

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
May 2017. *Provisional data*

Overnight stays in hotel establishments increase 3.8% in May as compared with the same month in 2016

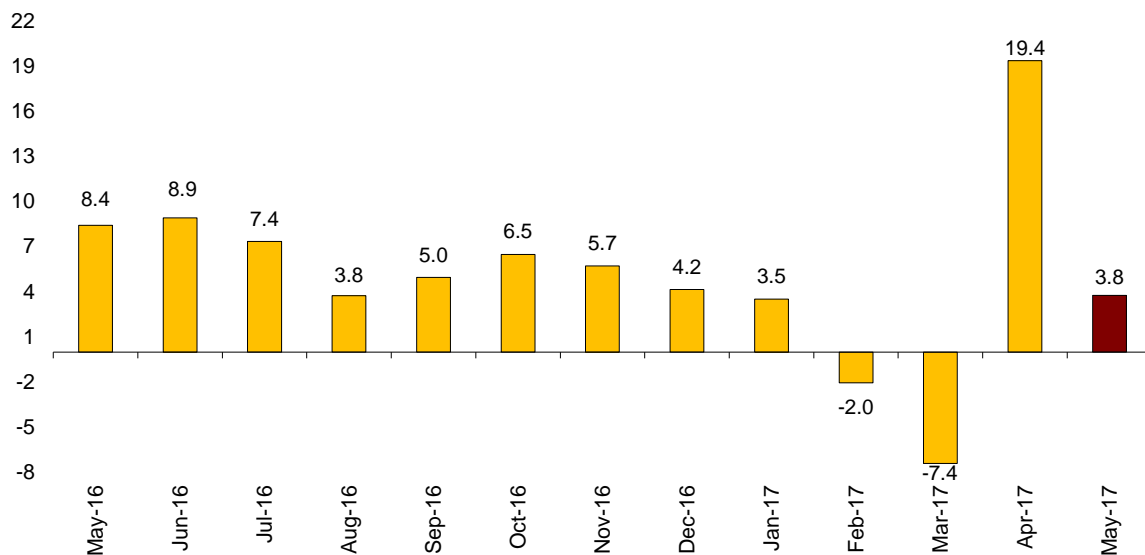
Hotels invoice an average of 79.9 euros per occupied room, which means an annual increase of 8.0%

During the month of May, a total of 31.5 million overnight stays were registered in hotel establishments, 3.8% more than in the same month of 2016. Overnight stays by travellers resident in Spain increased by 0.6% and those of non-residents did so by 5.1%.

The average stay increased 0.9% as compared with May 2016, standing at 3.2 overnight stays per traveller.

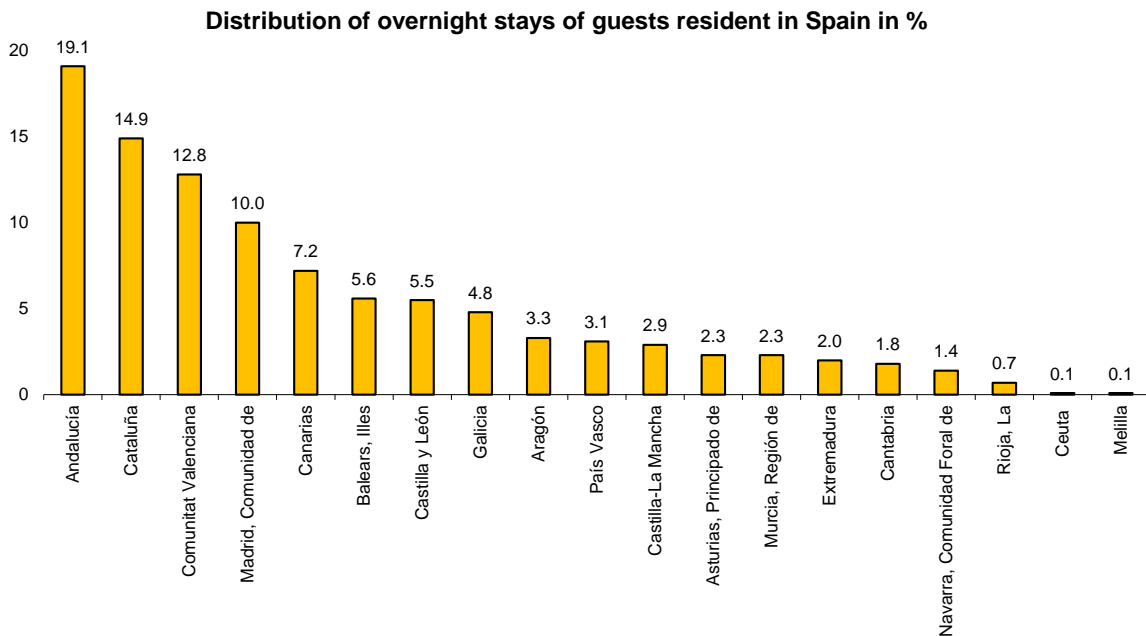
During the first five months of 2017, overnight stays increased by 3.9% as compared with the same period of the previous year.

Annual rates of overnight stays in %

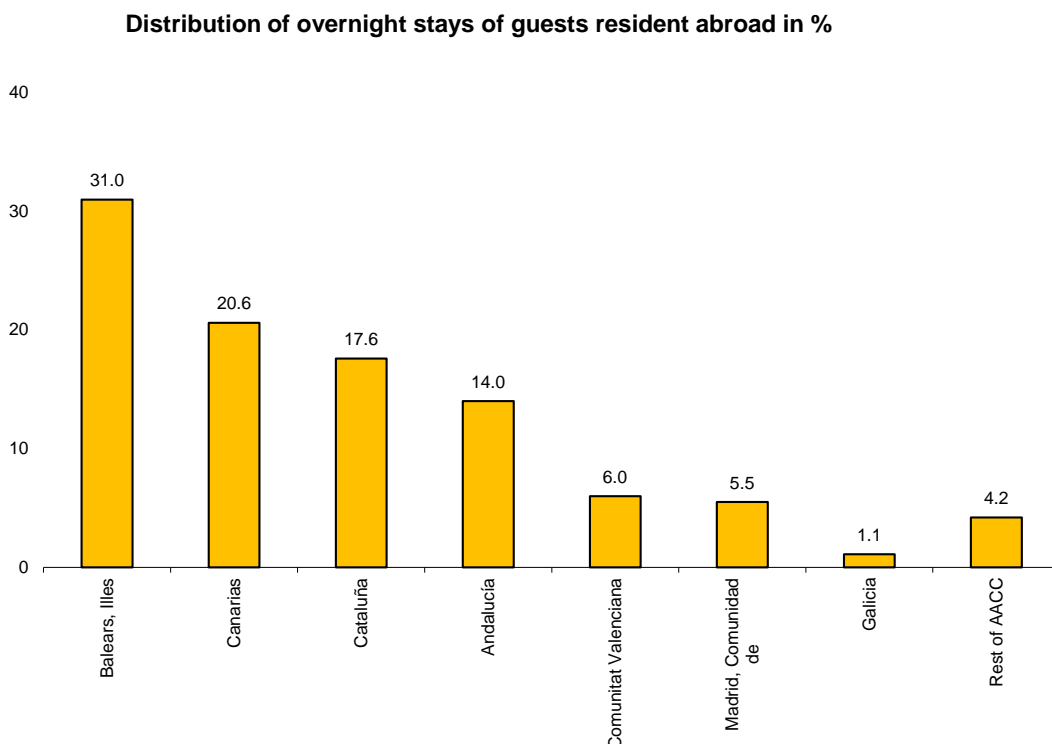


Destinations

Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of travellers resident in Spain in May, with annual variation rates in the number of overnight stays of -7.1%, -1.8%, -2.4% and 4.7%, respectively.



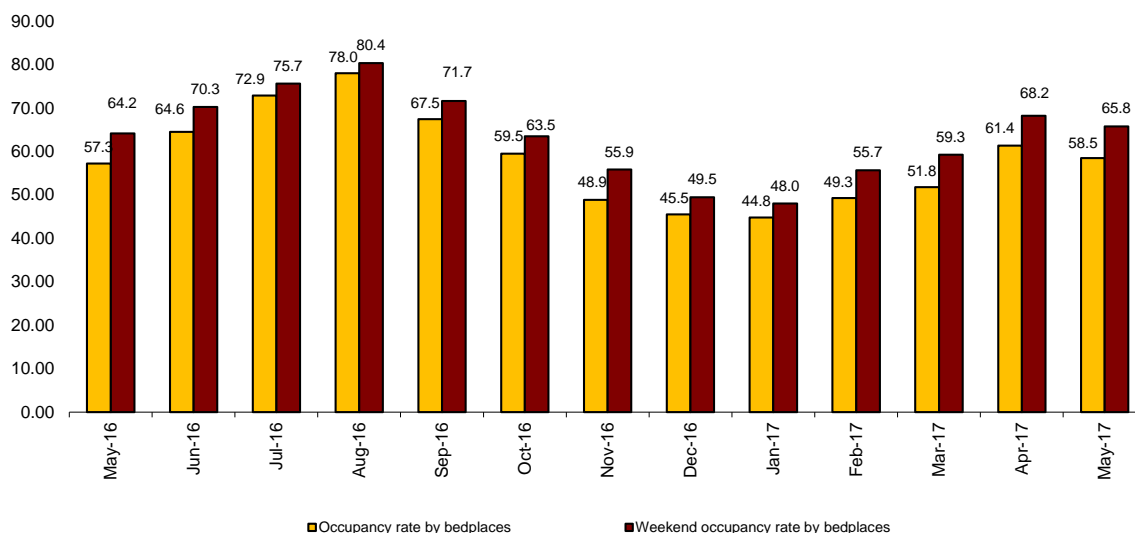
The main destination chosen by non-residents was Illes Balears, with 31.0% of total overnight stays. In this Autonomous Community, overnight stays of foreigners increased by 4.4% as compared to May 2016. The following destinations of non-residents were Canarias (with 20.6% of the total overnight stays and an increase of 2.6%) and Cataluña (with 17.6% of the total and an increase of 5.6%).



Hotel occupancy

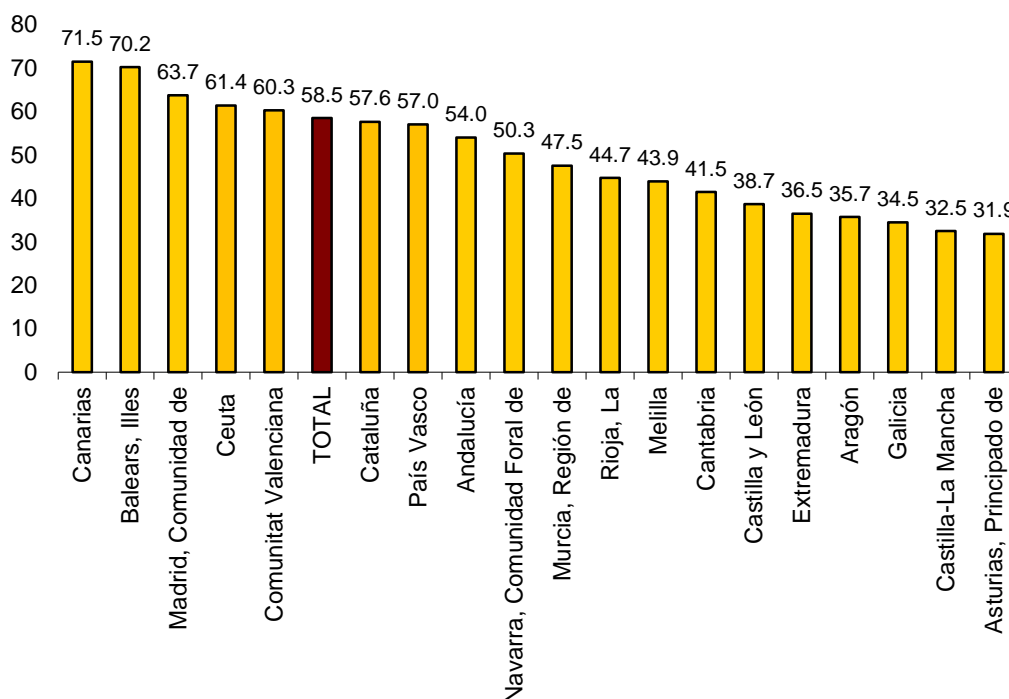
In May, 58.5% of the available bedplaces were occupied, indicating an annual increase of 2.2%. The weekend occupancy rate by bedplaces increased by 2.5%, standing at 65.8%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias showed the highest occupancy rate by bedplaces in May (71.5%). It is followed by Illes Balears (70.2%) and Comunidad de Madrid (63.7%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, the tourist area of Barcelona reached both the greatest level of occupancy by bedplaces (76.1%), and the greatest weekend occupancy rate (81.9%). La Costa del Sol registered the highest number of overnight stays, with 1.8 million.

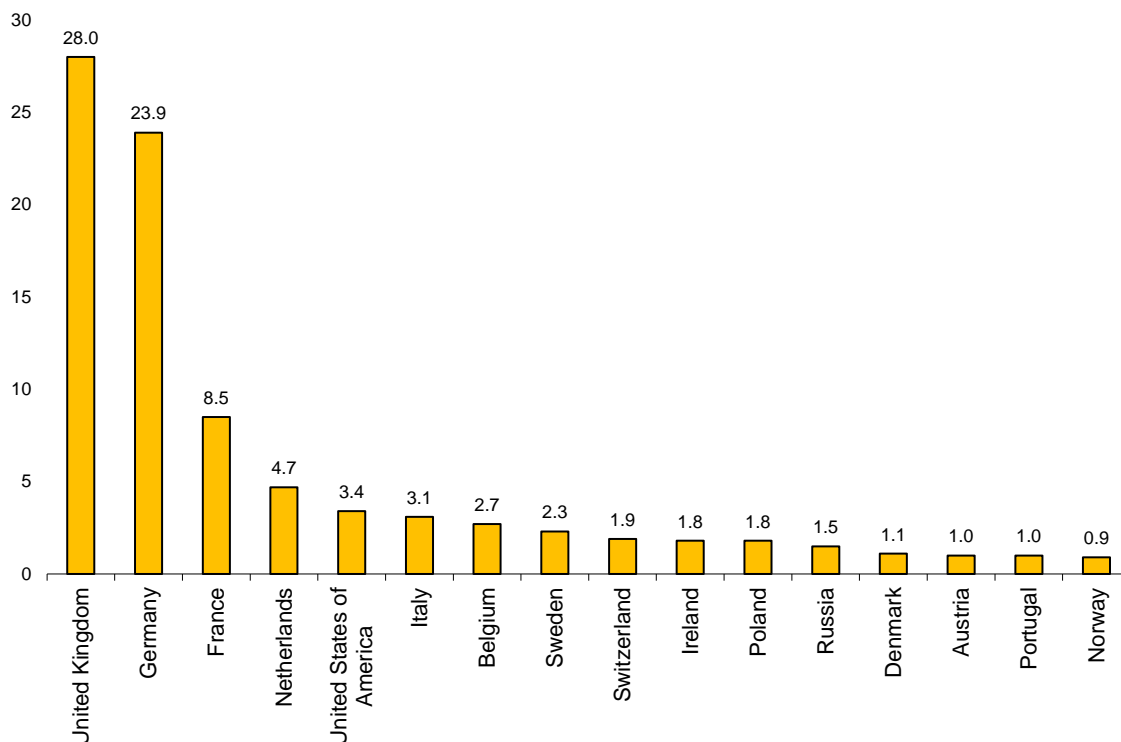
The tourist spots with more overnight stays were Madrid, Calvià and Palma. Muro reached the highest occupancy rate by bedplaces (79.2%) and Benidorm the greatest weekend occupancy rate (85.3%).

Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany concentrated 28.0% and 23.9%, respectively, of total overnight stays of non-residents in hotel establishments in May. The British market increased by 5.8%, and the German one did so by 0.5%.

Overnight stays of travellers from France, the Netherlands and the United States (the following countries of origin) registered annual rates of -2.4%, 6.4% and 18.0%, respectively.

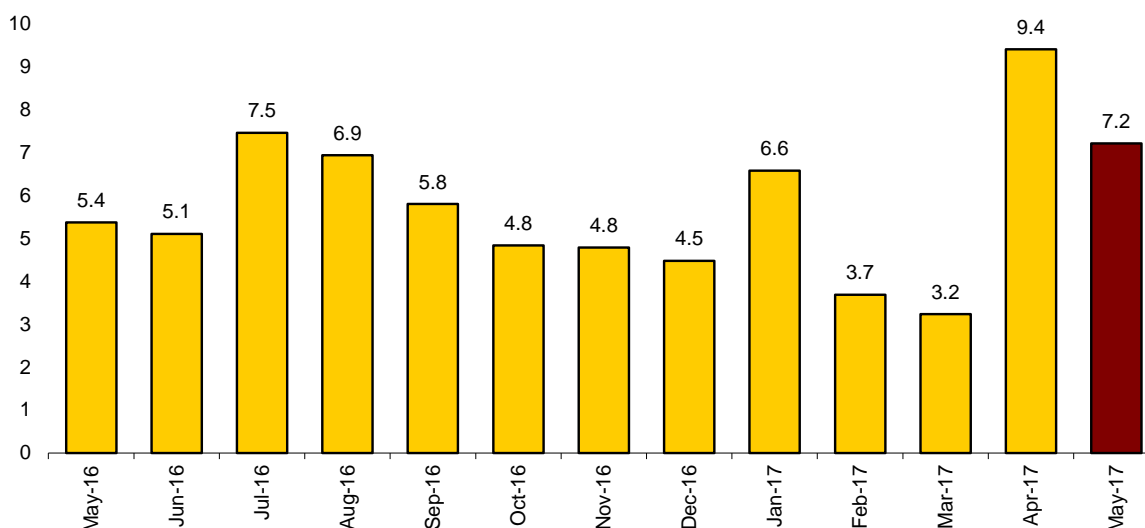
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 7.2% in May, which is 2.2 points lower than that registered last month and 1.8 points higher than that registered one year ago.

Hotel Prices Index. Annual variation rate



Illes Balears, Cataluña, Andalucía and Canarias were the most heavily weighted Autonomous Communities in the HPI in May (accounting for 72.5% of the total weight). Hotel prices increased by 8.6% in the annual rate in Canarias, 8.5% in Illes Balears, 8.4% in Andalucía and 7,3% in Cataluña.

By hotel category, hotel prices increased in all of them. In three-golden-star establishments (9.7%), three and two-silver-star establishments (8.2%), four-golden-star establishments (7.1%), one-golden-star establishments (5.7%), five-golden-star establishments (4.7%), two-golden-star establishment (4.2%) and one-silver-star establishment (3.8%).

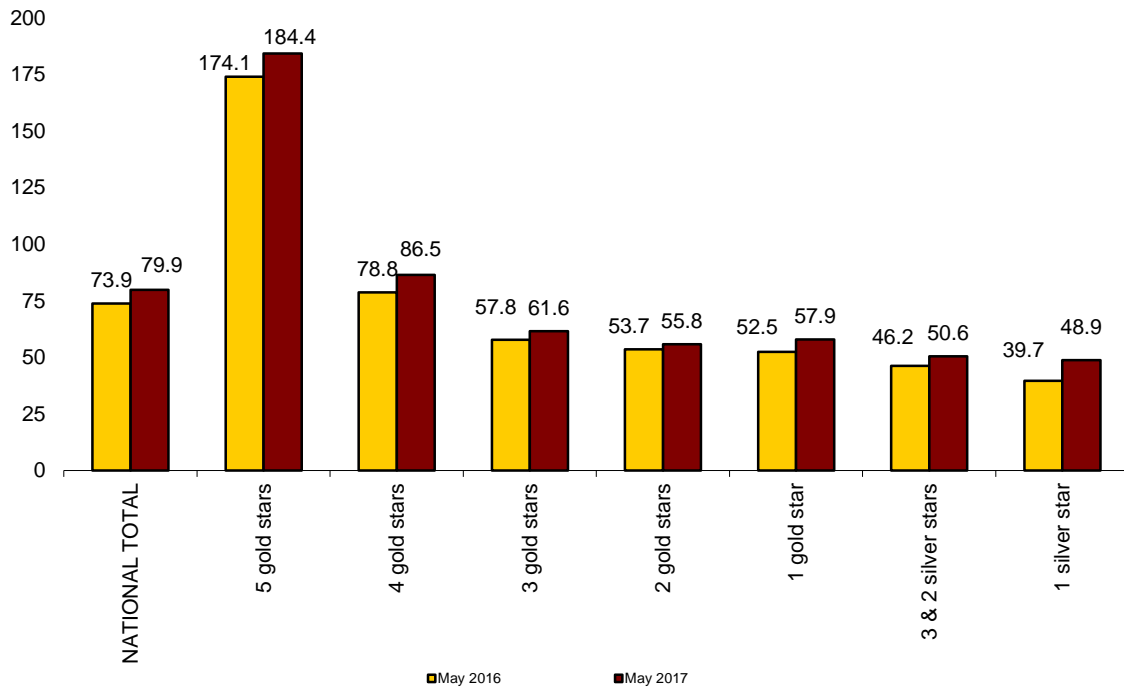
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 79.9 euros in May, which means an increase of 8.0% as compared with the same month of 2016.

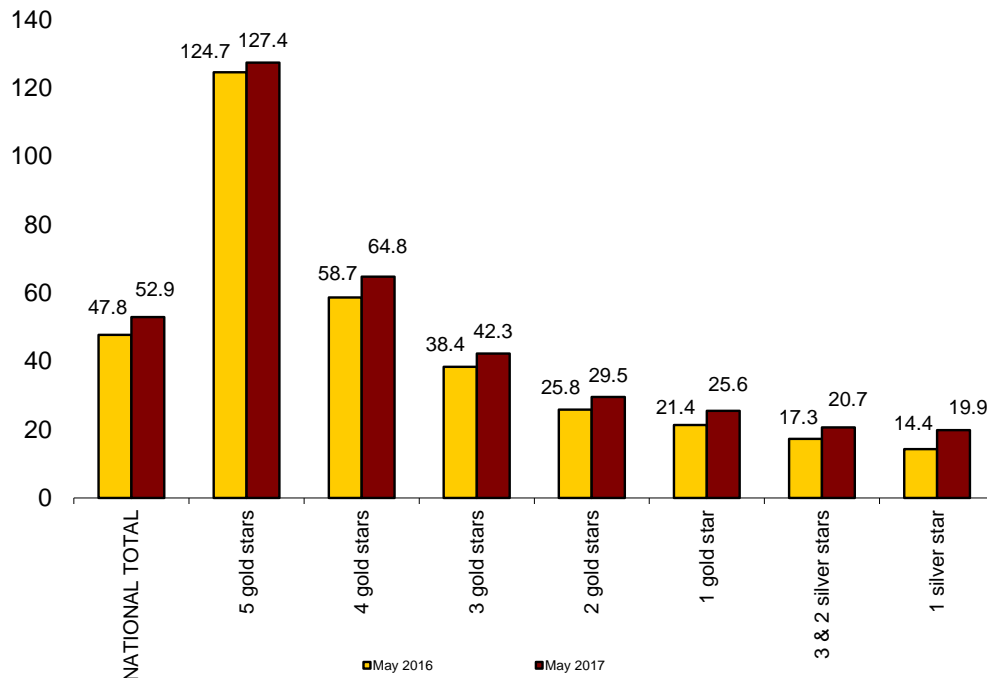
Meanwhile, the average daily income per room available (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 52.9 euros, with an increase of 10.8%.

By category, the average invoicing is 184.4 euros for five-star hotels, 86.5 euros for four-star hotels and 61.6 euros for three-star hotels. Income per available room for these same categories are 127.4, 64.8 and 42.3 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 2017

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	9,840,760	4,171,327	5,669,434	31,546,445	9,051,738	22,494,707	3.21
HOTELS: Golden stars							
Five	533,604	143,075	390,530	1,819,289	291,901	1,527,388	3.41
Four	4,642,486	1,824,601	2,817,885	15,861,597	3,997,521	11,864,076	3.42
Three	2,713,963	1,109,538	1,604,425	9,580,086	2,686,246	6,893,840	3.53
Two	731,582	417,515	314,067	1,759,362	785,498	973,863	2.40
One	289,350	167,755	121,595	581,064	296,118	284,946	2.01
INNS: Silver stars							
Two and three	495,171	290,510	204,661	992,288	525,913	466,375	2.00
One	434,603	218,333	216,270	952,760	468,541	484,219	2.19
Annual rate	2.83	-0.61	5.52	3.77	0.58	5.11	0.91
Cumulative annual rate	5.02	2.38	7.82	3.90	0.78	5.66	-1.07

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	15,855	822,002	1,711,596	58.49	65.81	66.08	237,608
HOTELS: Golden stars							
Five	303	46,079	96,360	60.11	66.74	69.28	32,355
Four	2,478	359,502	774,618	65.02	71.55	75.12	116,460
Three	2,793	232,000	487,144	62.08	69.64	67.95	59,637
Two	2,011	63,206	123,898	45.28	55.26	51.92	11,250
One	1,219	26,264	51,200	36.26	45.61	43.84	4,340
INNS: Silver stars							
Two and three	3,098	47,617	90,851	34.99	43.85	40.72	6,937
One	3,954	47,334	87,525	34.99	42.15	41.99	6,628
Annual rate	0.13	1.37	1.61	2.16	2.50	1.75	6.22

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	131,890	629,450	242,379	1,705,267	76.11	81.94	89.37	2.56	14,445
Sur de Gran Canaria	32,566	132,654	131,066	1,128,144	75.13	77.43	83.49	7.62	10,307
Sur de Tenerife	32,027	174,375	136,593	1,347,087	74.56	77.80	79.66	7.19	13,870
Isla de Lanzarote	14,547	99,656	69,743	781,171	73.64	75.47	83.16	7.45	6,506
Isla de Gran Canaria	55,397	145,207	187,583	1,184,394	72.87	75.76	81.50	6.84	11,341
Isla de Mallorca	84,861	899,623	285,141	5,386,530	72.19	74.86	76.57	5.76	37,238
Isla de Tenerife	73,375	203,581	304,309	1,570,530	72.05	75.20	77.20	6.77	17,218
Palma - Calvià	48,606	373,369	143,392	2,005,748	71.90	76.76	77.83	5.09	15,078

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

Costa del Sol	131,961	354,325	309,398	1,527,380	66.71	72.02	78.63	3.78	13,358
Costa Blanca	167,519	200,019	585,947	958,529	71.82	79.74	76.49	4.20	9,480
Islas de Ibiza-Formentera	43,460	215,899	125,019	1,088,869	66.24	69.39	69.93	4.68	9,196
Costa Barcelona	150,023	255,238	333,479	799,246	63.47	71.32	71.75	2.80	6,702
Isla de Fuerteventura	14,384	123,406	65,315	1,014,201	69.03	69.62	78.53	7.83	8,474
Costa Brava	126,349	215,955	308,535	716,343	48.03	61.97	53.22	2.99	7,804
Costa Daurada	132,826	161,658	292,926	698,010	51.03	65.96	58.30	3.36	5,376
Costa de la Luz de Cádiz	116,427	91,848	265,564	361,991	50.69	63.91	61.50	3.01	5,635

Tourist site with a greater occupancy rate per month

Muro	3,001	55,097	12,727	404,159	79.21	76.10	85.02	7.18	2,364
Benidorm	71,535	112,422	377,684	663,944	79.20	85.30	82.11	5.66	5,650
Pollença	1,109	21,902	2,294	137,958	79.17	79.25	82.65	6.09	1,168
San Bartolomé de Tirajana	24,743	103,285	97,784	892,432	78.34	81.19	85.67	7.73	8,525
Arona	5,703	56,231	30,603	429,243	77.30	79.18	82.27	7.42	3,203
Barcelona	118,021	601,509	216,464	1,636,266	76.65	82.43	89.63	2.57	13,678
Torremolinos	27,620	74,840	66,019	393,971	76.19	79.90	83.21	4.49	2,660
Alcúdia	2,559	69,370	15,695	469,191	75.91	72.90	76.89	6.74	2,648
Tías	2,681	29,920	11,801	227,298	75.83	77.84	85.63	7.33	1,561
Adeje	16,896	88,510	68,069	700,086	75.45	80.47	79.87	7.29	7,800

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

Madrid	362,951	488,864	612,676	1,125,375	66.09	73.93	81.39	2.04	12,431
Calvià	17,154	177,424	60,262	1,038,659	70.35	73.47	76.89	5.65	7,486
Palma	28,547	195,018	77,990	888,528	72.68	80.53	77.18	4.32	6,682
Pájara	5,681	74,868	29,456	637,860	72.24	71.89	79.24	8.28	5,182
Salou	56,529	102,485	141,497	493,998	58.95	75.17	63.41	4.00	2,664
Sant Llorenç des Cardassar	1,054	67,803	14,512	484,665	70.19	75.73	76.59	7.25	3,693
Sevilla	88,618	156,651	164,483	332,567	73.54	79.28	83.46	2.03	3,634
Lloret de Mar	30,177	74,946	119,342	326,360	56.69	67.02	59.52	4.24	2,341
Yaiza	4,858	47,854	28,471	372,955	73.79	75.53	82.28	7.62	3,409
Valencia	78,660	95,303	133,053	245,917	64.48	75.48	77.87	2.18	2,190

* 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	9,840,760	100.00	31,546,445	100.00
Residents in Spain	4,171,327	42.39	9,051,738	28.69
Residents abroad	5,669,434	57.61	22,494,707	71.31
Total Residents abroad	5,669,434	100.00	22,494,707	100.00
Total Residents in E.U. (without Spain)	4,065,670	71.71	18,535,648	82.40
- Germany	929,858	16.40	5,374,525	23.89
- Austria	58,647	1.03	227,389	1.01
- Belgium	135,484	2.39	597,740	2.66
- Denmark	55,111	0.97	238,490	1.06
- Finland	30,646	0.54	108,595	0.48
- France	639,688	11.28	1,907,261	8.48
- Greece	10,817	0.19	27,284	0.12
- Ireland	93,361	1.65	403,703	1.79
- Italy	260,287	4.59	695,716	3.09
- Luxembourg	8,672	0.15	46,224	0.21
- Netherlands	233,792	4.12	1,061,471	4.72
- Poland	80,934	1.43	402,289	1.79
- Portugal	101,643	1.79	219,949	0.98
- United Kingdom	1,186,780	20.93	6,294,881	27.98
- Czech Republic	23,338	0.41	83,822	0.37
- Sweden	110,167	1.94	510,611	2.27
- Other EU countries*	106,444	1.88	335,697	1.49
Norway	45,963	0.81	208,277	0.93
Russia	81,796	1.44	327,532	1.46
Switzerland	104,883	1.85	419,785	1.87
Rest of Europe	96,912	1.71	290,988	1.29
Japan	55,254	0.97	99,277	0.44
United States of America	336,440	5.93	756,117	3.36
Rest of America	365,542	6.45	838,176	3.73
Africa	57,304	1.01	128,621	0.57
Other countries	459,668	8.11	890,285	3.96

*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 2017

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	107.7	7.2
Andalucía	105.7	8.4
Aragón	77.2	0.6
Asturias, Principado de	88.4	2.6
Balears, Illes	127.3	8.5
Canarias	119.6	8.6
Cantabria	93.5	2.5
Castilla y León	90.9	3.2
Castilla - La Mancha	86.6	1.9
Cataluña	106.9	7.3
Comunitat Valenciana	105.8	5.0
Extremadura	87.6	0.9
Galicia	94.8	2.2
Madrid, Comunidad de	89.2	6.6
Murcia, Región de	85.8	4.5
Navarra, Comunidad Foral de	86.2	3.9
País Vasco	101.7	5.8
Rioja, La	87.5	-2.0
Ceuta	93.8	-1.3
Melilla	97.7	-3.0

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	107.7	7.2
HOTELS: Gold stars		
Five	102.3	4.7
Fourth	105.5	7.1
Three	115.6	9.7
Two	98.1	4.2
One	110.3	5.7
HOSTALS: Silver stars		
Three and two	103.0	8.2
One	104.2	3.8

Indicators on the Profitability of the Hotel Sector

May 2017

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	79.9	8.0	52.9	10.8
Andalucía	81.6	10.9	52.3	12.8
Aragón	52.1	0.4	22.6	5.1
Asturias, Principado de	52.7	-0.4	20.2	3.2
Balears, Illes	75.9	4.7	56.6	7.3
Canarias	87.0	9.5	69.2	8.2
Cantabria	55.9	-1.1	25.3	7.3
Castilla y León	55.4	3.5	24.7	9.3
Castilla - La Mancha	54.1	3.2	20.5	8.8
Cataluña	94.7	11.6	64.7	15.4
Comunitat Valenciana	64.4	4.0	42.7	5.6
Extremadura	54.9	0.4	22.8	8.1
Galicia	55.2	4.8	22.2	10.8
Madrid, Comunidad de	94.3	9.9	73.4	13.0
Murcia, Región de	55.5	1.1	31.3	-1.0
Navarra, Comunidad Foral de	61.8	4.7	38.4	19.5
País Vasco	82.5	2.3	59.0	7.0
Rioja, La	61.2	-2.1	34.4	-2.3
Ceuta	70.3	1.4	45.8	14.1
Melilla	66.2	-0.3	39.0	-20.5

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	79.9	8.0	52.9	10.8
HOTELS: Gold stars				
Five	184.4	5.9	127.4	2.2
Four	86.5	9.8	64.8	10.4
Three	61.6	6.6	42.3	10.1
Two	55.8	4.0	29.5	14.3
One	57.9	10.3	25.6	19.4
GUESTHOUSES: Silver stars				
Three and two	50.6	9.4	20.7	19.5
One	48.9	22.9	19.9	38.5

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room