

24 April 2018

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

**Overnight stays in hotel establishments<sup>1</sup> increase 7.1% in March with respect to the same month in 2017**

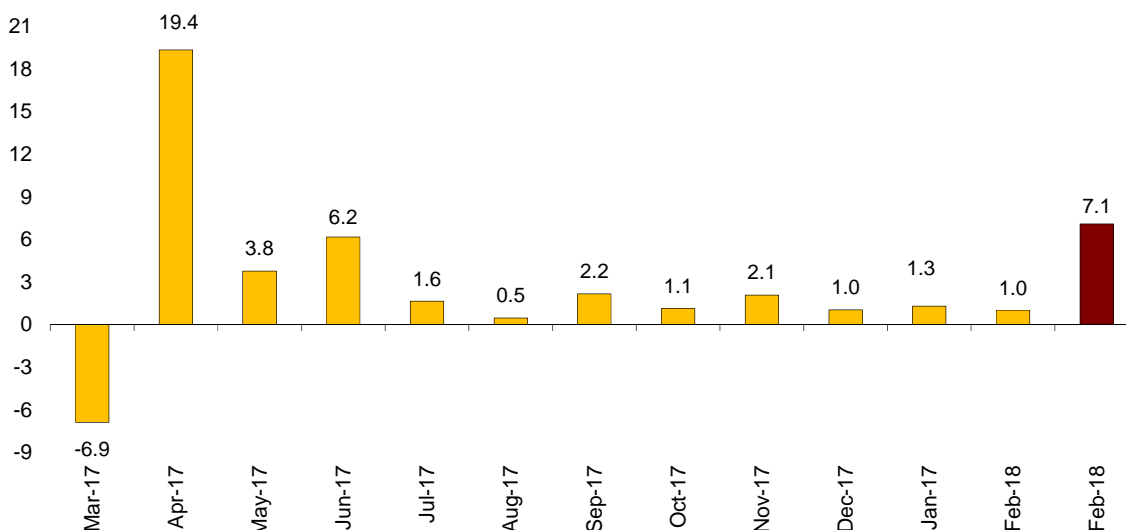
**Hotels invoice an average of 81.7 euros per occupied room, representing an annual increase of 5.2%**

During the month of March overnight stays in hotel establishments exceeded 21.9 million, 7.1% more than in the same month of 2017. Overnight stays by residents in Spain increased by 13.1% and those of non-residents did so by 3.3%.

The average stay decreased 1.4% as compared with March 2017, standing at 2.9 overnight stays per traveller.

During the first three months of 2018, overnight stays increased 3.5%, as compared with the same period of the previous year.

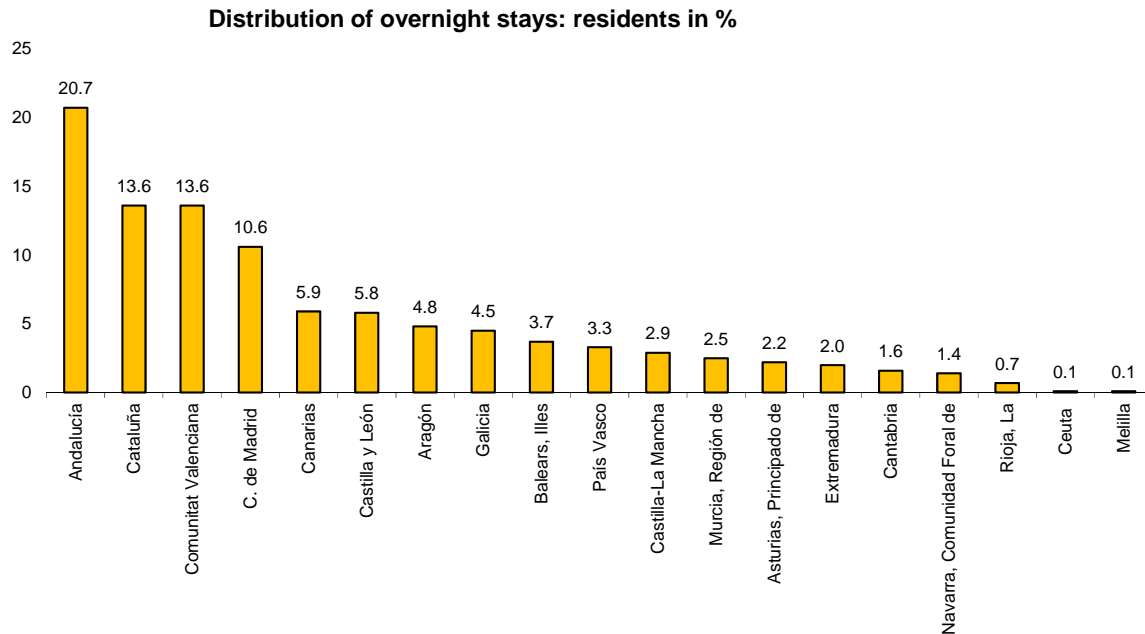
**Annual variation rates for overnight stays in %**



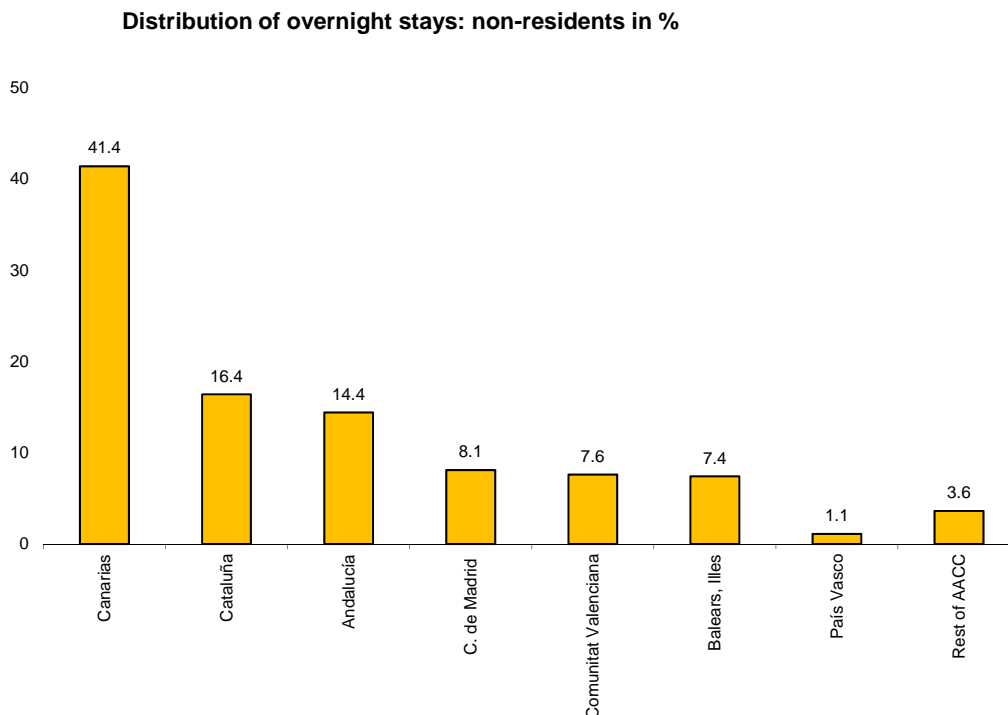
<sup>1</sup> Given that in 2018 Holy Week is celebrated between March and April, while in 2017 it was held in April, it is convenient to wait for the results of this survey next month to analyse both months together.

## Destinations

Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of residents in Spain in March, with annual variation rates in the number of overnight stays of 13.5%, 9.3%, 16.3% and 7.4%, respectively.



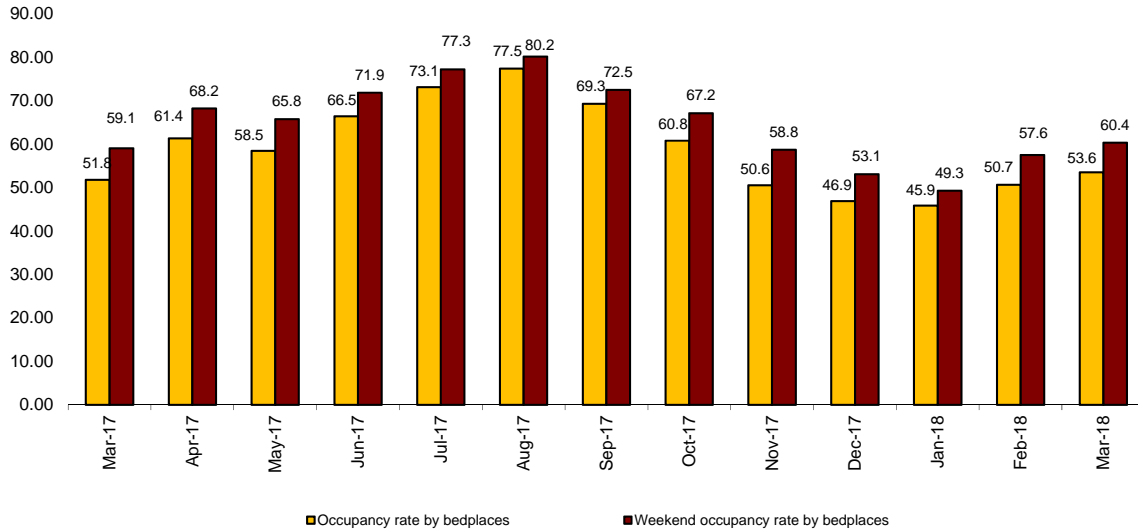
The main destination chosen by non-residents was Canarias, with 41.4% of total overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 0.4% as compared to March 2017. The following destinations for non-residents were Cataluña (with 16.4% of the total and a growth of 5.1% in overnight stays) and Andalucía (with 14.4% of total overnight stays and an annual increase of 7.4%).



### Hotel occupancy

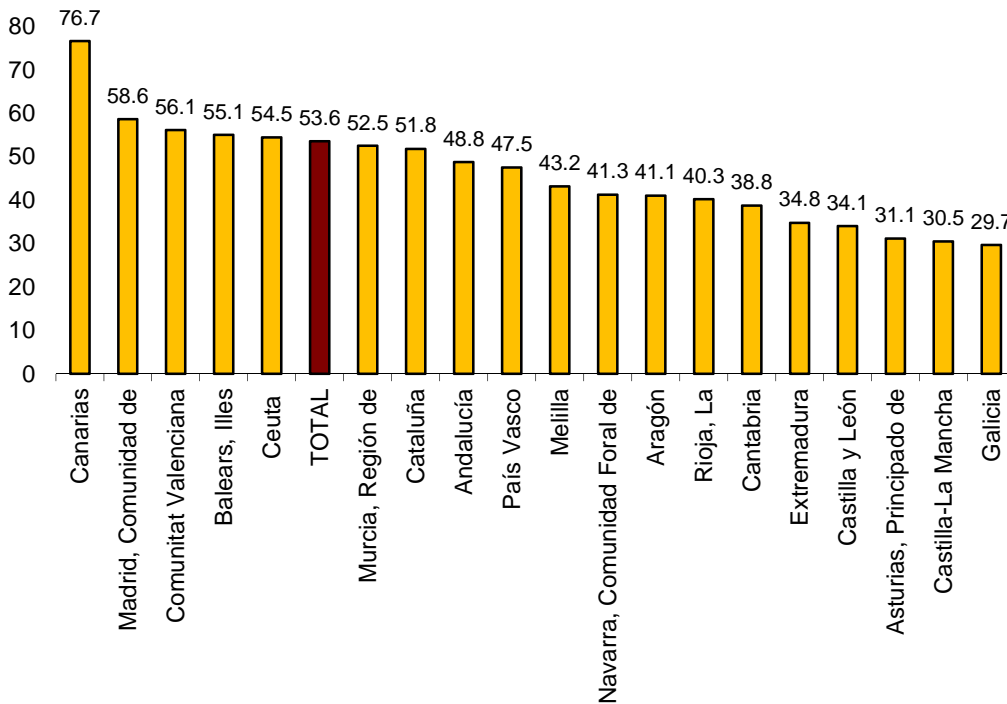
In March, 53.6% of the available bed-places were occupied, indicating an annual increase of 3.4%. The weekend occupancy rate by bed-places increased 2.2%, standing at 60.4%.

**Occupancy rate and weekend occupancy rate per bed-places**



Canarias registered the highest occupancy rate by bed-places in March (76.7%). It was followed by Comunidad de Madrid (58.6%) and Comunitat Valenciana (56.1%).

**Occupancy rate per bed-places by Autonomous Community**



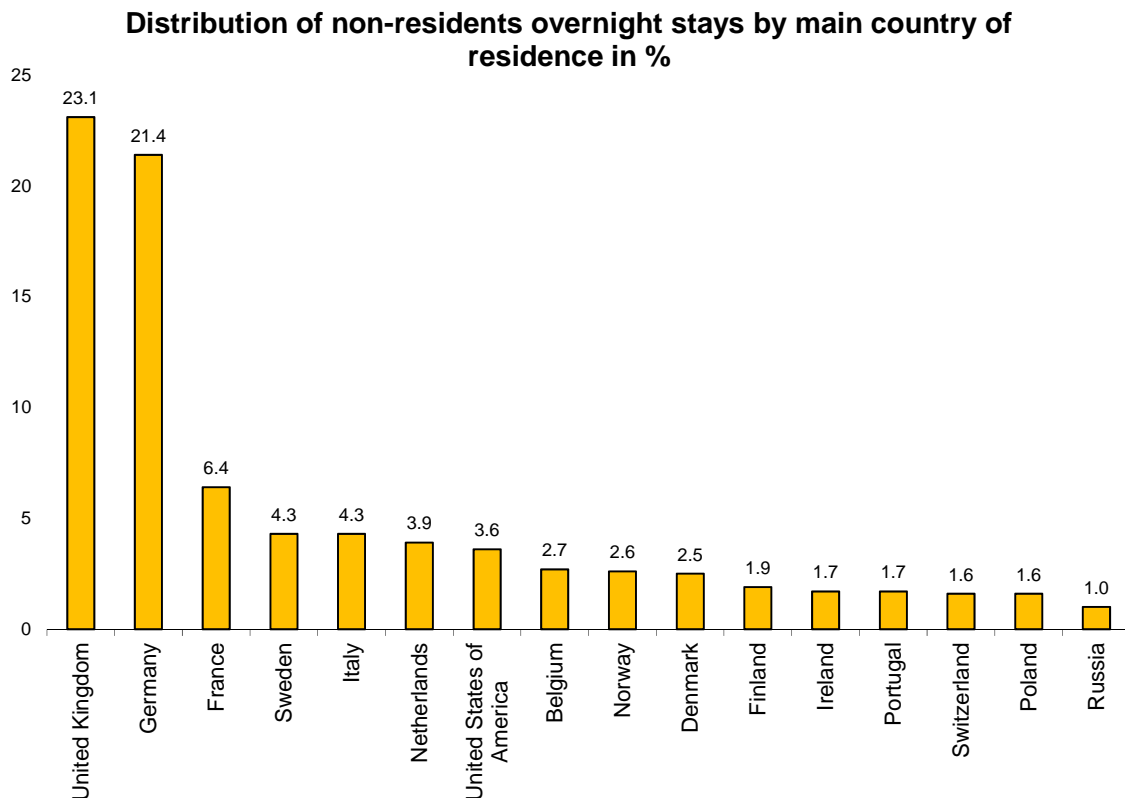
By tourist areas, the South of Gran Canaria recorded the highest occupancy rate by bed-places (79.6%) and the South of Tenerife the highest weekend occupancy rate (80.1%). The tourist area of the island of Tenerife registered the highest number of overnight stays, with more than 2.0 million.

The tourist places with more overnight stays were Barcelona, Madrid and San Bartolomé de Tirajana. Pájara presented both the greatest occupancy rate by bed-places (82.4%) and the greatest weekend occupancy rate (82.1%).

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

Travellers from the United Kingdom and Germany accounted for 23.1% and 21.4%, respectively, of total overnight stays of non-residents in hotel establishments in March. The British market decreased by 0.6% and the German increased by 2.9%.

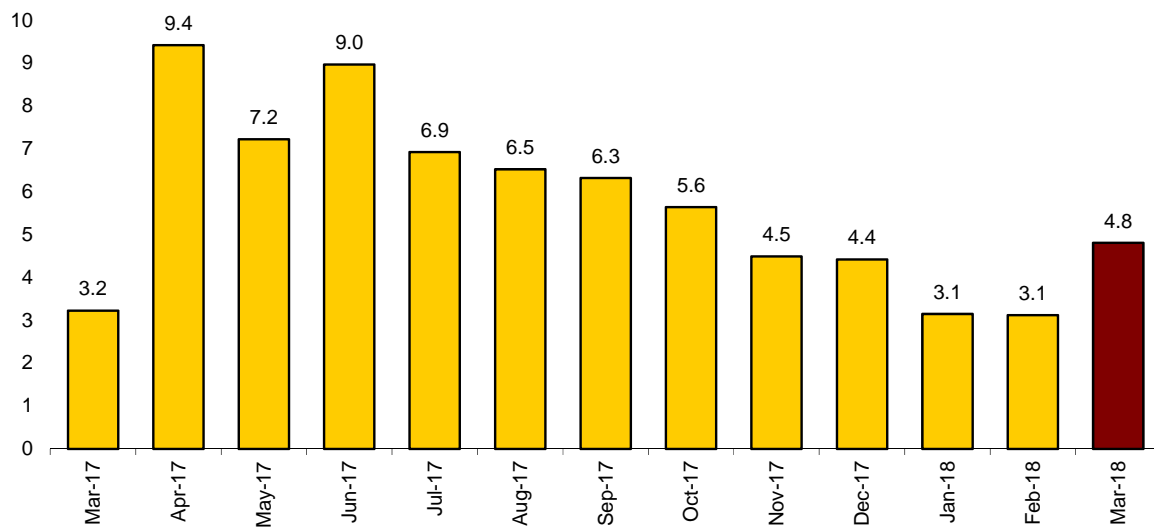
Overnight stays by travellers from France, Sweden and Italy (the following countries of origin) recorded annual rates of -1.0%, 1.3% and 2.2%, respectively.



## Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 4.8% in March, which is 1.7 points more than that registered last month and 1.6 points above that registered one year ago.

**Hotel Prices Index. Annual variation rate**



Canarias, Cataluña, Andalucía and Comunidad de Madrid were the Autonomous Communities with the greatest weighting in the HPI in March (accounting for 74.5% of the total weight). Hotel prices increased by 7.0% in the annual rate in Andalucía, 5.6% in Canarias and 5.2% in Comunidad de Madrid. In Cataluña hotel prices decreased by 1.2%.

By category, hotel prices increased in all of them. In one-silver-star hotels (8.3%), two-golden-star hotels (6.9%), four-golden-star hotels (5.5%), three-golden-star hotels (4.9%), one-golden-star hotels (3.6%), three and two-silver-star hotels (3.3%) and in five-golden-star hotels (1.5%).

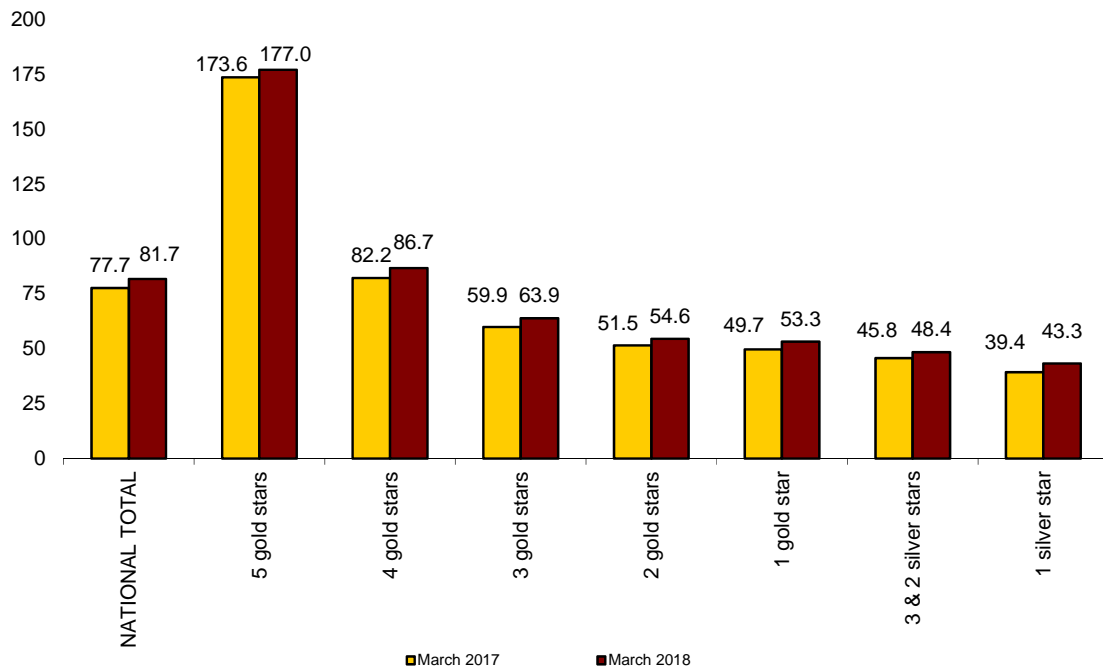
## Profitability of the Hotel Sector

The average daily rate of hotels per occupied room (ADR) was 81.7 euros in March, which means an increase of 5.2% compared to the same month of 2017.

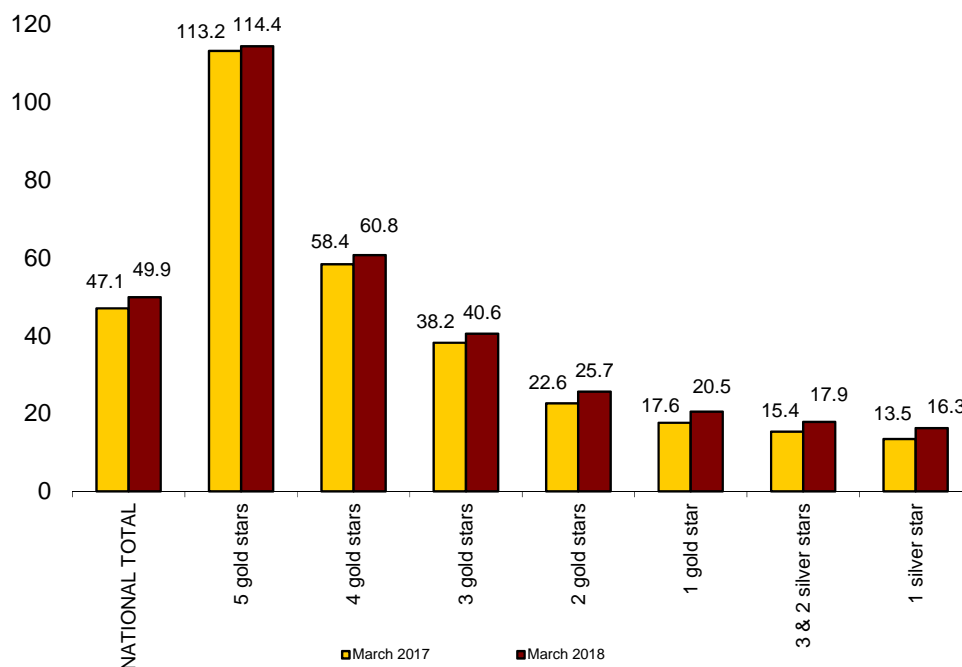
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 49.9 euros, with a 6.1% increase.

By category, the average rate was 177.0 euros for five-star hotels, 86.7 euros for four-star hotels and 63.9 euros for three-star hotels. Revenues per available room for these same categories were 114.4, 60.8 and 40.6 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)

March 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>7,521,175</b>	<b>4,127,149</b>	<b>3,394,027</b>	<b>21,965,769</b>	<b>8,981,160</b>	<b>12,984,609</b>	<b>2.92</b>
HOTELS: Golden stars							
Five	453,673	141,715	311,958	1,545,139	298,377	1,246,762	3.41
Four	3,649,991	1,845,258	1,804,732	11,575,132	4,154,022	7,421,109	3.17
Three	1,908,030	1,098,257	809,773	5,698,738	2,548,741	3,149,997	2.99
Two	580,924	401,010	179,914	1,226,076	753,508	472,568	2.11
One	227,987	155,616	72,372	452,219	280,216	172,003	1.98
INNS: Silver stars							
Two and three	387,457	280,245	107,213	768,010	523,890	244,120	1.98
One	313,113	205,049	108,064	700,455	422,405	278,050	2.24
Annual rate	8.67	11.36	5.57	7.10	13.13	3.30	-1.44
Cumulative annual rate	4.99	5.79	4.06	3.50	6.18	1.89	-1.43

### 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>13,753</b>	<b>630,260</b>	<b>1,303,333</b>	<b>53.56</b>	<b>60.36</b>	<b>61.20</b>	<b>179,888</b>
HOTELS: Golden stars							
Five	283	42,171	88,379	55.62	61.41	63.98	27,684
Four	2,093	285,568	610,511	60.18	66.85	70.25	91,306
Three	2,250	147,788	310,376	58.23	64.19	64.81	37,818
Two	1,769	49,698	96,689	40.54	50.32	47.07	8,626
One	1,089	23,110	45,262	31.98	40.71	37.38	3,600
INNS: Silver stars							
Two and three	2,868	42,569	80,155	30.75	39.52	36.19	5,810
One	3,401	39,355	71,960	31.29	36.57	37.85	5,044
Annual rate	0.53	2.15	2.95	3.44	2.18	0.89	4.97

### 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>									
Sur de Gran Canaria	21,604	177,670	93,046	1,398,774	79.56	79.86	87.76	7.49	11,761
Isla de Gran Canaria	40,916	202,043	138,362	1,491,618	78.18	78.83	86.78	6.71	12,831
Isla de Fuerteventura	12,993	139,766	47,747	1,105,405	77.66	77.57	87.15	7.55	8,274
Sur de Tenerife	28,134	204,233	120,921	1,488,864	77.08	80.08	84.49	6.93	14,789
Isla de La Gomera	2,135	6,624	4,485	38,414	76.46	77.83	83.56	4.90	422
Isla de Tenerife	68,252	254,801	263,367	1,801,811	76.05	79.10	83.16	6.39	18,340
Isla de Lanzarote	16,099	118,278	61,367	848,347	75.36	77.08	89.50	6.77	6,773
Isla de La Palma	4,613	13,406	12,963	94,045	69.40	70.63	87.76	5.94	706

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

Barcelona	143,844	545,425	264,391	1,420,534	63	68	74	2	14,458
Costa del Sol	146,812	203,463	398,312	934,354	56	59	67	4	10,719
Costa Blanca	181,495	144,566	612,212	677,352	62	70	67	4	8,356
Isla de Mallorca	72,281	174,125	270,223	941,326	56	58	65	5	10,907
Palma - Calvià	47,532	108,168	206,302	555,533	57	61	67	5	6,673
Costa Brava	111,509	110,170	242,201	302,789	44	58	49	2	4,172
Costa Barcelona	115,110	109,663	220,408	286,721	49	49	61	2	3,969
Costa de Almería	69,092	15,962	263,109	68,255	47	49	63	4	1,986

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

Pájara	5,770	81,476	22,869	675,014	82.35	82.10	86.10	8.00	4,869
Arona	6,896	60,291	35,191	465,956	80.93	81.92	88.09	7.46	3,481
San Bartolomé de Tirajana	17,260	127,490	72,826	1,015,304	80.45	80.79	87.41	7.52	9,170
Puerto de La Cruz	21,579	34,228	99,527	254,803	78.70	81.60	81.85	6.35	2,619
Mogán	4,293	50,634	18,909	385,726	77.40	77.62	89.19	7.37	2,599
Yaiza	6,559	53,295	29,597	387,715	76.50	75.69	87.83	6.97	3,488
Adeje	12,363	106,544	54,859	774,269	75.99	80.51	82.65	6.97	8,492
Tías	3,079	33,343	10,613	238,513	75.40	80.33	90.93	6.84	1,518
Teguise	3,527	29,105	14,937	209,611	74.29	76.64	91.89	6.88	1,627
Oliva (La)	3,920	27,850	13,535	218,858	70.01	74.46	91.22	7.31	1,954

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

Barcelona	132,989	522,566	245,635	1,368,631	64.11	68.86	73.83	2.46	13,849
Madrid	399,064	408,424	670,777	939,573	61.24	71.75	74.91	1.99	11,651
Benidorm	84,327	73,658	396,143	440,387	67.88	75.94	71.54	5.30	4,848
Sevilla	102,276	110,206	194,788	254,858	65.78	77.30	75.05	2.12	3,509
Palma de Mallorca	32,021	65,688	103,419	297,762	56.59	60.82	67.63	4.11	3,937
Torremolinos	37,955	39,750	133,173	257,906	66.93	64.58	72.12	5.03	2,211
Valencia	89,115	72,689	160,837	190,737	60.72	70.48	71.95	2.17	2,250
Calvià	15,716	37,918	102,369	223,820	57.19	59.63	67.19	6.08	2,478
Granada	81,001	73,480	145,905	135,043	60.82	73.05	66.13	1.82	1,702
Benalmádena	23,161	21,969	108,274	146,634	63.09	63.47	79.78	5.65	1,449

\*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>7,521,175</b>	<b>100.00</b>	<b>21,965,769</b>	<b>100.00</b>
Residentes en España	4,127,149	54.87	8,981,160	40.89
Residentes en el extranjero	3,394,027	45.13	12,984,609	59.11
TOTAL residentes en el extranjero	3,394,027	100.00	12,984,609	100.00
TOTAL residentes en U.E. (sin España)	2,322,502	68.43	10,222,297	78.73
- Alemania	489,431	14.42	2,775,894	21.38
- Austria	31,289	0.92	126,301	0.97
- Bélgica	82,328	2.43	353,484	2.72
- Dinamarca	58,869	1.73	328,222	2.53
- Finlandia	44,823	1.32	245,576	1.89
- Francia	306,400	9.03	828,749	6.38
- Grecia	8,825	0.26	23,079	0.18
- Irlanda	54,538	1.61	221,879	1.71
- Italia	193,433	5.70	552,516	4.26
- Luxemburgo	4,683	0.14	22,670	0.17
- Países Bajos	120,703	3.56	500,144	3.85
- Polonia	45,132	1.33	203,644	1.57
- Portugal	92,598	2.73	217,175	1.67
- Reino Unido	603,071	17.77	2,995,701	23.07
- República Checa	10,822	0.32	41,423	0.32
- Suecia	97,142	2.86	558,581	4.30
- Resto de la UE*	78,415	2.31	227,260	1.75
Noruega	52,469	1.55	336,816	2.59
Rusia	44,607	1.31	133,423	1.03
Suiza	59,175	1.74	203,852	1.57
Resto de Europa	76,583	2.26	245,542	1.89
Japón	49,416	1.46	96,897	0.75
Estados Unidos	201,444	5.94	463,861	3.57
Resto de América	222,163	6.55	536,562	4.13
Países africanos	47,757	1.41	115,102	0.89
Resto del mundo	317,909	9.37	630,256	4.85

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

## Hotel Price Index (HPI). 2008 Base

March 2018

Provisional data

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

	Index	Annual growth rate
<b>TOTAL</b>	<b>103.36</b>	<b>4.80</b>
Andalucía	99.13	6.99
Aragón	84.35	4.89
Asturias, Principado de	90.09	9.48
Balears, Illes	113.53	3.55
Canarias	129.62	5.60
Cantabria	92.14	10.58
Castilla y León	91.31	5.84
Castilla - La Mancha	90.31	5.66
Cataluña	90.68	-1.15
Comunitat Valenciana	105.12	10.00
Extremadura	93.50	7.46
Galicia	94.64	5.91
Madrid, Comunidad de	86.91	5.15
Murcia, Región de	83.49	6.20
Navarra, Comunidad Foral de	86.37	4.50
País Vasco	92.66	8.50
Rioja, La	88.21	6.83
Ceuta	87.14	3.40
Melilla	96.89	1.98

### National General Index and breakdown by categories

	Index	Annual growth rate
<b>TOTAL</b>	<b>103.36</b>	<b>4.80</b>
HOTELS: Gold stars		
Five	92.45	1.52
Fourth	105.06	5.51
Three	105.96	4.85
Two	97.73	6.90
One	103.59	3.64
HOSTALS: Silver stars		
Three and two	97.23	3.34
One	110.91	8.31

## Indicators on the Profitability of the Hotel Sector

March 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>81.73</b>	<b>5.23</b>	<b>49.94</b>	<b>6.12</b>
Andalucía	71.70	10.27	42.04	12.72
Aragón	62.97	5.67	27.81	7.40
Asturias, Principado de	60.29	13.67	21.34	27.32
Balears, Illes	73.12	7.41	45.56	1.97
Canarias	105.77	6.18	91.52	4.37
Cantabria	60.80	9.84	24.79	26.27
Castilla y León	58.74	9.88	22.53	14.17
Castilla - La Mancha	56.14	5.03	19.72	12.49
Cataluña	89.01	-1.29	53.46	-4.88
Comunitat Valenciana	64.68	11.00	39.45	14.00
Extremadura	61.63	9.17	24.07	26.76
Galicia	55.63	10.90	18.97	22.44
Madrid, Comunidad de	85.45	4.76	61.91	8.50
Murcia, Región de	55.74	4.73	33.73	13.46
Navarra, Comunidad Foral de	60.98	1.29	29.58	8.84
País Vasco	76.93	10.70	44.92	22.56
Rioja, La	65.40	9.79	30.81	8.18
Ceuta	69.50	2.05	37.28	-25.94
Melilla	66.47	0.50	41.80	7.79

### 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>81.73</b>	<b>5.23</b>	<b>49.94</b>	<b>6.12</b>
<b>HOTELS: Gold stars</b>				
Five	177.00	1.96	114.43	1.05
Four	86.69	5.44	60.78	4.05
Three	63.89	6.63	40.58	6.20
Two	54.55	5.98	25.67	13.55
One	53.25	7.14	20.53	16.58
<b>GUESTHOUSES: Silver stars</b>				
Three and two	48.42	5.78	17.86	16.11
One	43.28	9.94	16.26	20.93

(\*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room