

23 July 2014

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
June 2014. *Provisional data*

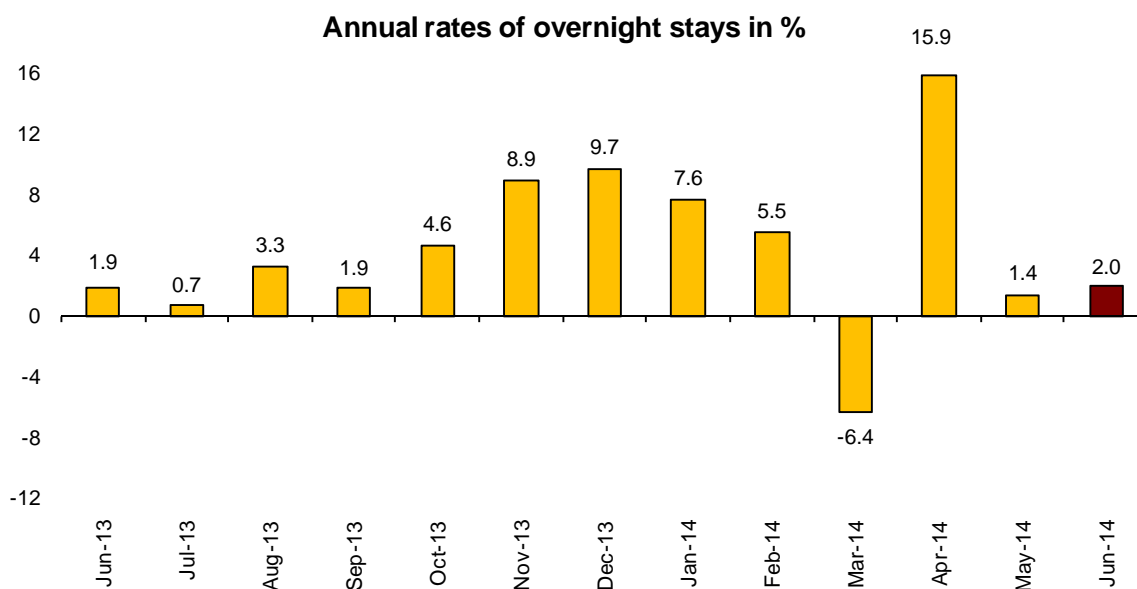
Overnight stays in hotel establishments registered an increase of 2.0% in June, as compared to the same month of 2013

Hotels earn 44.7 euros per available room and invoice an average of 70.7 euros per occupied room

In June, a total of 31.4 million overnight stays were registered in hotel establishments, indicating an increase of 2.0% as compared with the same month of 2013. Overnight stays for residents in Spain increased 4.0% and those of non-residents did so by 1.2%.

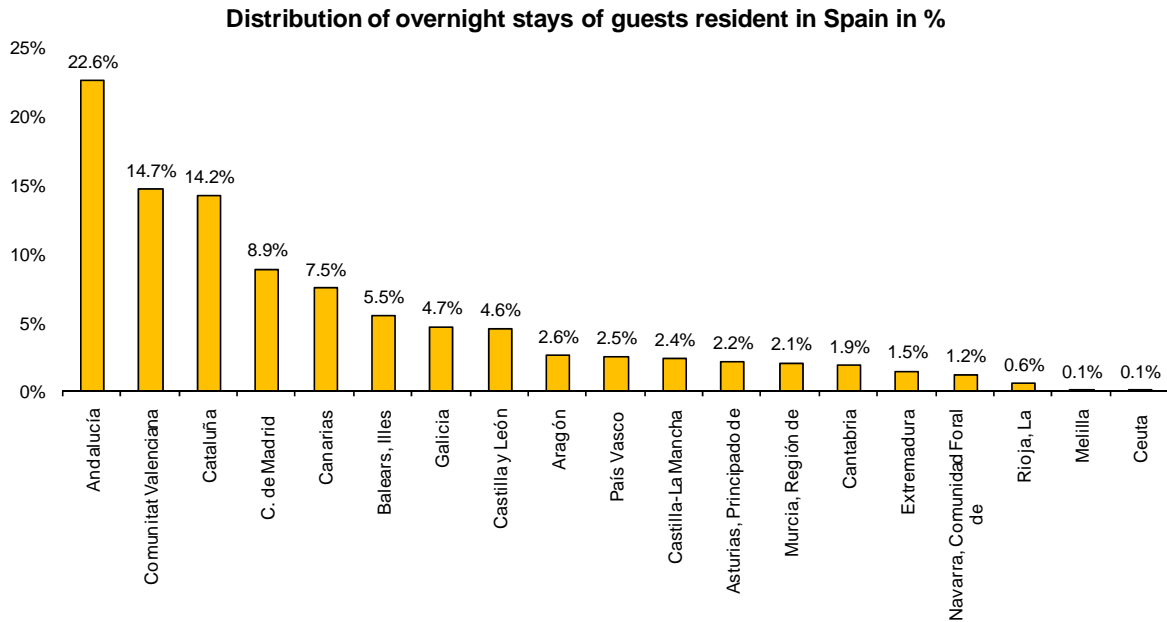
The average stay decreased 1.2%, as compared with June 2013, standing at 3.5 nights per guest.

In the first six months of 2014, overnight stays increased 3.7% as compared with the same period of the previous year.

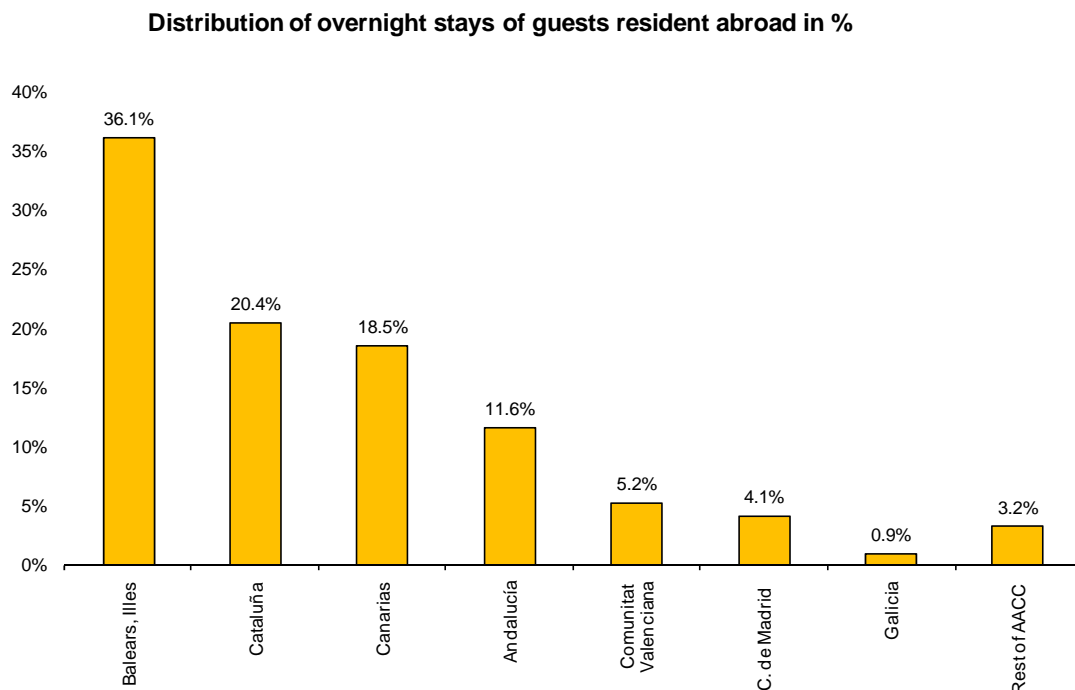


Main destinations

In June, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 7.6%, 1.0%, 7.8% and 14.5%, respectively.



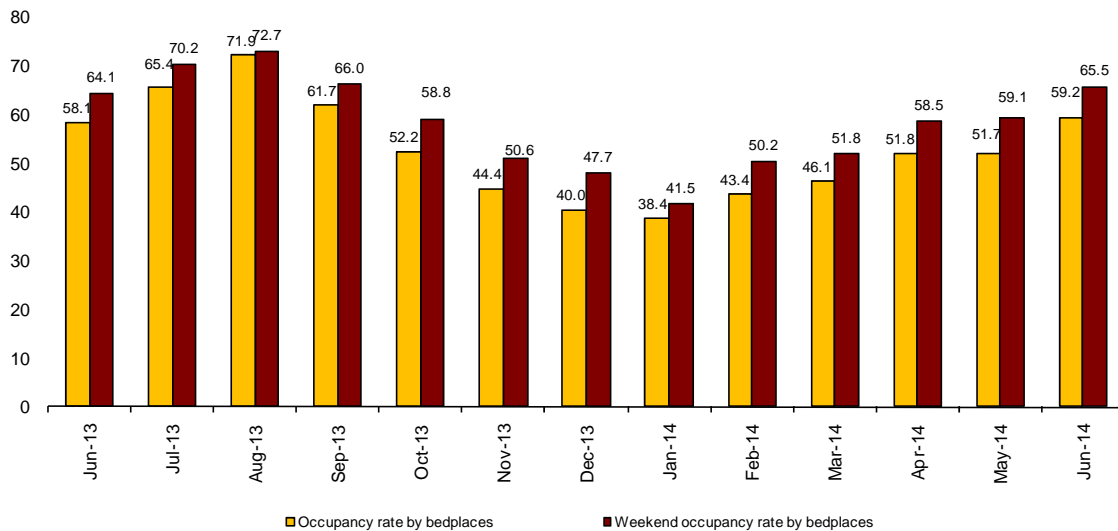
The main destination chosen by non-residents was Illes Balears, with 36.1% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 2.4%, as compared with June 2013. Illes Balears was followed by Cataluña (20.4% of the total) and Canarias (18.5%). The overnight stays of non-residents in these Autonomous Communities decreased by 1.1% and increased by 7.8%, respectively.



Hotel Occupancy

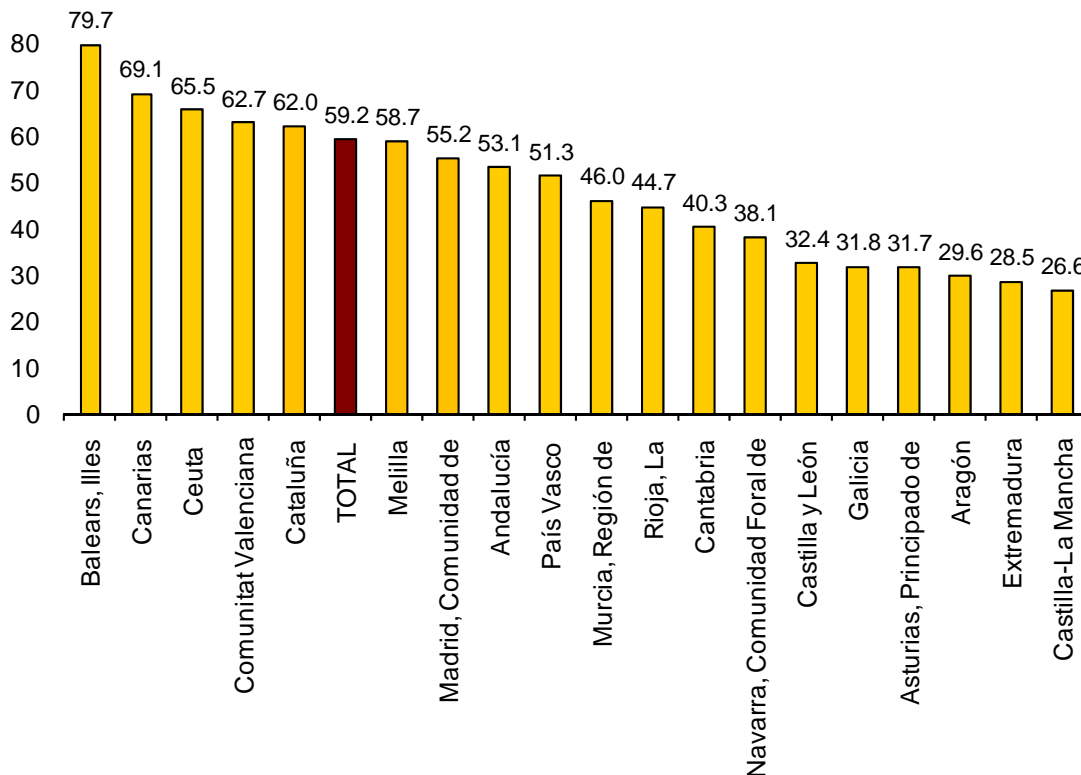
In terms of occupancy, 59.2% of the available bedplaces were occupied in June, with an annual increase of 1.9%. The weekend occupancy rate by bedplaces increased 2.2%, standing at 65.5%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears registered the greatest occupancy rate by bedplaces in June (79.7%), followed by Canarias (69.1%) and Comunitat Valenciana (62.7%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, Palma-Calvià registered in June both the highest occupancy rate by bedplaces (82.2%) and the highest weekend occupancy rate (85.6%). Mallorca recorded the highest number of overnight stays, with more than 6.2 million.

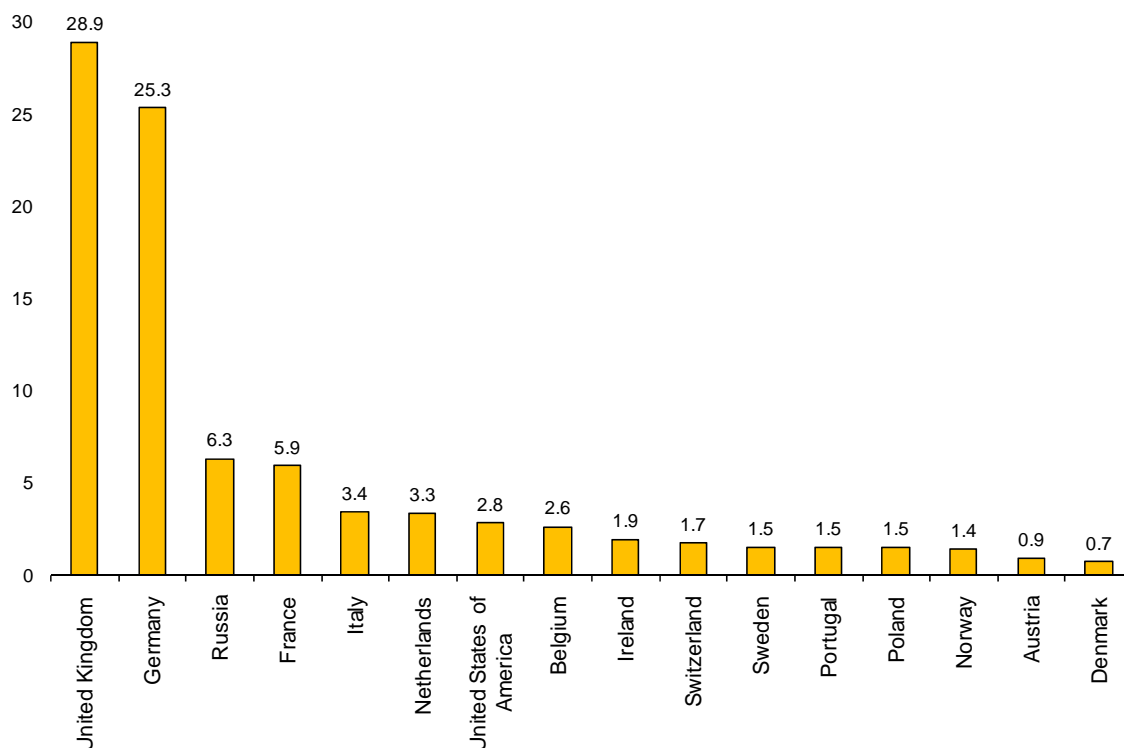
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Muro reached the highest occupancy rate by bedplaces (87.4%) and Palma the highest weekend occupancy rate (89.3%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 28.9% and 25.3%, respectively, of the total of overnight stays in hotel establishments by non-residents in June. The British market experienced an increase of 0.9% and the German market did so by 6.0%.

Overnight stays of guests from Russia, France and Italy (the following countries of origin) registered annual rates of -13.7%, 7.0% and 1.4%, respectively.

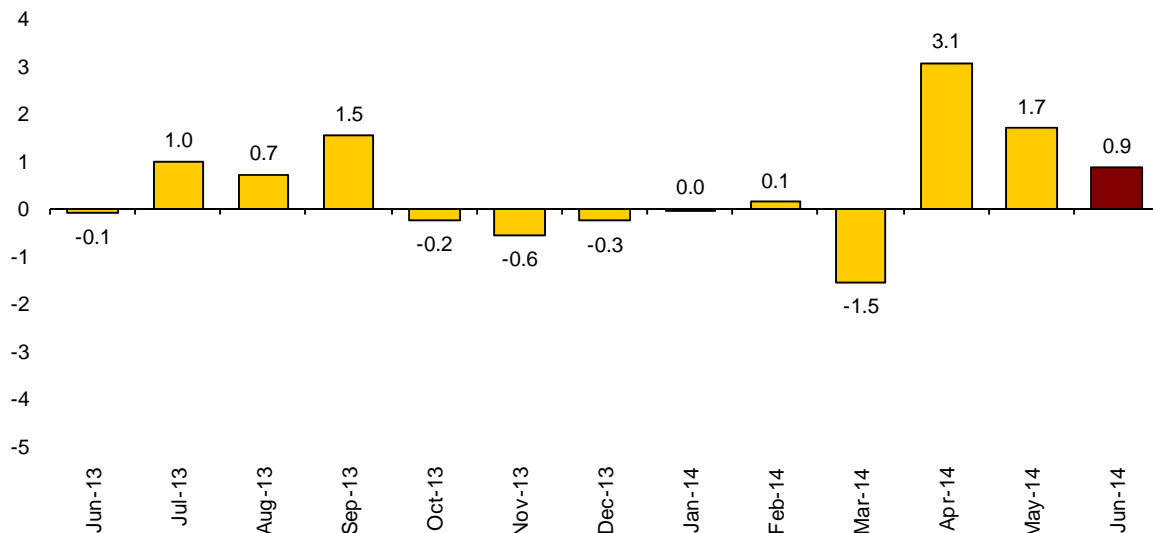
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 0.9% in June, that is, 0.8 points lower than that of the previous month and 1.0 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 June (together they represented 74.6% of the total weight). Hotel prices increased 3.1% in the annual rate in Canarias, 1.9% in Andalucía and 1.2% in Illes Balears. In turn, hotel prices decreased 0.4% in Cataluña.

By hotel category, the increases in hotel prices were registered in three and two-silver-star hotels (2.6%), five-golden-star hotels (1.6%), four-golden-star hotels (1.2%) and three-golden-star hotels (0.4%).

In turn, the prices registered a decrease in one-silver-star establishments (4.9%) and one-golden-star hotels (0.9%).

Prices in two golden-star establishments remained unchanged, as compared with the same month of 2013.

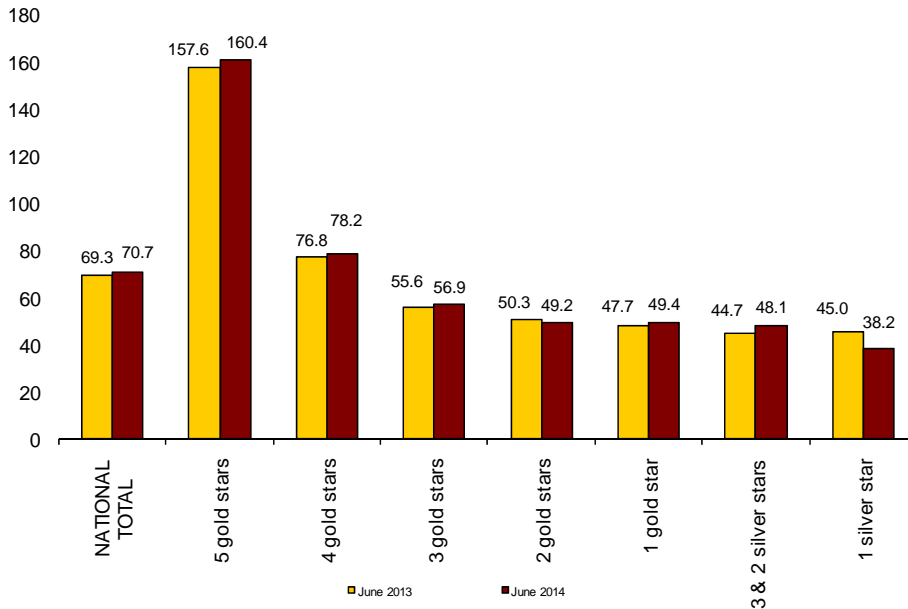
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in June was 70.7 euros, which represented an increase of 2.1% as compared with the same month of 2013.

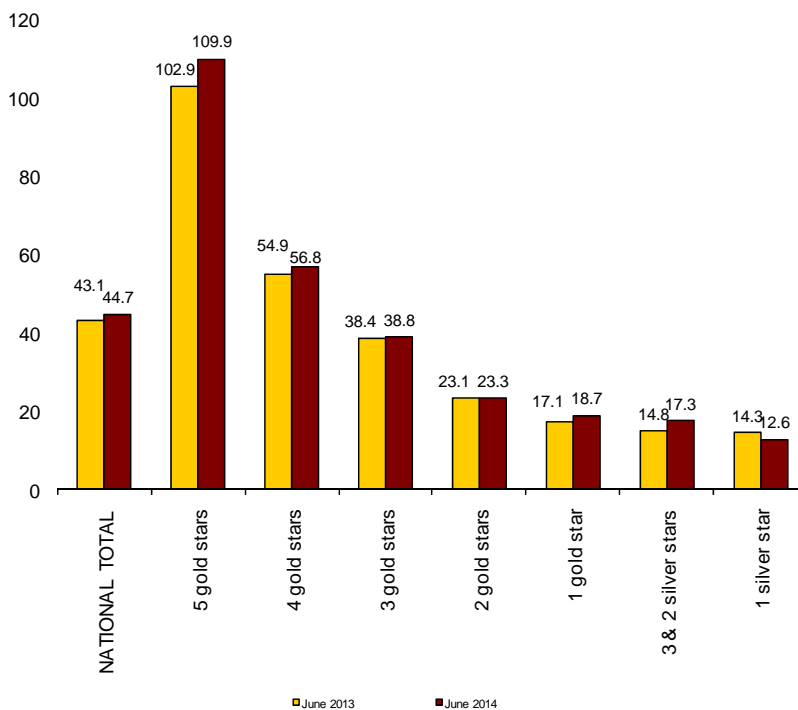
In turn, the daily average revenue per available room (RevPAR), that is conditioned by the occupancy registered in hotel establishments, reached 44.7 euros, with an increase of 3.7%.

By category, the average invoicing was 160.4 euros for five-star hotels, 78.2 euros for four-star hotels and 56.9 euros for three-star hotels. Income per available room for the same categories was 109.9, 56.8 and 38.8 euros, respectively.

Average daily rate (ADR) by hotel category in euros



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



For further information see [INEbase-www.ine.es/en/](http://www.ine.es/en/)

All press releases at: www.ine.es/en/prensa/prensa_en.htm

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)

June 2014

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	9,014,213	4,247,765	4,766,449	31,433,855	9,733,026	21,700,829	3.49
HOTELS: Golden stars							
Five	441,999	142,350	299,650	1,480,364	310,578	1,169,786	3.35
Four	4,054,939	1,894,269	2,160,669	14,878,510	4,388,108	10,490,402	3.67
Three	2,771,369	1,237,184	1,534,186	10,893,566	3,049,361	7,844,205	3.93
Two	662,760	377,631	285,130	1,743,711	783,932	959,779	2.63
One	238,117	142,297	95,820	536,042	267,648	268,394	2.25
INNS: Silver stars							
Two and three	454,132	273,465	180,667	1,032,412	512,983	519,429	2.27
One	390,896	180,570	210,327	869,250	420,416	448,834	2.22
Annual rate	3.31	3.37	3.26	2.03	4.02	1.16	-1.24
Cumulative annual rate	4.58	4.46	4.70	3.71	3.09	4.05	-0.83

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

Category	Estimated open establishments	Estimated bed-places	Occupancy rate			Employed personnel
			Of bed-places	Of bed-places at weekend	Of bedrooms	
TOTAL	16,483	1,731,332	59.17	65.53	63.29	222,115
HOTELS: Golden stars						
Five	272	83,358	58.43	66.51	68.68	25,653
Four	2,341	732,570	66.15	72.58	72.72	104,736
Three	2,958	532,570	66.24	71.11	68.54	60,867
Two	2,108	133,259	43.25	52.82	46.88	11,320
One	1,303	53,713	33.08	40.27	37.63	4,412
INNS: Silver stars						
Two and three	3,256	102,035	33.41	41.37	36.15	8,406
One	4,246	93,827	30.73	36.74	34.37	6,719
Annual rate	1.59	0.77	1.91	2.22	1.75	1.48

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

Palma - Calvià	35,462	413,669	164,236	2,264,556	82.15	85.55	84.59	5.41	13,291
Isla de Mallorca	64,306	935,048	273,060	6,019,177	81.07	82.55	83.92	6.30	34,064
Isla de Lanzarote	24,573	83,261	123,817	698,795	78.88	74.08	82.64	7.63	5,484
Islas de Ibiza-Formentera	47,510	219,475	161,828	1,259,156	77.25	79.39	77.25	5.32	9,124
Sur de Tenerife	41,951	158,497	167,739	1,297,377	74.82	77.57	80.03	7.31	11,531
Costa Blanca	194,049	152,203	727,823	838,263	74.38	82.54	76.77	4.52	9,062
Isla de Menorca	26,279	74,994	103,006	556,329	73.13	72.31	76.81	6.51	3,692
Barcelona	123,846	539,425	237,667	1,446,331	71.56	75.87	79.55	2.54	12,629

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

Costa del Sol	198,589	261,816	562,748	1,294,887	68.65	76.08	75.60	4.03	12,301
Isla de Tenerife	73,944	180,117	296,286	1,468,023	69.68	72.74	74.08	6.94	14,481
Costa Brava	141,364	234,446	291,017	1,053,701	57.11	68.41	59.86	3.58	8,109
Costa Daurada	162,059	143,002	402,788	925,642	67.87	70.60	67.03	4.35	5,850
Isla de Gran Canaria	59,715	114,583	215,034	953,730	64.51	68.00	71.64	6.71	10,087
Sur de Gran Canaria	41,392	107,685	171,577	928,151	68.53	71.96	75.60	7.38	9,130
Isla de Fuerteventura	14,970	96,737	76,925	851,634	70.44	72.30	77.86	8.31	6,752
Costa de la Luz de Cádiz	135,312	61,535	331,478	328,867	54.92	66.30	62.24	3.35	5,372

Tourist site with a greater occupancy rate per month

Muro	3,764	58,504	12,468	406,409	87.42	83.40	88.86	6.73	2,268
Son Servera	414	26,999	1,658	262,663	86.14	86.45	88.31	9.64	1,075
Alcúdia	1,937	60,057	8,811	513,637	85.54	86.28	89.63	8.43	2,718
Santa Margalida	1,151	43,932	3,690	364,926	84.73	86.16	87.16	8.18	1,774
Benidorm	92,376	90,366	484,916	590,266	84.43	88.89	85.05	5.88	5,409
Palma	22,166	207,141	69,400	989,366	83.46	89.32	86.66	4.62	5,949
Eivissa	15,320	48,879	43,162	215,901	83.19	85.74	88.36	4.04	1,951
Yaiza	12,849	41,108	68,983	342,312	82.77	74.39	84.32	7.62	2,780
Calella	15,639	44,537	40,815	249,151	81.49	79.12	70.56	4.82	995
Torremolinos	44,754	60,622	166,309	374,998	81.47	88.04	87.02	5.14	2,721

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

Barcelona	114,347	514,042	218,881	1,383,959	72.61	76.94	80.35	2.55	12,157
Madrid	377,418	366,544	633,061	815,635	59.08	65.67	70.91	1.95	11,227
Calvià	11,263	190,712	89,172	1,194,929	80.60	82.08	81.69	6.36	6,876
Salou	62,742	95,498	172,902	668,001	78.02	78.87	77.12	5.31	3,094
San Bartolomé de Tirajana	34,736	79,454	139,681	685,461	68.92	73.71	76.89	7.23	7,150
Adeje	20,594	81,148	87,841	690,685	76.39	78.28	81.54	7.65	6,345
Lloret de Mar	35,498	103,730	85,127	585,939	69.60	79.33	70.48	4.82	2,487
Pájara	6,825	60,929	44,427	543,022	72.20	75.41	79.06	8.67	4,386
Sant Llorenç des Cardassar	1,432	68,315	3,958	541,040	80.23	80.99	86.05	7.81	2,857
Arona	8,992	53,069	40,767	423,908	79.94	81.05	83.31	7.49	3,013

* 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	9,014,213	100.00	31,433,855	100.00
Residents in Spain	4,247,765	47.12	9,733,026	30.96
Residents abroad	4,766,449	52.88	21,700,829	69.04
Total Residents abroad	4,766,449	100.00	21,700,829	100.00
Total Residents in E.U. (without Spain)	3,432,041	72.00	17,367,994	80.03
- Germany	873,324	18.32	5,485,747	25.28
- Austria	45,813	0.96	189,913	0.88
- Belgium	109,483	2.30	557,854	2.57
- Denmark	37,469	0.79	160,893	0.74
- Finland	27,241	0.57	102,929	0.47
- France	424,436	8.90	1,288,589	5.94
- Greece	10,013	0.21	25,861	0.12
- Ireland	82,159	1.72	405,805	1.87
- Italy	223,308	4.68	735,416	3.39
- Luxembourg	9,262	0.19	47,845	0.22
- Netherlands	149,295	3.13	714,062	3.29
- Poland	66,405	1.39	317,831	1.46
- Portugal	111,115	2.33	325,453	1.50
- United Kingdom	1,087,501	22.82	6,263,840	28.86
- Czech Republic	23,751	0.50	122,368	0.56
- Sweden	71,939	1.51	334,503	1.54
- Other EU countries*	79,526	1.67	289,086	1.33
Norway	65,509	1.37	309,263	1.43
Russia	204,530	4.29	1,362,250	6.28
Switzerland	90,391	1.90	376,754	1.74
Rest of Europe	87,372	1.83	318,882	1.47
Japan	62,373	1.31	98,452	0.45
United States of America	273,399	5.74	604,096	2.78
Rest of America	220,295	4.62	505,285	2.33
Africa	42,791	0.90	107,910	0.50
Other countries	287,747	6.04	649,940	3.00

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

Hotel Price Index (HPI). 2008 Base

June 2014

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	94.1	0.9
Andalucía	89.0	1.9
Aragón	62.5	1.5
Asturias, Principado de	84.5	-1.7
Balears, Illes	105.5	1.2
Canarias	104.5	3.1
Cantabria	87.3	-2.4
Castilla y León	86.1	0.5
Castilla - La Mancha	81.9	-2.1
Cataluña	95.3	-0.4
Comunitat Valenciana	93.6	3.2
Extremadura	84.2	-2.7
Galicia	89.2	-1.1
Madrid, Comunidad de	74.8	-3.6
Murcia, Región de	76.4	2.4
Navarra, Comunidad Foral de	81.9	-1.6
País Vasco	93.5	1.8
Rioja, La	81.2	0.6
Ceuta	105.7	6.6
Melilla	104.8	3.9

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	94.1	0.9
HOTELS: Gold stars		
Five	90.9	1.6
Fourth	91.7	1.2
Three	97.3	0.4
Two	95.3	0.0
One	99.4	-0.9
HOSTALS: Silver stars		
Three and two	95.8	2.6
One	95.8	-4.9

Indicators on the Profitability of the Hotel Sector

June 2014

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	70.7	2.1	44.7	3.7
Andalucía	73.8	5.1	43.7	8.3
Aragón	50.1	-0.3	17.0	8.1
Asturias, Principado de	52.5	1.5	18.9	6.2
Balears, Illes	72.6	4.9	59.4	2.6
Canarias	72.8	2.6	54.3	7.1
Cantabria	56.5	-0.6	23.0	4.0
Castilla y León	52.9	1.8	19.5	5.7
Castilla - La Mancha	52.7	1.8	16.2	2.4
Cataluña	76.7	-0.5	50.0	-2.0
Comunitat Valenciana	62.4	3.6	41.1	7.7
Extremadura	53.6	3.2	18.0	0.3
Galicia	50.5	-0.2	18.2	6.3
Madrid, Comunidad de	74.8	-5.8	49.4	-1.6
Murcia, Región de	55.8	5.1	26.4	14.9
Navarra, Comunidad Foral de	57.6	-5.5	26.2	4.1
País Vasco	75.8	2.9	46.5	11.3
Rioja, La	60.0	2.5	31.1	8.6
Ceuta	72.0	3.3	48.6	14.2
Melilla	65.9	0.3	53.4	35.6

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	70.7	2.1	44.7	3.7
HOTELS: Gold stars				
Five	160.4	1.8	109.9	6.8
Four	78.2	1.9	56.8	3.4
Three	56.9	2.3	38.8	1.2
Two	49.2	-2.2	23.3	1.1
One	49.4	3.4	18.7	9.8
GUESTHOUSES: Silver stars				
Three and two	48.1	7.8	17.3	16.9
One	38.2	-15.2	12.6	-12.0

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

Indicators on Profitability (ANNEX OF TABLES) - June 2014
23rd July 2014