

23 June 2015

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
May 2015. *Provisional data*

Overnight stays in hotel establishments register an increase of 5.0% in May, as compared to the same month of 2014

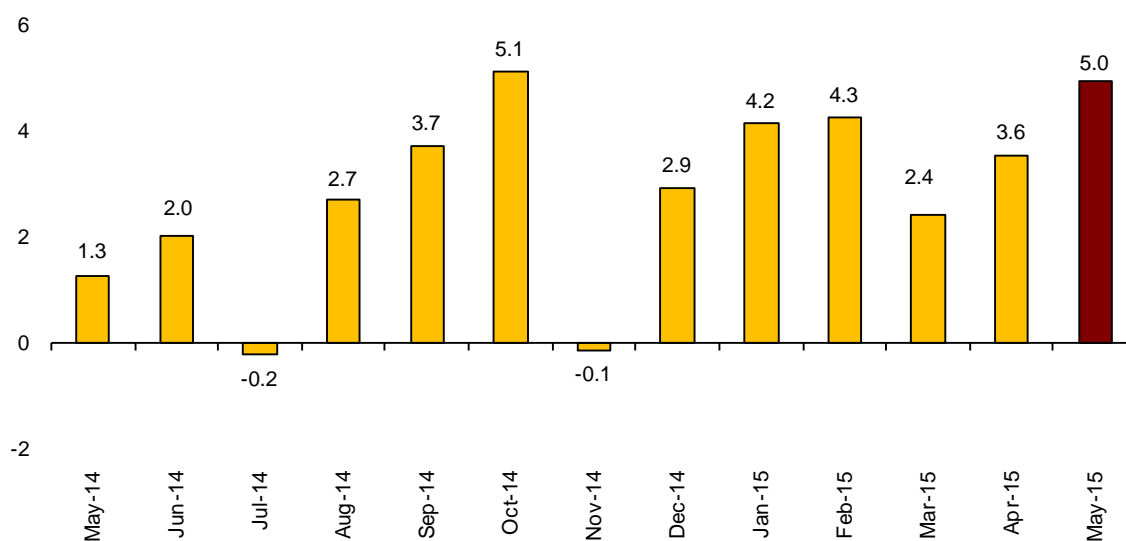
Hotels invoice an average of 71.2 euros per occupied room, which means an annual increase of 5.7%

In May, a total of 28.0 million overnight stays were registered in hotel establishments, 5.0% more than in the same month of 2014. Overnight stays for residents in Spain increased by 3.2% and those of non-residents did so by 5.8%.

The average stay decreased 1.6%, as compared to May 2014, standing at 3.1 nights per guest.

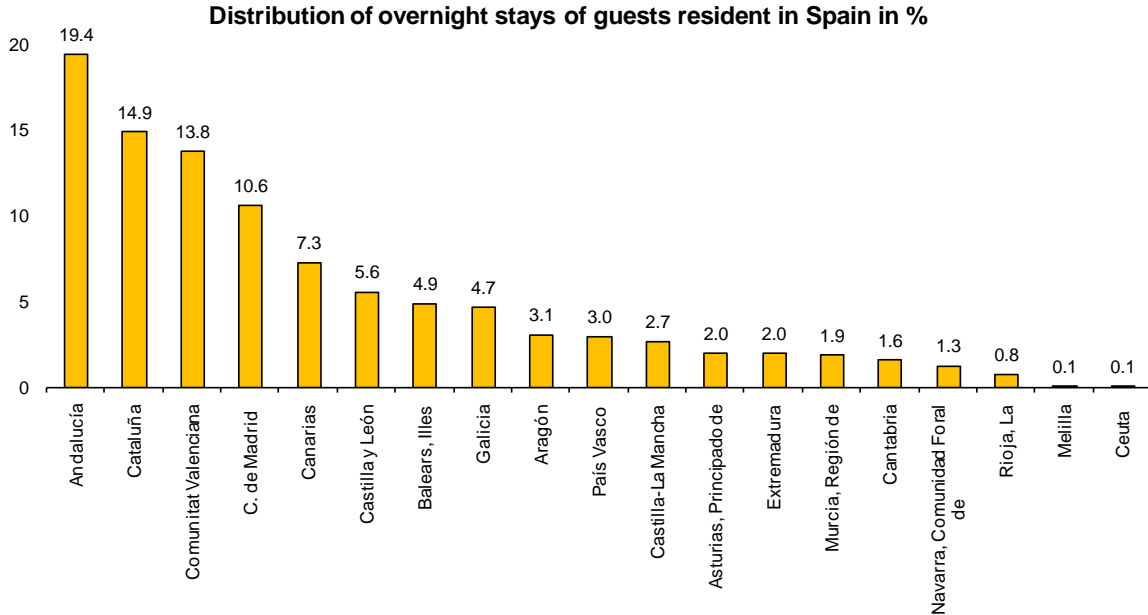
During the first five months of 2015, overnight stays increased 3.9%, as compared to the same period of the previous year.

Annual rates of overnight stays in %

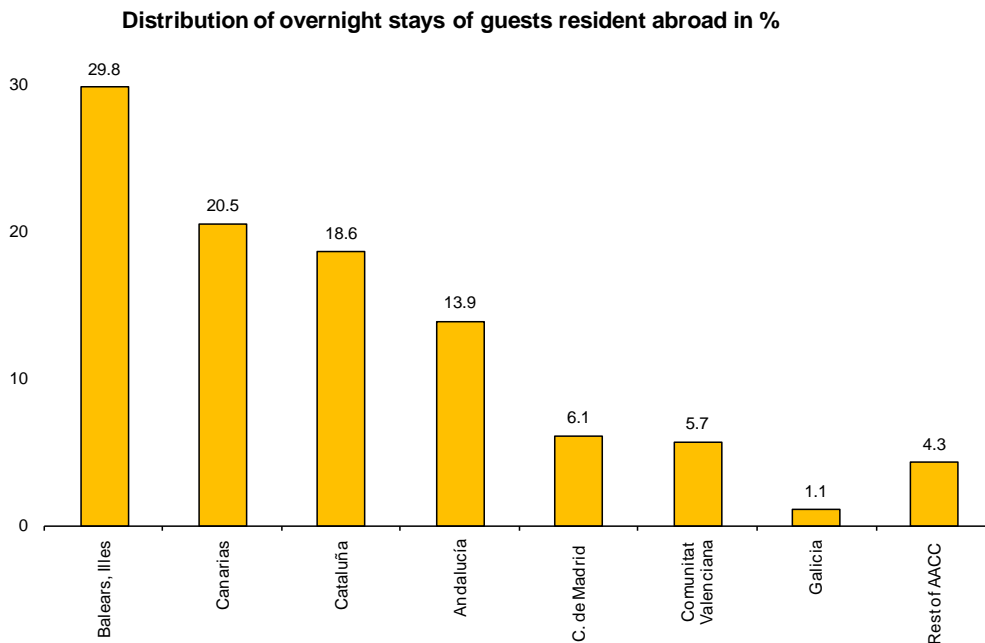


Main destinations

In May, Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of -6.8%, 13.8%, 4.2% and 7.3%, respectively.

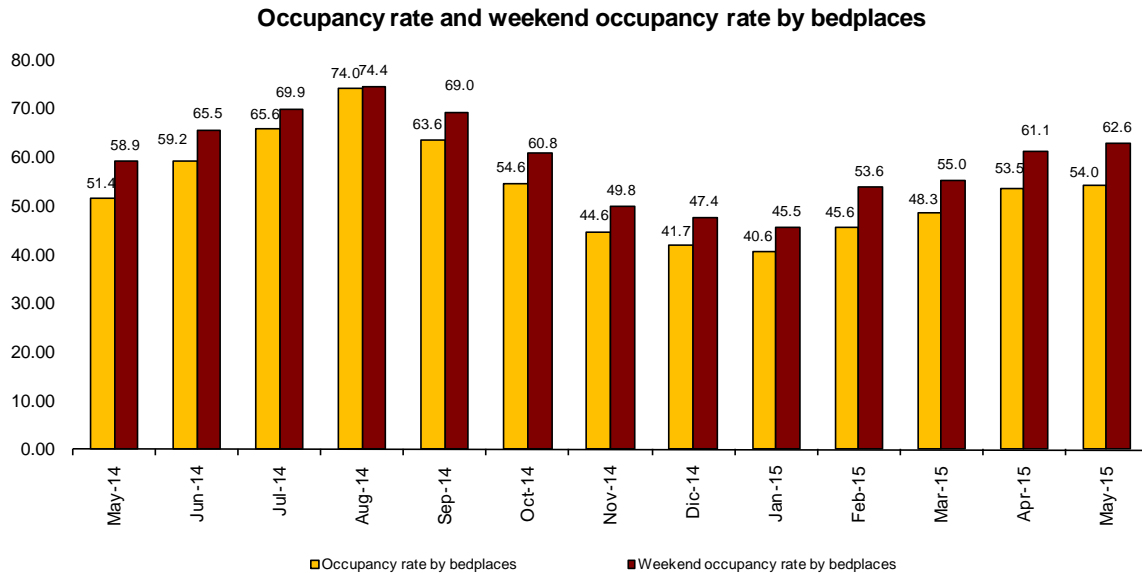


The main destination chosen by non-residents was Illes Balears, with 29.8% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 4.2% as compared to May 2014. The following destinations of non-residents were Canarias (20.5% of the total) and Cataluña (18.6%). Overnight stays in these communities increased by 3.9% and 2.7%, respectively.



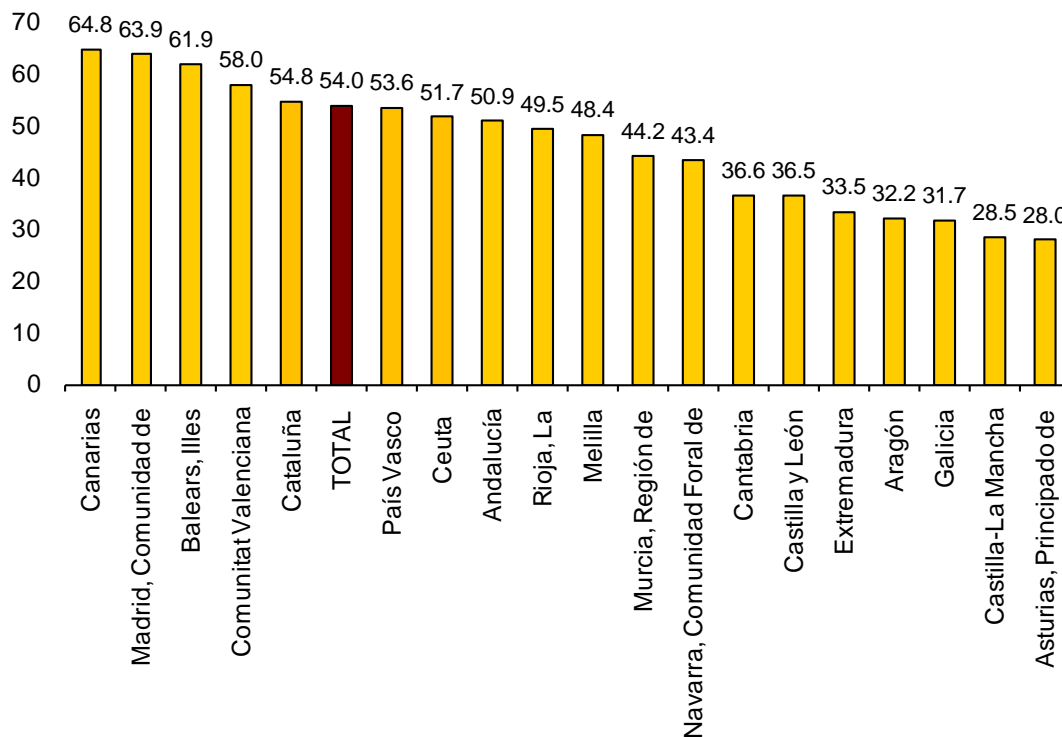
Hotel Occupancy

In May, 54.0% of the available bedplaces were occupied, indicating an annual increase of 5.2%. The weekend occupancy rate by bedplaces increased by 6.3%, standing at 62.6%.



Canarias registered the greatest occupancy rate by bedplaces in May (64.8%), followed by Madrid (63.9%) and Illes Balears (61.9%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, Barcelona registered the highest occupancy rate by bedplaces (75.9%), as well as the highest weekend occupancy rate (83.2%). The island of Mallorca recorded the highest number of overnight stays, with more than 4.8 million.

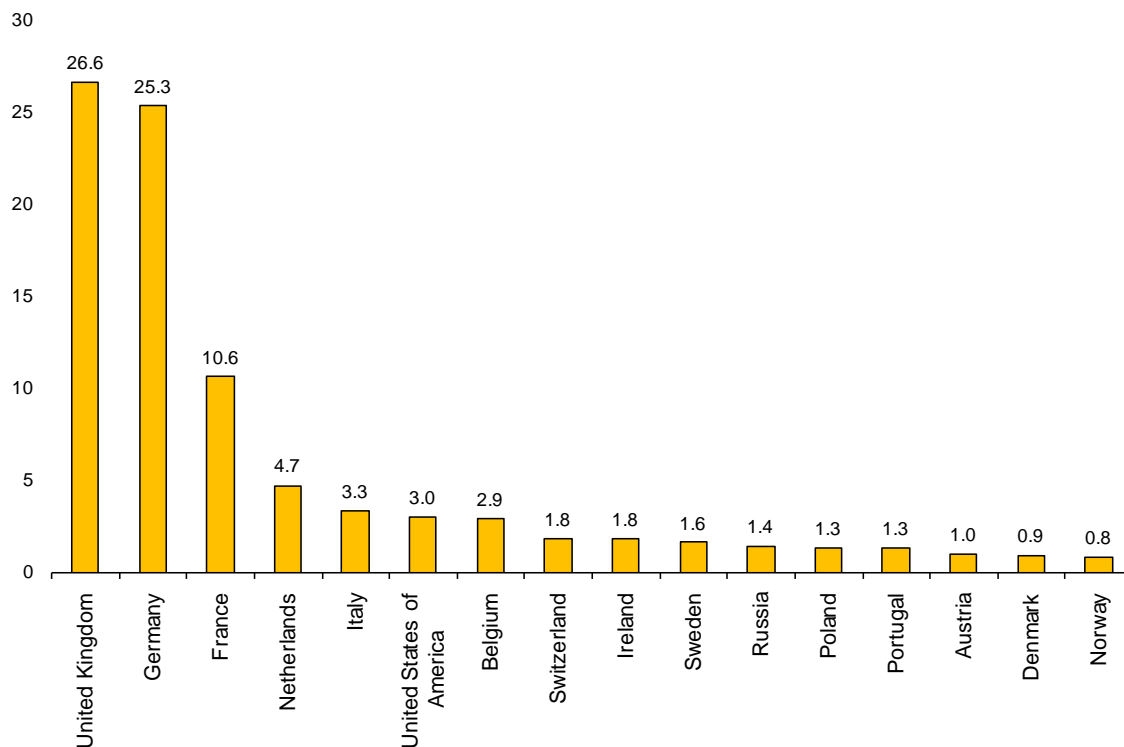
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Benidorm. Benidorm reached both the highest occupancy rate by bedplaces (80.0%) and the greatest weekend occupancy rate (87.4%).

Overnight stays according to the country of origin of the guests

Guests from United Kingdom and Germany concentrated 26.6% and 25.3%, respectively, of the total of overnight stays in hotel establishments by non-residents in May. The United Kingdom market decreased by 0.2%, while the German one increased by 11.3%.

Overnight stays of guests from France, Netherlands and Italy (the following countries of origin) registered annual rates of 12.7%, 20.7% and 13.2%, respectively.

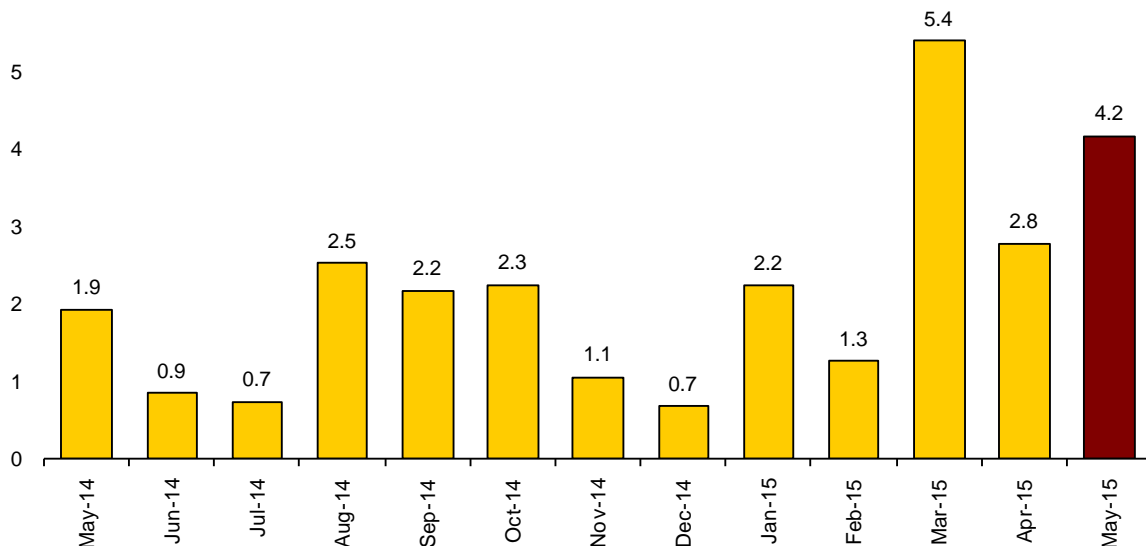
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 4.2% in May, that is, 1.4 points over than that of the previous month and 2.3 points under 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 (they represented 71.1% of the total). Hotel prices increased 6.8% in the annual rate in Illes Balears, 6.0% in Cataluña and 2.6% in Andalucía. The prices remained the same in Canarias.

By hotel category, the increase in hotel prices were registered in three-golden-star establishments (7.0%), two-silver-star establishments (4.3%), four-golden-star establishments (3.5%), five-golden-star establishments (3.4%), one-golden-star establishments (2.8%) and two-golden and one-silver establishments (0.8% in both cases).

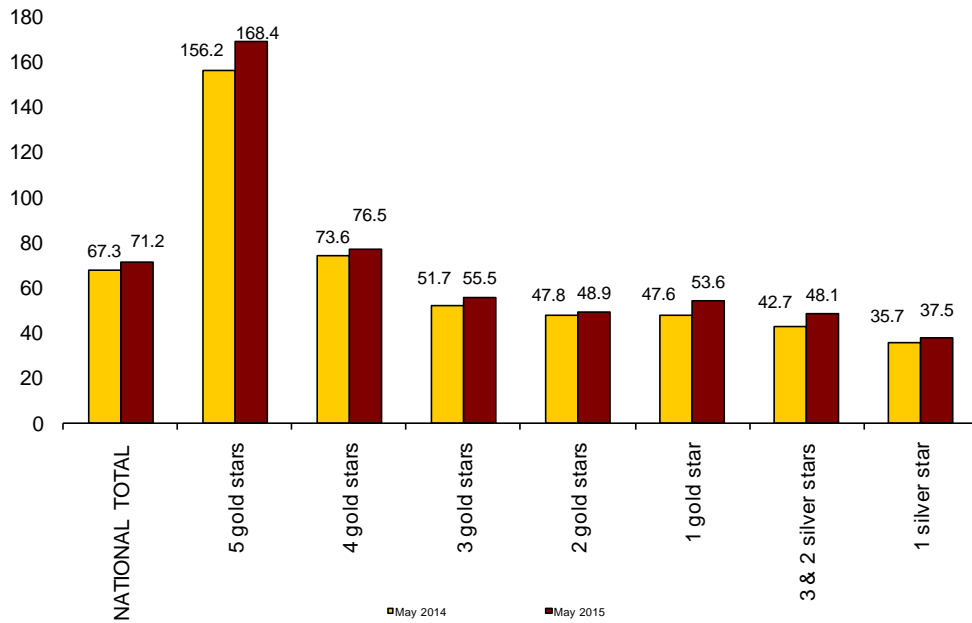
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in May was 71.2 euros in May, which represented an increase of 5.7% as compared to the same month of 2014.

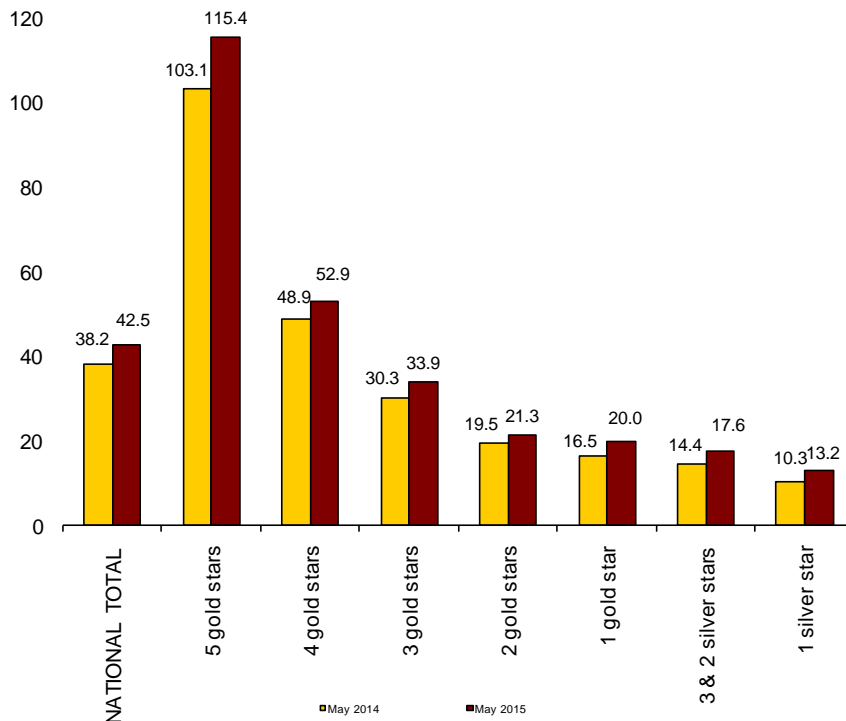
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 42.5 euros, with an increase of 11.4%.

By category, the average invoicing was 168.4 euros for five-star hotels, 76.5 euros for four-star hotels and 55.5 euros for three-star hotels. Income per available room for the same categories was 115.1, 52.9, and 33.9 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 2015

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	9,086,177	4,105,961	4,980,217	28,013,509	8,830,860	19,182,649	3.08
HOTELS: Golden stars							
Five	479,228	137,906	341,322	1,601,597	278,252	1,323,345	3.34
Four	4,266,958	1,849,445	2,417,513	13,855,435	3,910,243	9,945,191	3.25
Three	2,605,083	1,178,429	1,426,655	8,795,456	2,770,905	6,024,551	3.38
Two	621,564	353,912	267,652	1,477,163	704,468	772,695	2.38
One	257,823	147,529	110,295	513,486	269,762	243,723	1.99
INNS: Silver stars							
Two and three	456,169	261,582	194,587	931,626	483,225	448,400	2.04
One	399,352	177,158	222,194	838,747	414,005	424,742	2.10
Annual rate	6.67	5.23	7.88	4.95	3.16	5.80	-1.61
Cumulative annual rate	6.06	6.63	5.43	3.92	6.54	2.38	-2.02

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	15,627	798,571	1,650,460	54.04	62.64	60.05	209,052
HOTELS: Golden stars							
Five	273	40,929	84,946	60.08	68.40	68.89	26,400
Four	2,316	335,665	719,565	61.24	69.81	69.62	100,747
Three	2,778	236,256	492,456	56.83	65.01	61.53	53,488
Two	2,009	63,290	122,761	38.39	49.54	43.35	10,693
One	1,203	25,830	49,873	33.04	42.19	38.32	4,271
INNS: Silver stars							
Two and three	3,109	49,074	93,135	32.02	41.11	36.63	7,301
One	3,939	47,528	87,725	30.69	37.79	35.79	6,153
Annual rate	-1.96	-0.77	-0.36	5.18	6.30	5.71	1.61

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									
Barcelona	149,595	583,517	285,310	1,584,301	75.85	83.19	86.01	2.55	13,238
Isla de Lanzarote	18,884	91,890	97,071	701,259	71.70	73.99	78.83	7.21	5,766
Costa Blanca	176,981	168,168	663,188	795,037	69.28	79.17	71.09	4.22	8,310
Palma - Calvià	45,493	350,801	153,342	1,803,409	68.19	73.47	73.73	4.94	12,507
Sur de Tenerife	39,714	159,907	142,191	1,202,223	67.93	71.45	73.71	6.73	11,806
Isla de Fuerteventura	11,319	102,010	48,147	850,177	65.90	66.13	73.75	7.93	6,820
Sur de Gran Canaria	39,330	110,098	146,096	929,972	65.13	68.27	72.48	7.20	9,726
Isla de Tenerife	76,624	183,672	291,201	1,368,864	64.61	68.41	70.01	6.38	14,835

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

Isla de Mallorca	82,754	788,269	273,394	4,538,677	64.11	67.75	68.67	5.52	30,644
Costa del Sol	153,910	314,943	372,007	1,352,170	63.26	71.52	71.76	3.68	11,629
Isla de Gran Canaria	59,848	118,002	193,065	957,601	61.73	65.31	69.15	6.47	10,748
Costa Brava	140,411	216,665	277,937	714,339	47.78	65.35	49.55	2.78	6,791
Costa Barcelona	141,476	203,527	308,001	670,221	57.96	66.12	64.88	2.84	5,673
Islas de Ibiza-Formentera	29,661	153,718	95,481	783,468	55.56	58.85	54.58	4.79	7,145
Costa Daurada	133,631	142,110	299,930	555,527	44.62	57.86	50.59	3.10	4,900
Costa de la Luz de Cádiz	120,380	75,610	255,339	311,442	47.00	61.67	54.69	2.89	4,892

Tourist site with a greater occupancy rate per month

Benidorm	87,658	100,270	452,685	570,990	79.97	87.41	79.98	5.45	4,945
Barcelona	135,012	559,049	253,030	1,516,580	76.22	83.64	86.09	2.55	12,713
Córdoba	49,003	52,105	85,413	85,648	75.88	85.03	81.79	1.69	967
Pollença	1,256	18,735	2,660	120,017	74.72	79.87	77.00	6.14	1,168
Yaiza	8,463	44,675	55,530	338,891	74.58	78.07	82.98	7.42	2,927
Tías	4,213	28,200	20,289	212,007	73.13	74.04	79.00	7.17	1,593
Palma	27,710	172,700	91,453	824,553	72.79	79.51	78.45	4.57	5,957
Santanyi	5,527	35,725	12,946	244,021	71.80	79.07	73.13	6.23	1,367
Torremolinos	41,719	63,272	125,192	320,063	71.00	79.40	75.52	4.24	2,455
Sevilla	93,117	132,469	167,830	287,097	69.74	82.22	81.70	2.02	3,342

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

Madrid	378,171	467,766	660,226	1,075,759	68.57	77.57	81.20	2.05	11,012
Calvià	14,349	151,240	42,819	884,300	61.35	65.63	67.09	5.60	5,922
San Bartolomé de Tirajana	31,062	85,028	120,851	711,545	66.69	70.09	74.65	7.17	7,854
Adeje	18,749	82,848	63,880	641,266	68.90	73.59	75.84	6.94	6,421
Pájara	4,509	63,243	19,898	534,961	66.64	66.87	72.77	8.19	4,349
Salou	54,664	90,341	140,234	391,563	50.25	64.46	54.47	3.67	2,520
Sant Llorenç des Cardassar	1,532	63,233	5,414	454,552	65.42	59.16	73.87	7.10	2,685
Lloret De Mar	45,368	79,887	104,020	325,917	53.35	71.12	54.01	3.43	2,043
Arona	7,911	48,368	31,560	370,876	69.51	71.10	73.63	7.15	2,893
Alcúdia	7,522	49,117	25,784	352,132	61.55	63.43	61.68	6.67	2,065

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

4. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	9,086,177	100.00	28,013,509	100.00
Residents in Spain	4,105,961	45.19	8,830,860	31.52
Residents abroad	4,980,217	54.81	19,182,649	68.48
Total Residents abroad	4,980,217	100.00	19,182,649	100.00
Total Residents in E.U. (without Spain)	3,696,017	74.21	16,054,123	83.69
- Germany	884,028	17.75	4,861,109	25.34
- Austria	51,096	1.03	197,419	1.03
- Belgium	122,456	2.46	559,194	2.92
- Denmark	42,282	0.85	164,233	0.86
- Finland	30,207	0.61	107,941	0.56
- France	686,534	13.79	2,035,140	10.61
- Greece	12,957	0.26	32,444	0.17
- Ireland	82,385	1.65	342,677	1.79
- Italy	232,937	4.68	633,403	3.30
- Luxembourg	6,998	0.14	37,880	0.20
- Netherlands	212,219	4.26	891,068	4.65
- Poland	62,704	1.26	250,475	1.31
- Portugal	104,050	2.09	240,131	1.25
- United Kingdom	1,000,433	20.09	5,102,934	26.60
- Czech Republic	15,351	0.31	50,947	0.27
- Sweden	72,502	1.46	297,240	1.55
- Other EU countries*	76,877	1.54	249,887	1.30
Norway	41,597	0.84	159,626	0.83
Russia	67,596	1.36	264,423	1.38
Switzerland	93,086	1.87	350,995	1.83
Rest of Europe	89,912	1.81	271,456	1.42
Japan	49,050	0.98	86,501	0.45
United States of America	264,939	5.32	580,148	3.02
Rest of America	263,356	5.29	592,320	3.09
Africa	49,615	1.00	108,595	0.57
Other countries	365,049	7.33	714,462	3.72

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

Hotel Price Index (HPI). 2008 Base

May 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	95.4	4.2
Andalucía	92.6	2.6
Aragón	75.7	4.7
Asturias, Principado de	80.6	-2.8
Balears, Illes	109.3	6.8
Canarias	102.6	0.0
Cantabria	89.2	1.1
Castilla y León	87.9	1.5
Castilla - La Mancha	85.2	0.4
Cataluña	96.1	6.0
Comunitat Valenciana	94.4	5.4
Extremadura	86.3	0.7
Galicia	91.4	2.5
Madrid, Comunidad de	80.2	6.5
Murcia, Región de	79.7	3.6
Navarra, Comunidad Foral de	82.9	-0.8
País Vasco	92.9	4.9
Rioja, La	86.1	1.3
Ceuta	103.8	-0.5
Melilla	100.2	-0.1

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	95.4	4.2
HOTELS: Gold stars		
Five	92.6	3.4
Fourth	92.8	3.5
Three	101.4	7.0
Two	89.9	0.8
One	102.4	2.8
HOSTALS: Silver stars		
Three and two	92.7	4.3
One	97.0	0.8

Indicators on the Profitability of the Hotel Sector

May 2015

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	71.2	5.7	42.5	11.4
Andalucía	72.1	2.7	42.6	8.3
Aragón	51.7	3.3	18.9	7.8
Asturias, Principado de	49.6	-3.3	15.8	-6.6
Balears, Illes	65.8	8.4	43.3	14.3
Canarias	76.9	3.0	54.9	6.5
Cantabria	55.8	3.3	21.0	11.5
Castilla y León	54.6	4.9	22.5	18.3
Castilla - La Mancha	54.5	0.1	18.1	0.1
Cataluña	84.6	9.0	51.4	13.2
Comunitat Valenciana	58.0	5.6	35.7	10.8
Extremadura	55.1	4.7	19.7	0.1
Galicia	52.4	4.4	18.8	11.6
Madrid, Comunidad de	82.0	7.2	62.7	18.4
Murcia, Región de	53.1	4.6	26.6	12.9
Navarra, Comunidad Foral de	59.7	1.2	31.2	8.1
País Vasco	75.2	4.6	47.5	11.9
Rioja, La	60.4	0.2	35.6	5.2
Ceuta	73.5	3.2	36.9	-1.0
Melilla	64.6	2.6	42.5	-2.5

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	71.2	5.7	42.5	11.4
HOTELS: Gold stars				
Five	168.4	7.8	115.4	11.9
Four	76.5	4.0	52.9	8.1
Three	55.5	7.3	33.9	11.9
Two	48.9	2.3	21.3	9.5
One	53.6	12.6	20.0	20.8
GUESTHOUSES: Silver stars				
Three and two	48.1	12.6	17.6	22.0
One	37.5	5.1	13.2	27.8

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