

23 July 2013  
(Update 11:00)

**Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)**  
June 2013. *Provisional data*

**Overnight stays in hotel establishments increase 1.7% in June, as compared with the same month in 2012**

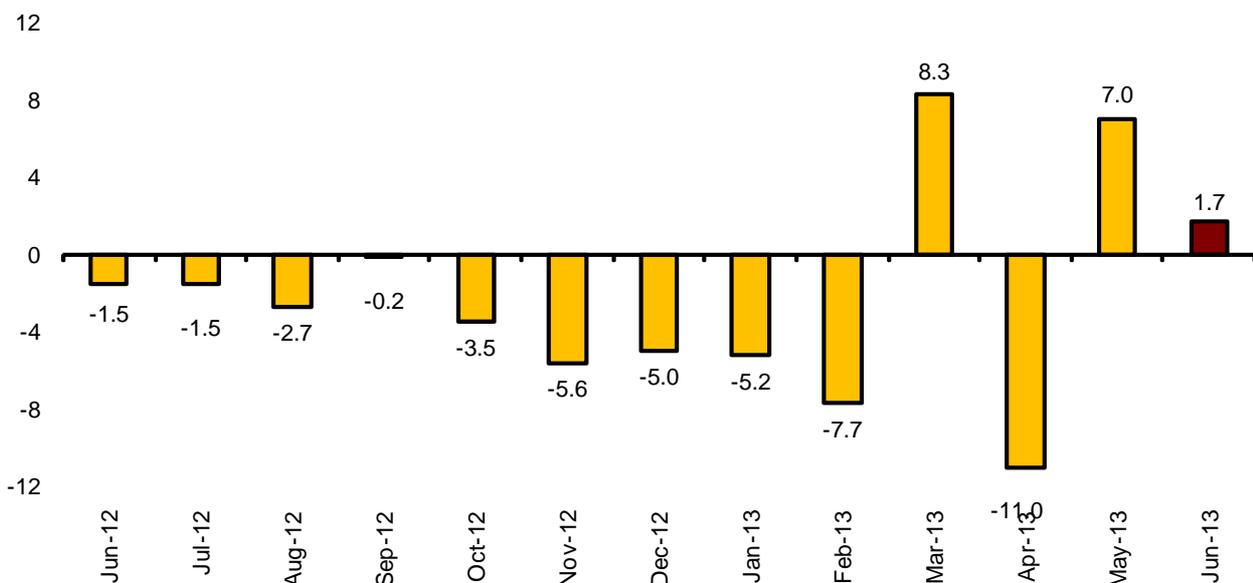
**Hotels earn 43.0 euros per available room and invoice an average of 69.2 euros per occupied room**

During the month of June, 30.8 million overnight stays were recorded in hotel establishments, indicating a 1.7% increase as compared with the same month in 2012. Overnight stays for residents in Spain decreased by 3.5%, as well as for non-residents that did so by 4.2%.

The average stay increased 0.2%, as compared with June 2012, standing at 3.5 nights per guest.

During the first six-month period of 2013, overnight stays decreased 0.4% as compared with the same month of the previous year.

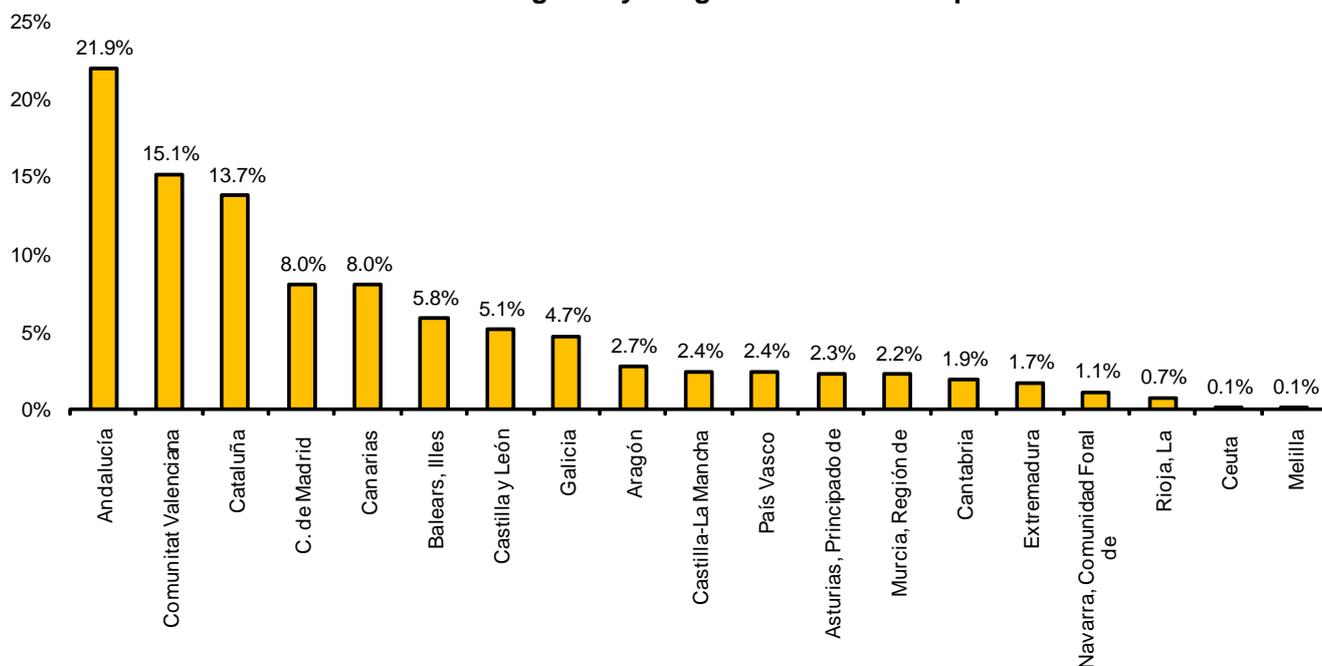
**Interannual rates of overnight stays in %**



**Main destinations**

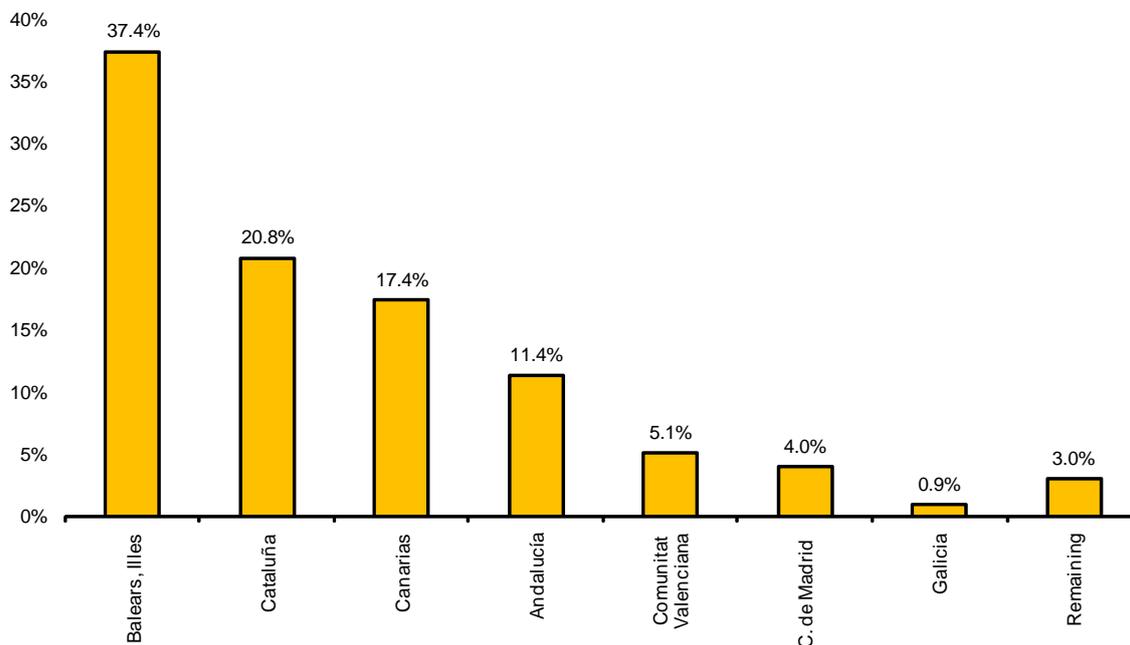
In June, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with interannual rates for overnight stays of 1.6%, -2.3%, -5.7% and -6.4%, respectively.

**Distribution of overnight stays of guests resident in Spain in %**



The main destination chosen by non-residents was Illes Balears. In this Autonomous Community, overnight stays by foreign nationals increased by 0.5%, as compared with the same month of 2012. Followed by Cataluña, with an annual rate of 6.7%, and Canarias, with an increase of 5.9%.

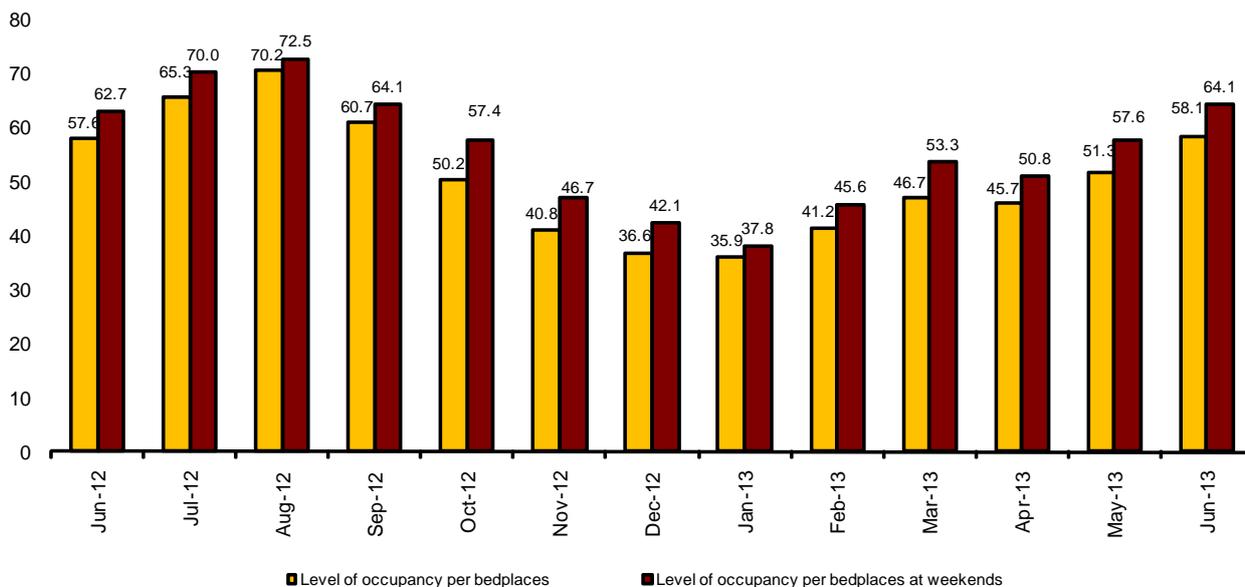
**Distribution of overnight stays of guests resident abroad in %**



### Hotel Occupancy

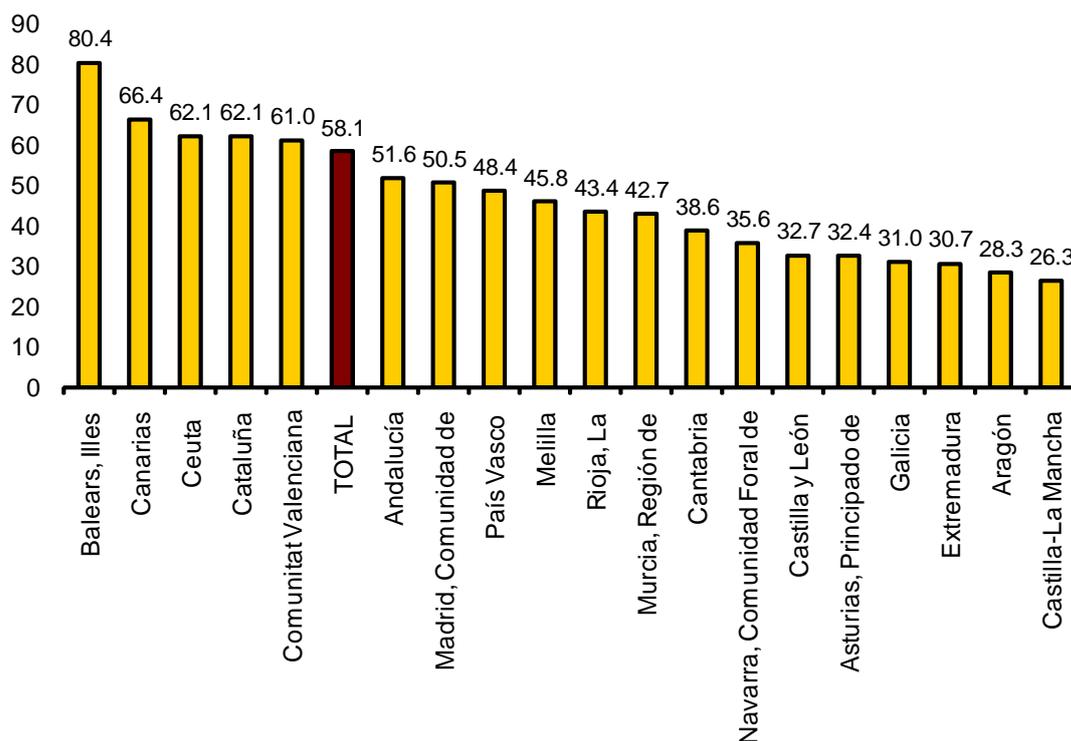
In terms of occupancy, 58.1% of the available bedplaces were occupied in June, with an annual increase of 0.9%. The weekend occupancy rate by bedplaces increased 2.2% and stood at 64.1%.

Level of occupancy per bedplaces and per bedplaces at weekends



During the month of June, Illes Balears was the Autonomous Community with the highest occupancy rate by bedplaces (80.4%), followed by Canarias (66.4%) and Cataluña (62.1%).

Level of occupancy per bedplaces by Automous Communities



By tourist areas, Palma-Calvià presented both the highest occupancy rate by bedplaces in June (82.7%) and the highest weekend occupancy rate by bedplaces (87.2%). In the island of Mallorca over 6.4 million overnight stays were registered in June.

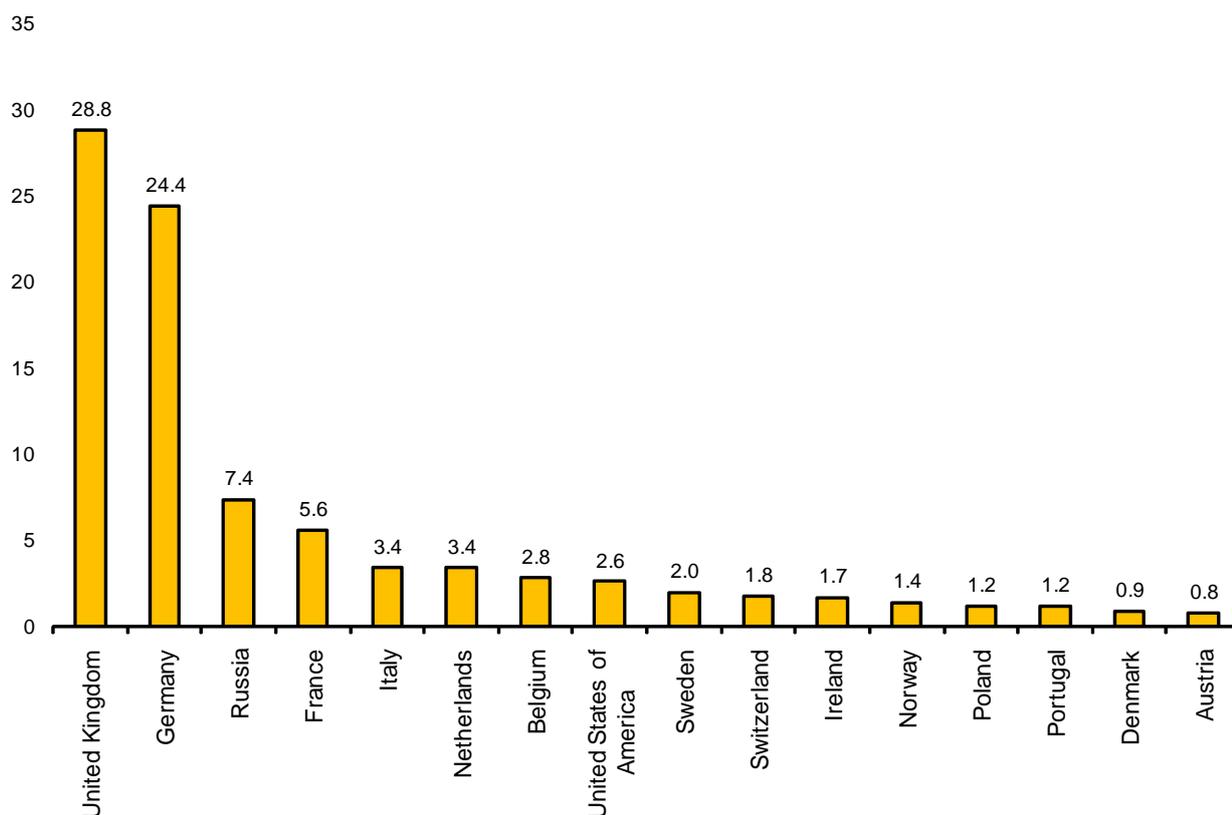
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Palma-Calvià. Santa Margalida also reached the highest occupancy rate by bedplaces (91.1%) and the highest weekend occupancy (94.2%).

### Overnight stays of guests resident abroad

Guests from the United Kingdom and Germany registered 28.8% and 24.4%, respectively, of the total of overnight stays by non-residents in June. The British market experienced a 3.9% annual increase, in turn, the German market decreased by 3.9%.

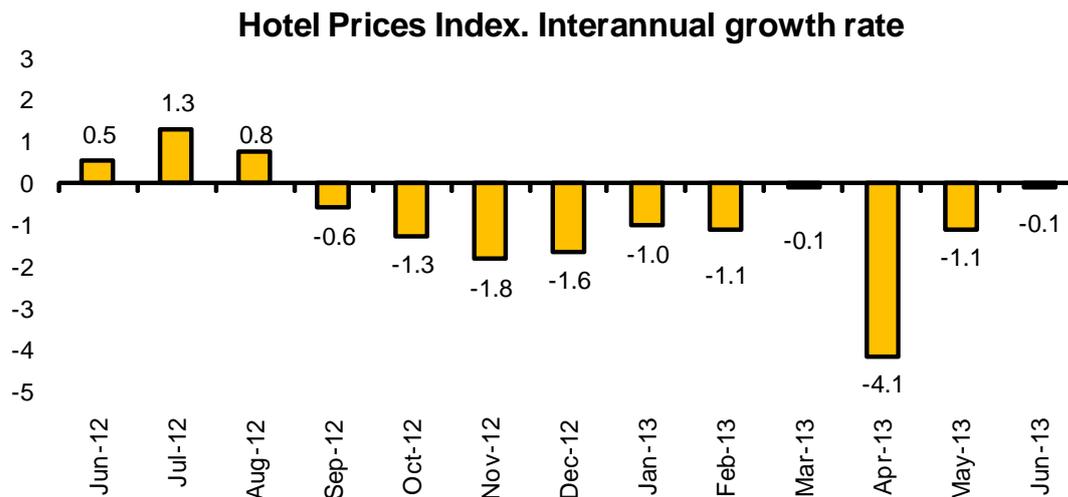
Overnight stays of guests from Russia, France and Italy (the following countries of origin) registered annual rates of 25.8%, 15.0% and -9.6%, respectively.

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



## Hotel Prices

The annual rate of the Hotel Prices Index (HPI) registered  $-0.1\%$  in June, 1.0 point more than that of the previous month, and 0.6 points less than that registered the previous year.



The four Autonomous Communities (Illes Balears, Cataluña, Andalucía and Canarias) that carried 72.9% of the total load of the HPI in the month of June, just Andalucía showed negative annual rates.

Illes Balears, which carried the greatest load in the weighting structure this month, presented an annual rate of 2.6%, 2.8 points lower than that estimated in May. Hotel prices experienced an increase of 1.3% in Cataluña, 3.8 points higher as compared with the previous month. Andalucía registered a rate of  $-3.5\%$ , as compared with the  $-2.8\%$  registered in the previous month. In Canarias, the variation in prices is of 2.5%, 1.6 points higher as compared with May.

The greatest decreases in hotel prices by hotel category were registered in two-golden-star hotels (with a  $-4.5\%$  rate), in three and two-silver-star hotels ( $-2.5\%$ ).

Four-gold-star establishments ( $-0.4\%$ ) and five-gold-star establishments ( $-0.1\%$ ) registered negative annual rates. One and three-golden-star hotels registered a positive evolution, 0.5% and 1.3%, respectively.

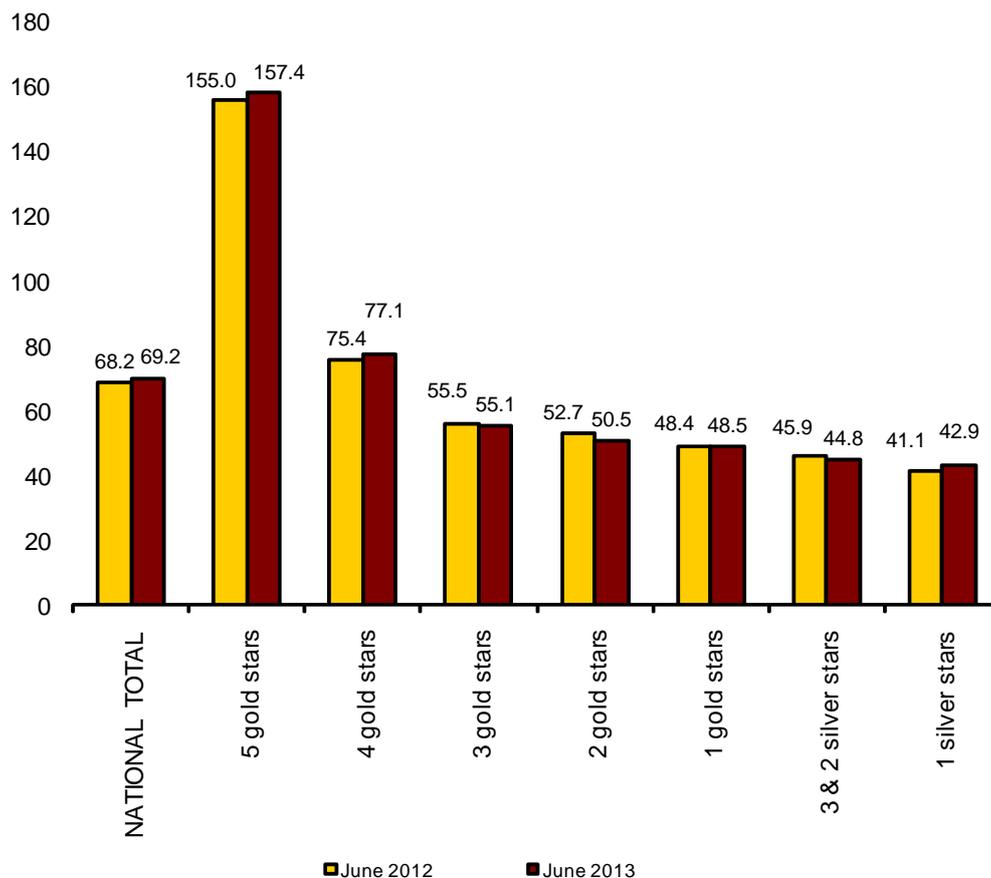
### Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in June was 69.2 euros, an increase of 1.4%, as compared with the same month in 2012.

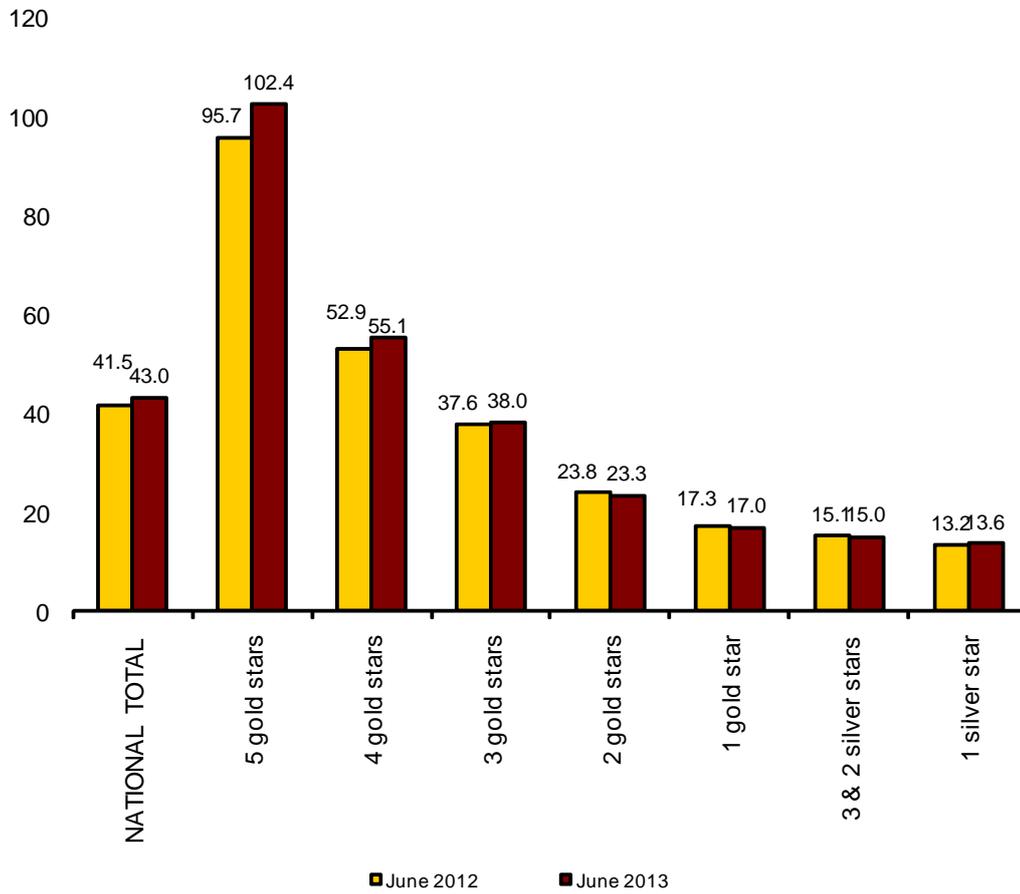
In turn, the average daily income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 43.0 euros, with an increase of 3.6% as compared with June 2012.

By category, the average invoicing was 157.4 euros for five-star hotels, 77.1 euros for four-star hotels and 55.1 euros for three-star hotels. Income per available room for the same categories was 102.4, 55.1 and 38.0 euros, respectively.

**Average daily rate (ADR)**



**Revenue per available room (RevPAR)**



## Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

June 2013

Provisional data

### 1. Travellers, overnight stays and average stay by categories of establishment

Category	Number of travellers			Number of overnight stays			Average stay
	Total	Residents in Spain	Residents abroad	Total	Residents in Spain	Residents abroad	
<b>TOTAL</b>	<b>8,713,947</b>	<b>4,115,889</b>	<b>4,598,058</b>	<b>30,763,617</b>	<b>9,337,579</b>	<b>21,426,038</b>	<b>3.53</b>
HOTELS: Golden stars							
Five	438,831	149,911	288,921	1,465,822	311,264	1,154,558	3.34
Four	3,856,637	1,789,362	2,067,275	14,089,568	4,129,234	9,960,334	3.65
Three	2,799,583	1,239,282	1,560,300	11,171,915	2,976,364	8,195,551	3.99
Two	669,410	397,671	271,738	1,798,022	839,730	958,292	2.69
One	219,336	131,137	88,199	505,314	251,612	253,702	2.30
INNS: Silver stars							
Two and three	380,989	227,724	153,265	957,722	441,360	516,362	2.51
One	349,161	180,801	168,360	775,253	388,015	387,239	2.22
Interannual rate	1.47	-1.16	3.95	1.72	-3.48	4.16	0.24
Cumulative interannual rate	-1.63	-5.64	2.97	-0.35	-6.55	3.44	1.31

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

Category	Estimated open establishments	Estimated bedplaces	Level of occupancy			Employed personnel
			Per bedplaces	Per bedplaces at weekend	Per rooms	
<b>TOTAL</b>	<b>16,190</b>	<b>1,714,109</b>	<b>58.14</b>	<b>64.13</b>	<b>62.11</b>	<b>219,079</b>
HOTELS: Golden stars						
Five	271	83,514	57.84	63.75	65.08	24,913
Four	2,263	703,196	65.10	71.38	71.47	101,093
Three	2,966	541,998	66.15	71.39	69.04	62,876
Two	2,059	136,260	42.62	50.94	46.10	11,657
One	1,277	53,584	31.25	37.58	35.27	4,295
INNS: Silver stars						
Two and three	3,186	103,459	30.66	36.59	33.63	7,959
One	4,168	92,098	27.63	32.24	31.00	6,286
Interannual rate	-1.15	0.73	0.93	2.20	2.14	-1.27

### 3. Travellers, overnight stays, occupancy, average stay and employed personnel

Results by areas and tourist sites

	Travellers		Overnight stays		Level of occupancy			Average stay	Employed personnel
	Residents in Spain	Residents abroad	Residents in Spain	Residents abroad	Per bedplac	Per bedplaces	Per rooms at weekend		

#### Tourist areas with a greater level of occupancy per month

Palma - Calvià	47,356	371,441	139,135	2,160,892	82.73	87.22	86.08	5.49	12,550
Isla de Mallorca	77,705	892,508	269,424	6,128,652	81.81	82.42	84.02	6.59	34,591
Islas de Ibiza-Formentera	42,205	233,513	153,682	1,359,258	78.15	82.41	81.19	5.49	8,073
Isla de Lanzarote	23,488	70,312	126,353	622,598	74.51	70.38	78.11	7.98	5,063
Costa Daurada	145,071	155,748	384,454	1,047,542	73.47	78.51	74.25	4.76	5,904
Sur de Tenerife	45,180	144,986	178,090	1,263,015	72.85	75.79	77.97	7.58	11,866
Isla de Menorca	26,570	68,726	121,010	516,631	72.34	72.77	78.67	6.69	3,533
Costa Blanca	198,738	152,392	728,362	786,472	72.32	80.95	74.15	4.31	8,428

#### Tourist areas with a greater number of overnight stays per month \*

Costa del Sol	190,142	261,847	525,738	1,292,307	68.64	77.86	75.19	4.02	11,995
Isla de Tenerife	83,553	163,350	340,787	1,404,570	68.45	71.40	73.15	7.07	14,886
Barcelona	126,002	513,596	231,059	1,339,770	70.77	76.75	81.41	2.46	12,732
Costa Brava	133,066	240,833	242,106	1,059,506	55.70	65.15	57.23	3.48	7,944
Isla de Gran Canaria	58,970	107,580	211,650	875,837	64.61	68.53	71.12	6.53	9,242
Sur de Gran Canaria	42,090	100,852	169,889	856,570	69.02	73.03	75.25	7.18	8,354
Isla de Fuerteventura	11,831	88,971	48,568	786,343	63.44	63.32	70.35	8.28	6,591
Costa de la Luz de Cádiz	141,657	64,931	340,743	303,888	54.16	64.02	59.94	3.12	5,244

#### Tourist sites with a greater level of occupancy per month

Santa Margalida	1,698	50,408	5,130	415,153	91.14	94.15	94.12	8.07	1,971
Son Servera	1,291	31,882	12,294	250,579	87.01	84.38	85.70	7.92	1,345
Muro	3,546	56,247	13,195	462,603	86.82	82.24	89.09	7.96	2,467
Alcúdia	2,675	66,474	8,701	494,280	86.58	86.40	89.90	7.27	3,106
Salou	47,085	106,227	158,259	758,512	85.87	88.42	85.44	5.98	3,170
Benidorm	92,189	91,983	500,514	570,036	84.35	90.85	86.81	5.81	5,209
Pollença	1,178	19,185	3,935	135,797	83.53	82.92	87.18	6.86	955
Torremolinos	40,833	65,238	161,813	398,131	83.42	88.64	87.31	5.28	2,718
Calvià	10,903	171,713	45,243	1,193,853	82.80	84.45	85.06	6.79	6,381
Sant Josep de Sa Talaia	5,604	62,264	20,506	354,607	81.92	76.63	77.13	5.53	2,171

#### Tourist sites with a greater number of overnight stays per month \*

Barcelona	116,145	493,130	211,902	1,291,494	71.64	77.59	82.11	2.47	12,283
Madrid	312,848	363,652	516,649	801,185	53.66	58.31	68.21	1.95	11,620
Palma	34,064	195,918	89,243	919,711	81.55	88.87	86.48	4.39	5,831
San Bartolomé de Tirajana	34,116	72,545	140,079	637,882	69.05	74.25	76.41	7.29	6,735
Adeje	20,475	77,636	84,908	680,816	73.22	76.16	79.41	7.80	6,503
Lloret de Mar	25,893	114,915	47,310	600,258	67.76	75.43	67.05	4.60	2,555
Pájara	5,746	61,178	26,555	549,598	65.02	66.15	71.82	8.61	4,760
Sant Llorenç des Cardassar	1,218	64,897	5,391	550,169	81.56	80.42	83.76	8.40	2,677
Manacor	1,417	51,531	9,303	454,010	76.30	68.69	76.89	8.75	2,165
Arona	11,962	45,501	52,995	392,625	78.35	80.72	84.10	7.75	3,095

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

## 4. Travellers, overnight stays and average stay by country of residence

### Results by countries

Countries	Number of travellers		Overnight stays	
	Total	%	Total	%
<b>TOTAL</b>	<b>8,713,947</b>	<b>100.00</b>	<b>30,763,617</b>	<b>100.00</b>
Residents in Spain	4,115,889	47.23	9,337,579	30.35
Residents abroad	4,598,058	52.77	21,426,038	69.65
Total Residents abroad	4,598,058	100.00	21,426,038	100.00
Total Residents in U.E. (without Spain)	3,249,703	70.68	16,843,456	78.61
- Germany	817,102	17.77	5,226,334	24.39
- Austria	38,356	0.83	171,363	0.80
- Belgium	113,279	2.46	591,760	2.76
- Denmark	40,448	0.88	189,001	0.88
- Finland	24,944	0.54	110,737	0.52
- France	401,945	8.74	1,191,079	5.56
- Greece	8,645	0.19	21,079	0.10
- Ireland	72,818	1.58	358,412	1.67
- Italy	212,745	4.63	736,349	3.44
- Luxembourg	7,615	0.17	46,067	0.22
- Netherlands	153,245	3.33	735,811	3.43
- Poland	52,533	1.14	264,708	1.24
- Portugal	105,612	2.30	264,209	1.23
- United Kingdom	1,028,879	22.38	6,168,913	28.79
- Czech Republic	21,187	0.46	103,728	0.48
- Sweden	82,001	1.78	424,665	1.98
- Rest of UE*	68,350	1.49	239,241	1.12
Norway	64,732	1.41	304,647	1.42
Russia	227,104	4.94	1,577,368	7.36
Switzerland	88,989	1.94	390,737	1.82
Rest of Europe	101,579	2.21	356,008	1.66
Japan	66,450	1.45	112,226	0.52
United States of America	257,288	5.60	552,191	2.58
Rest of America	244,609	5.32	560,827	2.62
African's countries	45,054	0.98	106,417	0.50
Rest of the world	252,548	5.49	622,163	2.90

\*Countries included in the Rest of UE: Bulgaria, Cyprus, Slovakia, Slovenia, Estonia, Hungary, Latvia, Lithuania, Malta and Romania

## Hotel Price Index (HPI). 2008 Base

June 2013

Provisional data

### National General Index and breakdown by Autonomous Cities and Communities

	Index	Interannual variation rate
<b>TOTAL</b>	<b>93.3</b>	<b>-0.1</b>
Andalucía	87.4	-3.5
Aragón	61.6	-3.9
Asturias, Principado de	86.0	-0.7
Balears, Illes	103.9	2.6
Canarias	101.3	2.5
Cantabria	89.9	-1.1
Castilla y León	85.8	-4.8
Castilla - La Mancha	83.8	-5.3
Cataluña	96.1	1.3
Comunitat Valenciana	90.8	-2.4
Extremadura	86.2	-4.0
Galicia	90.1	-4.1
Madrid, Comunidad de	77.8	-3.5
Murcia, Región de	74.6	-1.1
Navarra, Comunidad Foral de	82.7	-4.6
País Vasco	91.7	0.2
Rioja, La	80.7	-5.7
Ceuta	99.1	-5.7
Melilla	100.8	4.3

### National General Index and breakdown by categories

	Index	Interannual variation rate
<b>TOTAL</b>	<b>93.3</b>	<b>-0.1</b>
<b>HOTELS: Gold stars</b>		
Five	89.7	-0.1
Fourth	90.5	-0.4
Three	97.0	1.3
Two	95.0	-4.5
One	101.0	0.5
<b>HOSTALS: Silver stars</b>		
Three and two	94.4	-2.5
One	100.3	0.7

## Indicators on the Profitability of the Hotel Sector

June 2013

Provisional data

### National ADR and RevPAR<sup>(\*)</sup> and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Variation Rate variation	RevPar (in euros)	Variation Rate variation
<b>TOTAL</b>	<b>69.2</b>	<b>1.4</b>	<b>43.0</b>	<b>3.6</b>
Andalucía	70.3	-1.8	40.3	3.2
Aragón	50.3	-0.5	15.8	0.4
Asturias, Principado de	51.8	-1.8	17.9	-4.5
Balears, Illes	68.4	1.0	57.0	2.7
Canarias	71.4	7.8	51.1	11.2
Cantabria	59.3	-0.6	23.3	-8.7
Castilla y León	52.0	-4.2	18.4	-4.8
Castilla - La Mancha	51.8	-7.0	15.9	-0.4
Cataluña	77.3	4.0	51.1	6.1
Comunitat Valenciana	60.3	-2.8	38.2	0.6
Extremadura	52.4	-4.6	18.3	1.2
Galicia	50.5	-6.7	17.1	-7.8
Madrid, Comunidad de	79.5	-0.8	50.4	-1.4
Murcia, Región de	53.1	-0.2	23.0	1.7
Navarra, Comunidad Foral de	60.6	0.0	24.2	-2.5
País Vasco	73.4	3.0	41.6	-5.3
Rioja, La	58.4	-3.7	28.8	-0.9
Ceuta	69.7	-5.7	42.6	-5.4
Melilla	65.8	1.4	39.4	-8.3

### National ADR and RevPar<sup>(\*)</sup> and breakdown by categories

	ADR (in euros)	Variation Rate interannual	RevPar (in euros)	Variation Rate interannual
<b>TOTAL</b>	<b>69.2</b>	<b>1.4</b>	<b>43.0</b>	<b>3.6</b>
<b>HOTELS: Gold stars</b>				
Five	157.4	1.6	102.4	6.9
Four	77.1	2.2	55.1	4.1
Three	55.1	-0.7	38.0	1.1
Two	50.5	-4.1	23.3	-2.0
One	48.5	0.2	17.0	-2.2
<b>GUESTHOUSES: Silver stars</b>				
Three and two	44.8	-2.3	15.0	-0.9
One	42.9	4.4	13.6	2.7

(\*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room