

22 December 2023

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS) November 2023. Provisional data

Overnight stays in hotel establishments increase 7.9% in November compared to the same month in 2022

Hotels invoice an average of 104.9 euros per occupied room, 9.9% more than the same month of the previous year

During the month of November, overnight stays in hotel establishments exceeded 19.0 million. This represents an increase of 7.9% compared to the same month in 2022, when there were 17.7 million. Moreover, they are more than those of the same month in 2019.

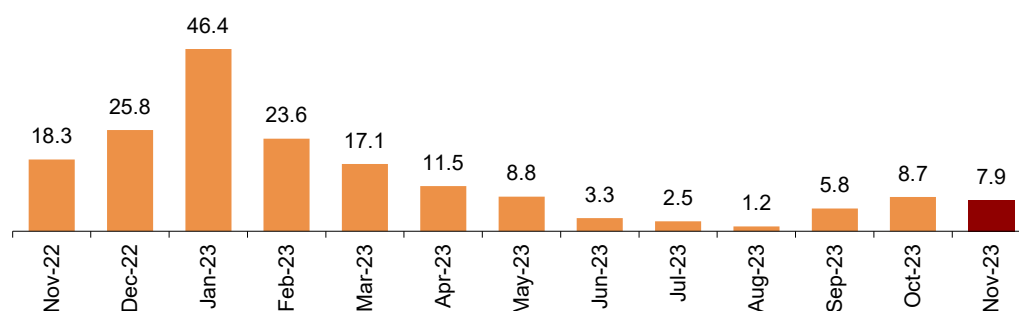
Based on place of origin, overnight stays by travellers resident in Spain exceeded 6.9 million, which represents 36.3% of the total. In turn, overnight stays by non-residents stood at over 12.1 million.

On the other hand, the average stay decreased 0.4% compared to November 2022, standing at 2.8 overnight stays per traveller.

During the first 11 months of 2023, overnight stays increased by 8.4% compared to the same period of the previous year. Moreover, they surpass those of the first 11 months of 2019.

Annual variation rate for overnight stays

Percentage

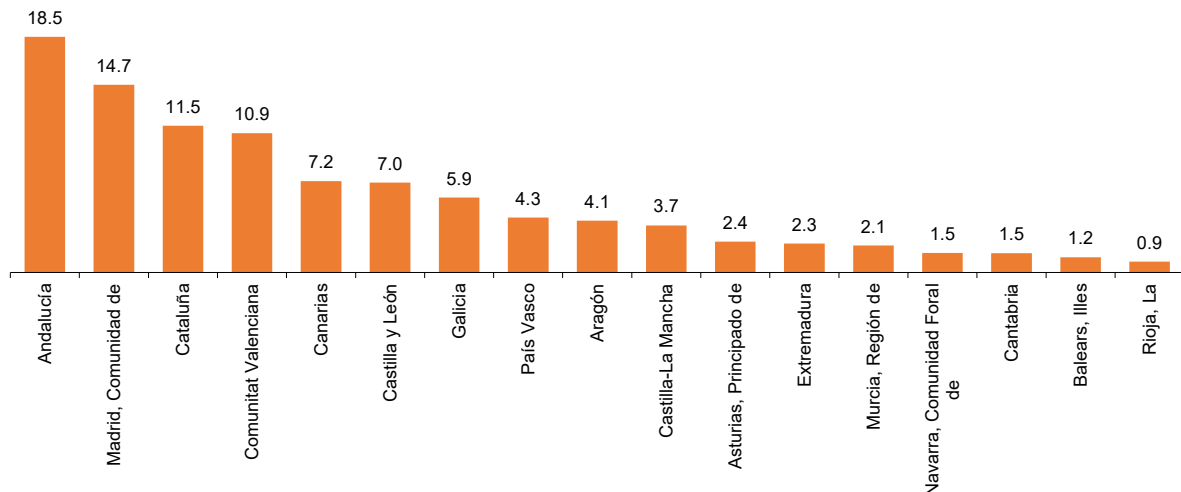


Destination

In November, Andalucía, Comunidad de Madrid and Cataluña were the main destinations for travellers who are residents in Spain, with 18.5%, 14.7% and 11.5% of total overnight stays, respectively.

Distribution of overnight stays: residents

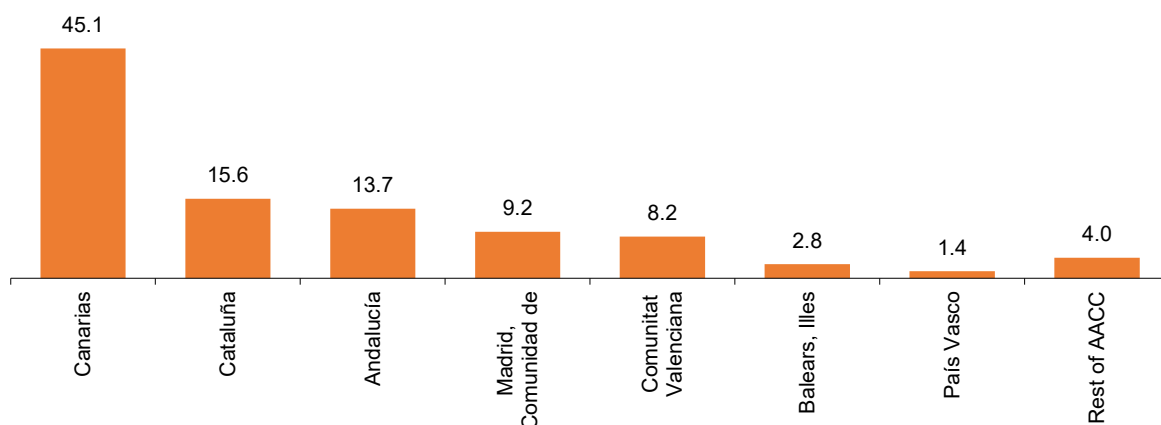
Percentage



The main destination chosen by non-residents was Canarias, with 45.1% of the total number of overnight stays. Following that, the main destinations were Cataluña and Andalucía, with 15.6% and 13.7% of the total, respectively.

Distribution of overnight stays: non-residents

Percentage

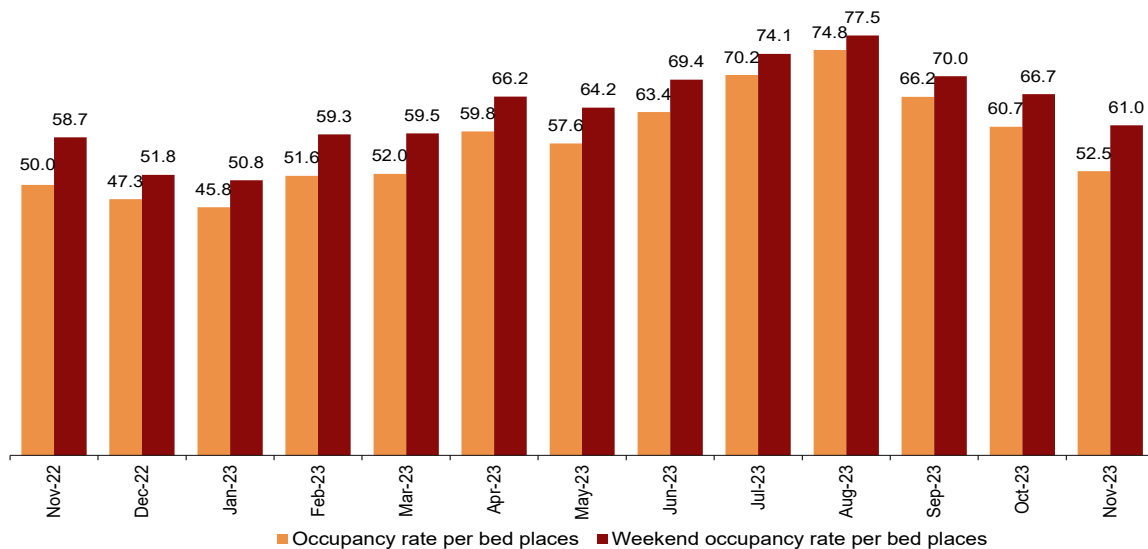


Hotel occupancy

In November, 52.5% of the available bed places were occupied, with an annual increase of 5.1%. The weekend occupancy rate by bed places increased by 3.8% to 61.0%.

Occupancy rate

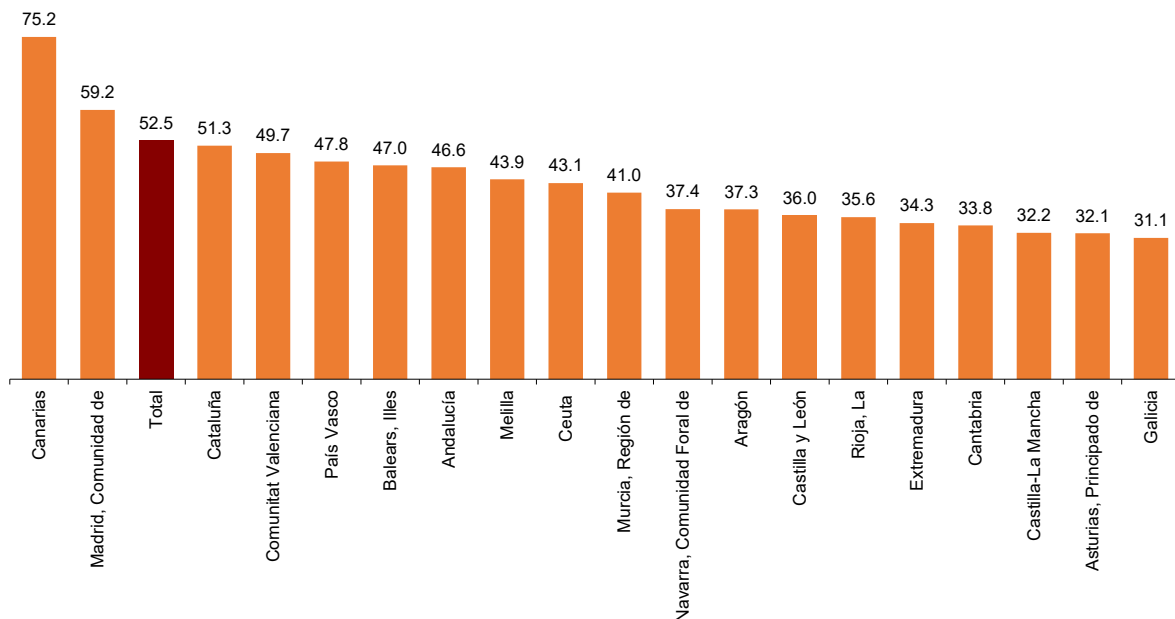
Percentage



Canarias showed the highest occupancy rate by bed places during November (75.2%). It was followed by Comunidad de Madrid, with 59.2%.

Occupancy rate per bed-places by autonomous community

Percentage



By tourist areas, Sur de Tenerife registered the highest occupancy rate by bed places (78.7%). La Isla de Tenerife registered the highest weekend occupancy rate (80.3%) and the largest number of overnight stays in November, with 2,226,163.

The tourist sites with the most overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Adeje had the highest occupancy rate by bed places (81.1%), while Puerto de la Cruz had the greatest weekend occupancy rate (83.5%).

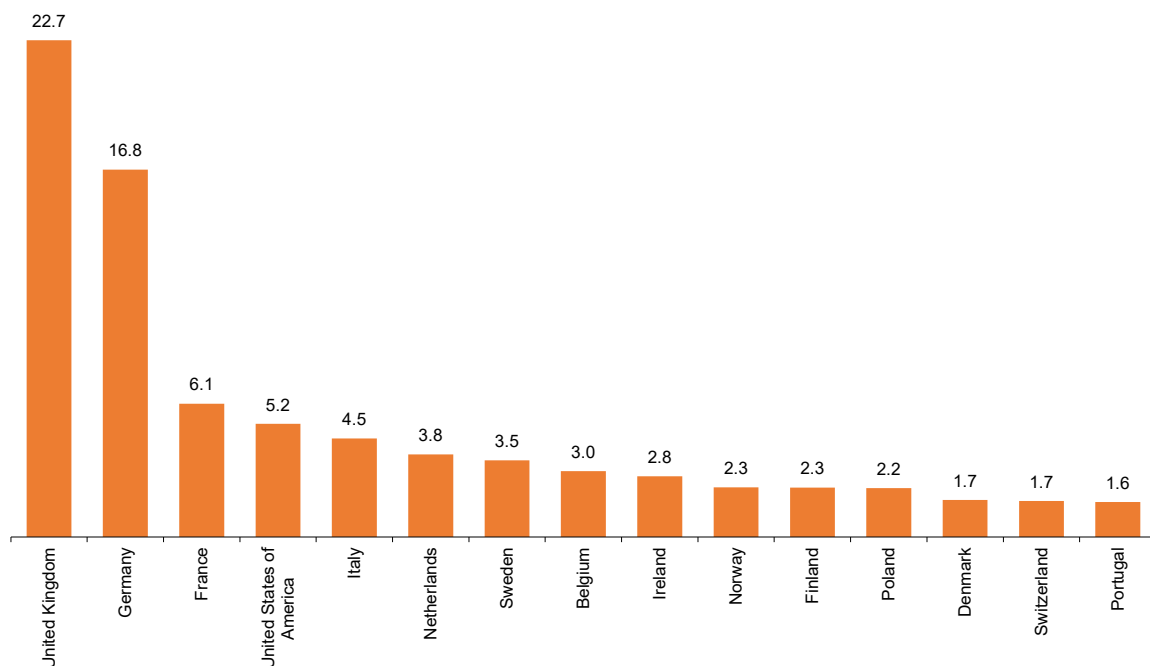
Overnight stays according to the country of origin of travellers

Travellers from the United Kingdom and Germany accounted for 22.7% and 16.8%, respectively, of total overnight stays by non-residents in hotel establishments in November.

Overnight stays by travellers from France, the United States and Italy (the following source markets) accounted for 6.1%, 5.2% and 4.5% of the total, respectively.

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

Percentage

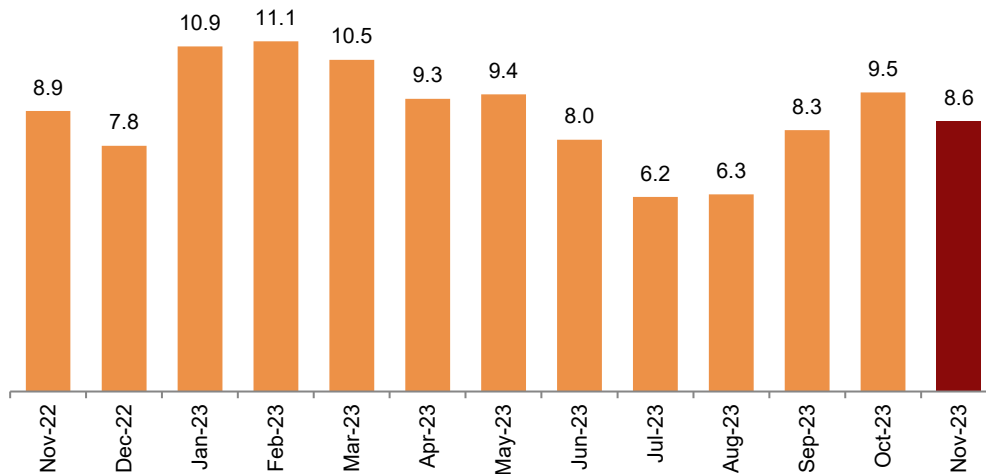


Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 8.6% in November, which was 0.3 points below that recorded in the same month in 2022 and 0.9 points less than that recorded last month.

Hotel Prices Index

Annual variation rate. Percentage



By Autonomous Community, the greatest increase of hotel prices compared to November 2022 was in Comunitat Valenciana (11.4%). And the smallest was recorded in Extremadura, with a rate of 1.0%.

By categories, the greatest price increase occurred in the three-star gold establishments (11.8%).

Hotel Sector Profitability

The average daily hotel turnover per occupied room (ADR) was 104.9 euros in November, an increase of 9.9% compared to the same month in 2022.

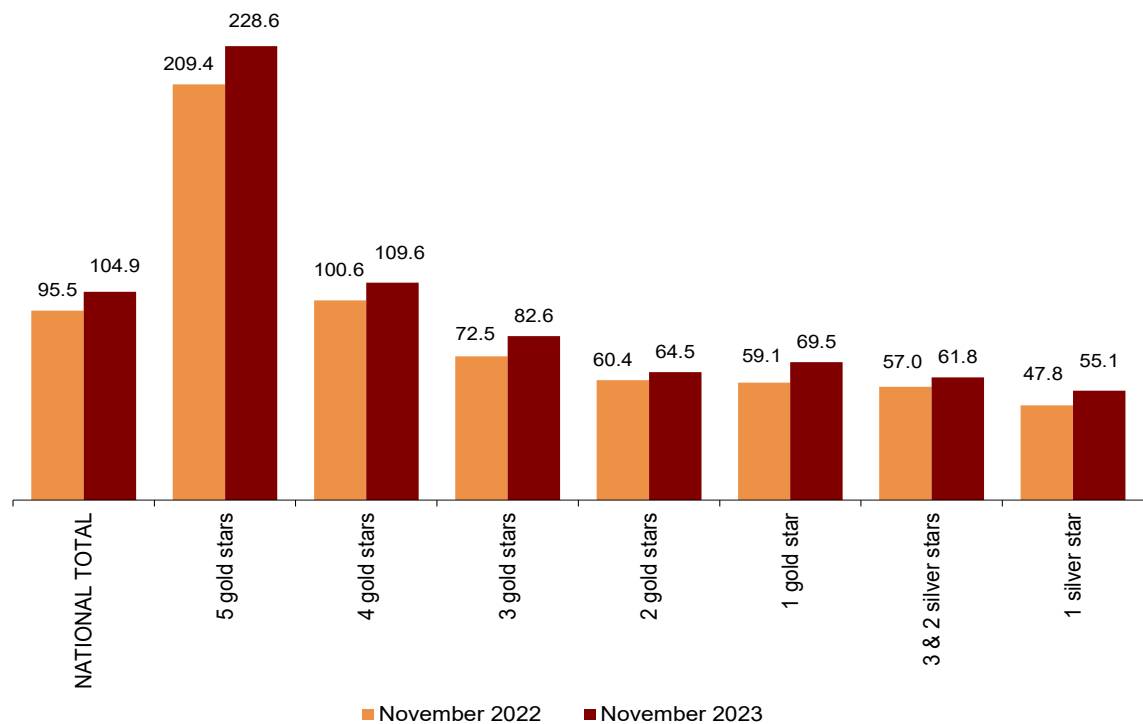
On the other hand, the average daily revenue per available room (RevPAR), which is determined by the occupancy rate registered in hotel establishments, reached 67.1 euros, increasing by 15.1%.

By category, the average rate was 228.6 euros for five-star hotels, 109.6 euros for four-star hotels and 82.6 euros for three-star hotels. Revenue per available room for these same categories was 151.5, 80.2 and 54.2 euros, respectively.

The tourist spot with the highest ADR is Marbella, with an average daily rate per occupied room of 173.9 euros. Adeje has the highest RevPar, with a revenue per available room of 152.8 euros.

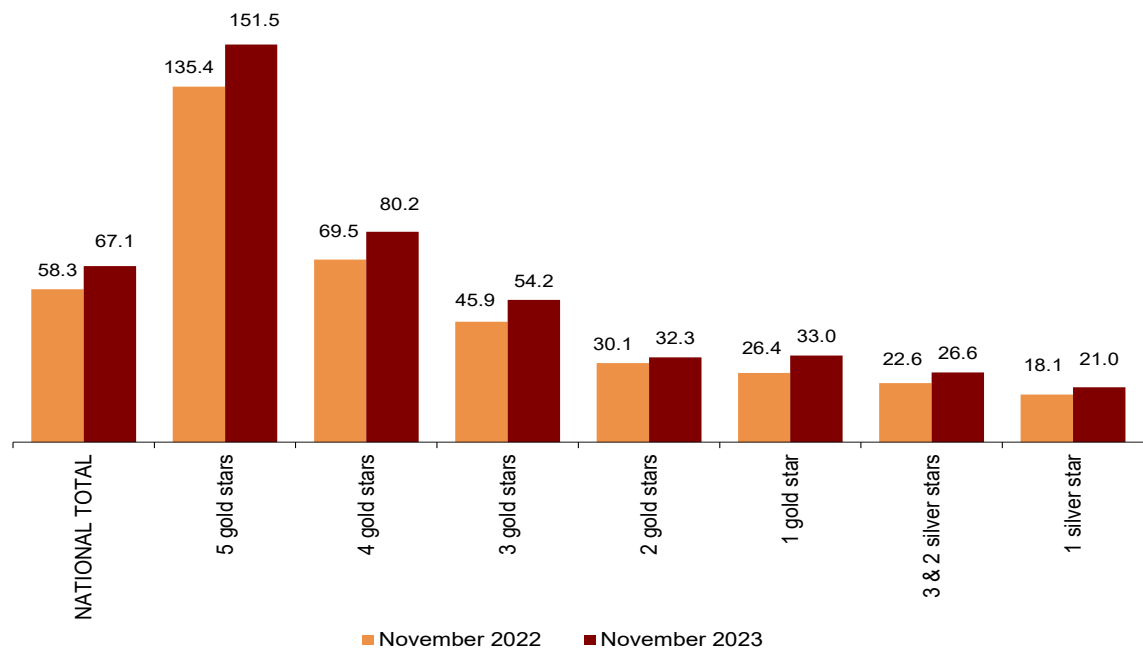
Average daily rate by hotel

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 November 2022 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, from the viewpoint of both supply and demand, thus meeting the needs of national institutions and the requirements of international organisations for knowledge regarding the sector.

The Hotel Price Index (HPI) is a statistical measure of the monthly evolution of prices applied to clients by hotel entrepreneurs.

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: one month.

Reference period of the information: seven consecutive days of each month, chosen randomly in such a way that, between all the establishments, the entire month is covered.

Sample design: stratified sampling by province and establishment category, with 4 and 5-gold star categories being exhaustive.

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 operation in INEbase.

INE statistics are produced in accordance with the Code of Good Practice for European Statistics, which is the basis for the institution's quality policy and strategy. For more information, see the section on [Quality at INE and the Code of Best Practices](#) on the INE website.

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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

November 2023

Provisional Data

22nd December 2022

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	6.803.578	3.572.473	3.231.105	19.049.140	6.916.610	12.132.531	2,80
HOTELS: Golden stars							
Five	475.167	137.972	337.195	1.660.931	268.233	1.392.699	3,50
Four	3.406.417	1.639.879	1.766.538	10.212.044	3.135.441	7.076.603	3,00
Three	1.521.132	858.400	662.731	4.211.124	1.700.365	2.510.758	2,77
Two	503.437	340.519	162.919	1.090.294	652.859	437.436	2,17
One	218.339	129.020	89.319	479.630	254.743	224.886	2,20
INNS: Silver stars							
Two and three	375.395	262.141	113.254	747.983	489.142	258.841	1,99
One	303.691	204.542	99.149	647.135	415.827	231.308	2,13
Annual rate	8,26	0,89	17,77	7,86	-1,85	14,30	-0,37
Cumulative annual rate	8,89	2,35	15,79	8,38	1,14	12,67	-0,46

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	12.792	575.337	1.199.251	52,49	60,96	64,18	177.487
HOTELS: Golden stars							
Five	308	44.992	94.958	57,90	64,86	68,20	32.889
Four	2.108	263.245	565.334	59,61	67,94	73,70	91.524
Three	1.977	121.481	260.296	53,40	62,97	65,76	32.278
Two	1.622	46.086	90.794	39,91	49,24	50,35	7.377
One	932	21.459	41.790	38,14	46,76	46,94	3.144
INNS: Silver stars							
Two and three	2.509	38.210	72.584	34,24	42,26	42,01	5.304
One	3.336	39.864	73.496	29,30	36,10	38,43	4.971
Annual rate	2,30	2,16	2,51	5,07	3,77	5,01	6,96

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 Tenerife	23.245	228.331	100.255	1.658.017	78,68	80,17	89,97	6,99	18.383
Isla de Tenerife	62.514	284.528	216.016	2.010.147	78,19	80,25	89,41	6,41	22.327
Sur de Gran Canaria	12.396	173.099	61.136	1.368.036	76,81	78,33	89,64	7,70	12.911
Isla de Gran Canaria	37.082	197.874	119.262	1.470.945	75,98	78,24	89,49	6,77	14.172
Isla de Lanzarote	18.903	112.755	80.278	872.834	74,69	75,66	92,60	7,24	8.612
Isla de La Gomera	1.776	5.612	4.851	33.832	73,15	72,94	85,65	5,24	418
isla de Fuerteventura	12.752	126.269	53.472	1.040.997	70,87	73,82	86,24	7,87	10.108
Barcelona	156.838	541.401	296.304	1.444.795	63,15	70,30	79,01	2,49	14.627

Tourist area with a greater number of overnight stays per month¹

Costa del Sol	119.571	208.241	268.510	866.592	54,02	61,22	69,16	3,46	10.856
Costa Blanca	136.797	145.615	385.678	674.367	51,85	61,89	60,22	3,75	8.905
Isla de Mallorca	31.009	69.208	61.904	326.828	49,64	58,34	61,67	3,88	5.453
Costa Barcelona	102.481	103.399	177.455	207.536	46,11	50,30	61,75	1,87	3.255
Palma - Calvià	27.384	54.927	54.898	237.509	47,74	56,36	60,42	3,55	4.220
Costa Brava	55.763	67.718	97.310	164.205	38,51	51,71	46,14	2,12	2.905
Costa de la Luz de Cádiz	59.767	35.168	122.472	102.782	37,79	48,42	50,35	2,37	2.756
Rías Baixas	67.706	15.371	137.587	27.034	32,57	41,72	38,34	1,98	2.064

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

Adeje	7.348	122.231	32.914	889.061	81,08	82,90	90,79	7,12	10.437
Arona	6.006	67.219	24.582	495.502	80,47	79,03	89,92	7,10	3.750
Puerto de La Cruz	17.688	40.548	75.447	291.955	79,90	83,45	89,79	6,31	2.888
San Bartolomé de Tirajana	10.467	125.845	52.632	979.519	77,01	78,77	89,56	7,57	9.710
Tías	2.471	36.032	11.931	300.814	76,78	76,23	94,24	8,12	2.653
Mogán	1.980	47.166	8.449	390.765	76,74	77,51	90,10	8,12	3.247
Teguise	6.455	24.362	25.460	183.265	76,05	78,23	97,66	6,77	1.728
Pájara	4.683	70.501	22.451	623.398	73,62	75,52	86,48	8,59	6.182
Yaiza	5.576	47.914	33.391	372.207	72,90	73,86	89,34	7,58	4.016
Palmas de Gran Canaria, Las	19.921	21.311	47.718	91.296	71,14	79,46	90,33	3,37	1.018

Tourist site with a greater number of overnight stays per month¹

Madrid	407.680	434.214	673.459	994.287	61,15	70,32	78,42	1,98	12.823
Barcelona	139.647	509.673	268.273	1.370.535	64,07	71,53	79,42	2,52	14.037
Benidorm	65.910	83.100	254.797	463.828	56,43	65,81	63,46	4,82	5.689
Sevilla	110.409	123.479	198.622	291.077	63,55	72,02	76,13	2,09	3.956
Valencia	82.593	82.634	136.714	207.062	59,69	71,65	76,40	2,08	2.768
Torremolinos	20.861	39.492	63.672	203.535	62,82	70,47	72,93	4,43	2.120
Palma de Mallorca	29.416	51.232	59.651	200.921	51,79	60,53	63,87	3,23	3.645
Málaga	47.540	69.986	83.539	168.593	62,27	71,25	79,29	2,15	2.136
Granada	71.849	68.998	126.185	120.456	55,13	71,23	65,34	1,75	1.799
Oliva, La	4.604	30.285	18.098	220.447	69,63	76,07	86,30	6,84	2.185

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	6.803.578	100,00	19.049.140	100,00
Residents in Spain	3.572.473	52,51	6.916.610	36,31
Residents abroad	3.231.105	47,49	12.132.531	63,69
Total Residents abroad	3.231.105	100,00	12.132.531	100,00
TOTAL Residents in EU (without Spain)	1.580.042	48,90	6.452.904	53,19
- Germany	339.529	10,51	2.039.783	16,81
- Austria	27.882	0,86	123.062	1,01
- Belgium	79.807	2,47	364.905	3,01
- Denmark	40.450	1,25	204.738	1,69
- Finland	42.984	1,33	274.556	2,26
- France	278.654	8,62	740.345	6,10
- Greece	14.251	0,44	38.064	0,31
- Ireland	70.466	2,18	335.915	2,77
- Italy	193.815	6,00	546.226	4,50
- Luxembourg	5.098	0,16	25.922	0,21
- Netherlands	116.644	3,61	458.877	3,78
- Poland	71.447	2,21	271.274	2,24
- Portugal	98.352	3,04	194.285	1,60
- Czech Republic	20.300	0,63	75.427	0,62
- Sweden	73.925	2,29	425.242	3,50
-Other EU countries ¹	106.437	3,29	334.282	2,76
Norway	42.945	1,33	275.514	2,27
United Kingdom	523.363	16,20	2.757.054	22,72
Switzerland	51.892	1,61	200.682	1,65
Rest of Europe	111.227	3,44	326.603	2,69
Japan	29.069	0,90	59.077	0,49
Republic of China	68.215	2,11	120.308	0,99
United States of America	250.556	7,75	628.593	5,18
Rest of America	293.787	9,09	695.294	5,73
Africa	53.465	1,65	141.602	1,17
Other countries	226.546	7,01	474.899	3,91

Note: Since March 2022, "Russia" is included in the aggregate "Rest of Europe".

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

Hotel Price Index (HPI). 2008 Base

November 2023

Provisional data

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

	Index	Annual growth rate
TOTAL	132,51	8,57
Andalucía	128,29	10,30
Aragón	106,53	11,18
Asturias, Principado de	96,00	2,26
Balears, Illes	141,38	11,30
Canarias	165,37	7,25
Cantabria	104,28	6,04
Castilla y León	103,21	4,79
Castilla - La Mancha	103,31	4,88
Cataluña	120,37	10,43
Comunitat Valenciana	141,09	11,42
Extremadura	103,29	0,96
Galicia	109,56	1,88
Madrid, Comunidad de	118,21	9,02
Murcia, Región de	97,44	7,73
Navarra, Comunidad Foral de	104,79	7,95
País Vasco	116,39	6,10
Rioja, La	107,79	7,42
Ceuta	90,81	3,94
Melilla	98,71	-6,50

2. National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	132,51	8,57
HOTELS: Gold stars		
Five	125,82	4,67
Fourth	135,40	8,98
Three	135,79	11,80
Two	121,93	7,58
One	115,40	4,63
HOSTALS: Silver stars		
Three and two	117,24	8,33
One	153,51	10,95

Indicators on the Profitability of the Hotel Sector

November 2023

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	104,89	9,86	67,06	15,08
Andalucía	90,26	12,62	52,79	21,06
Aragón	67,15	12,17	32,95	24,62
Asturias, Principado de	59,08	7,02	23,57	16,07
Balears, Illes	100,19	13,85	58,38	21,55
Canarias	132,95	8,91	117,98	14,30
Cantabria	65,91	8,31	27,53	13,87
Castilla y León	63,37	7,01	27,93	15,25
Castilla - La Mancha	59,02	2,74	24,89	9,10
Cataluña	118,76	11,62	76,97	16,78
Comunitat Valenciana	80,62	13,76	48,84	12,55
Extremadura	60,99	2,10	26,24	5,36
Galicia	61,99	5,35	23,26	-0,81
Madrid, Comunidad de	120,30	7,56	92,81	16,25
Murcia, Región de	64,17	11,61	33,81	19,14
Navarra, Comunidad Foral de	73,22	4,44	35,87	7,95
País Vasco	88,54	7,04	51,81	10,51
Rioja, La	73,70	4,11	34,33	4,68
Ceuta	63,30	2,31	32,44	-5,27
Melilla	68,52	-10,68	41,84	-15,65

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	104,89	9,86	67,06	15,08
HOTELS: Gold stars				
Five	228,55	9,17	151,49	11,90
Four	109,55	8,85	80,18	15,34
Three	82,55	13,91	54,20	18,11
Two	64,51	6,80	32,30	7,29
One	69,46	17,51	33,04	25,26
GUESTHOUSES: Silver stars				
Three and two	61,79	8,37	26,56	17,75
One	55,09	15,26	20,98	15,73

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