

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

Overnight stays in hotel establishments register an increase of 2.1% in November, as compared with the same month of 2016

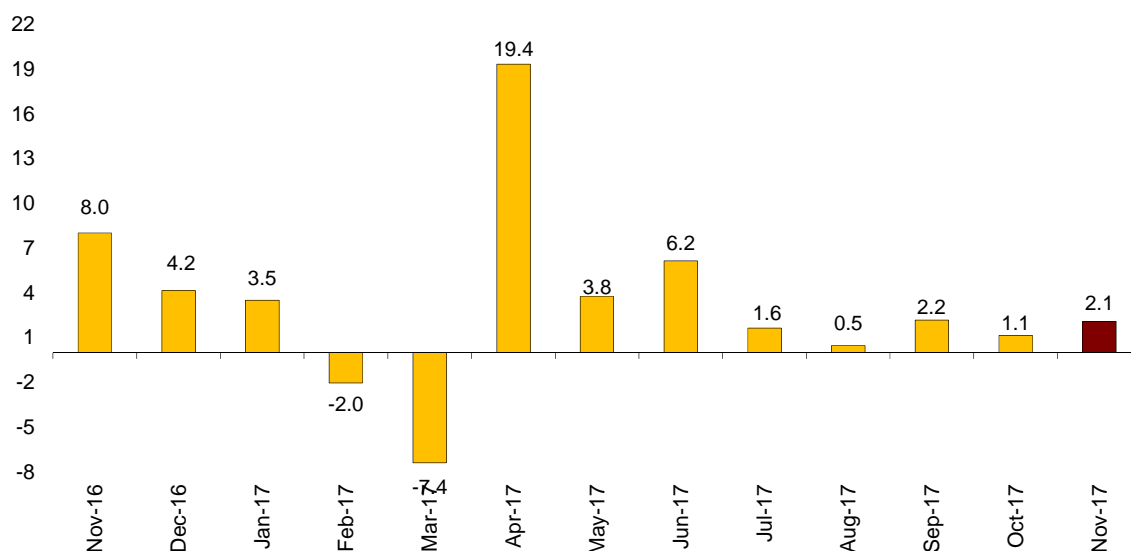
Hotels invoice an average of 79.6 euros per occupied room, representing an annual increase of 4.0%

During the month of November, more than 17 million overnight stays were registered in hotel establishments, 2.1% more than in the same month of 2016. Overnight stays by travellers resident in Spain increased by 3.5% and those of non-residents did so by 1.3%.

The average stay decreased 2.7% as compared with November 2016, standing at 2.9 overnight stays per traveller.

During the first 11 months of 2017, overnight stays increased 2.8%, as compared with the same period of the previous year.

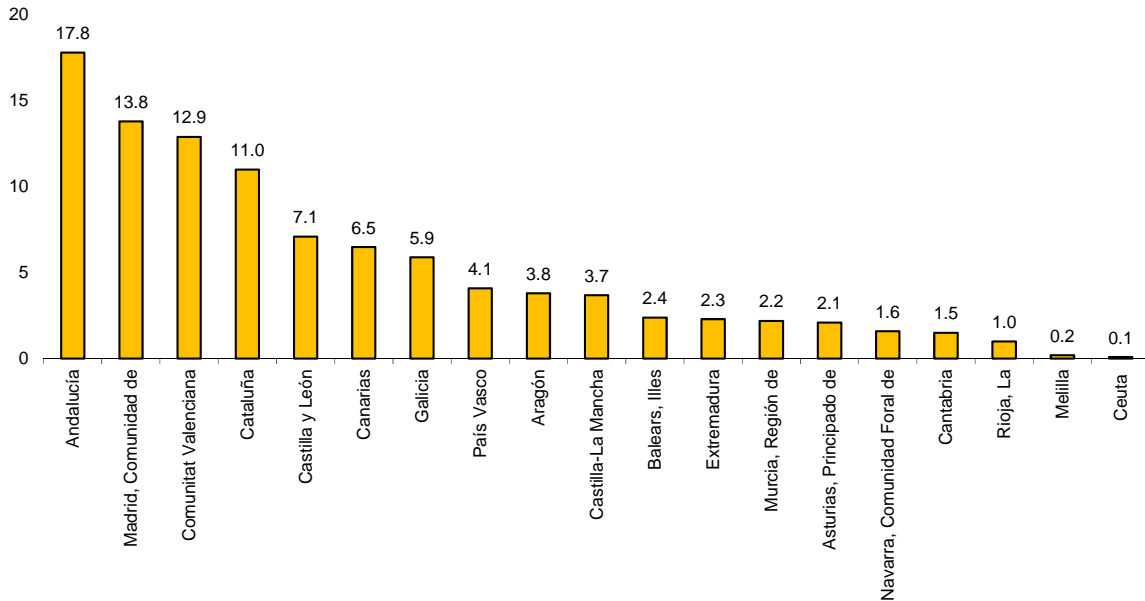
Annual rates of overnight stays in %



Destinations

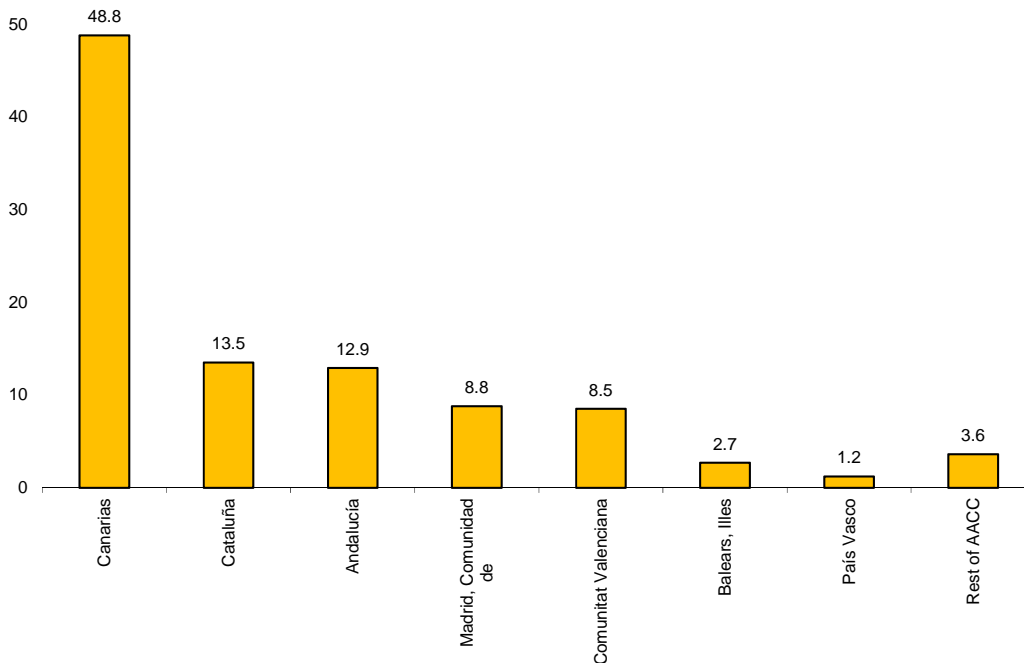
Andalucía, Comunidad de Madrid, Comunitat Valenciana and Cataluña were the main destinations of travellers resident in Spain in November, with annual variation rates in the number of overnight stays of 2.1%, 5.2%, 0.6% and -4.1%, respectively.

Distribution of overnight stays of guests resident in Spain in %



The main destination chosen by non-residents was Canarias, with 48.8% of total overnight stays. In this Autonomous Community, overnight stays of foreigners increased by 0.4% as compared with November 2016. The following destinations of non-residents were Cataluña (with 13.5% of the total overnight stays and a decrease of 7.3%) and Andalucía (with 12.9% of the total and an increase of 5.7%).

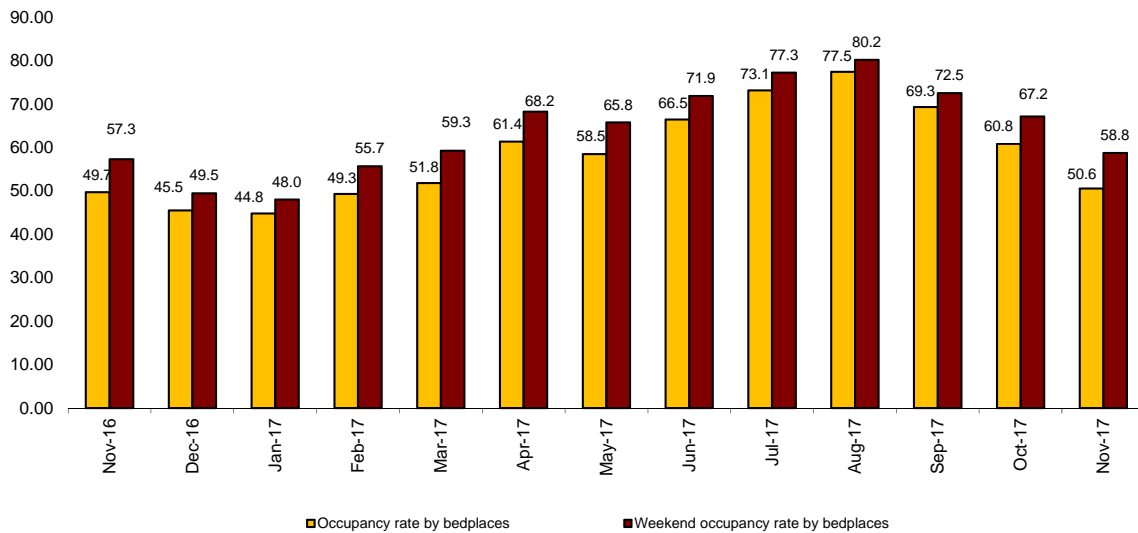
Distribution of overnight stays of guests resident abroad in %



Hotel occupancy

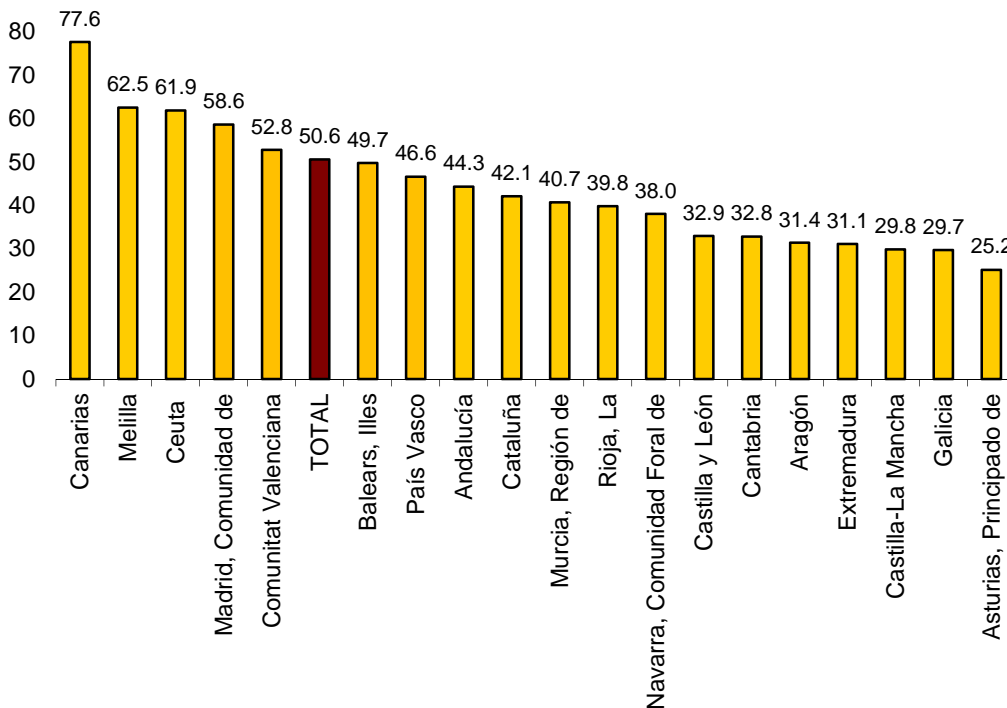
In November, 50.6% of the available bedplaces were occupied, indicating an annual increase of 1.7%. The weekend occupancy rate by bedplaces increased 2.5%, and stood at 58.8%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias showed the highest occupancy rate by bedplaces in November (77.6%). It was followed by Comunidad de Madrid (58.6%) and Comunitat Valenciana (52.8%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, the South of Gran Canaria reached both the highest occupancy rate by bedplaces (80.8%), and the highest weekend occupancy rate (82.3%). The island of Tenerife registered the highest number of overnight stays, with more than 1.9 million.

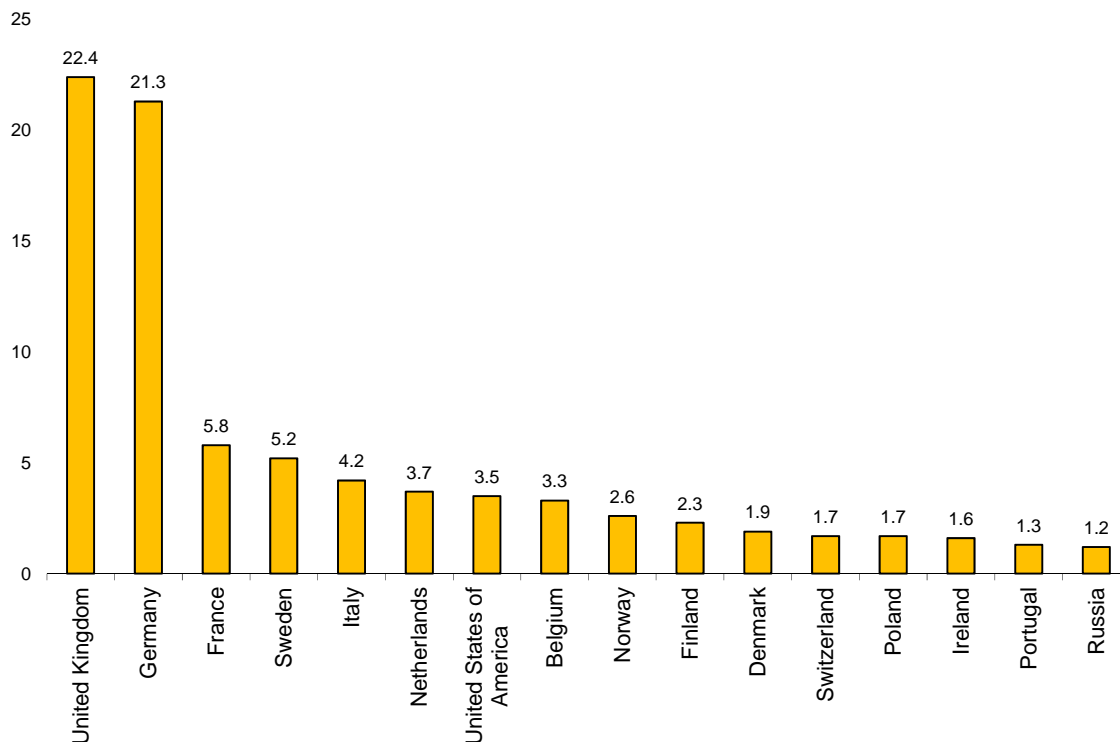
The tourist spots with more overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. The latter presented both the highest occupancy rate by bedplaces (82.1%), as the highest weekend occupancy rate (83.7%).

Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany accounted for 22.4% and 21.3%, respectively, of total overnight stays of non-residents in hotel establishments. The British market fell by 3.4%, while the German rose by 1.0%.

Overnight stays by travellers from France, Sweden and Italy (the following issuing markets) recorded annual rates of 1.4%, -3.2% and -1.1%, respectively.

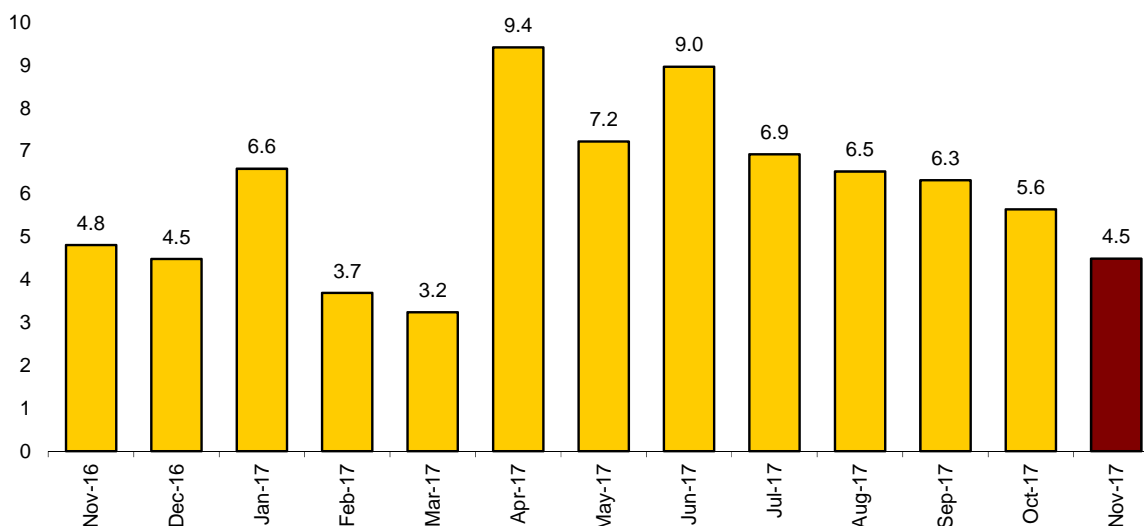
Distribution of overnight stays of residents abroad from the main countries in %



Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 4.5% in November, which is 1.1 points less than the previous month and 0.3 points below that registered a year ago.

Hotel Prices Index. Annual variation rate



In November, Canarias, Cataluña, Comunidad de Madrid and Andalucía were the Autonomous Communities with the greatest weighting in the HPI (they represented 76.7% of the total weight). Hotel prices increased by 8.3% in the annual rate in Comunidad de Madrid, 6.6% in Canarias and 2.7% in Andalucía. In turn, they decreased by 0.5% in Cataluña.

By category, hotel prices increased in all of them. In one-gold-star establishments (9.6%), in three-gold-star establishments (6.3%), in one-silver-star establishments (4.8%), in four-gold-star (4.5%), in three and two-silver-star establishments (3.8%), in two-gold-star establishments (2.8%) and in five-gold-star establishments (2.1%).

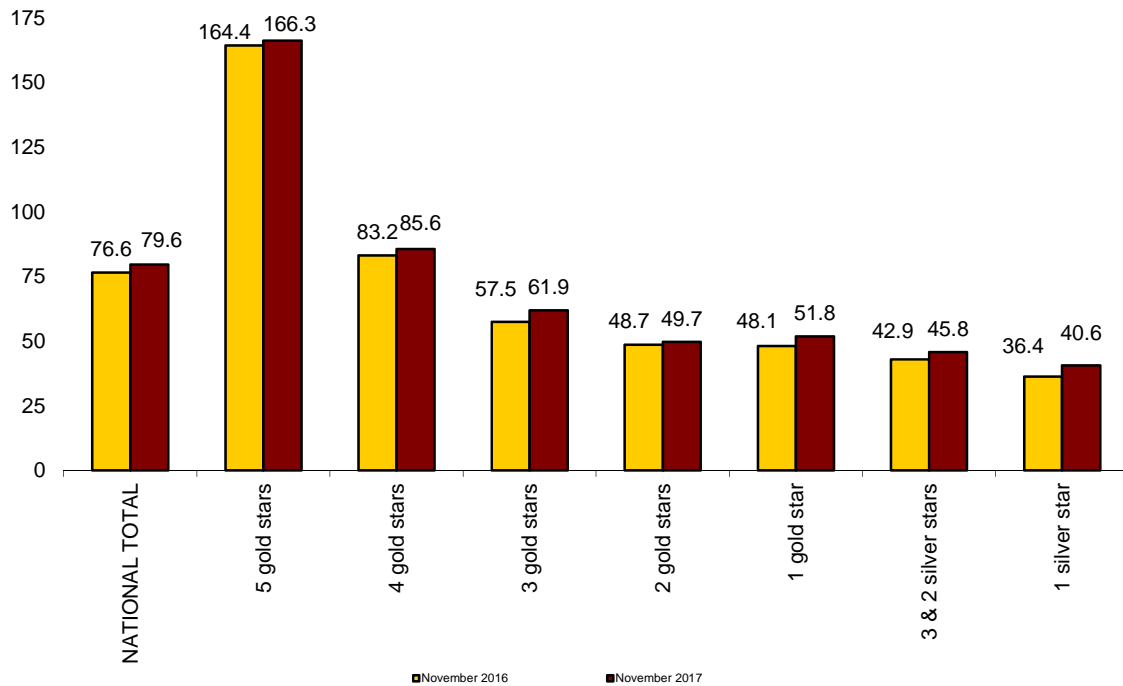
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 79.6 euros in November, representing an increase of 4.0% as compared with the same month of 2016.

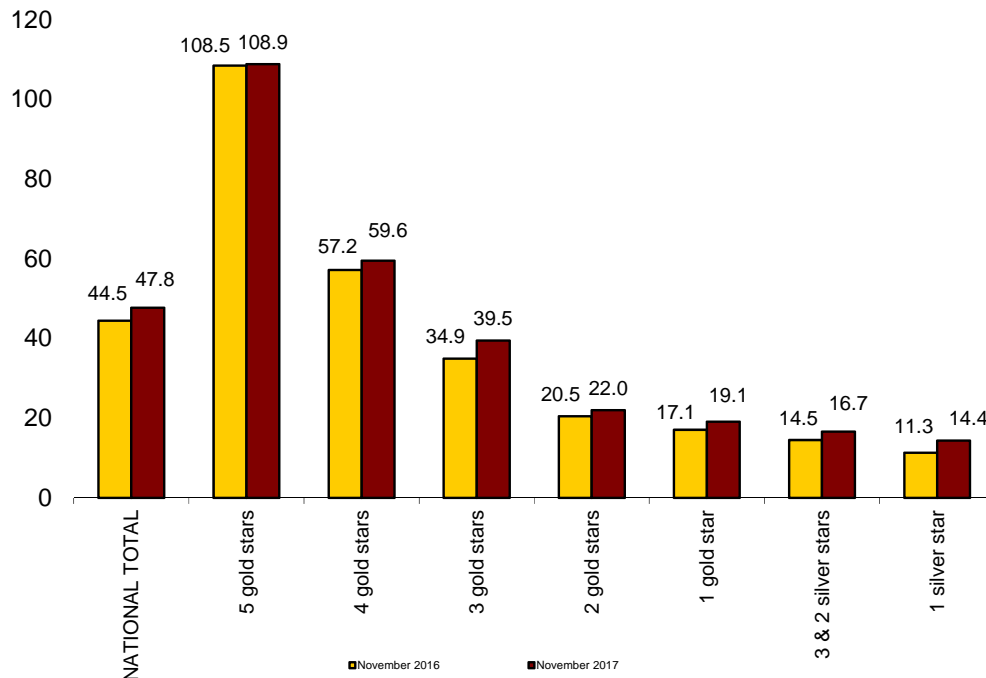
Meanwhile, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 47.8 euros, with an increase of 7.3%.

By category, the average invoicing was 166.3 euros for five-star hotels, 85.6 euros for four-star hotels and 61.9 euros for three-star hotels. Income per available room for these same categories were 108.9, 59.6 and 39.5 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)

November 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	6,070,978	3,322,024	2,748,955	17,492,340	6,701,111	10,791,228	2.88
HOTELS: Golden stars							
Five	382,080	129,238	252,842	1,310,659	248,503	1,062,156	3.43
Four	2,937,365	1,475,413	1,461,952	9,110,164	2,904,464	6,205,701	3.10
Three	1,489,520	855,787	633,732	4,437,577	1,893,693	2,543,884	2.98
Two	451,978	312,584	139,394	967,029	582,646	384,383	2.14
One	185,134	128,858	56,276	370,417	225,828	144,588	2.00
INNS: Silver stars							
Two and three	354,354	246,227	108,127	693,826	465,664	228,161	1.96
One	270,548	173,917	96,630	602,669	380,313	222,355	2.23
Annual rate	4.91	4.26	5.71	2.09	3.47	1.25	-2.69
Cumulative annual rate	3.61	0.98	6.15	2.76	0.37	4.00	-0.82

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	12,827	559,002	1,143,150	50.55	58.76	60.26	161,298
HOTELS: Golden stars							
Five	254	39,124	80,677	53.69	62.79	64.50	25,997
Four	1,867	245,678	518,805	57.97	66.31	70.44	79,443
Three	2,012	127,056	265,984	55.04	62.54	64.26	33,648
Two	1,641	45,857	88,634	36.14	45.45	43.96	7,793
One	1,006	21,710	42,135	29.20	37.92	36.82	3,343
INNS: Silver stars							
Two and three	2,707	40,834	77,204	29.86	39.01	36.13	5,716
One	3,340	38,742	69,711	28.75	34.96	36.14	5,358
Annual rate	-1.30	-0.19	0.32	1.72	2.50	2.44	4.30

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	11,754	165,459	60,413	1,378,299	80.77	82.28	91.85	8.12	11,625
Isla de Gran Canaria	31,412	186,033	104,957	1,472,407	79.75	81.57	91.17	7.25	12,704
Sur de Tenerife	16,072	185,011	85,339	1,467,111	78.56	80.78	87.48	7.72	13,808
Isla de Tenerife	47,296	232,332	203,375	1,793,570	77.52	80.01	86.28	7.14	17,705
Isla de Fuerteventura	10,055	121,160	47,759	1,075,772	77.33	75.62	89.88	8.56	8,487
Isla de Lanzarote	13,835	98,048	66,605	787,514	75.57	76.82	90.27	7.63	6,855
Isla de La Gomera	1,230	6,911	2,414	37,355	73.41	77.13	82.64	4.89	390
Isla de La Palma	3,524	12,506	11,427	96,989	72.89	72.25	90.65	6.76	732

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

Barcelona	151,195	415,011	260,151	1,064,160	53.08	59.68	67.06	2.34	14,382
Costa Blanca	145,303	124,905	495,461	646,250	62.62	69.97	67.68	4.23	7,987
Costa del Sol	99,495	155,635	215,416	667,019	52.35	59.55	65.52	3.46	8,529
Isla de Mallorca	35,044	63,760	115,760	272,860	52.02	56.95	64.18	3.93	4,298
Costa Barcelona	89,651	90,050	158,709	188,601	41.32	41.78	56.49	1.93	3,259
Palma - Calvià	25,463	53,142	66,394	210,397	50.01	54.29	62.87	3.52	3,179
Costa Brava	53,968	49,384	108,001	128,816	30.41	38.78	37.67	2.29	2,852
Costa de la Luz de Cádiz	51,310	30,577	107,121	95,242	34.28	41.90	43.88	2.47	2,585

Tourist site with a greater occupancy rate per month

San Bartolomé de Tirajana	9,581	119,737	50,030	1,018,586	82.06	83.70	91.79	8.26	9,245
Pájara	3,546	70,504	18,838	656,314	81.09	79.80	90.73	9.12	5,026
Puerto de La Cruz	14,668	32,836	81,873	269,750	81.07	83.11	86.22	7.40	2,878
Arona	4,204	56,631	24,584	457,596	80.54	83.21	87.84	7.93	3,501
Adeje	6,222	93,800	34,770	765,340	78.32	79.98	87.63	8.00	7,717
Yaiza	6,248	46,176	36,505	371,645	77.62	77.79	89.67	7.79	3,652
Mogán	2,116	46,153	10,393	362,135	77.53	78.59	92.39	7.72	2,374
Tías	2,037	28,043	9,226	232,019	76.88	79.66	92.22	8.02	1,563
Antigua	2,704	22,259	8,792	174,614	74.52	73.53	89.86	7.35	1,193
Palmas de Gran Canaria (Las)	16,278	16,981	37,730	83,880	73.42	77.70	87.02	3.66	885

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

Madrid	387,314	370,233	667,672	851,015	61.08	73.47	78.12	2.00	11,838
Barcelona	142,681	396,615	243,677	1,022,189	53.73	60.70	67.27	2.35	13,656
Benidorm	64,373	71,758	323,012	461,079	69.73	75.61	72.73	5.76	4,675
Sevilla	103,076	107,420	183,808	241,083	64.34	76.82	75.75	2.02	3,459
Valencia	68,898	65,538	115,424	173,987	52.48	64.57	68.16	2.15	2,243
Oliva (La)	3,013	24,332	18,433	213,114	72.53	70.58	91.95	8.47	2,024
Palma de Mallorca	26,366	46,750	69,975	160,076	52.79	58.54	63.75	3.15	2,581
Granada	68,256	63,213	121,114	108,782	54.41	77.62	62.36	1.75	1,647
Torremolinos	14,483	28,730	31,101	186,158	64.74	65.64	70.59	5.03	1,527
Teguise	3,134	21,303	14,926	170,397	70.55	71.88	90.33	7.58	1,509

* 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	6,070,978	100.00	17,492,340	100.00
Residents in Spain	3,322,024	54.72	6,701,111	38.31
Residents abroad	2,748,955	45.28	10,791,228	61.69
Total Residents abroad	2,748,955	100.00	10,791,228	100.00
Total Residents in E.U. (without Spain)	1,821,611	66.27	8,432,777	78.14
- Germany	357,225	12.99	2,292,900	21.25
- Austria	22,667	0.82	107,582	1.00
- Belgium	72,073	2.62	354,555	3.29
- Denmark	40,099	1.46	205,621	1.91
- Finland	40,240	1.46	245,833	2.28
- France	240,185	8.74	628,618	5.83
- Greece	7,934	0.29	21,369	0.20
- Ireland	39,152	1.42	172,757	1.60
- Italy	165,516	6.02	455,062	4.22
- Luxembourg	3,322	0.12	20,393	0.19
- Netherlands	102,873	3.74	398,510	3.69
- Poland	42,513	1.55	185,091	1.72
- Portugal	69,647	2.53	135,272	1.25
- United Kingdom	453,665	16.50	2,419,396	22.42
- Czech Republic	9,459	0.34	35,399	0.33
- Sweden	88,836	3.23	556,746	5.16
- Other EU countries*	66,205	2.41	197,673	1.83
Norway	43,205	1.57	281,719	2.61
Russia	38,418	1.40	126,649	1.17
Switzerland	47,293	1.72	186,632	1.73
Rest of Europe	64,392	2.34	186,846	1.73
Japan	40,705	1.48	74,294	0.69
United States of America	158,189	5.75	372,406	3.45
Rest of America	191,865	6.98	459,028	4.25
Africa	50,882	1.85	114,176	1.06
Other countries	292,394	10.64	556,700	5.16

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

Hotel Price Index (HPI). 2008 Base

November 2017

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	104.63	4.49
Andalucía	99.95	2.74
Aragón	80.60	-1.08
Asturias, Principado de	89.18	2.69
Balears, Illes	112.31	3.40
Canarias	128.18	6.59
Cantabria	87.04	2.26
Castilla y León	91.76	2.26
Castilla - La Mancha	90.23	2.25
Cataluña	92.12	-0.45
Comunitat Valenciana	105.35	6.79
Extremadura	92.61	0.80
Galicia	90.84	1.58
Madrid, Comunidad de	90.92	8.26
Murcia, Región de	84.17	5.54
Navarra, Comunidad Foral de	83.27	1.85
País Vasco	99.40	4.32
Rioja, La	89.15	-1.71
Ceuta	91.34	4.80
Melilla	99.87	6.62

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	104.63	4.49
HOTELS: Gold stars		
Five	98.77	2.10
Fourth	106.83	4.53
Three	104.65	6.32
Two	96.98	2.79
One	106.18	9.60
HOSTALS: Silver stars		
Three and two	97.78	3.78
One	104.67	4.76

Indicators on the Profitability of the Hotel Sector

November 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	79.59	3.95	47.76	7.30
Andalucía	64.34	2.10	34.67	4.91
Aragón	49.52	-0.69	19.85	9.72
Asturias, Principado de	53.90	4.30	16.56	-0.86
Balears, Illes	70.95	-3.35	44.17	13.87
Canarias	100.66	5.19	89.57	3.93
Cantabria	56.75	3.34	21.35	18.71
Castilla y León	55.03	2.46	21.21	8.62
Castilla - La Mancha	53.20	3.50	19.82	15.21
Cataluña	89.02	3.19	48.31	-1.69
Comunitat Valenciana	62.51	7.21	37.24	12.75
Extremadura	53.96	-3.17	20.08	5.37
Galicia	51.44	1.63	18.12	15.19
Madrid, Comunidad de	89.04	8.42	66.91	18.61
Murcia, Región de	54.18	3.99	29.02	21.07
Navarra, Comunidad Foral de	61.16	4.43	29.19	8.75
País Vasco	74.24	4.77	44.68	11.55
Rioja, La	62.02	4.31	31.52	11.95
Ceuta	69.98	4.43	43.48	12.30
Melilla	75.58	16.11	64.41	59.97

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	79.59	3.95	47.76	7.30
HOTELS: Gold stars				
Five	166.27	1.16	108.88	0.36
Four	85.61	2.93	59.56	4.17
Three	61.87	7.68	39.47	12.97
Two	49.73	2.21	22.01	7.27
One	51.77	7.63	19.12	11.95
GUESTHOUSES: Silver stars				
Three and two	45.76	6.58	16.65	14.71
One	40.64	11.77	14.39	27.08

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room