

23 August 2017

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
July 2017 *Provisional data*

Overnight stays in hotel establishments increase 1.6% in July as compared with the same month of 2016

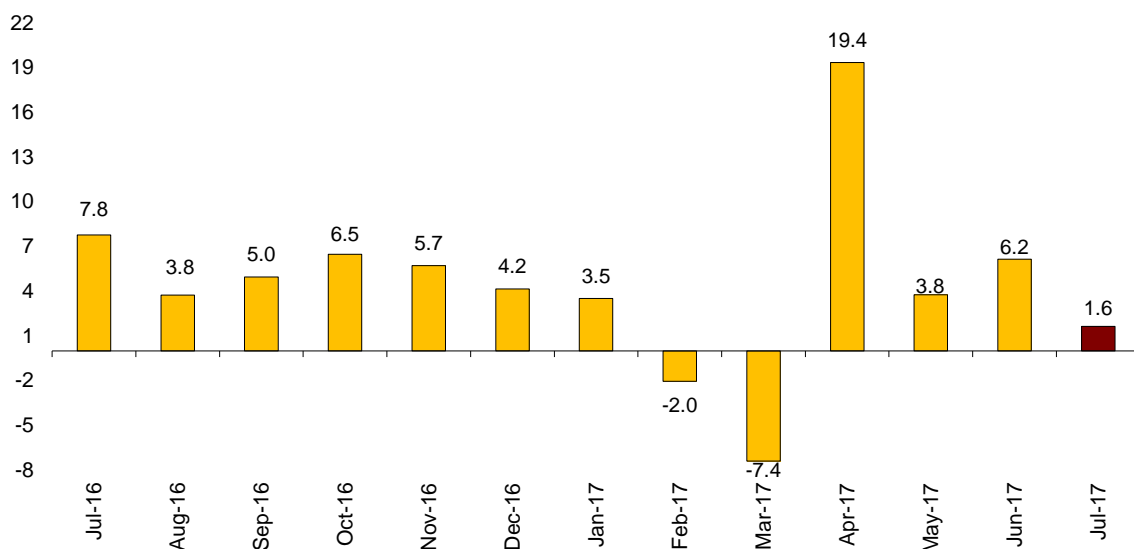
Hotels invoice an average of 98.5 euros per occupied room, which means an annual increase of 6.1%

During the month of July, a total of 43.6 million overnight stays were registered in hotel establishments, 1.6% more than in the same month of 2016. The overnight stays of travellers resident in Spain decreased by 1.9% and those of non-residents increased by 3.5%.

The average stay decreased 0.1% as compared with July 2016, standing at 3.7 overnight stays per traveller.

During the first seven months of 2017, overnight stays increased by 3.8% as compared with the same period of the previous year.

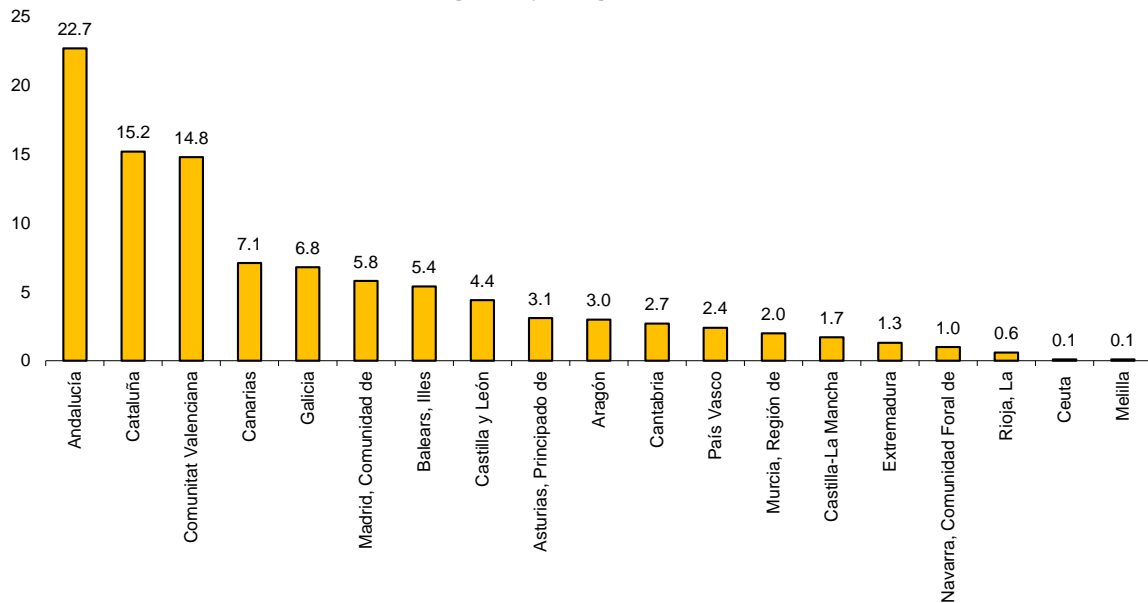
Annual rates of overnight stays in %



Destinations

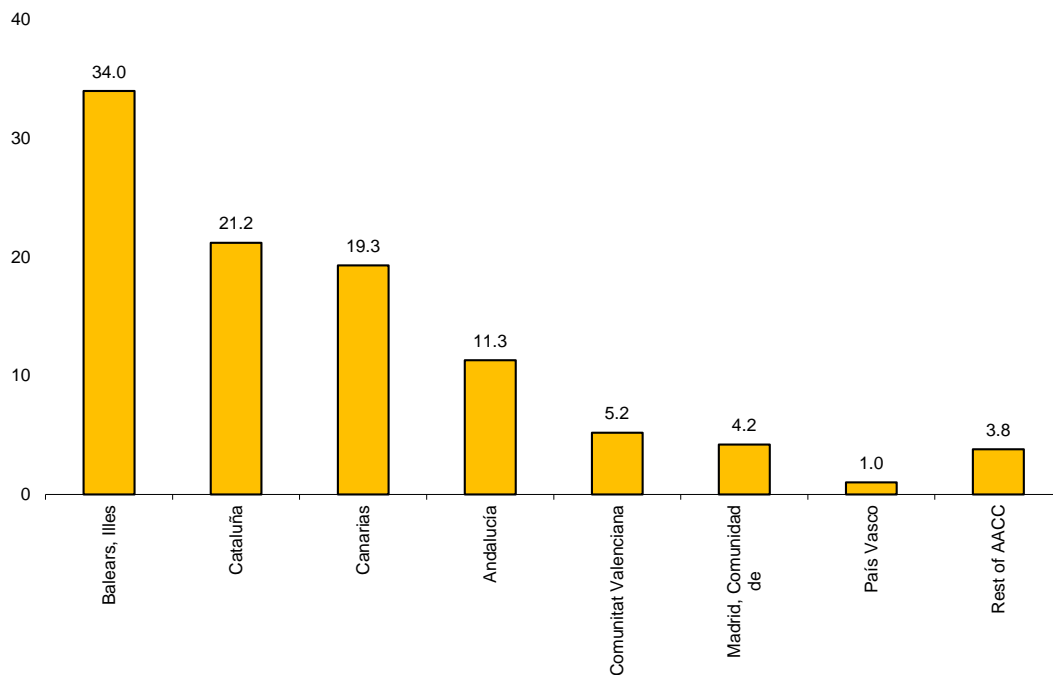
Andalucía, Cataluña, Comunitat Valenciana and Canarias were the main destinations of travellers resident in Spain in July, with annual variation rates in the number of overnight stays of -5.3%, -1.8%, -5.3% and -1.3%, respectively.

Distribution of overnight stays of guests resident in Spain in %



The main destination chosen by non-residents travellers was Illes Balears, with 34.0% of total overnight stays. In this Autonomous Community, overnight stays of foreigners increased by 0.9% as compared to June 2016. The following destinations of non-residents were Cataluña (with 21.2% of the total overnight stays and an increase of 4.6%) and Canarias (with 19.3% of the total and an increase of 1.4%).

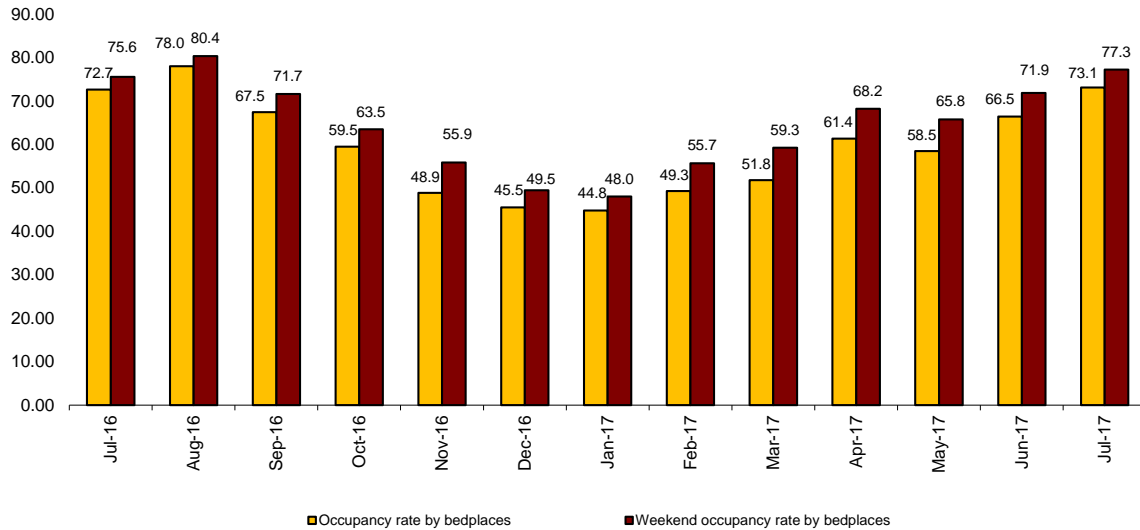
Distribution of overnight stays of guests resident abroad in %



Hotel occupancy

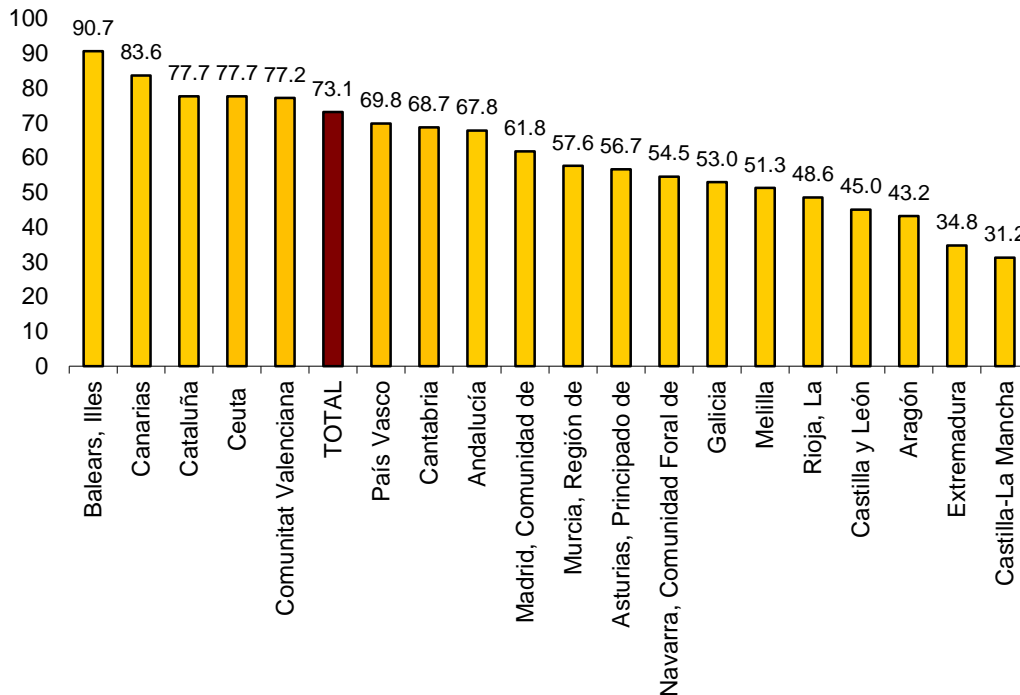
In July, 73.1% of the available bedplaces were occupied, indicating an annual increase of 0.7%. The weekend occupancy rate by bedplaces increased by 2.2%, standing at 77.3%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears showed the highest occupancy rate by bedplaces in July (90.7%). It was followed by Canarias (83.6%) and Cataluña (77.7%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, Palma-Calvià reached both the greatest level of occupancy by bedplaces (92.1%), and the greatest weekend occupancy rate (92.3%). La Costa del Sol registered the highest number of overnight stays, with 2.3 million.

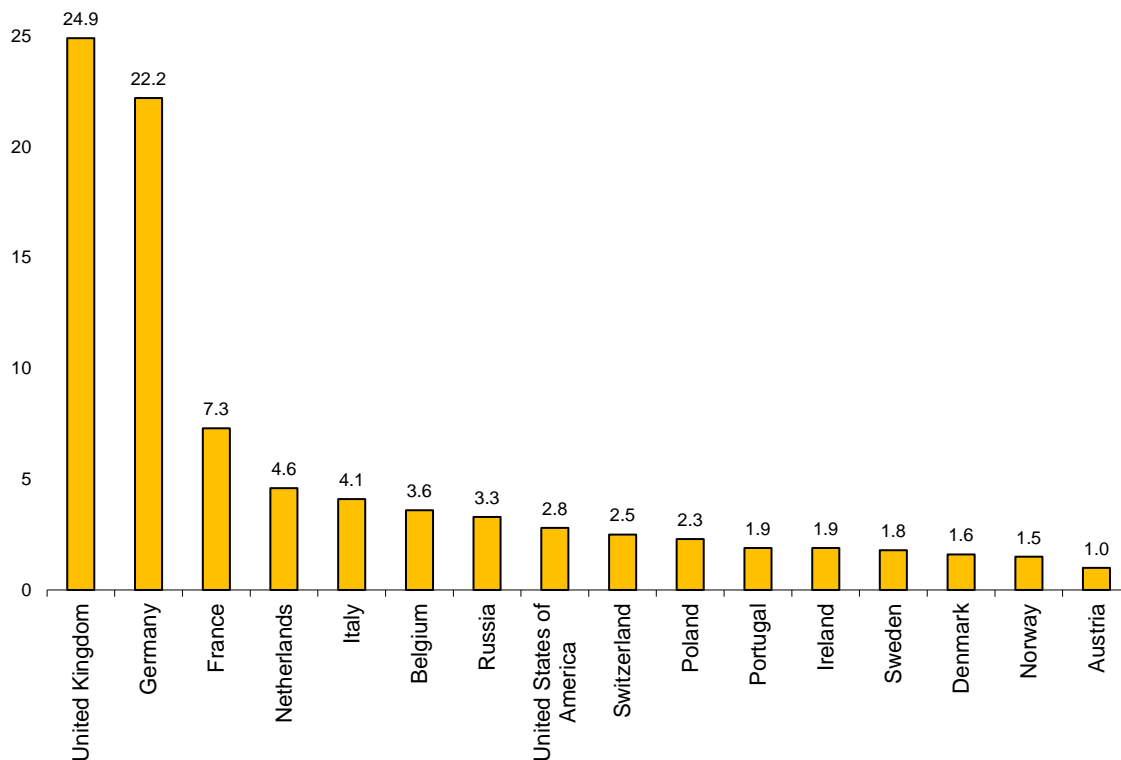
The tourist spots with more overnight stays are Barcelona, Madrid and Benidorm. Formentera reached the highest occupancy rate by bedplaces (96.4%) and Santa Margalida the greatest weekend occupancy rate (93.8%).

Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany concentrated 24.9% and 22.2%, respectively, of total overnight stays of non-residents in hotel establishments in July. The British market decreased by 5.2% and the German increased by 9.4%.

Overnight stays of travellers from France, the Netherlands and Italy (the following countries of origin) registered annual rates of -7.1%, 11.2% and 3.1%, respectively.

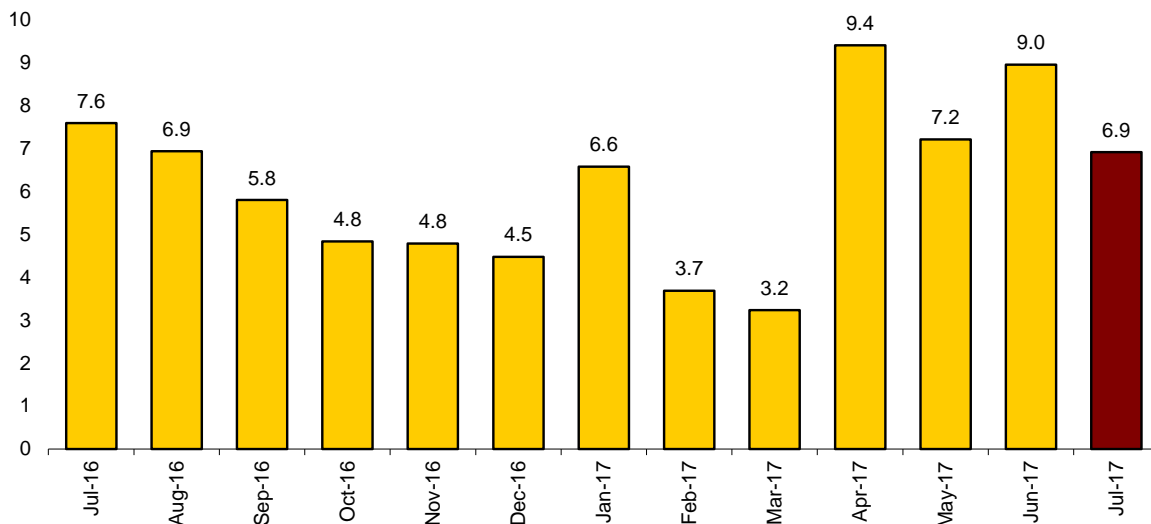
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 6.9% in July, which is 2.1 points less than that of the last month and 0.7 points below that registered a year ago.

Hotel Prices Index. Annual variation rate



Illes Balears, Cataluña, Andalucía and Canarias were the most heavily weighted Autonomous Communities in the HPI in July (accounting for 76.9% of the total weight). Hotel prices increased by 10.0% in the annual rate in Cataluña, 9.1% in Canarias, 8.0% in Illes Balears and 3,7% in Andalucía.

By hotel category, hotel prices increased in all of them. In two-golden-star establishments (9.6%), three-golden-star establishments (8.7%), one-silver-star establishments (7.5%), three and two-silver-star establishments (7.2%), one-golden-star establishments (7.0%), four-golden-star establishments (6.3%) and five-golden-star establishment (4.5%).

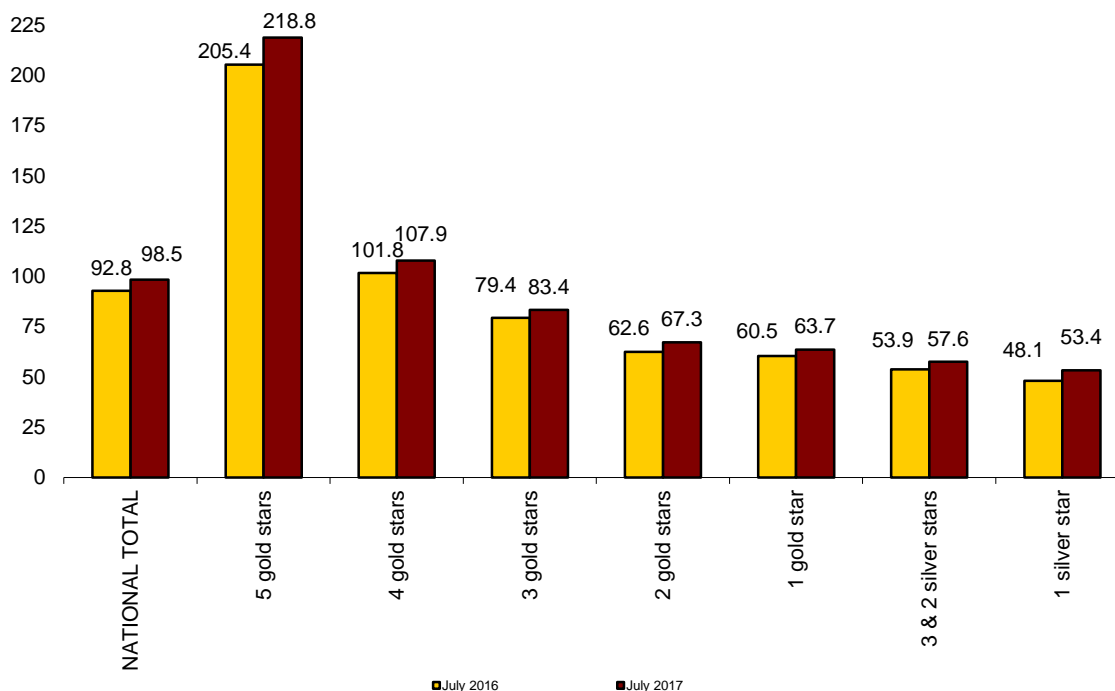
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 98.5 euros in July, which means an increase of 6.1% as compared with the same month of 2016.

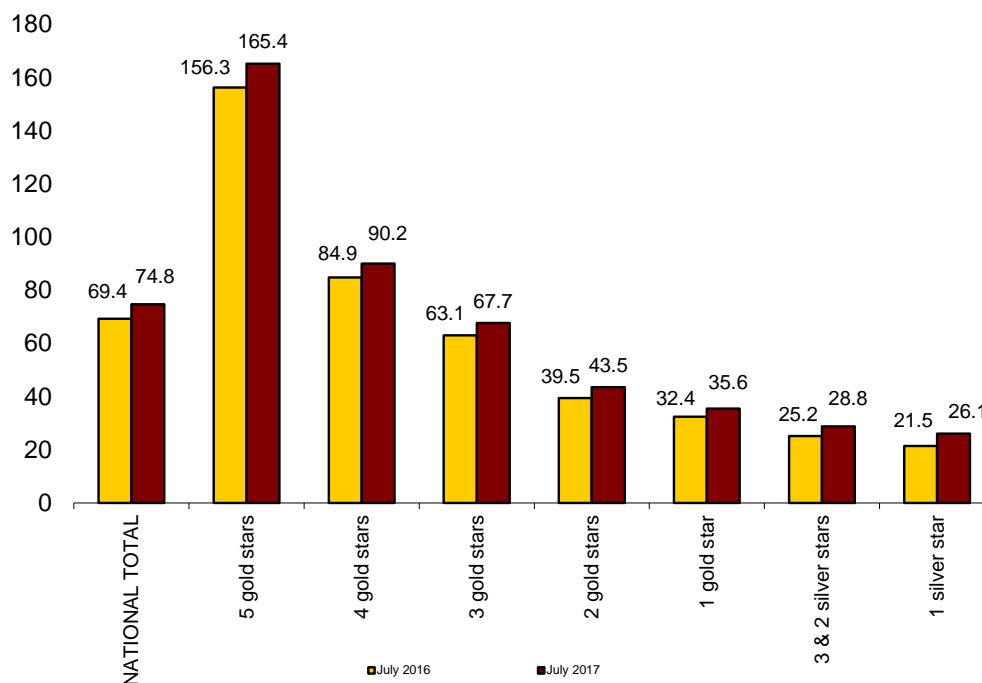
Meanwhile, the average daily income per room available (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 74.8 euros, with an increase of 7.9%.

By category, the average invoicing was 218.8 euros for five-star hotels, 107.9 euros for four-star hotels and 83.4 euros for three-star hotels. Income per available room for these same categories were 165.4, 90.2 and 67.7 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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Press office: Telephone numbers: 91 583 93 63 / 94 08 – Fax: 91 583 90 87 - gprensa@ine.es

Information Area: Telephone number: 91 583 91 00 – Fax: 91 583 91 58 – www.ine.es/infoine/?L=1

Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

July 2017

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	11,810,375	5,405,168	6,405,208	43,651,610	14,304,525	29,347,085	3.70
HOTELS: Golden stars							
Five	602,655	160,326	442,329	2,321,243	412,796	1,908,447	3.85
Four	5,246,726	2,259,203	2,987,522	21,084,551	6,470,271	14,614,280	4.02
Three	3,431,435	1,476,908	1,954,527	13,895,190	4,133,981	9,761,209	4.05
Two	959,305	565,101	394,204	2,686,134	1,282,656	1,403,478	2.80
One	411,164	254,484	156,680	984,478	535,060	449,417	2.39
INNS: Silver stars							
Two and three	625,574	394,535	231,039	1,399,588	819,955	579,633	2.24
One	533,517	294,610	238,907	1,280,426	649,805	630,621	2.40
Annual rate	1.77	-1.80	4.99	1.64	-1.93	3.47	-0.13
Cumulative annual rate	4.21	1.31	7.07	3.79	0.78	5.38	-0.40

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	16,774	864,588	1,804,339	73.14	77.26	75.42	271,651
HOTELS: Golden stars							
Five	309	46,618	97,415	72.13	76.66	74.24	35,707
Four	2,552	368,112	797,298	79.60	82.52	82.94	130,533
Three	3,001	248,675	522,675	79.18	83.17	80.79	70,537
Two	2,175	70,080	137,612	60.89	68.17	64.25	13,702
One	1,406	30,943	60,012	52.25	59.65	55.97	5,584
INNS: Silver stars							
Two and three	3,310	51,524	98,593	45.30	52.31	48.94	8,417
One	4,021	48,636	90,733	45.29	50.29	48.70	7,171
Annual rate	-0.91	0.30	0.62	0.66	2.24	1.05	4.87

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									
Palma - Calvià	49,974	451,745	215,997	2,687,587	92.05	92.30	91.49	5.79	17,653
Isla de Mallorca	91,051	1,125,604	452,051	7,564,295	91.89	91.60	91.67	6.59	43,863
Isla de Menorca	28,552	118,029	129,844	803,018	88.55	86.97	93.36	6.36	5,067
Sur de Gran Canaria	40,309	172,851	210,008	1,439,424	87.12	88.07	90.03	7.74	10,878
Islas de Ibiza-Formentera	54,052	304,268	197,313	1,615,274	86.79	90.11	87.96	5.06	11,281
Isla de Lanzarote	26,502	109,686	152,181	912,754	86.68	87.81	90.81	7.82	6,784
Sur de Tenerife	40,195	201,767	189,066	1,648,343	85.60	87.43	84.12	7.59	14,090
Costa Blanca	261,739	220,367	981,167	1,070,019	84.93	89.53	85.24	4.25	10,504

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

Costa del Sol	201,173	345,959	649,598	1,715,935	80.19	84.30	86.33	4.32	15,403
Isla de Tenerife	89,018	241,780	396,656	1,948,948	83.80	85.92	82.28	7.09	17,591
Barcelona	150,627	661,991	287,792	1,863,550	83.01	85.11	90.38	2.65	15,091
Costa Brava	184,541	333,775	536,070	1,565,468	77.01	82.45	78.50	4.05	10,324
Costa Daurada	203,772	249,650	605,272	1,378,069	83.67	86.79	86.82	4.37	7,229
Isla de Gran Canaria	63,898	186,078	269,894	1,492,964	83.73	85.25	86.75	7.05	11,928
Costa Barcelona	158,304	305,570	369,337	1,339,444	84.14	84.00	85.62	3.68	7,675
Isla de Fuerteventura	27,808	142,102	145,143	1,225,643	83.72	83.79	84.41	8.07	8,713

Tourist site with a greater occupancy rate per month

Formentera	6,473	22,200	34,106	127,336	96.39	87.42	94.51	5.63	876
Pollença	1,472	27,149	4,912	173,505	95.36	91.72	94.13	6.23	1,281
Santa Margalida	4,545	52,153	52,864	375,375	94.38	93.75	94.27	7.55	2,074
Ciutadella de Menorca	11,160	51,667	54,550	352,942	94.14	88.92	93.59	6.49	1,912
Muro	5,008	70,624	18,868	559,774	93.84	93.54	92.95	7.65	2,788
Capdepera	4,131	81,568	13,062	556,549	92.78	91.68	90.63	6.65	2,897
Calvià	19,841	207,290	112,512	1,352,196	92.00	92.15	90.99	6.45	8,901
Alcúdia	3,266	87,392	20,004	642,616	91.88	92.53	95.04	7.31	3,202
Calella	15,811	48,904	66,336	324,250	91.79	92.54	89.89	6.04	1,262
Palma	29,917	238,251	104,587	1,263,373	91.18	92.67	91.97	5.10	7,916

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

Barcelona	139,372	634,586	263,577	1,791,474	83.94	85.45	91.14	2.66	14,347
Madrid	314,339	481,162	530,194	1,131,942	64.07	68.16	72.14	2.09	12,139
Benidorm	123,622	115,099	585,875	729,328	87.87	90.35	87.68	5.51	6,057
San Bartolomé de Tirajana	32,275	127,276	160,083	1,047,663	88.32	88.89	90.65	7.57	8,648
Salou	78,557	153,869	247,084	954,188	89.45	92.33	91.47	5.17	3,656
Adeje	16,936	112,233	82,697	908,648	85.36	87.57	83.73	7.67	7,850
Lloret de Mar	32,184	133,646	110,873	766,832	84.35	85.56	84.81	5.29	3,147
Pájara	12,661	86,066	68,147	763,517	85.40	86.32	83.57	8.42	5,325
Sant Llorenç des Cardassar	1,951	89,106	8,351	733,340	91.04	88.83	93.40	8.15	4,189
Torremolinos	46,818	69,251	174,305	423,652	86.02	91.33	88.26	5.15	2,996

* 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	11,810,375	100.00	43,651,610	100.00
Residents in Spain	5,405,168	45.77	14,304,525	32.77
Residents abroad	6,405,208	54.23	29,347,085	67.23
Total Residents abroad	6,405,208	100.00	29,347,085	100.00
Total Residents in E.U. (without Spain)	4,622,316	72.16	23,578,368	80.34
- Germany	990,163	15.46	6,518,539	22.21
- Austria	58,358	0.91	287,978	0.98
- Belgium	218,199	3.41	1,045,970	3.56
- Denmark	94,528	1.48	476,054	1.62
- Finland	29,603	0.46	111,832	0.38
- France	677,246	10.57	2,132,409	7.27
- Greece	14,190	0.22	37,706	0.13
- Ireland	104,476	1.63	555,977	1.89
- Italy	329,208	5.14	1,209,757	4.12
- Luxembourg	12,194	0.19	51,457	0.18
- Netherlands	278,049	4.34	1,336,689	4.55
- Poland	120,927	1.89	678,335	2.31
- Portugal	173,455	2.71	561,780	1.91
- United Kingdom	1,246,358	19.46	7,292,585	24.85
- Czech Republic	38,708	0.60	239,258	0.82
- Sweden	113,746	1.78	522,149	1.78
- Other EU countries*	122,908	1.92	519,895	1.77
Norway	88,752	1.39	435,835	1.49
Russia	153,914	2.40	959,822	3.27
Switzerland	139,120	2.17	726,629	2.48
Rest of Europe	126,209	1.97	535,473	1.82
Japan	44,144	0.69	85,387	0.29
United States of America	337,710	5.27	826,956	2.82
Rest of America	365,890	5.71	915,713	3.12
Africa	100,429	1.57	274,229	0.93
Other countries	426,723	6.66	1,008,672	3.44

*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 2017

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	117.9	6.9
Andalucía	108.9	3.7
Aragón	61.8	2.4
Asturias, Principado de	97.8	3.5
Balears, Illes	143.5	8.0
Canarias	126.4	9.1
Cantabria	103.6	8.0
Castilla y León	94.8	3.7
Castilla - La Mancha	87.1	0.0
Cataluña	118.4	10.0
Comunitat Valenciana	110.6	2.1
Extremadura	94.1	1.7
Galicia	99.8	4.1
Madrid, Comunidad de	87.3	7.1
Murcia, Región de	85.9	3.8
Navarra, Comunidad Foral de	91.1	7.6
País Vasco	114.9	4.3
Rioja, La	85.2	-0.9
Ceuta	108.9	-0.2
Melilla	95.3	-3.0

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	117.9	6.9
HOTELS: Gold stars		
Five	107.9	4.5
Fourth	114.7	6.3
Three	125.3	8.7
Two	117.1	9.6
One	125.5	7.0
HOSTALS: Silver stars		
Three and two	118.7	7.2
One	114.4	7.5

Indicators on the Profitability of the Hotel Sector

July 2017

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	98.5	6.1	74.8	7.9
Andalucía	105.6	4.2	76.4	4.9
Aragón	54.6	0.3	25.8	8.3
Asturias, Principado de	67.5	1.9	40.3	0.9
Balears, Illes	115.4	5.4	105.8	4.1
Canarias	93.3	6.0	79.7	3.4
Cantabria	85.3	10.2	59.7	16.2
Castilla y León	57.8	5.1	27.7	10.9
Castilla - La Mancha	53.3	1.4	18.6	3.5
Cataluña	106.3	10.8	86.9	15.9
Comunitat Valenciana	92.3	4.3	73.1	6.7
Extremadura	57.1	0.5	21.9	3.9
Galicia	62.4	5.4	34.6	10.6
Madrid, Comunidad de	81.9	7.3	57.9	16.5
Murcia, Región de	78.9	4.9	47.2	2.5
Navarra, Comunidad Foral de	93.3	8.3	53.9	17.0
País Vasco	99.7	5.5	78.5	5.3
Rioja, La	59.2	-1.3	32.1	-2.3
Ceuta	71.0	-0.3	50.0	7.4
Melilla	65.8	-2.1	42.9	-9.1

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	98.5	6.1	74.8	7.9
HOTELS: Gold stars				
Five	218.8	6.5	165.4	5.8
Four	107.9	6.0	90.2	6.2
Three	83.4	5.1	67.7	7.3
Two	67.3	7.5	43.5	10.2
One	63.7	5.3	35.6	9.6
GUESTHOUSES: Silver stars				
Three and two	57.6	6.9	28.8	14.3
One	53.4	11.0	26.1	21.8

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

Indicators on Profitability (ANNEX OF TABLES) - July 2017

23rd August 2017