

23 October 2019

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
September 2019 Provisional data

Overnight stays in hotel establishments decrease by 0.6% in September as compared with the same month of 2018

Hotels invoice an average of 94.2 euros per occupied room, representing an annual increase of 4.4%

During the month of September overnight stays in hotel establishments exceeded 37.5 million, 0.6% less than in the same month of 2018. Overnight stays by residents in Spain increased by 1.3%, while those by non-residents decreased by 1.4%.

The average stay decreased 0.8% as compared with September 2018, and stood at 3.4 overnight stays per traveller.

During the first nine months of 2019, overnight stays increased by 1.3% as compared with the same period of the previous year.

Annual variation rate for overnight stays

Percentage

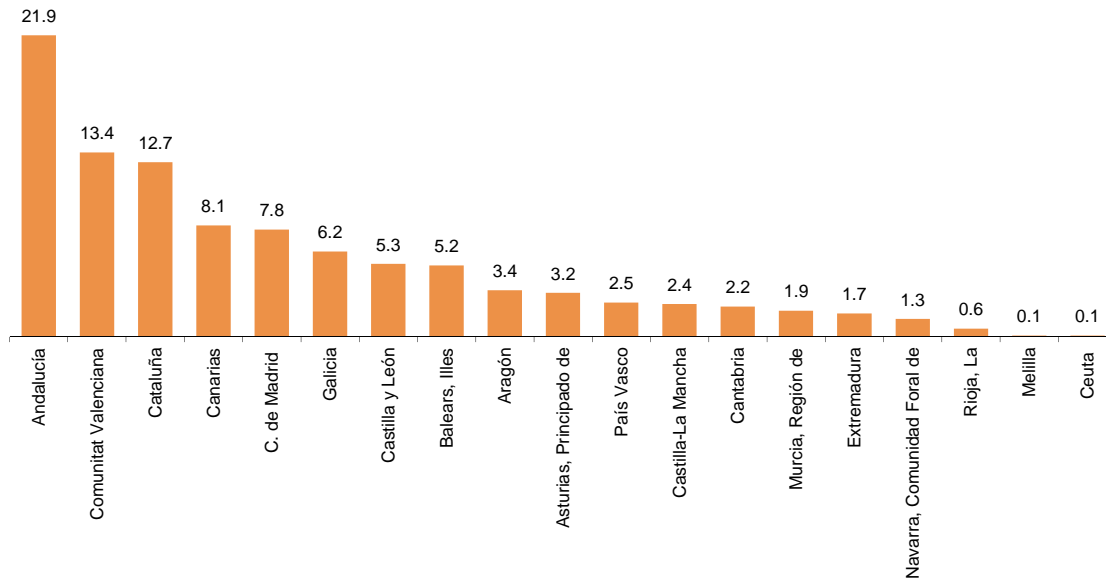


Destinations

Andalucía, Comunitat Valenciana and Cataluña were the main destinations of Spanish residents in September, with annual variation rates in the number of overnight stays of 5.4%, 0.3% and -3.4% respectively.

Distribution of overnight stays: residents

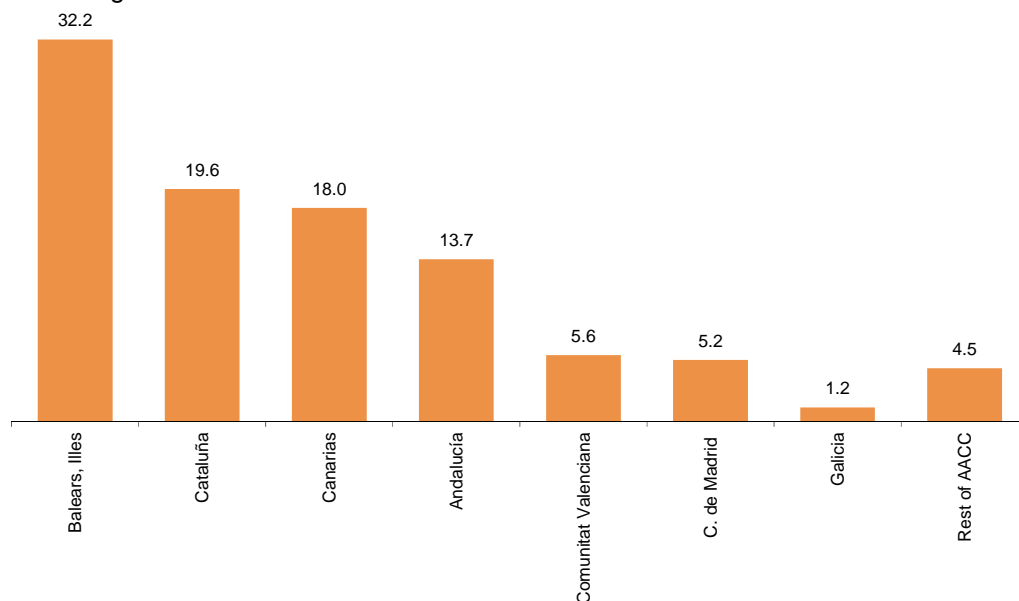
Percentage



The main destination chosen by non-residents was Illes Balears, with 32.2% of total overnight stays. In this Autonomous Community, overnight stays of foreigners decreased by 2.7% as compared to September 2018. The following destinations of non-residents were Cataluña (with 19.6% of the total overnight stays and an increase of 0.1%) and Canarias (with 18.0% of the total and a decrease of 5.4%).

Distribution of overnight stays: non-residents

Percentage

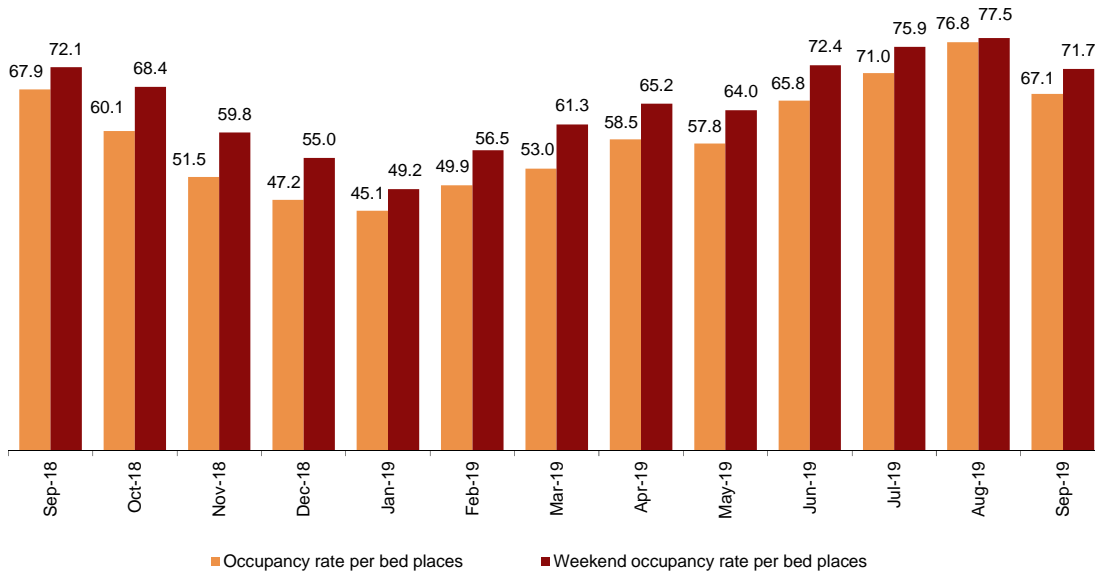


Hotel occupancy

In September, 67.1% of the available bed-places were covered, with an annual decrease of 1.2%. The weekend occupancy rate by bed-places decreased by 0.5%, standing at 71.7%.

Occupancy rate

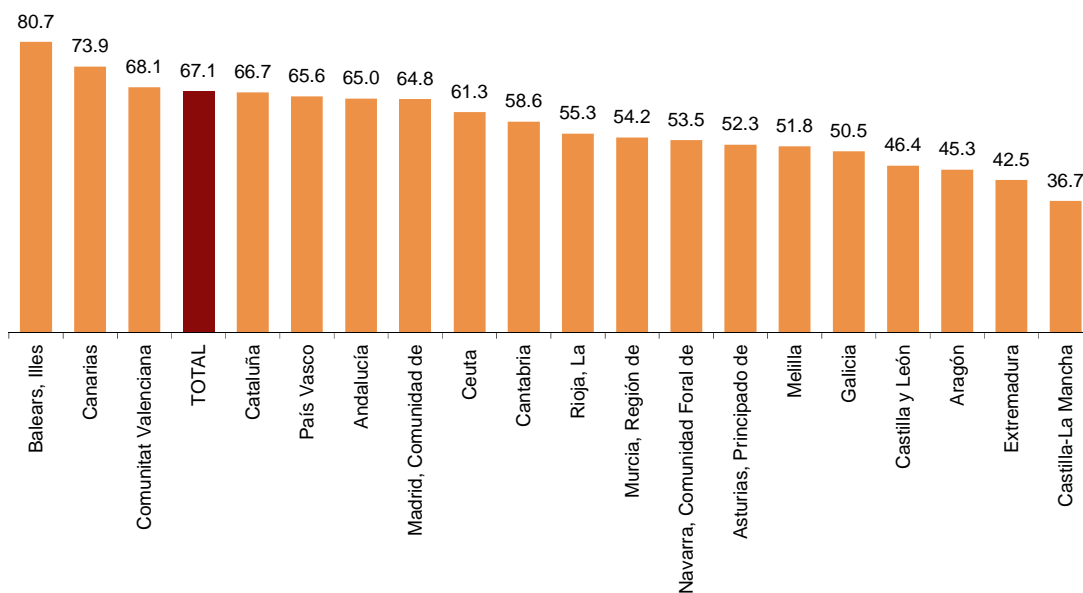
Percentage



Illes Balears showed the highest occupancy rate by bed-places in September (80.7%). It was followed by Canarias (73.9%) and Comunitat Valenciana (68.1%).

Occupancy rate per bed-places by Autonomous Community

Percentage



By tourist areas, Palma-Calvià reached both the greatest occupancy rate by bed-places (82.4%), and the greatest weekend occupancy rate (84.2%). The island of Mallorca registered the highest number of overnight stays, with 6.7 million.

The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Cambrils had both the greatest occupancy rate by bedplaces (92.7%) and the greatest weekend occupancy rate (91.5%).

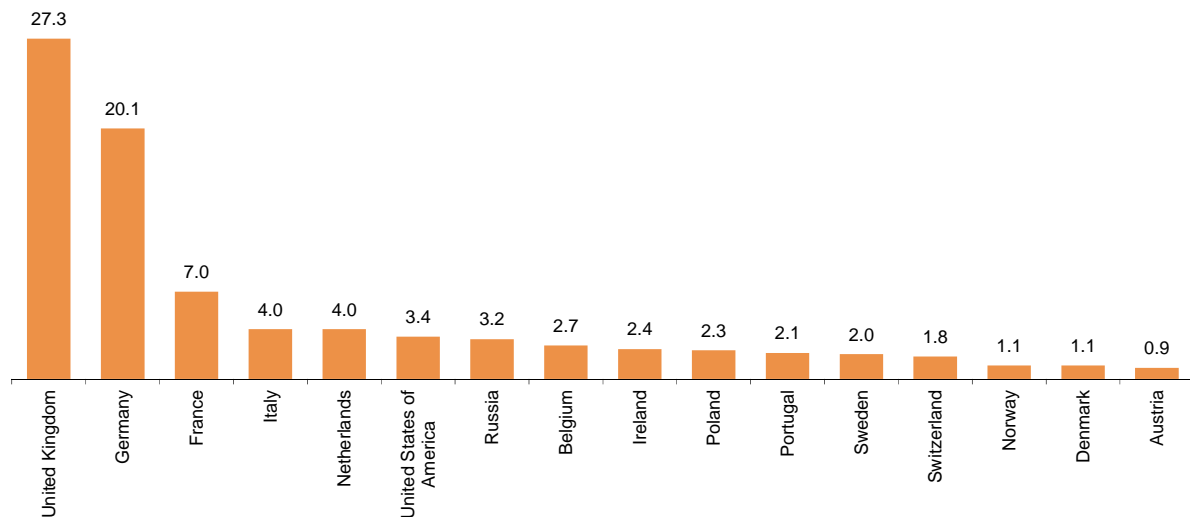
Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany accounted for 27.3% and 20.1%, respectively, of total overnight stays of non-residents in hotel establishments in September. The British market presents an annual variation rate of 0.0% and the German market; -10.2%.

Overnight stays of travellers from France, Italy, and Netherlands (the following countries of origin) registered annual rates of -1.6%, 6.8% and -6.4% respectively.

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

Percentage

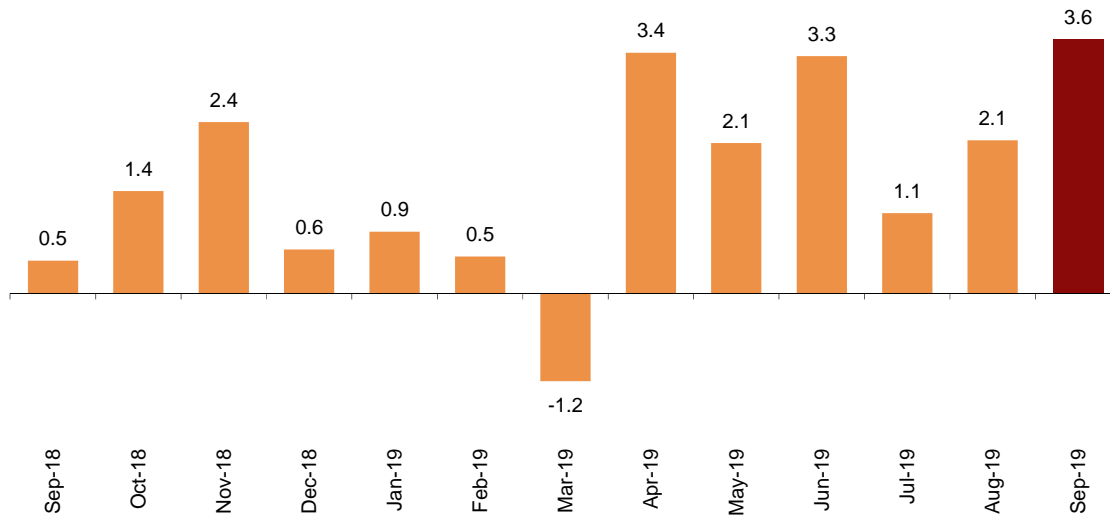


Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 3.6% in September, which is 1.5 points more than that registered last month and 3.1 points above that registered one year ago.

Hotel Prices Index

Annual variation rate. Percentage



By Autonomous Community, the greatest increases in the annual rate of hotel prices were in Comunidad de Madrid (7.4%) and Cataluña (6.2%).

By categories, the largest price increase took place in the three and two-silver star establishments (6.7%).

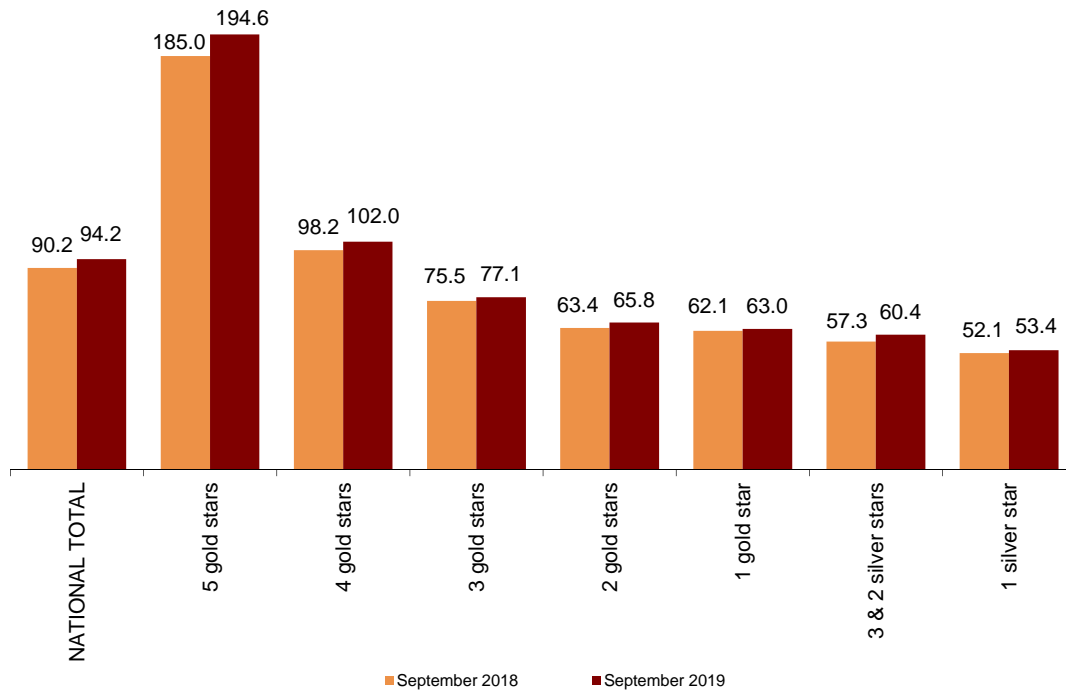
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 94.2 euros in September, which means an increase of 4.4% as compared with the same month of 2018.

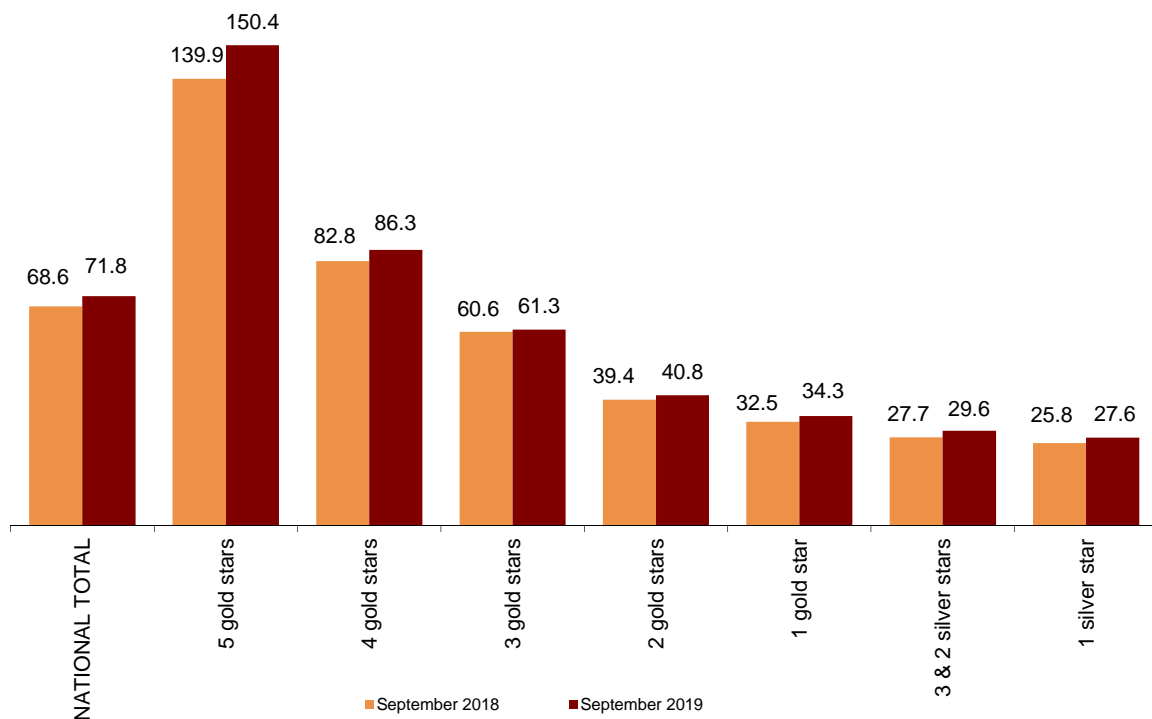
On the other hand, the average daily revenue per available room (RevPAR), which is determined by the occupancy registered in hotel establishments, reached 71.8 Euros, increasing by 4.8%.

By category, the average rate was 194.6 euros for five-star hotels, 102.0 euros for four-star hotels and 77.1 euros for three-star hotels. Revenues per available room for these same categories were 150.4, 86.3 and 61.3 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 2018 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 comprehensive 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 2019

Provisional Data

23rd October 2019

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	11,020,402	4,815,168	6,205,234	37,551,418	11,560,035	25,991,383	3.41
HOTELS: Golden stars							
Five	648,687	175,022	473,664	2,270,894	403,399	1,867,495	3.50
Four	5,091,637	2,061,759	3,029,878	18,854,613	5,293,848	13,560,766	3.70
Three	2,998,350	1,304,804	1,693,546	11,054,995	3,266,490	7,788,505	3.69
Two	858,612	472,135	386,477	2,142,820	973,067	1,169,753	2.50
One	351,392	193,406	157,986	803,416	383,099	420,317	2.29
INNS: Silver stars							
Two and three	565,731	346,646	219,086	1,173,454	648,370	525,084	2.07
One	505,993	261,395	244,598	1,251,226	591,763	659,463	2.47
Annual rate	0.18	-0.52	0.73	-0.58	1.31	-1.39	-0.75
Cumulative annual rate	3.31	3.52	3.11	1.25	3.60	0.04	-1.99

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	16,541	869,784	1,831,780	67.09	71.73	76.08	274,467
HOTELS: Golden stars							
Five	346	52,490	113,182	66.26	71.02	77.16	38,787
Four	2,711	387,161	844,798	72.90	77.01	84.30	136,026
Three	2,940	237,327	503,740	71.58	75.14	79.79	66,247
Two	2,131	66,154	130,437	54.31	62.43	61.99	13,013
One	1,323	29,184	57,207	46.67	54.60	53.95	5,013
INNS: Silver stars							
Two and three	3,182	49,224	93,698	41.46	49.29	47.78	8,067
One	3,908	48,245	88,718	46.34	51.35	52.16	7,315
Annual rate	0.39	0.41	0.91	-1.21	-0.48	0.26	2.72

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		
Tourist area with a greater occupancy rate per month									
Palma - Calvià	50,057	468,563	155,760	2,491,226	82.44	84.23	87.91	5.10	18,689
Isla de Mallorca	92,690	1,031,715	342,236	6,387,621	81.76	81.95	89.24	5.99	45,207
Islas de Ibiza-Formentera	42,444	278,489	143,072	1,408,827	80.69	80.27	85.16	4.84	10,897
Sur de Gran Canaria	47,207	124,276	201,063	1,117,655	77.37	78.14	86.84	7.69	11,022
Isla de Lanzarote	25,258	92,697	128,987	764,148	76.33	76.44	89.50	7.57	7,174
Costa de Gipuzkoa	29,240	51,326	58,419	114,471	76.06	83.05	87.28	2.15	1,358
Isla de Gran Canaria	68,314	134,322	258,725	1,162,756	75.33	76.95	85.05	7.01	11,949
Sur de Tenerife	48,483	182,320	205,550	1,449,760	75.29	76.29	84.72	7.17	15,753

Tourist area with a greater number of overnight stays per month¹

Isla de Tenerife	97,704	219,060	392,383	1,715,249	74.45	76.30	83.06	6.65	19,493
Costa del Sol	160,241	383,191	464,684	1,638,323	73.80	77.30	86.87	3.87	16,353
Barcelona	110,772	659,836	193,518	1,743,117	72.74	76.29	87.26	2.51	16,173
Costa Blanca	193,922	209,634	726,922	974,897	74.56	77.98	81.11	4.22	10,454
Costa Brava	152,573	272,534	375,633	1,106,038	63.77	69.04	71.11	3.49	9,355
Costa Daurada	152,105	176,547	403,364	1,049,886	71.22	78.34	81.77	4.42	7,293
Costa Barcelona	118,192	257,980	252,443	1,117,398	72.06	73.01	81.82	3.64	8,000
Isla de Fuerteventura	23,043	107,190	114,926	965,960	71.49	72.07	83.57	8.30	8,468

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

Tourist site with a greater occupancy rate per month

Cambrils	12,404	19,699	49,258	149,388	92.75	91.47	93.05	6.19	1,033
Malgrat de Mar	5,237	22,542	16,809	156,701	87.08	84.35	90.92	6.25	813
Muro	3,288	61,800	10,678	419,374	85.56	82.61	92.58	6.61	2,811
Santa Margalida	2,524	44,048	11,708	330,255	84.55	81.06	92.32	7.34	2,085
Santa Susanna	9,569	38,523	26,869	256,335	83.95	80.32	87.71	5.89	1,336
Sóller	1,581	17,510	3,508	62,228	83.76	83.72	84.25	3.44	765
Benalmádena	19,088	43,669	74,240	291,162	82.94	84.59	93.90	5.82	2,142
Santa Eulària des Riu	7,335	61,700	28,011	396,117	82.78	80.73	88.47	6.14	2,709
Santanyí	5,089	48,657	20,278	348,699	82.28	82.68	88.63	6.87	2,502
Calvià	14,974	218,109	65,147	1,304,404	82.22	83.76	87.11	5.88	9,444

Tourist site with a greater number of overnight stays per month¹

Barcelona	100,507	629,242	177,165	1,675,034	74.01	77.40	87.89	2.54	15,527
Madrid	331,296	495,180	581,406	1,234,932	68.20	74.34	84.23	2.20	12,466
Palma de Mallorca	40,301	244,857	108,494	1,095,007	81.96	83.10	88.83	4.22	8,575
Benidorm	93,928	114,652	475,737	650,512	81.23	83.57	85.47	5.40	6,353
San Bartolomé de Tirajana	35,645	84,961	152,719	793,860	79.97	81.15	87.56	7.85	8,440
Salou	59,082	105,615	179,626	721,139	78.51	83.78	88.68	5.47	3,609
Adeje	20,868	95,108	94,061	769,665	76.28	77.31	86.05	7.45	8,896
Lloret de Mar	29,370	109,848	101,505	588,656	79.19	79.70	84.98	4.96	3,300
Pájara	13,054	66,277	69,766	608,130	75.93	77.70	85.12	8.55	5,131
Sant Llorenç des Cardassar	2,773	71,354	12,412	567,860	81.31	77.49	88.43	7.83	3,901

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

8. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	11,020,402	100.00	37,551,418	100.00
Residentes en España	4,815,168	43.69	11,560,035	30.78
Residentes en el extranjero	6,205,234	56.31	25,991,383	69.22
TOTAL residentes en el extranjero	6,205,234	100.00	25,991,383	100.00
TOTAL residentes en U.E. (sin España)	4,324,577	69.69	20,645,502	79.43
- Alemania	901,150	14.52	5,211,650	20.05
- Austria	56,033	0.90	231,828	0.89
- Bélgica	152,276	2.45	702,099	2.70
- Dinamarca	60,122	0.97	274,418	1.06
- Finlandia	29,485	0.48	111,219	0.43
- Francia	573,319	9.24	1,828,949	7.04
- Grecia	11,885	0.19	32,896	0.13
- Irlanda	131,533	2.12	617,038	2.37
- Italia	309,693	4.99	1,049,787	4.04
- Luxemburgo	9,549	0.15	56,804	0.22
- Países Bajos	226,842	3.66	1,025,652	3.95
- Polonia	113,988	1.84	597,744	2.30
- Portugal	172,505	2.78	545,700	2.10
- Reino Unido	1,286,856	20.74	7,087,156	27.27
- República Checa	40,689	0.66	230,699	0.89
- Suecia	108,964	1.76	508,455	1.96
- Resto de la UE ¹	139,688	2.25	533,407	2.05
Noruega	63,185	1.02	282,340	1.09
Rusia	134,231	2.16	833,226	3.21
Suiza	112,405	1.81	455,988	1.75
Resto de Europa	131,234	2.11	539,270	2.07
Japón	62,878	1.01	129,012	0.50
Estados Unidos	395,856	6.38	888,734	3.42
Resto de América	426,169	6.87	1,056,067	4.06
Países africanos	72,392	1.17	177,290	0.68
Resto del mundo	482,307	7.77	983,955	3.79

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

Hotel Price Index (HPI). 2008 Base September 2019

Provisional data

1. National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	116.49	3.56
Andalucía	106.28	0.40
Aragón	72.60	3.15
Asturias, Principado de	96.26	0.05
Balears, Illes	140.09	4.49
Canarias	124.25	2.44
Cantabria	97.04	-1.42
Castilla y León	96.23	1.05
Castilla - La Mancha	88.76	3.42
Cataluña	117.46	6.22
Comunitat Valenciana	109.43	1.21
Extremadura	94.75	0.09
Galicia	101.41	3.65
Madrid, Comunidad de	97.15	7.44
Murcia, Región de	88.90	-0.22
Navarra, Comunidad Foral de	92.24	2.12
País Vasco	122.29	2.41
Rioja, La	96.64	4.74
Ceuta	92.57	-2.14
Melilla	103.83	1.47

2. National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	116.49	3.56
HOTELS: Gold stars		
Five	104.41	2.34
Fourth	113.19	3.31
Three	126.81	4.73
Two	114.67	2.73
One	126.01	3.07
HOSTALS: Silver stars		
Three and two	114.24	6.67
One	122.29	1.49

Indicators on the Profitability of the Hotel Sector

September 2019

Provisional data

National ADR and RevPAR¹ and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	94.17	4.36	71.83	4.77
Andalucía	93.57	0.33	71.25	2.36
Aragón	58.35	4.89	31.82	6.33
Asturias, Principado de	60.51	-1.44	35.29	1.55
Balears, Illes	106.51	2.72	93.76	1.89
Canarias	94.61	2.79	79.37	-0.65
Cantabria	69.05	0.13	43.61	0.05
Castilla y León	58.90	0.31	31.39	2.75
Castilla - La Mancha	57.77	1.91	24.86	6.18
Cataluña	103.65	11.66	80.16	12.83
Comunitat Valenciana	83.47	1.41	64.21	1.01
Extremadura	56.84	-1.13	27.87	5.26
Galicia	60.52	3.77	33.58	11.19
Madrid, Comunidad de	100.57	11.27	81.52	12.96
Murcia, Región de	67.79	1.97	41.48	-0.22
Navarra, Comunidad Foral de	65.51	-0.37	41.90	0.87
País Vasco	108.97	6.25	86.83	6.63
Rioja, La	70.61	6.63	46.90	8.12
Ceuta	66.99	-2.15	40.55	-15.91
Melilla	71.95	6.03	51.24	5.02

¹ ADR: Average Daily Rate

RevPAR: Revenue per Available Room

National ADR and RevPar¹ and breakdown by categories

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	94.17	4.36	71.83	4.77
HOTELS: Gold stars				
Five	194.60	5.19	150.44	7.57
Four	102.04	3.92	86.30	4.23
Three	77.12	2.19	61.34	1.18
Two	65.79	3.76	40.80	3.57
One	62.96	1.31	34.28	5.49
GUESTHOUSES: Silver stars				
Three and two	60.42	5.45	29.60	7.00
One	53.43	2.49	27.55	6.74

¹ ADR: Average Daily Rate

RevPAR: Revenue per Available Room