

23 September 2015
(Update 05 October 2015)

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

Overnight stays in hotel establishments register an increase of 4.5% in August, as compared to the same month of 2014

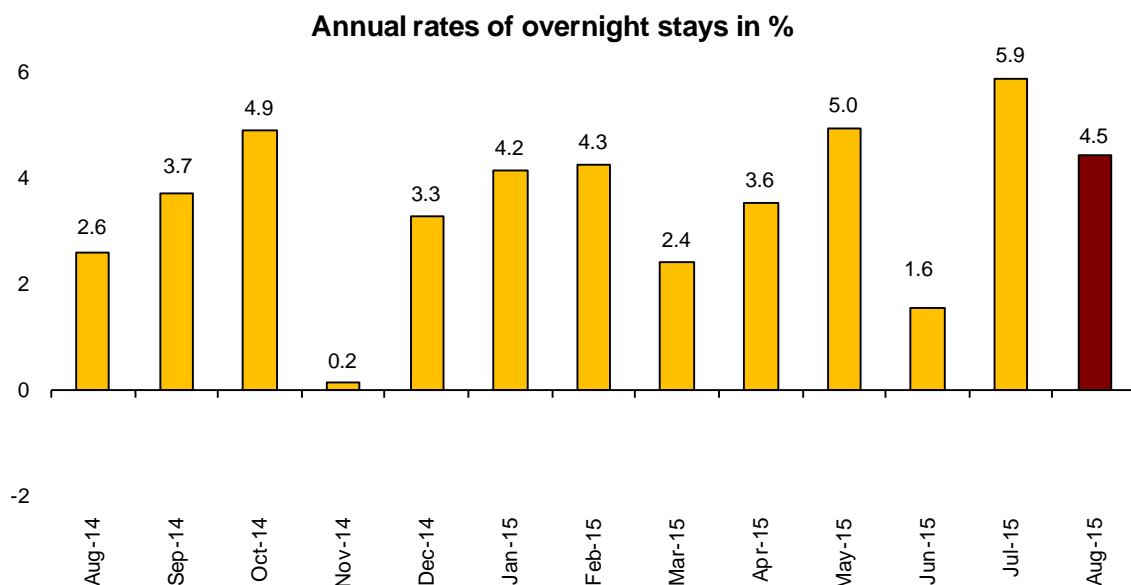
Hotels invoice an average of 95.1 euros per occupied room, which means an annual increase of 7.0%

In August, a total of 44.9 million overnight stays were registered in hotel establishments, 4.5% more than in the same month of 2014. Overnight stays for residents in Spain increased by 5.2%, whereas those of non-residents did so by 4.0%.

The average stay decreased 0.4%, as compared to August 2014, standing at 3.8 nights per guest.

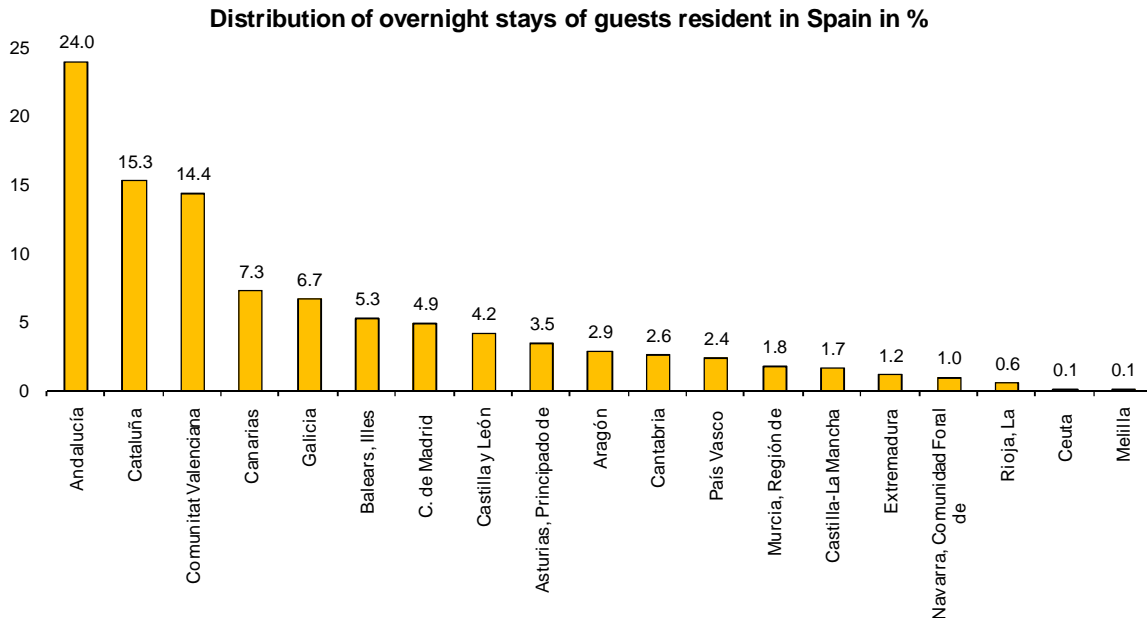
In the aggregated period of July and August, overnight stays increased 5.1% as compared with the same period of 2014. Those of residents increased 6.0% and that of non-residents 4.6%.

During the first eight months of 2015, overnight stays increased 4.0%, as compared to the same period of the previous year.

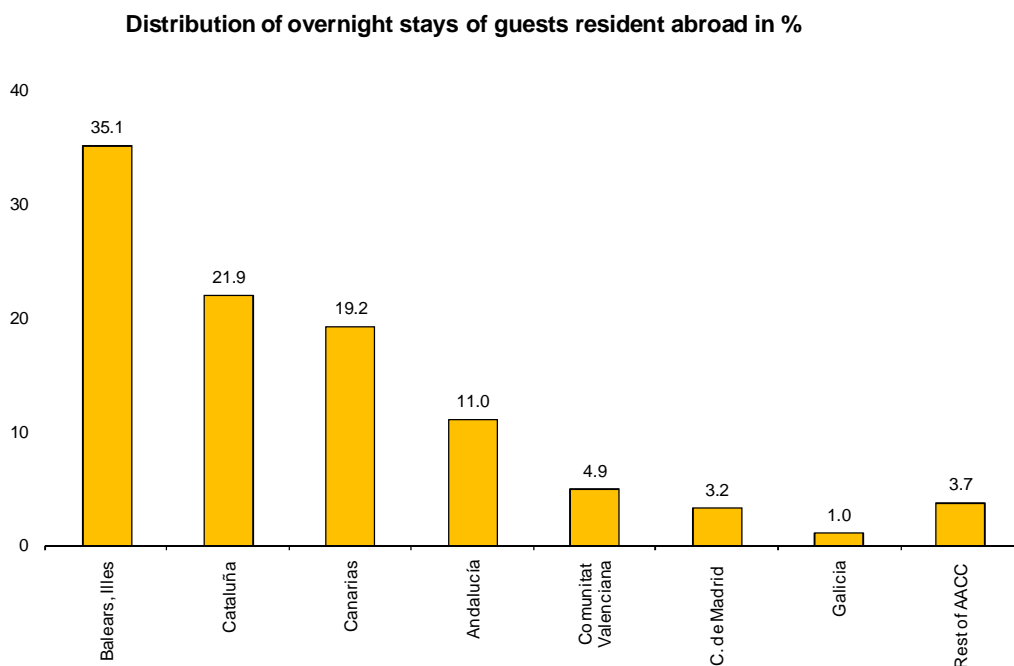


Main destinations

In August, Andalucía, Cataluña, Comunitat Valenciana, and Canarias were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 1.5%, 17.4%, 2.8%, and -5.7%, respectively.



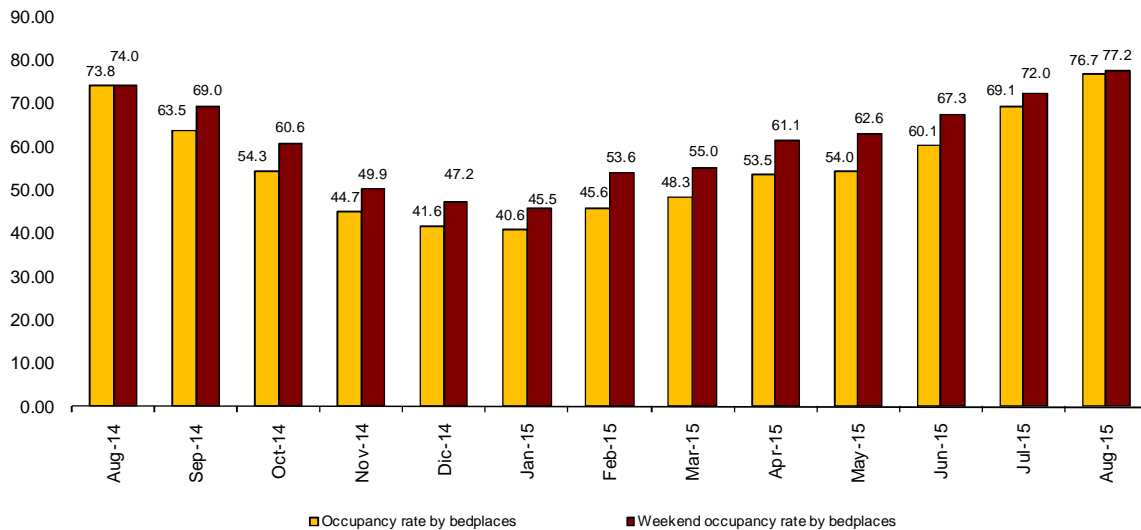
The main destination chosen by non-residents was Illes Balears, with 35.1% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 2.3% as compared to August 2014. The following destinations of non-residents were Cataluña (21.9% of the total and a decrease of 1.8%) and Canarias (19.2% and an increase of 5.4% in overnight stays).



Hotel Occupancy

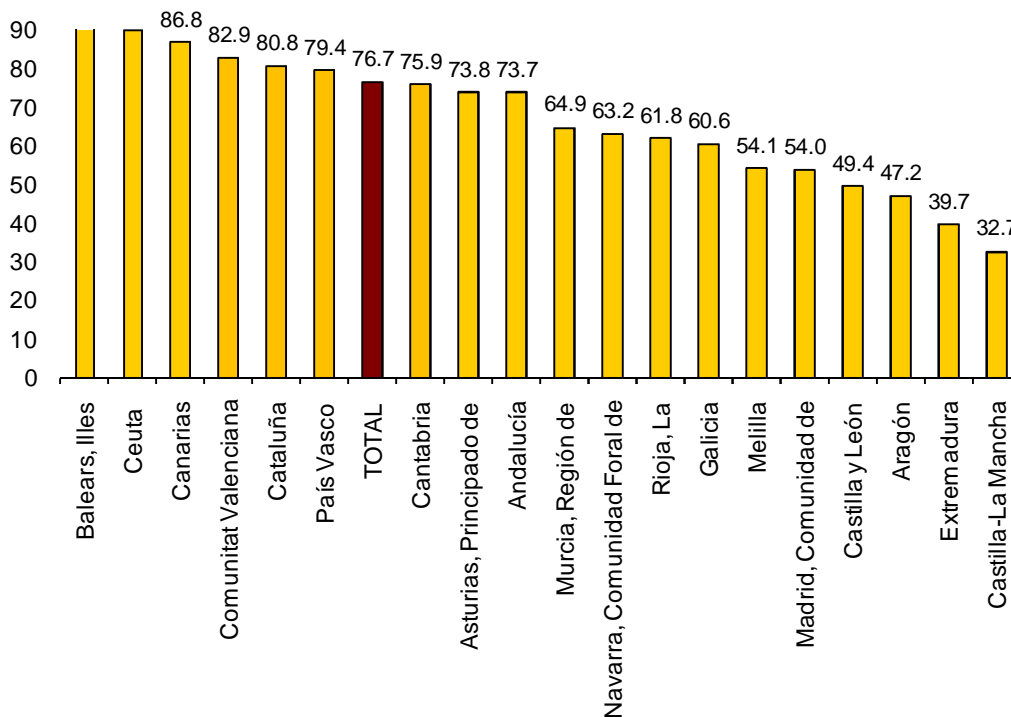
In August, 76.7% of the available bedplaces were occupied, indicating an annual increase of 4.0%. The weekend occupancy rate by bedplaces increased by 4.3%, standing at 77.2%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears registered the greatest occupancy rate by bedplaces in August (92.9%), followed by Canarias (86.8%) and Comunitat Valenciana (82.9%).

Occupancy rate by bedplaces by Autonomous Community



By tourist area, the island of Lanzarote registered the highest occupancy rate by bedplaces (95.5%), while the island of Mallorca recorded the highest weekend occupancy rate (91.9%) and the highest number of overnight stays, with more than 7.8 million.

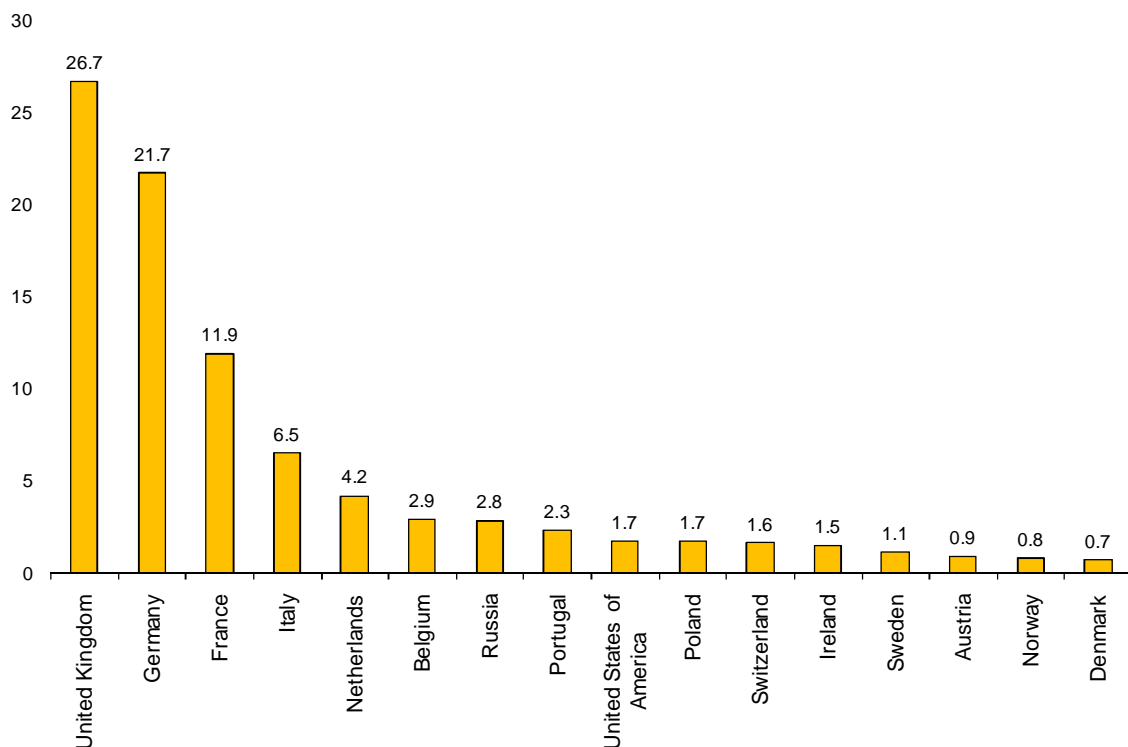
The tourist sites with the highest number of overnight stays were Barcelona, Calvià and Benidorm. Tías reached the highest occupancy rate by bedplaces (99.5%) and Lluçmayor reached the greatest weekend occupancy rate (99.3%).

Overnight stays according to the country of origin of the guests

Guests from United Kingdom and Germany concentrated 26.7% and 21.7%, respectively, of the total of overnight stays in hotel establishments by non-residents in August. The British market increased by 12.2% and the German one decreased by 3.7%.

Overnight stays of guests from France, Italy and Netherlands (the following countries of origin) registered annual rates of 10.0%, 8.2% and 15.8%, respectively.

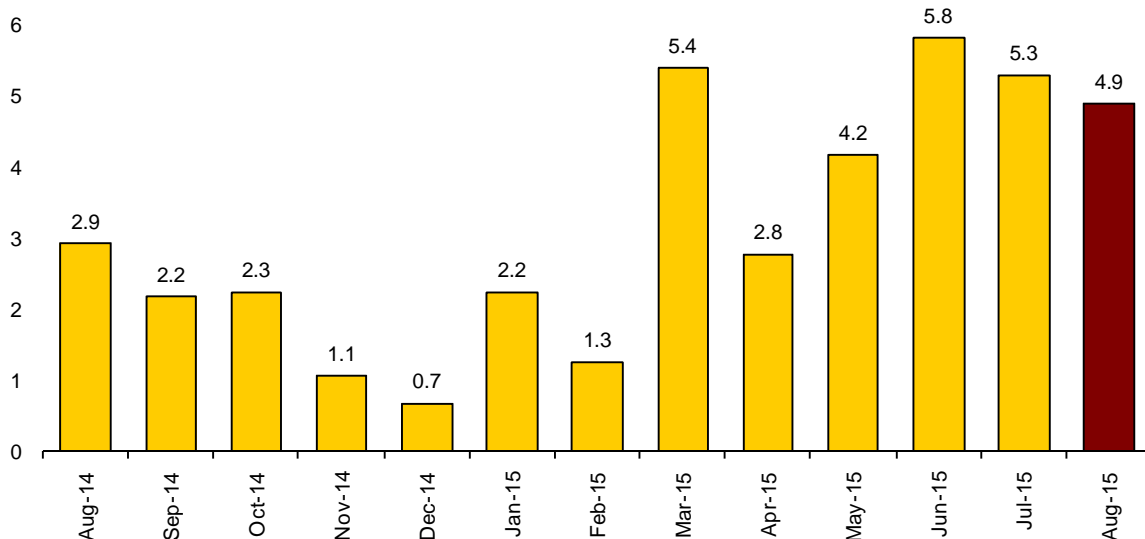
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 4.9% in August, that is, 0.4 points below that of the previous month and 2.0 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 August (they represented 77.0% of the total). Hotel prices increased 6.8% in the annual rate in Andalucía, 5.5% in Illes Balears, 4.9% in Cataluña and 1.9% in Canarias.

By hotel category, prices increased in all categories. In five-golden-star establishments (7.5%), three-golden-star establishments (6.7%), one-silver-star establishments (5.4%), one-golden-star establishments (4.8%), two-golden-star establishments and three and two-silver-star establishments (3.7% in both cases), and four-golden-star establishments (3.5%).

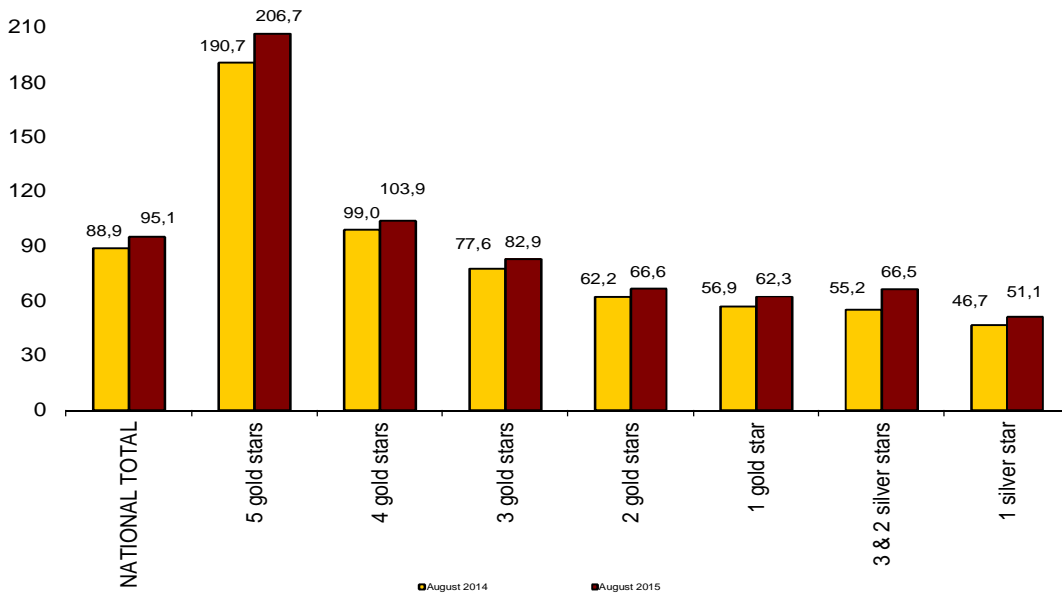
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in August was 95.1 euros, which represented an increase of 7.0% as compared to the same month of 2014.

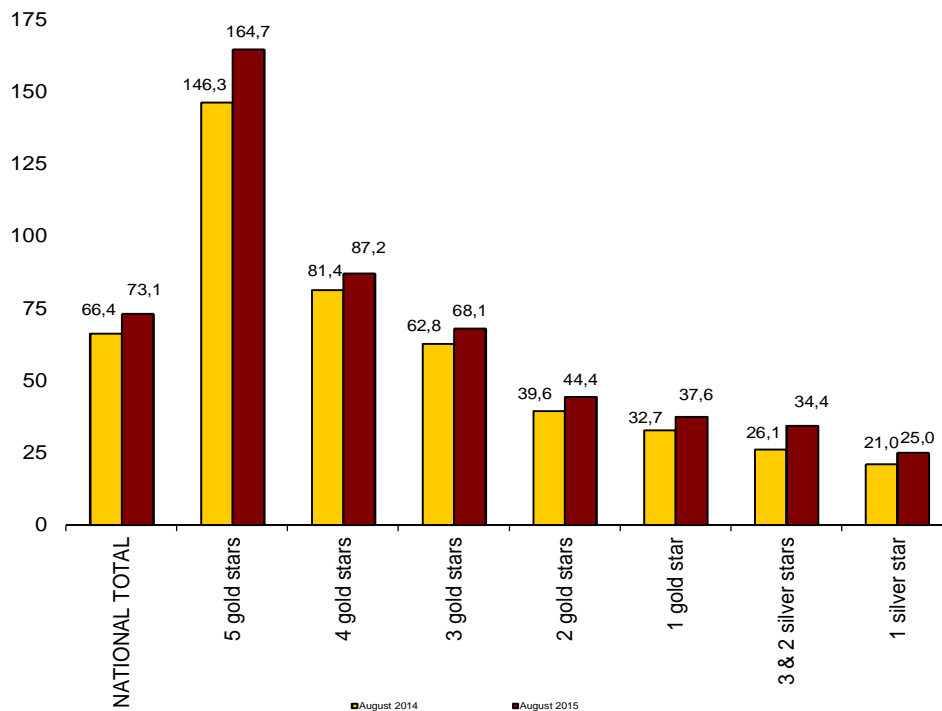
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 73.1 euros, with an increase of 10.2%.

By category, the average invoicing was 206.7 euros for five-star hotels, 103.9 euros for four-star hotels and 82.9 euros for three-star hotels. Income per available room for the same categories was 164.7, 87.2, and 68.1 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)

August 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	11,772,679	5,939,499	5,833,180	44,905,458	17,308,998	27,596,459	3.81
HOTELS: Golden stars							
Five	520,430	173,103	347,327	2,225,878	568,617	1,657,261	4.28
Four	5,066,235	2,452,795	2,613,440	21,171,492	7,918,258	13,253,234	4.18
Three	3,499,507	1,714,688	1,784,819	14,664,313	5,076,770	9,587,542	4.19
Two	970,216	583,857	386,359	2,796,258	1,474,219	1,322,039	2.88
One	438,113	278,038	160,075	1,074,916	642,072	432,844	2.45
INNS: Silver stars							
Two and three	678,229	426,520	251,709	1,614,706	917,722	696,983	2.38
One	599,949	310,498	289,451	1,357,895	711,340	646,556	2.26
Annual rate	4.85	4.49	5.21	4.45	5.22	3.98	-0.37
Cumulative annual rate	5.77	6.33	5.19	4.03	6.29	2.77	-1.64

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	16,734	851,070	1,769,962	76.68	77.22	76.85	249,880
HOTELS: Golden stars							
Five	277	42,167	87,690	77.34	78.09	79.32	29,456
Four	2,412	349,679	755,168	83.74	83.22	84.26	118,336
Three	3,035	255,446	536,543	82.23	82.33	82.13	66,508
Two	2,170	69,901	135,806	64.34	68.14	66.13	13,206
One	1,387	30,249	58,911	57.81	60.76	60.07	5,743
INNS: Silver stars							
Two and three	3,288	53,363	102,685	49.99	53.55	51.40	8,953
One	4,164	50,266	93,159	46.34	48.12	48.48	7,678
Annual rate	-0.43	-0.29	0.24	3.96	4.32	3.09	3.50

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-places	Of bed-places at weekend	Of bedrooms		
Tourist area with a greater occupancy rate per month									
Isla de Lanzarote	40,218	97,122	256,013	878,353	95.49	80.81	94.66	8.26	6,152
Isla de Mallorca	90,588	1,047,008	483,294	7,365,364	93.56	91.86	93.22	6.90	37,454
Palma - Calvià	40,804	419,073	199,923	2,633,653	93.19	91.17	93.66	6.16	13,987
Costa de La Luz de Huelva	125,452	38,772	592,075	253,119	93.13	83.37	84.24	5.15	3,925
Isla de Menorca	47,552	102,013	211,752	705,163	91.42	89.89	94.32	6.13	4,474
Costa Blanca	285,698	165,612	1,251,068	903,599	91.33	91.28	87.23	4.77	9,797
Islas de Ibiza-Formentera	49,268	276,369	213,722	1,624,040	90.88	91.18	89.34	5.64	11,065
Sur de Tenerife	56,003	173,577	281,155	1,605,293	90.84	86.74	87.68	8.22	11,958

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

Costa del Sol	260,337	293,208	974,906	1,504,285	84.09	84.72	88.52	4.48	13,699
Costa Brava	241,303	319,658	779,660	1,562,292	82.58	84.34	83.25	4.17	10,204
Isla de Tenerife	98,220	207,869	461,065	1,852,929	85.75	84.11	82.73	7.56	15,037
Barcelona	112,253	636,150	235,737	1,909,099	85.37	85.81	88.70	2.87	13,841
Costa Daurada	228,390	204,319	839,197	1,139,789	83.87	82.28	87.47	4.57	6,970
Costa Barcelona	127,954	292,361	336,653	1,344,586	84.66	80.48	82.94	4.00	7,045
Isla de Gran Canaria	66,010	147,280	345,977	1,319,299	82.74	78.21	83.76	7.81	11,132
Sur de Gran Canaria	47,717	135,665	289,519	1,265,139	86.48	81.39	87.36	8.48	9,974

Tourist site with a greater occupancy rate per month

Tías	10,555	30,164	77,714	247,179	99.53	75.58	95.48	7.98	1,689
Llucmajor	8,734	53,215	55,817	367,832	99.34	99.27	94.96	6.84	1,610
Muro	6,410	64,200	39,364	523,402	98.90	90.61	96.95	7.97	2,965
Santanyí	3,731	51,738	16,544	400,425	96.89	94.21	90.55	7.52	1,708
Yaiza	18,827	43,903	113,167	424,086	96.83	84.70	95.61	8.56	2,897
Formentera	5,456	22,516	25,197	136,329	96.17	95.50	96.56	5.77	793
Benidorm	144,622	92,940	714,555	655,540	95.51	93.65	89.87	5.77	5,763
Alcúdia	3,557	73,652	26,390	591,893	95.41	95.19	95.33	8.01	3,034
Sant Antoni de Portmany	11,075	54,975	48,732	312,554	95.40	94.51	92.92	5.47	1,406
Palma	24,299	189,848	117,301	1,130,239	94.82	91.83	94.47	5.83	6,267

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

Barcelona	103,102	610,928	212,414	1,822,627	85.85	86.31	89.10	2.85	13,202
Calvià	11,471	215,106	58,420	1,423,833	90.36	89.43	92.25	6.54	7,033
Madrid	318,488	353,378	568,003	793,200	56.14	60.20	58.83	2.03	10,186
San Bartolomé de Tirajana	39,237	102,712	243,878	923,582	86.69	86.35	87.88	8.22	7,813
Salou	81,104	111,251	333,428	773,575	88.19	84.74	90.77	5.76	3,425
Lloret de Mar	45,149	134,350	177,673	849,940	87.91	89.75	89.59	5.72	3,181
Adeje	24,495	91,044	132,065	828,764	90.34	85.27	89.45	8.32	6,552
Pájara	11,703	79,588	77,574	768,047	93.60	94.87	92.30	9.26	4,679
Sant Llorenç des Cardassar	3,024	89,844	16,026	730,108	94.63	93.17	93.94	8.03	3,234
Torremolinos	64,958	56,814	282,870	353,486	90.04	93.13	90.31	5.23	2,827

* 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	11,772,679	100.00	44,905,458	100.00
Residents in Spain	5,939,499	50.45	17,308,998	38.55
Residents abroad	5,833,180	49.55	27,596,459	61.45
Total Residents abroad	5,833,180	100.00	27,596,459	100.00
Total Residents in E.U. (without Spain)	4,513,757	77.38	23,350,607	84.61
- Germany	902,102	15.47	5,979,440	21.67
- Austria	49,304	0.85	244,361	0.89
- Belgium	156,180	2.68	811,366	2.94
- Denmark	38,055	0.65	197,738	0.72
- Finland	22,018	0.38	75,505	0.27
- France	927,322	15.90	3,280,968	11.89
- Greece	11,358	0.19	29,261	0.11
- Ireland	75,438	1.29	404,555	1.47
- Italy	480,252	8.23	1,791,921	6.49
- Luxembourg	11,074	0.19	62,930	0.23
- Netherlands	210,347	3.61	1,150,840	4.17
- Poland	84,899	1.46	473,951	1.72
- Portugal	201,720	3.46	641,632	2.33
- United Kingdom	1,157,518	19.84	7,373,095	26.72
- Czech Republic	25,509	0.44	140,906	0.51
- Sweden	67,554	1.16	308,368	1.12
- Other EU countries*	93,107	1.60	383,770	1.39
Norway	41,835	0.72	211,872	0.77
Russia	125,425	2.15	763,035	2.76
Switzerland	87,468	1.50	432,854	1.57
Rest of Europe	97,649	1.67	370,663	1.34
Japan	55,262	0.95	103,932	0.38
United States of America	201,480	3.45	478,766	1.73
Rest of America	234,367	4.02	566,901	2.05
Africa	98,524	1.69	287,713	1.04
Other countries	377,414	6.47	1,030,116	3.73

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

Hotel Price Index (HPI). 2008 Base

August 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

		Annual growth rate
TOTAL	104.9	4.9
Andalucía	99.5	6.8
Aragón	63.1	1.9
Asturias, Principado de	89.1	3.5
Balears, Illes	120.8	5.5
Canarias	105.0	1.9
Cantabria	91.7	5.8
Castilla y León	88.5	2.7
Castilla - La Mancha	83.4	1.3
Cataluña	110.0	4.9
Comunitat Valenciana	99.2	4.5
Extremadura	92.5	5.5
Galicia	93.2	6.7
Madrid, Comunidad de	81.5	5.2
Murcia, Región de	86.3	6.4
Navarra, Comunidad Foral de	87.7	1.2
País Vasco	106.4	4.8
Rioja, La	91.4	3.4
Ceuta	108.5	0.0
Melilla	95.3	0.0

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	104.9	4.9
HOTELS: Gold stars		
Five	101.7	7.5
Fourth	101.3	3.5
Three	110.8	6.7
Two	106.0	3.7
One	108.1	4.8
HOSTALS: Silver stars		
Three and two	102.9	3.7
One	103.5	5.4

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