

22 October 2018

**Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)**

September 2018. Provisional data

**Overnight stays in hotel establishments decrease by 0.4% in September as compared with the same month of 2017**

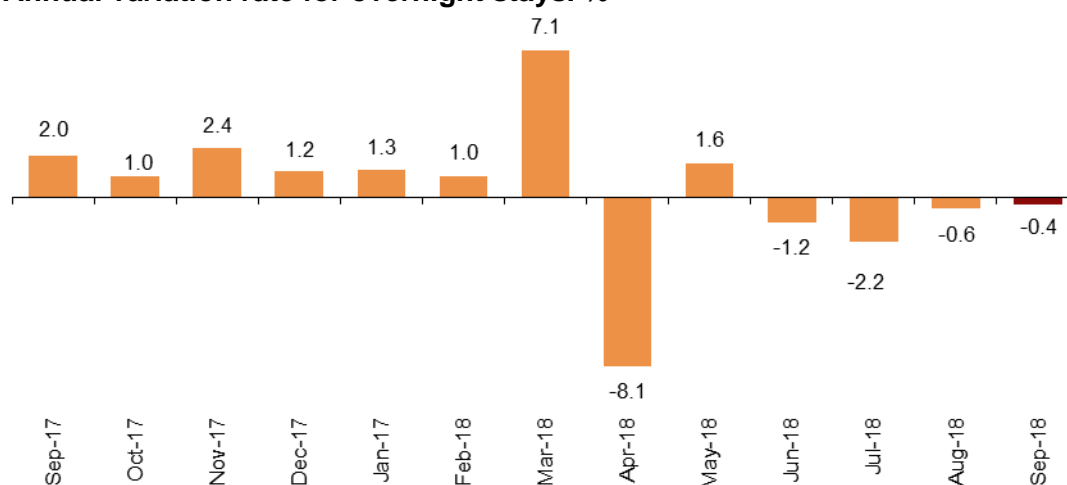
**Hotels invoice an average of 90.3 euros per occupied room, representing an annual increase of 0.8%**

During the month of September overnight stays in hotel establishments exceeded 37.8 million, 0.4% less than in the same month of 2017. Overnight stays by residents in Spain increased by 0.5%, while those by non-residents decreased by 0.8%.

The average stay decreased 1.0% as compared with September 2017, and stood at 3.4 overnight stays per traveller.

During the first nine months of 2018, overnight stays decreased by 0.6% as compared with the same period of the previous year.

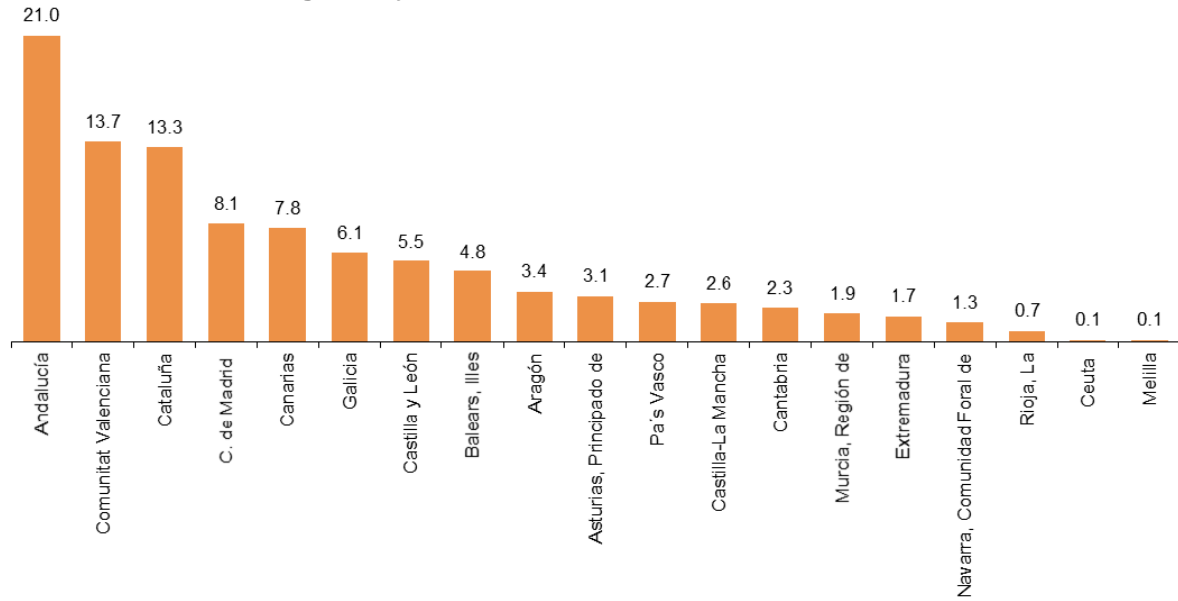
**Annual variation rate for overnight stays. %**



### Destinations

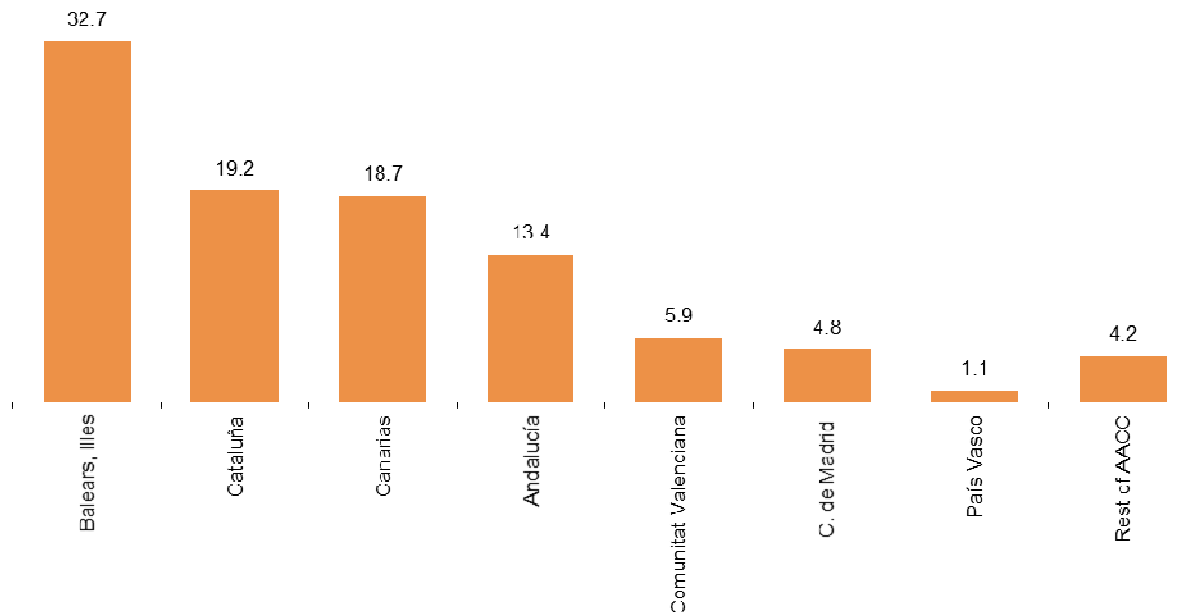
Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of residents in Spain in September, with annual variation rates in the number of overnight stays of 6.0%, -1.6%, -5.0% and 6.6%, respectively.

#### Distribution of overnight stays: residents. %



The main destination chosen by non-residents was Illes Balears, with 32.7% of total overnight stays. In this Autonomous Community, overnight stays by foreigners did not vary compared to September 2017. The following destinations of non-residents were Cataluña (with 19.2% of the total overnight stays and an increase of 0.4%) and Canarias (with 18.7% of the total and a decrease of 3.1%).

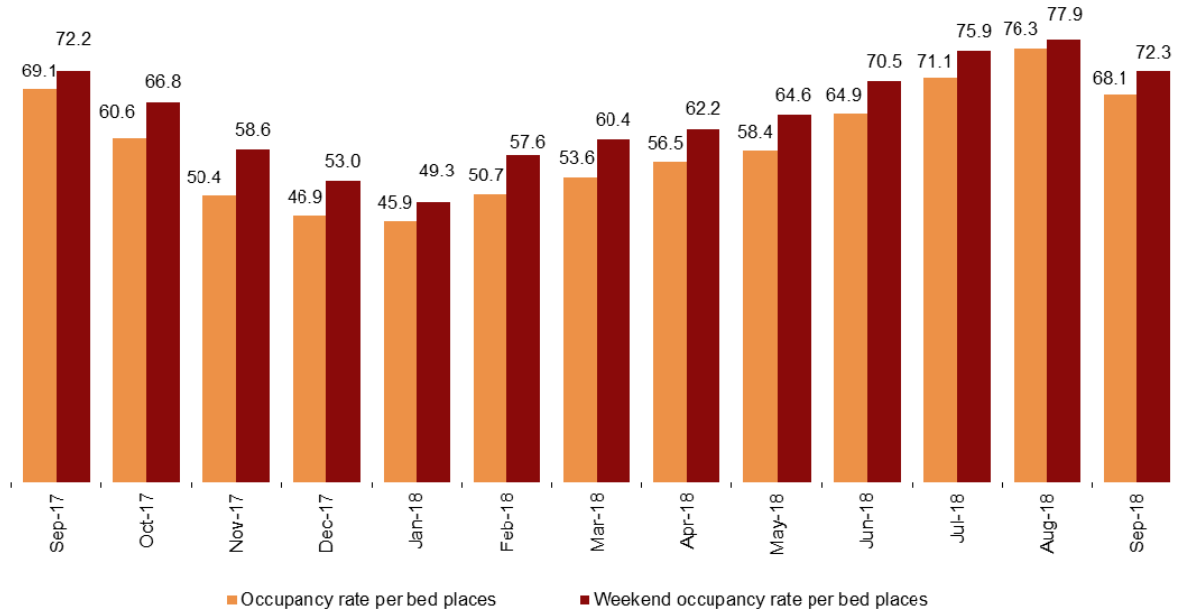
#### Distribution of overnight stays: non-residents. %



## Hotel occupancy

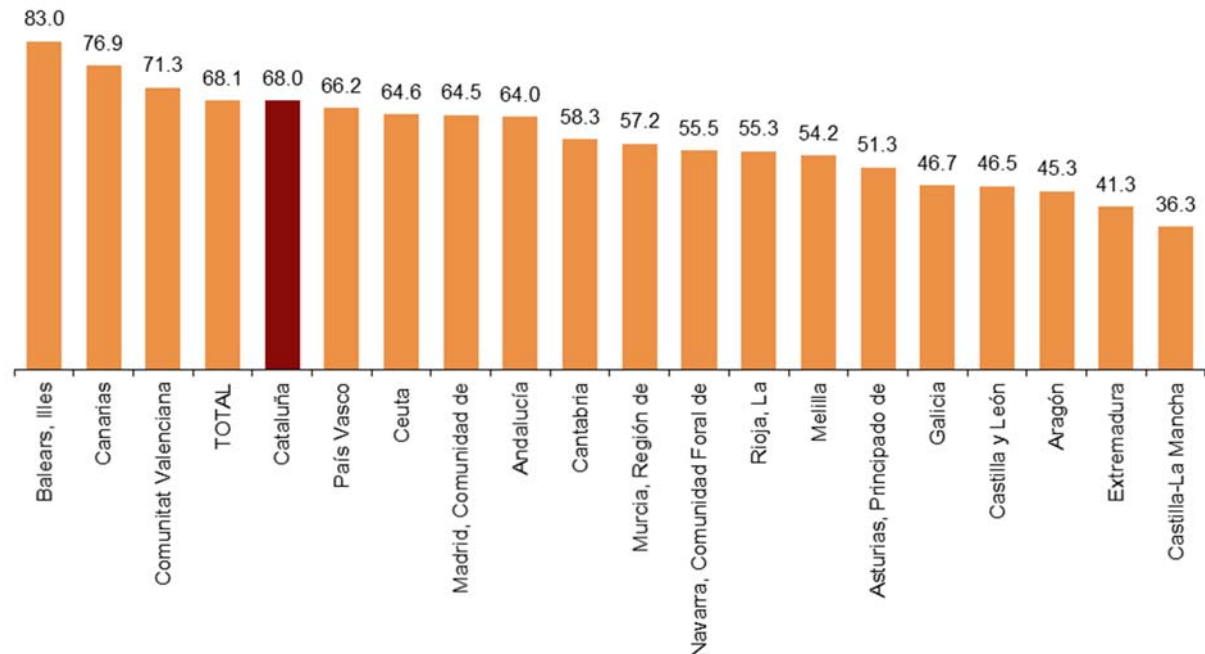
In September, 68.1% of the available bed-places were occupied, indicating an annual decrease of 1.4%. The weekend occupancy rate by bed-places did not vary, standing at 72.3%.

### Occupancy rate. %



Illes Balears showed the highest occupancy rate by bed-places in September (83.0%). It was followed by Canarias (76.9%) and Comunitat Valenciana (71.3%).

### Occupancy rate per bed-places by Autonomous Community. %



By tourist areas, the islands of Ibiza-Formentera registered the highest occupancy rate by bed-places (83.8%), and Palma-Calvià registered the highest weekend occupancy rate (86.7%). The island of Mallorca registered the highest number of overnight stays, with more than 6.7 million.

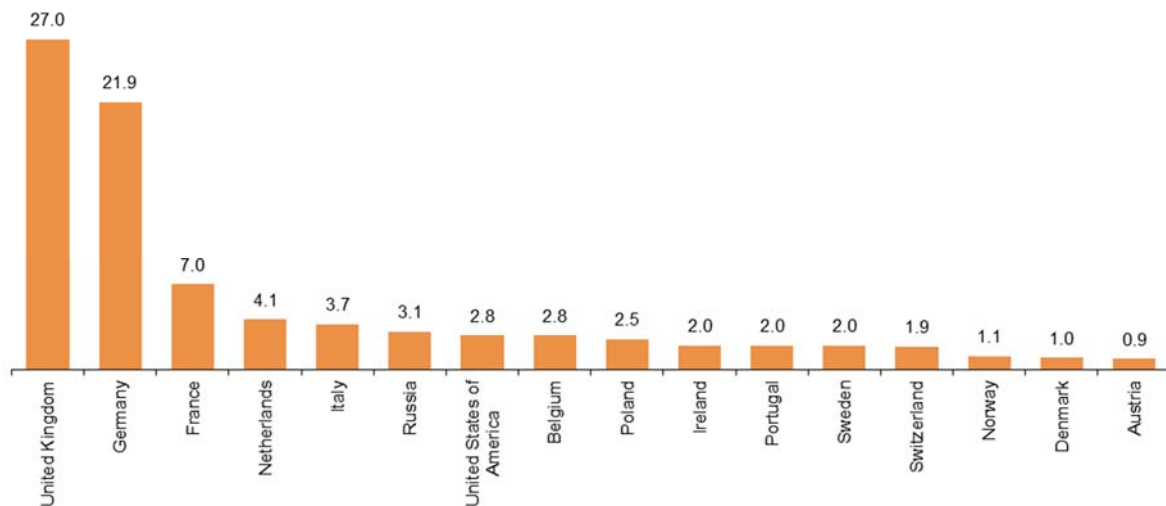
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Cambrils recorded the highest occupancy rate by bed-places (94.3%) and Palma de Mallorca registered the greatest weekend occupancy rate (90.4%).

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

Travellers from the United Kingdom and Germany accounted for 27.0% and 21.9%, respectively, of total overnight stays of non-residents in hotel establishments in September. The British market decreased by 0.5% and the German by 7.0%.

Overnight stays of travellers from France, the Netherlands and Italy (the following countries of origin) registered annual rates of 2.4%, -4.8% and 2.8%, respectively.

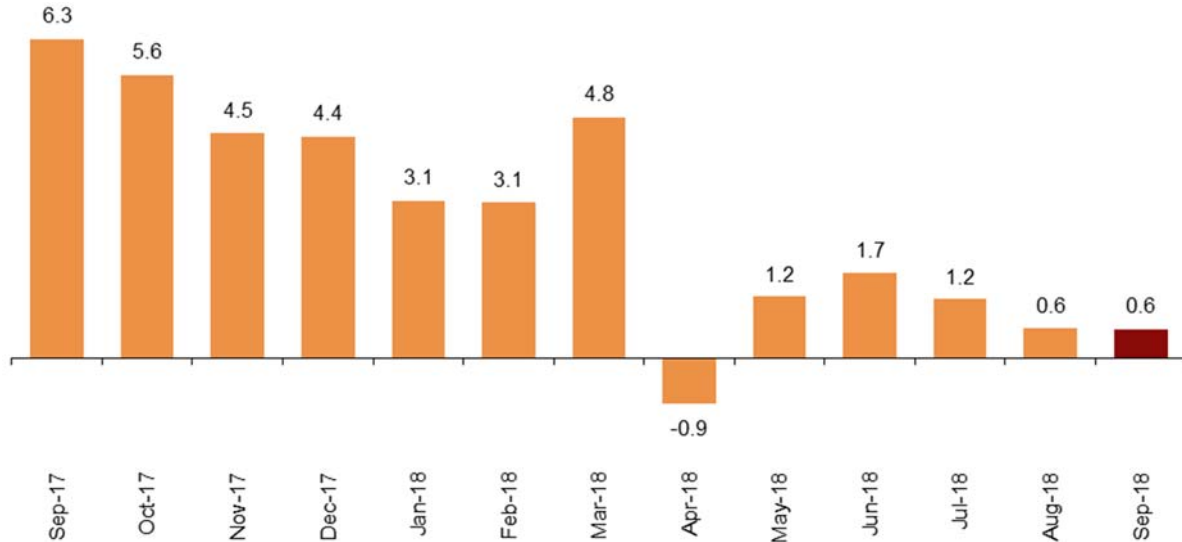
## Distribution of non-residents overnight stays. Main country of residence. %



## Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 0.6% in September, the same as last month and 5.7 points below that recorded 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 September (accounting for 74.8% of the total weight). Hotel prices increased by 1.6% in the annual rate in Andalucía, 1.5% in Illes Balears and 0.5% in Canarias. In turn, they fell by 1.1% in Cataluña.

By category, prices rose in one-silver-star establishments (6.6%), two-gold-star establishments (6.0%), one-gold-star establishments (1.4%), three-gold-star establishments (0.8%) and in four-gold-star establishments (0.3%).

In turn, prices fell in three and two-silver-star establishments (0.6%) and five-gold-star establishments (1.2%).

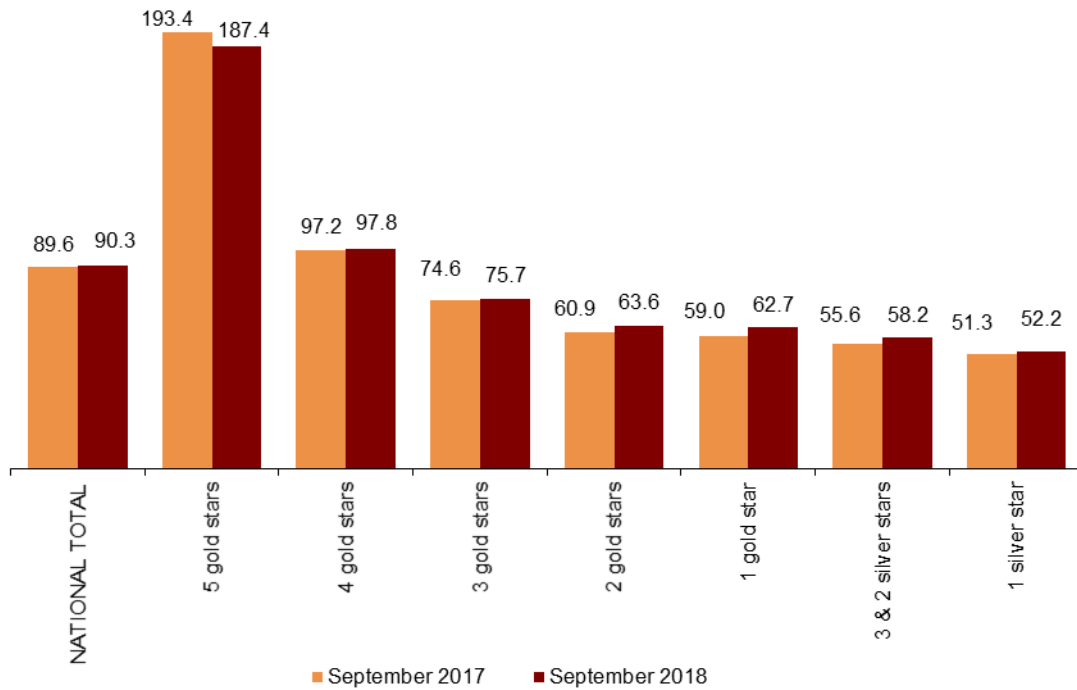
## Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 90.3 euros in September, which means an increase of 0.8% as compared with the same month of 2017.

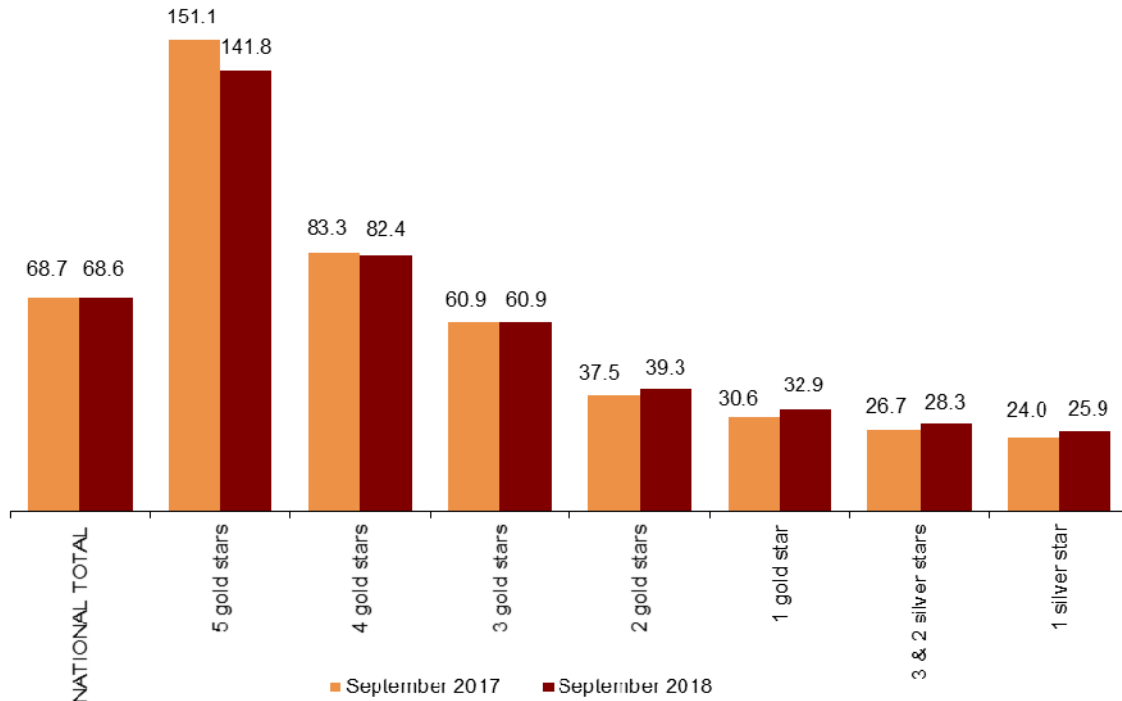
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 68.6 euros, with a 0.2% decrease.

By category, the average rate was 187.4 euros for five-star hotels, 97.8 euros for four-star hotels and 75.7 euros for three-star hotels. Revenues per available room for these same categories were 141.8, 82.4 and 61.0 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 September 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:** September 2018.

**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)

September 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	
<b>TOTAL</b>	<b>11,005,081</b>	<b>4,834,460</b>	<b>6,170,622</b>	<b>37,818,032</b>	<b>11,410,177</b>	<b>26,407,856</b>	<b>3.44</b>
HOTELS: Golden stars							
Five	604,067	165,741	438,326	2,085,959	367,171	1,718,788	3.45
Four	5,008,467	2,052,857	2,955,611	18,701,489	5,193,706	13,507,783	3.73
Three	3,140,058	1,328,707	1,811,352	11,746,865	3,281,047	8,465,818	3.74
Two	862,492	493,206	369,286	2,193,038	988,305	1,204,733	2.54
One	329,749	194,233	135,516	738,989	381,057	357,933	2.24
INNS: Silver stars							
Two and three	571,980	339,131	232,849	1,177,161	635,726	541,435	2.06
One	488,268	260,585	227,683	1,174,531	563,165	611,366	2.41
Annual rate	0.66	1.51	0.00	-0.38	0.48	-0.75	-1.03
Cumulative annual rate	0.72	0.96	0.49	-0.61	0.31	-1.08	-1.32

#### 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>	<b>16,440</b>	<b>865,540</b>	<b>1,812,913</b>	<b>68.08</b>	<b>72.25</b>	<b>75.97</b>	<b>268,316</b>
HOTELS: Golden stars							
Five	326	49,140	104,248	65.94	71.16	75.94	36,206
Four	2,628	379,060	824,352	73.99	77.50	84.49	131,374
Three	2,949	243,932	514,560	74.04	77.19	80.59	67,563
Two	2,127	67,165	131,514	55.05	62.45	61.61	13,152
One	1,320	28,383	55,476	44.18	51.09	50.37	4,866
INNS: Silver stars							
Two and three	3,194	49,391	93,686	41.62	48.70	47.05	7,913
One	3,896	48,470	89,078	43.44	48.76	50.43	7,242
Annual rate	0.07	0.98	1.20	-1.42	0.02	-0.75	2.14



### 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		
<b>Tourist area with a greater occupancy rate per month</b>									
Ibiza-Formentera	42,549	284,029	140,906	1,495,190	83.82	83.20	85.62	5.01	11,151
Mallorca	74,497	1,053,705	251,710	6,521,198	83.46	83.56	89.28	6.00	44,293
Palma - Calvãa	39,045	490,098	111,663	2,492,908	83.05	86.67	87.95	4.92	18,393
Lanzarote	22,991	101,416	125,462	825,408	81.62	79.09	94.74	7.64	7,120
Costa Blanca (Alicante)	184,632	223,039	695,445	1,098,107	79.64	82.59	84.71	4.40	10,209
Sur De Tenerife	41,449	180,247	168,974	1,445,983	79.14	78.93	86.94	7.28	15,095
Sur De Gran Canaria	37,587	144,325	180,564	1,236,187	78.87	78.65	88.07	7.79	11,555
Tenerife	86,014	220,991	360,398	1,733,061	77.76	78.50	85.29	6.82	18,936

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

Costa del Sol (M laga)	130,892	363,019	373,186	1,655,827	72.71	75.21	84.90	4.11	15,170
Barcelona	120,061	630,536	218,514	1,681,674	74.58	79.61	86.18	2.53	15,174
Gran Canaria	57,522	156,680	230,248	1,292,496	76.60	77.00	85.85	7.11	12,485
Costa Brava	156,206	280,296	356,579	1,159,708	65.32	71.95	71.71	3.47	9,203
Costa Daurada	168,695	169,633	441,165	1,038,352	72.18	76.16	79.33	4.37	6,848
Costa Barcelona 2016	129,722	269,616	237,544	1,115,573	71.53	72.15	80.64	3.39	7,565
Fuerteventura	23,834	115,880	130,670	1,014,299	75.27	75.42	88.12	8.20	8,896
Costa de la Luz de C diz	145,737	96,727	433,672	448,552	68.05	72.49	79.37	3.64	7,147

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

Cambrils	16,535	19,062	53,881	144,684	94.35	90.37	91.21	5.58	989
Manacor	1,231	63,903	3,723	505,938	92.26	74.37	91.37	7.82	2,435
Santa Margalida	1,618	46,051	4,453	361,246	90.35	84.46	93.87	7.67	2,070
Sant Antoni De Portmany	8,438	63,598	32,069	316,577	89.54	88.20	89.18	4.84	1,570
Santa Susanna	8,938	39,722	18,693	275,741	88.62	85.73	89.04	6.05	1,498
Santa Eulària Des Riu	4,979	63,121	21,501	416,475	87.45	82.95	89.00	6.43	2,720
Muro	2,340	56,400	9,563	410,619	86.47	84.89	89.55	7.15	2,479
Tías	4,114	29,119	25,976	247,173	85.69	82.52	95.77	8.22	1,624
Benidorm	85,615	118,548	438,812	725,374	85.51	86.26	88.59	5.70	6,055
Salines, Ses	723	12,683	3,037	91,402	85.50	86.98	90.32	7.04	731

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

Barcelona	108,100	603,976	195,236	1,620,659	75.61	80.59	86.59	2.55	14,492
Madrid	362,717	497,766	604,455	1,143,179	67.03	73.69	82.92	2.03	11,788
Calvià	11,478	216,630	38,169	1,320,773	82.81	85.00	87.55	5.96	9,578
Palma De Mallorca	36,129	279,286	93,509	1,106,632	85.37	90.42	89.71	3.80	8,044
San Bartolomé De Tirajana	30,315	104,222	141,721	903,233	80.52	80.70	89.24	7.77	8,925
Salou	64,445	105,837	197,383	732,815	81.25	84.84	88.42	5.46	3,479
Adeje	19,862	95,095	88,350	763,539	79.13	77.75	87.58	7.41	8,814
Pájara	10,781	74,148	61,583	656,795	79.39	78.77	88.52	8.46	5,473
Lloret De Mar	31,520	107,987	99,718	577,926	76.89	76.16	83.56	4.86	3,055
Sant Llorenç Des Cardassar	2,014	68,696	11,813	561,219	78.62	77.94	87.13	8.10	3,804

\*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	%
<b>TOTAL</b>	<b>11,005,081</b>	<b>100.00</b>	<b>37,818,032</b>	<b>100.00</b>
Residentes en España	4,834,460	43.93	11,410,177	30.17
Residentes en el extranjero	6,170,622	56.07	26,407,856	69.83
TOTAL residentes en el extranjero	6,170,622	100.00	26,407,856	100.00
TOTAL residentes en U.E. (sin España)	4,413,377	71.52	21,311,330	80.70
- Alemania	969,259	15.71	5,791,211	21.93
- Austria	55,318	0.90	243,876	0.92
- Bélgica	155,595	2.52	742,043	2.81
- Dinamarca	63,325	1.03	267,519	1.01
- Finlandia	30,343	0.49	114,944	0.44
- Francia	598,092	9.69	1,842,902	6.98
- Grecia	14,328	0.23	31,357	0.12
- Irlanda	121,034	1.96	535,444	2.03
- Italia	292,244	4.74	981,742	3.72
- Luxemburgo	10,340	0.17	55,046	0.21
- Países Bajos	237,234	3.84	1,092,916	4.14
- Polonia	119,844	1.94	656,745	2.49
- Portugal	171,071	2.77	524,788	1.99
- Reino Unido	1,281,844	20.77	7,139,598	27.04
- República Checa	43,454	0.70	229,504	0.87
- Suecia	113,163	1.83	516,834	1.96
- Resto de la UE*	136,891	2.22	544,860	2.06
Noruega	66,428	1.08	286,106	1.08
Rusia	128,314	2.08	828,948	3.14
Suiza	118,958	1.93	490,084	1.86
Resto de Europa	116,124	1.88	467,457	1.77
Japón	56,242	0.91	110,070	0.42
Estados Unidos	331,624	5.37	747,681	2.83
Resto de América	385,447	6.25	906,652	3.43
Países africanos	73,255	1.19	251,193	0.95
Resto del mundo	480,852	7.79	1,008,333	3.82

\*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

September 2018

Provisional data

### National ADR and RevPAR<sup>(\*)</sup> and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
<b>TOTAL</b>	<b>90.29</b>	<b>0.78</b>	<b>68.62</b>	<b>-0.15</b>
Andalucía	93.75	2.04	70.13	1.10
Aragón	55.81	3.86	29.89	10.48
Asturias, Principado de	61.42	3.88	34.88	9.03
Balears, Illes	103.97	3.50	92.20	2.05
Canarias	91.22	-0.41	78.81	-3.39
Cantabria	68.10	4.56	43.25	10.20
Castilla y León	58.69	0.85	30.54	1.64
Castilla - La Mancha	56.37	1.34	23.08	0.09
Cataluña	92.81	-1.20	71.24	-3.20
Comunitat Valenciana	82.38	1.78	63.86	1.28
Extremadura	57.16	3.30	26.57	6.38
Galicia	58.24	1.19	30.07	2.18
Madrid, Comunidad de	90.65	-8.05	72.14	-9.13
Murcia, Región de	66.78	2.61	42.03	8.01
Navarra, Comunidad Foral de	66.06	2.04	42.09	1.01
País Vasco	102.84	10.25	81.97	13.78
Rioja, La	66.19	3.46	43.16	-0.40
Ceuta	69.49	1.51	46.11	8.17
Melilla	67.86	2.59	48.79	-3.31

### National ADR and RevPar<sup>(\*)</sup> and breakdown by categories

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
<b>TOTAL</b>	<b>90.29</b>	<b>0.78</b>	<b>68.62</b>	<b>-0.15</b>
<b>HOTELS: Gold stars</b>				
Five	187.41	-3.08	141.75	-6.19
Four	97.80	0.67	82.44	-1.01
Three	75.71	1.46	60.93	0.09
Two	63.59	4.45	39.25	4.71
One	62.70	6.31	32.88	7.34
<b>GUESTHOUSES: Silver stars</b>				
Three and two	58.22	4.68	28.34	6.26
One	52.23	1.78	25.93	8.22

(\*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

## Hotel Price Index (HPI). 2008 Base

September 2018

Provisional data

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

	Index	Annual growth rate
<b>TOTAL</b>	<b>112.60</b>	<b>0.59</b>
Andalucía	105.92	1.64
Aragón	70.56	2.10
Asturias, Principado de	96.25	4.07
Balears, Illes	134.50	1.50
Canarias	121.01	0.47
Cantabria	98.31	5.60
Castilla y León	95.17	1.39
Castilla - La Mancha	85.52	-0.12
Cataluña	110.86	-1.11
Comunitat Valenciana	108.74	2.69
Extremadura	94.80	5.98
Galicia	97.41	0.63
Madrid, Comunidad de	90.02	-5.91
Murcia, Región de	89.23	2.85
Navarra, Comunidad Foral de	90.17	1.21
País Vasco	118.89	8.12
Rioja, La	92.26	2.29
Ceuta	94.45	-1.52
Melilla	102.33	2.90

### National General Index and breakdown by categories

	Index	Annual growth rate
<b>TOTAL</b>	<b>112.60</b>	<b>0.59</b>
<b>HOTELS: Gold stars</b>		
Five	102.51	-1.19
Fourth	109.61	0.30
Three	121.35	0.75
Two	111.66	6.03
One	122.29	1.39
<b>HOSTALS: Silver stars</b>		
Three and two	105.83	-0.56
One	119.60	6.63