate



In October, Cataluña, Canarias, Illes Balears and Andalucía were the Autonomous Communities with the greatest weighting in the HPI (they represented 71.2% of the total load). Hotel prices increased by 10.8% in the annual rate in Illes Balears, 6.3% in Canarias and 5.6% in Andalucía. In turn, they decreased by 0.5% in Cataluña.

By hotel category, hotel prices increased in all of them. In three-gold-star establishments (8.7%), in one-silver-star establishments (8.1%), in four-gold-star establishments (5.3%), in two-gold-star establishments (5.0%), in three-silver-star and in two-silver-star establishments (4.2%), in one-gold-star establishments (3.8%) and in five-gold-star establishments (2.6%).

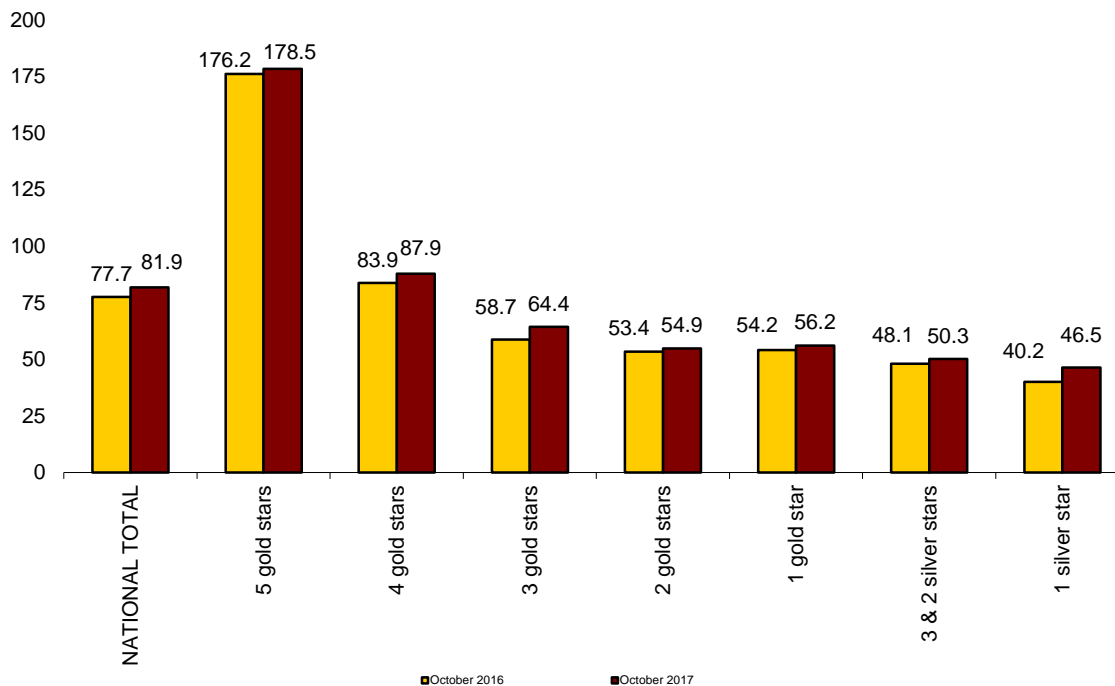
Profitability of the Hotel Sector

The daily average invoicing of hotels per occupied room (ADR) in October was 81.9 euros, which represented an increase of 5.3% as compared to the same month of 2016.

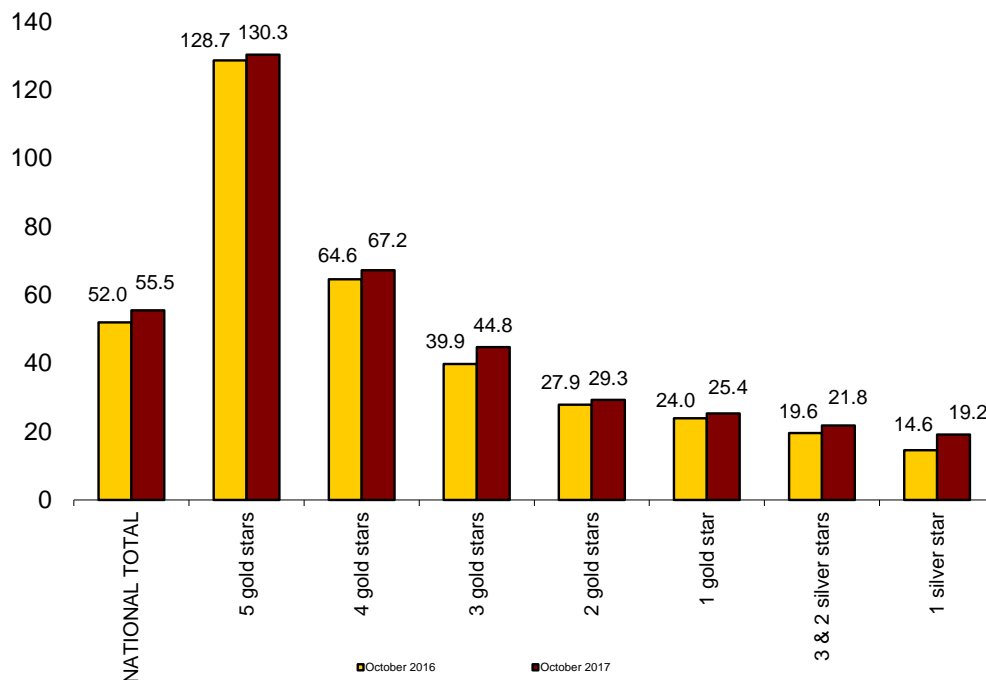
Meanwhile, the average daily income per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 55.5 euros, with an increase of 6.7%.

By category, the average invoicing was 178.5 euros for five-star hotels, 87.9 euros for four-star hotels and 64.4 euros for three-star hotels. Income per available room for these same categories were 130.3, 67.2 and 44.8 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)

October 2017

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	9,461,838	4,296,732	5,165,106	30,936,781	9,235,163	21,701,619	3.27
HOTELS: Golden stars							
Five	552,153	156,855	395,298	1,956,914	328,268	1,628,646	3.54
Four	4,524,699	1,852,112	2,672,587	15,892,447	3,961,821	11,930,626	3.51
Three	2,506,213	1,148,865	1,357,348	9,008,451	2,721,568	6,286,883	3.59
Two	690,637	434,103	256,534	1,598,550	856,018	742,532	2.31
One	277,049	169,726	107,323	576,765	318,181	258,584	2.08
INNS: Silver stars							
Two and three	494,391	306,128	188,263	1,004,846	576,597	428,249	2.03
One	416,697	228,945	187,753	898,808	472,710	426,098	2.16
Annual rate	2.02	-1.42	5.06	1.14	-2.19	2.63	-0.86
Cumulative annual rate	3.53	0.74	6.17	2.80	0.17	4.15	-0.70

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	15,174	773,339	1,609,459	60.84	67.18	68.14	228,942
HOTELS: Golden stars							
Five	310	47,034	99,070	62.53	69.60	71.91	32,630
Four	2,412	347,045	748,271	67.08	73.09	76.56	114,155
Three	2,630	206,800	433,920	65.61	70.24	71.42	54,647
Two	1,897	56,549	109,657	46.49	57.11	53.40	10,318
One	1,152	24,796	48,560	38.16	48.52	45.20	4,032
INNS: Silver stars							
Two and three	3,010	46,056	87,538	36.79	45.94	42.43	7,132
One	3,763	45,057	82,443	35.03	41.54	41.69	6,028
Annual rate	-0.02	0.52	0.94	0.08	3.06	0.62	5.35

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									
Sur de Gran Canaria	20,104	185,213	102,770	1,460,166	83.11	83.84	90.44	7.61	11,239
Sur de Tenerife	27,579	209,336	127,225	1,560,297	81.82	83.96	85.79	7.12	14,461
Isla de Lanzarote	16,467	115,874	80,649	883,838	81.64	82.83	91.38	7.29	6,772
Isla de Fuerteventura	16,197	151,429	70,142	1,243,376	81.05	81.39	88.25	7.84	8,873
Isla de Gran Canaria	43,857	204,524	159,576	1,530,404	81.01	82.20	88.85	6.80	12,228
Isla de Tenerife	63,740	253,721	264,893	1,869,325	79.53	81.83	83.47	6.72	17,994
Costa Blanca	164,923	191,427	619,985	964,634	73.65	80.00	78.88	4.45	9,602
Costa Gipuzkoa	36,604	41,692	67,362	84,080	69.45	85.23	78.43	1.93	1,231

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

Isla de Mallorca	82,751	715,532	235,826	4,717,202	68.88	67.31	73.36	6.20	34,110
Costa del Sol	135,017	336,920	321,487	1,574,223	68.04	72.03	79.85	4.02	13,523
Palma - Calvià	39,266	308,355	122,021	1,738,315	69.37	72.15	75.76	5.35	13,266
Barcelona	134,458	554,118	255,941	1,486,910	67.41	71.65	80.24	2.53	14,951
Costa Barcelona	135,796	195,928	280,609	648,917	60.93	61.54	71.22	2.80	5,542
Costa Brava	90,684	178,496	199,250	676,391	51.95	61.83	57.62	3.25	6,131
Islas de Ibiza-Formentera	32,349	125,706	91,954	772,705	65.68	61.66	67.46	5.47	7,201
Costa Daurada	122,227	111,130	249,289	515,172	59.51	69.36	65.85	3.28	3,904

Tourist site with a greater occupancy rate per month

San Bartolomé de Tirajana	17,157	135,743	81,985	1,084,909	85.47	85.15	91.35	7.63	8,852
Adeje	11,269	111,055	54,895	842,497	84.17	85.52	87.06	7.34	8,207
Pájara	7,005	90,657	33,961	777,438	84.08	83.62	87.93	8.31	5,359
Yaiza	7,228	56,445	39,161	422,378	83.16	83.66	90.88	7.25	3,518
Tías	2,565	32,544	14,987	251,420	82.61	85.27	94.08	7.59	1,636
Arona	5,520	63,169	29,362	477,171	81.09	84.16	85.58	7.37	3,453
Benidorm	76,129	102,537	418,197	639,900	80.19	84.27	83.46	5.92	5,637
Puerto de La Cruz	21,179	32,810	100,014	258,174	79.81	81.00	81.14	6.63	2,624
Antigua	3,006	26,605	11,165	192,263	79.21	74.98	90.35	6.87	1,205
Teguise	3,753	24,732	19,562	198,618	78.67	78.69	90.59	7.66	1,494

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

Madrid	366,760	493,185	636,593	1,121,497	66.77	74.60	82.29	2.04	11,796
Barcelona	126,154	530,076	239,293	1,431,144	68.44	72.49	80.93	2.55	14,168
Palma de Mallorca	35,236	180,629	112,229	853,699	73.00	81.67	79.34	4.47	6,227
Calvià	5,735	126,691	15,227	857,299	66.62	65.75	72.87	6.59	6,419
Sevilla	91,045	163,136	170,274	349,565	75.76	85.07	86.49	2.05	3,502
Sant Llorenç des Cardassar	1,905	64,954	4,208	497,100	67.43	58.87	72.49	7.50	3,576
Torremolinos	22,201	72,218	67,288	431,851	77.88	81.09	84.73	5.29	2,832
Lloret de Mar	25,714	77,915	80,570	371,637	65.68	71.53	71.19	4.36	2,230
Salou	45,224	60,980	96,904	344,597	68.17	70.75	72.74	4.16	1,756
Alcúdia	3,763	56,977	7,077	422,111	69.81	68.61	71.34	7.07	2,542

* Not taken into account those included in the preceding table because they are in the bigger occupancy rate tables too.

4. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	9,461,838	100.00	30,936,781	100.00
Residents in Spain	4,296,732	45.41	9,235,163	29.85
Residents abroad	5,165,106	54.59	21,701,619	70.15
Total Residents abroad	5,165,106	100.00	21,701,619	100.00
Total Residents in E.U. (without Spain)	3,625,311	70.19	17,697,366	81.55
- Germany	895,390	17.34	5,780,506	26.64
- Austria	44,344	0.86	177,123	0.82
- Belgium	122,416	2.37	565,914	2.61
- Denmark	71,261	1.38	333,468	1.54
- Finland	47,484	0.92	224,993	1.04
- France	527,397	10.21	1,586,815	7.31
- Greece	11,318	0.22	30,672	0.14
- Ireland	86,833	1.68	383,166	1.77
- Italy	217,225	4.21	627,984	2.89
- Luxembourg	7,346	0.14	34,364	0.16
- Netherlands	210,015	4.07	953,773	4.39
- Poland	75,498	1.46	335,539	1.55
- Portugal	107,596	2.08	225,511	1.04
- United Kingdom	957,941	18.55	5,462,563	25.17
- Czech Republic	16,927	0.33	79,127	0.36
- Sweden	114,794	2.22	522,507	2.41
- Other EU countries*	111,527	2.16	373,342	1.72
Norway	65,353	1.27	332,328	1.53
Russia	63,309	1.23	264,502	1.22
Switzerland	123,463	2.39	571,974	2.64
Rest of Europe	90,733	1.76	286,432	1.32
Japan	54,580	1.06	100,312	0.46
United States of America	290,234	5.62	656,091	3.02
Rest of America	356,236	6.90	797,438	3.67
Africa	52,652	1.02	130,293	0.60
Other countries	443,234	8.58	864,883	3.99

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

Hotel Price Index (HPI). 2008 Base

October 2017

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	108.16	5.64
Andalucía	105.92	5.55
Aragón	82.52	0.86
Asturias, Principado de	88.06	3.49
Balears, Illes	122.02	10.84
Canarias	123.54	6.33
Cantabria	96.38	8.33
Castilla y León	92.53	2.93
Castilla - La Mancha	87.58	0.98
Cataluña	106.53	-0.48
Comunitat Valenciana	106.58	8.68
Extremadura	91.74	3.33
Galicia	96.75	0.40
Madrid, Comunidad de	93.80	9.61
Murcia, Región de	83.68	6.92
Navarra, Comunidad Foral de	88.23	3.57
País Vasco	106.89	2.00
Rioja, La	93.54	-0.46
Ceuta	80.71	-4.82
Melilla	95.49	-1.36

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	108.16	5.64
HOTELS: Gold stars		
Five	100.21	2.62
Fourth	107.81	5.27
Three	113.28	8.74
Two	106.98	5.02
One	109.03	3.81
HOSTALS: Silver stars		
Three and two	102.48	4.22
One	106.36	8.10

Indicators on the Profitability of the Hotel Sector

October 2017

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	81.86	5.34	55.50	6.68
Andalucía	78.07	5.52	53.43	7.93
Aragón	54.43	-2.63	27.61	7.27
Asturias, Principado de	57.57	6.90	24.96	0.48
Balears, Illes	77.80	8.53	52.25	10.05
Canarias	98.18	7.93	85.37	6.87
Cantabria	61.02	13.05	33.62	21.61
Castilla y León	58.33	2.81	28.79	6.00
Castilla - La Mancha	54.83	-1.54	23.04	3.63
Cataluña	93.41	-0.39	63.22	-2.84
Comunitat Valenciana	68.19	5.94	47.49	8.17
Extremadura	57.69	-1.02	26.58	9.23
Galicia	55.90	-0.87	26.04	6.40
Madrid, Comunidad de	95.40	11.26	75.86	12.99
Murcia, Región de	59.15	6.59	33.54	12.29
Navarra, Comunidad Foral de	63.99	8.74	36.70	9.33
País Vasco	84.02	1.12	60.02	4.61
Rioja, La	64.68	1.65	36.97	-7.70
Ceuta	66.26	-4.13	35.18	-12.44
Meiilla	65.28	2.73	48.10	22.96

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	81.86	5.34	55.50	6.68
HOTELS: Gold stars				
Five	178.48	1.31	130.34	1.30
Four	87.89	4.79	67.22	4.04
Three	64.38	9.60	44.75	12.30
Two	54.87	2.66	29.30	4.89
One	56.18	3.68	25.37	5.80
GUESTHOUSES: Silver stars				
Three and two	50.27	4.43	21.79	11.43
One	46.48	15.73	19.18	31.74

(*) ADR: Average Daily Rate
RevPAR: Revenue per Available Room