

23 September 2016

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
August 2016. *Provisional data*

Overnight stays in hotel establishments register an increase of 3.8% in August, as compared to the same month of 2015

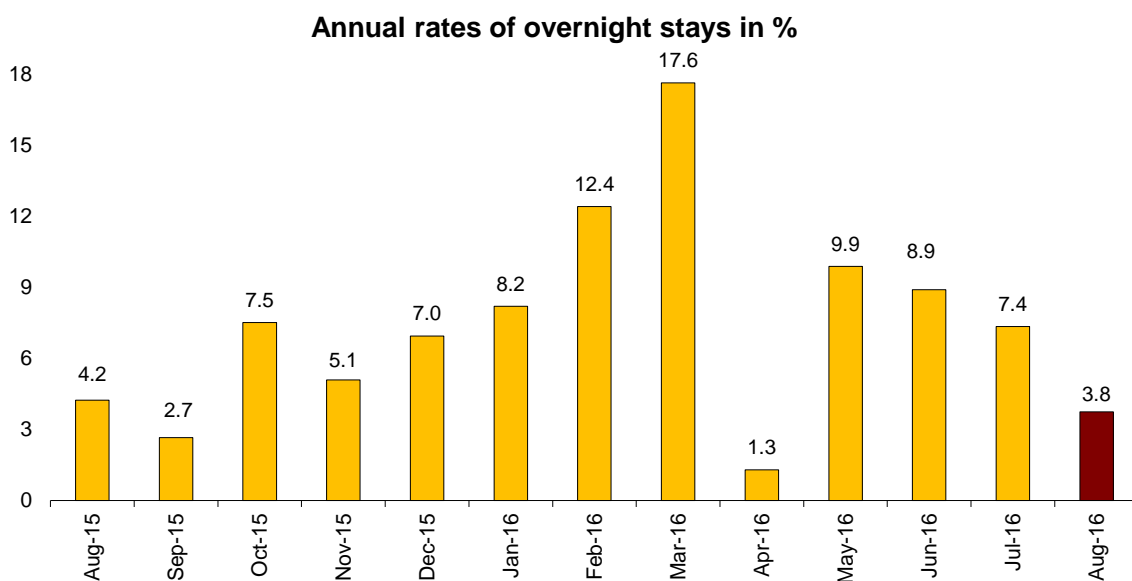
Hotels invoice an average of 100.2 euros per occupied room, which means an annual increase of 5.2%

In August, a total of 46.4 million overnight stays were registered in hotel establishments, 3.8% more than in the same month of 2015. Overnight stays by residents in Spain decreased by 0.3% and those of non-residents increased so by 6.3%.

The average stay remains unchanged compared to August 2015, standing at 3.8 nights per guest.

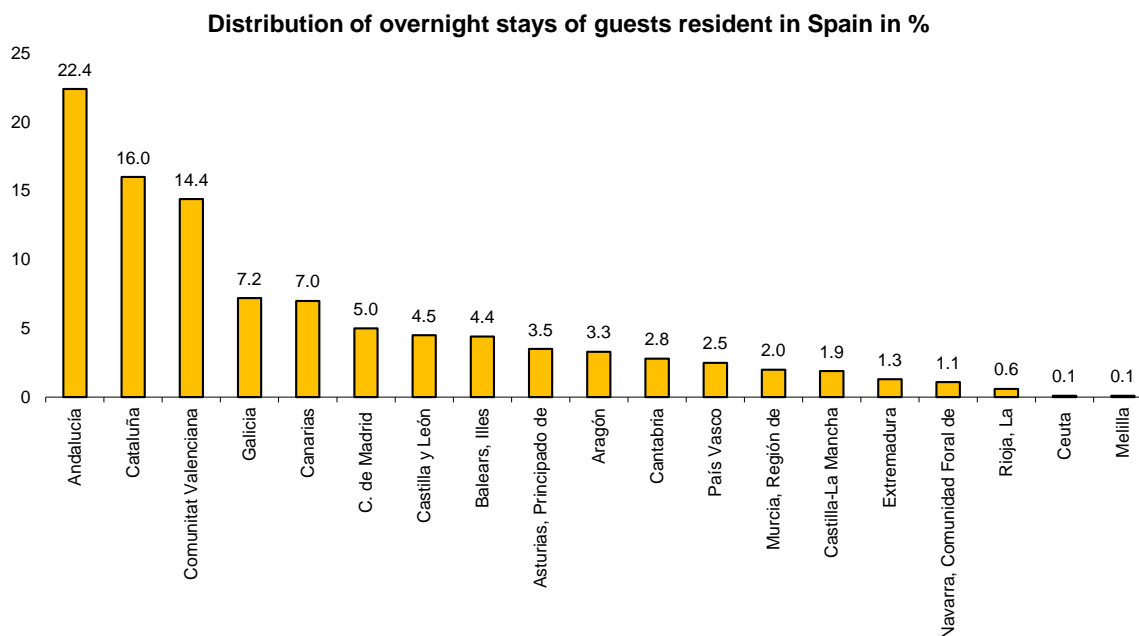
In the aggregated period of July and August, overnight stays increased 5.4% as compared with the same period of 2015. Those of residents increased 2.4% and that of non-residents 7.2%.

During the first eight months of 2016, overnight stays increased 7.8%, as compared to the same period of the previous year.

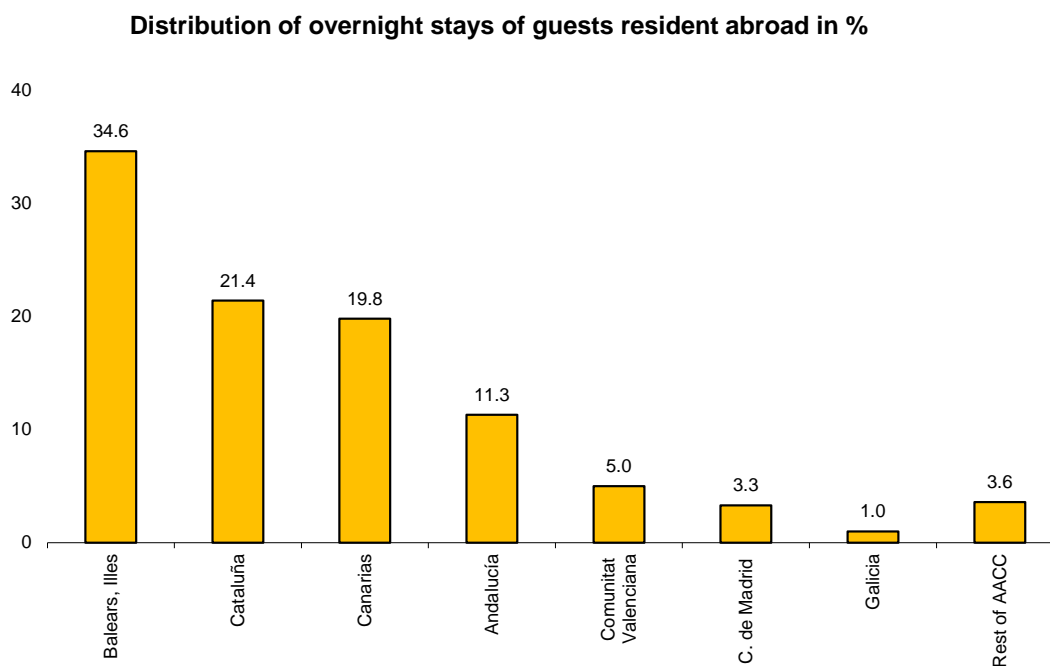


Main destinations

In August, Andalucía, Cataluña, Comunitat Valenciana, and Galicia were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of –4.7%, 2.3%, –0.8% and 5.8%, respectively.



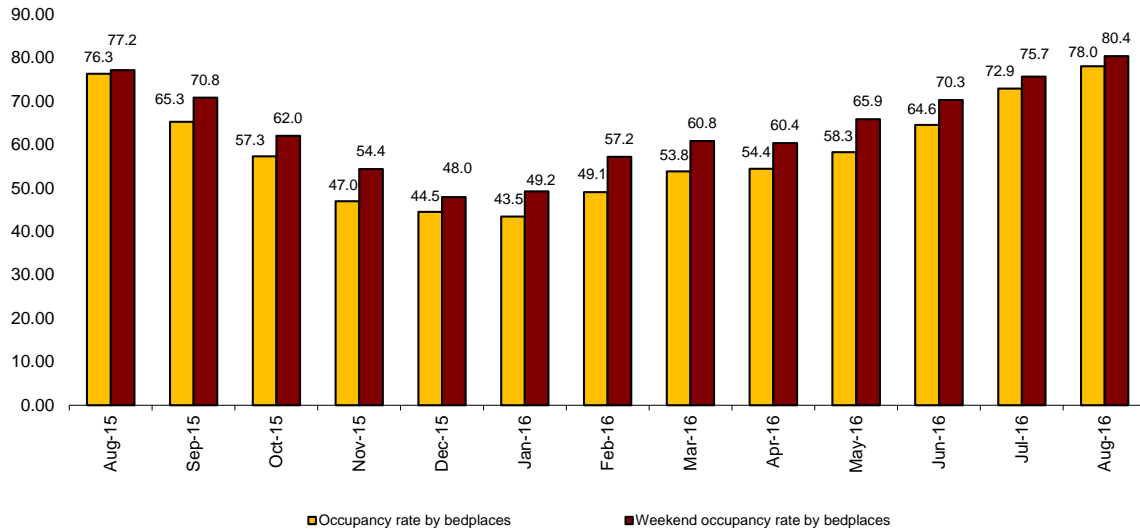
The main destination chosen by non-residents was Illes Balears, with 34.6% of the total amount of overnight stays. In this Autonomous Community, overnight stays by non-residents increased 3.0% as compared to August 2015. The following destinations of non-residents were Cataluña (21.4% of the total and an increase of 4.3% in overnight stays) and Canarias (19.8% of the total and an increase of 10.7% in overnight stays).



Hotel Occupancy

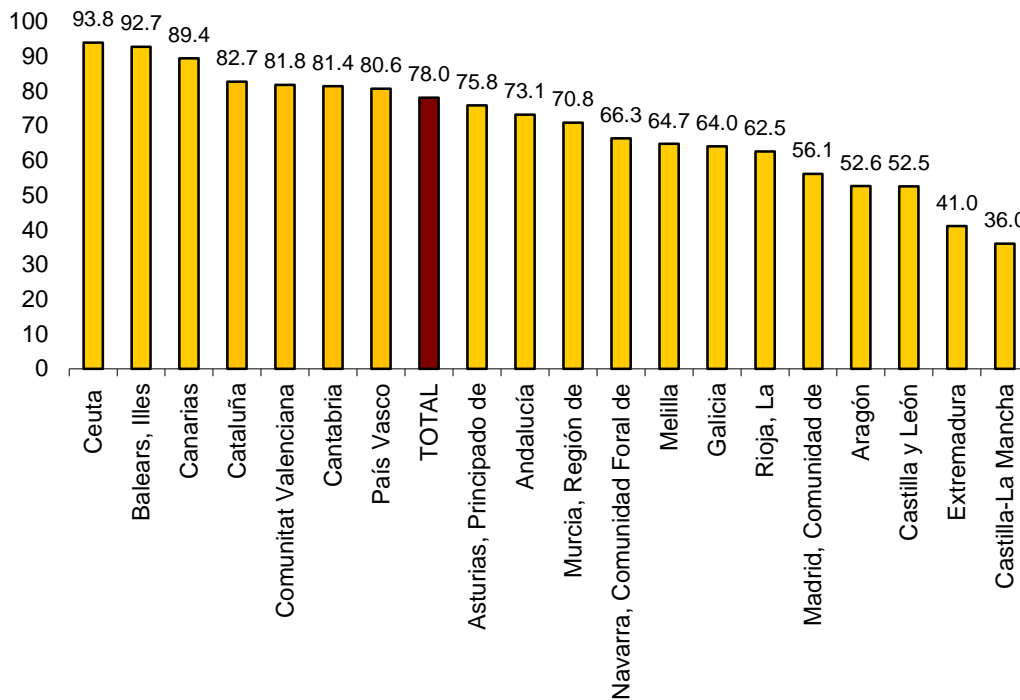
In August, 78.0% of the available bedplaces were occupied, indicating an annual increase of 2.2%. The weekend occupancy rate by bedplaces increased by 4.2%, standing at 80.4%.

Occupancy rate and weekend occupancy rate by bedplaces



The following graph shows the occupancy rate by places by Autonomous Communities.

Occupancy rate by bedplaces by Automous Community



By tourist areas, the island of Mallorca registered the highest occupancy rate by bedplaces (93.0%), and the island of Ibiza-Formentera, the highest weekend occupancy rate (93.7%). The Costa del Sol recorded the highest number of overnight stays, with more than 2.5 million.

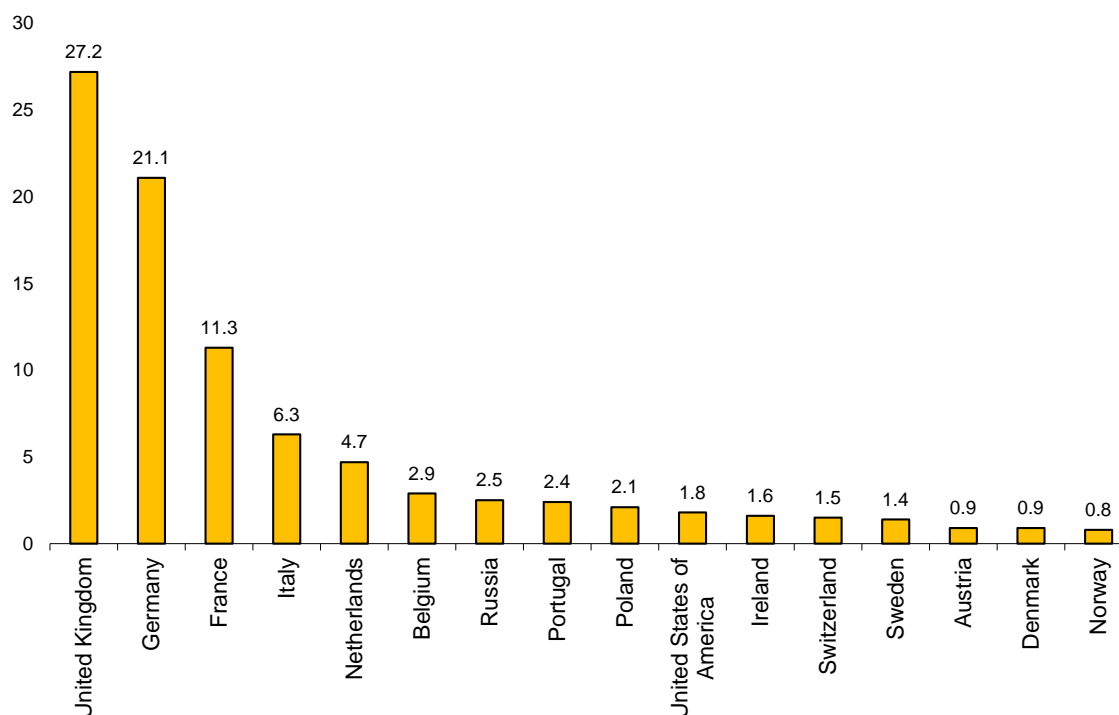
The tourist sites with the highest number of overnight stays were Barcelona, Calvià and Madrid. Muro reached the highest occupancy rate by bedplaces (98.8%) and Lluçmajor the greatest weekend occupancy rate (98.2%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 27.2% and 21.1%, respectively, of the total of overnight stays in hotel establishments by non-residents in August. The British market increased by 9.4%, and the German one did so by 1.4%.

Overnight stays of guests from France, Italy and the Netherlands (the following countries of origin) registered annual rates of 0.6%, 1.6% and 20.4%, respectively.

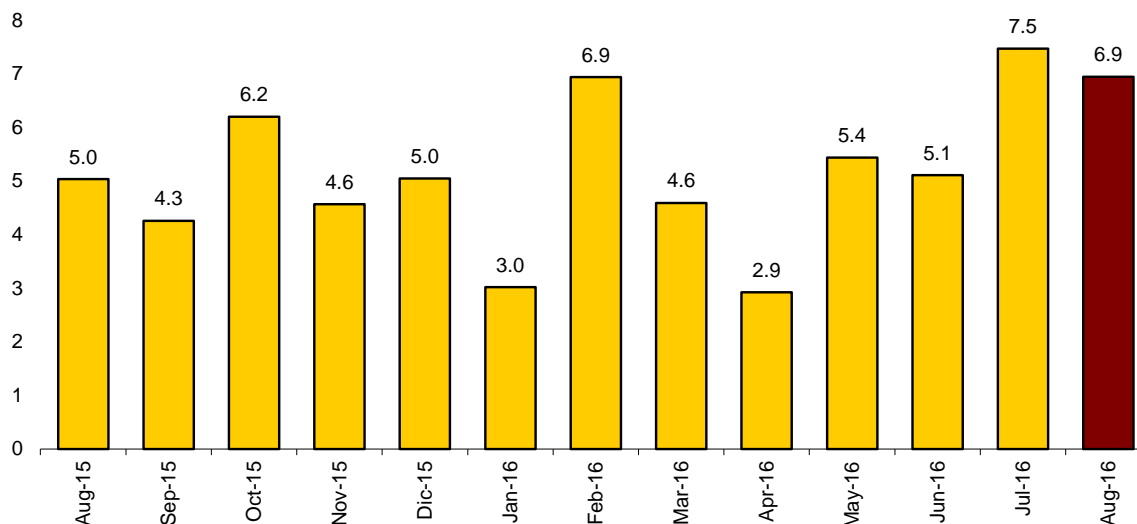
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 6.9% in August, that is, 0.6 points less than that of the previous month and 1.9 points above 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 August (they represented 76.5% of the total). Hotel prices increased by 9.1% in the annual rate in Canarias, 8.9% in Illes Balears and 5.4% in Cataluña and in Andalucía.

By hotel category, increase in hotel prices were registered in all of them. In three-golden-star establishments (9.0%), in four -golden-star establishments (7.0%), in one-golden-star establishments (6.0%), in five-golden-star establishments (5.5%), in three-silver-star and in two-silver-star establishments (5.5% in both cases), in one-silver-star establishments (3.6%) and in two-golden-star establishments (1.2%).

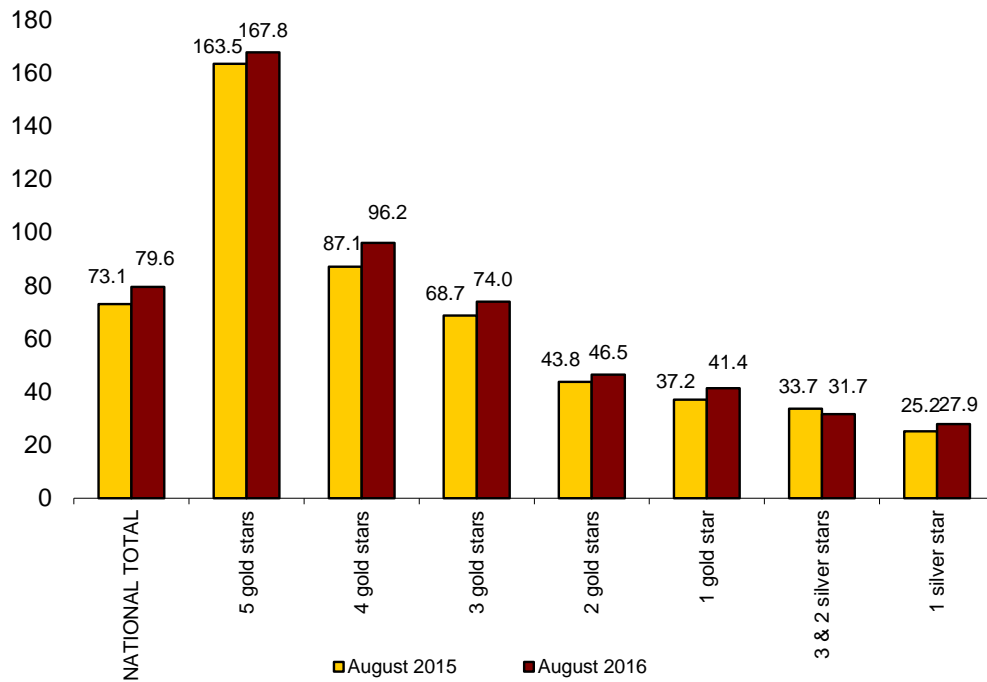
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in August was 100.2 euros, which represented an increase of 5.2% as compared to the same month of 2015.

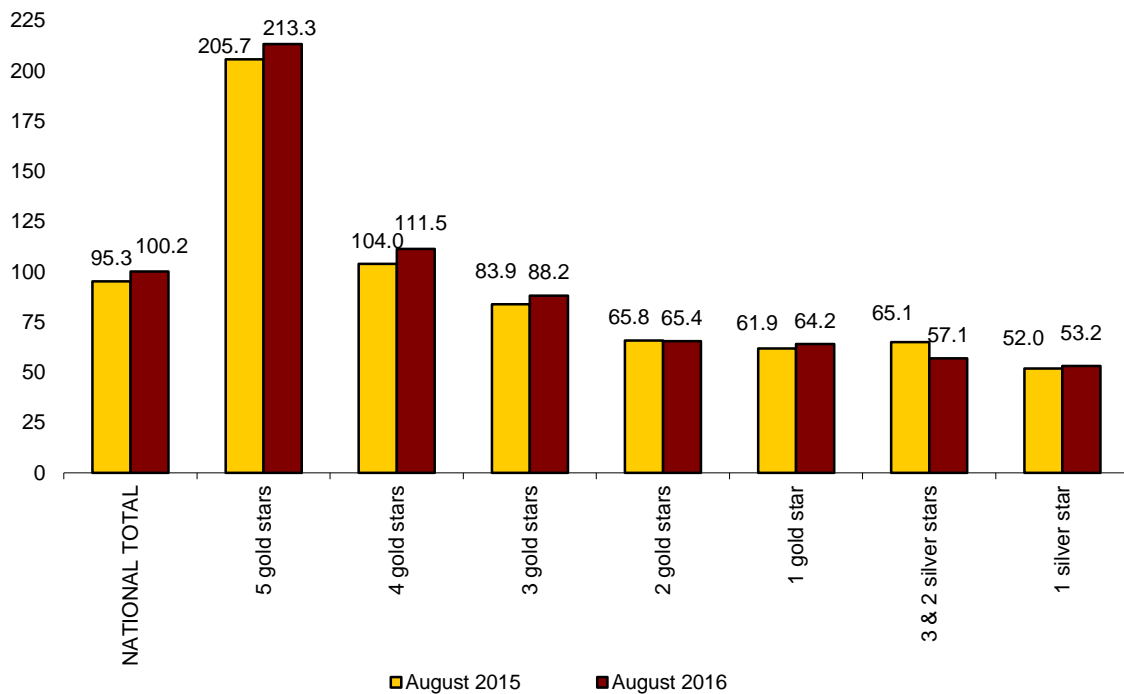
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 79.6 euros, with an increase of 8.9%.

By category, the average invoicing was 213.3 euros for five-star hotels, 111.5 euros for four-star hotels and 88.2 euros for three-star hotels. Income per available room for the same categories were 167.8, 96.2 and 74.0 euros, respectively.

Revenue per available room (RevPAR) by hotel category in euros



Average daily rate (ADR) by hotel category in euros



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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

August 2016

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	12,184,902	6,024,734	6,160,167	46,492,618	17,221,182	29,271,436	3.82
HOTELS: Golden stars							
Five	563,131	171,991	391,140	2,317,675	534,550	1,783,125	4.12
Four	5,168,120	2,424,256	2,743,864	22,012,866	7,684,017	14,328,849	4.26
Three	3,595,769	1,705,652	1,890,117	14,902,657	4,969,693	9,932,964	4.14
Two	1,027,945	619,037	408,909	3,002,658	1,545,769	1,456,890	2.92
One	488,261	311,030	177,230	1,186,121	720,775	465,346	2.43
INNS: Silver stars							
Two and three	712,212	460,087	252,126	1,658,711	1,008,549	650,162	2.33
One	629,464	332,682	296,782	1,411,929	757,829	654,100	2.24
Annual rate	3.72	1.34	6.16	3.75	-0.32	6.30	0.02
Cumulative annual rate	7.10	4.45	9.85	7.80	3.78	10.13	0.66

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	16,854	860,810	1,791,928	78.03	80.37	78.96	264,082
HOTELS: Golden stars							
Five	291	44,031	91,603	77.32	79.82	78.32	32,512
Four	2,489	360,854	779,721	83.87	85.77	85.60	125,775
Three	3,042	253,131	532,025	83.62	84.71	83.90	69,427
Two	2,168	69,861	136,568	68.54	73.40	70.47	13,824
One	1,421	31,383	61,062	61.40	66.55	64.58	6,165
INNS: Silver stars							
Two and three	3,317	52,057	99,292	53.02	58.52	55.26	8,911
One	4,124	49,493	91,657	48.87	53.12	51.78	7,468
Annual rate	0.11	0.71	1.02	2.23	4.17	2.91	5.73

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 Mallorca	74,807	1,088,829	364,840	7,602,763	92.97	92.19	92.58	6.85	39,803
Islas de Ibiza-Formentera	50,154	324,410	209,229	1,739,293	92.72	93.74	93.05	5.20	11,959
Sur de Gran Canaria	50,443	156,278	295,726	1,424,729	92.50	90.20	91.62	8.32	11,154
Isla de Lanzarote	31,227	96,663	195,120	888,412	92.17	91.77	94.01	8.47	6,054
Palma - Calvià	38,484	421,638	169,747	2,686,789	91.70	91.79	92.14	6.21	15,199
Costa de Gipuzkoa	39,893	42,631	99,829	100,923	91.27	92.57	93.82	2.43	1,268
Isla de Menorca	38,845	106,580	188,887	773,127	90.39	90.74	95.63	6.62	5,011
Sur de Tenerife	44,872	188,582	237,859	1,690,210	90.38	90.94	90.80	8.26	13,574

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

Costa del Sol	237,849	316,830	885,888	1,663,134	83.94	85.85	89.76	4.60	14,776
Isla de Tenerife	86,876	232,067	437,918	2,017,128	88.43	89.05	88.21	7.70	16,842
Costa Brava	229,846	327,770	775,024	1,622,206	84.31	88.38	86.23	4.30	10,682
Costa Blanca	286,535	180,364	1,231,979	981,634	89.73	91.97	87.71	4.74	10,438
Barcelona	119,886	624,321	244,613	1,931,691	84.34	85.90	88.15	2.92	14,391
Costa Daurada	235,679	224,885	813,067	1,244,483	86.91	88.29	91.03	4.47	7,307
Isla de Gran Canaria	67,562	170,858	356,332	1,501,021	90.00	88.47	89.37	7.79	12,124
Costa Barcelona	155,064	326,483	378,817	1,370,980	87.44	82.93	86.02	3.63	7,076

Tourist site with a greater occupancy rate per month

Muro	6,995	63,496	41,372	539,190	98.83	94.72	97.06	8.24	2,677
Llucmajor	5,039	50,132	28,221	352,808	98.24	98.15	95.66	6.91	1,508
Tías	7,053	31,565	49,652	287,941	96.97	96.07	92.52	8.74	1,697
Formentera	6,848	23,309	25,356	137,342	96.54	94.13	94.18	5.39	857
Capdepera	3,506	78,647	13,513	523,859	96.51	93.77	96.71	6.54	2,422
Alcúdia	3,791	84,156	24,636	670,527	96.32	97.38	94.58	7.90	3,160
Sant Llorenç des Cardassar	2,217	96,045	13,720	760,485	95.87	95.41	91.56	7.88	3,786
Sant Josep de Sa Talaia	12,318	90,637	53,685	454,294	95.11	96.35	94.56	4.93	3,575
Santa Margalida	1,663	51,233	7,605	425,231	95.07	94.72	93.16	8.18	1,900
Ceuta	5,935	2,883	16,743	6,943	93.84	82.47	75.85	2.69	157

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

Barcelona	108,813	596,656	223,393	1,846,297	85.03	86.59	88.81	2.93	13,679
Calvià	11,355	195,458	57,869	1,407,457	90.41	90.76	92.14	7.09	7,959
Madrid	316,763	379,047	571,779	876,660	58.12	63.35	60.78	2.08	11,147
Benidorm	137,730	100,453	663,255	712,080	91.77	93.28	88.54	5.77	5,970
San Bartolomé de Tirajana	39,340	115,230	235,153	1,044,759	93.35	91.57	92.29	8.28	8,822
Palma	28,208	210,258	112,125	1,156,684	92.71	92.56	92.27	5.32	6,526
Salou	78,683	125,794	307,790	867,798	89.81	90.25	94.46	5.75	3,621
Lloret de Mar	40,882	136,932	168,535	870,041	89.25	92.76	92.03	5.84	3,464
Adeje	19,582	97,640	113,954	878,458	89.94	90.80	91.90	8.47	7,344
Pájara	14,723	85,344	96,087	830,563	91.48	92.96	90.83	9.26	5,282

* 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	12,184,902	100.00	46,492,618	100.00
Residents in Spain	6,024,734	49.44	17,221,182	37.04
Residents abroad	6,160,167	50.56	29,271,436	62.96
Total Residents abroad	6,160,167	100.00	29,271,436	100.00
Total Residents in E.U. (without Spain)	4,813,592	78.14	25,003,447	85.42
- Germany	937,150	15.21	6,164,220	21.06
- Austria	52,993	0.86	266,255	0.91
- Belgium	167,807	2.72	842,570	2.88
- Denmark	50,863	0.83	255,149	0.87
- Finland	19,104	0.31	73,043	0.25
- France	931,654	15.12	3,308,878	11.30
- Greece	10,868	0.18	31,207	0.11
- Ireland	87,885	1.43	452,959	1.55
- Italy	507,645	8.24	1,834,100	6.27
- Luxembourg	13,727	0.22	76,510	0.26
- Netherlands	249,825	4.06	1,374,776	4.70
- Poland	99,995	1.62	603,243	2.06
- Portugal	211,618	3.44	692,991	2.37
- United Kingdom	1,246,193	20.23	7,964,425	27.21
- Czech Republic	37,456	0.61	208,851	0.71
- Sweden	80,171	1.30	414,453	1.42
- Other EU countries*	108,637	1.76	439,817	1.50
Norway	42,204	0.69	220,098	0.75
Russia	122,936	2.00	729,857	2.49
Switzerland	89,910	1.46	446,381	1.52
Rest of Europe	95,005	1.54	391,692	1.34
Japan	46,797	0.76	87,995	0.30
United States of America	206,845	3.36	510,919	1.75
Rest of America	261,002	4.24	638,780	2.18
Africa	112,384	1.82	328,425	1.12
Other countries	369,494	6.00	913,842	3.12

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

Hotel Price Index (HPI). 2008 Base

August 2016

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	112.4	6.9
Andalucía	104.8	5.4
Aragón	64.8	2.5
Asturias, Principado de	94.3	5.3
Balears, Illes	131.9	8.9
Canarias	116.4	9.1
Cantabria	96.5	4.9
Castilla y León	91.9	3.8
Castilla - La Mancha	85.8	3.2
Cataluña	115.2	5.4
Comunitat Valenciana	109.8	10.2
Extremadura	94.2	1.6
Galicia	96.5	3.3
Madrid, Comunidad de	83.8	3.1
Murcia, Región de	91.0	5.5
Navarra, Comunidad Foral de	90.8	2.6
País Vasco	113.1	7.0
Rioja, La	93.3	2.3
Ceuta	100.7	-0.2
Melilla	95.4	0.0

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	112.4	6.9
HOTELS: Gold stars		
Five	107.0	5.5
Fourth	108.9	7.0
Three	120.7	9.0
Two	105.8	1.2
One	114.9	6.0
HOSTALS: Silver stars		
Three and two	108.7	5.5
One	108.3	3.6

Indicators on the Profitability of the Hotel Sector

August 2016

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	100.2	5.2	79.6	8.9
Andalucía	114.9	6.4	88.5	8.6
Aragón	59.3	2.0	32.0	14.0
Asturias, Principado de	78.5	9.5	61.3	13.3
Balears, Illes	119.0	5.5	111.6	6.9
Canarias	94.5	5.2	85.1	12.6
Cantabria	89.7	2.0	72.2	8.1
Castilla y León	57.1	2.1	30.6	7.9
Castilla - La Mancha	54.7	2.9	20.6	12.4
Cataluña	101.6	3.0	86.2	6.3
Comunitat Valenciana	102.8	12.4	84.6	14.0
Extremadura	59.1	2.3	25.1	9.5
Galicia	64.7	0.9	42.4	5.3
Madrid, Comunidad de	69.8	4.1	41.2	8.6
Murcia, Región de	81.0	-0.1	55.7	12.5
Navarra, Comunidad Foral de	64.3	3.3	43.5	7.0
País Vasco	100.2	6.4	84.7	8.5
Rioja, La	62.0	-1.9	40.2	5.1
Ceuta	72.1	-2.8	50.0	3.7
Melilla	67.1	0.9	53.3	18.3

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	100.2	5.2	79.6	8.9
HOTELS: Gold stars				
Five	213.3	3.7	167.8	2.6
Four	111.5	7.2	96.2	10.4
Three	88.2	5.1	74.0	7.7
Two	65.4	-0.5	46.5	6.2
One	64.2	3.6	41.4	11.5
GUESTHOUSES: Silver stars				
Three and two	57.1	-12.3	31.7	-5.9
One	53.2	2.4	27.9	10.4

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

Indicators on Profitability (ANNEX OF TABLES) - August 2016

23rd September 2016