

23 September 2013

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
August 2013. *Provisional data*

**Overnight stays in hotel establishments increase 3.5% in August,
as compared with the same month of 2012**

**Hotels earn 62.1 euros per available room and invoice an average of
85.6 euros per occupied room**

During the month of August, 42.0 million overnight stays were recorded in hotel establishments. This figure, which set a record in the historical series of the Hotel Occupancy Survey, was 3.5% higher than that registered during the same month of 2012.

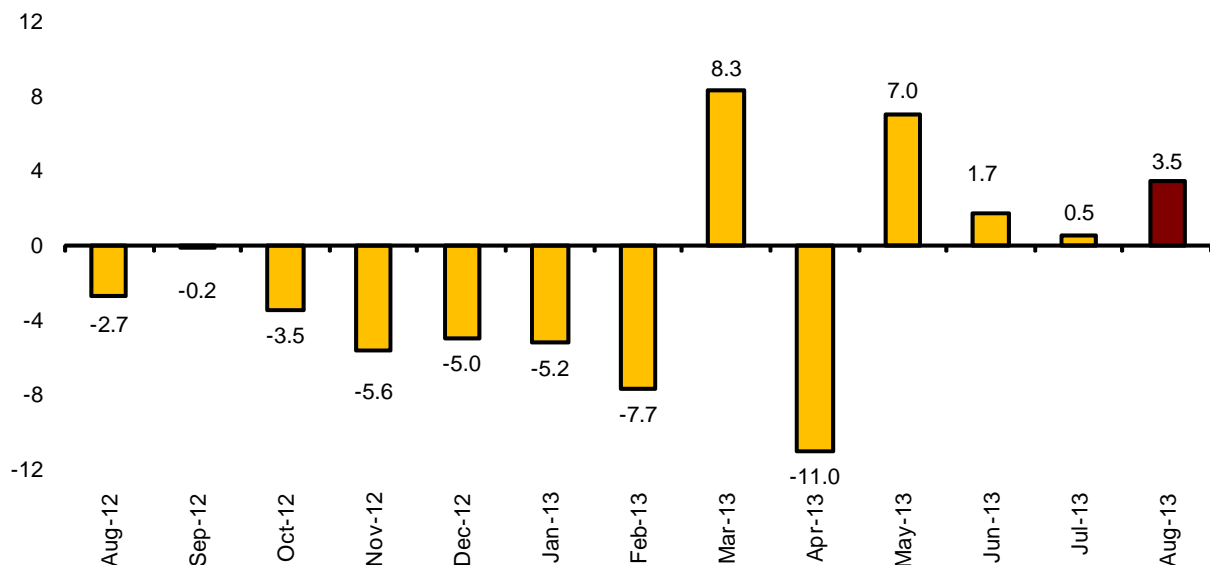
Overnight stays for residents in Spain increased 3.0%, whereas that for non-residents increased 3.8%.

The average stay decreased 1.3%, as compared with August 2012, standing at 3.9 nights per guest.

In the aggregated period of July and August, overnight stays increased 2.1% as compared with the same period of 2012. Those of residents increased 1.0% and that of non-residents 2.6%.

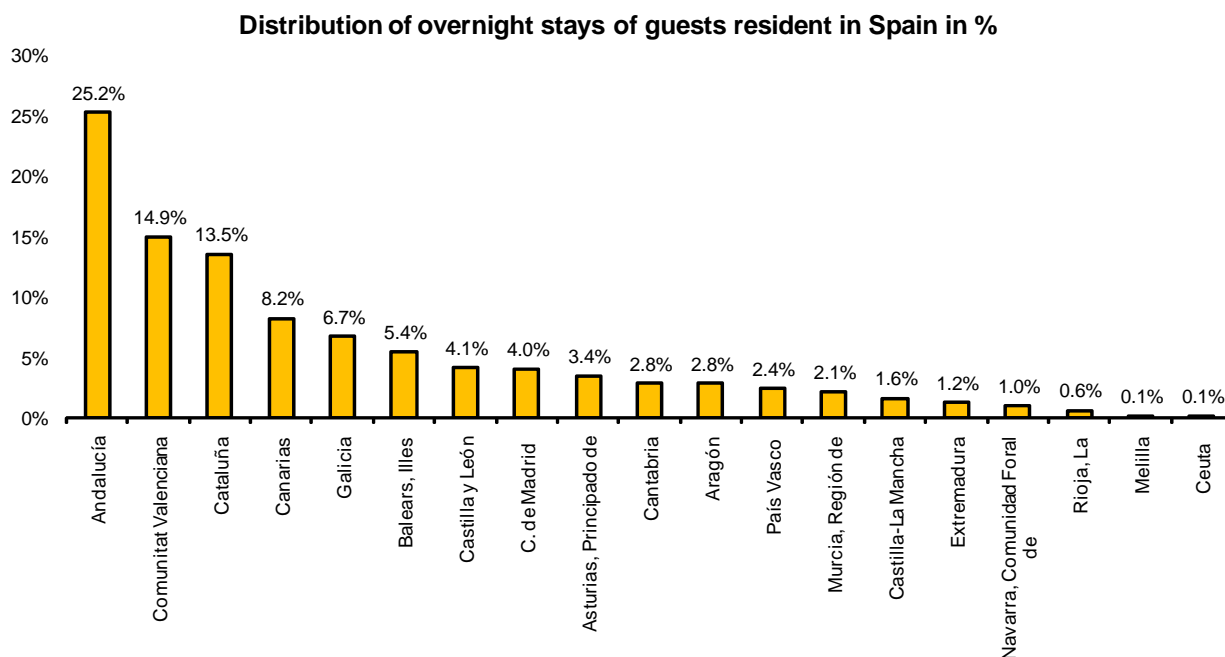
During the first eight months of 2013, overnight stays increased 0.6% as compared with the same period of the previous year.

Interannual rates of overnight stays in %

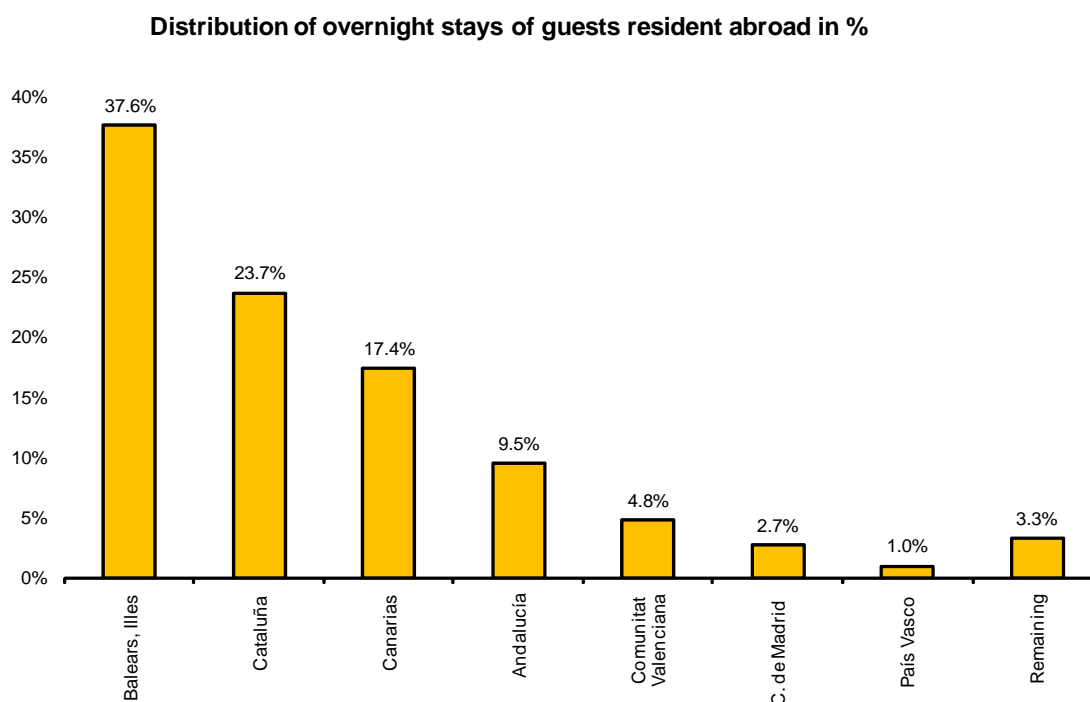


Main destinations

In August, Andalucía, Comunitat Valenciana, Cataluña and Canarias were the main destinations of guests resident in Spain, with interannual rates for overnight stays of 9.8%, 2.7%, –2.6% and –7.3%, respectively.



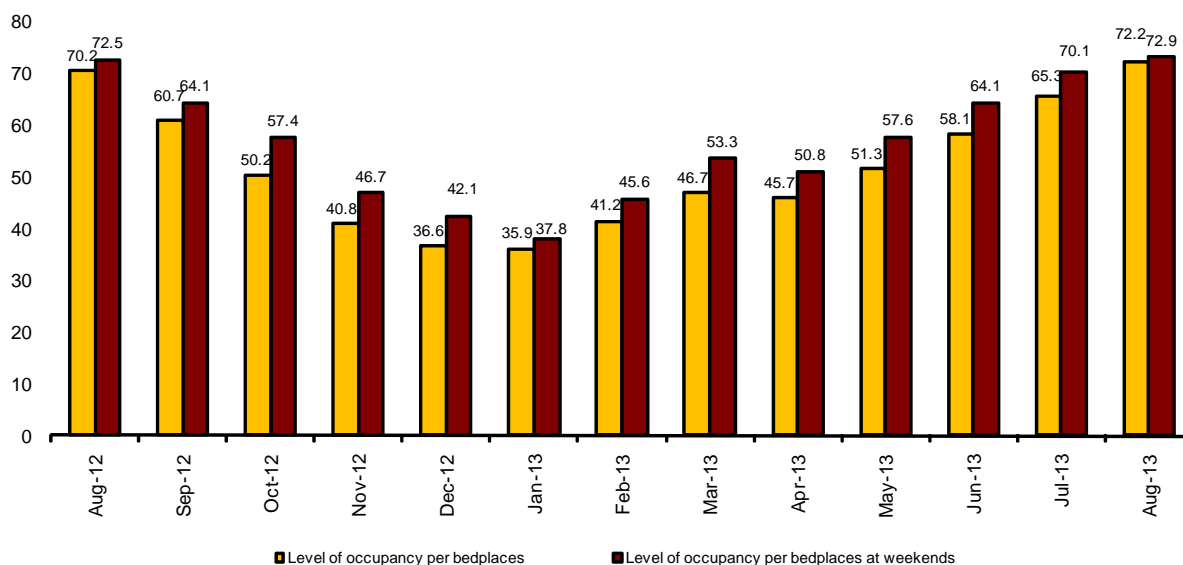
The main destination chosen by non-residents was Illes Balears. In this Autonomous Community, overnight stays by foreign nationals increased 0.1%, as compared with the same month of 2012. Followed by Cataluña, with a 6.3% increase, and Canarias, with a 5.5% increase.



Hotel Occupancy

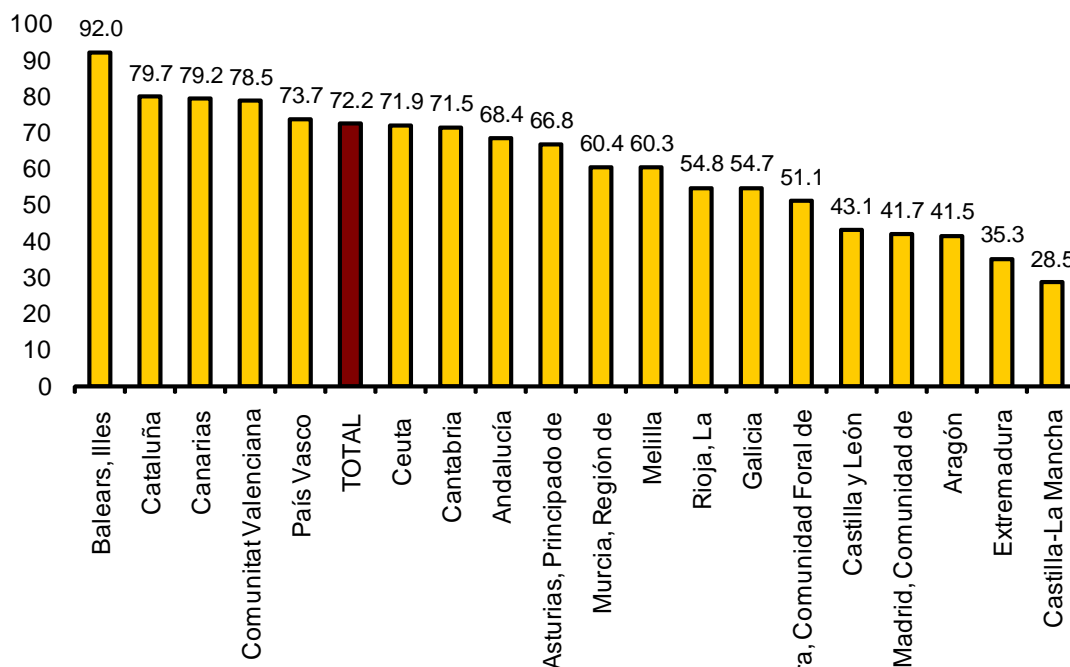
In terms of occupancy, 72.2% of the available bedplaces were occupied in August, with a 2.7% increase. The weekend occupancy rate by bedplaces increased 0.6% and stood at 72.9%.

Level of occupancy per bedplaces and per bedplaces at weekends



During the month of August, Illes Balears was the Autonomous Community with the highest occupancy rate by bedplaces (92.0%), followed by Cataluña (79.7%) and Canarias (79.2%).

Level of occupancy per bedplaces by Autonomus Communities



By tourist areas, the islands Ibiza and Formentera registered the highest occupancy rate by bedplaces in August (93.8%), while the island of Mallorca registered the highest weekend occupancy rate by bedplaces (91.7%). This tourist area also registered the highest number of overnight stays, with a little over 7.8 millions.

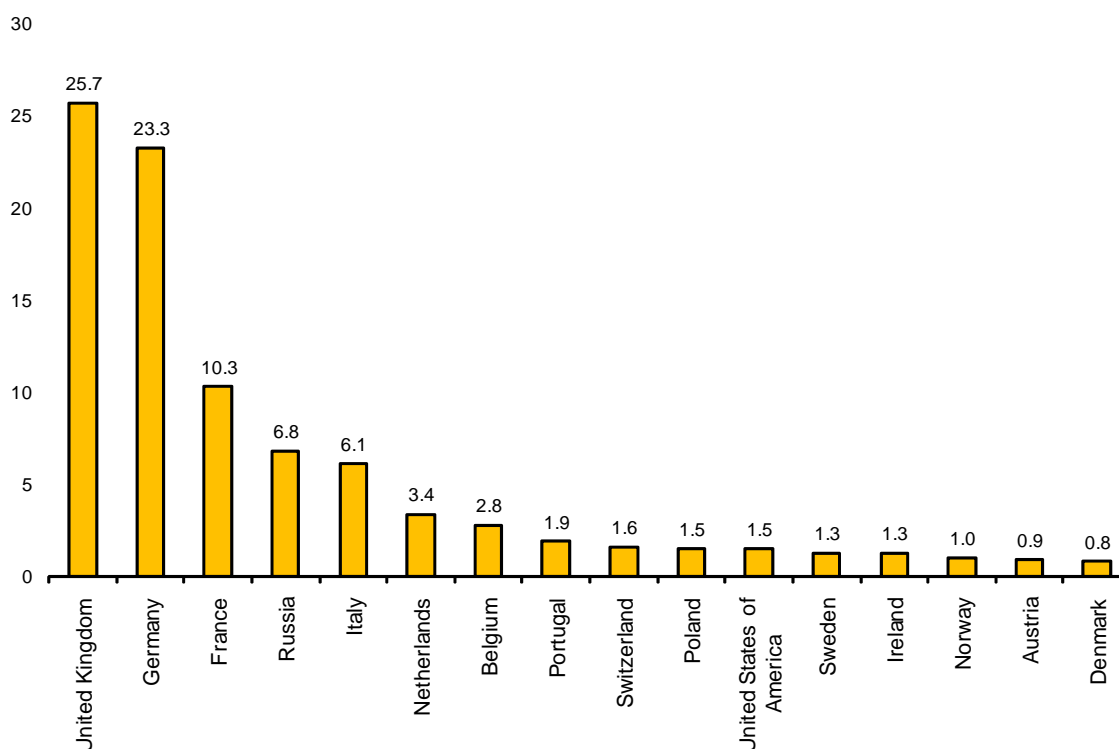
The tourist sites with the highest number of overnight stays were Barcelona, Calvià and Benidorm. Sant Atoni de Portmany reached the highest occupancy rate by bedplaces (99.6%) and Santa Margalida the highest weekend occupancy (98.6%).

Overnight stays of guests resident abroad

Guests from the United Kingdom and Germany registered 25.7% and 23.3%, respectively, of the total of overnight stays by non-residents in August. The British market experienced a 3.0% annual increase, while the German market increased 2.9%.

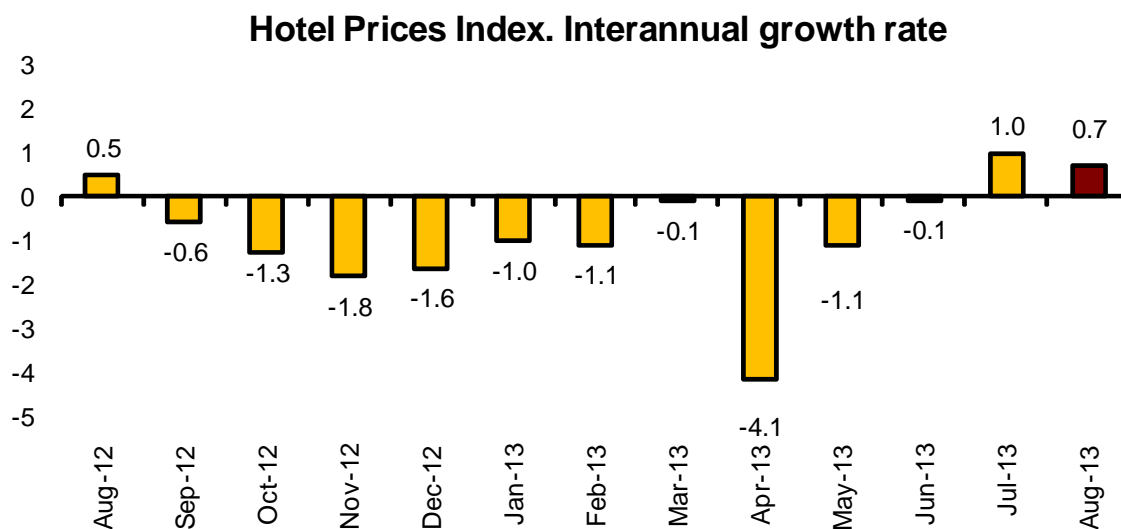
Overnight stays of guests from France, Russia and Italy (the following countries of origin) registered annual rates of 10.8%, 14.6% and –11.8%, respectively.

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



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 0.7% in August, that is, 0.3 points lower than that of the previous month, and 0.2 points more than that registered the previous year.



Illes Balears, Cataluña, Andalucía and Canarias were the Autonomous Communities that carried the greatest weight of total load of the HPI in the month of August (together they represent 76.1% of the total weight). Hotel prices increased 5.0% in the annual rate in Illes Balears and 2.4% in Canarias. In turn, they decreased 2.2% in Andalucía and 0.1% in Cataluña.

By hotel category, the decreases in hotel prices were registered in three and two-silver-star hotels (-2.2%) and in the five-golden-star hotels (-0.3%).

The remaining categories registered positive annual rates: one-silver-star establishments (2.7%), two-golden-star establishments (2.1%), four-golden-star establishments (1.1%) and three-golden-stars establishments (0.4%).

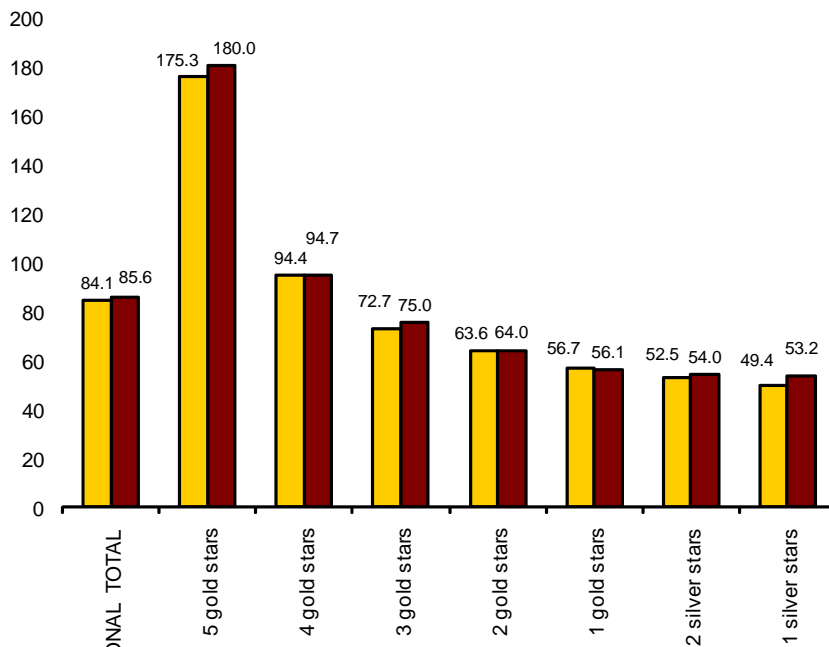
Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in August was 85.6 euros, a 1.8% increase, as compared with the same month in 2012.

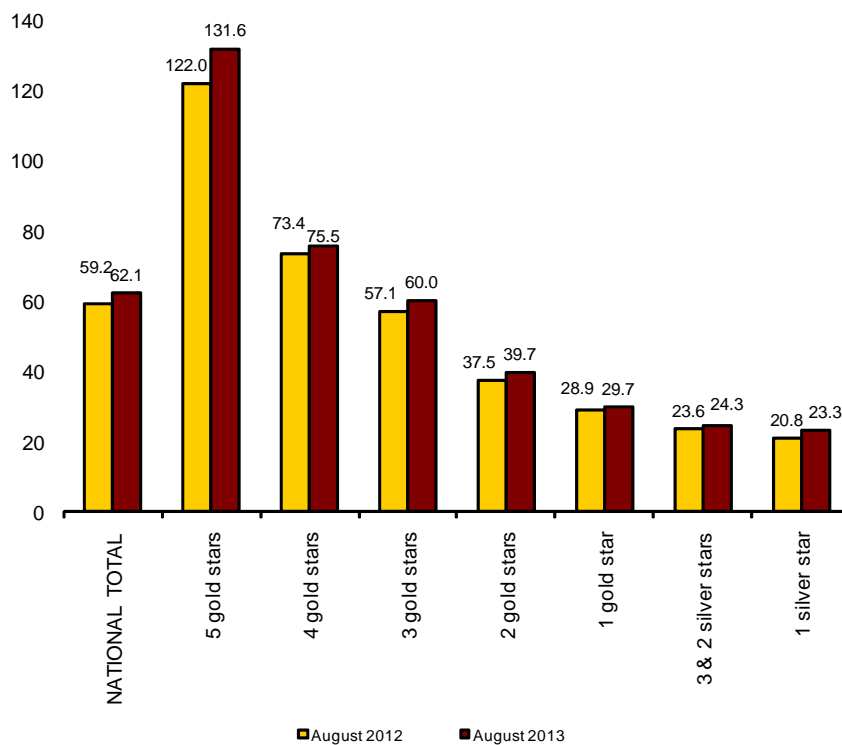
In turn, the average daily income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 62.1 euros, with a 4.8% increase as compared with August 2012.

By category, the average invoicing was 180.0 euros for five-star hotels, 94.7 euros for four-star hotels and 75.0 euros for three-star hotels. Income per available room for the same categories was 131.6, 75.5 and 60.0 euros, respectively.

Average daily rate (ADR)



Revenue per available room (RevPAR)



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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 2013

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	10,733,467	5,443,487	5,289,980	41,996,463	15,949,897	26,046,566	3.91
HOTELS: Golden stars							
Five	461,443	165,505	295,938	1,909,825	535,498	1,374,327	4.14
Four	4,480,507	2,245,259	2,235,247	18,832,123	7,225,735	11,606,387	4.20
Three	3,434,550	1,617,718	1,816,832	14,850,423	4,794,645	10,055,779	4.32
Two	923,612	555,956	367,656	2,759,336	1,415,028	1,344,308	2.99
One	341,624	215,462	126,162	915,000	523,956	391,043	2.68
INNS: Silver stars							
Two and three	576,385	358,443	217,942	1,473,772	775,410	698,362	2.56
One	515,347	285,144	230,203	1,255,983	679,624	576,359	2.44
Interannual rate	4.82	4.41	5.25	3.49	2.98	3.80	-1.27
Cumulative interannual rate	-0.21	-2.99	2.80	0.60	-3.67	3.12	0.81

2. Open establishments, capacity, occupancy and employed personnel by category of establishment

Category	Estimated open establishments	Estimated bedplaces	Occupancy rate			Employed personnel
			Of bedplaces	Of bedplaces at weekend	Of bedrooms	
TOTAL	16,730	1,755,308	72.16	72.91	72.52	238,172
HOTELS: Golden stars						
Five	268	83,452	71.09	71.94	73.08	25,504
Four	2,296	717,819	78.63	78.71	79.85	109,753
Three	3,027	551,721	80.04	80.28	80.02	68,220
Two	2,155	142,080	60.75	63.80	61.69	13,353
One	1,374	57,521	50.11	52.63	51.81	5,148
INNS: Silver stars						
Two and three	3,347	106,626	43.85	46.53	44.78	8,950
One	4,264	96,088	40.98	43.07	43.78	7,244
Interannual rate	-1.48	0.49	2.73	0.62	3.13	-1.88

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 bedplac	Of bedplaces at weekend	Of bedrooms		
Tourist area with a greater occupancy rate per month									
Islas de Ibiza-Formentera	58,714	266,197	252,611	1,686,454	93.84	89.93	92.35	5.97	9,118
Isla de Mallorca	84,279	1,032,038	391,753	7,486,016	91.78	91.71	93.22	7.06	36,284
Palma - Calvià	46,060	447,384	187,733	2,757,970	91.52	91.44	93.13	5.97	13,243
Isla de Menorca	39,728	76,969	221,978	630,273	89.49	86.68	90.10	7.30	4,110
Costa De Gipuzkoa	38,690	37,375	95,281	85,945	88.26	88.09	89.29	2.38	1,213
Costa Daurada	166,366	211,212	608,511	1,323,660	88.12	87.63	89.18	5.12	6,761
Costa Blanca	302,583	158,106	1,261,068	822,624	87.39	87.08	85.43	4.52	9,565
Isla de Lanzarote	37,319	75,559	244,018	703,082	85.56	85.11	87.91	8.39	5,241

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

Costa del Sol	293,271	253,539	1,133,536	1,294,449	83.67	83.32	86.17	4.44	13,431
Costa Brava	200,717	331,450	601,753	1,626,004	81.88	80.90	82.27	4.19	9,721
Isla de Tenerife	100,851	196,339	483,043	1,706,846	78.28	78.77	77.82	7.37	15,375
Barcelona	99,287	609,761	200,030	1,800,503	83.26	84.13	87.97	2.82	12,029
Sur de Tenerife	58,078	168,692	279,390	1,500,756	82.52	83.68	83.77	7.85	12,189
Isla de Gran Canaria	74,460	117,500	370,555	1,062,534	75.73	78.50	79.16	7.47	10,178
Sur de Gran Canaria	59,353	109,061	321,665	1,026,676	80.10	82.61	83.58	8.01	9,278
Isla de Fuerteventura	27,488	102,480	154,817	1,012,407	84.57	82.22	85.64	8.98	6,750

Tourist site with a greater occupancy rate per month

Sant Antoni de Portmany	6,883	60,489	32,362	380,716	99.62	96.17	93.86	6.13	1,273
Muro	6,548	72,214	44,533	561,453	98.57	90.26	95.35	7.69	2,675
Santa Margalida	2,949	56,457	11,801	482,745	97.45	98.57	97.28	8.32	2,032
Malgrat de Mar	5,117	26,290	17,336	204,075	97.45	93.92	93.97	7.05	671
Sant Josep de Sa Talaia	8,568	56,961	32,922	419,511	95.97	90.53	92.45	6.90	3,156
Alcúdia	4,375	73,793	25,762	589,651	95.45	96.56	96.13	7.87	3,119
Son Servera	756	34,829	3,645	300,931	95.33	97.12	89.77	8.56	1,263
Salou	55,908	121,499	236,055	869,843	94.54	92.91	93.22	6.23	3,418
Teguise	7,818	17,819	58,915	171,316	94.52	81.98	89.09	8.98	1,149
Benidorm	151,882	92,524	717,555	610,469	94.24	91.42	89.90	5.43	5,657

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

Barcelona	91,721	581,182	186,028	1,721,796	84.08	84.10	88.15	2.84	11,634
Calvià	12,153	202,061	71,703	1,524,250	90.05	91.59	93.43	7.45	6,846
Palma	33,211	231,731	103,521	1,153,012	92.61	90.88	92.97	4.74	5,875
Madrid	249,551	295,429	445,735	647,659	44.00	47.04	48.53	2.01	11,167
San Bartolomé de Tirajana	46,953	79,781	257,269	763,875	80.40	83.23	85.03	8.06	7,444
Lloret de Mar	27,470	151,959	90,885	925,347	87.99	86.85	88.17	5.66	3,118
Adeje	25,643	90,064	122,659	812,422	82.80	84.59	85.57	8.08	6,754
Pájara	14,824	70,962	85,821	699,842	88.10	86.69	86.97	9.16	4,453
Sant Llorenç des Cardassar	2,495	76,839	12,939	685,361	93.84	91.67	93.56	8.80	2,919
Torremolinos	74,861	50,155	327,822	332,849	90.26	92.71	91.47	5.28	2,942

* Not taken into account those included in the preceding table because they are in the bigger occupancy rate tables too.

8. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	10,733,467	100.00	41,996,463	100.00
Residents in Spain	5,443,487	50.72	15,949,897	37.98
Residents abroad	5,289,980	49.28	26,046,566	62.02
Total Residents abroad	5,289,980	100.00	26,046,566	100.00
Total Residents in E.U. (without Spain)	4,023,958	76.07	21,297,444	81.77
- Germany	880,715	16.65	6,080,212	23.34
- Austria	44,652	0.84	226,254	0.87
- Belgium	141,447	2.67	728,836	2.80
- Denmark	41,338	0.78	204,233	0.78
- Finland	17,563	0.33	71,666	0.28
- France	797,631	15.08	2,669,821	10.25
- Greece	11,828	0.22	28,990	0.11
- Ireland	61,708	1.17	329,698	1.27
- Italy	419,588	7.93	1,586,116	6.09
- Luxembourg	12,571	0.24	74,052	0.28
- Netherlands	172,378	3.26	896,929	3.44
- Poland	65,295	1.23	402,241	1.54
- Portugal	167,509	3.17	493,368	1.89
- United Kingdom	1,015,089	19.19	6,690,347	25.69
- Czech Republic	23,924	0.45	143,866	0.55
- Sweden	67,029	1.27	341,977	1.31
- Other EU countries*	83,694	1.58	328,837	1.26
Norway	47,500	0.90	270,653	1.04
Russia	262,563	4.96	1,779,889	6.83
Switzerland	77,167	1.46	409,791	1.57
Rest of Europe	105,980	2.00	420,918	1.62
Japan	60,595	1.15	111,853	0.43
United States of America	164,846	3.12	393,787	1.51
Rest of America	208,354	3.94	484,399	1.86
Africa	74,718	1.41	188,547	0.72
Other countries	264,297	5.00	689,287	2.65

*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 2013

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Interannual variation rate
TOTAL	97.3	0.7
Andalucía	89.4	-2.2
Aragón	61.5	-0.8
Asturias, Principado de	87.3	-1.2
Balears, Illes	112.3	5.0
Canarias	100.2	2.4
Cantabria	86.8	-1.9
Castilla y León	86.1	-3.0
Castilla - La Mancha	83.4	-5.7
Cataluña	100.6	-0.1
Comunitat Valenciana	91.2	-1.3
Extremadura	86.8	-4.3
Galicia	89.1	-1.8
Madrid, Comunidad de	78.5	-6.3
Murcia, Región de	81.3	-1.6
Navarra, Comunidad Foral de	86.0	-5.7
País Vasco	98.4	1.5
Rioja, La	85.6	-4.1
Ceuta	105.1	-7.2
Melilla	92.4	-1.4

National General Index and breakdown by categories

	Index	Interannual variation rate
TOTAL	97.3	0.7
HOTELS: Gold stars		
Five	90.6	-0.3
Fourth	95.1	1.1
Three	101.2	0.4
Two	100.2	2.1
One	101.9	0.9
HOSTALS: Silver stars		
Three and two	95.9	-2.2
One	100.9	2.7

Indicators on the Profitability of the Hotel Sector

August 2013

Provisional data

National ADR and RevPAR^(*) and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Variation Rate variation	RevPar (in euros)	Variation Rate variation
TOTAL	85.6	1.8	62.1	4.8
Andalucía	97.6	-2.2	68.7	3.2
Aragón	55.9	-0.4	22.7	1.8
Asturias, Principado de	70.4	-2.6	47.3	7.8
Balears, Illes	96.5	7.1	89.5	7.0
Canarias	78.9	1.5	63.3	5.7
Cantabria	79.4	-3.5	55.5	6.4
Castilla y León	54.0	-1.4	23.5	4.6
Castilla - La Mancha	53.8	-3.8	15.8	-1.9
Cataluña	88.4	2.2	71.8	4.5
Comunitat Valenciana	81.6	-1.3	62.5	3.1
Extremadura	52.7	-4.7	18.4	-4.5
Galicia	60.8	-1.4	33.7	6.8
Madrid, Comunidad de	65.2	-5.7	29.5	-9.8
Murcia, Región de	79.9	5.2	43.5	10.3
Navarra, Comunidad Foral de	61.6	-3.8	32.2	-0.1
País Vasco	86.4	2.4	65.6	3.1
Rioja, La	57.9	-5.7	31.4	-5.9
Ceuta	76.6	1.5	53.9	10.7
Melilla	65.8	2.5	46.2	19.0

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

	ADR (in euros)	Variation Rate interannual	RevPar (in euros)	Variation Rate interannual
TOTAL	85.6	1.8	62.1	4.8
HOTELS: Gold stars				
Five	180.0	2.7	131.6	7.9
Four	94.7	0.3	75.5	2.9
Three	75.0	3.2	60.0	5.0
Two	64.0	0.6	39.7	6.0
One	56.1	-1.0	29.7	3.0
GUESTHOUSES: Silver stars				
Three and two	54.0	3.0	24.3	3.2
One	53.2	7.8	23.3	12.2

(*) ADR: Average Daily Rate
RevPAR: Revenue per Available Room