

24 July 2015

(Update 5 October 2015)

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
June 2015. *Provisional data*

Overnight stays in hotel establishments register an increase of 1.6% in June, as compared to the same month of 2014

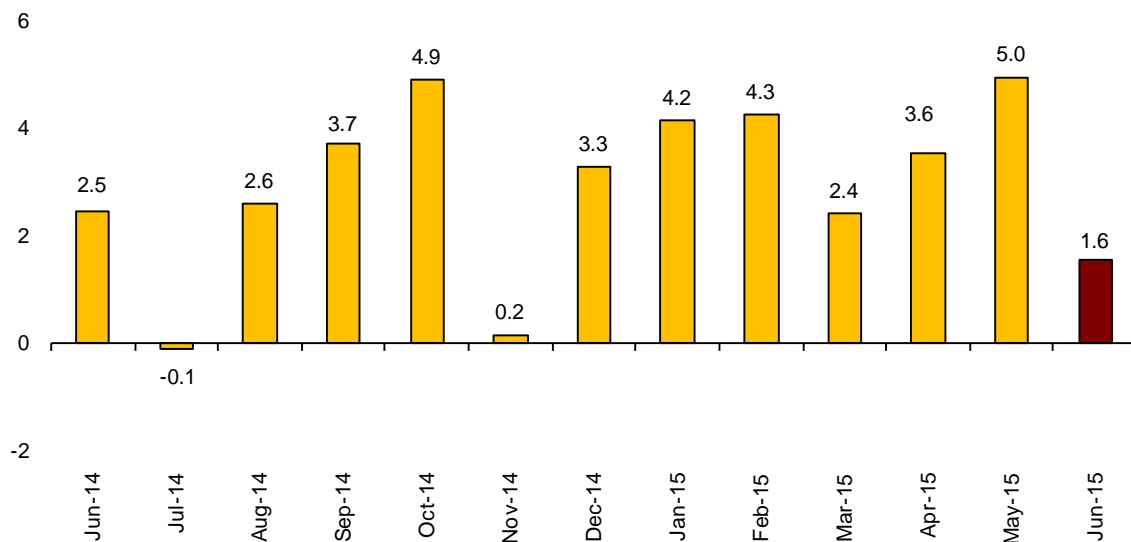
Hotels invoice an average of 76.2 euros per occupied room, which means an annual increase of 7.4%

In June, a total of 32.0 million overnight stays were registered in hotel establishments, 1.6% more than in the same month of 2014. Overnight stays for residents in Spain increased by 6.3%, whereas those of non-residents decreased by 0.6%.

The average stay decreased 2.7%, as compared to June 2014, standing at 3.4 nights per guest.

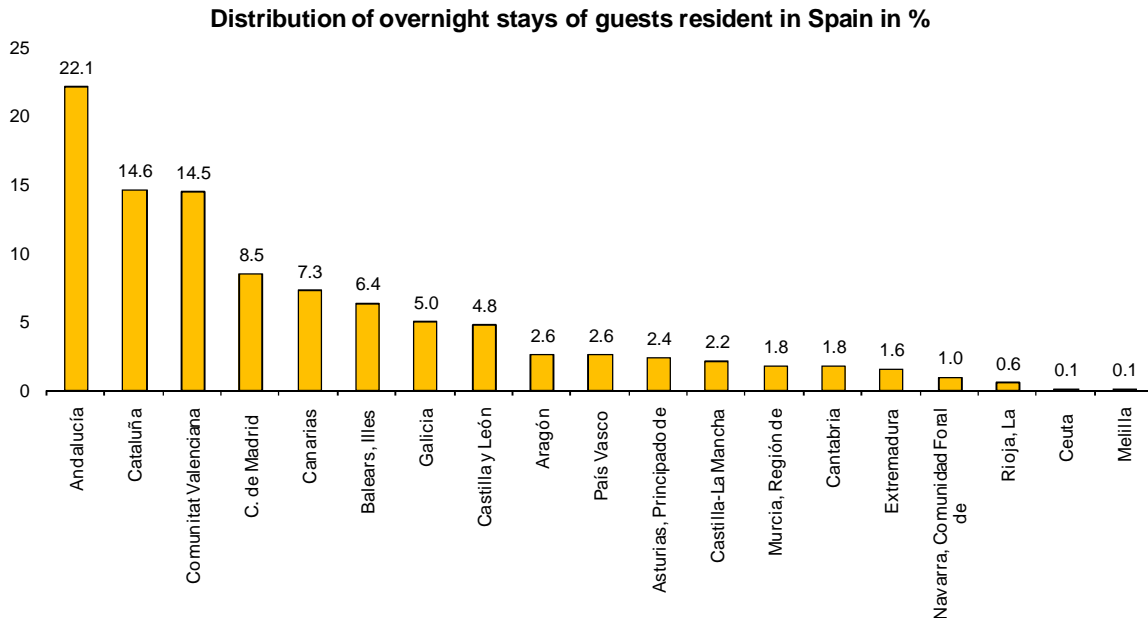
During the first six months of 2015, overnight stays increased 3.3%, as compared to the same period of the previous year.

Annual rates of overnight stays in %

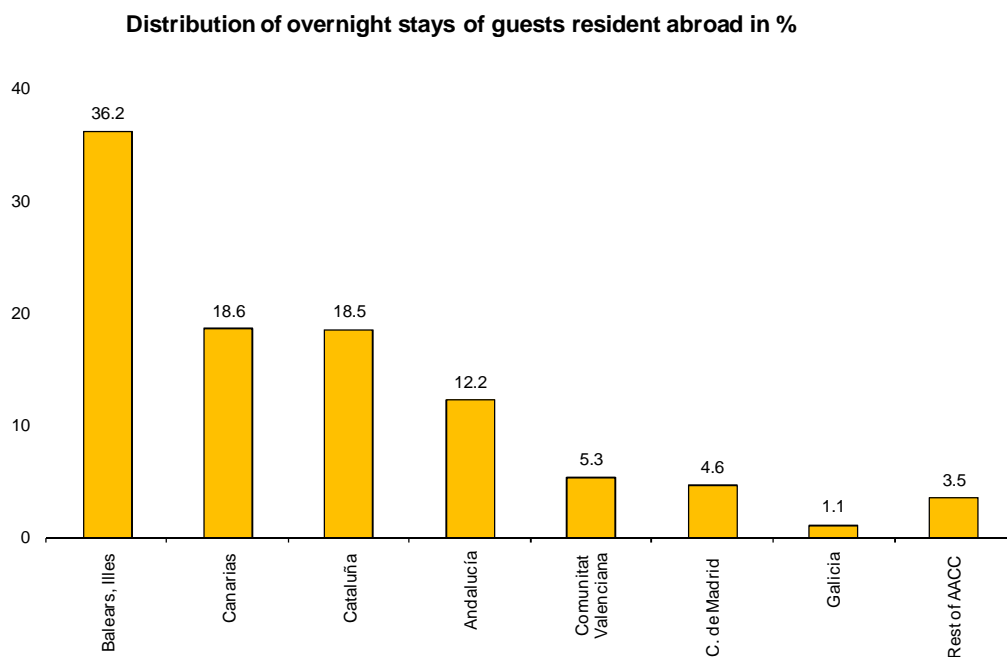


Main destinations

In June, Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 5.2%, 9.9%, 6.1% and 4.0%, respectively.

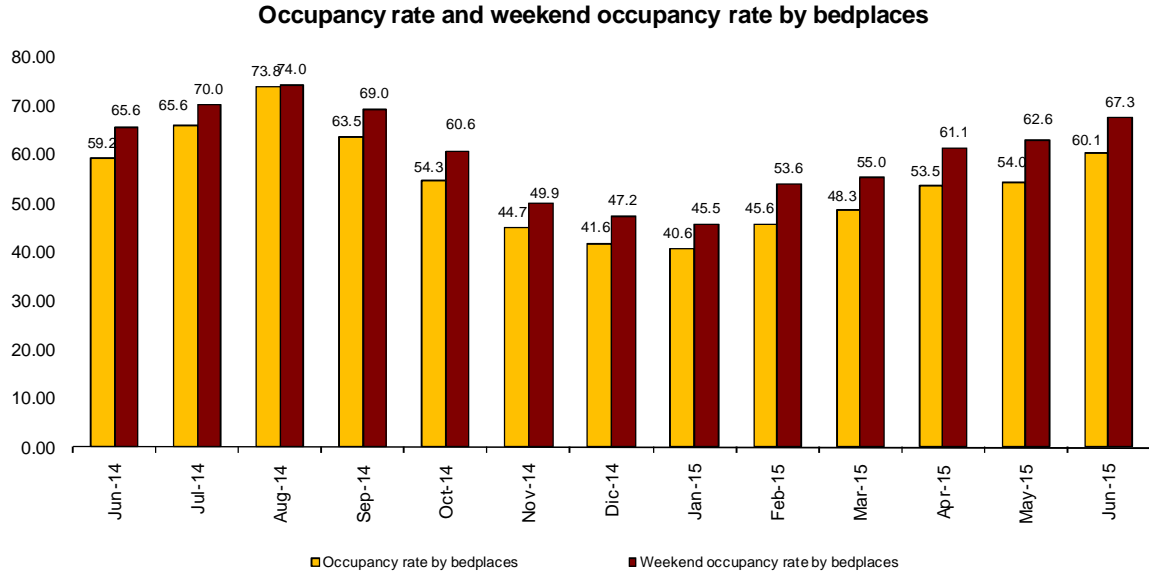


The main destination chosen by non-residents was Illes Balears, with 36.2% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 0.4% as compared to June 2014. The following destinations of non-residents were Canarias (18.6% of the total and an increase of 1.2%) and Cataluña (18.5% and a decrease of 10.6% in overnight stays).



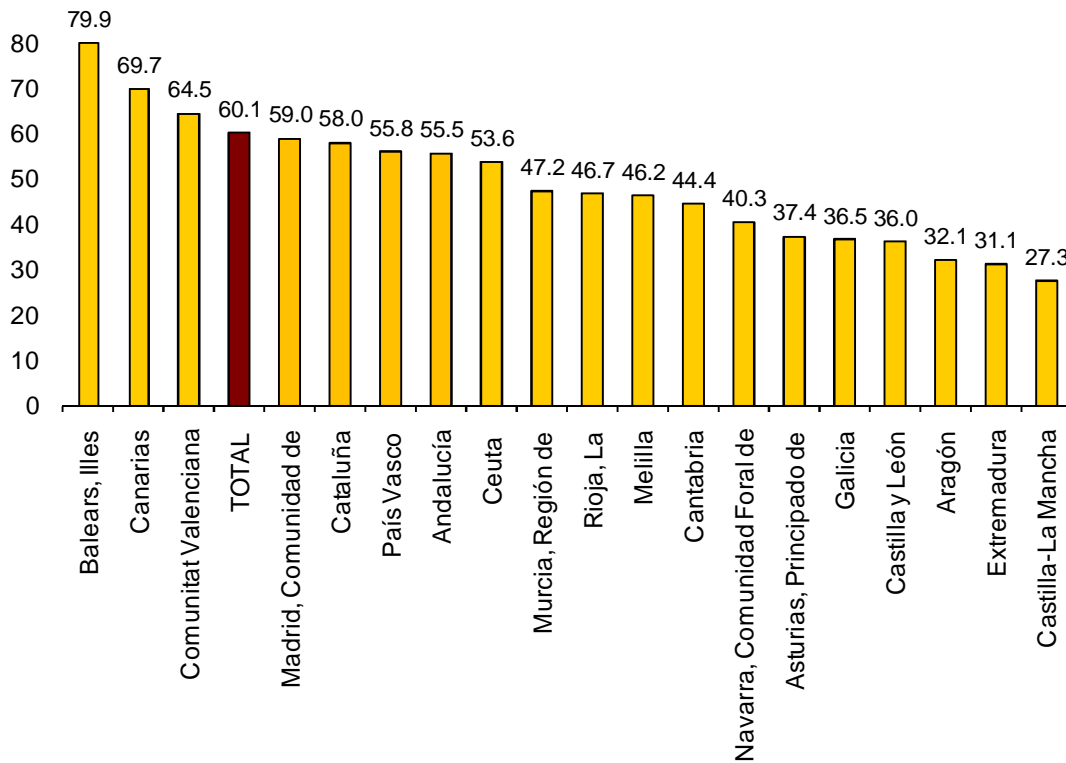
Hotel Occupancy

In June, 60.1% of the available bedplaces were occupied, indicating an annual increase of 1.6%. The weekend occupancy rate by bedplaces increased by 2.7%, standing at 67.3%.



Illes Balears registered the greatest occupancy rate by bedplaces in June (79.9%), followed by Canarias (69.7%) and Comunitat Valenciana (64.5%).

Occupancy rate by bedplaces by Autonomous Community



By tourist area, the island of Mallorca registered the highest occupancy rate by bedplaces (81.9%), while Costa Blanca recorded the highest weekend occupancy rate (86.2%). The island of Mallorca recorded the highest number of overnight stays, with more than 6.3 million.

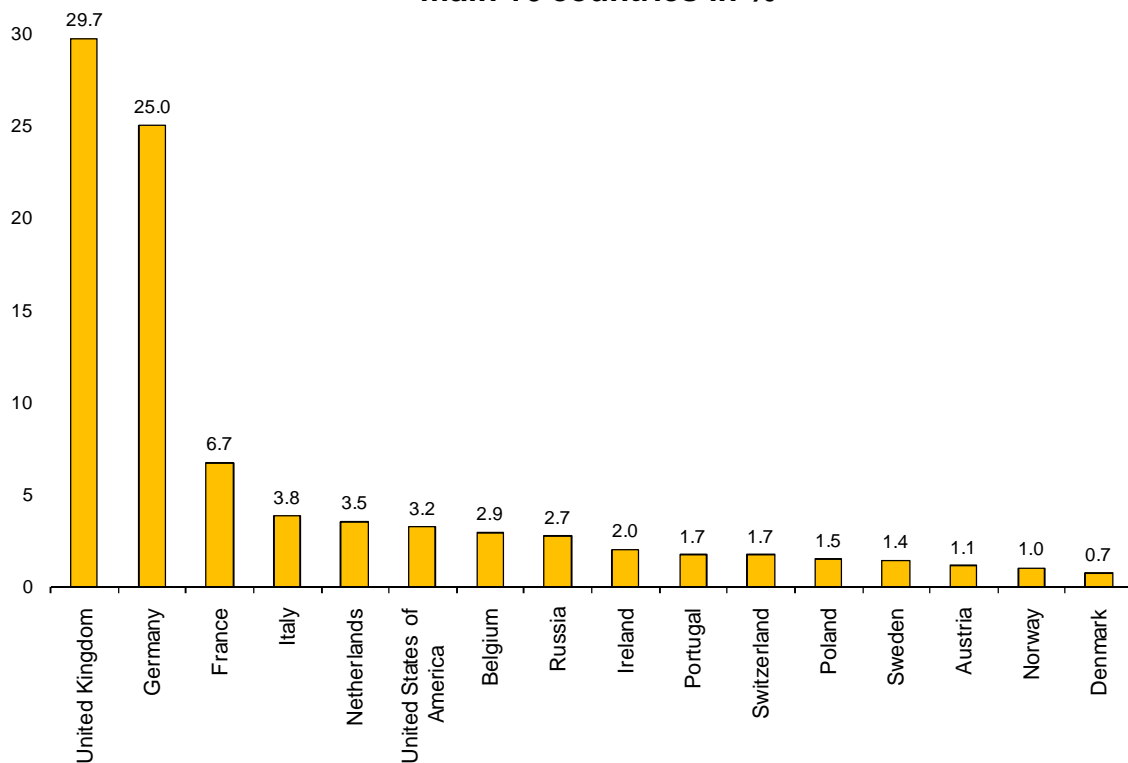
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Muro reached the highest occupancy rate by bedplaces (90.0%), while Benidorm registered the greatest weekend occupancy rate (91.9%).

Overnight stays according to the country of origin of the guests

Guests from United Kingdom and Germany concentrated 29.7% and 25.0%, respectively, of the total of overnight stays in hotel establishments by non-residents in June. The British market increased by 4.9%, while the German one decreased by 2.0%.

Overnight stays of guests from France, Italy and Netherlands (the following countries of origin) registered annual rates of 9.8%, 6.8% and 4.9%, respectively.

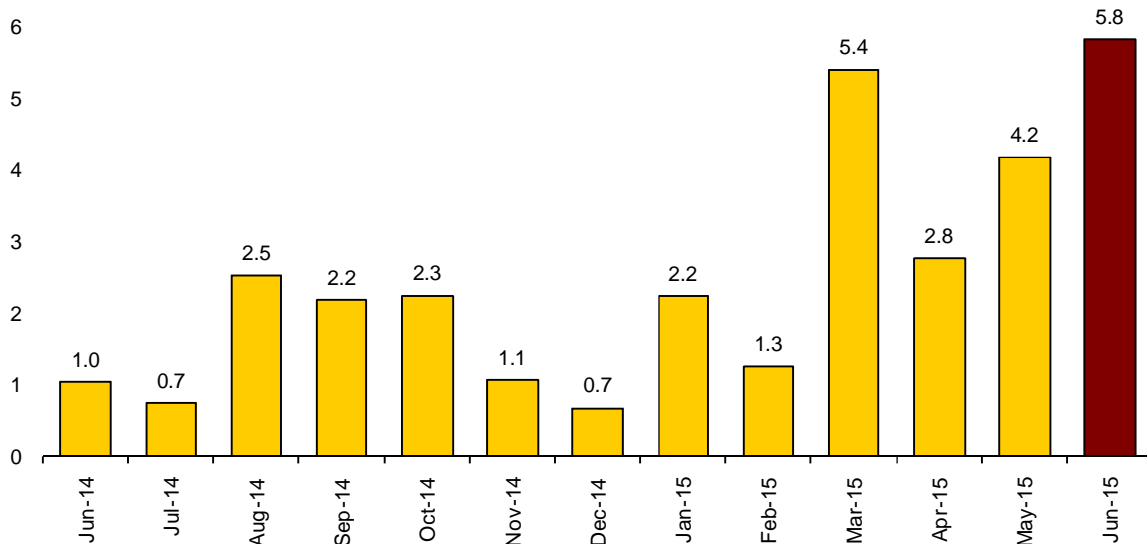
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 5.8% in June, that is, 1.6 points over that of the previous month and 4.8 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 (they represented 74.6% of the total). Hotel prices increased 8.7% in the annual rate in Illes Balears, 5.6% in Cataluña, 5.2% in Andalucía and 3.8% in Canarias.

By hotel category, the increase in hotel prices were registered in three-golden-star establishments (8.4%), five-golden-star establishments (6.2%), two-golden-star establishments (5.8%), one-golden-star establishments (5.6%), four-golden-star establishments (4.7%), and three-silver and two-silver establishments (2.7% in both cases).

In one-silver establishments prices decreased by 0.5%.

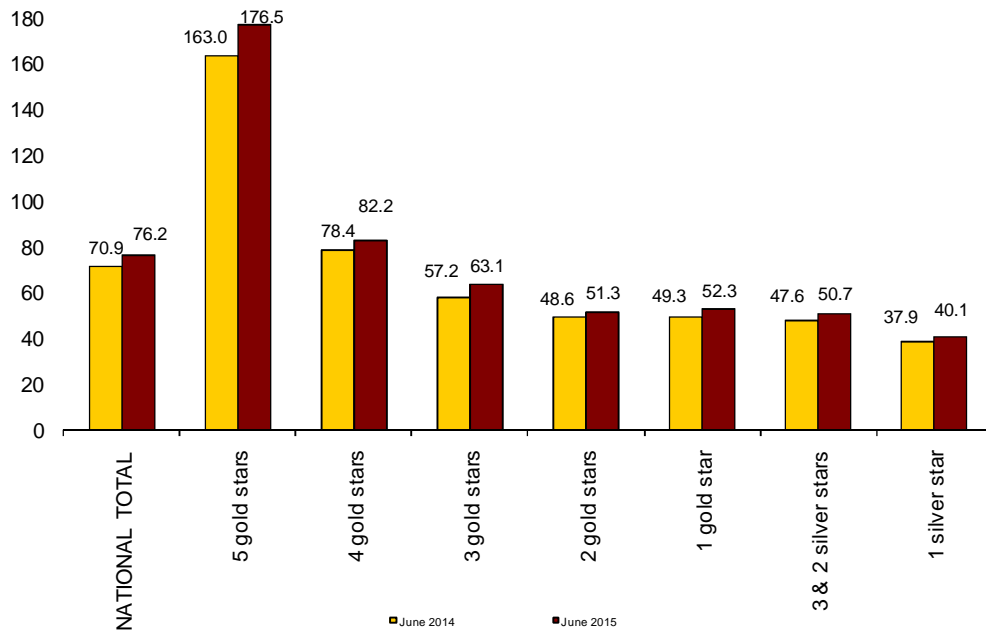
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in June was 76.2 euros, which represented an increase of 7.4% as compared to the same month of 2014.

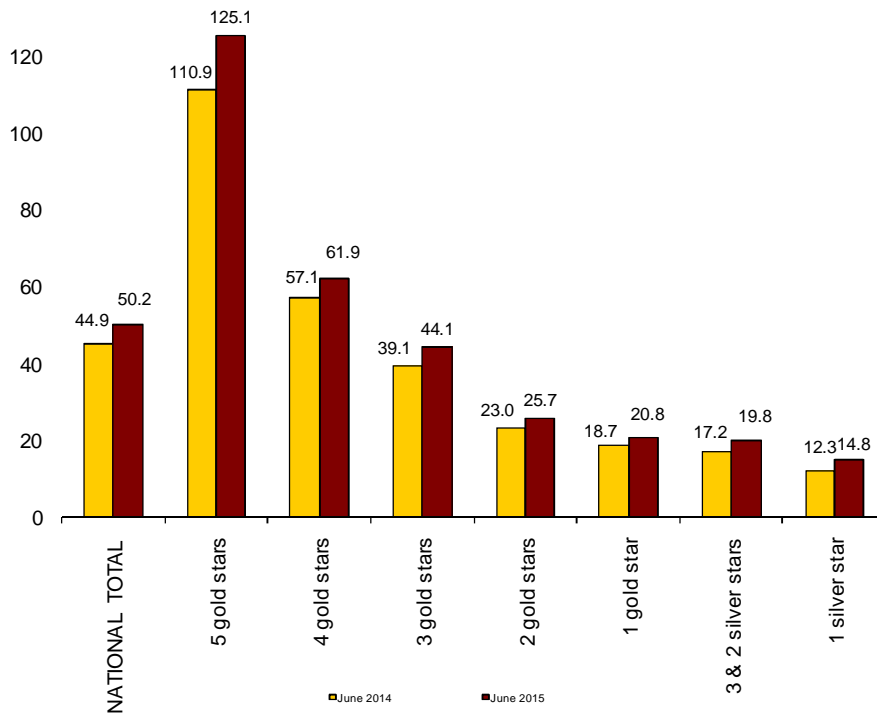
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 50.2 euros, with an increase of 11.8%.

By category, the average invoicing was 176.5 euros for five-star hotels, 82.2 euros for four-star hotels and 63.1 euros for three-star hotels. Income per available room for the same categories was 125.1, 61.9, and 44.1 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)

June 2015

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	9,434,356	4,545,729	4,888,627	32,062,337	10,489,940	21,572,397	3.40
HOTELS: Golden stars							
Five	485,360	154,919	330,442	1,622,148	317,675	1,304,474	3.34
Four	4,318,071	2,039,874	2,278,197	15,526,464	4,791,125	10,735,339	3.60
Three	2,767,533	1,283,880	1,483,653	10,520,818	3,230,229	7,290,589	3.80
Two	696,541	414,945	281,596	1,854,901	882,986	971,914	2.66
One	277,202	166,183	111,018	586,524	296,399	290,125	2.12
INNS: Silver stars							
Two and three	486,356	283,892	202,464	1,056,789	526,460	530,330	2.17
One	403,293	202,035	201,258	894,693	445,067	449,627	2.22
Annual rate	4.37	6.45	2.52	1.57	6.28	-0.58	-2.69
Cumulative annual rate	5.67	6.59	4.71	3.33	6.48	1.59	-2.22

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	16,293	836,663	1,732,286	60.10	67.30	65.39	231,705
HOTELS: Golden stars							
Five	279	41,786	86,884	61.54	68.86	70.77	28,688
Four	2,391	345,859	744,431	67.77	74.77	75.19	109,393
Three	2,951	251,750	525,580	64.70	71.29	69.18	63,017
Two	2,116	68,330	132,138	45.83	55.62	49.97	11,314
One	1,280	27,831	54,630	35.54	45.22	39.56	4,445
INNS: Silver stars							
Two and three	3,173	51,665	97,594	34.92	42.73	38.78	8,178
One	4,104	49,442	91,028	32.44	38.84	36.67	6,669
Annual rate	-1.46	-0.64	-0.28	1.58	2.66	3.19	3.65

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	89,785	912,466	380,665	5,973,868	81.90	82.99	84.60	6.34	36,886
Palma - Calvià	38,954	408,608	133,622	2,204,575	81.15	83.91	85.06	5.22	13,857
Isla de Lanzarote	20,514	85,572	125,466	723,737	78.57	77.23	86.32	8.00	5,812
Costa Blanca	211,803	156,726	787,041	847,474	77.15	86.23	78.27	4.44	8,866
Isla de Menorca	27,740	76,967	132,947	560,138	75.15	77.65	84.26	6.62	4,190
Barcelona	129,294	574,213	246,421	1,528,973	74.49	80.18	84.64	2.52	13,841
Islas de Ibiza-Formentera	45,886	224,648	162,339	1,270,251	74.15	77.89	75.11	5.30	10,530
Isla de Fuerteventura	14,053	105,354	70,489	913,997	73.71	74.68	80.95	8.24	6,825

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

Costa del Sol	199,790	288,087	532,714	1,390,549	70.88	78.50	79.51	3.94	12,713
Isla de Tenerife	80,909	167,209	317,748	1,362,654	68.14	71.92	73.49	6.77	14,945
Sur de Tenerife	43,408	146,172	152,397	1,201,878	71.12	74.06	77.05	7.14	11,977
Costa Brava	166,011	205,949	354,130	894,798	53.67	65.35	55.70	3.36	8,443
Isla de Gran Canaria	64,406	112,147	224,023	975,945	65.78	70.09	72.91	6.80	10,509
Costa Daurada	182,268	128,701	452,807	728,624	55.53	61.76	61.26	3.80	5,697
Sur de Gran Canaria	43,909	105,998	176,680	953,748	69.77	73.90	76.82	7.54	9,494
Costa Barcelona	135,124	197,593	285,477	791,636	59.10	63.70	65.10	3.24	6,448

Tourist site with a greater occupancy rate per month

Muro	3,822	47,456	10,791	386,869	89.96	87.05	89.64	7.76	2,150
Benidorm	98,974	91,609	489,641	611,708	85.38	91.90	85.45	5.78	5,254
Santa Margalida	1,223	43,637	4,633	356,022	85.11	86.10	83.60	8.04	1,684
Sant Llorenç des Cardassar	1,955	70,170	6,978	591,617	85.10	83.24	89.49	8.30	3,178
Son Servera	1,497	26,996	4,364	239,765	84.91	86.24	90.36	8.57	1,236
Tías	3,948	28,558	25,196	239,979	84.30	84.97	90.01	8.16	1,696
Pollença	1,650	19,407	4,136	135,311	82.84	89.88	87.81	6.62	1,278
Alcúdia	2,608	60,603	12,985	506,963	82.51	80.78	83.58	8.23	3,875
Palma	26,497	194,298	84,440	939,699	82.10	85.74	86.08	4.64	6,421
Santanyí	3,788	40,844	13,552	308,245	81.77	87.24	85.92	7.21	1,557

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

Barcelona	120,515	548,296	228,619	1,459,081	75.22	81.38	85.11	2.52	13,234
Madrid	370,996	404,840	619,289	912,082	62.60	69.70	75.76	1.97	11,187
Calvià	11,329	193,419	46,888	1,165,535	78.68	80.21	83.68	5.92	6,797
San Bartolomé de Tirajana	35,213	78,808	142,133	716,286	70.73	76.64	77.95	7.53	7,520
Salou	69,870	86,372	180,383	556,217	64.46	66.70	67.66	4.71	2,968
Adeje	21,444	75,133	79,230	627,842	71.88	75.53	78.47	7.32	6,500
Pájara	7,277	66,516	34,782	588,233	76.68	78.31	81.40	8.44	4,378
Lloret de Mar	45,151	81,443	102,920	454,022	60.14	70.45	61.50	4.40	2,580
Torremolinos	50,695	60,160	165,887	348,258	80.54	88.49	84.60	4.64	2,672
Arona	9,059	48,606	31,792	384,223	73.68	76.40	78.94	7.21	2,921

* 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	9,434,356	100.00	32,062,337	100.00
Residents in Spain	4,545,729	48.18	10,489,940	32.72
Residents abroad	4,888,627	51.82	21,572,397	67.28
Total Residents abroad	4,888,627	100.00	21,572,397	100.00
Total Residents in E.U. (without Spain)	3,543,431	72.48	17,889,182	82.93
- Germany	854,474	17.48	5,392,073	25.00
- Austria	58,315	1.19	238,143	1.10
- Belgium	122,013	2.50	617,682	2.86
- Denmark	37,745	0.77	159,005	0.74
- Finland	25,728	0.53	93,844	0.44
- France	459,083	9.39	1,449,510	6.72
- Greece	9,352	0.19	23,600	0.11
- Ireland	88,446	1.81	424,307	1.97
- Italy	251,705	5.15	819,005	3.80
- Luxembourg	8,493	0.17	43,313	0.20
- Netherlands	164,680	3.37	753,524	3.49
- Poland	72,054	1.47	317,571	1.47
- Portugal	127,575	2.61	366,413	1.70
- United Kingdom	1,079,392	22.08	6,409,587	29.71
- Czech Republic	28,207	0.58	145,960	0.68
- Sweden	67,496	1.38	309,351	1.43
- Other EU countries*	88,671	1.81	326,292	1.51
Norway	50,790	1.04	215,928	1.00
Russia	101,665	2.08	576,378	2.67
Switzerland	87,365	1.79	361,385	1.68
Rest of Europe	94,358	1.93	330,106	1.53
Japan	54,926	1.12	90,182	0.42
United States of America	308,590	6.31	680,841	3.16
Rest of America	251,037	5.14	573,307	2.66
Africa	41,175	0.84	95,472	0.44
Other countries	355,289	7.27	759,617	3.52

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

Hotel Price Index (HPI). 2008 Base

June 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	99.7	5.8
Andalucía	94.6	5.2
Aragón	64.6	3.4
Asturias, Principado de	82.5	-2.2
Balears, Illes	115.0	8.7
Canarias	108.5	3.8
Cantabria	89.7	3.0
Castilla y León	86.7	1.0
Castilla - La Mancha	83.8	2.3
Cataluña	100.5	5.6
Comunitat Valenciana	99.0	5.7
Extremadura	85.5	2.6
Galicia	91.0	2.0
Madrid, Comunidad de	80.1	7.1
Murcia, Región de	77.4	0.7
Navarra, Comunidad Foral de	81.3	-0.7
País Vasco	96.8	3.9
Rioja, La	81.4	0.2
Ceuta	101.6	-3.9
Melilla	105.2	0.4

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	99.7	5.8
HOTELS: Gold stars		
Five	96.7	6.2
Fourth	96.0	4.7
Three	106.1	8.4
Two	100.1	5.8
One	105.6	5.6
HOSTALS: Silver stars		
Three and two	97.7	2.7
One	95.2	-0.5

Indicators on the Profitability of the Hotel Sector

June 2015

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	76.2	7.4	50.2	11.8
Andalucía	76.0	3.0	47.9	10.1
Aragón	51.8	3.1	18.9	11.3
Asturias, Principado de	51.0	-3.0	21.3	13.0
Balears, Illes	82.8	13.5	68.9	15.2
Canarias	75.5	3.1	58.3	6.9
Cantabria	58.2	2.9	28.3	23.7
Castilla y León	53.8	2.3	22.1	14.4
Castilla - La Mancha	52.8	1.3	16.9	4.4
Cataluña	85.3	10.3	55.3	9.2
Comunitat Valenciana	67.0	7.9	45.8	11.7
Extremadura	54.7	3.6	19.2	7.5
Galicia	52.6	4.5	21.2	17.6
Madrid, Comunidad de	79.9	6.3	57.2	15.2
Murcia, Región de	56.3	0.4	28.2	6.7
Navarra, Comunidad Foral de	60.2	4.9	28.4	11.2
País Vasco	78.2	3.7	52.0	12.1
Rioja, La	58.3	-3.0	32.3	4.1
Ceuta	71.3	-0.9	35.0	-27.9
Melilla	64.4	-2.4	42.0	-21.4

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	76.2	7.4	50.2	11.8
HOTELS: Gold stars				
Five	176.5	8.3	125.1	12.9
Four	82.2	4.9	61.9	8.6
Three	63.1	10.4	44.1	12.7
Two	51.3	5.6	25.7	11.4
One	52.3	6.2	20.8	11.6
GUESTHOUSES: Silver stars				
Three and two	50.7	6.6	19.8	15.0
One	40.1	5.9	14.8	20.6

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