

23 November 2018

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

Overnight stays in hotel establishments register an increase of 0.8% in October, as compared to the same month of 2017

Hotels invoice an average of 83.7 euros per occupied room, representing an annual increase of 2.2%

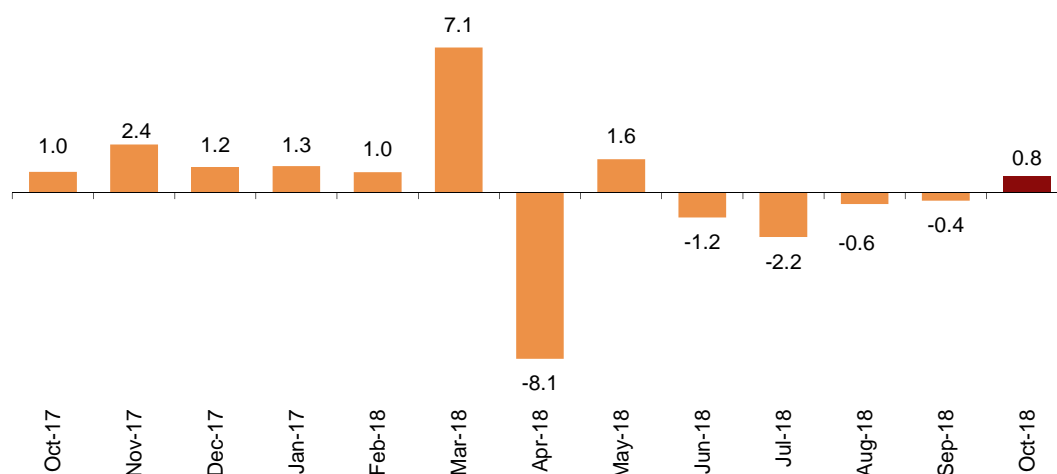
In October, overnight stays in hotel establishments exceeded 31.1 million, 0.8% more than in the same month of 2017. Overnight stays by residents in Spain increased by 0.2% and those of non-residents did so by 1.0%.

The average stay decreased by 1.5% as compared with October 2017, standing at 3.2 overnight stays per traveller.

During the first 10 months of 2018, overnight stays decreased by 0.5% as compared with the same period of the previous year.

Annual variation rate for overnight stays

Percentage

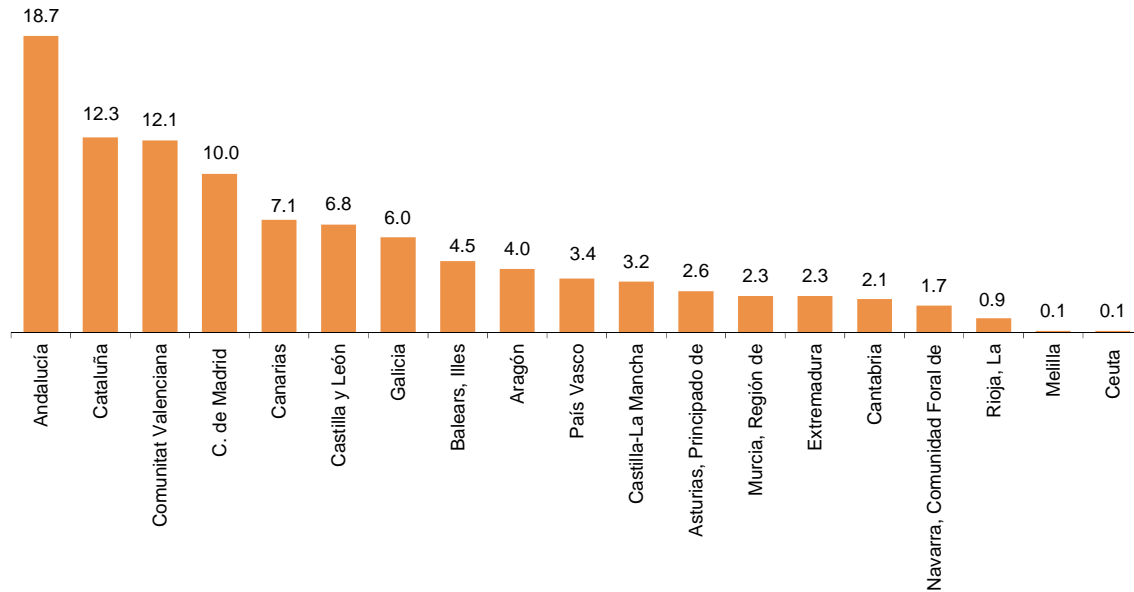


Destinations

In October, Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of residents in Spain, with annual variation rates for overnight stays of 2.6%, -4.2%, -3.3% and 1.3%, respectively.

Distribution of overnight stays: residents

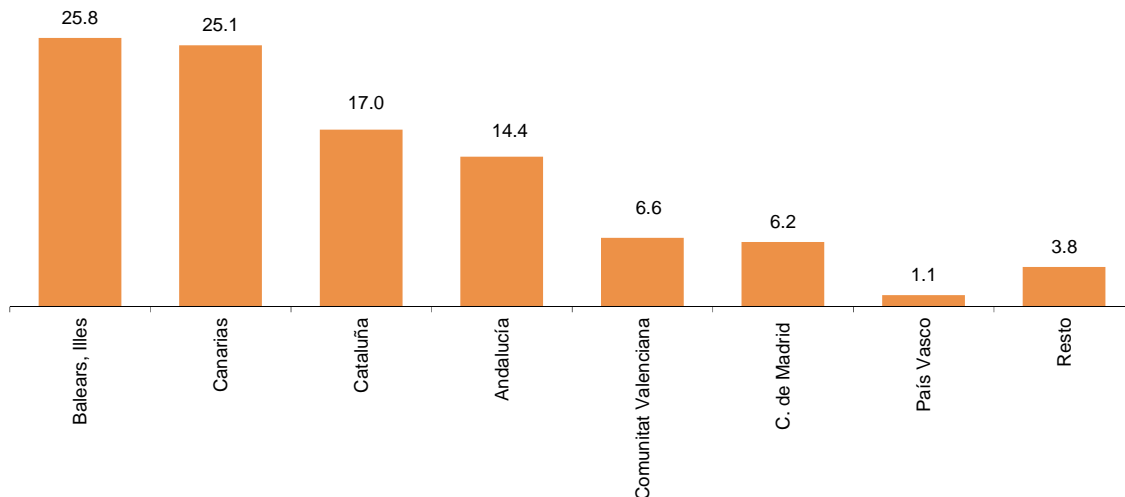
Percentage



The main destination chosen by non-residents was Illes Balears, with 25.8% of total overnight stays. In this Autonomous Community, overnight stays of foreign nationals decreased by 2.2% as compared with October 2017. The following destinations of non-residents were Canarias (with 25.1% of the total overnight stays and an decrease of 2.5%) and Cataluña (with 17.0% of the total and an increase of 10.6%).

Distribution of overnight stays: non-residents

Percentage

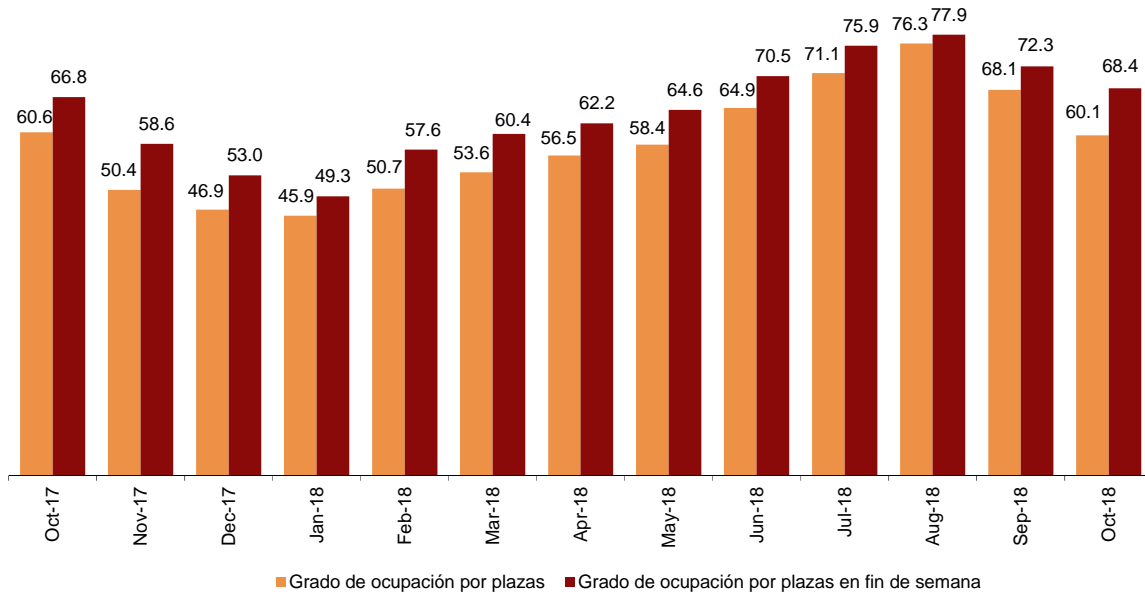


Hotel occupancy

In October, 60.1% of the available bed-places were occupied, indicating an annual decrease of 0.8%. The weekend occupancy rate by bed-places increased 2.3%, standing at 68.4%.

Occupancy rate

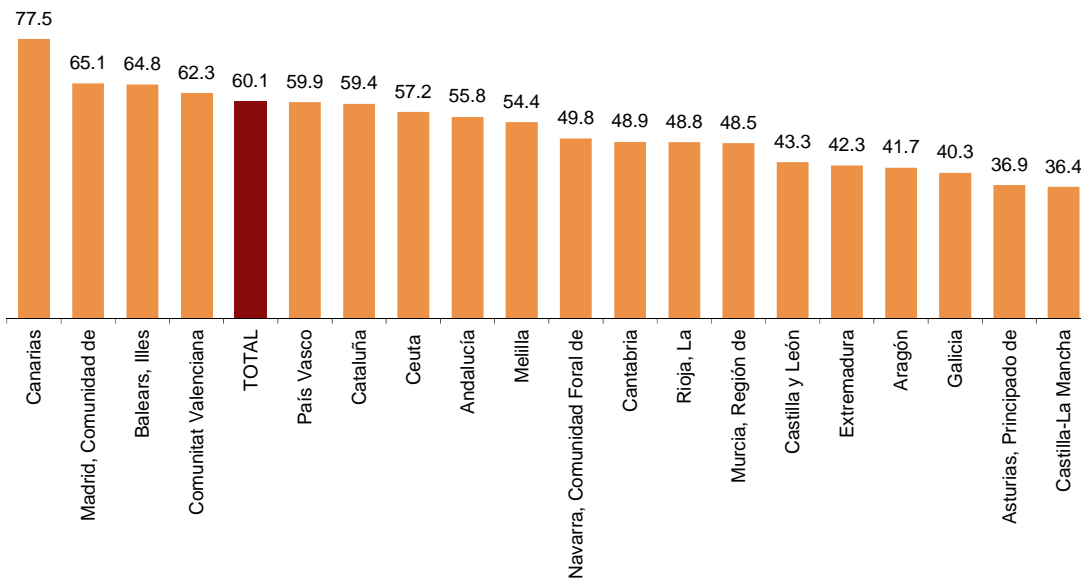
Percentage



Canarias showed the highest occupancy rate by bed-places in October (77.5%). It is followed by Community of Madrid (65.1%) and Illes Balears (64.8%).

Occupancy rate per bed places by autonomous community

Percentage



By tourist areas, the South of Tenerife reached both the highest occupancy rate by bed-places (81.7%), and the highest weekend occupancy rate (83.5%). The island of Mallorca registered the highest number of overnight stays, with 4.8 million.

The tourist places with more overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Arona reached both the greatest occupancy rate by bed-places (83.9%), as the greatest weekend occupancy rate (87.1%).

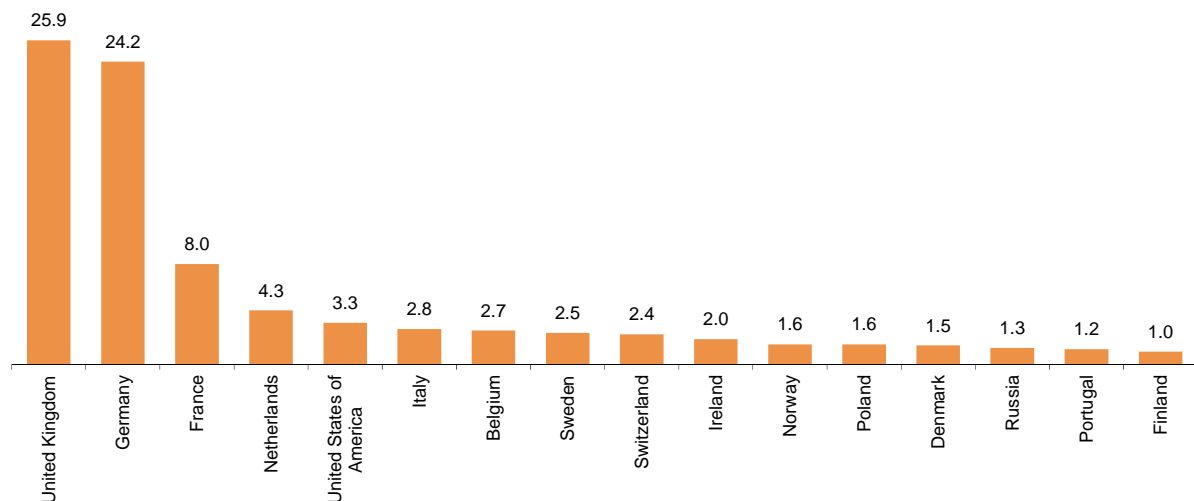
Overnight stays according to the country of origin of the travellers

In October, travellers from the United Kingdom and Germany concentrated 25.9% and 24.2% of total overnight stays of non-residents in hotel establishments, respectively. The British market increased by 4.4%, while the German decreased by 8.5%.

Overnight stays of travellers from France, the Netherlands and the United States (the following countries of origin) registered annual rates of 9.3%, -4.0% and 10.8%, respectively.

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

Percentage

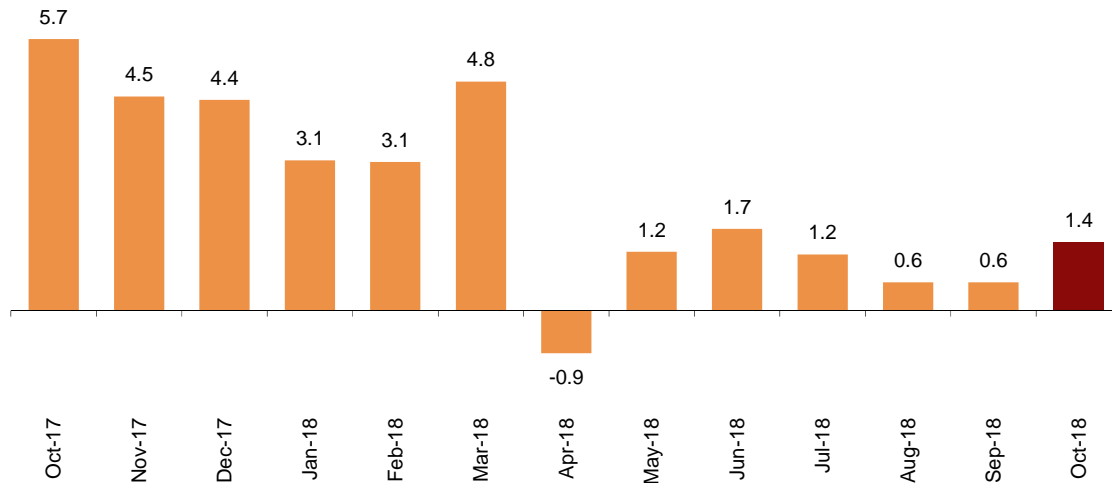


Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 1.4% in October, which is 0.8 points more than last month and 4.3 points below that registered a year ago.

Hotel Prices Index

Annual variation rate. Percentage



In October, Canarias, Illes Balears, Cataluña and Andalucía were the Autonomous Communities with the greatest weighting in the HPI (they represented 71.0% of the total weight). Hotel prices increased by 1.3% in the annual rate in Andalucía, 0.7% in Illes Balears and 0.6% in Canarias. In turn, they fell by 0.3% in Cataluña.

By category, prices rose in one-silver-star establishments (5.1%), three and two-silver-star establishments (2.5%), four-gold-star establishments (2.2%), two-gold-star establishments (2.1%) and in five-gold-star establishments (0.6%).

On the other hand, prices remained unchanged in one-gold-star establishments and decreased in three-gold-star establishments (0.4%).

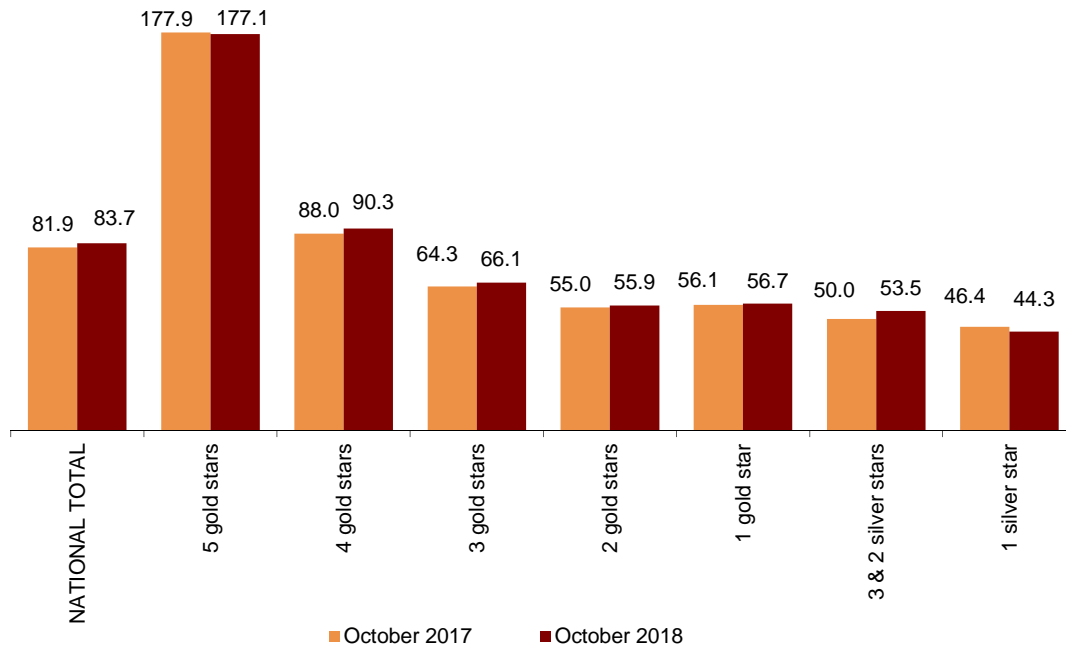
Profitability of the Hotel Sector

The average daily rate of hotels per occupied room (ADR) in October was 83.7 euros, representing an increase of 2.2% as compared to the same month of 2017.

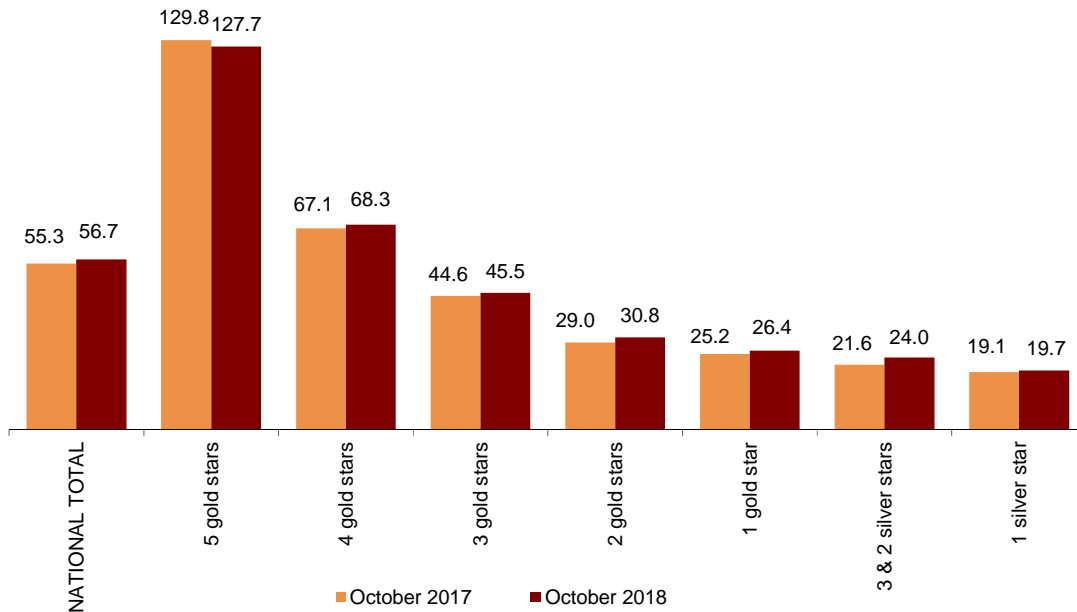
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 56.7 euros, with a 2.5% increase.

By category, the average rate was 177.1 euros for five-star hotels, 90.3 euros for four-star hotels and 66.1 euros for three-star hotels. Revenues per available room for these same categories were 127.7, 68.3 and 45.5 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 October 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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Press office: Telephone numbers: (+34) 91 583 93 63 /94 08 – gprensa@ine.es

Information Area: Telephone number: (+34) 91 583 91 00 – www.ine.es/infoine/?L=1

Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

October 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	
TOTAL	9,674,718	4,358,418	5,316,300	31,139,207	9,277,634	21,861,573	3.22
HOTELS: Golden stars							
Five	581,581	159,692	421,889	2,031,410	320,973	1,710,438	3.49
Four	4,625,977	1,870,447	2,755,530	16,029,380	4,062,453	11,966,926	3.47
Three	2,539,525	1,160,899	1,378,626	8,863,159	2,648,415	6,214,744	3.49
Two	728,090	444,253	283,836	1,655,744	847,409	808,335	2.27
One	264,377	162,579	101,798	565,985	308,698	257,286	2.14
INNS: Silver stars							
Two and three	508,217	324,094	184,122	1,000,816	596,344	404,472	1.97
One	426,953	236,454	190,499	992,715	493,341	499,373	2.33
Annual rate	2.29	1.30	3.11	0.78	0.20	1.03	-1.48
Cumulative annual rate	0.88	0.99	0.77	-0.47	0.30	-0.85	-1.34

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	15,192	786,503	1,641,220	60.10	68.38	68.08	235,892
HOTELS: Golden stars							
Five	319	48,598	103,141	62.47	69.29	71.78	33,708
Four	2,480	355,725	769,916	65.84	73.29	76.26	118,192
Three	2,640	208,852	438,776	63.77	71.90	69.86	56,168
Two	1,916	57,628	111,725	47.42	60.27	54.94	10,534
One	1,170	24,336	48,049	37.85	48.95	44.95	4,043
INNS: Silver stars							
Two and three	2,982	45,606	86,280	37.24	48.57	43.59	7,094
One	3,685	45,758	83,334	38.24	45.91	45.68	6,153
Annual rate	-0.04	1.46	1.69	-0.84	2.31	0.23	3.08

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 Tenerife	29,921	220,157	126,580	1,629,640	81.72	83.51	87.90	7.02	15,174
Isla de Lanzarote	20,925	113,490	103,119	877,389	80.96	82.17	90.20	7.29	7,258
Sur de Gran Canaria	27,320	178,336	116,589	1,432,531	80.60	81.06	86.76	7.53	11,627
Isla de Tenerife	73,657	262,698	289,732	1,912,538	78.52	80.97	84.32	6.55	19,100
Isla de Gran Canaria	50,150	193,015	169,851	1,495,167	78.50	79.55	85.46	6.85	12,598
Isla de Fuerteventura	17,664	136,919	65,628	1,122,296	74.96	74.65	82.80	7.68	8,588
Barcelona	139,369	638,372	247,776	1,652,854	72.16	77.80	85.08	2.44	14,840
Costa Blanca	155,408	203,648	577,655	1,023,138	71.36	79.91	77.40	4.46	9,793

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

Isla de Mallorca	100,043	708,786	285,752	4,538,514	66	68	70	6	36,374
Palma - Calvià	55,477	343,125	167,375	1,708,629	67	72	71	5	14,885
Costa del Sol	123,890	331,255	296,299	1,480,341	63	71	76	4	13,471
Costa Brava	104,976	213,798	207,131	769,430	54	66	59	3	7,197
Costa Barcelona	124,007	206,555	241,924	714,013	61	64	72	3	5,841
Islas de Ibiza-Formentera	23,237	140,645	61,811	813,892	67	70	66	5	7,522
Costa Daurada	114,650	109,917	236,432	542,315	55	68	62	3	4,105
Costa de la Luz (Cádiz)	108,402	92,235	232,847	400,932	54	67	65	3	5,758

Tourist site with a greater occupancy rate per month

Arona	5,501	64,956	31,808	492,043	83.91	87.07	90.23	7.44	3,400
Tías	3,207	33,741	18,504	262,115	83.50	85.26	92.12	7.59	1,713
Sóller	1,026	14,361	1,756	61,491	83.10	87.00	81.24	4.11	649
Adeje	12,618	121,140	56,789	889,420	82.74	83.52	88.66	7.07	8,913
Yaiza	8,056	52,031	50,060	402,478	81.98	82.43	91.05	7.53	3,771
San Bartolomé de Tirajana	21,323	127,181	88,750	1,040,877	81.49	82.28	87.07	7.61	9,115
Benidorm	71,583	110,168	396,316	686,584	78.69	85.47	83.30	5.96	5,963
Mogán	6,168	51,436	27,052	392,869	78.24	77.69	85.93	7.29	2,495
Teguise	6,039	26,450	25,804	204,507	77.98	79.17	88.84	7.09	1,625
Puerto de La Cruz	26,365	30,464	120,235	241,645	75.93	79.09	78.70	6.37	2,989

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

Madrid	376,777	527,623	620,115	1,213,884	67.76	77.37	85.88	2.03	11,817
Barcelona	124,035	613,908	218,786	1,597,482	73.12	78.64	85.49	2.46	14,135
Calvià	17,043	137,068	72,681	855,608	65.79	67.28	68.98	6.02	7,202
Palma de Mallorca	39,627	221,765	82,820	807,945	67.23	78.26	72.86	3.41	7,105
Pájara	7,281	78,036	33,469	676,866	75.82	74.43	81.52	8.33	5,196
Sevilla	101,671	154,891	187,075	347,810	75.59	86.69	87.93	2.08	3,768
Lloret de Mar	26,785	86,477	68,112	420,951	66.03	75.53	71.72	4.32	2,434
Torremolinos	18,910	74,847	60,946	397,072	72.03	81.72	81.42	4.89	2,693
Salou	37,952	57,560	103,426	343,872	62.17	72.57	67.01	4.68	2,036
Sant Llorenç des Cardassar	4,518	41,379	12,344	434,135	63.14	55.50	68.51	9.73	3,787

*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	9,674,718	100.00	31,139,207	100.00
Residentes en España	4,358,418	45.05	9,277,634	29.79
Residentes en el extranjero	5,316,300	54.95	21,861,573	70.21
TOTAL residentes en el extranjero	5,316,300	100.00	21,861,573	100.00
TOTAL residentes en U.E. (sin España)	3,716,761	69.91	17,657,234	80.77
- Alemania	844,853	15.89	5,282,941	24.17
- Austria	49,172	0.92	186,088	0.85
- Bélgica	127,320	2.39	583,121	2.67
- Dinamarca	69,290	1.30	321,456	1.47
- Finlandia	48,867	0.92	225,480	1.03
- Francia	565,646	10.64	1,739,410	7.96
- Grecia	12,203	0.23	31,203	0.14
- Irlanda	96,930	1.82	427,626	1.96
- Italia	220,546	4.15	613,552	2.81
- Luxemburgo	7,776	0.15	38,109	0.17
- Países Bajos	212,300	3.99	930,257	4.26
- Polonia	70,922	1.33	339,710	1.55
- Portugal	129,516	2.44	259,825	1.19
- Reino Unido	1,004,169	18.89	5,660,463	25.89
- República Checa	23,565	0.44	98,077	0.45
- Suecia	114,552	2.15	539,529	2.47
- Resto de la UE*	119,135	2.24	380,388	1.74
Noruega	65,446	1.23	350,956	1.61
Rusia	67,762	1.27	282,633	1.29
Suiza	117,730	2.21	534,123	2.44
Resto de Europa	88,999	1.67	317,632	1.45
Japón	52,024	0.98	99,535	0.46
Estados Unidos	322,786	6.07	723,146	3.31
Resto de América	346,783	6.52	801,560	3.67
Países africanos	57,917	1.09	154,119	0.70
Resto del mundo	480,093	9.03	940,636	4.30

*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

October 2018

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	83.66	2.19	56.66	2.46
Andalucía	79.93	2.49	55.09	3.26
Aragón	59.49	9.26	29.54	7.52
Asturias, Principado de	56.25	-1.23	23.85	-3.16
Balears, Illes	80.43	3.11	51.94	-0.48
Canarias	97.84	-0.26	82.97	-2.58
Cantabria	63.38	3.53	35.06	7.78
Castilla y León	58.77	1.24	29.22	2.15
Castilla - La Mancha	55.83	2.25	23.91	4.57
Cataluña	92.70	-0.37	64.22	3.01
Comunitat Valenciana	68.95	-0.74	48.03	0.05
Extremadura	57.61	0.07	27.82	5.15
Galicia	56.97	2.22	26.44	2.21
Madrid, Comunidad de	103.87	9.26	85.75	13.35
Murcia, Región de	55.74	-2.11	31.69	-2.16
Navarra, Comunidad Foral de	64.92	1.69	38.77	5.68
País Vasco	91.29	8.66	66.88	11.44
Rioja, La	66.07	2.15	38.19	3.28
Ceuta	67.61	3.77	38.18	9.16
Melilla	68.40	4.78	47.98	-0.26

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	83.66	2.19	56.66	2.46
HOTELS: Gold stars				
Five	177.12	-0.42	127.65	-1.64
Four	90.28	2.58	68.29	1.80
Three	66.13	2.78	45.50	2.13
Two	55.90	1.63	30.77	6.10
One	56.72	1.10	26.36	4.56
GUESTHOUSES: Silver stars				
Three and two	53.47	6.97	23.96	10.83
One	44.30	-4.45	19.68	2.85

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

Hotel Price Index (HPI). 2008 Base

October 2018

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	109.77	1.43
Andalucía	107.57	1.27
Aragón	87.17	5.95
Asturias, Principado de	89.59	1.74
Balears, Illes	123.17	0.70
Canarias	124.23	0.58
Cantabria	99.58	3.44
Castilla y León	92.73	0.47
Castilla - La Mancha	89.85	2.76
Cataluña	106.55	-0.27
Comunitat Valenciana	106.50	-0.66
Extremadura	92.20	0.68
Galicia	97.19	0.67
Madrid, Comunidad de	100.28	7.85
Murcia, Región de	82.11	-0.60
Navarra, Comunidad Foral de	89.12	1.42
País Vasco	113.97	6.70
Rioja, La	94.12	0.62
Ceuta	87.18	7.90
Melilla	99.13	3.81

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	109.77	1.43
HOTELS: Gold stars		
Five	100.52	0.59
Fourth	110.53	2.23
Three	112.72	-0.44
Two	109.41	2.05
One	108.95	-0.04
HOSTALS: Silver stars		
Three and two	102.51	2.49
One	111.79	5.06