

24 August 2015

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
July 2015. *Provisional data*

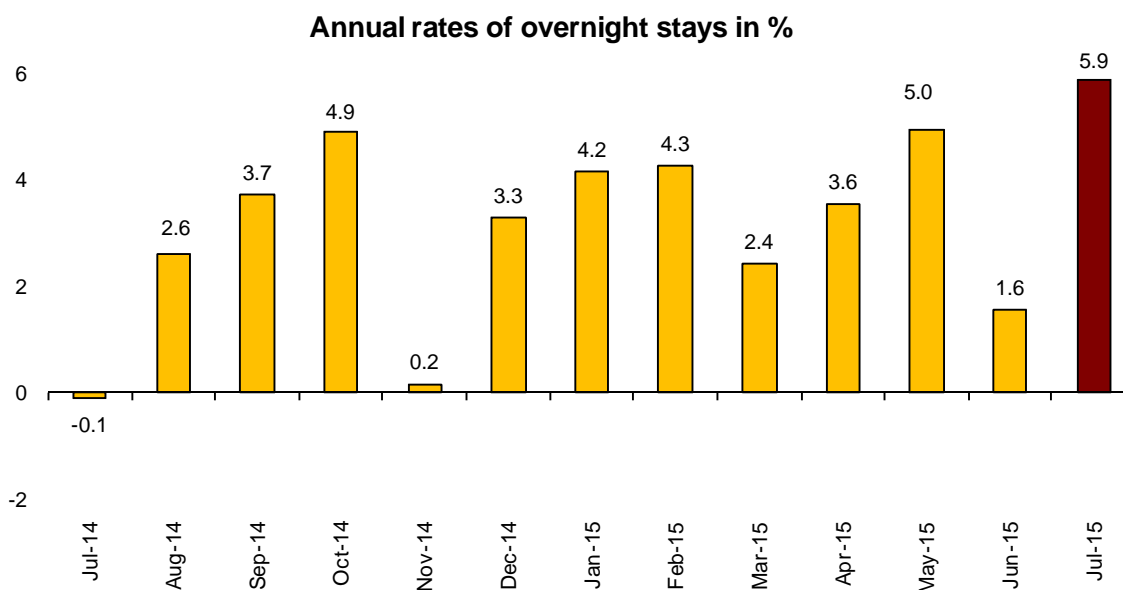
Overnight stays in hotel establishments register an increase of 5.9% in July, as compared to the same month of 2014

Hotels invoice an average of 87.8 euros per occupied room, which means an annual increase of 8.0%

In July, a total of 39.8 million overnight stays were registered in hotel establishments, 5.9% more than in the same month of 2014. Overnight stays for residents in Spain increased by 7.0%, whereas those of non-residents did so by 5.3%.

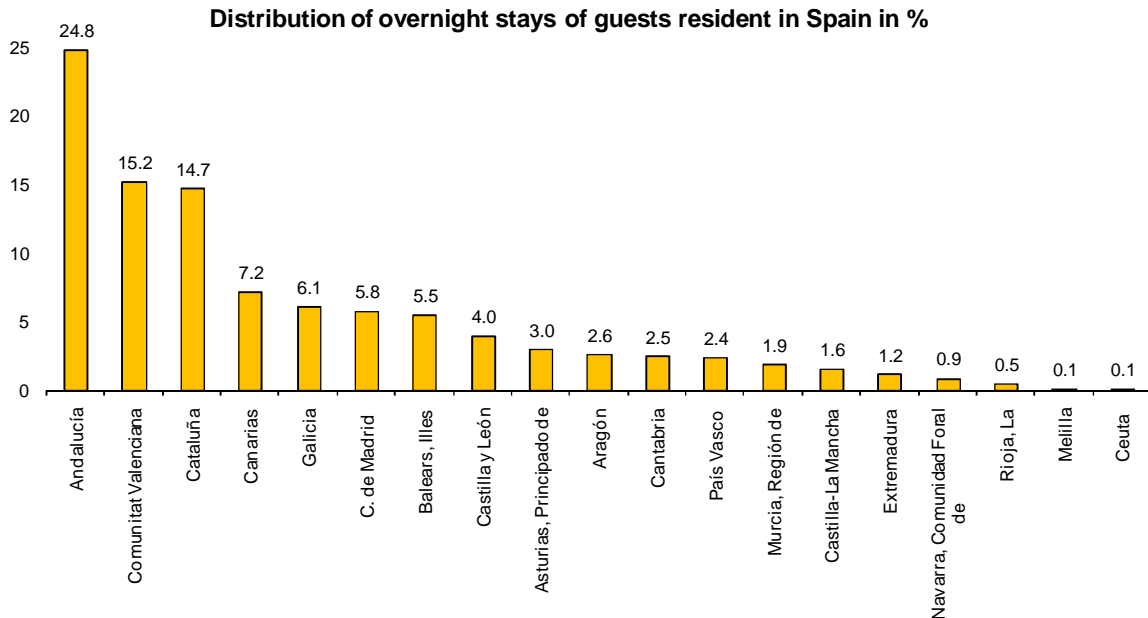
The average stay decreased 1.2%, as compared to July 2014, standing at 3.8 nights per guest.

During the first seven months of 2015, overnight stays increased 3.9%, as compared to the same period of the previous year.

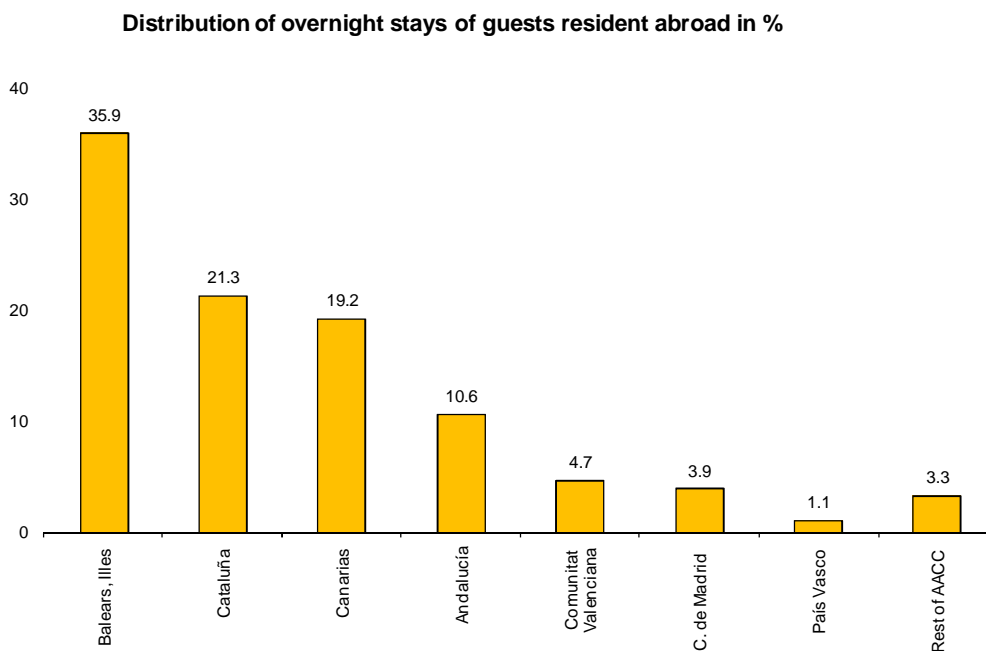


Main destinations

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 5.3%, 6.3%, 17.3% and -9.8%, respectively.



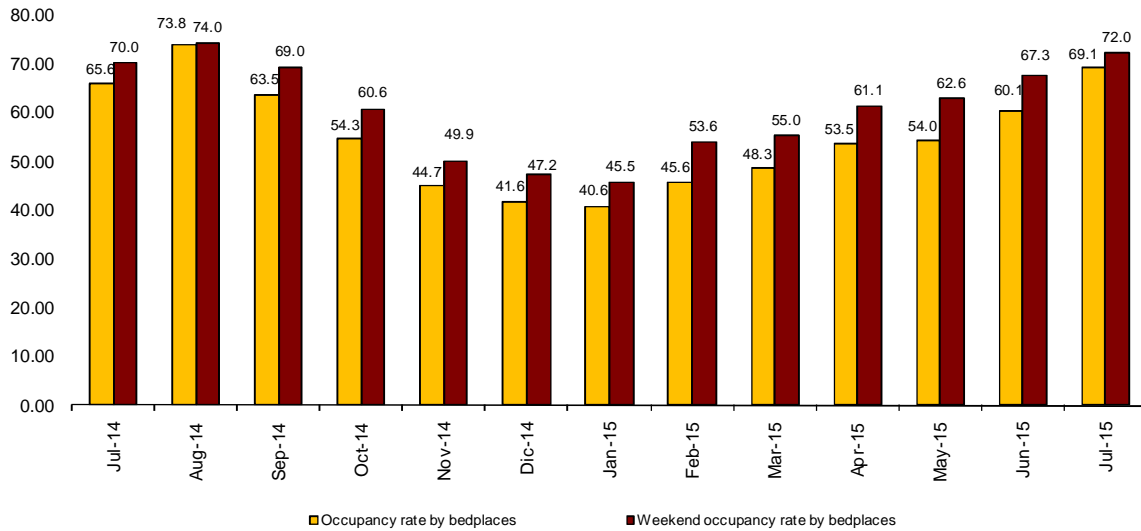
The main destination chosen by non-residents was Illes Balears, with 35.9% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 3.2% as compared to July 2014. The following destinations of non-residents were Cataluña (21.3% of the total and a decrease of 0.1%) and Canarias (19.2% and an increase of 6.2% in overnight stays).



Hotel Occupancy

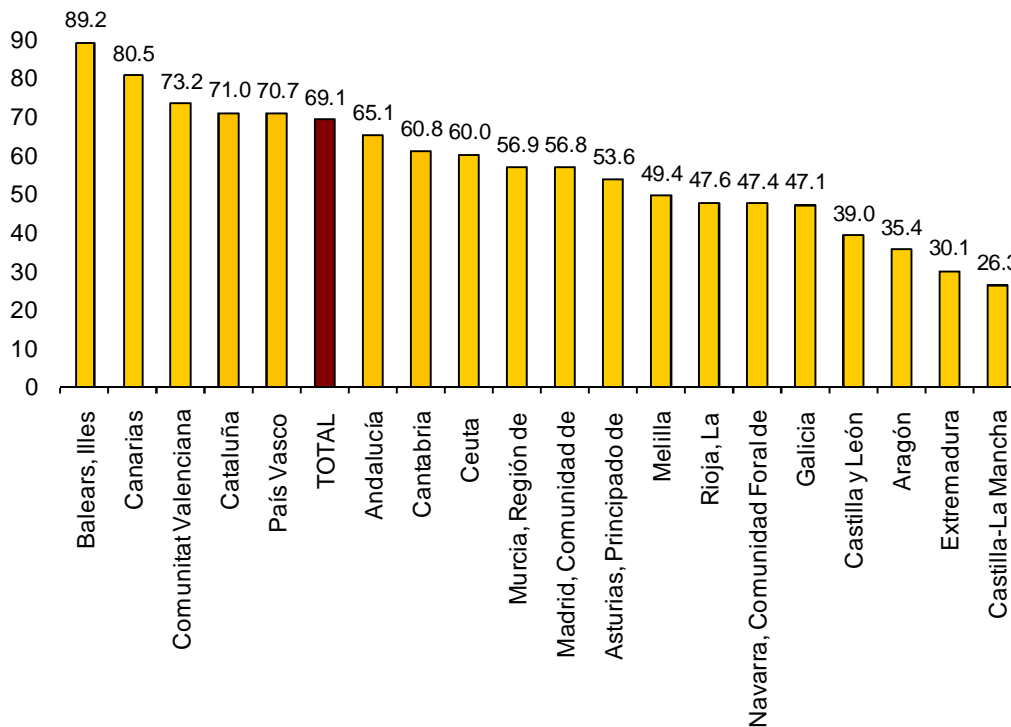
In July, 69.1% of the available bedplaces were occupied, indicating an annual increase of 5.3%. The weekend occupancy rate by bedplaces increased by 2.9%, standing at 72.0%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears registered the greatest occupancy rate by bedplaces in July (89.2%), followed by Canarias (80.5%) and Comunitat Valenciana (73.2%).

Occupancy rate by bedplaces by Autonomous Community



By tourist area, the island of Lanzarote registered the highest occupancy rate by bedplaces (90.6%), while Costa de Gipuzkoa recorded the highest weekend occupancy rate (89.3%). The island of Mallorca recorded the highest number of overnight stays, with more than 7.4 million.

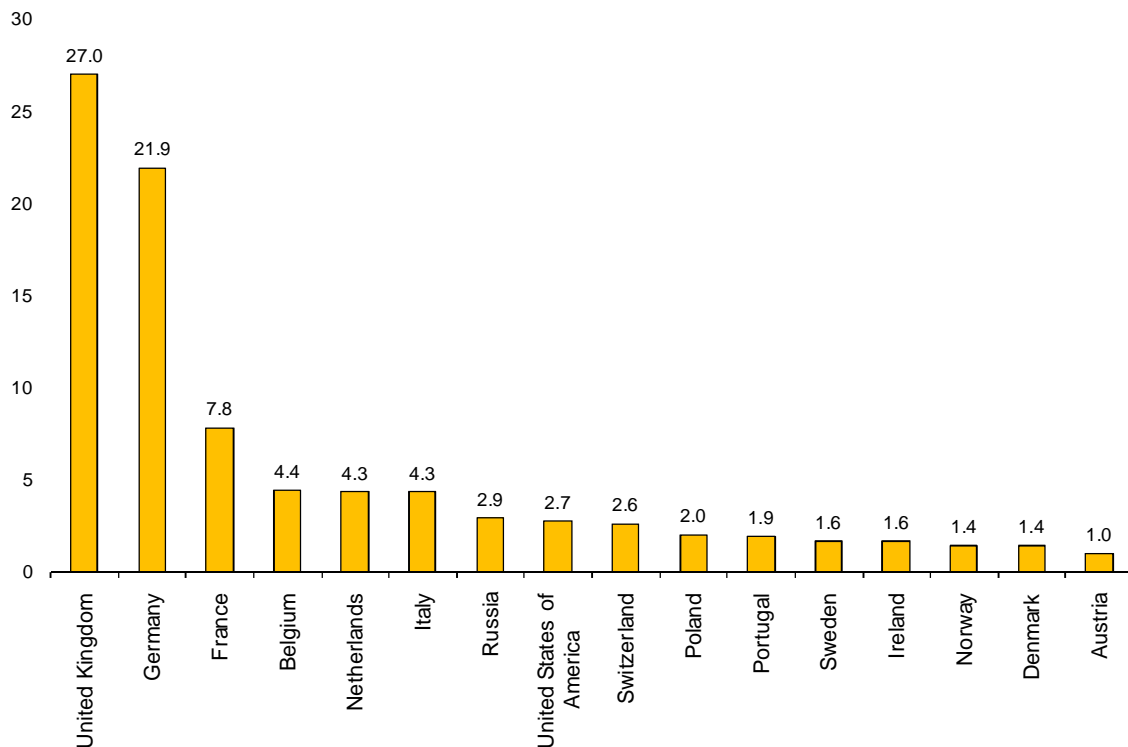
The tourist sites with the highest number of overnight stays were Barcelona, Calvià and Madrid. Lluçmajor reached both the highest occupancy rate by bedplaces (95.4%) and the greatest weekend occupancy rate (94.7%).

Overnight stays according to the country of origin of the guests

Guests from United Kingdom and Germany concentrated 27.0% and 21.9%, respectively, of the total of overnight stays in hotel establishments by non-residents in July. The British market increased by 9.8% and the German one did so by 8.4%.

Overnight stays of guests from France, Belgium and Netherlands (the following countries of origin) registered annual rates of 17.5%, 22.8% and 16.0%, respectively.

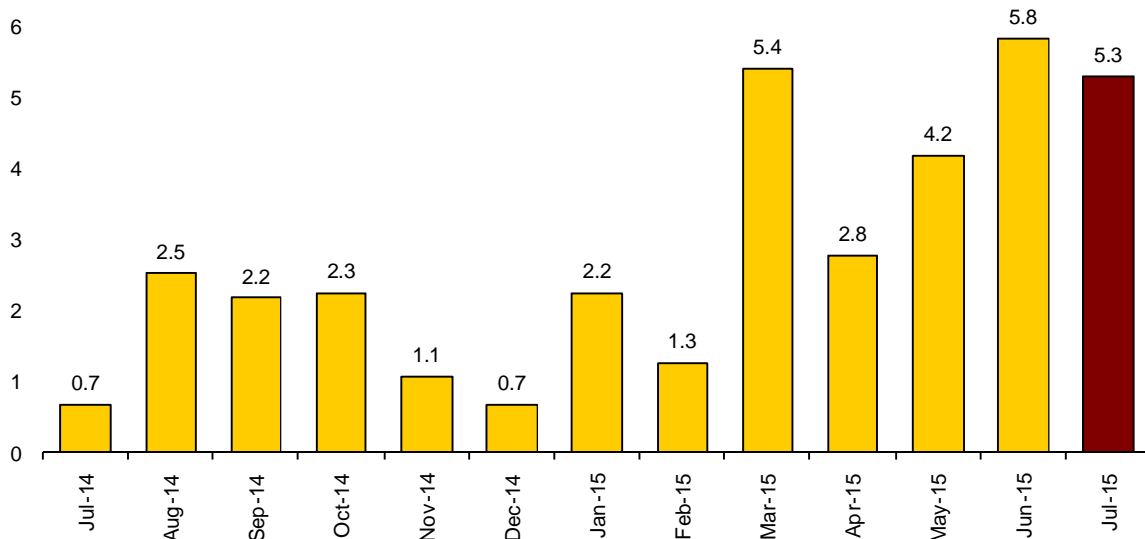
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 5.3% in July, that is, 0.5 points below that of the previous month and 4.6 points over 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 (they represented 76.3% of the total). Hotel prices increased 6.7% in the annual rate in Cataluña, 5.9% in Andalucía, 4.8% in Canarias and 4.7% in Illes Balears.

By hotel category, prices increased in all categories. In three-golden-star establishments (7.1%), five-golden-star establishments (6.3%), three and two-silver-star establishments (5.7%), two-golden-star establishments (5.3%), four-golden-star establishments (4.1%), one-golden-star establishments (3.6%), and one-silver-star establishments (2.9%).

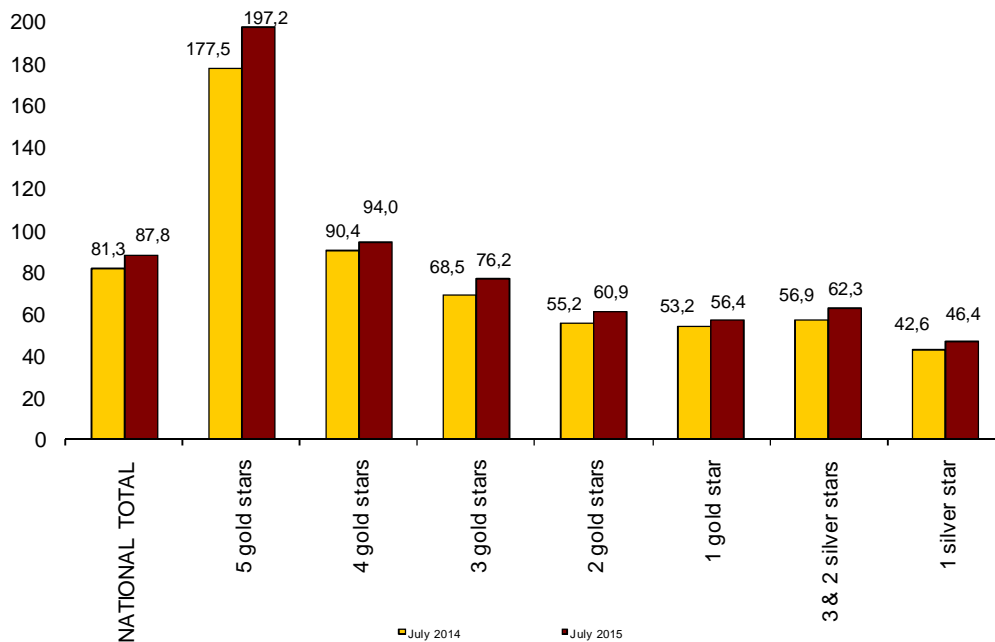
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in July was 87.8 euros, which represented an increase of 8.0% as compared to the same month of 2014.

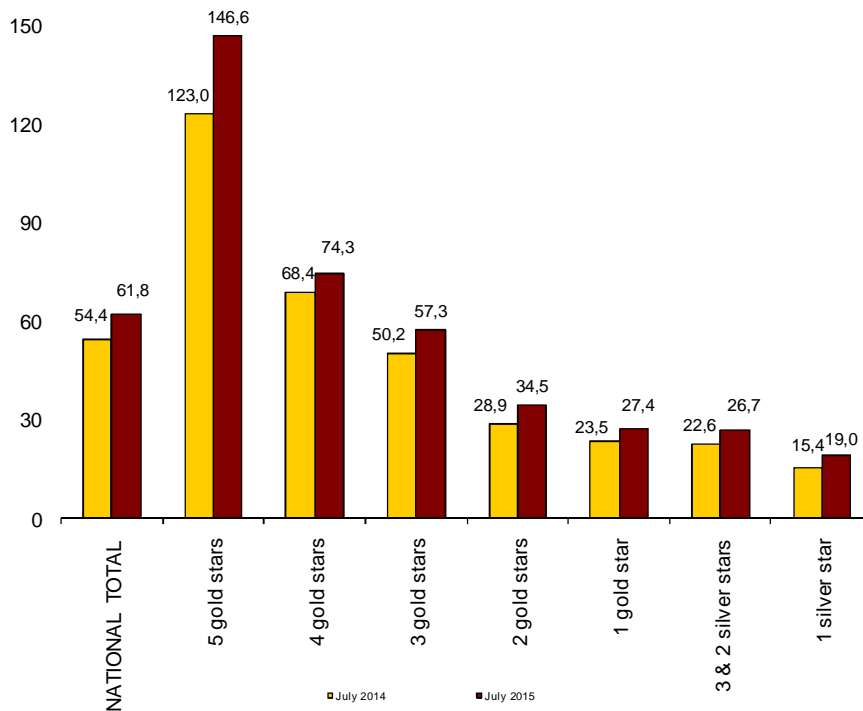
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 61.8 euros, with an increase of 13.6%.

By category, the average invoicing was 197.2 euros for five-star hotels, 94.0 euros for four-star hotels and 76.2 euros for three-star hotels. Income per available room for the same categories was 146.6, 74.3, and 57.3 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)

July 2015

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	10,595,557	5,152,686	5,442,871	39,862,460	13,846,448	26,016,012	3.76
HOTELS: Golden stars							
Five	514,102	157,679	356,423	1,998,602	402,570	1,596,033	3.89
Four	4,674,170	2,208,890	2,465,280	19,130,823	6,518,648	12,612,174	4.09
Three	3,144,248	1,453,700	1,690,548	13,202,260	4,105,020	9,097,240	4.20
Two	816,711	485,798	330,913	2,286,182	1,113,479	1,172,703	2.80
One	357,965	220,517	137,448	822,483	443,390	379,093	2.30
INNS: Silver stars							
Two and three	563,992	344,461	219,531	1,300,906	676,616	624,291	2.31
One	524,368	281,641	242,727	1,121,204	586,725	534,479	2.14
Annual rate	7.18	7.38	7.00	5.90	6.98	5.33	-1.20
Cumulative annual rate	5.98	6.74	5.19	3.92	6.60	2.46	-1.94

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	16,702	850,359	1,766,110	69.07	71.96	70.21	246,761
HOTELS: Golden stars							
Five	279	42,276	87,782	70.07	73.94	74.29	30,205
Four	2,410	349,344	754,091	77.14	78.85	79.37	116,828
Three	3,005	255,293	534,638	75.09	76.88	75.39	65,297
Two	2,166	69,270	134,382	53.35	60.77	55.58	12,754
One	1,373	30,124	58,629	44.71	52.69	47.78	5,348
INNS: Silver stars							
Two and three	3,309	54,095	103,908	39.90	45.99	42.03	8,945
One	4,161	49,957	92,679	38.66	43.18	40.64	7,385
Annual rate	-1.03	-0.40	0.11	5.25	2.87	5.10	4.50

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									
Isla de Lanzarote	28,124	90,676	161,116	903,272	90.59	82.53	90.99	8.96	5,942
Isla de Mallorca	82,759	1,020,705	364,689	7,112,768	90.03	87.48	88.12	6.78	37,287
Palma - Calvià	41,775	415,615	178,658	2,523,141	88.41	86.01	86.96	5.91	14,392
Isla de Menorca	43,100	98,963	208,769	663,497	87.90	83.72	93.41	6.14	4,340
Islas de Ibiza-Formentera	44,965	273,406	182,848	1,552,773	86.54	85.87	86.13	5.45	11,367
Costa de Gipuzkoa	35,524	44,320	76,216	108,749	86.47	89.26	89.46	2.32	1,201
Isla de Fuerteventura	22,777	115,583	127,987	1,108,325	85.42	82.81	86.87	8.94	6,894
Costa Blanca	256,653	154,762	1,068,538	853,821	83.20	87.81	80.34	4.67	9,510

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

Costa del Sol	239,620	274,612	813,666	1,486,283	79.26	82.44	82.70	4.47	13,423
Isla de Tenerife	96,195	204,368	393,735	1,687,758	76.95	77.52	77.07	6.93	16,123
Barcelona	139,542	595,675	279,273	1,747,514	80.99	81.41	87.87	2.76	13,886
Costa Brava	180,132	295,053	485,596	1,500,461	71.15	76.97	71.19	4.18	9,663
Costa Daurada	202,703	183,842	676,382	1,048,230	73.66	74.28	78.59	4.46	6,450
Sur de Tenerife	52,467	174,829	230,126	1,492,110	82.09	81.64	83.32	7.58	13,016
Isla de Gran Canaria	67,383	140,469	271,247	1,234,135	78.13	76.56	78.77	7.24	10,831
Costa Barcelona	125,977	227,731	291,067	1,138,433	73.16	72.30	73.71	4.04	6,985

Tourist site with a greater occupancy rate per month

Llucmajor	8,739	51,108	45,654	358,388	95.44	94.71	83.75	6.75	1,485
Muro	4,686	52,171	30,079	435,497	95.19	82.90	91.15	8.19	2,631
Alcúdia	3,019	77,395	15,012	594,235	94.38	92.62	94.22	7.58	3,109
Sant Llorenç des Cardassar	4,026	75,483	19,113	694,491	92.35	91.19	90.71	8.98	3,209
Ciutadella de Menorca	14,502	37,139	83,630	301,985	91.99	90.95	95.06	7.47	1,796
Formentera	7,274	19,865	27,229	123,856	91.44	89.66	92.48	5.57	808
Santa Margalida	1,271	48,959	6,795	401,025	91.26	88.08	84.98	8.12	1,716
Yaiza	13,625	39,932	83,048	420,731	90.51	80.42	90.50	9.41	2,891
Son Servera	2,477	37,581	6,656	303,198	90.46	90.33	94.58	7.74	1,391
Benidorm	122,712	87,584	642,908	618,487	90.10	91.76	85.88	6.00	5,443

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

Barcelona	124,002	571,603	247,981	1,671,667	81.37	81.37	88.02	2.76	13,329
Calvià	10,545	216,941	46,829	1,419,775	86.69	84.68	86.17	6.45	7,205
Madrid	336,660	402,401	552,786	904,097	59.99	64.46	67.34	1.97	10,539
Palma	28,198	190,419	115,891	1,044,542	89.44	87.41	87.98	5.31	6,474
San Bartolomé de Tirajana	35,031	97,688	177,711	884,183	82.56	81.36	82.49	8.00	7,836
Salou	82,614	101,508	272,698	707,180	78.31	78.07	82.54	5.32	3,204
Adeje	25,692	95,601	118,650	804,487	85.25	86.12	86.26	7.61	7,150
Lloret de Mar	31,420	119,625	92,781	774,790	76.11	79.23	75.75	5.74	2,888
Pájara	11,719	70,648	66,488	684,456	85.65	83.50	85.27	9.12	4,287
Torremolinos	60,310	50,844	237,304	345,351	85.02	88.57	83.52	5.24	2,732

* 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	10,595,557	100.00	39,862,460	100.00
Residents in Spain	5,152,686	48.63	13,846,448	34.74
Residents abroad	5,442,871	51.37	26,016,012	65.26
Total Residents abroad	5,442,871	100.00	26,016,012	100.00
Total Residents in E.U. (without Spain)	3,996,018	73.42	21,342,928	82.04
- Germany	849,642	15.61	5,699,225	21.91
- Austria	52,915	0.97	263,707	1.01
- Belgium	211,614	3.89	1,140,964	4.39
- Denmark	73,679	1.35	366,900	1.41
- Finland	27,330	0.50	100,414	0.39
- France	595,793	10.95	2,021,558	7.77
- Greece	9,868	0.18	25,942	0.10
- Ireland	78,737	1.45	420,869	1.62
- Italy	290,184	5.33	1,107,835	4.26
- Luxembourg	8,805	0.16	48,296	0.19
- Netherlands	226,002	4.15	1,108,007	4.26
- Poland	97,334	1.79	521,268	2.00
- Portugal	140,314	2.58	486,290	1.87
- United Kingdom	1,119,035	20.56	7,026,409	27.01
- Czech Republic	32,407	0.60	187,565	0.72
- Sweden	90,695	1.67	426,197	1.64
- Other EU countries*	91,664	1.68	391,481	1.50
Norway	74,376	1.37	370,739	1.43
Russia	116,292	2.14	748,957	2.88
Switzerland	126,347	2.32	664,228	2.55
Rest of Europe	96,639	1.78	410,137	1.58
Japan	42,056	0.77	81,250	0.31
United States of America	289,019	5.31	689,977	2.65
Rest of America	280,944	5.16	684,591	2.63
Africa	57,270	1.05	144,336	0.55
Other countries	363,910	6.69	878,869	3.38

*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 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	101.8	5.3
Andalucía	96.6	5.9
Aragón	59.8	3.6
Asturias, Principado de	89.2	6.1
Balears, Illes	117.8	4.7
Canarias	106.6	4.8
Cantabria	88.9	5.0
Castilla y León	88.4	1.0
Castilla - La Mancha	84.6	0.2
Cataluña	103.0	6.7
Comunitat Valenciana	97.4	5.2
Extremadura	90.7	2.3
Galicia	91.0	2.7
Madrid, Comunidad de	79.9	6.1
Murcia, Región de	79.7	3.5
Navarra, Comunidad Foral de	89.7	6.8
País Vasco	102.6	4.0
Rioja, La	87.7	4.8
Ceuta	109.7	-5.5
Melilla	98.4	2.4

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	101.8	5.3
HOTELS: Gold stars		
Five	96.1	6.3
Fourth	98.3	4.1
Three	107.1	7.1
Two	104.1	5.1
One	107.8	3.6
HOSTALS: Silver stars		
Three and two	106.0	5.7
One	100.8	2.9

Indicators on the Profitability of the Hotel Sector

July 2015

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	87.8	8.0	61.8	13.6
Andalucía	93.8	3.7	63.6	12.4
Aragón	53.7	2.9	20.3	9.6
Asturias, Principado de	61.5	4.4	35.7	23.4
Balears, Illes	101.2	13.5	89.0	15.0
Canarias	85.1	7.6	68.0	10.4
Cantabria	74.0	8.1	47.0	30.0
Castilla y León	54.4	2.2	22.7	8.1
Castilla - La Mancha	52.3	-2.7	15.5	0.6
Cataluña	92.5	8.7	68.7	11.8
Comunitat Valenciana	80.8	6.2	59.0	11.8
Extremadura	55.9	5.1	18.1	8.4
Galicia	59.5	3.9	29.5	22.4
Madrid, Comunidad de	74.1	5.0	48.0	15.1
Murcia, Región de	70.8	-0.4	39.1	6.4
Navarra, Comunidad Foral de	95.4	23.7	47.3	34.0
País Vasco	89.9	5.3	68.0	17.6
Rioja, La	61.4	4.6	31.3	9.1
Ceuta	68.7	-6.4	33.9	-28.3
Melilla	64.4	1.3	34.2	-1.2

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	87.8	8.0	61.8	13.6
HOTELS: Gold stars				
Five	197.2	11.1	146.6	19.1
Four	94.0	4.0	74.3	8.6
Three	76.2	11.2	57.3	14.2
Two	60.9	10.4	34.5	19.3
One	56.4	5.9	27.4	16.5
GUESTHOUSES: Silver stars				
Three and two	62.3	9.5	26.7	17.8
One	46.4	8.9	19.0	23.4

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room