

23 August 2013

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

**Overnight stays in hotel establishments increase 0.5% in July, as compared with the same month in 2012**

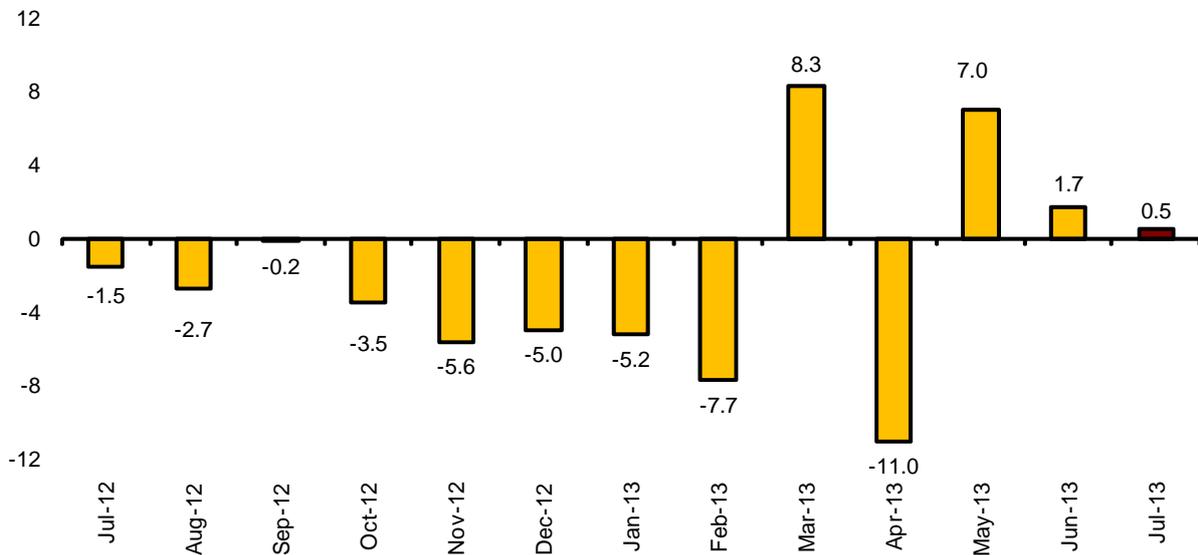
**Hotels earn 52.8 euros per available room and invoice an average of 79.2 euros per occupied room**

During the month of July, 37.6 million overnight stays were recorded in hotel establishments, indicating a 0.5% increase as compared with the same month in 2012. Overnight stays for residents in Spain decreased 1.4%, whereas that for non-residents increased 1.4%.

The average stay increased 0.4%, as compared with July 2012, standing at 3.9 nights per guest.

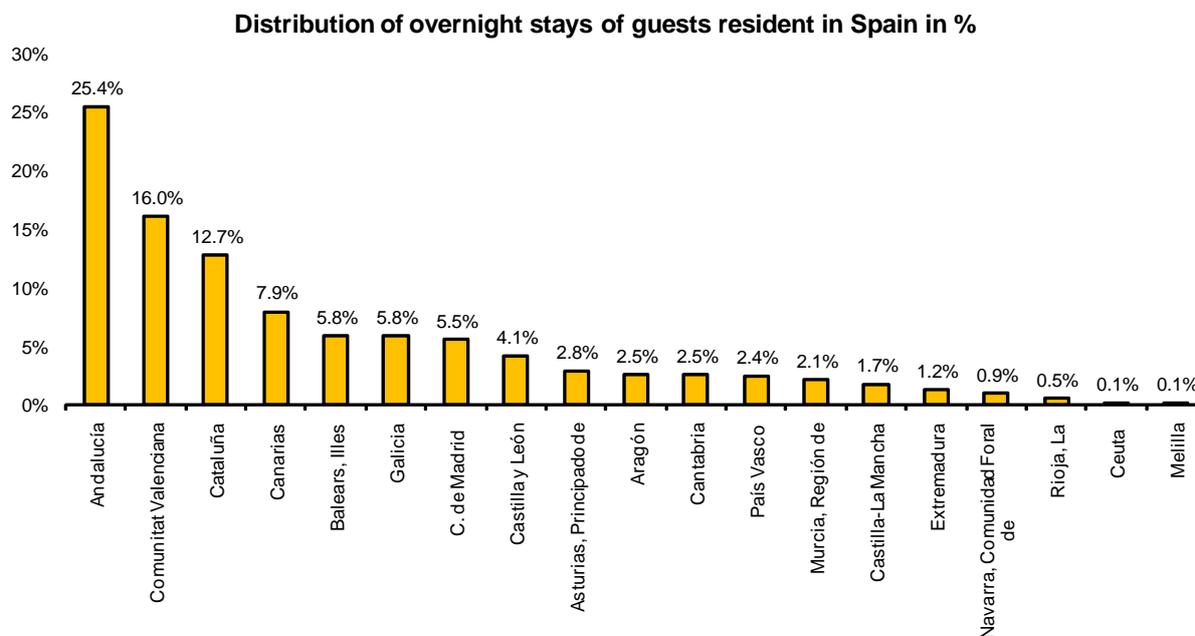
During the first seven-month period of 2013, overnight stays decreased 0.2% as compared with the same month of the previous year.

**Interannual rates of overnight stays in %**

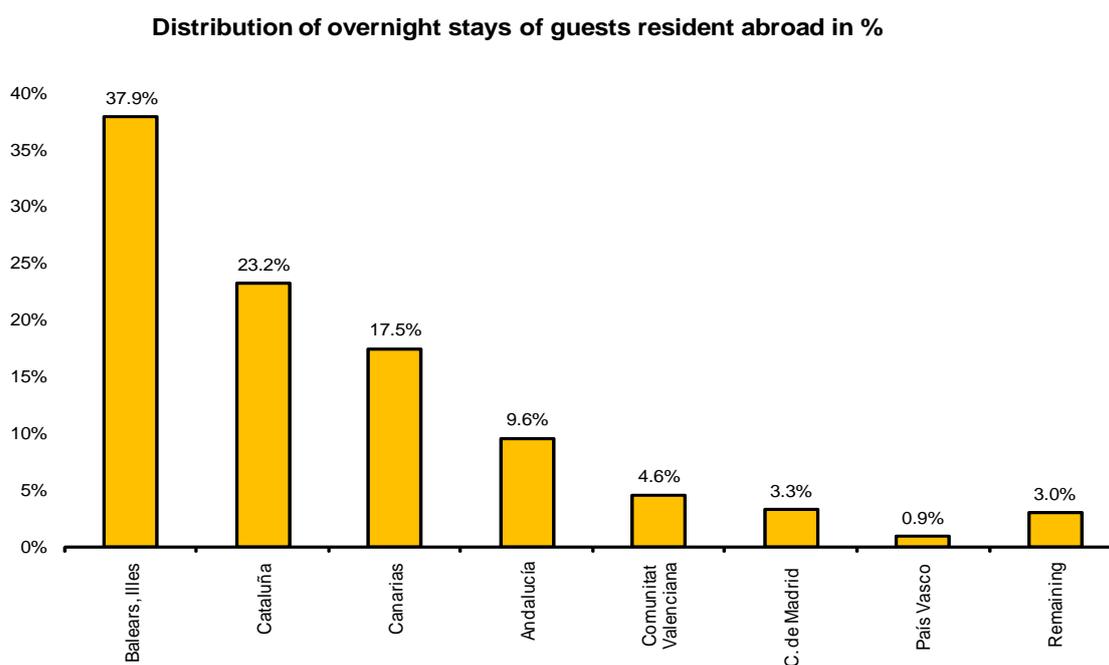


### Main destinations

In July, Andalucía, Comunitat Valenciana, Cataluña and Canarias were the main destinations of guests resident in Spain, with interannual rates for overnight stays of 4.1%, -1.2%, -7.3% and -9.0%, respectively.



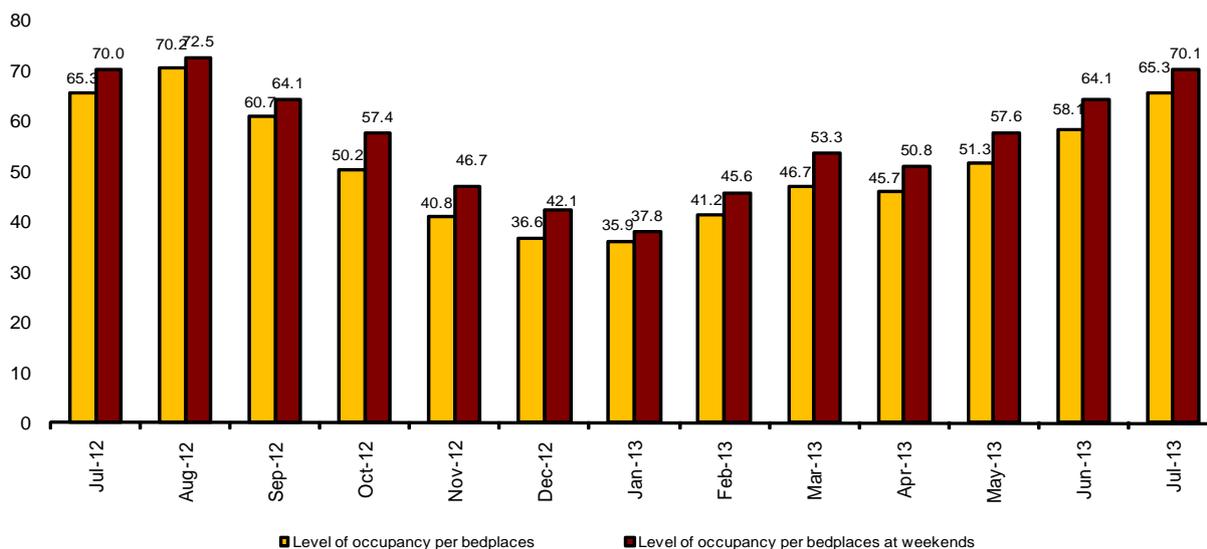
The main destination chosen by non-residents was Illes Balears. In this Autonomous Community, overnight stays by foreign nationals decreased 1.2%, as compared with the same month of 2012. Followed by Cataluña, with a 2.5% increase, and Canarias, with a 3.9% increase.



### Hotel Occupancy

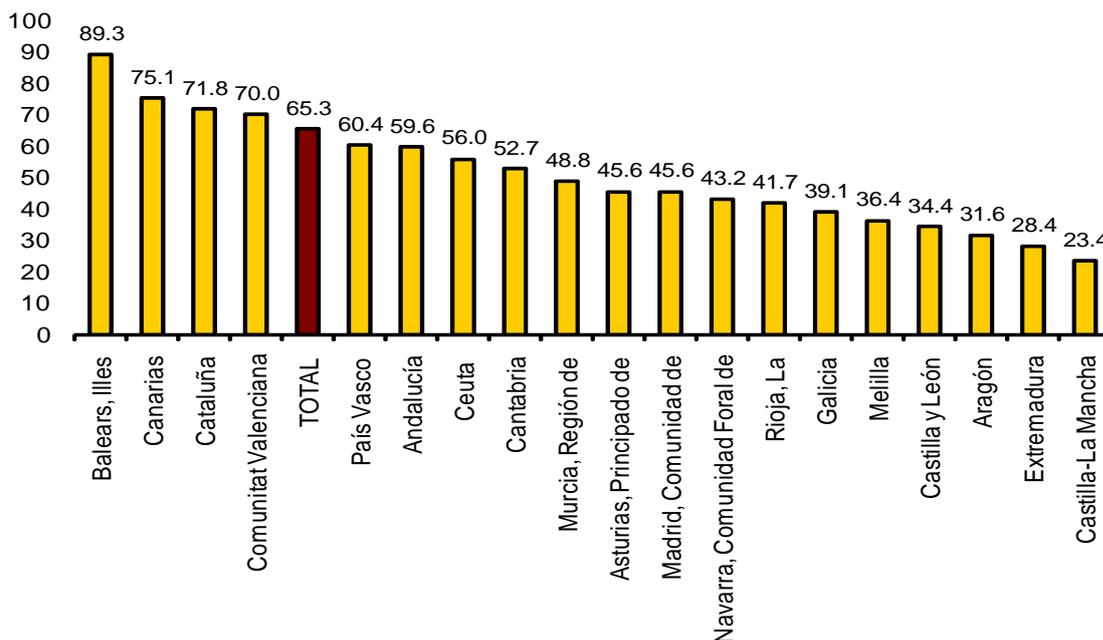
In terms of occupancy, 65.3% of the available bedplaces were occupied in July, figure equal to that estimated in July 2012. The weekend occupancy rate by bedplaces increased 0.1% and stood at 70.1%.

Level of occupancy per bedplaces and per bedplaces at weekends



During the month of July, Illes Balears was the Autonomous Community with the highest occupancy rate by bedplaces (89.3%), followed by Canarias (75.1%) and Cataluña (71.8%).

Level of occupancy per bedplaces by Automous Communities



By tourist areas, Palma-Calvià presented both the highest occupancy rate by bedplaces in July (90.8%) and the highest weekend occupancy rate by bedplaces (90.4%). In the island of Mallorca over 7.6 million overnight stays were registered in July.

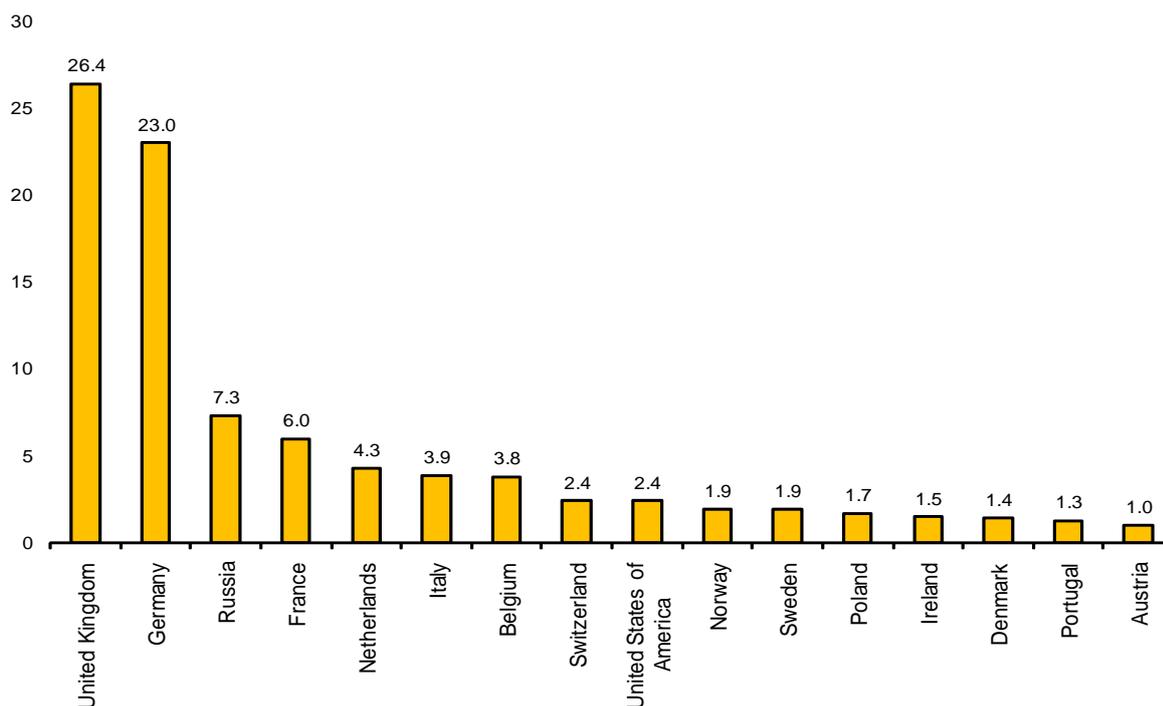
The tourist sites with the highest number of overnight stays were Barcelona, Calvià and Madrid. Santa Margalida also reached the highest occupancy rate by bedplaces (96.9%) and the highest weekend occupancy (97.6%).

### Overnight stays of guests resident abroad

Guests from the United Kingdom and Germany registered 26.4% and 23.0%, respectively, of the total of overnight stays by non-residents in July. The British market experienced a 2.6% annual increase, in turn, the German market decreased 2.9%.

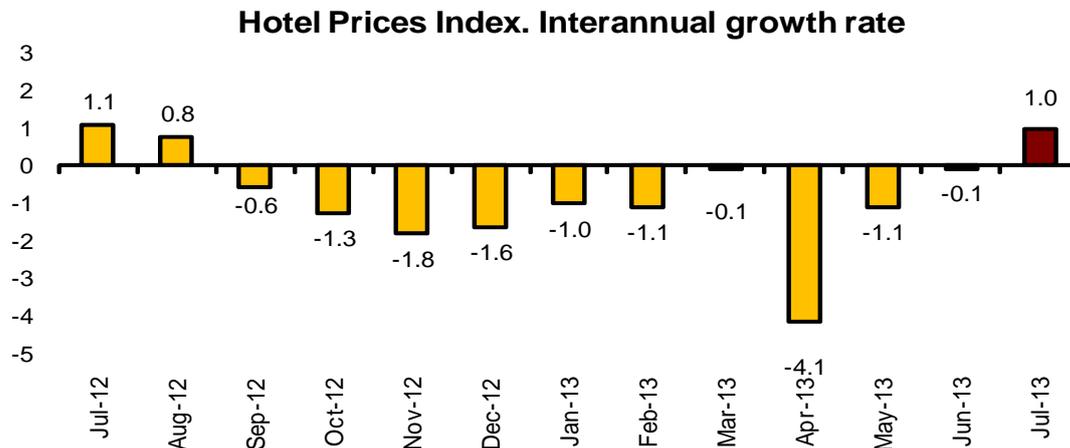
Overnight stays of guests from Russia, France and The Netherlands (the following countries of origin) registered annual rates of 14.4%, 2.5% and -7.8%, respectively.

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



## Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 1.0% in July, that is, 1.1 point higher than that of the previous month, and 0.1 points less than that registered the previous year.



Within the four Autonomous Communities (Illes Balears, Cataluña, Andalucía and Canarias) that carried the greatest weight of total load of the HPI in the month of July (together they represent 75.7% of the total weight), only Andalucía registered negative annual rates.

Illes Balears, which carried the greatest load in the weighting structure this month, registered an annual rate of 5.1%, 2.5 points higher than that estimated in June. Hotel prices experienced an increase of 0.7% in Cataluña, 0.7 points less as compared with the previous month. Andalucía registered  $-2.2\%$  rate, as compared with the  $-3.5\%$  registered in the previous month. In Canarias, the annual variation in prices was 4.8%, that is, 2.3 points higher as compared with that registered in June.

By hotel category, the decreases in hotel prices were registered in three and two-golden-star hotels ( $-7.2\%$ ) and in three and two-golden-star hotels ( $-4.1\%$ ).

The remaining categories registered positive rates: one-silver-star establishments (4.3%), three-golden-star establishments (1.6%), four-golden-star establishments (1.5%), five-golden-stars establishments (1.0%) and one-golden-star establishments (0.3%).

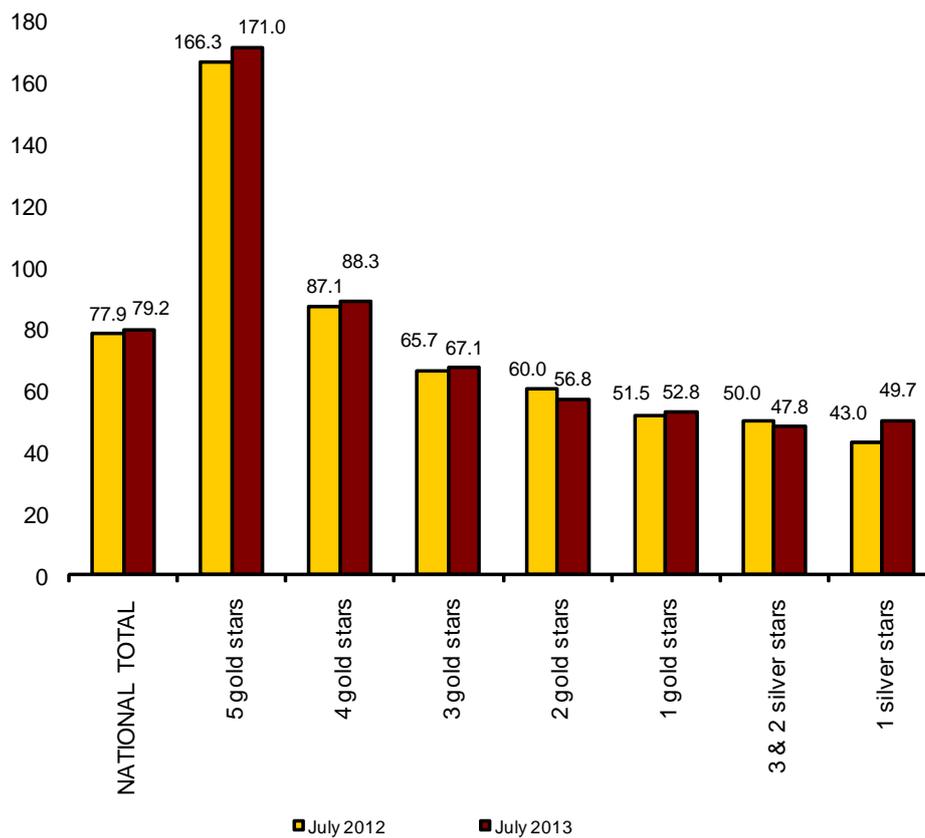
### Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in July was 79.2 euros, a 1.7% increase, as compared with the same month in 2012.

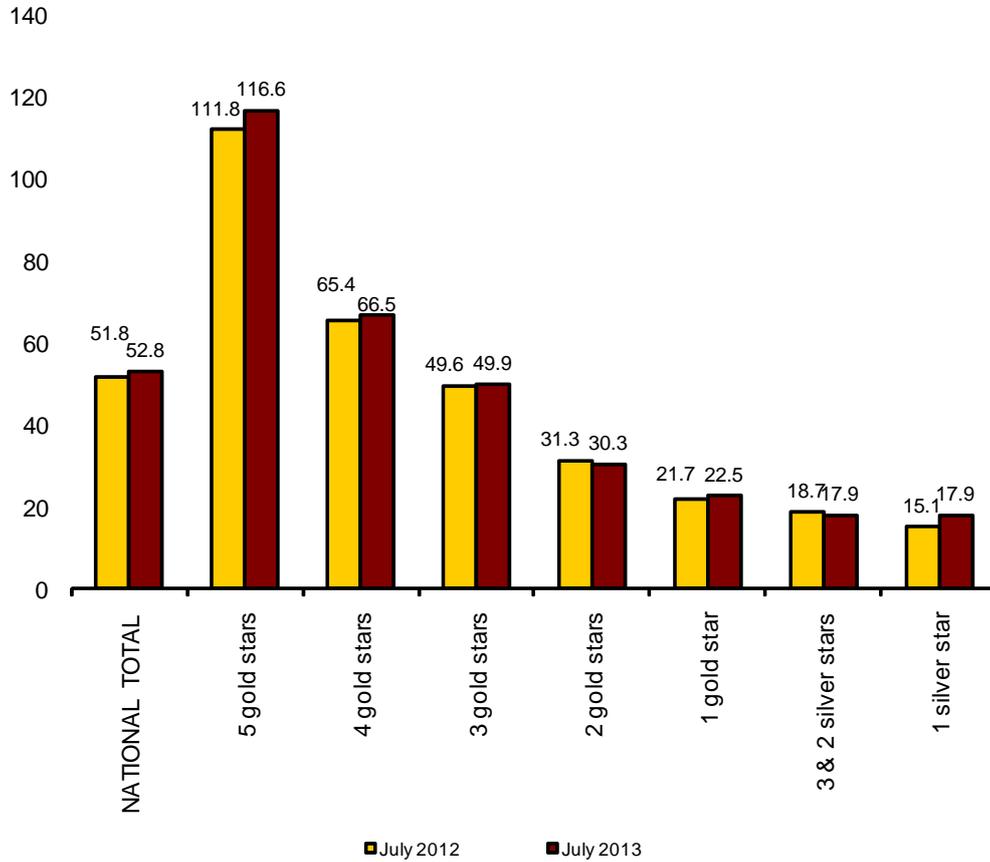
In turn, the average daily income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 52.8 euros, with a 2.1% increase as compared with July 2012.

By category, the average invoicing was 171.0 euros for five-star hotels, 88.3 euros for four-star hotels and 67.1 euros for three-star hotels. Income per available room for the same categories was 116.6, 66.5 and 49.9 euros, respectively.

**Average daily rate (ADR)**



**Revenue per available room (RevPAR)**



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

July 2013

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	
<b>TOTAL</b>	<b>9,621,527</b>	<b>4,594,579</b>	<b>5,026,948</b>	<b>37,581,401</b>	<b>12,438,341</b>	<b>25,143,060</b>	<b>3.91</b>
HOTELS: Golden stars							
Five	451,016	153,372	297,644	1,720,842	412,405	1,308,437	3.82
Four	4,134,826	1,941,126	2,193,700	17,053,810	5,673,596	11,380,214	4.12
Three	3,064,554	1,325,308	1,739,246	13,570,440	3,765,049	9,805,391	4.43
Two	809,296	479,058	330,238	2,300,994	1,082,224	1,218,769	2.84
One	283,807	176,091	107,716	723,742	389,686	334,056	2.55
INNS: Silver stars							
Two and three	467,082	290,595	176,487	1,201,311	590,353	610,958	2.57
One	410,945	229,029	181,917	1,010,263	525,028	485,235	2.46
Interannual rate	0.06	0.36	-0.22	0.50	-1.37	1.44	0.44
Cumulative interannual rate	-1.29	-4.54	2.26	-0.15	-5.43	2.95	1.16

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

Category	Estimated open establishments	Estimated bedplaces	Occupancy rate			Employed personnel
			Of bedplaces	Of bedplaces at weekend	Of bedrooms	
<b>TOTAL</b>	<b>16,862</b>	<b>1,754,176</b>	<b>65.33</b>	<b>70.08</b>	<b>66.69</b>	<b>233,384</b>
HOTELS: Golden stars						
Five	271	83,222	64.67	69.69	68.33	24,517
Four	2,304	716,907	72.60	76.83	75.36	108,470
Three	3,029	550,981	73.59	77.47	74.42	66,338
Two	2,152	141,694	51.35	59.01	53.14	13,030
One	1,365	57,320	40.26	47.34	42.59	5,267
INNS: Silver stars						
Two and three	3,371	107,640	35.65	42.76	37.39	8,743
One	4,370	96,411	33.28	38.42	35.51	7,019
Interannual rate	-1.36	0.67	0.03	0.11	0.42	-1.83

### 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 bedplac	Of bedplaces	Of bedrooms at weekend		
<b>Tourist area with a greater occupancy rate per month</b>									
Palma - Calvià	51,374	424,856	178,287	2,730,084	90.80	90.40	90.92	6.11	13,308
Isla de Mallorca	80,663	1,012,054	334,184	7,313,985	90.36	89.48	90.05	7.00	36,293
Islas de Ibiza-Formentera	52,619	258,971	201,860	1,625,113	87.55	89.16	89.42	5.86	8,498
Isla de Lanzarote	29,776	79,990	185,849	747,310	85.45	81.33	83.40	8.50	5,230
Costa Daurada	129,298	198,975	449,076	1,349,432	83.75	87.59	85.27	5.48	6,640
Isla de Menorca	34,055	72,989	181,019	597,613	83.58	81.00	85.33	7.27	3,897
Costa de Gipuzkoa	35,331	39,832	71,319	94,018	81.49	88.02	84.32	2.20	1,157
Costa Blanca	238,556	152,672	1,019,276	823,059	80.29	87.30	77.99	4.71	9,064

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

Costa del Sol	237,607	249,716	816,538	1,310,057	74.11	81.21	77.64	4.36	12,842
Isla de Tenerife	90,063	185,562	390,888	1,611,808	73.66	77.26	75.23	7.27	15,005
Costa Brava	145,015	294,306	353,361	1,537,145	70.77	78.01	71.29	4.30	9,462
Barcelona	119,536	578,619	227,940	1,645,610	78.35	80.25	84.88	2.68	12,325
Sur de Tenerife	49,922	162,015	221,670	1,437,520	78.38	82.24	81.02	7.83	12,025
Isla de Gran Canaria	66,570	126,463	276,574	1,070,190	73.42	75.36	73.91	6.98	9,780
Sur de Gran Canaria	48,016	119,791	230,366	1,047,524	78.58	80.05	78.42	7.62	8,882
Isla de Fuerteventura	19,411	100,925	98,904	934,571	77.05	76.56	77.92	8.59	6,721

#### Tourist site with a greater occupancy rate per month

Santa Margalida	1,594	56,310	5,709	470,601	96.85	97.59	94.89	8.23	2,017
Muro	5,060	82,725	18,778	554,281	95.41	91.78	94.66	6.53	2,651
Sant Antoni de Portmany	6,674	60,084	33,543	358,561	93.77	96.25	91.32	5.87	1,347
Son Servera	184	34,450	694	290,240	93.50	96.21	93.49	8.40	1,324
Salou	43,429	115,971	178,536	882,377	92.77	93.61	91.11	6.66	3,323
Alcúdia	2,373	74,306	26,878	557,903	92.72	90.67	91.58	7.63	3,105
Manacor	5,540	56,654	39,705	492,956	92.31	87.33	93.33	8.56	2,287
Calvià	11,340	207,081	68,977	1,573,946	91.80	91.53	92.73	7.52	6,759
Malgrat de Mar	3,799	26,692	18,482	187,074	91.59	90.58	85.39	6.74	635
Sant Llorenç des Cardassar	1,798	78,251	8,156	665,349	90.98	85.54	88.50	8.41	2,825

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

Barcelona	108,607	554,207	207,205	1,581,175	79.21	80.90	85.56	2.70	11,872
Madrid	292,059	347,291	481,957	756,875	48.84	54.56	57.77	1.94	11,396
Benidorm	120,481	84,985	629,515	594,186	89.67	93.72	86.51	5.96	5,306
Palma	38,443	201,505	105,125	1,077,761	89.35	89.06	89.39	4.93	6,028
San Bartolomé de Tirajana	40,333	84,130	196,802	763,335	79.00	80.31	78.78	7.71	6,982
Lloret de Mar	15,800	141,960	43,649	900,216	82.65	85.47	82.29	5.98	2,989
Adeje	21,903	87,678	98,555	779,488	78.85	81.44	80.68	8.01	6,658
Pájara	11,071	68,295	62,869	633,357	79.10	76.89	76.97	8.77	4,603
Torremolinos	53,735	60,200	224,070	407,603	85.78	93.56	86.99	5.54	2,860
Capdepera	1,426	64,377	9,050	499,621	87.97	85.79	85.47	7.73	2,110

\* 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	%
<b>TOTAL</b>	<b>9,621,527</b>	<b>100.00</b>	<b>37,581,401</b>	<b>100.00</b>
Residents in Spain	4,594,579	47.75	12,438,341	33.10
Residents abroad	5,026,948	52.25	25,143,060	66.90
Total Residents abroad	5,026,948	100.00	25,143,060	100.00
Total Residents in E.U. (without Spain)	3,594,565	71.51	19,740,549	78.51
- Germany	846,921	16.85	5,778,844	22.98
- Austria	48,476	0.96	249,952	0.99
- Belgium	168,818	3.36	944,651	3.76
- Denmark	65,851	1.31	348,921	1.39
- Finland	30,137	0.60	129,189	0.51
- France	463,998	9.23	1,505,913	5.99
- Greece	9,794	0.19	23,663	0.09
- Ireland	71,188	1.42	372,093	1.48
- Italy	254,652	5.07	976,125	3.88
- Luxembourg	8,901	0.18	49,514	0.20
- Netherlands	200,066	3.98	1,073,367	4.27
- Poland	77,597	1.54	425,722	1.69
- Portugal	114,139	2.27	317,117	1.26
- United Kingdom	1,037,480	20.64	6,626,911	26.36
- Czech Republic	25,840	0.51	160,559	0.64
- Sweden	97,817	1.95	468,426	1.86
- Other EU countries*	72,891	1.45	289,583	1.15
Norway	93,407	1.86	471,341	1.87
Russia	252,166	5.02	1,832,921	7.29
Switzerland	113,209	2.25	605,126	2.41
Rest of Europe	108,563	2.16	409,361	1.63
Japan	47,932	0.95	85,415	0.34
United States of America	252,543	5.02	596,123	2.37
Rest of America	269,992	5.37	637,295	2.53
Africa	39,390	0.78	102,976	0.41
Other countries	255,181	5.08	661,953	2.63

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

## Hotel Price Index (HPI). 2008 Base

July 2013

Provisional data

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

	Index	Interannual variation rate
<b>TOTAL</b>	<b>96.2</b>	<b>1.0</b>
Andalucía	89.3	-2.2
Aragón	56.8	-2.5
Asturias, Principado de	86.6	-1.5
Balears, Illes	111.0	5.1
Canarias	102.7	4.8
Cantabria	86.9	-3.9
Castilla y León	87.4	-4.5
Castilla - La Mancha	84.5	-5.9
Cataluña	97.6	0.7
Comunitat Valenciana	91.0	-2.5
Extremadura	86.1	-3.1
Galicia	89.5	-2.6
Madrid, Comunidad de	76.3	-5.4
Murcia, Región de	78.3	-1.3
Navarra, Comunidad Foral de	85.9	-2.4
País Vasco	95.4	-0.1
Rioja, La	81.9	-4.8
Ceuta	109.7	-9.8
Melilla	95.5	3.9

### National General Index and breakdown by categories

	Index	Interannual variation rate
<b>TOTAL</b>	<b>96.2</b>	<b>1.0</b>
<b>HOTELS: Gold stars</b>		
Five	90.9	1.0
Fourth	94.7	1.5
Three	99.0	1.6
Two	95.6	-4.1
One	102.8	0.3
<b>HOSTALS: Silver stars</b>		
Three and two	93.9	-7.2
One	98.6	4.3

## Indicators on the Profitability of the Hotel Sector

July 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>79.2</b>	<b>1.7</b>	<b>52.8</b>	<b>2.1</b>
Andalucía	86.0	-1.9	53.5	-0.1
Aragón	50.5	-3.9	17.5	-3.1
Asturias, Principado de	59.6	-0.5	28.3	6.0
Balears, Illes	85.7	5.1	76.8	3.5
Canarias	76.5	5.7	57.7	6.9
Cantabria	69.7	-4.4	38.2	4.8
Castilla y León	52.8	-2.8	19.7	1.0
Castilla - La Mancha	53.0	-4.1	14.3	-7.6
Cataluña	84.4	3.2	62.6	2.7
Comunitat Valenciana	73.5	-3.4	50.8	-1.7
Extremadura	52.7	-3.0	16.6	-1.3
Galicia	55.0	-3.8	22.5	0.1
Madrid, Comunidad de	70.8	-5.3	38.1	-7.8
Murcia, Región de	68.5	-5.4	32.4	-8.2
Navarra, Comunidad Foral de	79.3	5.9	35.8	11.9
País Vasco	82.3	2.3	55.2	-2.4
Rioja, La	57.8	-2.9	26.0	0.4
Ceuta	70.4	-5.6	40.2	1.5
Melilla	66.7	0.0	26.5	-25.7

### 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>79.2</b>	<b>1.7</b>	<b>52.8</b>	<b>2.1</b>
<b>HOTELS: Gold stars</b>				
Five	171.0	2.9	116.6	4.3
Four	88.3	1.4	66.5	1.6
Three	67.1	2.0	49.9	0.7
Two	56.8	-5.4	30.3	-3.0
One	52.8	2.5	22.5	3.6
<b>GUESTHOUSES: Silver stars</b>				
Three and two	47.8	-4.3	17.9	-4.1
One	49.7	15.8	17.9	19.0

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