

23 June 2014

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
May 2014. *Provisional data*

Overnight stays in hotel establishments registered in May an increase of 1.4%, as compared to the same month of 2013

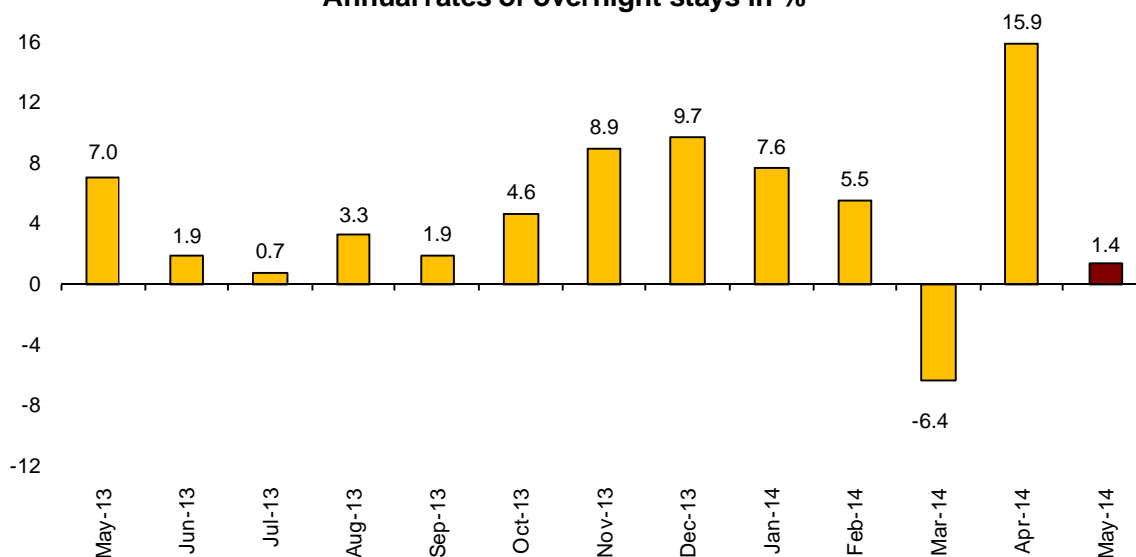
Hotels earn 38.3 euros per available room and invoice an average of 67.5 euros per occupied room

In May, a total of 26.7 million overnight stays were registered in hotel establishments, indicating an increase of 1.4% as compared with the same month of 2013. Overnight stays for residents in Spain increased 4.0% and those of non-residents did so by 0.2%.

The average stay decreased 3.2%, as compared with May 2013, standing at 3.2 nights per guest.

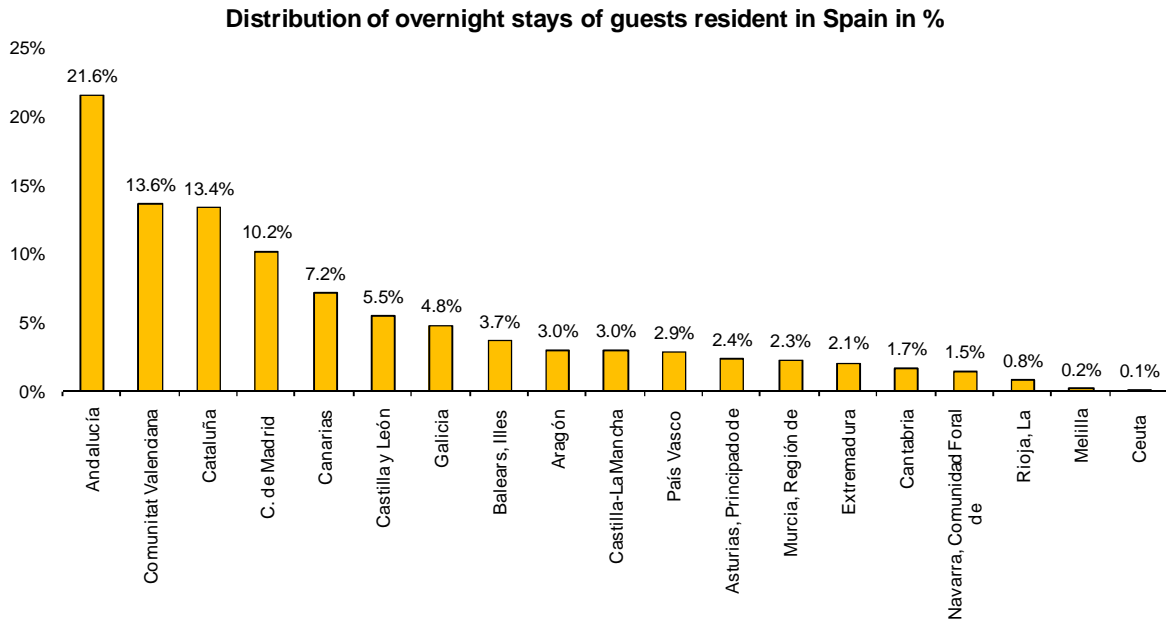
In the first five months of 2014, overnight stays increased 4.3% as compared with the same period of the previous year.

Annual rates of overnight stays in %

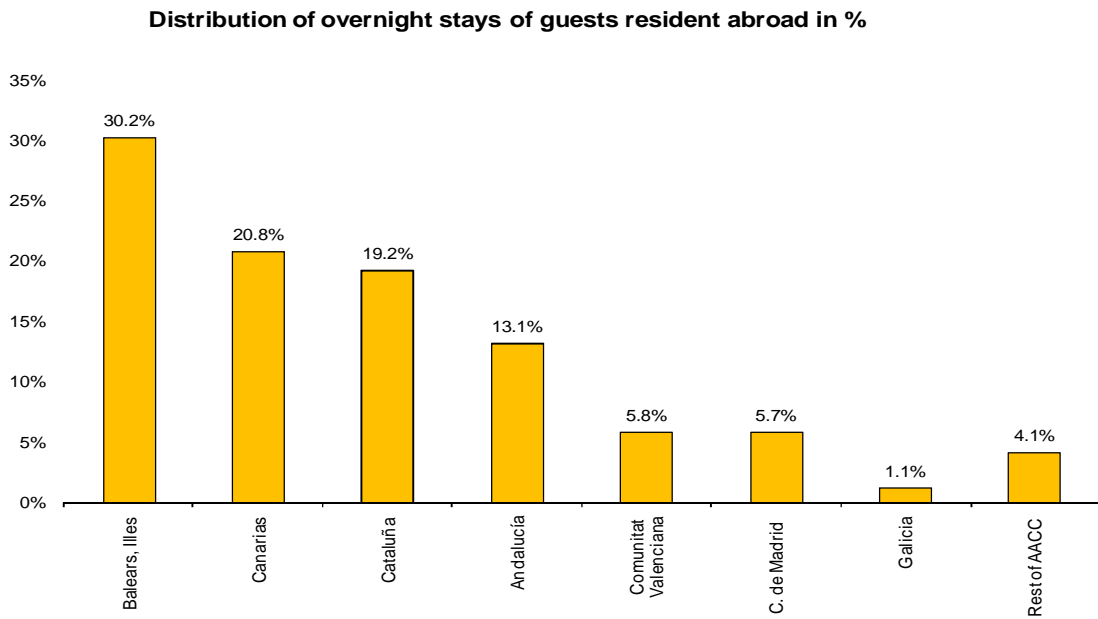


Main destinations

In May, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 12.0%, -3.7%, 2.6% and 15.3%, respectively.



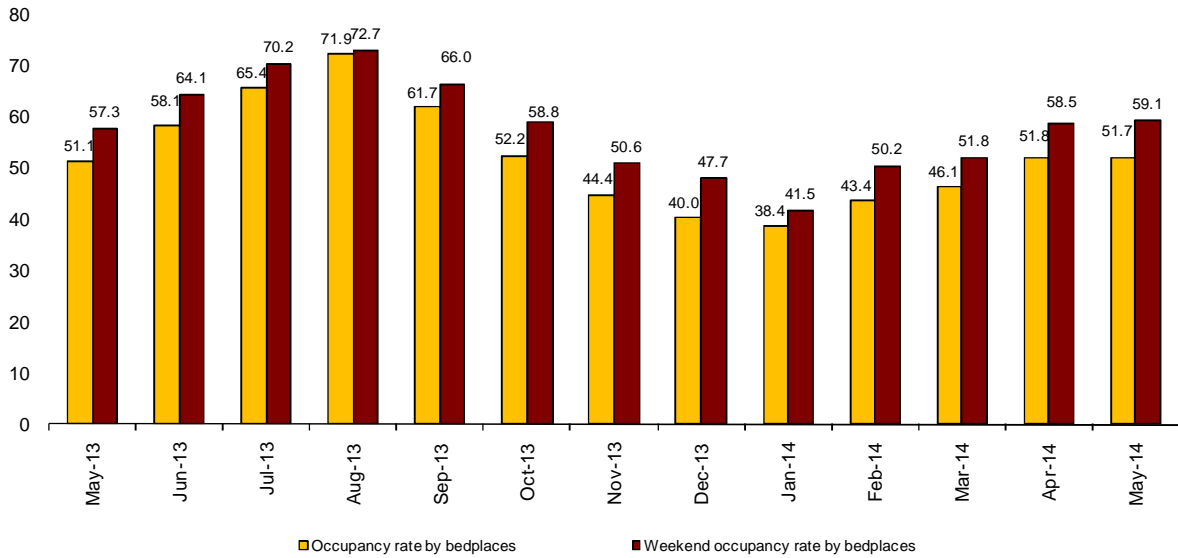
The main destination chosen by non-residents was Illes Balears, with 30.2% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 6.8%, as compared with May 2013. Illes Balears was followed by Canarias (20.8% of the total) and Cataluña (19.2%). The overnight stays of non-residents in these Autonomous Communities increased by 7.5% and decreased by 2.6%, respectively.



Hotel Occupancy

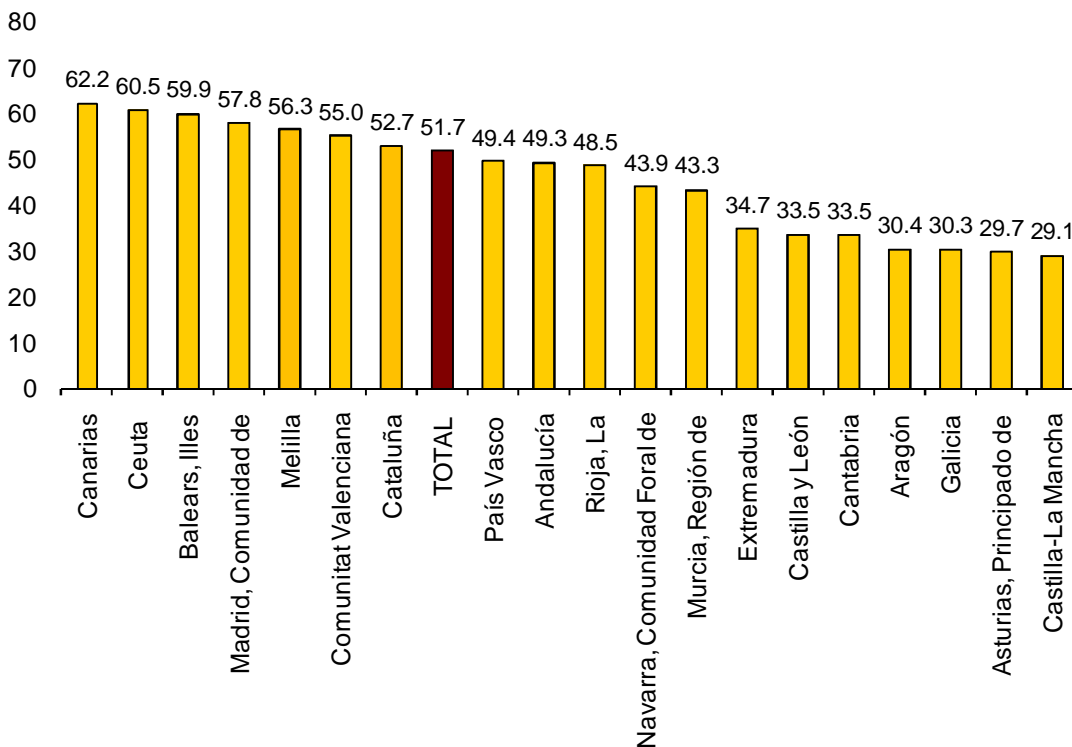
In terms of occupancy, 51.7% of the available bedplaces were occupied in May, with an annual increase of 1.1%. The weekend occupancy rate by bedplaces increased 3.1%, standing at 59.1%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in May (62.2%), followed by Illes Balears (59.9%) and Comunidad de Madrid (57.8%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, Barcelona registered in May both the highest occupancy rate by bedplaces (73.1%) and the highest weekend occupancy rate (80.1%). Mallorca recorded the highest number of overnight stays, with more than 4.5 million.

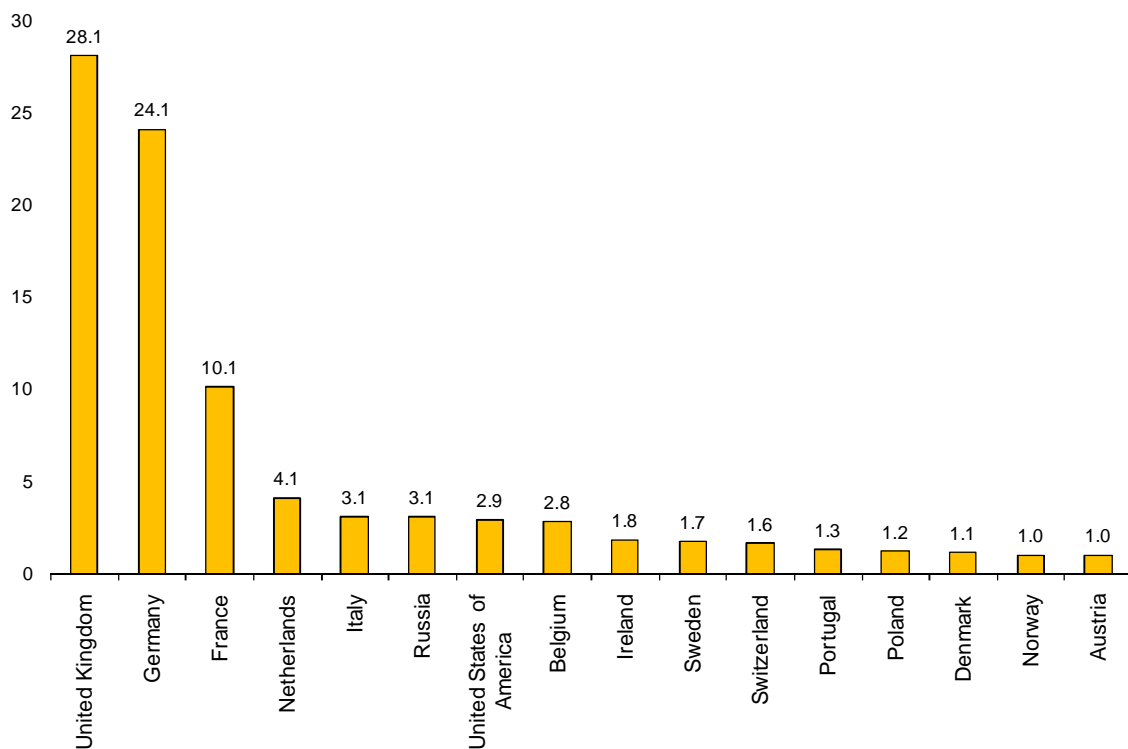
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Benidorm. Benidorm reached the highest occupancy rate by bedplaces (78.5%) and Córdoba the highest weekend occupancy rate (86.8%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 28.1% and 24.1%, respectively, of the total of overnight stays in hotel establishments by non-residents in May. The British market experienced a decrease of 0.7% and the German market did so by 6.0%.

Overnight stays of guests from France, The Netherlands and Italy (the following countries of origin) registered annual rates of 9.3%, -7.5% and 17.8%, respectively.

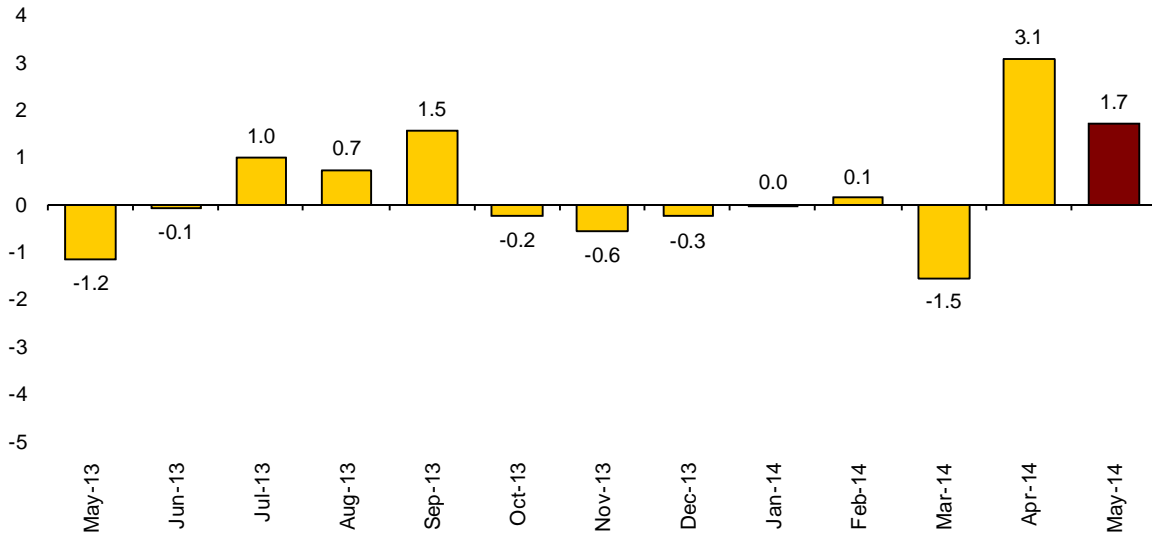
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 1.7% in May, that is, 1.4 points lower than that of the previous month and 2.9 points over that registered in the previous year.

Hotel Prices Index. Annual variation rate



Cataluña, Illes Balears, Andalucía and Canarias were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of May (together they represented 71.7% of the total weight). Hotel prices increased 3.8% in the annual rate in Canarias, 3.5% in Andalucía, 1.0% in Illes Balears and 0.9% in Cataluña.

By hotel category, the increases in hotel prices were registered in five-golden-star hotels (2.9%), four-golden-star hotels (1.8%), three-golden-star hotels (1.7%) and three and two-silver-star hotels (0.6%).

In turn, the prices registered a decrease in two golden-star establishments (-0.7%), one-silver-star establishments (-0.5%) and one-golden-star hotels (-0.2%).

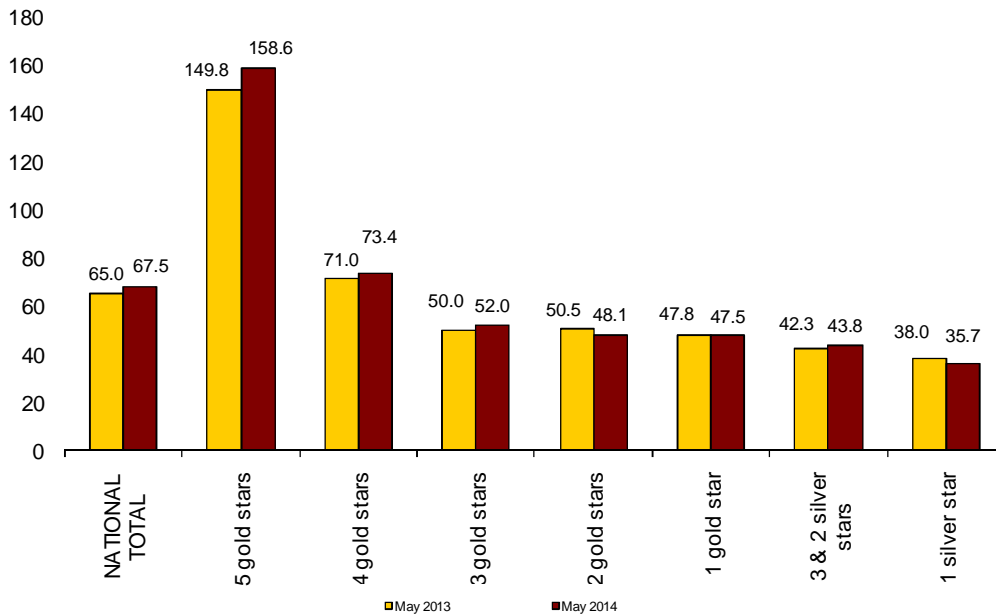
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in May was 67.5 euros, which represented an increase of 3.9% as compared with the same month of 2013.

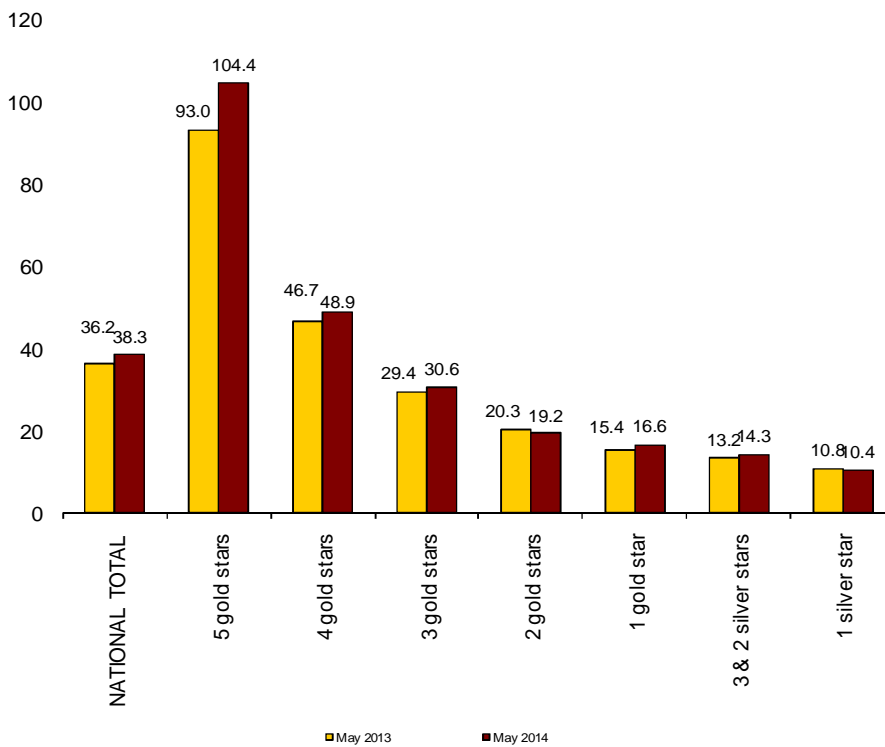
In turn, the daily average revenue per available room (RevPAR), that is conditioned by the occupancy registered in hotel establishments, reached 38.3 euros, with an increase of 5.7%.

By category, the average invoicing was 158.6 euros for five-star hotels, 73.4 euros for four-star hotels and 52.0 euros for three-star hotels. Income per available room for the same categories was 104.4, 48.9 and 30.6 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)

May 2014

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	8,494,328	3,881,833	4,612,494	26,727,101	8,527,489	18,199,612	3.15
HOTELS: Golden stars							
Five	451,039	132,870	318,169	1,465,742	273,967	1,191,775	3.25
Four	3,980,635	1,757,837	2,222,798	13,122,078	3,800,286	9,321,792	3.30
Three	2,509,684	1,110,695	1,398,989	8,712,898	2,669,709	6,043,189	3.47
Two	578,726	341,271	237,455	1,352,680	710,008	642,672	2.34
One	220,498	133,551	86,947	464,833	244,925	219,908	2.11
INNS: Silver stars							
Two and three	413,415	244,698	168,717	872,123	470,733	401,391	2.11
One	340,331	160,912	179,419	736,747	357,862	378,885	2.16
Annual rate	4.70	5.54	4.00	1.40	4.03	0.21	-3.16
Cumulative annual rate	4.96	4.76	5.19	4.29	2.83	5.16	-0.65

2. Open establishments, capacity, occupancy and employed personnel by category of establishment

Category	Estimated open establishments	Estimated bed-places	Occupancy rate			Employed personnel
			Of bed-places	Of bed-places at weekend	Of bedrooms	
TOTAL	15,894	1,648,173	51.69	59.09	56.90	205,004
HOTELS: Golden stars						
Five	268	83,275	56.09	64.84	66.11	25,131
Four	2,286	708,677	58.98	66.56	66.61	97,566
Three	2,809	497,697	55.73	62.27	59.28	54,961
Two	2,004	121,757	35.61	45.45	40.68	9,786
One	1,233	50,262	29.65	38.41	34.68	4,062
INNS: Silver stars						
Two and three	3,164	96,966	28.88	36.45	32.61	7,190
One	4,130	89,538	26.45	31.62	30.13	6,307
Annual rate	0.85	0.56	1.13	3.08	1.55	2.24

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									
Barcelona	122,546	553,001	234,132	1,544,309	73.07	80.11	82.55	2.63	12,552
Sur de Tenerife	37,102	163,833	142,781	1,247,499	68.59	71.78	75.47	6.92	11,968
Costa Blanca	164,836	160,484	643,719	765,751	66.63	76.26	69.79	4.33	8,480
Isla de Lanzarote	18,056	74,917	95,273	607,822	65.42	66.29	73.86	7.56	5,153
Palma - Calvià	32,292	351,387	95,476	1,745,983	65.31	71.69	69.06	4.80	11,283
Isla de Tenerife	69,971	187,906	258,052	1,430,669	64.01	67.39	70.24	6.55	15,101
Isla de Fuerteventura	13,604	95,545	45,922	811,661	63.01	65.63	71.33	7.86	6,795
Costa de Gipuzkoa	31,651	34,221	57,025	66,878	62.48	79.04	68.97	1.88	1,104

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

Isla de Mallorca	62,256	739,026	185,829	4,366,475	62.26	65.32	66.42	5.68	30,373
Costa del Sol	157,767	284,506	435,458	1,239,590	61.99	69.29	69.68	3.79	11,658
Isla de Gran Canaria	55,644	105,155	194,188	895,666	59.11	61.87	65.36	6.78	9,964
Sur de Gran Canaria	35,354	98,387	145,357	869,930	62.43	64.47	68.22	7.59	9,004
Costa Brava	105,194	197,078	232,867	685,795	44.04	59.03	47.92	3.04	6,714
Islas de Ibiza-Formentera	30,608	164,415	90,359	825,299	56.73	53.59	55.94	4.70	6,304
Costa Daurada	110,970	139,410	287,847	602,357	49.57	59.11	51.70	3.56	4,824
Costa de la Luz de Cádiz	108,910	58,961	257,495	247,342	41.81	55.52	48.20	3.01	4,514

Tourist site with a greater occupancy rate per month

Benidorm	84,100	97,140	456,391	553,503	78.54	86.55	79.80	5.57	5,224
Torremolinos	38,002	62,697	156,437	332,340	76.59	82.86	79.73	4.85	2,472
Córdoba	49,558	46,526	88,314	69,974	75.54	86.83	79.17	1.65	925
Barcelona	111,272	523,174	211,523	1,474,340	73.81	80.72	83.17	2.66	12,119
Sevilla	106,914	129,742	190,918	260,457	73.08	85.58	80.11	1.91	3,102
Arona	7,482	51,444	34,551	396,339	71.67	72.55	77.97	7.31	3,134
Yaiza	9,344	38,306	56,359	311,432	71.67	70.85	79.93	7.72	2,657
Adeje	18,422	84,946	72,669	669,142	70.54	75.08	78.95	7.18	6,378
Palma	21,269	176,030	59,603	819,114	70.54	80.96	76.81	4.45	5,448
Muro	3,158	45,355	8,123	328,601	69.47	67.99	72.36	6.94	2,038

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

Madrid	373,277	415,153	645,363	944,199	62.69	72.95	75.10	2.02	11,548
Calvià	8,068	158,327	26,036	848,540	59.99	63.85	61.04	5.26	5,245
San Bartolomé de Tirajana	25,203	73,737	112,373	671,006	64.31	64.72	70.46	7.92	7,117
Salou	52,480	82,206	155,007	417,301	57.38	67.79	59.14	4.25	2,797
Pájara	5,372	58,202	19,628	518,580	64.41	66.28	70.70	8.47	4,455
Lloret de Mar	31,128	76,116	100,150	332,417	51.04	68.17	54.67	4.03	2,135
Alcúdia	3,625	50,847	10,135	388,439	67.80	71.64	75.32	7.32	4,298
Sant Llorenç des Cardassar	3,165	54,569	8,960	384,140	57.13	55.44	64.18	6.81	2,463
Granada	68,050	94,222	125,306	169,852	66.48	78.55	70.63	1.82	1,611
Sant Josep de Sa Talaia	9,577	62,577	21,507	272,688	69.32	68.74	69.38	4.08	1,983

* Not taken into account those included in the preceding table because they are in the bigger occupancy rate tables too.

8. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	8,494,328	100.00	26,727,101	100.00
Residents in Spain	3,881,833	45.70	8,527,489	31.91
Residents abroad	4,612,494	54.30	18,199,612	68.09
Total Residents abroad	4,612,494	100.00	18,199,612	100.00
Total Residents in E.U. (without Spain)	3,404,657	73.81	15,051,602	82.70
- Germany	789,451	17.12	4,383,307	24.08
- Austria	50,911	1.10	179,021	0.98
- Belgium	111,176	2.41	507,754	2.79
- Denmark	41,889	0.91	191,885	1.05
- Finland	30,086	0.65	115,450	0.63
- France	622,500	13.50	1,831,992	10.07
- Greece	9,597	0.21	28,309	0.16
- Ireland	74,872	1.62	322,475	1.77
- Italy	203,739	4.42	566,040	3.11
- Luxembourg	7,804	0.17	34,555	0.19
- Netherlands	170,608	3.70	743,371	4.08
- Poland	50,480	1.09	226,480	1.24
- Portugal	99,390	2.15	236,166	1.30
- United Kingdom	988,760	21.44	5,113,355	28.10
- Czech Republic	16,001	0.35	57,512	0.32
- Sweden	72,979	1.58	308,701	1.70
- Other EU countries*	64,414	1.40	205,228	1.13
Norway	45,292	0.98	186,159	1.02
Russia	116,446	2.52	556,894	3.06
Switzerland	79,051	1.71	299,302	1.64
Rest of Europe	83,335	1.81	249,292	1.37
Japan	61,090	1.32	99,164	0.54
United States of America	240,520	5.21	519,667	2.86
Rest of America	248,204	5.38	551,906	3.03
Africa	39,924	0.87	98,092	0.54
Other countries	293,975	6.37	587,534	3.23

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

Hotel Price Index (HPI). 2008 Base

May 2014

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	91.4	1.7
Andalucía	90.0	3.5
Aragón	72.2	-2.8
Asturias, Principado de	83.1	-0.4
Balears, Illes	101.7	1.0
Canarias	102.4	3.8
Cantabria	88.4	4.9
Castilla y León	86.6	1.4
Castilla - La Mancha	84.9	-0.5
Cataluña	90.5	0.9
Comunitat Valenciana	89.4	3.2
Extremadura	85.9	-0.6
Galicia	89.4	-0.3
Madrid, Comunidad de	75.4	-0.8
Murcia, Región de	76.4	-0.5
Navarra, Comunidad Foral de	83.5	1.6
País Vasco	88.6	-0.2
Rioja, La	85.1	2.3
Ceuta	104.3	2.5
Melilla	100.4	2.3

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	91.4	1.7
HOTELS: Gold stars		
Five	89.8	2.9
Fourth	89.6	1.8
Three	94.1	1.7
Two	89.2	-0.7
One	98.3	-0.2
HOSTALS: Silver stars		
Three and two	89.4	0.6
One	96.7	-0.5

Indicators on the Profitability of the Hotel Sector

May 2014

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	67.5	3.9	38.3	5.7
Andalucía	69.9	6.5	39.2	8.6
Aragón	50.0	-1.8	17.5	8.4
Asturias, Principado de	51.6	4.4	17.0	12.6
Balears, Illes	60.9	2.5	37.9	-3.1
Canarias	75.1	5.1	52.1	7.4
Cantabria	54.1	0.4	18.8	0.7
Castilla y León	52.1	0.8	19.0	4.3
Castilla - La Mancha	54.4	-0.3	18.1	13.7
Cataluña	78.3	4.8	45.7	4.5
Comunitat Valenciana	54.8	4.8	32.3	5.5
Extremadura	52.5	-3.3	20.0	3.1
Galicia	49.8	0.5	16.7	6.1
Madrid, Comunidad de	77.0	0.2	53.3	16.0
Murcia, Región de	49.3	-2.4	23.0	-1.7
Navarra, Comunidad Foral de	59.4	2.3	29.6	26.3
País Vasco	71.9	0.7	42.4	5.1
Rioja, La	60.3	-0.1	34.0	9.4
Ceuta	71.2	7.4	37.2	-2.1
Melilla	63.5	0.8	44.1	49.4

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	67.5	3.9	38.3	5.7
HOTELS: Gold stars				
Five	158.6	5.9	104.4	12.3
Four	73.4	3.4	48.9	4.7
Three	52.0	4.0	30.6	3.8
Two	48.1	-4.7	19.2	-5.1
One	47.5	-0.7	16.6	7.8
GUESTHOUSES: Silver stars				
Three and two	43.8	3.5	14.3	7.8
One	35.7	-6.0	10.4	-3.9

(*) ADR: Average Daily Rate
RevPAR: Revenue per Available Room