

22 August 2014

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
July 2014. *Provisional data*

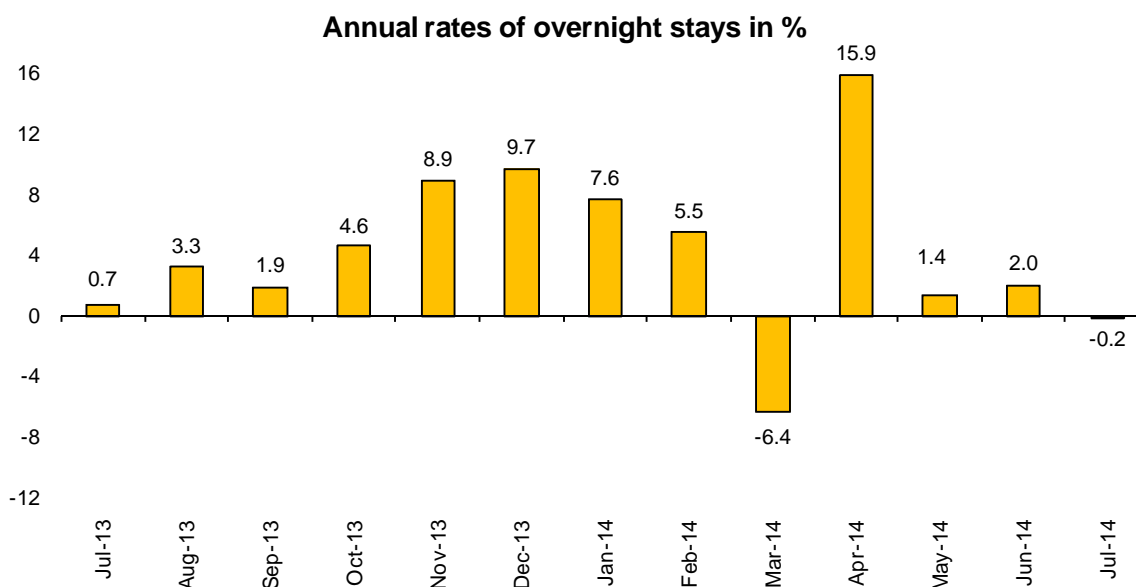
Overnight stays in hotel establishments registered a decrease of 0.2% in July, as compared to the same month of 2013

Hotels earn 54.6 euros per available room and invoice an average of 81.7 euros per occupied room

In July, a total of 37.5 million overnight stays were registered in hotel establishments, indicating a decrease of 0.2% as compared with the same month of 2013. Overnight stays for residents in Spain increased 2.9% while those of non-residents decreased by 1.8%.

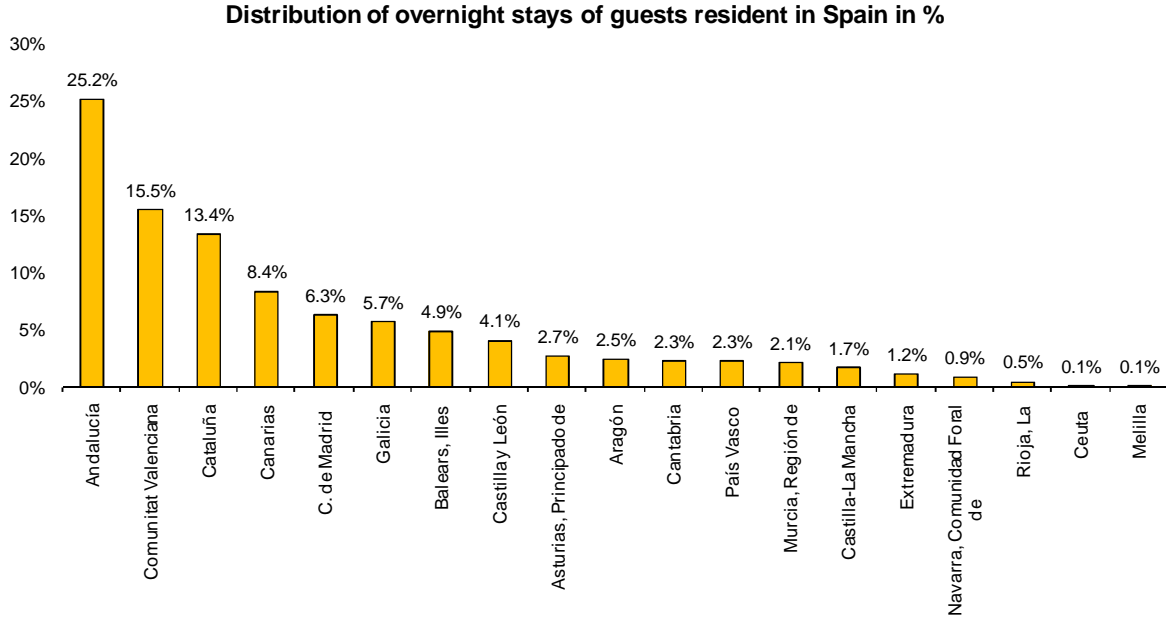
The average stay decreased 2.6%, as compared with July 2013, standing at 3.8 nights per guest.

In the first seven months of 2014, overnight stays increased 2.8% as compared with the same period of the previous year.

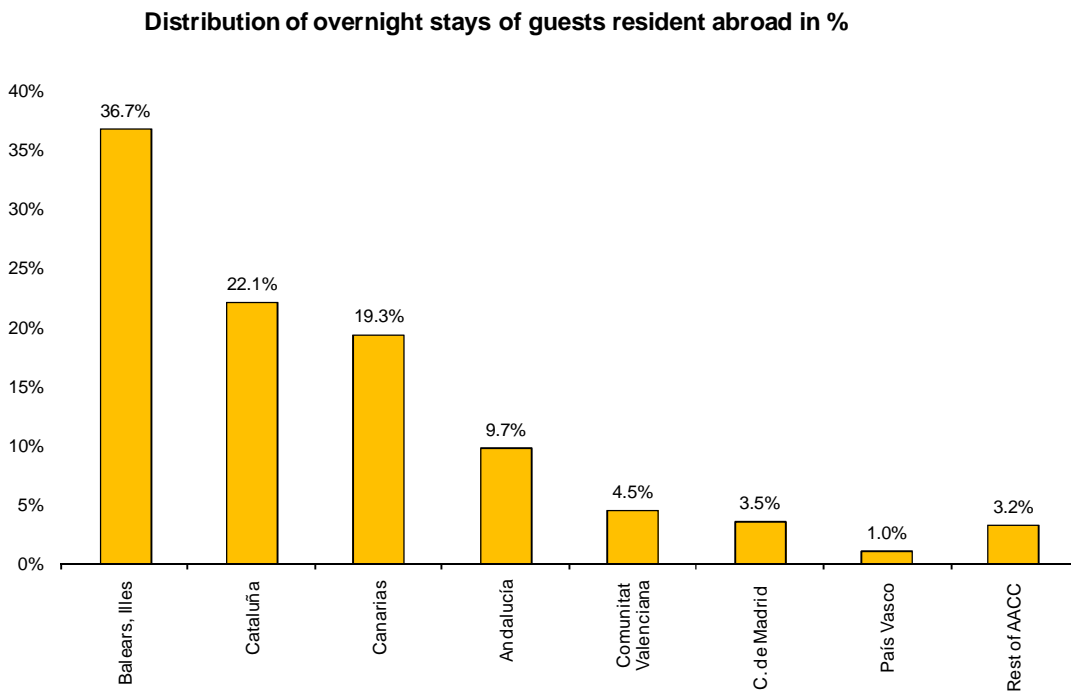


Main destinations

In July, Andalucía, Comunitat Valenciana, Cataluña and Canarias were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 2.2%, -0.8%, 10.0% and 7.1%, respectively.



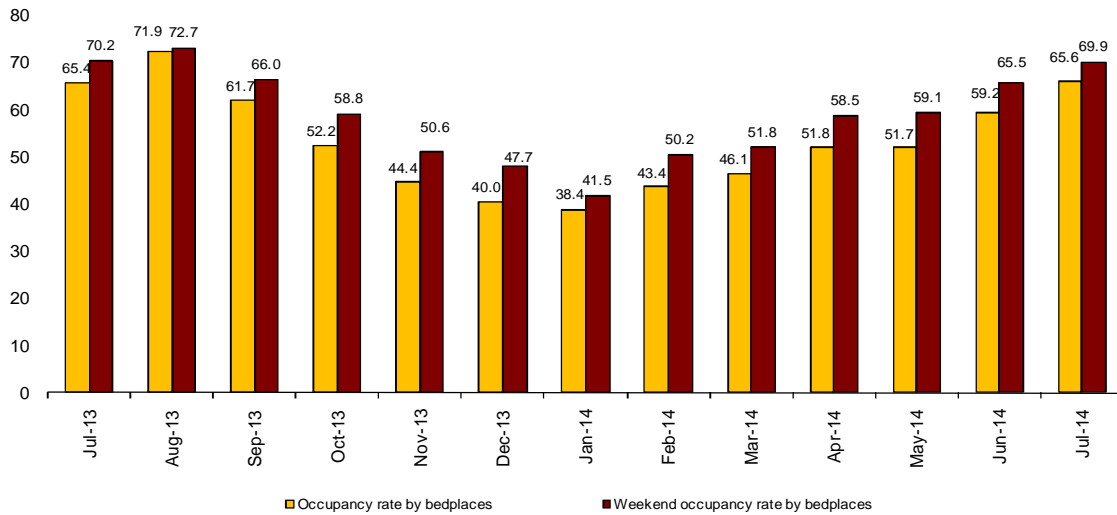
The main destination chosen by non-residents was Illes Balears, with 36.7% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 4.7%, as compared with July 2013. Illes Balears was followed by Cataluña (22.1% of the total) and Canarias (19.3%). The overnight stays of non-residents in these Autonomous Communities decreased by 6.7% and increased by 7.7%, respectively.



Hotel Occupancy

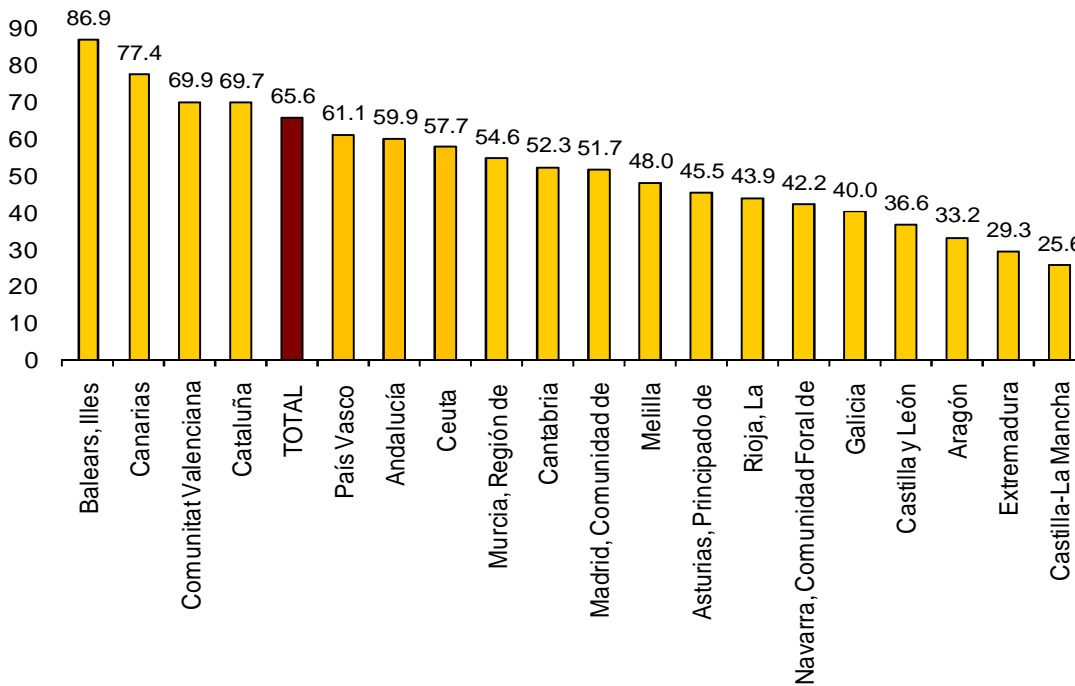
In terms of occupancy, 65.6% of the available bedplaces were occupied in July, indicating an annual increase of 0.4%. The weekend occupancy rate by bedplaces decreased 0.5%, standing at 69.9%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears registered the greatest occupancy rate by bedplaces in July (86.9%), followed by Canarias (77.4%) and Comunitat Valenciana (69.9%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, Lanzarote island registered in July the highest occupancy rate by bedplaces (89.8%) and Palma-Calvià did so with the weekend occupancy rate (87.8%). Mallorca recorded the highest number of overnight stays, with more than 7.2 million.

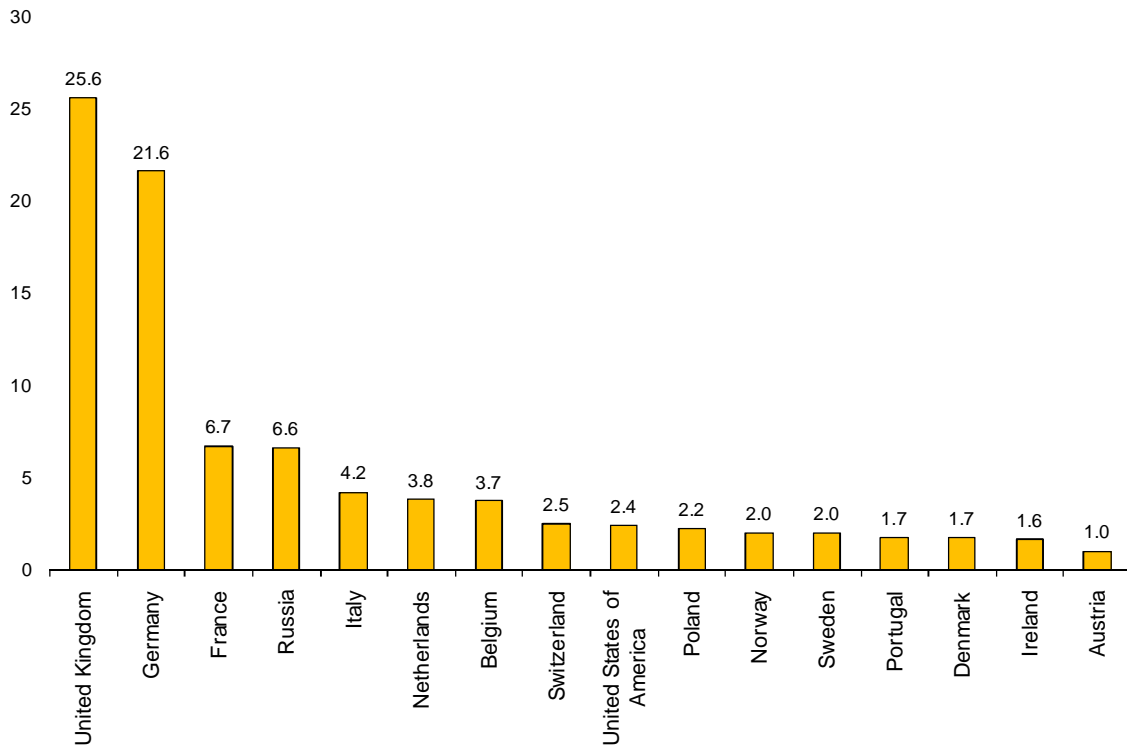
The tourist sites with the highest number of overnight stays were Barcelona, Calvià and Madrid. Eivissa reached the highest occupancy rate by bedplaces (93.6%) and Formentera the highest weekend occupancy rate (93.9%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 25.6% and 21.6%, respectively, of the total of overnight stays in hotel establishments by non-residents in July. The British market experienced a decrease of 3.8% and the German market did so by 7.9%.

Overnight stays of guests from France, Russia and Italy (the following countries of origin) registered annual rates of 9.4%, -11.4% and 1.7%, respectively.

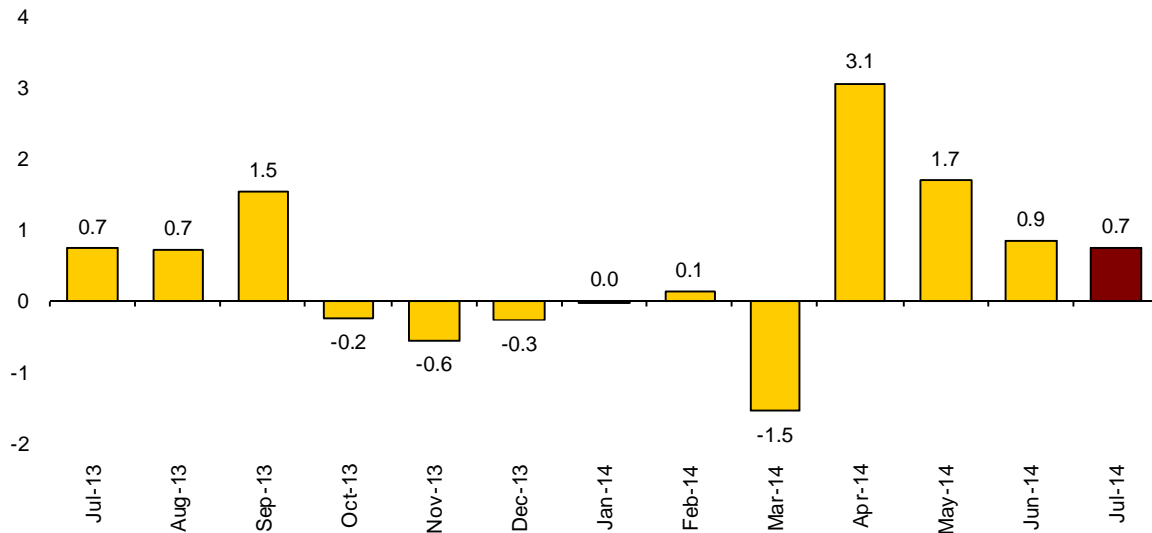
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 0.7% in July, that is, 0.2 points lower than that of the previous month and the same 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 July (together they represented 76.8% of the total weight). Hotel prices increased 3.3% in the annual rate in Andalucía and 1.3% in Illes Balears. In turn, hotel prices decreased 0.7% in Cataluña and 0.2% in Canarias.

By hotel category, the increases in hotel prices were registered in three and two-silver-star hotels (6.7%), two-golden-star hotels (4.0%), three-golden-star hotels (0.9%), five-golden-star hotels (0.8%) and four-golden-star hotels (0.2%).

In turn, the prices registered a decrease in one-silver-star establishments (3.2%).

Prices in one-golden-star establishments remained unchanged, as compared with the same month of 2013.

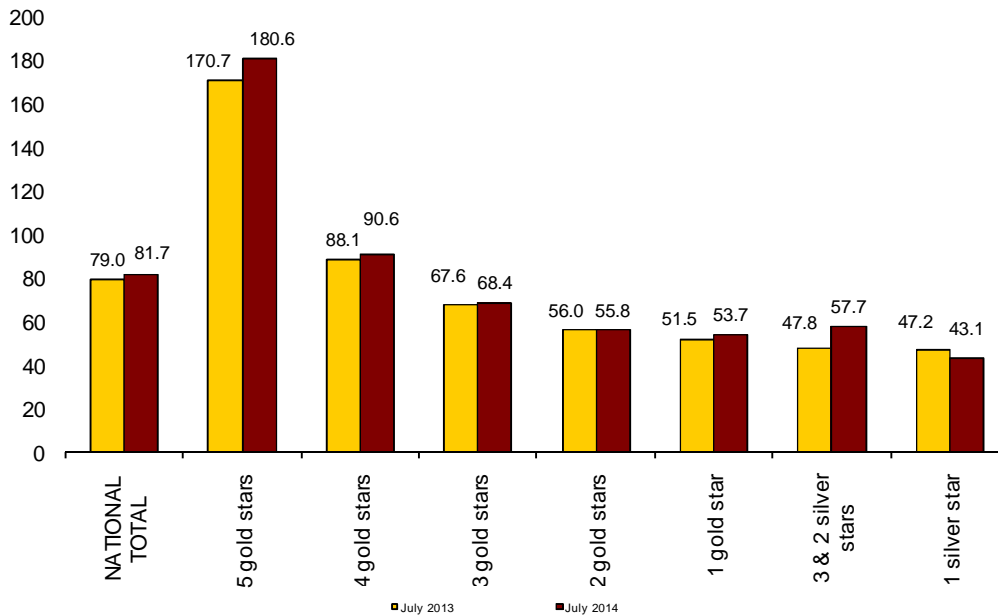
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in July was 81.7 euros, which represented an increase of 3.4% as compared with the same month of 2013.

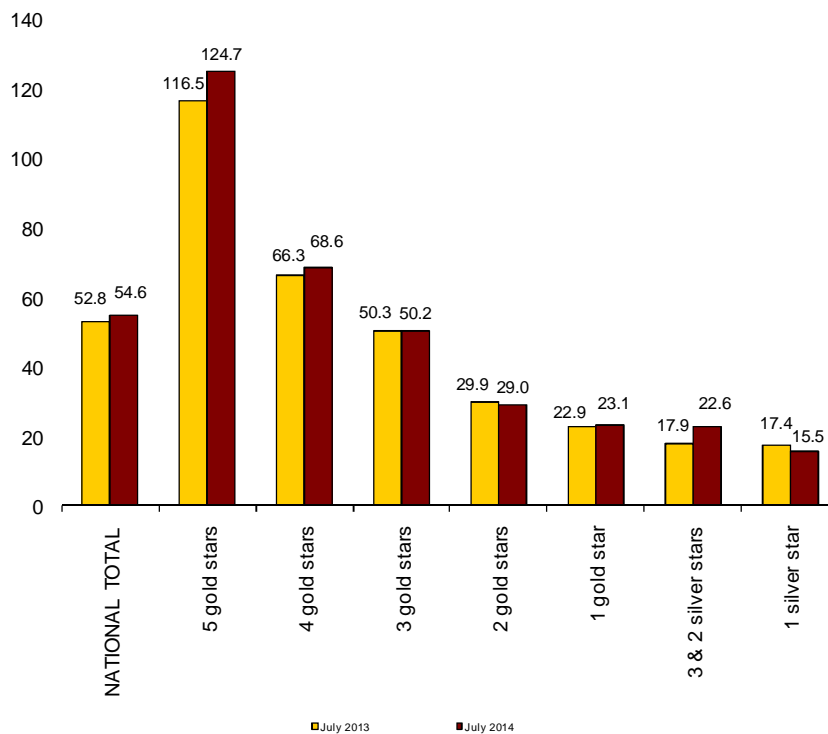
In turn, the daily average revenue per available room (RevPAR), that is conditioned by the occupancy registered in hotel establishments, reached 54.6 euros, with an increase of 3.3%.

By category, the average invoicing was 180.6 euros for five-star hotels, 90.6 euros for four-star hotels and 68.4 euros for three-star hotels. Income per available room for the same categories was 124.7, 68.6 and 50.2 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)

July 2014

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	9,879,879	4,785,314	5,094,564	37,587,363	12,862,375	24,724,988	3.80
HOTELS: Golden stars							
Five	470,385	157,719	312,666	1,744,871	406,783	1,338,088	3.71
Four	4,339,462	2,079,966	2,259,497	17,583,129	6,038,086	11,545,043	4.05
Three	3,006,593	1,352,505	1,654,087	13,109,714	3,864,415	9,245,299	4.36
Two	789,737	461,810	327,927	2,151,736	1,016,161	1,135,575	2.72
One	316,546	198,293	118,253	737,486	401,637	335,849	2.33
INNS: Silver stars							
Two and three	504,758	302,899	201,859	1,230,013	616,065	613,948	2.44
One	452,397	232,121	220,276	1,030,414	519,228	511,186	2.28
Annual rate	2.44	3.52	1.45	-0.22	2.91	-1.77	-2.60
Cumulative annual rate	4.14	4.28	4.00	2.77	3.05	2.62	-1.32

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

Category	Estimated open establishments	Estimated bed-places	Occupancy rate			Employed personnel
			Of bed-places	Of bed-places at weekend	Of bedrooms	
TOTAL	16,820	1,761,797	65.63	69.87	66.75	237,794
HOTELS: Golden stars						
Five	270	83,533	65.59	70.91	68.98	26,704
Four	2,361	736,515	73.14	76.61	75.81	111,116
Three	3,024	545,874	73.21	76.56	73.25	65,152
Two	2,171	137,568	49.26	57.33	51.66	12,909
One	1,382	58,321	40.21	46.92	42.91	5,348
INNS: Silver stars						
Two and three	3,321	104,406	37.35	43.72	39.37	9,058
One	4,292	95,581	34.53	39.51	35.97	7,506
Annual rate	-0.78	0.17	0.43	-0.46	-0.04	1.46

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 Lanzarote	38,179	83,910	242,450	774,805	89.83	80.86	90.04	8.33	5,635
Isla de Mallorca	66,865	1,013,210	301,857	6,935,228	87.60	86.71	86.44	6.70	36,024
Palma - Calvià	35,502	430,230	140,015	2,601,462	86.99	87.75	88.10	5.89	13,706
Isla de Menorca	29,187	84,484	151,326	664,784	85.34	82.57	88.52	7.18	3,952
Islas de Ibiza-Formentera	42,201	256,629	178,215	1,478,471	84.62	87.31	85.22	5.54	9,838
Isla de Fuerteventura	22,276	122,847	128,465	1,140,534	83.23	81.03	83.84	8.74	7,743
Costa de Gipuzkoa	29,777	43,517	63,726	101,922	80.39	87.11	84.86	2.26	1,223
Costa Blanca	247,559	148,395	1,020,334	783,017	79.60	86.07	77.37	4.55	9,686

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

Costa del Sol	244,011	238,209	869,894	1,283,945	74.46	78.96	77.88	4.47	13,099
Isla de Tenerife	90,170	202,883	379,743	1,688,292	74.13	76.43	75.95	7.06	15,698
Barcelona	137,902	570,945	266,764	1,670,907	78.93	81.14	84.55	2.73	12,998
Costa Brava	146,193	276,129	373,681	1,452,468	68.09	73.93	68.30	4.32	9,123
Costa Daurada	152,981	172,253	507,752	1,174,498	77.34	81.12	80.02	5.17	6,874
Sur de Tenerife	48,188	171,513	216,498	1,458,288	78.28	80.02	81.46	7.62	12,435
Isla de Gran Canaria	72,575	133,229	290,259	1,115,893	73.69	73.94	74.46	6.83	10,291
Sur de Gran Canaria	50,670	125,035	235,428	1,086,346	78.16	77.89	78.57	7.52	9,327

Tourist site with a greater occupancy rate per month

Eivissa	11,981	55,516	38,569	267,510	93.58	90.70	91.90	4.53	2,124
Yaiza	16,087	43,326	107,116	398,732	92.83	82.33	93.06	8.51	2,777
Santanyí	2,338	50,760	10,085	390,238	92.78	93.09	92.14	7.54	1,842
Ciutadella de Menorca	12,424	37,090	79,041	303,998	92.25	86.62	89.27	7.74	1,624
Santa Margalida	1,175	49,815	6,907	406,408	91.91	89.78	87.89	8.11	1,800
Teguise	7,771	18,489	49,723	174,934	91.30	83.91	90.53	8.56	1,179
Alcúdia	2,657	71,063	18,965	556,498	90.86	89.67	90.52	7.81	2,789
Formentera	8,754	18,442	34,542	108,940	90.00	93.89	87.49	5.28	764
Sant Llorenç des Cardassar	2,727	74,373	14,055	629,975	89.01	83.30	86.38	8.35	2,932
Llucmajor	7,557	53,527	40,244	310,505	88.00	86.33	75.90	5.74	1,408

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

Barcelona	123,690	545,293	238,405	1,599,704	79.68	81.76	85.27	2.75	12,586
Calvià	8,505	209,770	46,105	1,466,547	86.86	85.54	87.90	6.93	6,694
Madrid	348,748	360,091	594,453	774,514	55.41	62.58	64.06	1.93	10,625
Benidorm	126,204	82,645	657,565	541,472	87.76	91.94	84.12	5.74	5,726
Palma	23,767	204,143	83,096	1,060,314	86.06	89.45	88.39	5.02	6,457
San Bartolomé de Tirajana	40,044	88,536	191,026	781,175	77.13	76.63	78.02	7.56	7,249
Salou	52,436	102,468	199,515	764,075	81.51	86.29	86.30	6.22	3,483
Lloret de Mar	24,182	121,772	75,837	808,040	78.47	81.92	77.68	6.06	2,932
Adeje	21,832	87,500	104,172	764,194	77.14	80.39	82.98	7.94	6,866
Pájara	12,794	77,000	89,002	740,493	86.72	84.86	85.27	9.24	5,514

* 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	9,879,879	100.00	37,587,363	100.00
Residents in Spain	4,785,314	48.43	12,862,375	34.22
Residents abroad	5,094,564	51.57	24,724,988	65.78
Total Residents abroad	5,094,564	100.00	24,724,988	100.00
Total Residents in E.U. (without Spain)	3,671,947	72.08	19,470,955	78.75
- Germany	797,504	15.65	5,344,488	21.62
- Austria	47,384	0.93	250,089	1.01
- Belgium	173,603	3.41	912,709	3.69
- Denmark	75,970	1.49	414,204	1.68
- Finland	32,726	0.64	133,581	0.54
- France	494,108	9.70	1,656,124	6.70
- Greece	9,747	0.19	27,638	0.11
- Ireland	74,924	1.47	391,491	1.58
- Italy	268,169	5.26	1,045,353	4.23
- Luxembourg	9,637	0.19	48,723	0.20
- Netherlands	191,478	3.76	939,050	3.80
- Poland	96,305	1.89	532,917	2.16
- Portugal	125,068	2.45	416,574	1.68
- United Kingdom	1,061,544	20.84	6,338,198	25.63
- Czech Republic	26,897	0.53	158,905	0.64
- Sweden	97,766	1.92	487,033	1.97
- Other EU countries*	89,117	1.75	373,877	1.51
Norway	90,383	1.77	505,040	2.04
Russia	223,406	4.39	1,631,860	6.60
Switzerland	119,338	2.34	604,789	2.45
Rest of Europe	93,815	1.84	398,181	1.61
Japan	47,210	0.93	88,666	0.36
United States of America	252,907	4.96	594,056	2.40
Rest of America	255,880	5.02	617,421	2.50
Africa	40,266	0.79	86,586	0.35
Other countries	299,412	5.88	727,433	2.94

*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 2014

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	96.7	0.7
Andalucía	91.7	3.3
Aragón	57.6	1.5
Asturias, Principado de	84.3	-3.4
Balears, Illes	112.2	1.3
Canarias	102.4	-0.2
Cantabria	83.7	-3.2
Castilla y León	87.6	0.3
Castilla - La Mancha	84.3	-0.5
Cataluña	96.6	-0.7
Comunitat Valenciana	92.6	1.9
Extremadura	89.5	3.8
Galicia	88.7	-0.2
Madrid, Comunidad de	75.2	-1.2
Murcia, Región de	77.1	-1.0
Navarra, Comunidad Foral de	83.8	-0.1
País Vasco	98.2	2.9
Rioja, La	83.7	1.4
Ceuta	114.3	3.9
Melilla	96.0	0.6

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	96.7	0.7
HOTELS: Gold stars		
Five	91.5	0.8
Fourth	94.5	0.2
Three	99.9	0.9
Two	99.7	4.0
One	103.1	0.0
HOSTALS: Silver stars		
Three and two	99.9	6.7
One	94.9	-3.2

Indicators on the Profitability of the Hotel Sector

July 2014

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	81.7	3.4	54.6	3.3
Andalucía	90.7	6.1	56.7	6.9
Aragón	52.2	3.3	18.5	5.6
Asturias, Principado de	58.7	-1.2	28.3	-2.7
Balears, Illes	89.7	4.2	77.8	0.8
Canarias	80.3	5.0	62.8	8.4
Cantabria	68.6	0.9	36.0	-2.9
Castilla y León	53.4	1.7	21.0	7.0
Castilla - La Mancha	54.2	2.3	15.4	7.2
Cataluña	85.4	1.8	61.1	-1.7
Comunitat Valenciana	75.9	3.6	52.2	2.7
Extremadura	53.1	0.7	17.1	2.7
Galicia	57.5	4.8	24.0	6.7
Madrid, Comunidad de	69.8	-1.1	41.7	10.0
Murcia, Región de	71.7	1.2	38.8	12.5
Navarra, Comunidad Foral de	77.8	0.6	35.3	2.8
País Vasco	85.7	3.4	58.1	3.8
Rioja, La	58.7	1.9	28.7	12.0
Ceuta	77.4	11.3	44.1	5.5
Melilla	63.6	-4.7	34.7	30.8

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	81.7	3.4	54.6	3.3
HOTELS: Gold stars				
Five	180.6	5.9	124.7	7.1
Four	90.6	2.8	68.6	3.5
Three	68.4	1.2	50.2	-0.3
Two	55.8	-0.4	29.0	-3.1
One	53.7	4.4	23.1	1.0
GUESTHOUSES: Silver stars				
Three and two	57.7	20.7	22.6	26.3
One	43.1	-8.7	15.5	-10.8

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