

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

**Overnight stays in hotel establishments register an increase of 4.0% in November, as compared with the same month of 2017**

**Hotels invoice an average of 82.0 euros per occupied room, representing an annual increase of 3.3%**

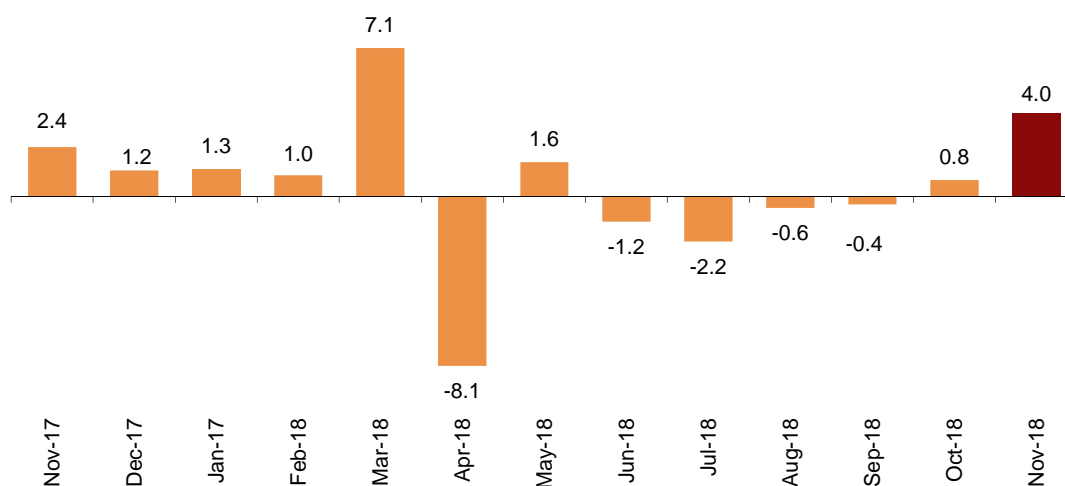
In November, overnight stays in hotel establishments exceeded 18.2 million, 4.0% more than in the same month in 2017. Overnight stays by residents in Spain increased by 6.1% and those of non-residents did so by 2.7%.

The average stay decreased by 2.4% compared with November 2017, to 2.8 overnight stays per traveller.

During the first 11 months of 2018, overnight stays decreased by 0.2% as compared with the same period of the previous year.

**Annual variation rate for overnight stays**

Percentage

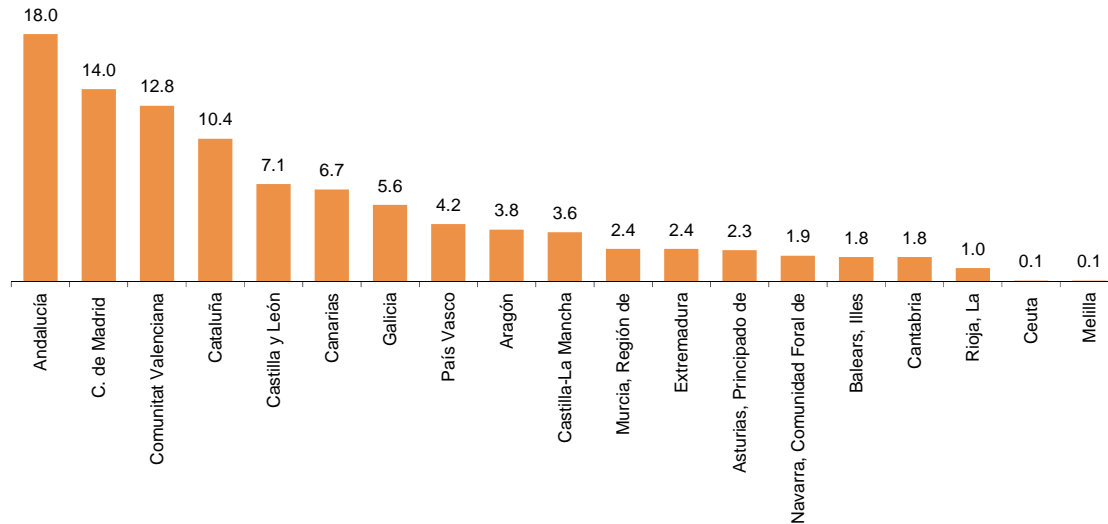


## Destinations

Andalucía, Comunidad de Madrid and Comunitat Valenciana were the main destinations of residents in Spain in November, with annual variation rates in the number of overnight stays of 6.2%, 7.2% and 5.1% respectively.

### Distribution of overnight stays: residents

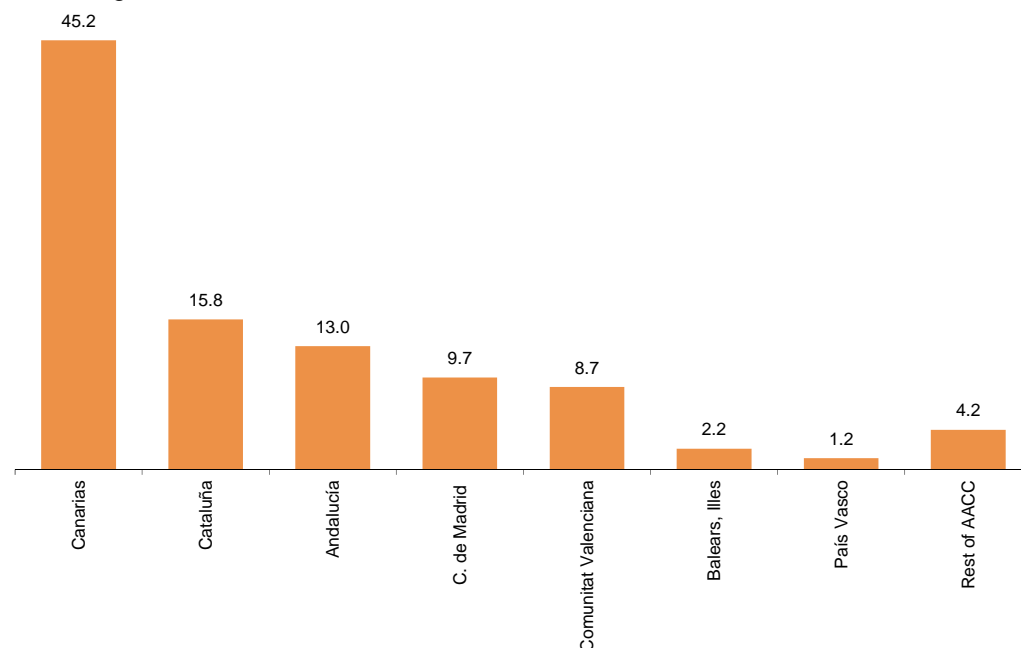
Percentage



The main destination chosen by non-residents was Canarias, with 45.2% of total overnight stays. In this Autonomous Community, overnight stays of foreign nationals decreased by 4.9% compared with November 2017. The next most popular destinations of non-residents were Cataluña (with 15.8% of the total overnight stays and an increase of 21.2%) and Andalucía (with 13.0% of the total and an increase of 5.5%).

### Distribution of overnight stays: non-residents

Percentage

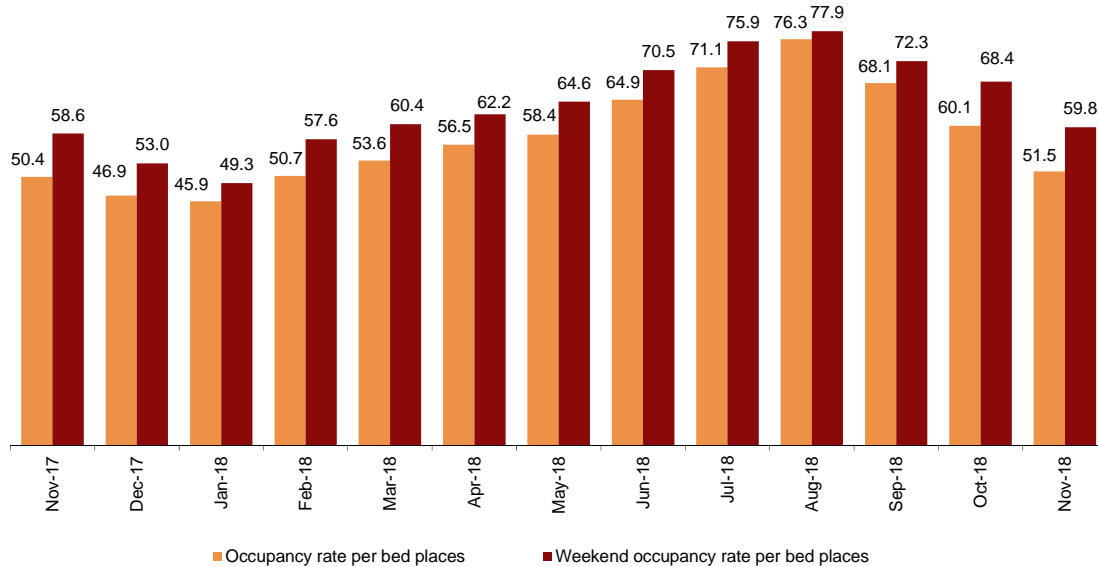


### Hotel occupancy

In November, 51.5% of the available bed-places were occupied, representing an annual increase of 2.0%. The weekend occupancy rate by bed-places increased 2.0%, standing at 59.8%.

### Occupancy rate

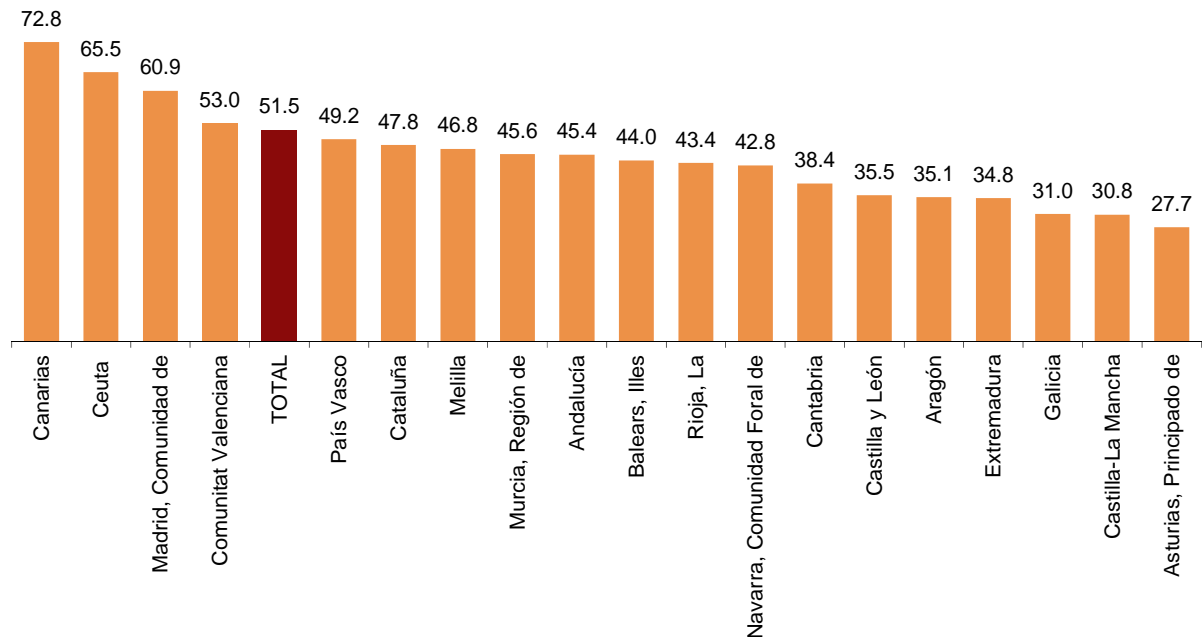
Percentage



Canarias showed the highest occupancy rate by bedplaces in November (72.8%). It was followed by Comunidad de Madrid (60.9%) and Comunitat Valenciana (53.0%).

### Occupancy rate per bed places by autonomous community

Percentage



By tourist area, Sur de Gran Canaria registered the highest occupancy rate by bed-places (76.4%) and Sur de Tenerife registered the highest weekend occupancy rate (78.1%). The island of Tenerife registered the highest number of overnight stays, with 2.0 million.

The tourist places with the most overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Puerto de La Cruz reached the highest occupancy rate by bed places (79.6%) and Arona the greatest weekend occupancy rate (79.8%).

## Overnight stays according to the country of origin of the travellers

In November, travellers from the United Kingdom and Germany represented 22.8% and 18.8% of total overnight stays of non-residents in hotel establishments, respectively. The British market increased by 4.8%, while the German decreased by 8.8%.

Overnight stays by travellers from France, Sweden and Italy (the following countries of origin) recorded annual rates of -1.3%, -8.1% and 10.6%, respectively.

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

Percentage

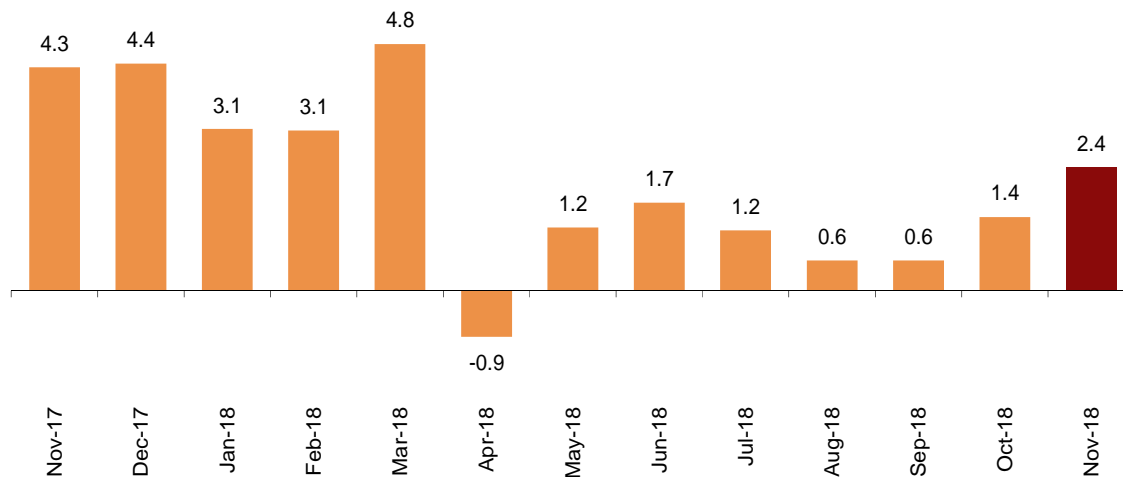


## Hotel Prices

The annual rate of the Hotel Price Index (HPI) was 2.4% in November, which is 1.0 percentage points more than last month and 1.9 percentage points below that registered a year ago.

### Hotel Prices Index.

Annual variation rate. Percentage



In November, Canarias, Cataluña, Comunidad de Madrid and Andalucía were the Autonomous Communities with the greatest weighting in the HPI (they represented 75.6% of the total weight). Hotel prices increased by 5.7% in the annual rate in Cataluña, 4.6% in Andalucía and 2.8% in Comunidad de Madrid. In contrast, they decreased by 0.1% in Canarias.

By category, prices rose in all one-silver-star establishments (6.6%), in two-gold-star establishments (4.7%), in four-gold-star establishments (3.3%), in three and two-silver-star establishments (2.5%), in one-gold-star establishments (2.0%) and in three-gold-star establishments (1.8%).

In turn, prices fell in five-gold-star establishments (-1.1%)

## Profitability of the Hotel Sector

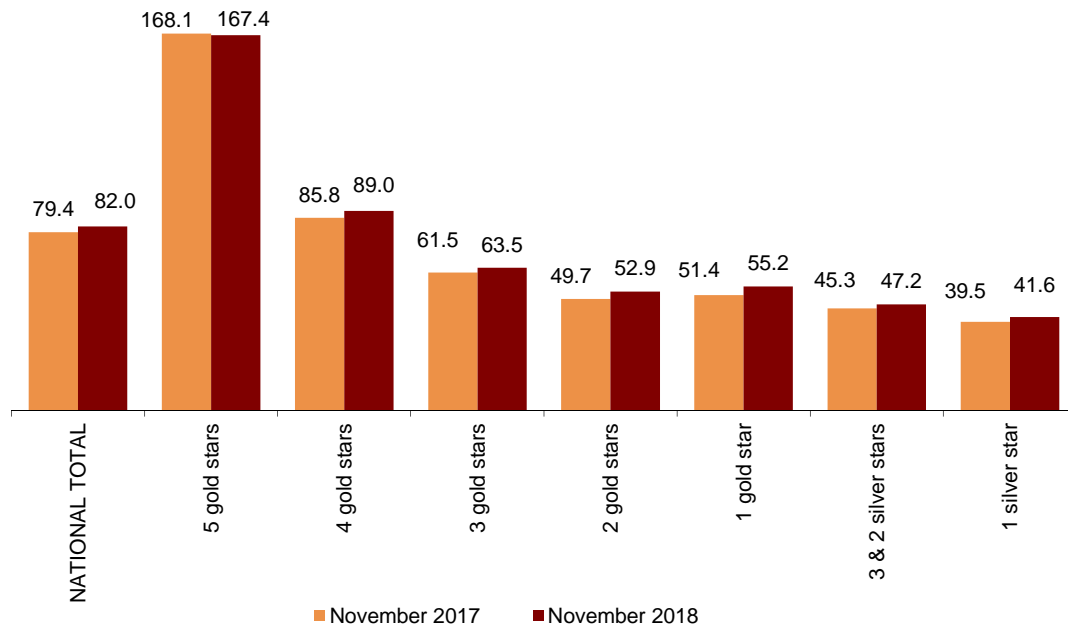
The average daily rate per occupied room (ADR) of hotels was 82.0 euros in November, representing an increase of 3.3% as compared with the same month of 2017.

On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 50.0 euros, with a 5.2% increase.

By category, the average rate was 167.4 euros for five-star hotels, 89.0 euros for four-star hotels and 63.5 euros for three-star hotels. Revenues per available room for these same categories were 106.9, 62.9 and 40.1 euros, respectively.

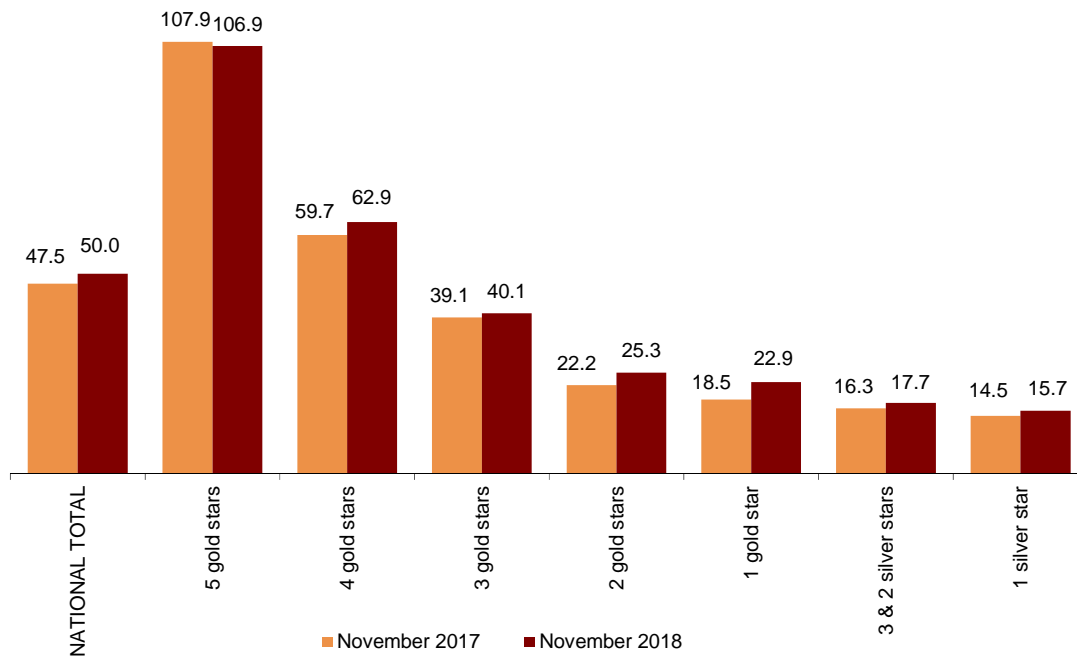
**Average daily rate by hotel category**

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 the month of November 2017 of the Hotel Price Index (HPI) and of 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, both from the point of view of supply and demand, and thus meet the need for knowledge of the sector by national institutions and the requirements of international organisations.

The Hotel Price Index (HPI) is a statistical measure of the monthly evolution of the prices that hotel entrepreneurs apply to their clients.

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 a way that all the establishments cover the whole month.

**Sample design:** stratified sampling by province and category of the establishment, being exhaustive those strata of 4 and 5 gold star categories.

**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 of them in INEbase.

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## Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

November 2018

Provisional Data

21st December 2018

### 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	
<b>TOTAL</b>	6,463,481	3,533,107	2,930,374	18,236,555	7,130,814	11,105,741	2.82
<b>HOTELS: Golden stars</b>							
Five	423,388	136,869	286,519	1,398,586	267,569	1,131,017	3.30
Four	3,158,905	1,604,284	1,554,622	9,474,302	3,204,517	6,269,784	3.00
Three	1,558,712	900,794	657,918	4,459,496	1,908,925	2,550,571	2.86
Two	500,854	338,466	162,388	1,070,329	629,632	440,697	2.14
One	200,025	132,495	67,531	427,815	245,060	182,755	2.14
<b>INNS: Silver stars</b>							
Two and three	334,481	234,147	100,334	695,732	459,599	236,133	2.08
One	287,116	186,052	101,063	710,295	415,511	294,784	2.47
Annual rate	6.51	5.75	7.44	3.99	6.05	2.70	-2.37
Cumulative annual rate	1.23	1.33	1.13	-0.23	0.65	-0.68	-1.44

### 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	
<b>TOTAL</b>	13,001	569,847	1,171,362	51.47	59.78	61.66	164,583
<b>HOTELS: Golden stars</b>							
Five	273	41,555	86,205	53.69	61.44	64.44	27,000
Four	1,921	250,149	532,483	58.80	66.99	71.93	82,279
Three	2,037	128,142	268,564	54.87	62.65	64.64	32,713
Two	1,661	46,852	90,732	38.98	50.40	47.86	8,062
One	1,035	22,012	43,093	32.87	40.88	40.07	3,485
<b>INNS: Silver stars</b>							
Two and three	2,708	40,918	77,172	29.95	39.11	36.32	5,921
One	3,366	40,220	73,115	32.27	39.41	39.05	5,123
Annual rate	-0.17	1.42	1.98	2.04	2.04	2.70	2.13



### 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		
<b>Tourist area with a greater occupancy rate per month</b>									
Sur de Gran Canaria	12,631	161,346	64,110	1,333,165	76.39	76.50	87.53	8.03	12,045
Isla de La Gomera	1,602	6,894	2,870	38,362	76.26	77.38	83.80	4.85	389
Isla de Gran Canaria	32,220	182,878	107,816	1,421,291	75.70	76.14	87.63	7.11	13,010
Sur de Tenerife	19,871	195,017	92,830	1,455,821	75.59	78.06	85.16	7.21	14,911
Isla de Tenerife	55,727	242,314	224,342	1,783,949	74.97	77.10	84.69	6.74	18,774
Isla de Lanzarote	15,768	98,017	69,894	769,594	73.27	73.67	87.04	7.38	7,041
Isla de Fuerteventura	11,609	101,428	58,585	929,513	65.95	66.33	79.20	8.74	8,388
Barcelona	142,960	512,614	247,939	1,341,856	61.02	66.23	76.77	2.43	14,632

#### Tourist area with a greater number of overnight stays per month<sup>1</sup>

Costa Blanca	151,701	132,741	505,507	666,559	60.36	65.90	67.20	4.12	8,114
Costa del Sol	98,568	157,511	207,650	686,614	51.55	56.58	64.49	3.49	8,631
Costa Barcelona	86,291	93,674	150,555	194,687	43.70	42.24	58.67	1.92	2,987
Isla de Mallorca	35,138	53,875	93,595	241,014	44.85	49.68	56.43	3.76	4,498
Costa Brava	64,982	58,178	126,270	149,186	35.35	48.37	41.99	2.24	2,999
Palma - Calvià	31,178	42,312	87,476	183,798	45.61	49.54	57.72	3.69	3,495
Costa de la Luz (Cádiz)	52,070	31,042	105,622	92,964	34.70	43.97	43.76	2.39	2,182
Rías Baixas	58,173	10,817	129,496	21,831	30.74	37.97	37.87	2.19	1,922

<sup>1</sup> Sin considerar los incluidos en la tabla anterior, por aparecer también con mayor grado de ocupación.

#### Tourist site with a greater occupancy rate per month

Puerto de La Cruz	18,544	33,200	91,441	272,556	79.56	77.98	86.11	7.03	2,912
Arona	5,250	57,311	23,493	446,237	78.48	79.79	88.09	7.51	3,487
Mogán	2,333	47,706	11,343	380,515	78.00	78.75	90.95	7.83	2,640
San Bartolomé de Tirajana	10,375	114,006	52,135	954,038	75.82	75.70	86.47	8.09	9,440
Tías	2,052	29,974	9,254	233,013	75.77	75.09	88.03	7.56	1,700
Adeje	8,665	102,451	41,633	766,556	74.60	78.22	83.65	7.27	8,546
Yaiza	5,394	43,467	33,400	346,929	74.05	73.10	85.10	7.78	3,528
Palmas De Gran Canaria (Las)	15,513	17,684	34,169	76,714	70.76	75.36	89.76	3.34	746
Teguise	5,622	22,079	21,655	176,552	69.52	73.41	89.70	7.16	1,647
Benidorm	76,901	75,682	357,243	490,227	68.73	72.81	74.08	5.55	5,140

#### Tourist site with a greater number of overnight stays per month<sup>1</sup>

Madrid	416,503	407,692	711,358	965,816	64.10	75.35	81.79	2.03	11,765
Barcelona	133,661	491,753	228,997	1,291,686	61.79	67.06	76.99	2.43	13,956
Pájara	4,355	60,336	21,480	576,839	67.30	67.79	79.24	9.25	4,993
Sevilla	111,691	107,135	206,319	250,891	66.22	78.71	79.21	2.09	3,818
Valencia	66,041	73,737	113,818	188,984	54.54	69.29	69.27	2.17	2,224
Granada	73,637	63,756	136,544	110,621	53.88	76.83	61.46	1.80	1,748
Palma de Mallorca	27,978	41,357	59,945	162,820	46.27	52.88	58.16	3.21	2,977
Málaga	48,927	63,976	76,075	127,800	60.91	71.10	77.74	1.81	1,564
Oliva (La)	1,529	21,243	8,101	189,744	63.27	63.52	80.88	8.69	1,958
Torremolinos	11,143	25,018	23,889	169,635	60.16	60.21	65.85	5.35	1,506

<sup>1</sup> 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	6,463,481	100.00	18,236,555	100.00
Residentes en España	3,533,107	54.66	7,130,814	39.10
Residentes en el extranjero	2,930,374	45.34	11,105,741	60.90
TOTAL residentes en el extranjero	2,930,374	100.00	11,105,741	100.00
TOTAL residentes en U.E. (sin España)	1,867,790	63.74	8,358,940	75.27
- Alemania	341,277	11.65	2,083,588	18.76
- Austria	25,698	0.88	115,637	1.04
- Bélgica	69,144	2.36	341,772	3.08
- Dinamarca	37,298	1.27	194,408	1.75
- Finlandia	40,927	1.40	253,990	2.29
- Francia	244,450	8.34	616,374	5.55
- Grecia	14,999	0.51	39,958	0.36
- Irlanda	40,900	1.40	179,578	1.62
- Italia	180,432	6.16	502,610	4.53
- Luxemburgo	4,501	0.15	21,155	0.19
- Países Bajos	96,981	3.31	378,769	3.41
- Polonia	42,292	1.44	172,017	1.55
- Portugal	79,082	2.70	157,702	1.42
- Reino Unido	482,909	16.48	2,531,834	22.80
- República Checa	12,244	0.42	42,932	0.39
- Suecia	82,831	2.83	513,555	4.62
- Resto de la UE <sup>1</sup>	71,824	2.45	213,062	1.92
Noruega	44,066	1.50	290,146	2.61
Rusia	41,989	1.43	128,101	1.15
Suiza	50,698	1.73	187,840	1.69
Resto de Europa	62,080	2.12	227,297	2.05
Japón	48,493	1.65	91,534	0.82
Estados Unidos	187,101	6.38	451,052	4.06
Resto de América	215,047	7.34	523,727	4.72
Países africanos	58,314	1.99	160,146	1.44
Resto del mundo	354,797	12.11	686,958	6.19

<sup>1</sup> Countries included in Other EU countries: Bulgaria, Cyprus, Croatia, Slovakia, Slovenia, Estonia, Hungary, Latvia, Lithuania, Malta and Romania

## Indicators on the Profitability of the Hotel Sector November 2018

Provisional data

### National ADR and RevPAR<sup>1</sup> and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
<b>TOTAL</b>	82.04	3.28	49.98	5.22
Andalucía	69.62	8.51	37.91	9.94
Aragón	53.67	8.86	22.75	15.64
Asturias, Principado de	54.74	1.81	18.80	13.60
Balears, Illes	83.03	14.83	45.15	0.36
Canarias	100.47	-1.10	85.06	-5.78
Cantabria	57.66	1.03	22.46	3.20
Castilla y León	56.93	3.03	23.45	11.49
Castilla - La Mancha	54.22	2.52	20.21	3.33
Cataluña	95.58	9.49	57.40	22.02
Comunitat Valenciana	63.40	1.35	37.96	2.53
Extremadura	56.27	4.27	23.09	16.33
Galicia	53.10	3.32	19.76	12.02
Madrid, Comunidad de	90.69	4.12	70.53	6.83
Murcia, Región de	54.10	-0.16	29.86	2.98
Navarra, Comunidad Foral de	62.68	1.95	33.14	13.40
País Vasco	79.74	8.10	49.54	11.66
Rioja, La	63.33	2.03	32.68	3.65
Ceuta	70.03	0.08	49.80	14.84
Melilla	66.00	-12.67	44.28	-31.26

<sup>1</sup> ADR: Average Daily Rate  
RevPAR: Revenue per Available Room

### National ADR and RevPar<sup>1</sup> and breakdown by categories

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
<b>TOTAL</b>	82.04	3.28	49.98	5.22
<b>HOTELS: Gold stars</b>				
Five	167.42	-0.40	106.94	-0.92
Four	89.02	3.73	62.88	5.36
Three	63.49	3.25	40.11	2.69
Two	52.92	6.49	25.28	14.08
One	55.20	7.46	22.87	23.41
<b>GUESTHOUSES: Silver stars</b>				
Three and two	47.24	4.22	17.67	8.22
One	41.55	5.28	15.73	8.83

<sup>1</sup> ADR: Average Daily Rate  
RevPAR: Revenue per Available Room

## Hotel Price Index (HPI). 2008 Base

November 2018

Provisional data

### National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	107.00	2.40
Andalucía	104.13	4.58
Aragón	85.91	6.34
Asturias, Principado de	90.45	1.25
Balears, Illes	116.04	2.84
Canarias	128.10	-0.07
Cantabria	88.83	2.11
Castilla y León	93.85	2.44
Castilla - La Mancha	93.16	3.29
Cataluña	97.02	5.66
Comunitat Valenciana	106.35	0.42
Extremadura	94.93	2.70
Galicia	94.00	3.56
Madrid, Comunidad de	92.87	2.77
Murcia, Región de	85.29	1.38
Navarra, Comunidad Foral de	84.33	0.92
País Vasco	106.15	7.04
Rioja, La	91.78	2.91
Ceuta	93.42	2.28
Melilla	96.16	-3.72

### National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	107.00	2.40
HOTELS: Gold stars		
Five	97.24	-1.13
Fourth	110.23	3.27
Three	106.60	1.84
Two	101.61	4.67
One	108.80	2.03
HOSTALS: Silver stars		
Three and two	98.88	2.47
One	111.38	6.58