

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

Overnight stays in hotel establishments register an increase of 0.5% in November, as compared with the same month of 2018

Hotels invoice an average of 83.2 euros per occupied room, representing an annual increase of 1.4%

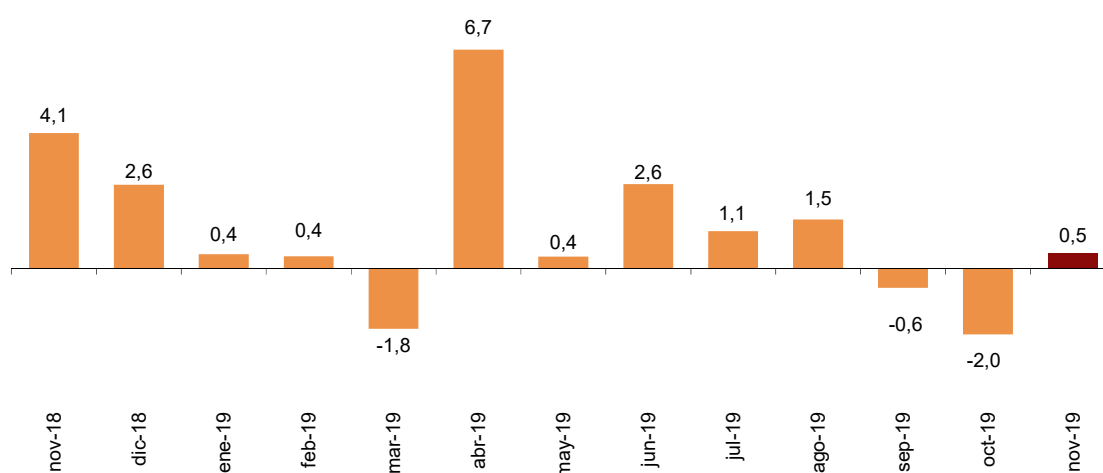
In November, overnight stays in hotel establishments exceeded 18.3 million, 0.5% more than in the same month in 2018. Overnight stays by residents in Spain increased by 0.7% and those of non-residents did so by 0.3%.

The average stay decreased by 2.7% compared with November 2018, to 2.7 overnight stays per traveller.

During the first 11 months of 2019, overnight stays increased 0.9%, as compared with the same period of the previous year.

Annual overnight stays variation rates

Percentage

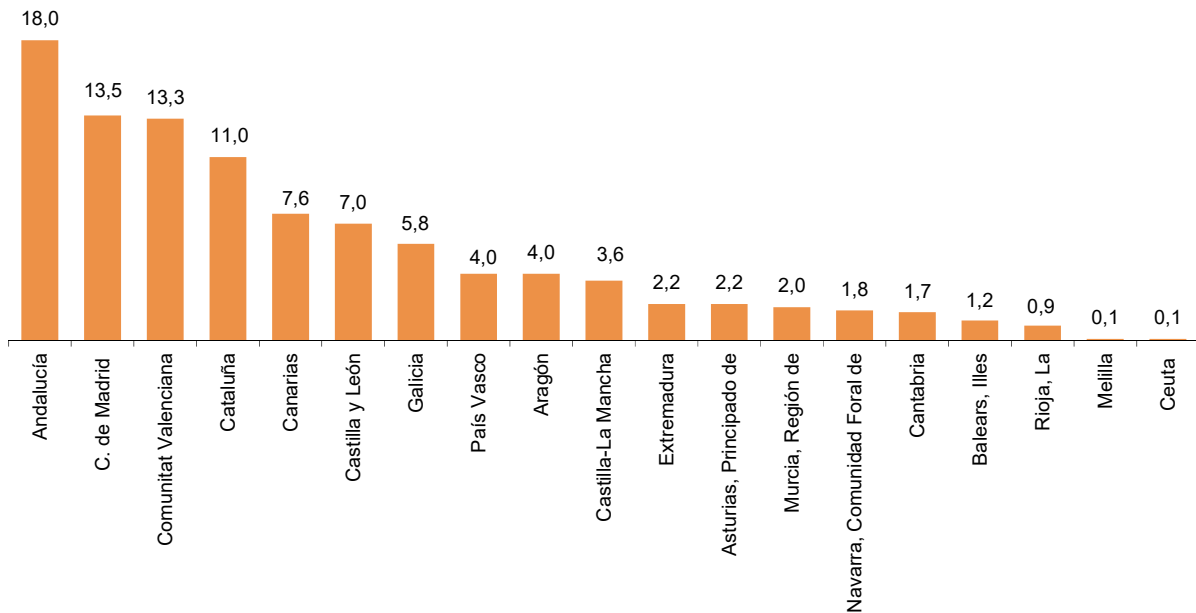


Destinations

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 -0.8%, -2.8% and 4.8% respectively.

Distribution of overnight stays: residents

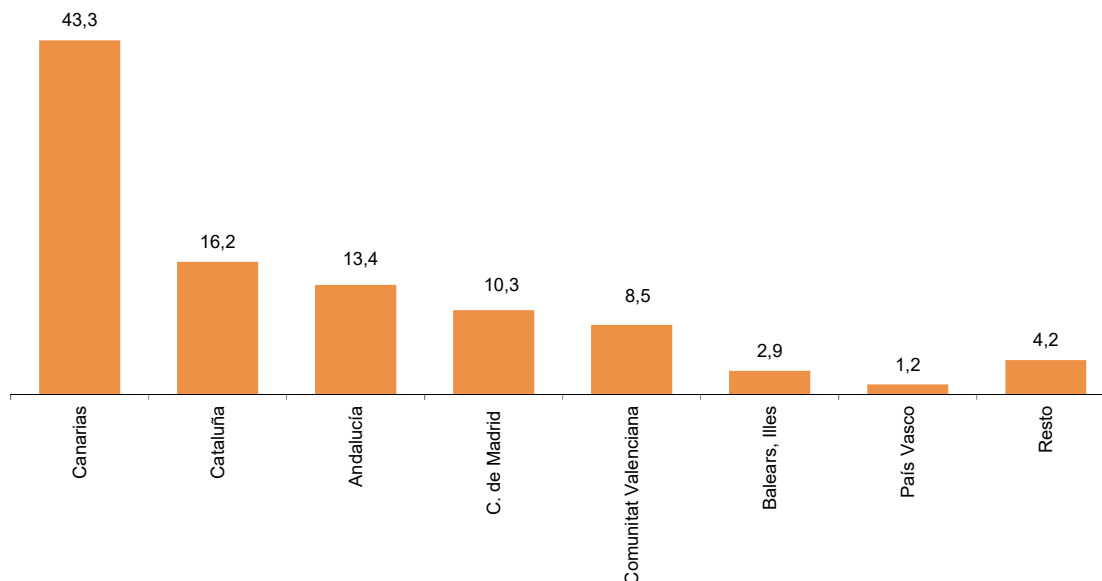
Percentage



The main destination chosen by non-residents was Canarias, with 43.3% of total overnight stays. In this Autonomous Community, overnight stays of foreign nationals decreased by 3.8% compared with November 2018. The next most popular destinations of non-residents were Cataluña (with 16.2% of the total overnight stays and an increase of 2.8%) and Andalucía (with 13.4% of the total and an increase of 3.1%).

Distribution of overnight stays: non-residents

Percentage

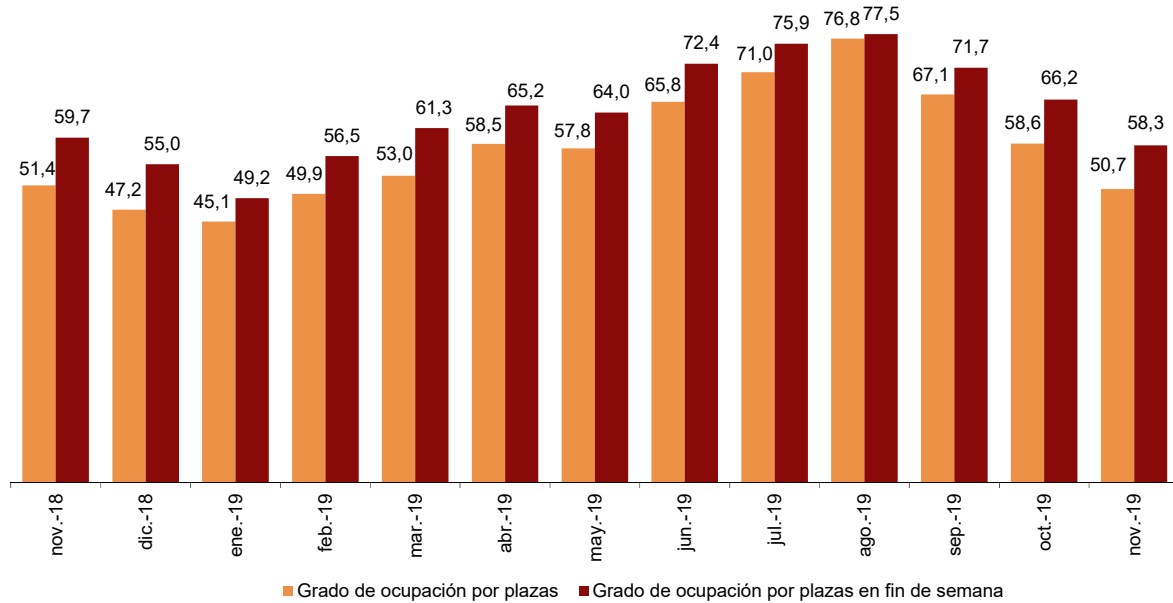


Hotel occupancy

In November, 50.7% of the available bed-places were covered, with an annual decrease of 1.3%. The weekend occupancy rate by bed-places decreased by 2.2%, standing at 58.3%.

Occupancy rate

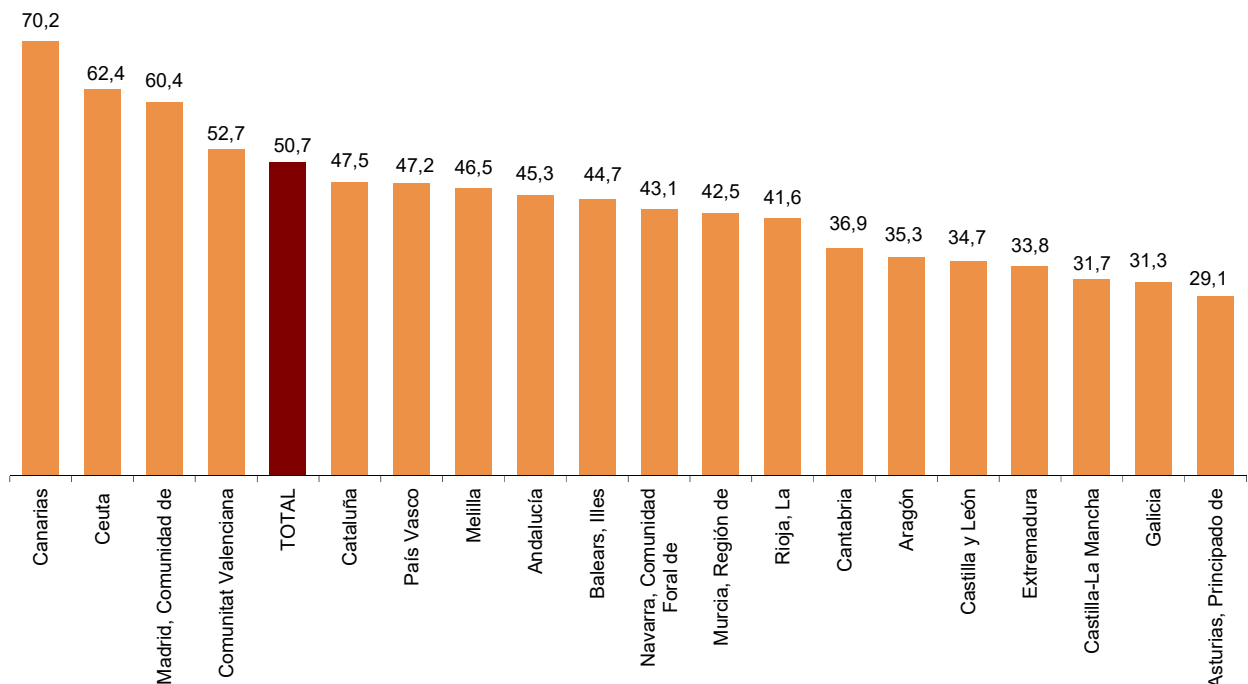
Percentage



Canarias showed the highest occupancy rate by bed-places in November (70.2%). It is followed by the Autonomous City of Ceuta (62.4%) and the Comunidad de Madrid (60.4%).

Level of occupancy by bed-places by Autonomous Community

Percentage



By tourist areas, the South of Gran Canaria reached the highest occupancy rate by bed-places (75.8%), and the highest weekend occupancy rate (76.0%). The island of Tenerife registered the highest number of overnight stays, with 2.0 million.

The tourist sites with the most overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Bartolomé de Tirajana reached the highest occupancy rate by bed-places (76.5%) and Arona the greatest weekend occupancy rate (78.2%).

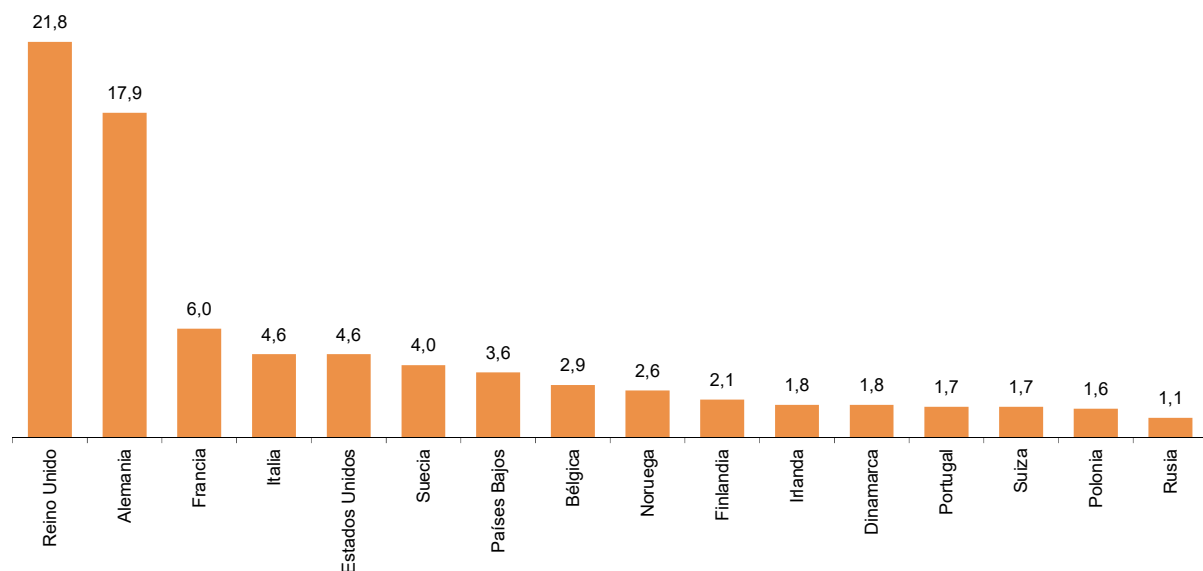
Overnight stays according to the country of origin of the travellers

In November, travellers from the United Kingdom and Germany represented 21.8% and 17.9% of total overnight stays of non-residents in hotel establishments, respectively. The British market shows an annual variation rate of -3.6% and the German market of -5.4%.

Overnight stays of travellers from France, Italy and the United States (the next greatest countries of origin) registered annual rates of 7.4%, 2.0% and 13.8% respectively.

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

Percentage

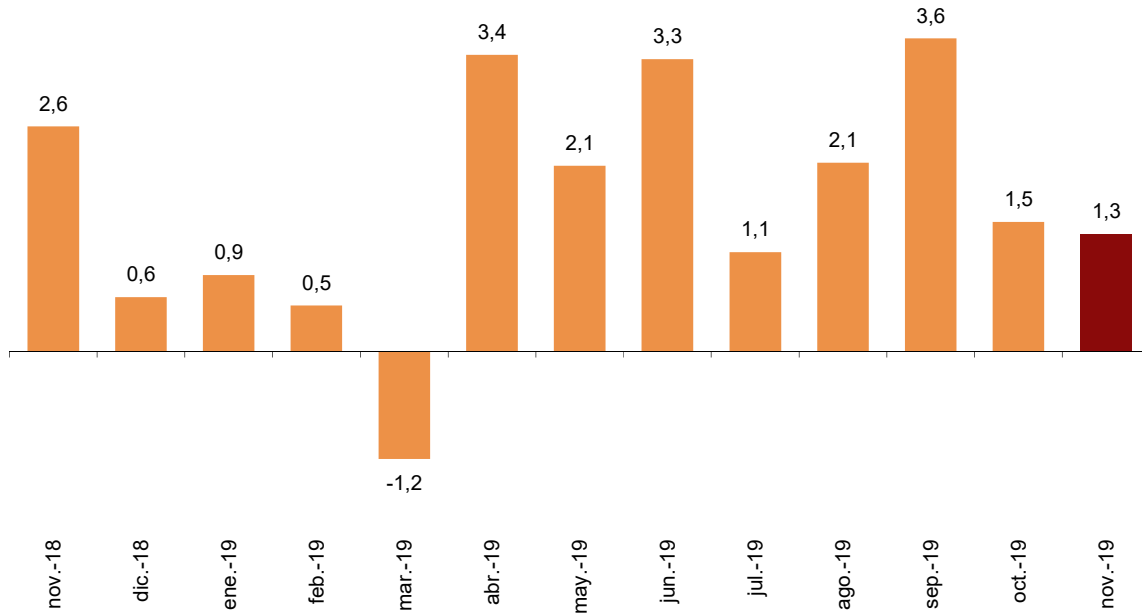


Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 1.3% in November, which is 0.2 points less than the previous month and 1.3 points below that registered a year ago.

Hotel Sector Price Index

Annual variation rate. Percentage



By Autonomous Community, the greatest increases in hotel prices were in Comunidad Foral de Navarra (6.6%).

By categories, the largest price increase took place in the three and two-silver star establishments (4.4%).

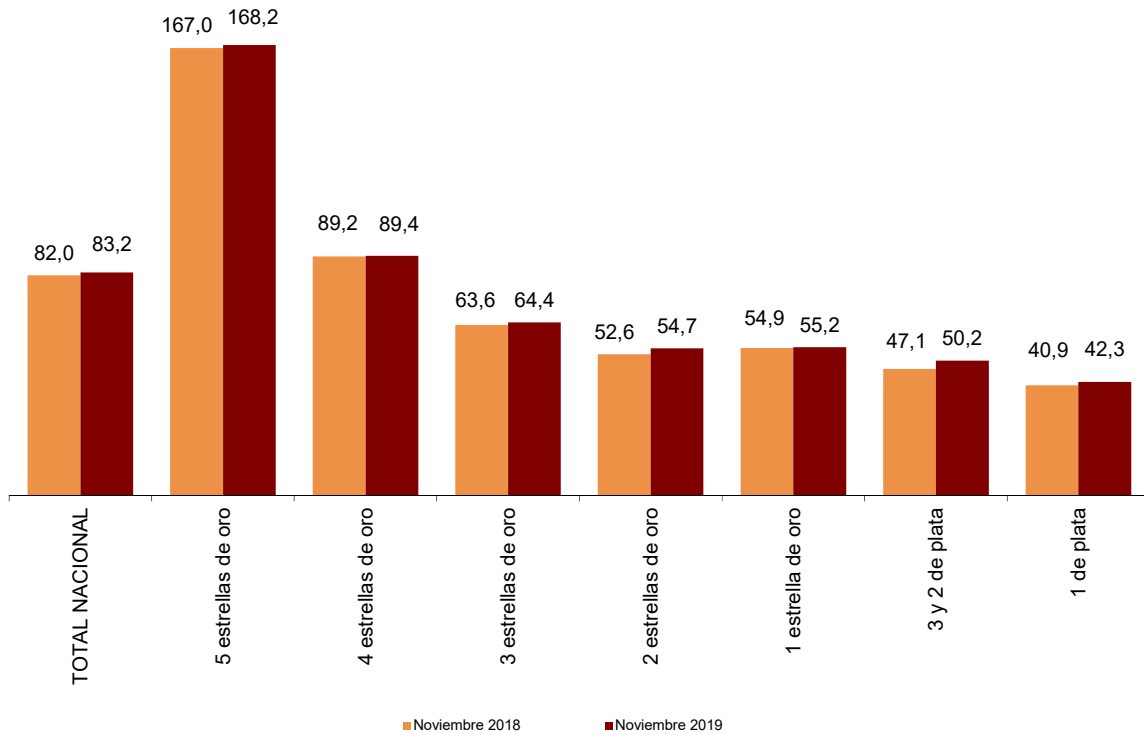
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 83.2 euros in November, representing an increase of 1.4% as compared with the same month of 2018.

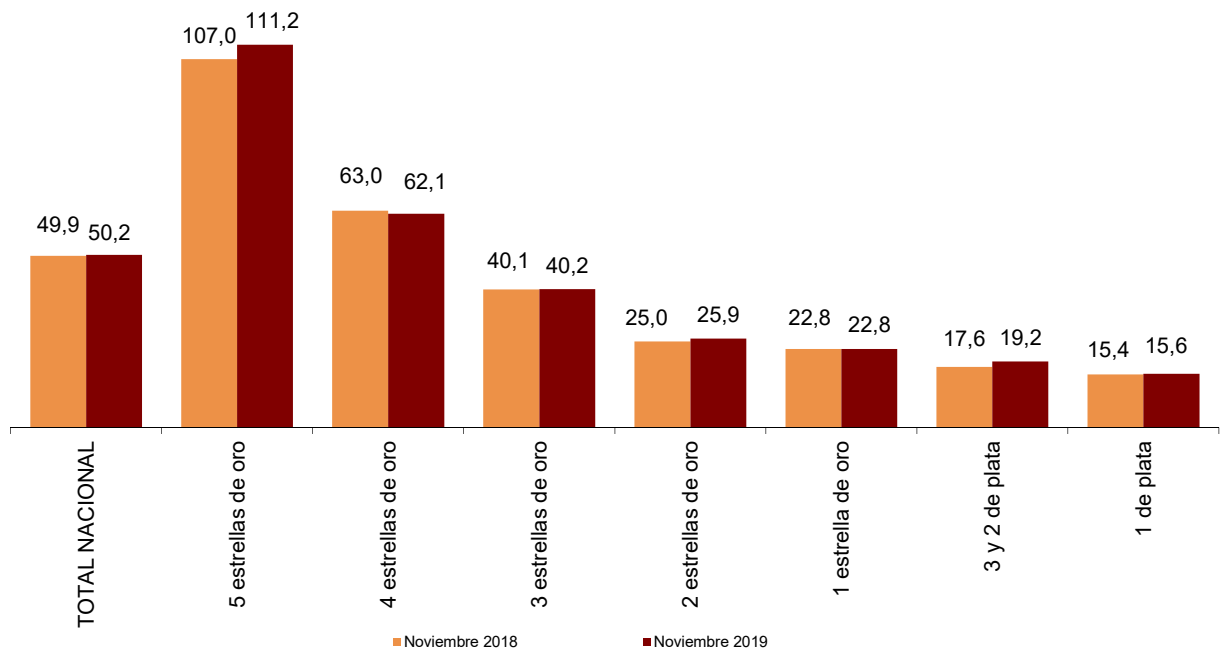
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 50.2 euros, with a 0.6% increase.

By category, the average rate was 168.2 euros for five-star hotels, 89.4 euros for four-star hotels and 64.4 euros for three-star hotels. Revenues per available room for these same categories were 111.2, 62.1 and 40.2 euros, respectively.

Average daily rate per occupied room by category
Euros



Average revenue per room available by categories
Euros



Revision and updating of data

Coinciding with today's publication, the INE has updated the data corresponding to the month of November 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.

Information reference period: seven consecutive days of each month, chosen at random so that all establishments aggregated cover the entire 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)

November 2019

Provisional Data

20th December 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	6,696,762	3,582,770	3,113,993	18,345,499	7,204,004	11,141,495	2.74
HOTELS: Golden stars							
Five	446,410	142,715	303,695	1,499,170	283,793	1,215,377	3.36
Four	3,293,234	1,628,852	1,664,382	9,502,010	3,229,234	6,272,777	2.89
Three	1,598,875	925,625	673,250	4,359,900	1,935,715	2,424,184	2.73
Two	506,734	331,061	175,673	1,089,331	606,301	483,030	2.15
One	196,259	129,093	67,166	430,338	248,802	181,536	2.19
INNS: Silver stars							
Two and three	353,571	240,485	113,086	746,062	480,799	265,262	2.11
One	301,679	184,939	116,740	718,688	419,360	299,328	2.38
Annual rate	3.25	0.88	6.12	0.46	0.68	0.32	-2.70
Cumulative annual rate	3.14	2.93	3.33	0.89	2.63	0.00	-2.18

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	13,294	579,907	1,196,165	50.73	58.33	61.20	169,731
HOTELS: Golden stars							
Five	282	42,853	90,560	54.86	60.71	66.74	28,482
Four	1,994	256,211	545,524	57.57	65.27	70.69	84,671
Three	2,037	127,317	267,099	53.92	60.89	64.48	32,898
Two	1,673	47,530	93,291	38.67	48.54	47.21	8,522
One	1,020	21,999	43,091	33.20	42.05	40.64	3,364
INNS: Silver stars							
Two and three	2,816	42,415	80,499	30.81	39.99	37.03	6,365
One	3,471	41,582	76,101	31.39	37.35	38.55	5,428
Annual rate	1.35	1.43	1.80	-1.28	-2.22	-0.53	2.86

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									
Sur De Gran Canaria	16,910	162,689	72,133	1,280,627	75.75	76.03	87.13	7.53	11,096
Gran Canaria	38,895	180,664	125,546	1,354,989	74.24	75.33	86.09	6.74	12,208
Sur De Tenerife	26,570	200,209	119,266	1,482,772	73.11	75.40	85.00	7.06	15,927
Tenerife	71,985	245,842	279,799	1,775,456	72.56	74.77	83.72	6.47	19,701
La Gomera	1,553	5,448	3,220	34,520	70.00	72.32	78.32	5.39	436
Lanzarote	17,919	85,147	81,626	682,897	67.49	67.05	82.01	7.42	6,800
Fuerteventura	10,896	106,787	44,114	899,940	63.37	62.22	76.71	8.02	8,089
La Palma	3,810	9,900	12,542	79,887	62.37	58.86	82.33	6.74	674

Tourist area with a greater number of overnight stays per month¹

Barcelona	147,785	545,870	253,759	1,373,049	61.22	65.12	74.94	2.35	15,315
Costa Blanca (Alicante)	164,724	134,077	519,412	643,334	58.70	63.93	67.28	3.89	8,782
Costa del Sol (Málaga)	116,486	169,670	252,694	683,014	50.80	55.27	63.23	3.27	9,662
Costa Barcelona 2016	86,507	110,061	167,678	208,595	44.24	46.70	58.99	1.91	3,394
Mallorca	34,870	77,628	63,452	303,836	46.39	53.62	57.72	3.26	4,909
Costa Brava	70,968	73,385	134,739	159,187	33.62	46.72	39.88	2.04	3,129
Palma - Calvãa	28,073	62,419	49,456	213,209	44.18	51.29	56.10	2.90	3,738
Costa de la Luz de Cádiz	58,756	36,645	119,596	93,825	35.20	43.77	44.06	2.24	2,328

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

San Bartolomé De Tirajana	13,332	115,409	57,916	912,241	76.48	75.79	86.73	7.54	8,596
Arona	5,574	62,713	25,782	466,108	76.30	78.21	88.42	7.20	3,460
Puerto De La Cruz	22,342	30,186	112,163	238,662	75.41	75.68	81.42	6.68	2,754
Mogán	3,580	47,104	13,883	368,639	74.07	76.93	88.62	7.55	2,531
Adeje	11,473	100,316	49,818	780,893	73.74	76.09	84.55	7.43	9,196
Benalmádena	11,968	18,103	36,079	115,055	72.76	67.37	74.56	5.03	941
Yaiza	5,306	39,108	31,359	308,197	69.20	69.84	82.41	7.65	3,409
Pájara	5,364	64,197	24,006	569,247	67.95	66.59	79.06	8.53	4,853
Teguise	5,281	20,777	27,188	164,709	67.67	65.69	83.44	7.36	1,582
Benidorm	78,365	78,116	339,416	478,805	65.99	68.70	72.42	5.23	5,564

Tourist site with a greater number of overnight stays per month¹

Madrid	391,494	431,853	680,858	1,034,704	63.59	72.62	80.53	2.08	12,570
Barcelona	136,368	526,140	234,772	1,328,805	62.56	66.59	75.77	2.36	14,733
Sevilla	100,615	110,341	182,340	263,525	62.74	71.75	78.95	2.11	3,773
Valencia	74,250	82,964	121,761	204,502	57.91	73.92	72.57	2.08	2,405
Granada	72,909	76,893	134,271	126,874	57.07	75.44	65.64	1.74	1,675
Palma De Mallorca	26,490	53,670	49,111	179,492	47.05	53.83	57.03	2.85	3,166
Tías	3,871	23,044	15,061	197,471	64.25	62.51	80.16	7.90	1,626
Oliva, La	2,051	25,799	9,631	194,345	63.50	62.73	81.35	7.32	1,909
Málaga	47,425	59,668	81,385	121,800	58.22	65.23	76.61	1.90	1,625
Torremolinos	15,349	28,580	36,526	158,023	57.04	57.86	64.98	4.43	1,596

¹Sin 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	6,696,762	100.00	18,345,499	100.00
Residentes en España	3,582,770	53.50	7,204,004	39.27
Residentes en el extranjero	3,113,993	46.50	11,141,495	60.73
TOTAL residentes en el extranjero	3,113,993	100.00	11,141,495	100.00
TOTAL residentes en U.E. (sin España)	1,916,825	61.56	8,204,802	73.64
- Alemania	337,359	10.83	1,991,692	17.88
- Austria	24,791	0.80	107,270	0.96
- Bélgica	69,645	2.24	318,237	2.86
- Dinamarca	38,124	1.22	195,377	1.75
- Finlandia	40,444	1.30	238,953	2.14
- Francia	271,137	8.71	667,376	5.99
- Grecia	12,617	0.41	34,911	0.31
- Irlanda	44,731	1.44	198,429	1.78
- Italia	186,919	6.00	514,689	4.62
- Luxemburgo	3,973	0.13	19,343	0.17
- Países Bajos	105,008	3.37	396,710	3.56
- Polonia	43,950	1.41	174,334	1.56
- Portugal	89,375	2.87	192,998	1.73
- Reino Unido	476,924	15.32	2,427,622	21.79
- República Checa	16,647	0.53	56,875	0.51
- Suecia	76,898	2.47	440,258	3.95
- Resto de la UE ¹	78,285	2.51	229,728	2.06
Noruega	44,285	1.42	288,888	2.59
Rusia	42,094	1.35	124,688	1.12
Suiza	51,323	1.65	187,010	1.68
Resto de Europa	79,341	2.55	220,312	1.98
Japón	51,360	1.65	96,995	0.87
Estados Unidos	215,606	6.92	510,037	4.58
Resto de América	255,055	8.19	624,755	5.61
Países africanos	59,582	1.91	138,990	1.25
Resto del mundo	398,522	12.80	745,019	6.69

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 November 2019

Provisional data

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

	Index	Annual growth rate
TOTAL	108.62	1.33
Andalucía	104.76	0.52
Aragón	87.80	2.26
Asturias, Principado de	87.65	-3.06
Balears, Illes	111.76	-2.34
Canarias	130.55	1.40
Cantabria	94.11	5.83
Castilla y León	93.69	0.16
Castilla - La Mancha	94.30	1.32
Cataluña	98.73	1.64
Comunitat Valenciana	107.92	1.38
Extremadura	94.67	-0.26
Galicia	95.50	1.33
Madrid, Comunidad de	95.37	2.50
Murcia, Región de	85.28	-0.05
Navarra, Comunidad Foral de	89.90	6.60
País Vasco	106.51	0.42
Rioja, La	92.55	0.89
Ceuta	92.40	-1.18
Melilla	101.34	5.38

2. National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	108.62	1.33
HOTELS: Gold stars		
Five	99.21	2.15
Fourth	111.30	0.69
Three	109.00	2.15
Two	103.52	1.88
One	110.27	2.06
HOSTALS: Silver stars		
Three and two	103.80	4.36
One	112.94	0.10

Indicators on the Profitability of the Hotel Sector

November 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	83.17	1.40	50.20	0.62
Andalucía	69.87	1.74	38.13	2.06
Aragón	54.12	1.36	23.61	3.51
Asturias, Principado de	50.57	-7.65	18.02	-3.65
Balears, Illes	80.08	-3.02	44.83	-0.07
Canarias	102.43	0.98	84.30	-1.96
Cantabria	60.85	3.66	25.09	12.75
Castilla y León	57.08	0.86	23.41	1.18
Castilla - La Mancha	54.64	1.16	20.93	4.05
Cataluña	96.39	1.34	56.96	-0.03
Comunitat Valenciana	63.09	-0.43	38.27	1.16
Extremadura	55.82	-1.31	23.24	1.72
Galicia	54.33	2.67	20.04	1.54
Madrid, Comunidad de	94.82	4.41	72.34	2.63
Murcia, Región de	56.32	4.36	29.03	-3.41
Navarra, Comunidad Foral de	64.29	3.62	32.98	0.70
País Vasco	81.46	2.29	48.77	-1.62
Rioja, La	65.44	4.01	31.40	-3.22
Ceuta	68.19	-3.06	42.60	-13.32
Melilla	73.37	11.17	48.08	8.59

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	83.17	1.40	50.20	0.62
HOTELS: Gold stars				
Five	168.19	0.71	111.23	3.96
Four	89.36	0.22	62.10	-1.45
Three	64.43	1.34	40.18	0.26
Two	54.73	3.97	25.89	3.63
One	55.24	0.54	22.84	0.19
GUESTHOUSES: Silver stars				
Three and two	50.15	6.60	19.22	9.46
One	42.26	3.22	15.57	1.01

¹ ADR: Average Daily Rate
RevPAR: Revenue per Available Room