

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

Overnight stays in hotel establishments increase 2.2% in September as compared with the same month of 2016

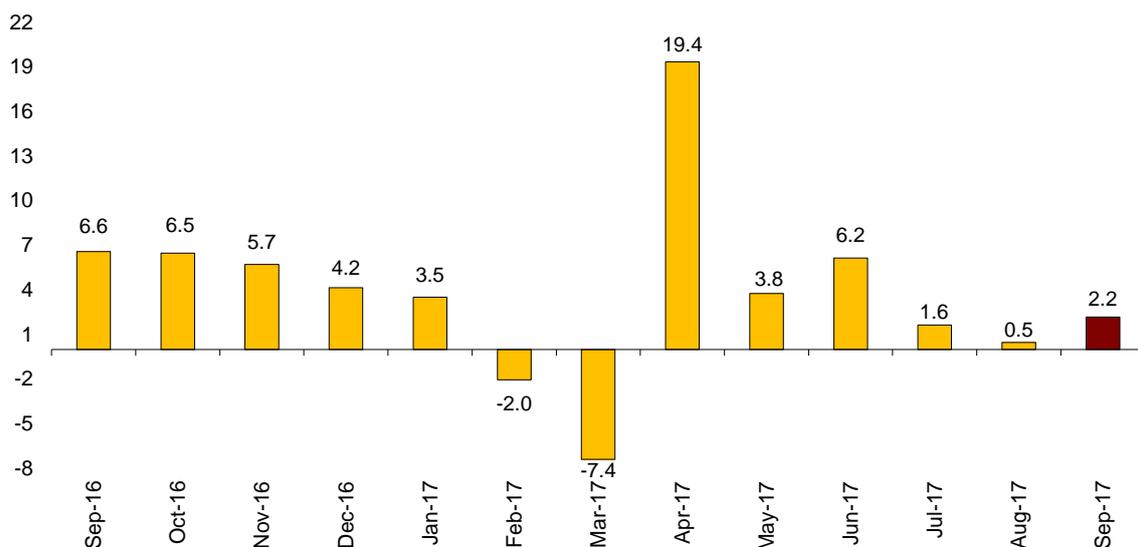
Hotels invoice an average of 89.8 euros per occupied room, which means an annual increase of 6.7%

During the month of September, a total of 38 million overnight stays were registered in hotel establishments, 2.2% more than in the same month of 2016. Overnight stays by travellers resident in Spain increased by 0.9% and those of non-residents did so by 2.7%.

The average stay decreased 1.9% as compared with September 2016, and stood at 3.5 overnight stays per traveller.

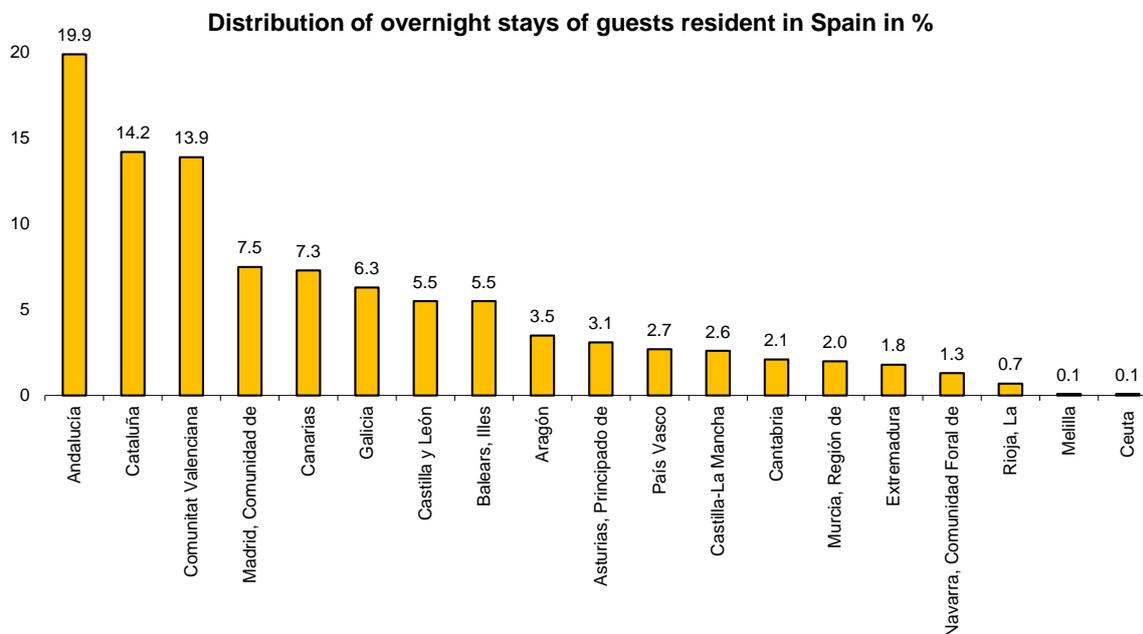
During the first nine months of 2016, overnight stays increased by 3.0% as compared with the same period of the previous year.

Annual rates of overnight stays in %

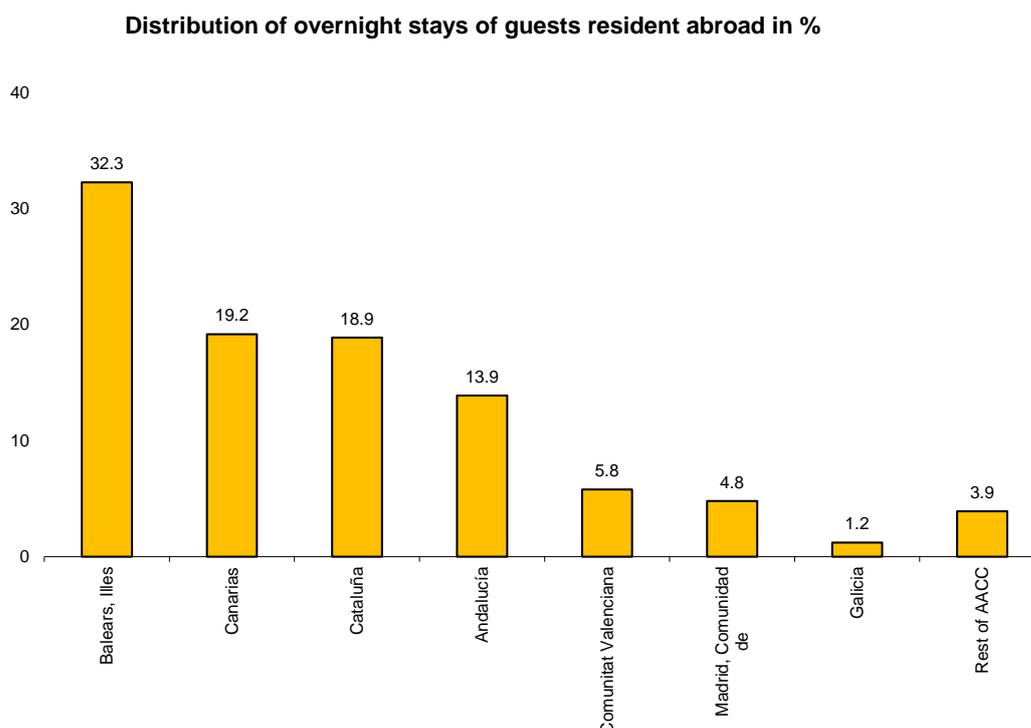


Destinations

Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of travellers resident in Spain in September, with annual variation rates in the number of overnight stays of -4.2%, 0.3%, -3.0% and -4.8%, respectively.



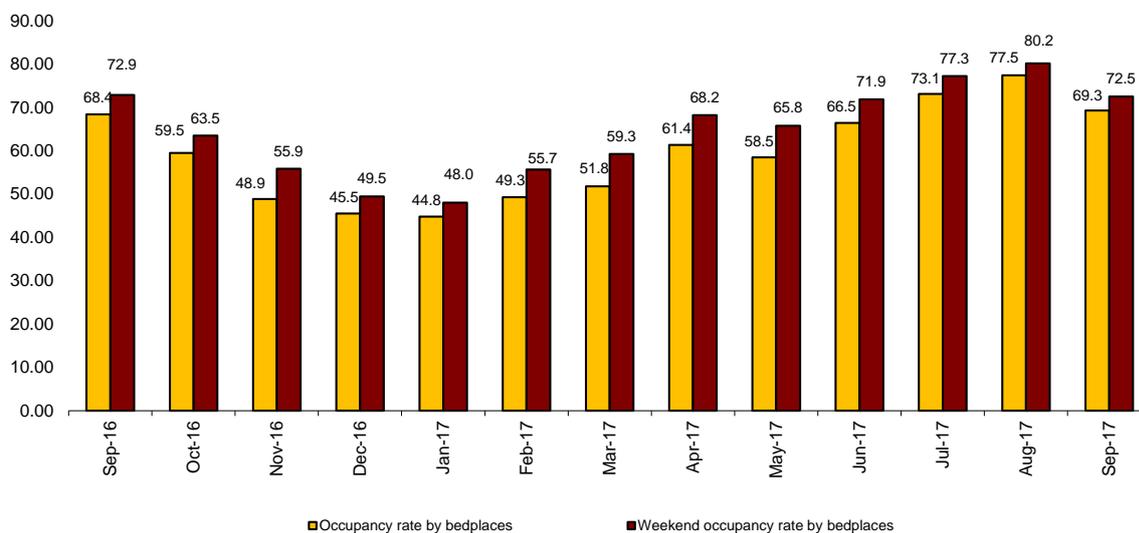
The main destination chosen by non-residents travellers was Illes Balears, with 32.3% of total overnight stays. In this Autonomous Community, overnight stays of foreigners decreased by 1.5% as compared to September 2016. The following destinations of non-residents were Canarias (with 19.2% of the total overnight stays and an increase of 1.5%) and Cataluña (with 18.9% of the total and an increase of 4.3%).



Hotel occupancy

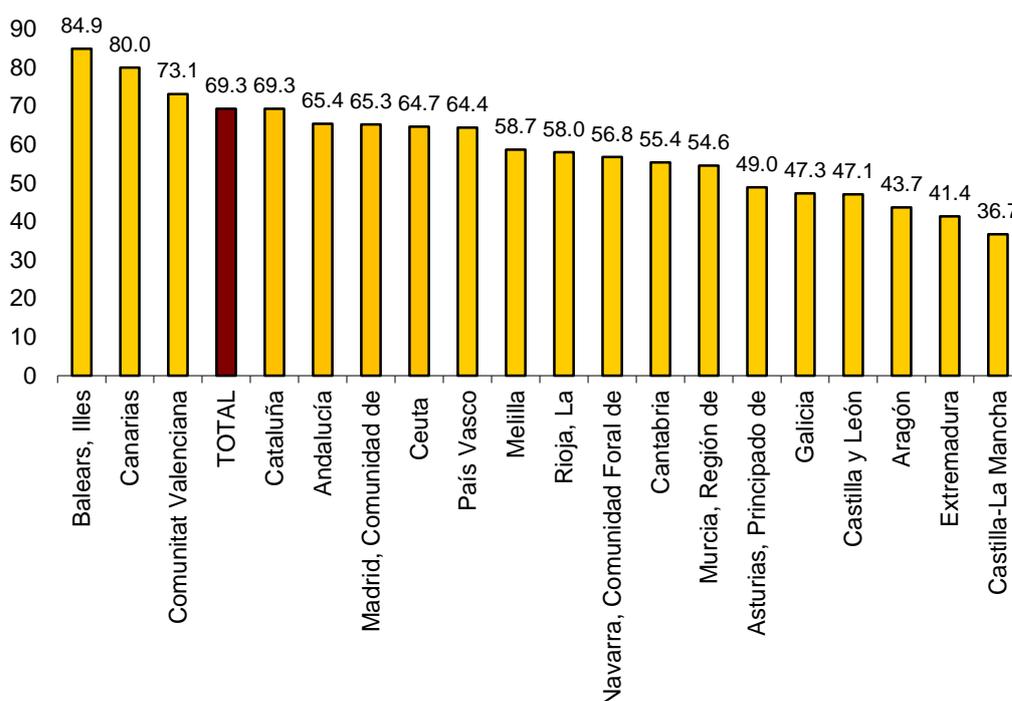
In September, 69.3% of the available bedplaces were occupied, indicating an annual increase of 1.3%. The weekend occupancy rate by bedplaces decreased by 0.5%, standing at 72.5%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears showed the highest occupancy rate by bedplaces in September (84.9%). It was followed by Canarias (80.0%) and Comunitat Valenciana (73.1%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the island of Mallorca registered the highest occupancy rate by bedplaces (86.2%), and the islands of Ibiza-Formentera registered the highest weekend occupancy rate (85.4%). La Costa del Sol registered the highest number of overnight stays, with 2.0 million.

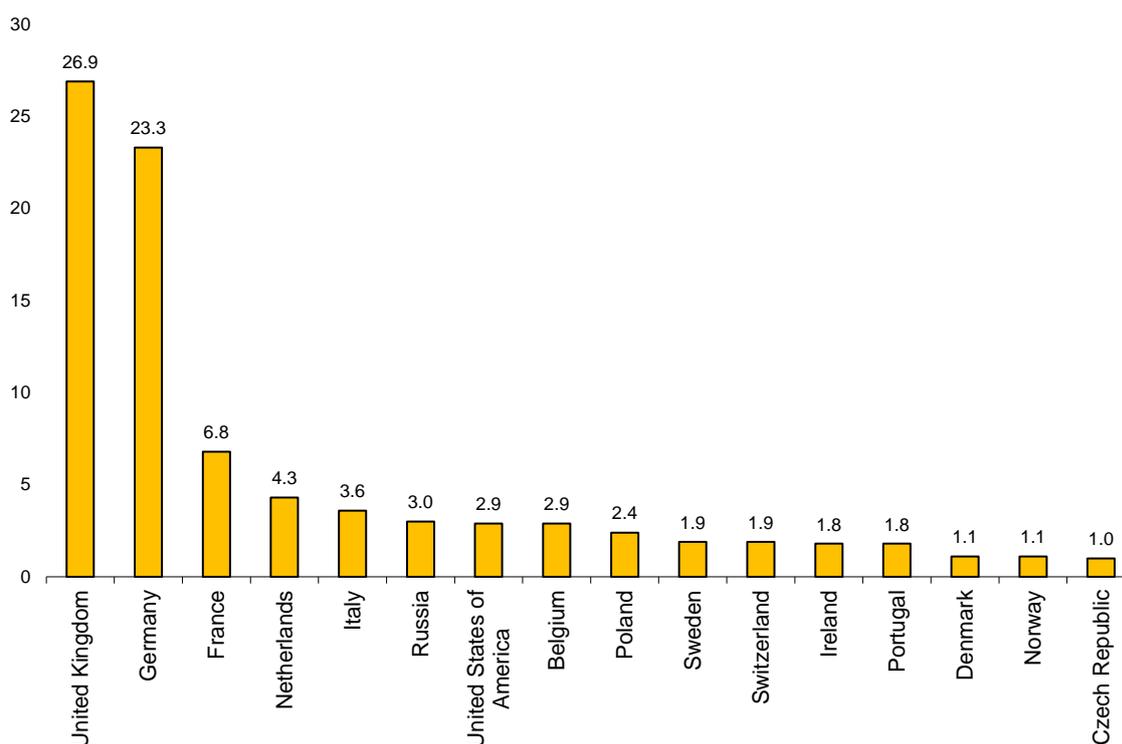
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Lluçmajor presented both the greatest level of occupancy by bedplaces (93.5%), as the greatest weekend occupancy (93.5%).

Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany accounted for 26.9% and 23.3%, respectively, of total overnight stays of non-residents in hotel establishments in September. The annual rate decreased by 2.2% for both the British and German markets.

Overnight stays of travellers from France, the Netherlands and Italy (the following countries of origin) registered annual rates of -3.7%, 9.9% and -3.5%, respectively.

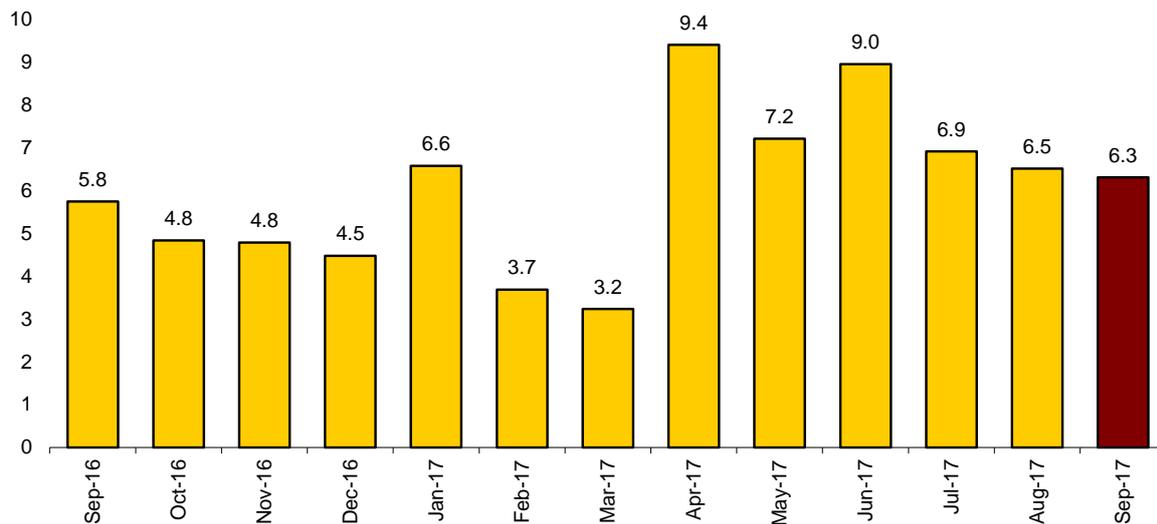
Distribution of overnight stays of residents abroad from the main countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 6.3% in September, which was 0.2 points lower than that registered last month and 0.5 points higher than that registered one 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 September (accounting for 75.1% of the total weight). Hotel prices increased by 7.3% in the annual rate in Cataluña, 6.8% in Illes Balears, 5.4% in Canarias and 4.8% in Andalucía.

By hotel category, hotel prices increased in all of them. In one-silver-star establishments (8.9%), in three-gold-star establishments (8.6%), in four-gold-star establishments (6.0%), in one-gold-star, three and two-silver-star establishments (5.8%), in two-gold-star establishments (5.3%) and in five-gold-star establishments (3.1%).

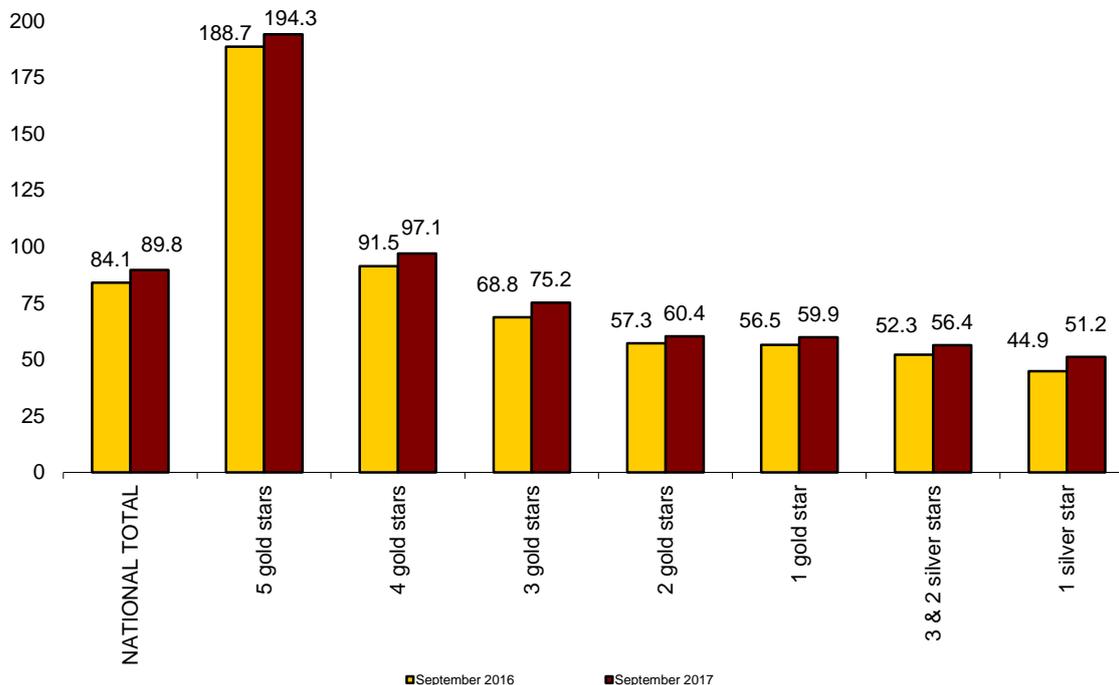
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 89.8 euros in September, which means an increase of 6.7% as compared with the same month of 2016.

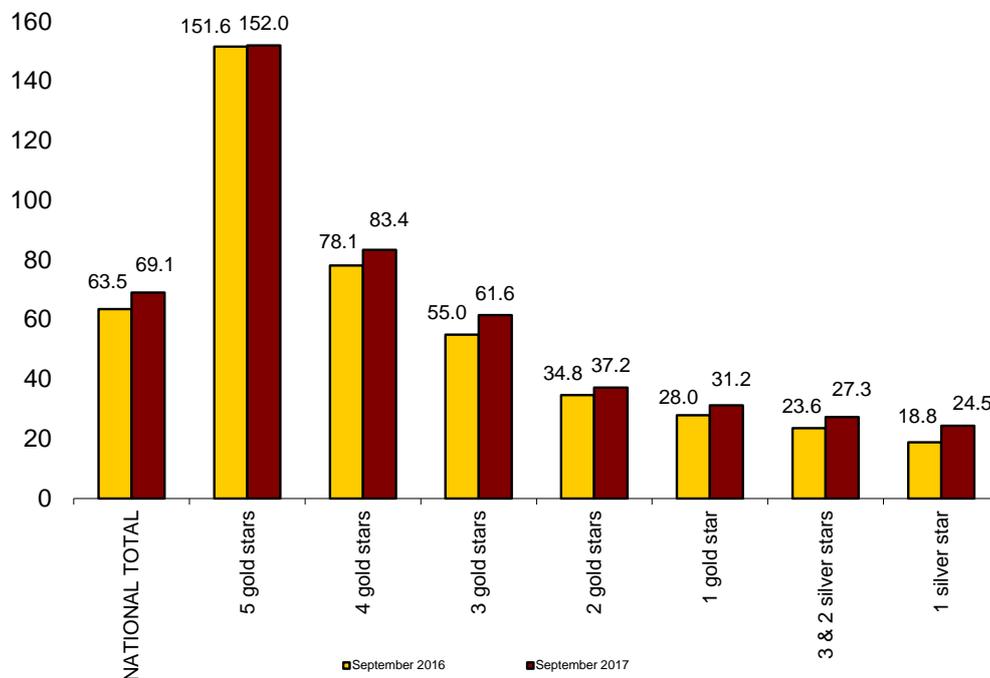
Meanwhile, the average daily income per room available (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 69.1 euros, with an increase of 8.8%.

By category, the average invoicing was 194.3 euros for five-star hotels, 97.1 euros for four-star hotels and 75.2 euros for three-star hotels. Income per available room for these same categories were 152.0, 83.4 and 61.6 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)

September 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	10,926,097	4,745,234	6,180,862	38,024,241	11,312,979	26,711,263	3.48
HOTELS: Golden stars							
Five	600,876	163,271	437,605	2,109,589	373,556	1,736,033	3.51
Four	4,906,645	1,980,154	2,926,491	18,523,370	4,959,353	13,564,017	3.78
Three	3,136,273	1,303,339	1,832,934	12,099,914	3,378,115	8,721,799	3.86
Two	853,886	481,242	372,645	2,231,300	1,017,572	1,213,728	2.61
One	343,076	202,279	140,797	743,593	396,015	347,578	2.17
INNS: Silver stars							
Two and three	573,836	345,239	228,597	1,213,429	652,568	560,861	2.11
One	511,506	269,711	241,795	1,103,047	535,800	567,247	2.16
Annual rate	4.19	1.55	6.31	2.17	0.86	2.73	-1.94
Cumulative annual rate	3.70	0.98	6.31	2.99	0.41	4.34	-0.69

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	16,384	855,854	1,787,221	69.33	72.54	76.79	263,488
HOTELS: Golden stars							
Five	314	47,833	99,931	69.53	73.17	78.71	35,081
Four	2,546	368,428	799,746	75.45	78.13	85.85	127,622
Three	2,955	245,506	515,627	75.90	78.34	81.59	67,413
Two	2,121	67,755	132,773	55.31	61.04	61.20	12,987
One	1,302	28,540	55,410	44.50	50.42	51.77	5,067
INNS: Silver stars							
Two and three	3,178	49,463	94,661	42.40	48.74	47.74	8,102
One	3,969	48,329	89,072	41.16	44.32	47.90	7,216
Annual rate	-1.35	0.44	0.83	1.33	-0.52	1.65	4.57

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 Mallorca	79,441	1,022,223	349,593	6,532,418	86.16	84.51	89.97	6.25	42,642
Palma - Calvià	43,449	429,229	209,626	2,333,457	84.58	83.54	88.25	5.38	16,737
Islas de Ibiza-Formentera	49,845	283,266	173,661	1,433,167	83.01	85.44	85.32	4.82	11,142
Sur de Gran Canaria	32,614	146,848	170,794	1,294,373	82.56	81.94	91.96	8.16	11,422
Costa Blanca	187,184	219,341	713,993	1,093,768	82.49	84.94	86.78	4.45	10,164
Isla de Lanzarote	23,831	119,523	121,526	806,988	82.35	81.69	94.88	6.48	6,737
Sur de Tenerife	34,470	180,336	155,968	1,441,168	80.70	80.74	88.36	7.44	14,249
Isla de Fuerteventura	22,639	125,045	117,189	1,113,807	80.63	79.70	90.83	8.34	8,840

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

Costa del Sol	137,768	380,223	380,848	1,705,820	76.10	79.39	88.40	4.03	15,058
Isla de Tenerife	72,136	222,580	308,716	1,750,971	79.71	80.29	86.22	6.99	17,746
Barcelona	125,304	600,278	234,576	1,636,277	74.36	76.16	88.50	2.58	15,197
Isla de Gran Canaria	56,097	161,738	231,235	1,354,460	80.25	80.42	89.58	7.28	12,479
Costa Brava	142,184	267,996	360,986	1,178,394	67.25	69.72	74.22	3.75	8,921
Costa Daurada	168,126	171,913	450,252	1,087,893	73.78	77.63	80.87	4.52	6,824
Costa Barcelona	134,335	265,539	286,576	1,084,736	74.03	73.91	83.36	3.43	7,365
Costa de la Luz (Cádiz)	124,165	97,565	400,050	460,436	69.14	73.02	80.05	3.88	6,814

Tourist site with a greater occupancy rate per month

Llucmajor	8,335	53,962	34,729	282,833	93.49	93.51	94.26	5.10	1,423
Santa Margalida	6,710	42,365	14,779	361,194	91.21	79.28	90.61	7.66	2,048
Cambrils	14,325	19,372	47,616	150,693	89.17	86.35	90.93	5.88	993
Muro	2,153	58,343	9,458	453,898	88.93	89.10	94.74	7.66	2,756
Alcúdia	2,314	74,816	9,423	554,318	88.31	85.53	91.29	7.31	2,977
Santa Susanna	9,177	40,887	24,541	261,577	88.05	77.49	89.14	5.72	1,320
Pollença	1,235	22,830	2,593	151,681	87.56	90.07	95.26	6.41	1,342
Benidorm	87,203	116,275	447,340	723,360	87.07	88.54	89.92	5.75	5,864
Palma	26,732	237,593	77,808	1,106,878	86.91	86.26	87.74	4.48	7,363
Puerto de La Cruz	21,724	31,513	118,015	262,348	86.61	87.40	86.82	7.14	2,597

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

Barcelona	117,632	574,281	217,891	1,569,901	75.24	77.15	88.99	2.58	14,435
Madrid	339,740	488,445	571,506	1,137,574	67.40	71.47	83.22	2.06	11,769
Calvià	15,368	184,606	130,004	1,138,760	82.51	81.27	88.66	6.34	8,352
San Bartolomé de Tirajana	25,120	109,257	129,749	972,363	84.63	83.88	92.83	8.20	9,112
Salou	60,422	114,451	189,930	775,741	83.27	85.13	89.97	5.52	3,444
Adeje	16,507	94,543	77,840	765,391	81.29	80.91	88.73	7.59	8,114
Pájara	11,709	76,278	62,877	692,981	82.92	82.20	90.74	8.59	5,396
Lloret de Mar	25,974	108,812	87,492	603,723	80.03	77.43	85.88	5.13	2,994
Sant Llorenç des Cardassar	887	79,646	2,772	621,810	84.17	82.95	93.01	7.76	4,117
Torremolinos	23,251	83,380	80,795	461,607	86.00	89.70	93.51	5.09	3,117

* 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	10,926,097	100.00	38,024,241	100.00
Residents in Spain	4,745,234	43.43	11,312,979	29.75
Residents abroad	6,180,862	56.57	26,711,263	70.25
Total Residents abroad	6,180,862	100.00	26,711,263	100.00
Total Residents in E.U. (without Spain)	4,445,088	71.92	21,751,866	81.43
- Germany	1,023,665	16.56	6,231,392	23.33
- Austria	56,636	0.92	244,932	0.92
- Belgium	160,734	2.60	776,747	2.91
- Denmark	72,123	1.17	298,143	1.12
- Finland	30,217	0.49	110,466	0.41
- France	562,339	9.10	1,803,837	6.75
- Greece	9,212	0.15	23,950	0.09
- Ireland	113,073	1.83	484,598	1.81
- Italy	292,572	4.73	961,906	3.60
- Luxembourg	10,366	0.17	61,276	0.23
- Netherlands	242,977	3.93	1,154,569	4.32
- Poland	120,297	1.95	631,848	2.37
- Portugal	154,813	2.50	469,226	1.76
- United Kingdom	1,307,131	21.15	7,177,961	26.87
- Czech Republic	46,764	0.76	263,653	0.99
- Sweden	108,732	1.76	514,375	1.93
- Other EU countries*	133,439	2.16	542,988	2.03
Norway	69,224	1.12	293,084	1.10
Russia	124,678	2.02	803,892	3.01
Switzerland	122,037	1.97	514,087	1.92
Rest of Europe	125,717	2.03	483,678	1.81
Japan	58,383	0.94	109,677	0.41
United States of America	347,070	5.62	782,730	2.93
Rest of America	384,054	6.21	874,540	3.27
Africa	65,799	1.06	163,441	0.61
Other countries	438,811	7.10	934,268	3.50

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

Hotel Price Index (HPI). 2008 Base

September 2017

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	111.9	6.3
Andalucía	104.3	4.8
Aragón	69.1	0.9
Asturias, Principado de	92.6	1.1
Balears, Illes	132.1	6.8
Canarias	120.6	5.4
Cantabria	93.2	-0.1
Castilla y León	93.8	2.8
Castilla - La Mancha	85.7	2.7
Cataluña	112.1	7.3
Comunitat Valenciana	105.9	7.0
Extremadura	89.4	-1.7
Galicia	97.0	3.2
Madrid, Comunidad de	95.9	12.7
Murcia, Región de	86.7	3.6
Navarra, Comunidad Foral de	89.2	4.1
País Vasco	110.4	3.1
Rioja, La	90.2	-3.0
Ceuta	95.9	1.2
Melilla	99.4	-1.0

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	111.9	6.3
HOTELS: Gold stars		
Five	104.4	3.1
Fourth	109.0	6.0
Three	120.7	8.6
Two	104.7	5.3
One	119.7	5.8
HOSTALS: Silver stars		
Three and two	107.5	5.8
One	113.1	8.9

Indicators on the Profitability of the Hotel Sector

September 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	89.8	6.7	69.1	8.8
Andalucía	92.0	6.4	69.7	9.5
Aragón	54.2	0.0	27.1	9.5
Asturias, Principado de	59.1	0.9	31.9	0.9
Balears, Illes	101.0	7.4	90.8	5.0
Canarias	91.4	4.6	81.2	3.6
Cantabria	64.7	-1.4	38.8	-0.7
Castilla y León	58.2	3.2	30.2	9.4
Castilla - La Mancha	55.6	2.7	23.2	9.1
Cataluña	93.7	7.2	74.1	12.3
Comunitat Valenciana	81.6	8.4	64.2	10.1
Extremadura	55.3	-3.9	25.0	8.0
Galicia	57.5	1.2	29.8	9.0
Madrid, Comunidad de	99.3	16.8	80.2	21.0
Murcia, Región de	66.0	0.8	39.7	2.2
Navarra, Comunidad Foral de	65.1	5.5	42.4	15.3
País Vasco	93.4	3.5	72.2	4.7
Rioja, La	63.9	1.4	43.4	10.1
Ceuta	68.5	-4.7	42.0	-10.5
Melilla	66.2	-1.6	50.5	5.9

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	89.8	6.7	69.1	8.8
HOTELS: Gold stars				
Five	194.3	3.0	152.0	0.3
Four	97.1	6.2	83.4	6.7
Three	75.2	9.3	61.6	12.0
Two	60.4	5.4	37.2	7.1
One	59.9	6.1	31.2	11.5
GUESTHOUSES: Silver stars				
Three and two	56.4	7.9	27.3	15.8
One	51.2	14.1	24.5	29.9

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

Indicators on Profitability (ANNEX OF TABLES) - September 2017

23rd October 2017