

22 July 2016

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
June 2016. *Provisional data*

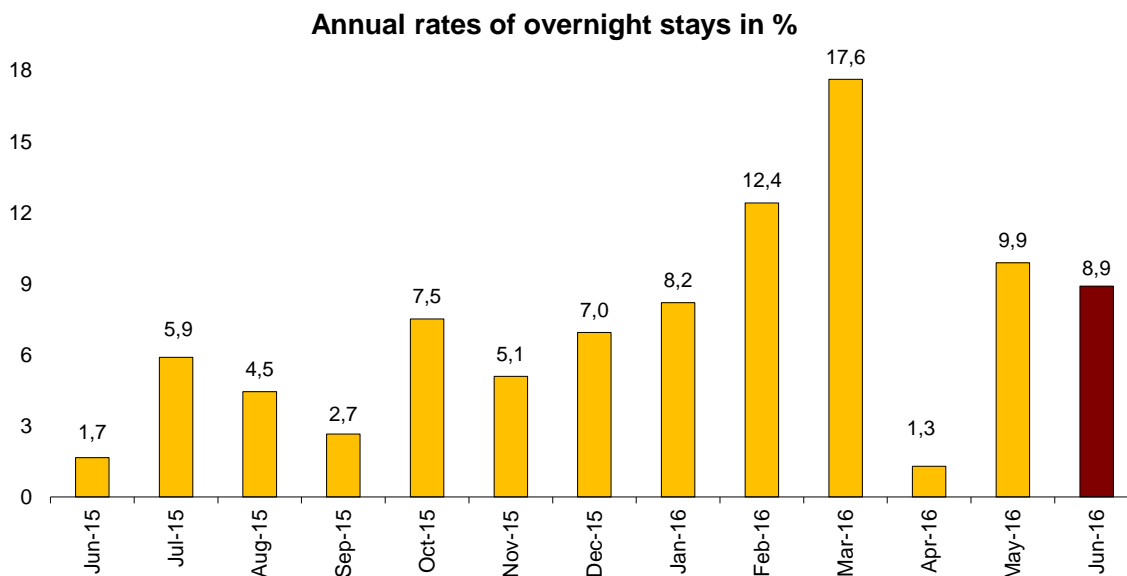
Overnight stays in hotel establishments register an increase of 8.9% in June, as compared to the same month of 2015

Hotels invoice an average of 79.5 euros per occupied room, which means an annual increase of 4.5%

In June, a total of 34.9 million overnight stays were registered in hotel establishments, 8.9% more than in the same month of 2015. Overnight stays by residents in Spain increased by 1.3% and those of non-residents increased so by 12.6%.

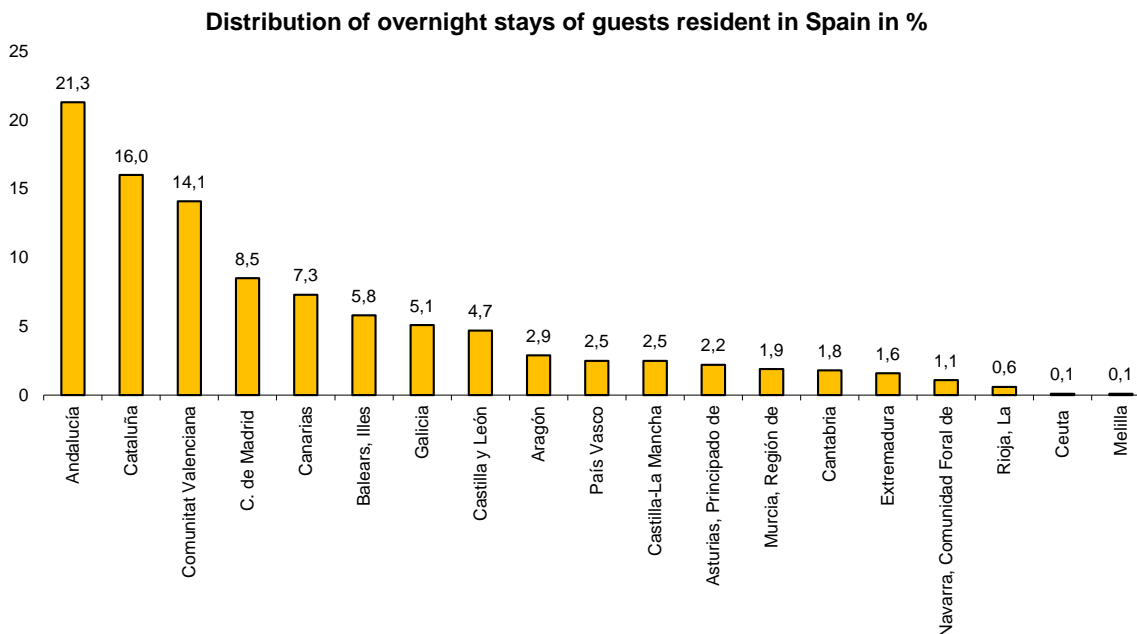
The average stay increased 2.2%, as compared to June 2015, standing at 3.5 nights per guest.

During the first six months of 2016, overnight stays increased 9.3%, as compared to the same period of the previous year.

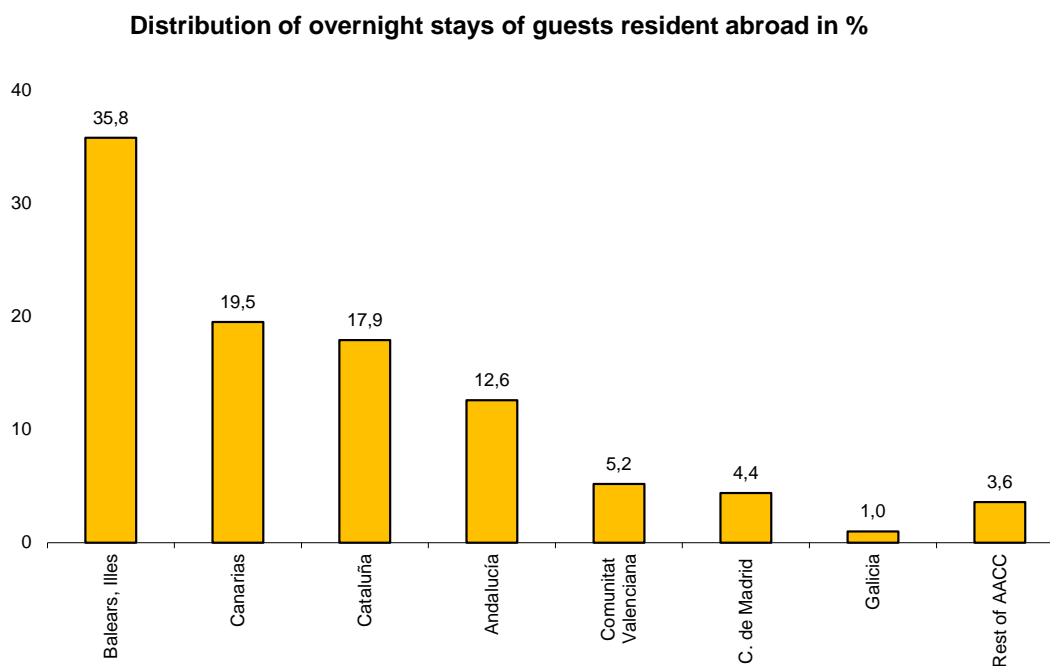


Main destinations

In June, 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 7.5%, 9.4%, 3.3% and 4.2%, respectively.

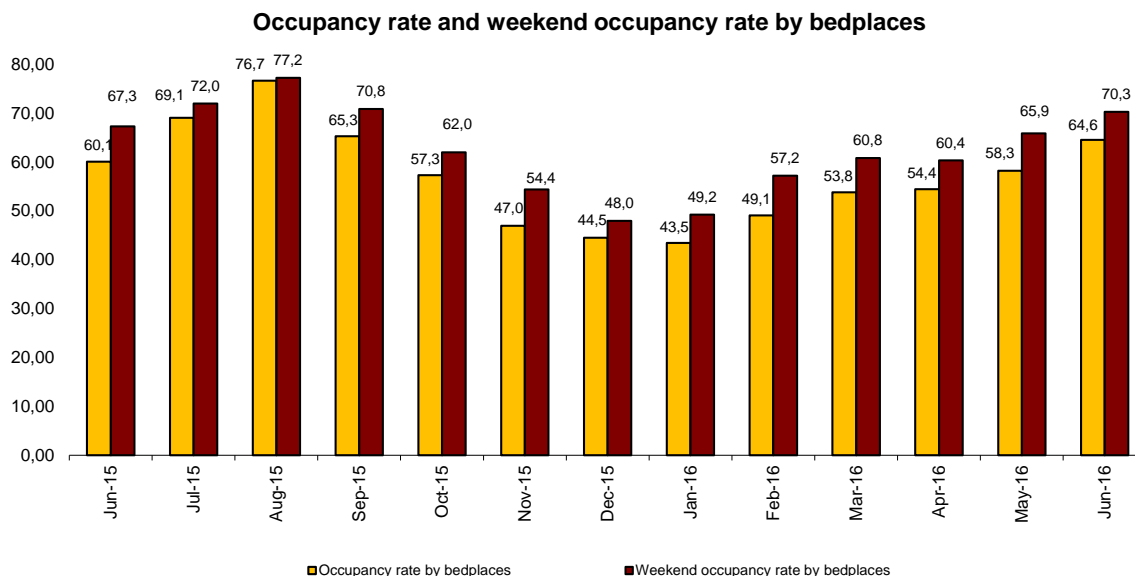


The main destination chosen by non-residents was Illes Balears, with 35.8% of the total amount of overnight stays. In this Autonomous Community, overnight stays by non-residents increased 11.9% as compared to June 2015. The following destinations of non-residents were Canarias (19.5% of the total and an increase of 17.4% in overnight stays) and Cataluña (17.9% of the total and an increase of 8.8% in overnight stays).



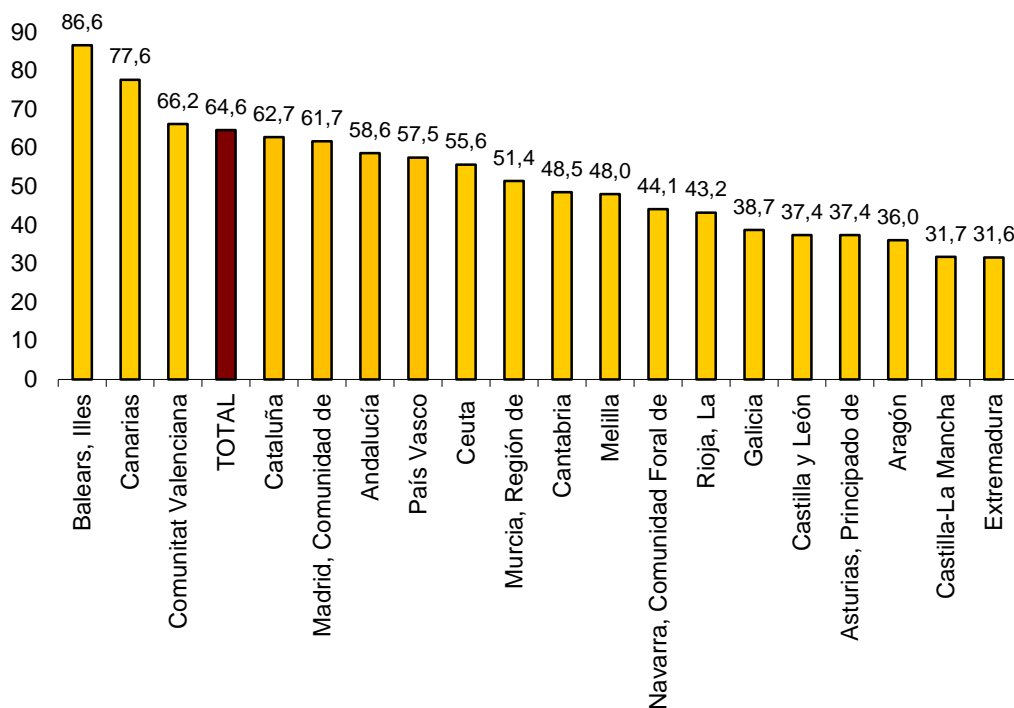
Hotel Occupancy

In June, 64.6% of the available bedplaces were occupied, indicating an annual increase of 7.5%. The weekend occupancy rate by bedplaces increased by 4.5%, standing at 70.3%.



Illes Balears registered the greatest occupancy rate by bedplaces in June (86.6%), followed by Canarias (77.6%) and Comunitat Valenciana (66.2%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the island of Mallorca registered the highest occupancy rate by bedplaces (87.6%), and the highest weekend occupancy rate (84.9%). The Costa del Sol recorded the highest number of overnight stays, with more than 2.0 million.

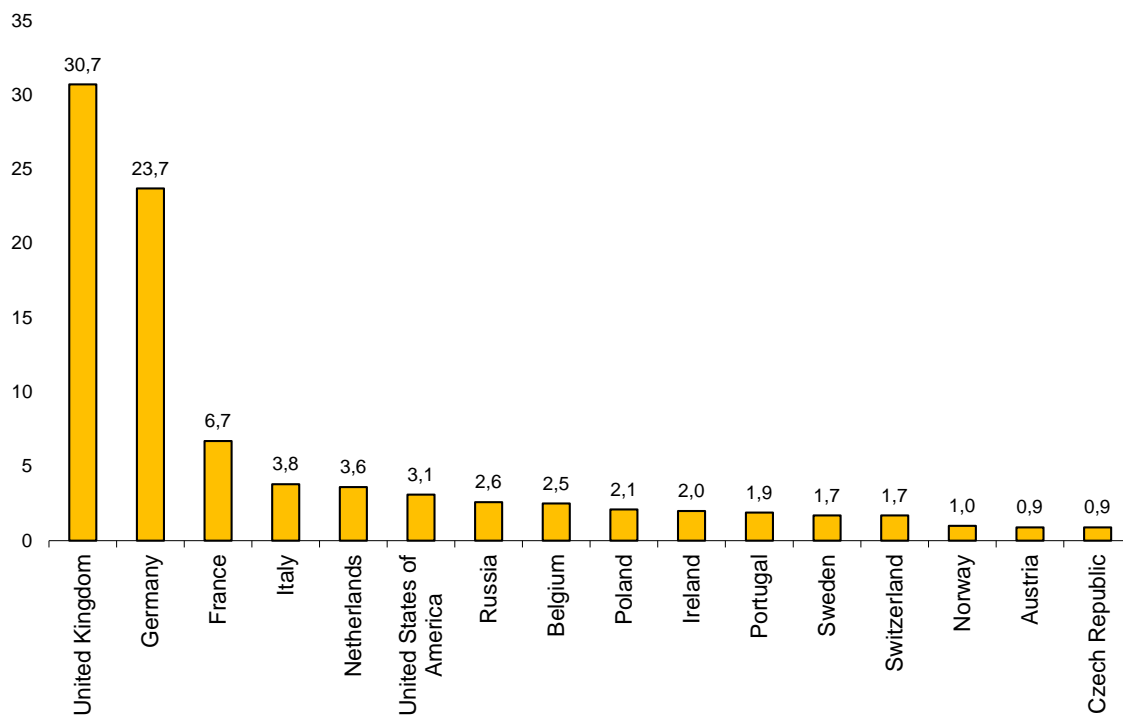
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Alcudia reached the highest occupancy rate by bedplaces (93.5%) and Muro the greatest weekend occupancy rate (93.1%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 30.7% and 23.7%, respectively, of the total of overnight stays in hotel establishments by non-residents in June. The British market increased by 17.9%, and the German one did so by 9.1%.

Overnight stays of guests from France, Italy and the Netherlands (the following countries of origin) registered annual rates of 11.5%, 10.9% and 15.8%, respectively.

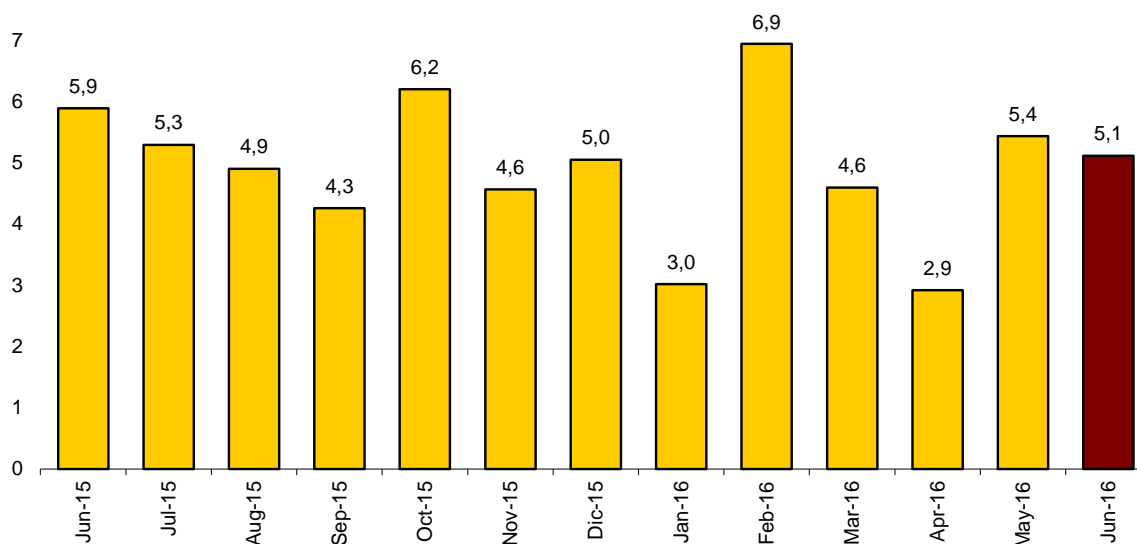
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 5.1% in June, that is, 0.3 points less than that of the previous month and 0.8 points below than that registered in the previous year.

Hotel Prices Index. Annual variation rate



Illes Balears, Cataluña, Andalucía and Canarias were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of June (they represented 74.4% of the total). Hotel prices increased by 8.1% in the annual rate in Canarias, 5.6% in Andalucía, 5.1% in Illes Balears and 4.1% in Cataluña.

By hotel category, increase in hotel prices were registered in all of them. In five-golden-star establishments (6.7%), in one-silver-star establishments (5.7%), in four-golden-star establishments (5.5%), in one-golden-star establishments (4.4%), in two-golden-star establishments (4.3%) in three-golden-star establishments (4.2%) and in three-silver-star and in two-silver-star establishments (1.3% in both cases).

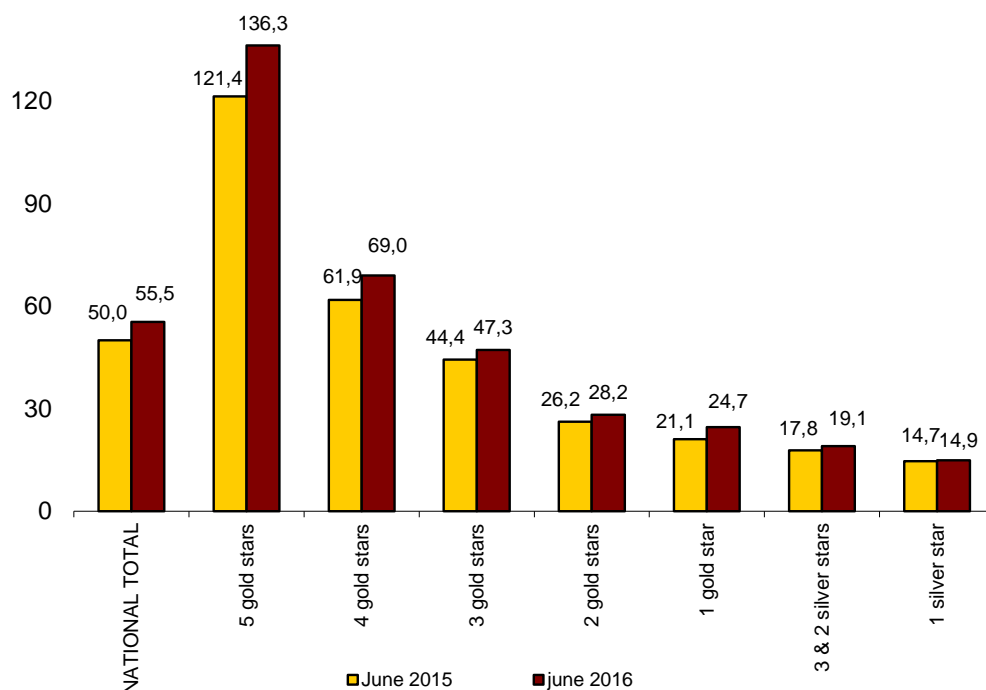
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in June was 79.5 euros, which represented an increase of 4.5% as compared to the same month of 2015.

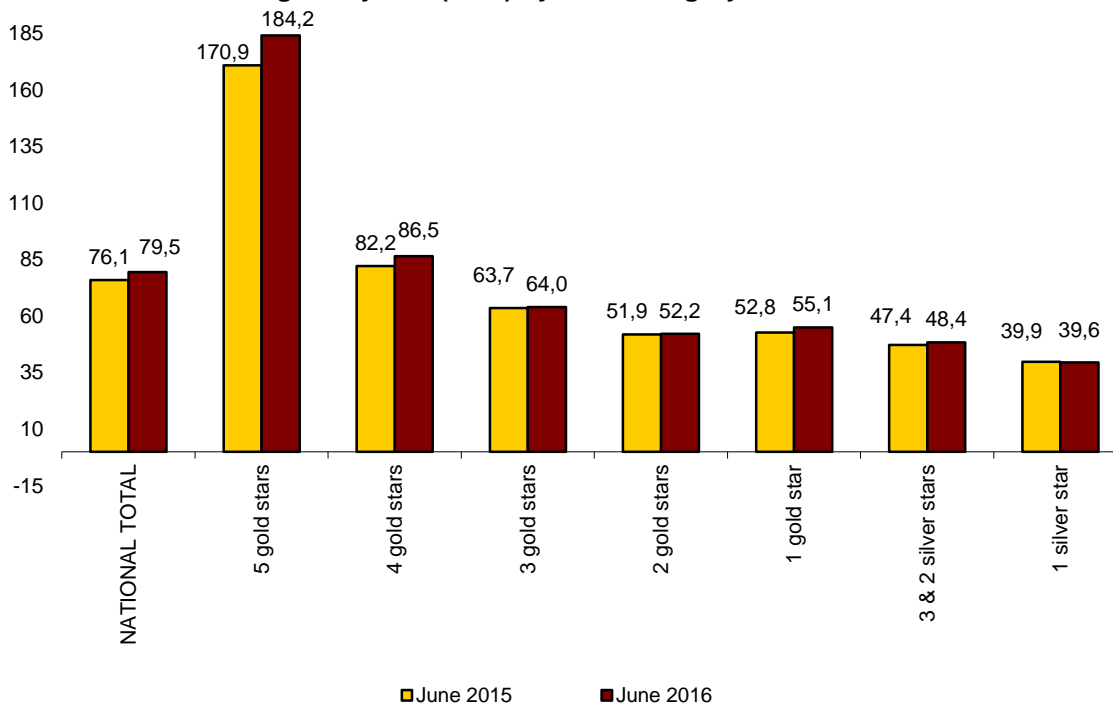
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 55.5 euros, with an increase of 10.9%.

By category, the average invoicing was 184.2 euros for five-star hotels, 86.5 euros for four-star hotels and 64.0 euros for three-star hotels. Income per available room for the same categories were 136.3, 69.0 and 47.3 euros, respectively.

Revenue per available room (RevPAR) by hotel category in euros



Average daily rate (ADR) by hotel category in euros



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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

June 2016

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	10,100,855	4,689,177	5,411,678	34,952,632	10,713,104	24,239,528	3.46
HOTELS: Golden stars							
Five	537,718	150,279	387,439	1,858,112	319,318	1,538,794	3.46
Four	4,639,935	2,072,584	2,567,351	17,227,279	4,895,366	12,331,913	3.71
Three	2,881,026	1,311,814	1,569,212	11,334,642	3,269,500	8,065,142	3.93
Two	770,091	444,685	325,406	1,967,724	898,519	1,069,204	2.56
One	321,819	192,983	128,836	669,952	354,171	315,781	2.08
INNS: Silver stars							
Two and three	478,728	286,142	192,587	967,605	516,848	450,756	2.02
One	471,538	230,692	240,846	927,318	459,380	467,938	1.97
Annual rate	6.53	2.21	10.58	8.91	1.34	12.63	2.24
Cumulative annual rate	7.58	4.74	10.63	9.34	4.70	12.01	1.63

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	16,305	842,049	1,750,454	64.55	70.29	69.76	242,786
HOTELS: Golden stars							
Five	289	44,106	91,652	66.39	71.01	73.91	31,212
Four	2,459	358,054	771,308	72.02	77.62	79.86	117,686
Three	2,945	246,263	517,692	70.39	73.99	73.76	62,999
Two	2,114	67,988	133,198	48.38	58.12	53.64	12,142
One	1,300	28,359	55,137	40.22	51.05	45.46	4,882
INNS: Silver stars							
Two and three	3,139	48,732	92,243	34.61	43.97	39.30	7,349
One	4,059	48,547	89,224	34.42	41.89	38.65	6,516
Annual rate	-0.17	0.58	0.75	7.46	4.45	6.79	5.02

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									
Isla de Mallorca	89,821	978,004	361,062	6,575,751	87.56	84.95	88.08	6.50	38,156
Isla de Menorca	24,924	99,989	102,323	738,212	84.53	77.80	89.96	6.73	4,516
Palma - Calvià	40,300	399,301	126,842	2,297,752	83.78	82.29	86.68	5.52	14,482
Isla de Lanzarote	19,567	95,811	97,150	814,143	83.59	81.06	91.15	7.90	5,954
Islas de Ibiza-Formentera	44,108	261,980	153,968	1,366,913	83.51	83.36	82.27	4.97	11,030
Sur De Gran Canaria	34,411	140,805	142,155	1,180,903	80.53	81.88	87.07	7.55	11,051
Sur De Tenerife	39,912	169,790	161,679	1,408,009	79.90	82.38	85.70	7.49	13,167
Isla de Fuerteventura	16,823	115,377	104,583	1,031,407	78.18	77.96	86.12	8.59	7,933

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

Costa del Sol	179,677	327,113	482,558	1,565,092	73.42	78.06	82.96	4.04	13,365
Isla de Tenerife	82,289	196,812	349,894	1,601,646	76.80	78.84	82.17	6.99	16,303
Barcelona	139,276	583,767	265,379	1,567,567	74.85	80.79	85.30	2.54	13,583
Costa Blanca	192,185	171,375	738,206	919,859	77.98	83.10	79.54	4.56	9,389
Costa Daurada	208,329	143,570	555,268	856,625	67.61	68.53	72.10	4.01	6,345
Isla de Gran Canaria	55,760	148,888	194,917	1,211,450	77.19	78.90	84.18	6.87	11,942
Costa Brava	172,320	243,818	375,585	991,090	56.46	70.37	59.17	3.28	8,707
Costa Barcelona	157,334	244,191	318,621	854,715	63.94	69.63	73.15	2.92	6,304

Tourist site with a greater occupancy rate per month

Alcúdia	1,843	75,310	8,602	610,549	93.54	90.35	94.59	8.02	3,269
Sant Josep De Sa Talaia	8,872	83,507	28,444	376,017	89.86	85.34	82.53	4.38	3,375
Muro	6,183	57,156	37,222	472,233	89.52	93.09	93.97	8.04	2,520
Santanyí	2,041	45,689	7,067	348,962	87.19	83.32	88.72	7.46	1,643
Ciutadella De Menorca	13,653	36,522	58,041	287,748	87.11	73.75	90.35	6.89	1,725
Formentera	6,287	17,588	20,613	101,261	86.85	88.02	90.27	5.10	737
Tías	4,180	30,682	21,259	264,406	86.69	83.63	91.74	8.19	1,652
Eivissa	13,611	52,099	36,999	206,521	86.28	89.42	86.38	3.71	1,814
Sant Llorenç Des Cardassar	2,661	87,032	15,459	629,773	85.84	85.55	91.67	7.19	3,497
Benidorm	74,694	102,317	426,487	666,944	85.83	84.75	85.84	6.18	5,381

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

Barcelona	124,830	561,483	234,028	1,511,053	75.52	81.25	85.65	2.54	12,914
Madrid	379,429	429,104	622,417	965,053	64.85	72.27	79.79	1.96	11,019
Calvià	12,832	178,151	45,824	1,197,323	82.11	79.65	86.07	6.51	7,415
Palma	26,741	212,880	73,760	1,011,493	85.32	84.67	87.89	4.53	6,365
San Bartolomé De Tirajana	27,868	100,709	118,398	872,127	83.14	85.27	88.40	7.70	8,785
Salou	77,660	91,858	238,206	631,793	75.72	69.91	79.06	5.13	3,030
Adeje	19,026	86,668	85,745	737,920	81.71	83.77	87.78	7.79	7,096
Pájara	7,782	75,013	43,272	693,510	81.94	82.95	87.62	8.90	5,093
Lloret De Mar	47,683	96,245	126,120	492,322	63.77	73.31	65.27	4.30	2,632
Torremolinos	40,332	70,923	136,581	405,591	82.43	91.27	87.80	4.87	2,768

* 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	10,100,855	100.00	34,952,632	100.00
Residents in Spain	4,689,177	46.42	10,713,104	30.65
Residents abroad	5,411,678	53.58	24,239,528	69.35
Total Residents abroad	5,411,678	100.00	24,239,528	100.00
Total Residents in E.U. (without Spain)	3,991,301	73.75	20,290,389	83.71
- Germany	889,526	16.44	5,754,863	23.74
- Austria	50,725	0.94	218,039	0.90
- Belgium	123,346	2.28	613,876	2.53
- Denmark	45,492	0.84	209,342	0.86
- Finland	27,544	0.51	100,773	0.42
- France	515,843	9.53	1,612,980	6.65
- Greece	10,115	0.19	24,827	0.10
- Ireland	96,892	1.79	490,766	2.02
- Italy	286,876	5.30	931,726	3.84
- Luxembourg	9,857	0.18	52,766	0.22
- Netherlands	188,373	3.48	874,404	3.61
- Poland	92,558	1.71	514,591	2.12
- Portugal	154,229	2.85	452,695	1.87
- United Kingdom	1,281,404	23.68	7,447,480	30.72
- Czech Republic	34,365	0.64	211,345	0.87
- Sweden	86,809	1.60	411,977	1.70
- Other EU countries*	97,347	1.80	367,938	1.52
Norway	57,442	1.06	252,322	1.04
Russia	104,326	1.93	621,197	2.56
Switzerland	97,864	1.81	407,754	1.68
Rest of Europe	93,318	1.72	324,886	1.34
Japan	50,458	0.93	90,810	0.37
United States of America	335,195	6.19	758,317	3.13
Rest of America	289,364	5.35	683,974	2.82
Africa	35,528	0.66	80,359	0.33
Other countries	356,882	6.59	729,520	3.01

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

Hotel Price Index (HPI). 2008 Base

June 2016

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	104.9	5.1
Andalucía	99.7	5.6
Aragón	64.7	0.2
Asturias, Principado de	86.6	4.8
Balears, Illes	120.8	5.1
Canarias	117.5	8.1
Cantabria	94.4	4.8
Castilla y León	88.7	2.3
Castilla - La Mancha	84.2	0.6
Cataluña	105.0	4.1
Comunitat Valenciana	105.3	5.8
Extremadura	89.1	3.6
Galicia	94.0	3.5
Madrid, Comunidad de	82.4	3.0
Murcia, Región de	81.3	5.0
Navarra, Comunidad Foral de	82.9	2.0
País Vasco	104.4	7.6
Rioja, La	81.0	-0.4
Ceuta	98.0	-3.5
Melilla	102.7	-2.4

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	104.9	5.1
HOTELS: Gold stars		
Five	102.1	6.7
Fourth	101.2	5.5
Three	111.2	4.2
Two	105.4	4.3
One	111.1	4.4
HOSTALS: Silver stars		
Three and two	98.6	1.3
One	100.8	5.7

Indicators on the Profitability of the Hotel Sector

June 2016

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	79.5	4.5	55.5	10.9
Andalucía	81.2	6.6	54.3	12.8
Aragón	52.5	2.0	22.5	18.4
Asturias, Principado de	52.6	3.0	23.3	9.7
Balears, Illes	86.4	5.1	75.4	9.9
Canarias	80.8	6.8	68.4	17.1
Cantabria	59.7	3.2	31.2	12.0
Castilla y León	54.1	0.7	23.3	5.2
Castilla - La Mancha	53.1	0.4	19.6	15.9
Cataluña	86.5	1.6	60.1	8.6
Comunitat Valenciana	71.5	6.5	48.8	6.5
Extremadura	56.7	3.2	20.8	7.1
Galicia	52.8	1.0	22.9	9.3
Madrid, Comunidad de	81.6	2.2	61.1	7.5
Murcia, Región de	57.3	-0.4	31.8	11.2
Navarra, Comunidad Foral de	60.4	1.3	30.5	8.0
País Vasco	85.2	9.1	58.7	13.3
Rioja, La	60.2	3.3	31.7	-1.4
Ceuta	69.3	-3.3	39.8	12.2
Melilla	65.2	1.3	40.3	-4.1

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	79.5	4.5	55.5	10.9
HOTELS: Gold stars				
Five	184.2	7.8	136.3	12.3
Four	86.5	5.3	69.0	11.5
Three	64.0	0.6	47.3	6.4
Two	52.2	0.6	28.2	7.9
One	55.1	4.3	24.7	17.0
GUESTHOUSES: Silver stars				
Three and two	48.4	2.1	19.1	7.0
One	39.6	-0.6	14.9	1.4

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room