

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

Overnight stays in hotel establishments increase 0.5% in August as compared with the same month of 2016

Hotels invoice an average of 105.6 euros per occupied room, which means an annual increase of 6.0%

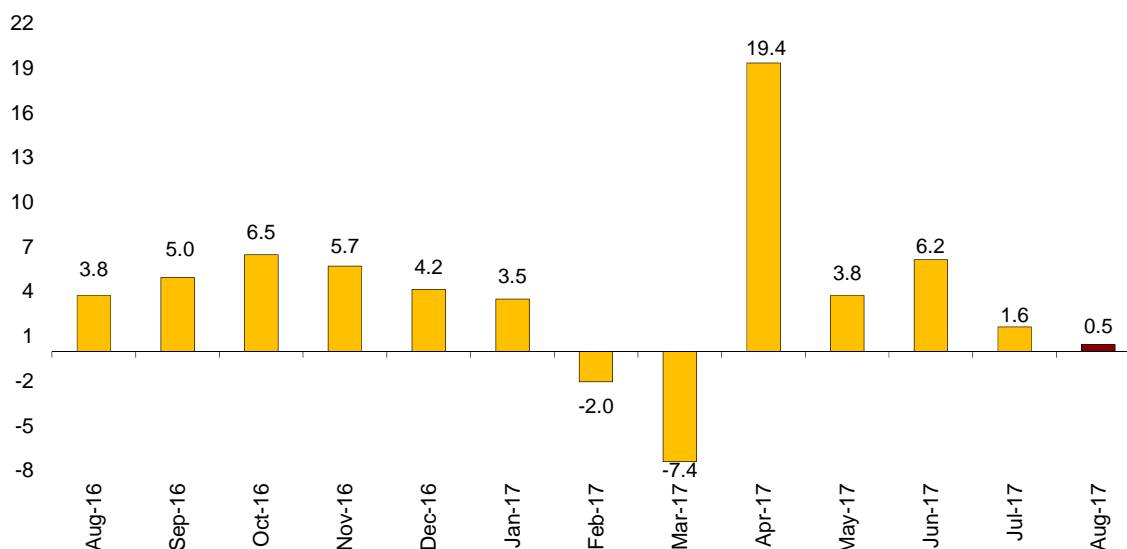
During the month of August, a total of 46.7 million overnight stays were registered in hotel establishments, 0.5% more than in the same month of 2016. Overnight stays of travellers resident in Spain decreased 1.2%, and those of non-residents increased 1.5%.

The average stay decreased 0.5% as compared with August 2016, standing at 3.8 overnight stays per traveller.

During the aggregate July-August period, the number of overnight stays increased 1.0% as compared with the same period of 2016. Overnight stays by residents dropped 1.6%, whilst those by non-residents grew 2.5%.

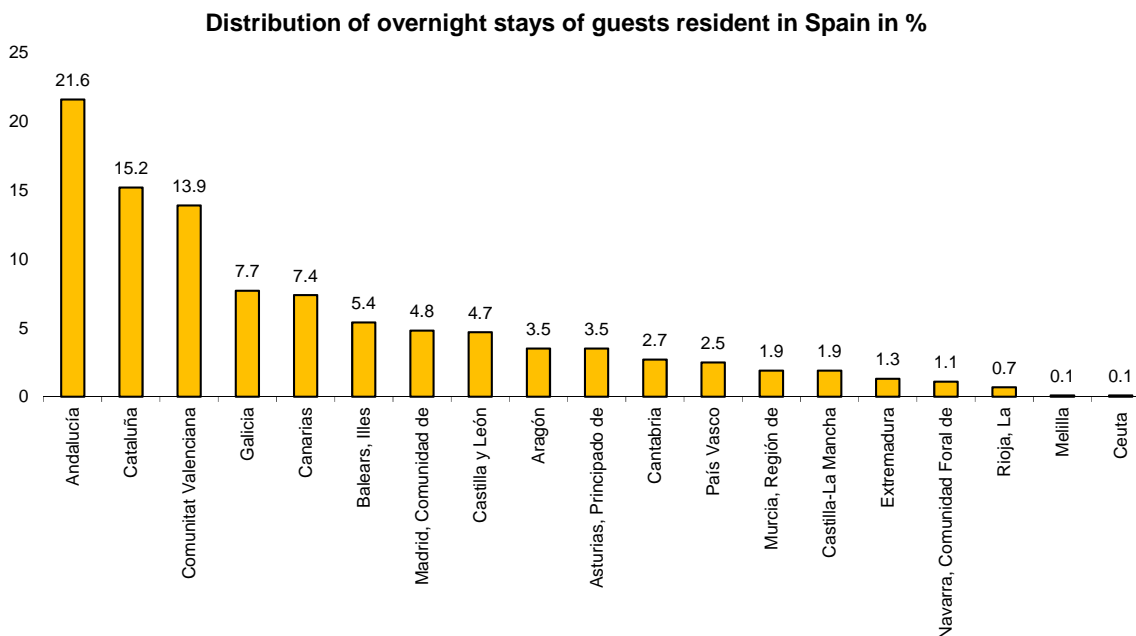
During the first eight months of 2017, overnight stays increased by 3.1% as compared with the same period of the previous year.

Annual rates of overnight stays in %

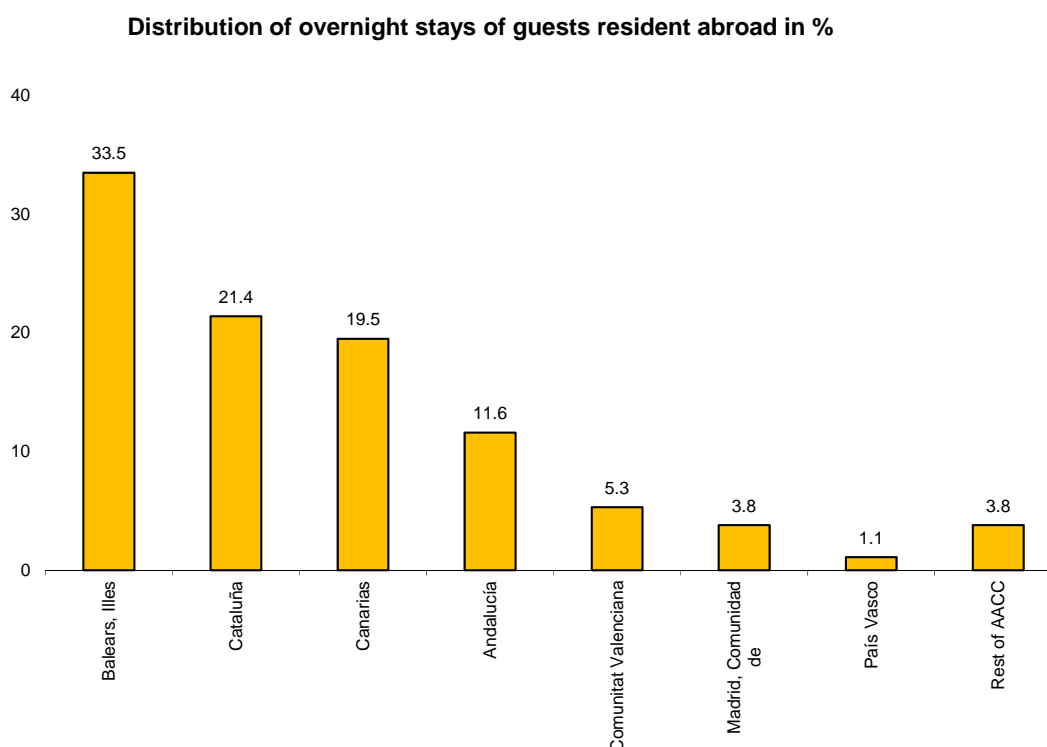


Destinations

Andalucía, Cataluña, Comunitat Valenciana and Galicia were the main destinations of travellers resident in Spain in August, with annual variation rates in the number of overnight stays of -4.5%, -5.5%, -4.1% and 6.5%, respectively.



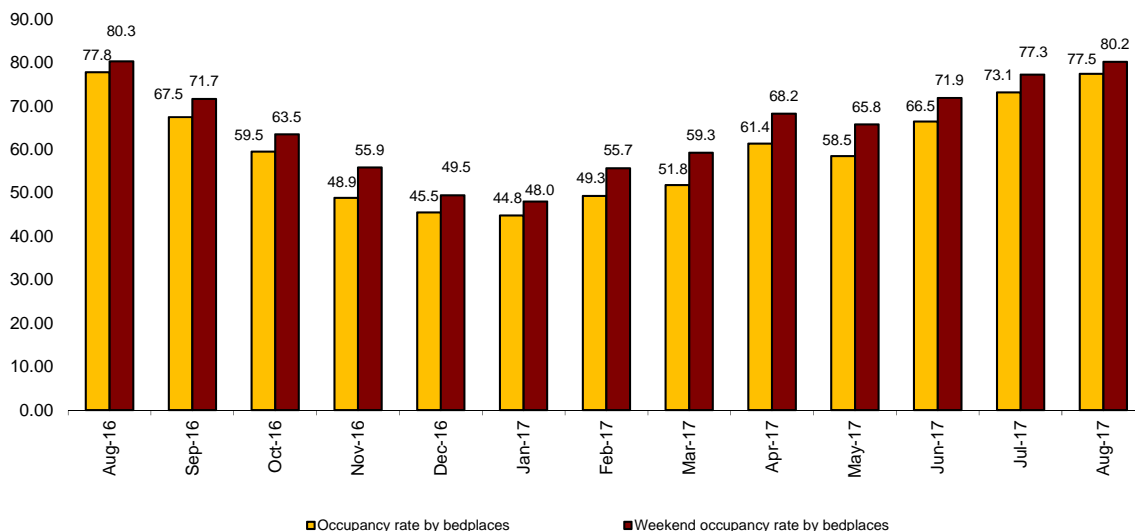
The main destination chosen by non-residents travellers was Illes Balears, with 33.5% of total overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 1.4% as compared to August 2016. The following destinations of non-residents were Cataluña (with 21.4% of the total overnight stays and an increase of 1.6%) and Canarias (with 19.5% of the total and a decrease of 0.1%).



Hotel occupancy

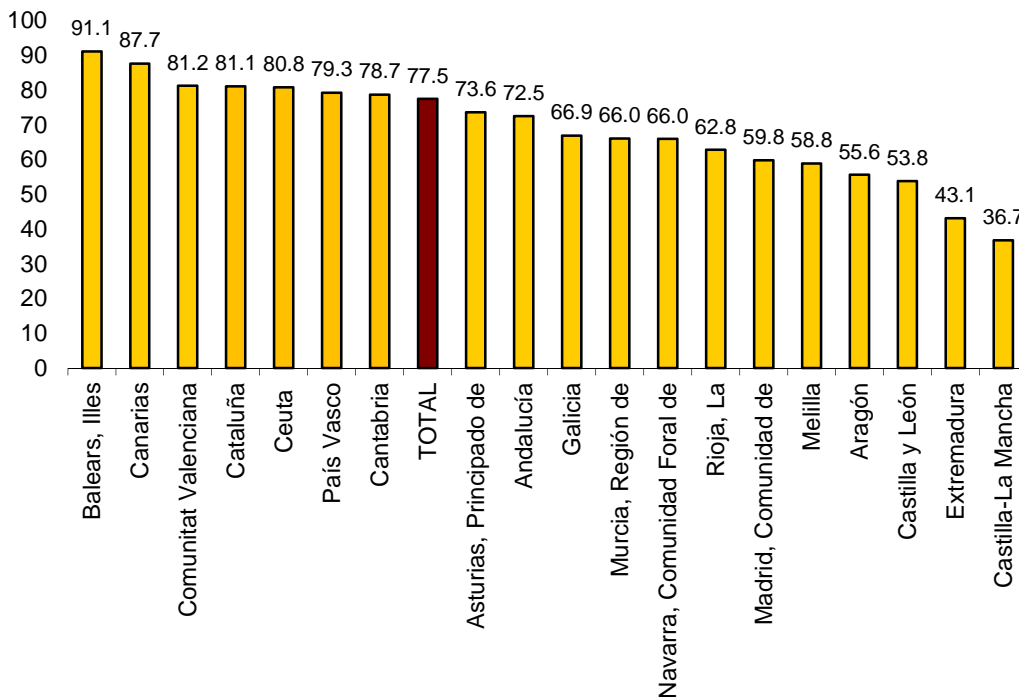
In August, 77.5% of the available bedplaces were covered, with an annual decrease of 0.4%. The weekend occupancy rate by bedplaces decreased by 0.2%, standing at 80.2%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears showed the highest occupancy rate by bedplaces during August (91.1%). It was followed by Canarias (87.7%) and Comunitat Valenciana (81.2%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, the island of Mallorca reached the highest occupancy rate by bedplaces (91.9%), and Palma-Calvià registered the highest weekend occupancy rate (93.9%). La Costa del Sol registered the highest number of overnight stays, with 2.4 million.

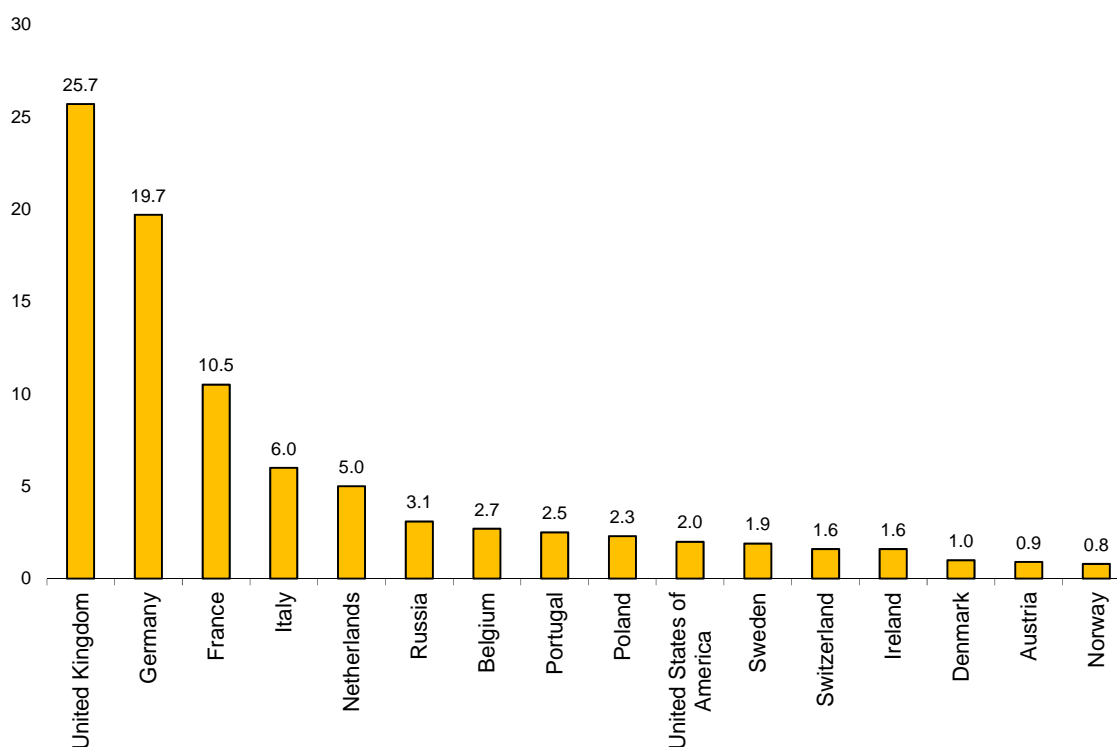
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Formentera showed the highest occupancy rate by bedplaces (97.5%) and Pollença the greatest weekend occupancy rate (97.4%).

Overnight stays according to the country of origin of the travellers

In August, travellers from the United Kingdom and Germany concentrated 25.7% and 19.7% of total overnight stays of non-residents in hotel establishments, respectively. The British market decreased by 3.9% and the German by 5.0%.

Overnight stays of travellers from France, Italy, and Netherlands (the following countries of origin) registered annual rates of -5.4%, -2.2% and 7.1% respectively.

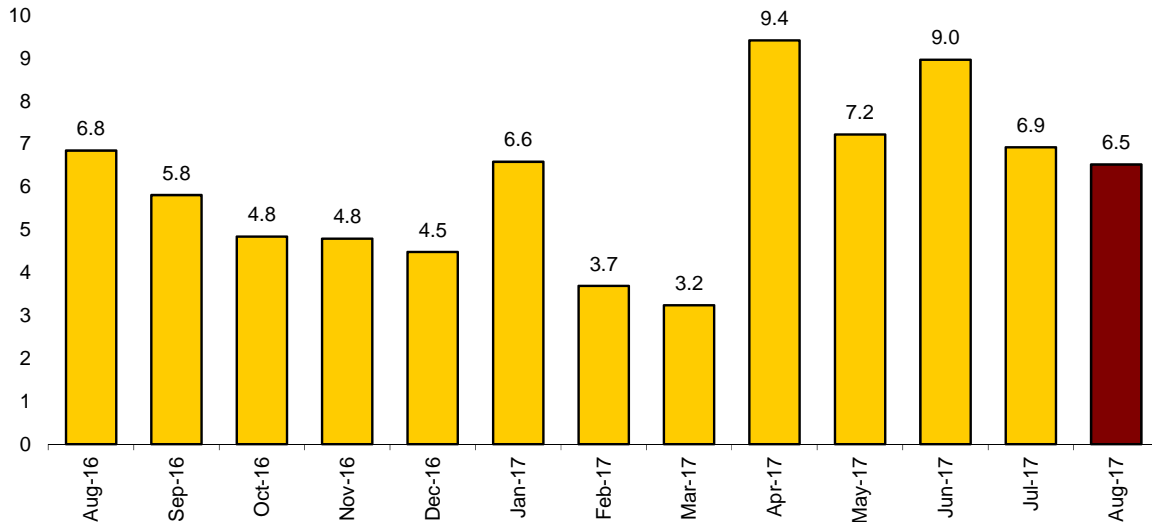
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 6.5% in August, which is 0.4 points less than that of the previous month and 0.3 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 August (accounting for 76.6% of the total weight). Hotel prices increased by 9.7% in the annual rate in Cataluña, 7.2% in Illes Balears, 6.6% in Canarias and 4.5% in Andalucía.

By hotel category, hotel prices increased in all of them. In two-golden-star establishments (7.8%), in three-golden-star establishments (7.7%), in one-golden-star establishments (7.4%), in four-golden-star establishments (6.3%), in one-silver-star establishments (5.5%), in three and two-silver-star establishments (4.7%) and in five-golden-star establishments (4.2%).

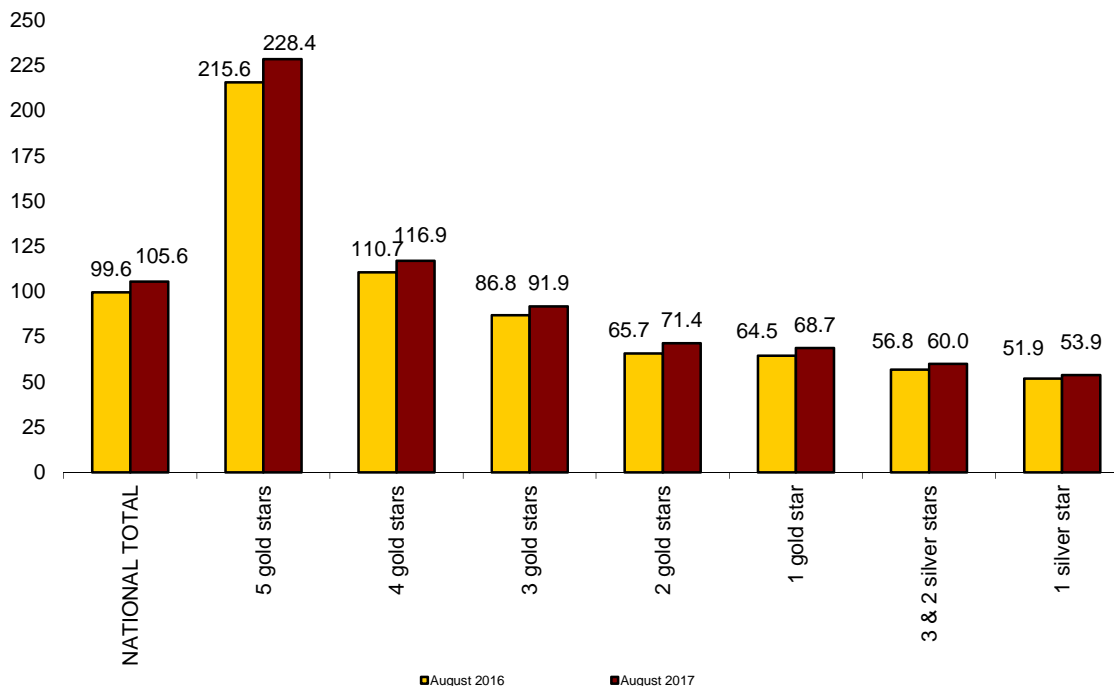
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 105.6 euros in August, which indicates an increase of 6.0% as compared with the same month of 2016.

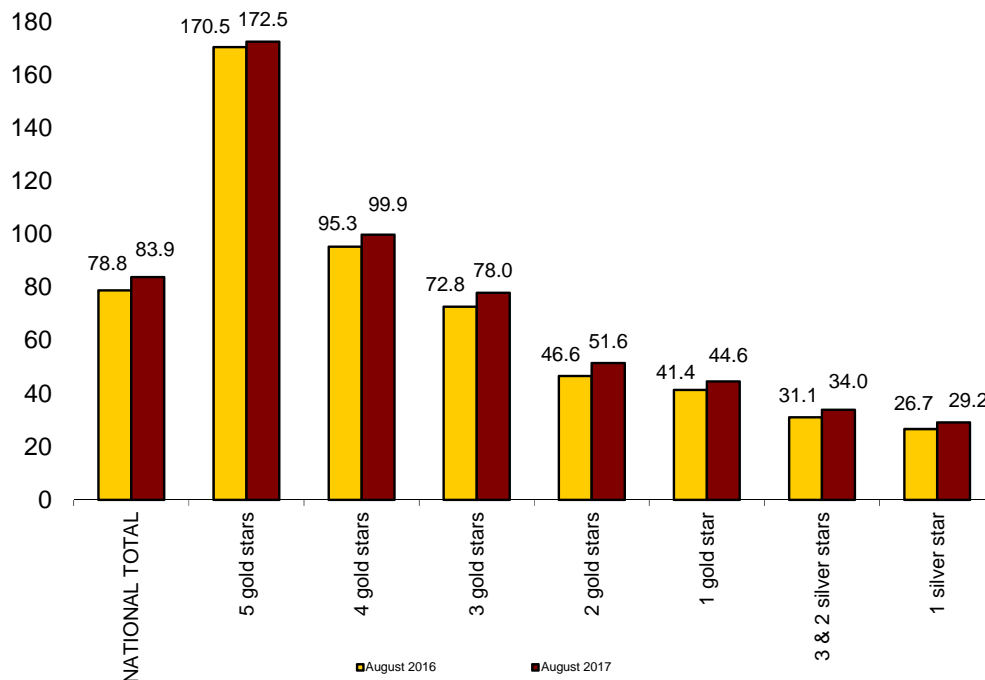
Meanwhile, the average daily income per room available (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 83.9 euros, with an increase of 6.4%.

By category, the average invoicing was 228.4 euros for five-star hotels, 116.9 euros for four-star hotels and 91.9 euros for three-star hotels. Income per available room for these same categories were 172.5, 99.9 and 78.0 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)

August 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	12,301,182	5,932,359	6,368,823	46,720,017	17,031,650	29,688,367	3.80
HOTELS: Golden stars							
Five	594,089	177,095	416,995	2,472,551	546,468	1,926,083	4.16
Four	5,268,983	2,341,742	2,927,242	22,269,326	7,543,870	14,725,456	4.23
Three	3,580,686	1,657,890	1,922,796	14,590,972	4,896,145	9,694,827	4.07
Two	1,116,065	662,958	453,107	3,139,105	1,562,114	1,576,991	2.81
One	470,854	299,866	170,989	1,176,616	714,159	462,457	2.50
INNS: Silver stars							
Two and three	708,958	463,331	245,627	1,622,690	1,006,955	615,735	2.29
One	561,546	329,478	232,068	1,448,757	761,939	686,818	2.58
Annual rate	0.93	-1.02	2.82	0.47	-1.24	1.47	-0.46
Cumulative annual rate	3.63	0.90	6.31	3.12	0.35	4.61	-0.49

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	16,903	866,690	1,811,045	77.46	80.16	79.02	275,848
HOTELS: Golden stars							
Five	312	47,686	99,635	76.56	76.83	77.10	35,957
Four	2,558	368,912	800,864	82.85	84.22	85.10	132,317
Three	3,011	248,106	521,608	82.71	85.96	84.02	71,090
Two	2,178	70,350	138,272	69.86	75.06	72.00	14,644
One	1,422	31,127	60,388	61.68	67.91	64.47	5,827
INNS: Silver stars							
Two and three	3,293	51,108	98,085	52.56	58.24	55.74	8,628
One	4,129	49,400	92,194	50.15	54.64	53.59	7,385
Annual rate	-0.31	0.54	0.96	-0.40	-0.16	0.36	4.74

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	107,063	1,129,897	534,873	7,582,883	91.91	93.03	92.27	6.56	44,337
Palma - Calvià	51,614	470,370	234,698	2,783,737	91.32	93.90	91.62	5.78	17,812
Sur de Gran Canaria	51,464	160,374	305,329	1,451,620	91.19	91.25	92.00	8.29	11,254
Isla de Fuerteventura	31,796	141,431	184,391	1,321,135	90.14	88.32	89.50	8.69	8,973
Isla de Menorca	35,774	123,543	155,949	777,454	89.55	88.61	94.37	5.86	5,053
Costa de Gipuzkoa	36,218	49,251	95,362	107,633	89.03	91.40	92.90	2.38	1,280
Islas de Ibiza-Formentera	58,331	290,962	228,110	1,597,763	88.67	90.90	89.91	5.23	11,565
Isla de Gran Canaria	69,811	176,823	363,071	1,529,516	88.61	89.30	89.58	7.67	12,263

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

Costa del Sol	212,701	336,976	762,518	1,691,408	82.29	84.16	88.52	4.46	15,725
Isla de Tenerife	90,314	224,790	456,190	1,943,447	86.24	86.41	85.01	7.62	17,862
Costa Brava	202,809	327,946	683,391	1,582,916	81.98	84.75	83.82	4.27	10,428
Costa Blanca	270,598	205,194	1,103,132	1,077,137	87.38	89.45	87.52	4.58	10,681
Costa Daurada	223,093	252,280	739,364	1,391,127	88.46	91.22	90.68	4.48	7,577
Barcelona	105,683	622,291	222,498	1,903,507	80.94	81.14	88.02	2.92	14,930
Sur de Tenerife	45,691	183,197	241,489	1,630,179	87.29	88.01	86.84	8.18	14,334
Costa Barcelona	136,542	313,351	406,432	1,394,003	85.65	85.90	85.96	4.00	7,545

Tourist site with a greater occupancy rate per month

Formentera	6,286	21,480	23,066	131,014	97.50	93.95	95.48	5.55	810
Pollença	2,815	27,162	11,268	168,799	96.45	97.42	95.02	6.01	1,414
Santa Margalida	5,922	49,984	64,324	376,849	95.10	94.99	94.18	7.89	2,115
Santa Susanna	14,187	41,384	60,667	304,269	94.70	93.18	91.02	6.57	1,348
Capdepera	4,411	79,117	17,587	555,062	93.37	92.81	88.74	6.86	3,151
Salou	77,573	156,827	270,879	989,414	93.24	95.05	94.05	5.38	3,863
Ciutadella de Menorca	12,670	48,064	65,459	346,233	93.06	89.96	94.50	6.78	1,948
Llucmajor	7,527	55,959	34,476	330,221	92.78	97.24	95.45	5.74	1,553
San Bartolomé de Tirajana	40,457	117,700	237,843	1,059,965	92.53	92.84	92.14	8.21	8,919
Oliva (La)	7,349	27,174	50,463	267,458	92.49	82.24	93.42	9.21	2,026

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

Barcelona	96,025	597,555	202,625	1,828,527	81.80	81.89	88.52	2.93	14,210
Madrid	290,695	415,464	508,983	1,044,436	61.33	63.09	64.02	2.20	11,414
Calvià	20,232	208,725	129,991	1,401,539	91.38	91.96	92.53	6.69	8,959
Benidorm	134,160	110,330	635,583	745,257	88.54	89.03	87.97	5.65	6,125
Palma	29,897	245,711	111,376	1,234,227	90.92	94.66	89.96	4.88	7,743
Adeje	20,897	96,285	120,286	876,783	87.82	87.17	85.89	8.51	8,092
Lloret de Mar	36,128	133,835	145,632	796,239	89.29	90.06	90.95	5.54	3,206
Pájara	17,055	86,008	100,174	813,283	91.02	92.42	89.43	8.86	5,498
Sant Llorenç des Cardassar	2,361	103,226	13,725	740,418	91.26	91.12	92.92	7.14	4,215
Alcúdia	4,515	86,250	27,825	626,406	88.21	94.72	95.45	7.21	3,217

* 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	12,301,182	100.00	46,720,017	100.00
Residents in Spain	5,932,359	48.23	17,031,650	36.45
Residents abroad	6,368,823	51.77	29,688,367	63.55
Total Residents abroad	6,368,823	100.00	29,688,367	100.00
Total Residents in E.U. (without Spain)	4,819,079	75.67	24,659,456	83.06
- Germany	893,212	14.02	5,854,777	19.72
- Austria	50,592	0.79	264,333	0.89
- Belgium	166,530	2.61	797,405	2.69
- Denmark	56,427	0.89	288,651	0.97
- Finland	20,848	0.33	80,207	0.27
- France	901,332	14.15	3,119,025	10.51
- Greece	15,594	0.24	40,810	0.14
- Ireland	94,610	1.49	479,451	1.61
- Italy	489,923	7.69	1,784,120	6.01
- Luxembourg	14,304	0.22	70,972	0.24
- Netherlands	270,514	4.25	1,496,705	5.04
- Poland	122,431	1.92	691,671	2.33
- Portugal	229,781	3.61	742,579	2.50
- United Kingdom	1,214,902	19.08	7,619,754	25.67
- Czech Republic	36,827	0.58	221,923	0.75
- Sweden	105,749	1.66	571,989	1.93
- Other EU countries*	135,504	2.13	535,082	1.80
Norway	42,796	0.67	227,318	0.77
Russia	143,418	2.25	919,217	3.10
Switzerland	94,756	1.49	484,250	1.63
Rest of Europe	116,116	1.82	478,416	1.61
Japan	48,690	0.76	98,118	0.33
United States of America	238,691	3.75	588,581	1.98
Rest of America	320,011	5.02	791,390	2.67
Africa	114,057	1.79	375,198	1.26
Other countries	431,209	6.77	1,066,423	3.59

*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 2017

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	119.6	6.5
Andalucía	109.9	4.5
Aragón	66.1	2.1
Asturias, Principado de	98.6	4.4
Balears, Illes	141.9	7.2
Canarias	124.1	6.6
Cantabria	102.4	7.3
Castilla y León	95.4	3.6
Castilla - La Mancha	87.7	2.6
Cataluña	125.1	9.7
Comunitat Valenciana	114.7	4.7
Extremadura	94.7	0.4
Galicia	101.9	5.6
Madrid, Comunidad de	87.7	4.6
Murcia, Región de	91.8	1.4
Navarra, Comunidad Foral de	93.2	1.5
País Vasco	118.2	4.8
Rioja, La	92.8	-0.6
Ceuta	105.3	4.0
Melilla	94.1	-1.4

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	119.6	6.5
HOTELS: Gold stars		
Five	111.2	4.2
Fourth	116.1	6.3
Three	128.6	7.7
Two	115.7	7.8
One	124.6	7.4
HOSTALS: Silver stars		
Three and two	114.1	4.7
One	113.2	5.5

Indicators on the Profitability of the Hotel Sector

August 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	105.6	6.0	83.9	6.4
Andalucía	117.7	2.9	90.5	2.9
Aragón	59.7	0.8	33.4	5.3
Asturias, Principado de	81.4	3.0	62.0	0.6
Balears, Illes	126.7	7.8	117.7	6.7
Canarias	100.5	6.9	88.5	4.3
Cantabria	96.7	8.9	77.3	8.4
Castilla y León	59.1	3.4	32.5	6.0
Castilla - La Mancha	54.7	0.0	21.3	3.4
Cataluña	111.6	9.9	94.4	10.0
Comunitat Valenciana	102.5	1.3	85.0	2.2
Extremadura	58.6	-1.0	26.1	3.7
Galicia	68.7	4.3	46.9	9.6
Madrid, Comunidad de	74.3	6.2	46.9	15.3
Murcia, Región de	82.1	2.5	53.6	-0.9
Navarra, Comunidad Foral de	67.4	5.9	47.0	10.1
País Vasco	104.1	4.1	87.9	4.4
Rioja, La	63.6	3.1	40.7	1.0
Ceuta	74.9	3.9	53.3	5.7
Melilla	65.9	-1.8	48.5	-9.2

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	105.6	6.0	83.9	6.4
HOTELS: Gold stars				
Five	228.4	6.0	172.5	1.2
Four	116.9	5.6	99.9	4.8
Three	91.9	5.9	78.0	7.2
Two	71.4	8.7	51.6	10.7
One	68.7	6.6	44.6	7.7
GUESTHOUSES: Silver stars				
Three and two	60.0	5.7	34.0	9.4
One	53.9	3.8	29.2	9.6

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room