

23 July 2018

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
June 2018 *Provisional data*

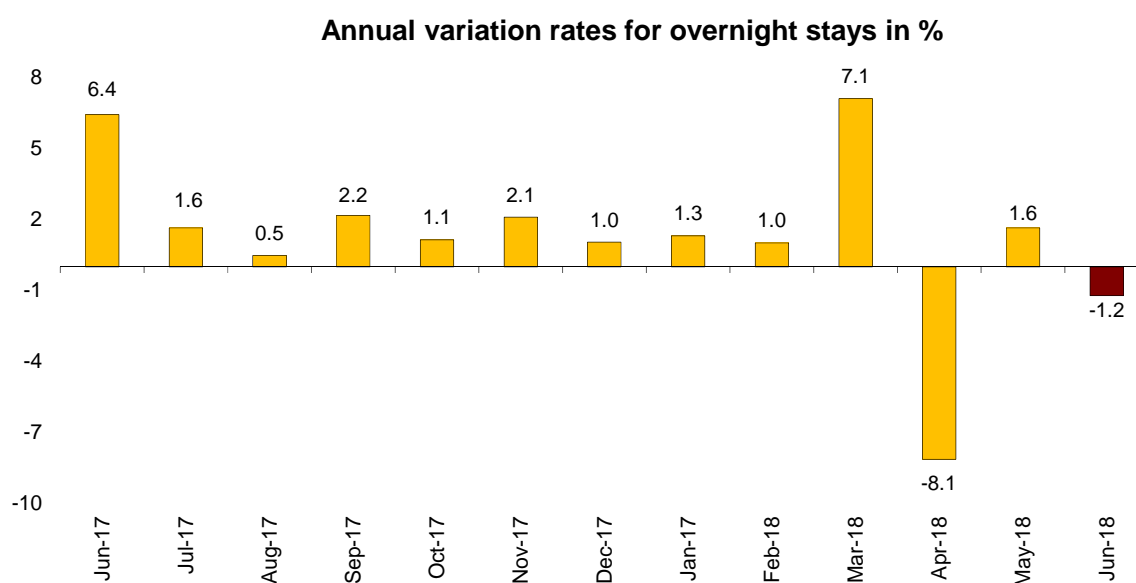
Overnight stays in hotel establishments decrease 1.2% in June as compared with the same month of 2017

Hotels invoice an average of 88.7 euros per occupied room, representing an annual increase of 1.6%

During the month of June overnight stays in hotel establishments exceeded 36.1 million, 1.2% less than in the same month of 2017. Overnight stays by residents in Spain increased by 0.1%, while those of non-residents decreased by 1.8%.

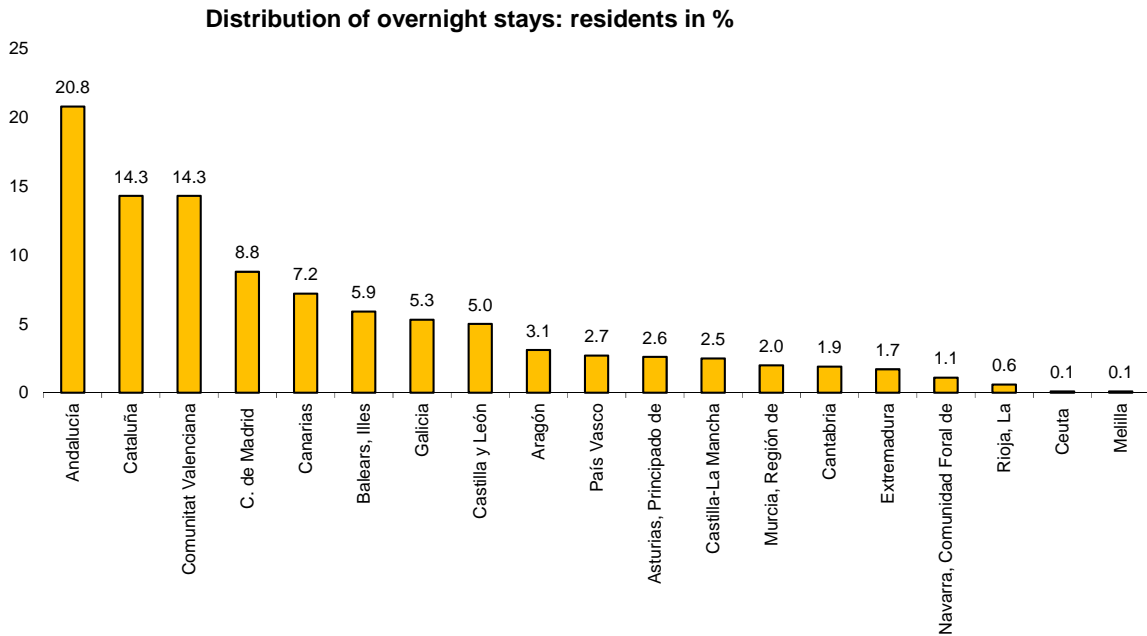
The average stay decreased 3.2% as compared with June 2017, standing at 3.3 overnight stays per traveller.

During the first six months of 2018, overnight stays decreased by 0.2% as compared with the same period of the previous year.

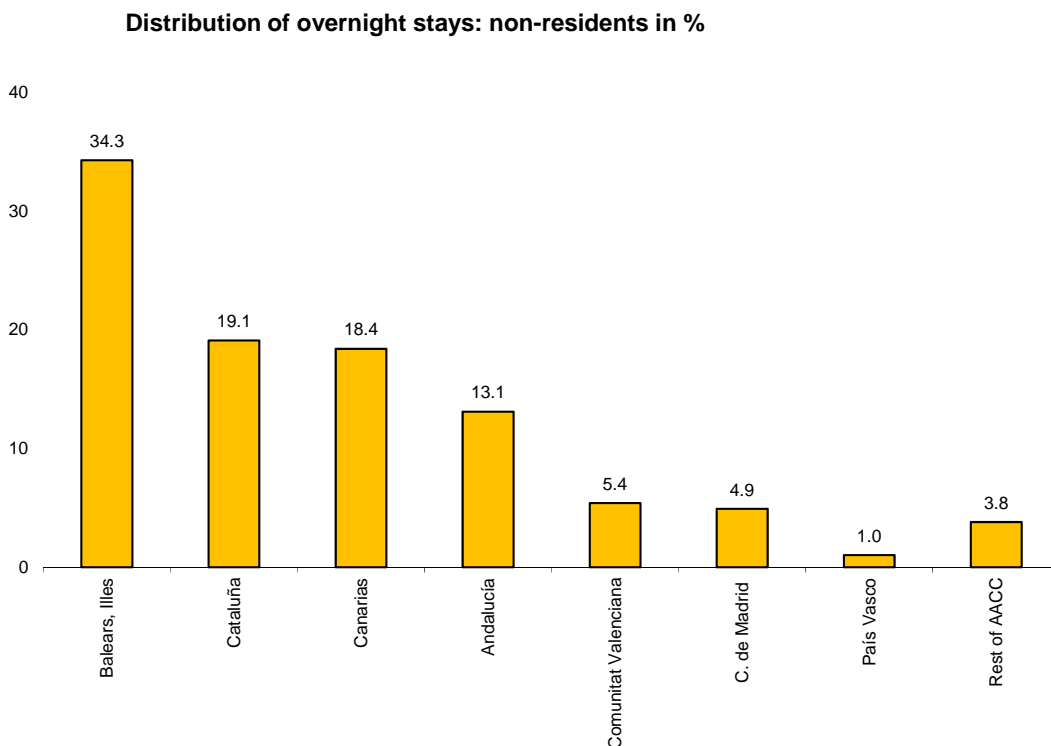


Destinations

Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of travellers resident in Spain in June, with annual variation rates in the number of overnight stays of 3.0%, -10.2%, 0.3% and 6.6%, respectively.



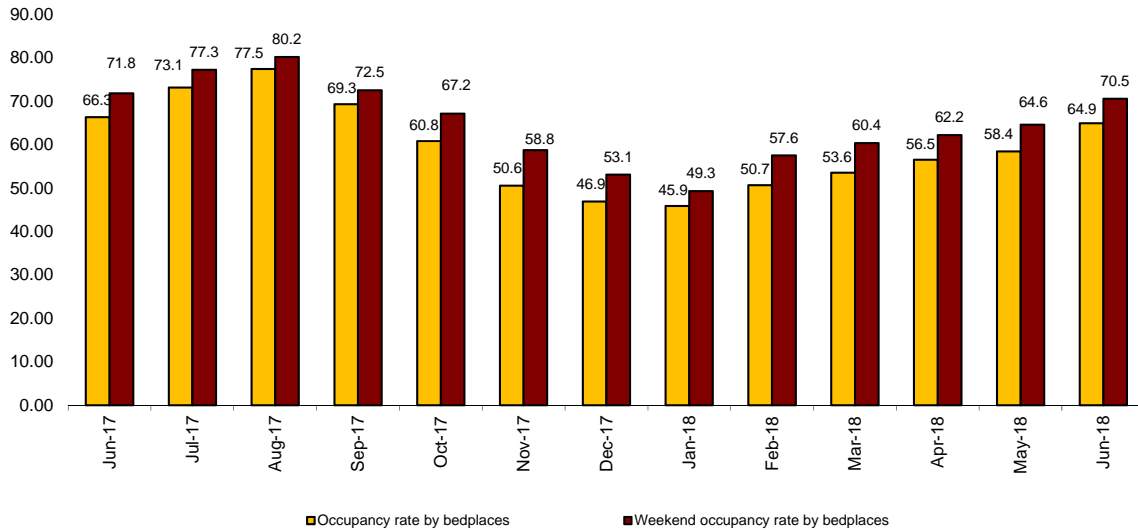
The main destination chosen by non-residents was Illes Balears, with 34.3% of total overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased by 0.2% as compared to June 2017. The following destinations of non-residents were Cataluña (with 19.1% of the total overnight stays and a decrease of 2.3%) and Canarias (with 18.4% of the total and a decrease of 4.8%).



Hotel occupancy

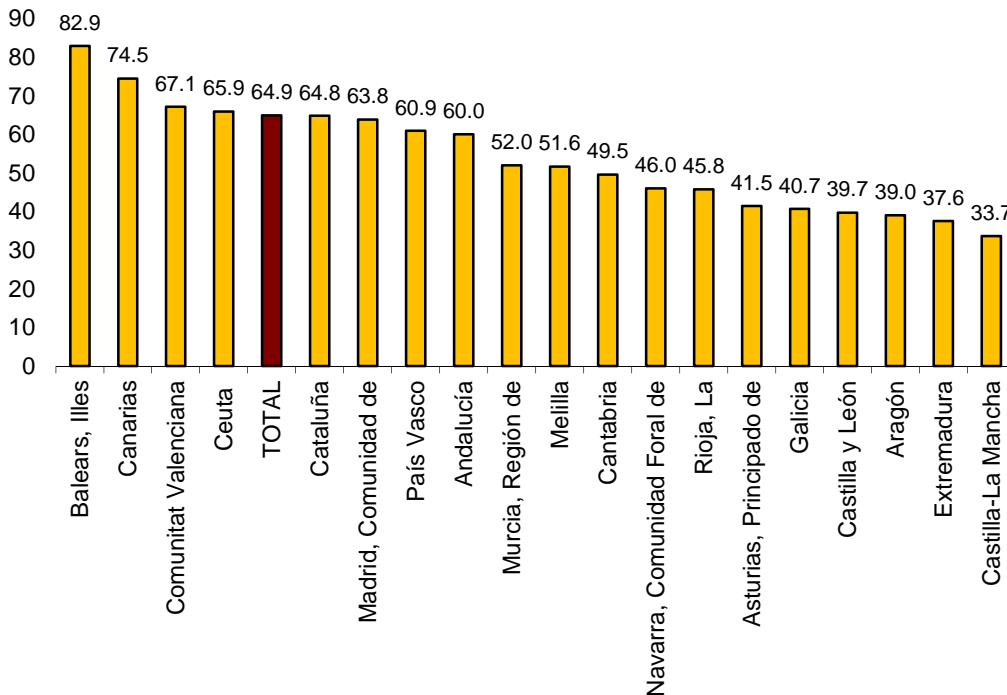
In June, 64.9% of the available bed-places were occupied, indicating an annual decrease of 2.1%. The weekend occupancy rate by bed-places decreased by 1.8%, standing at 70.5%.

Occupancy rate and weekend occupancy rate per bed-places



Illes Balears showed the highest occupancy rate by bed-places in June (82.9%). It was followed by Canarias (74.5%) and Comunitat Valenciana (67.1%).

Occupancy rate per bed-places by Autonomous Community



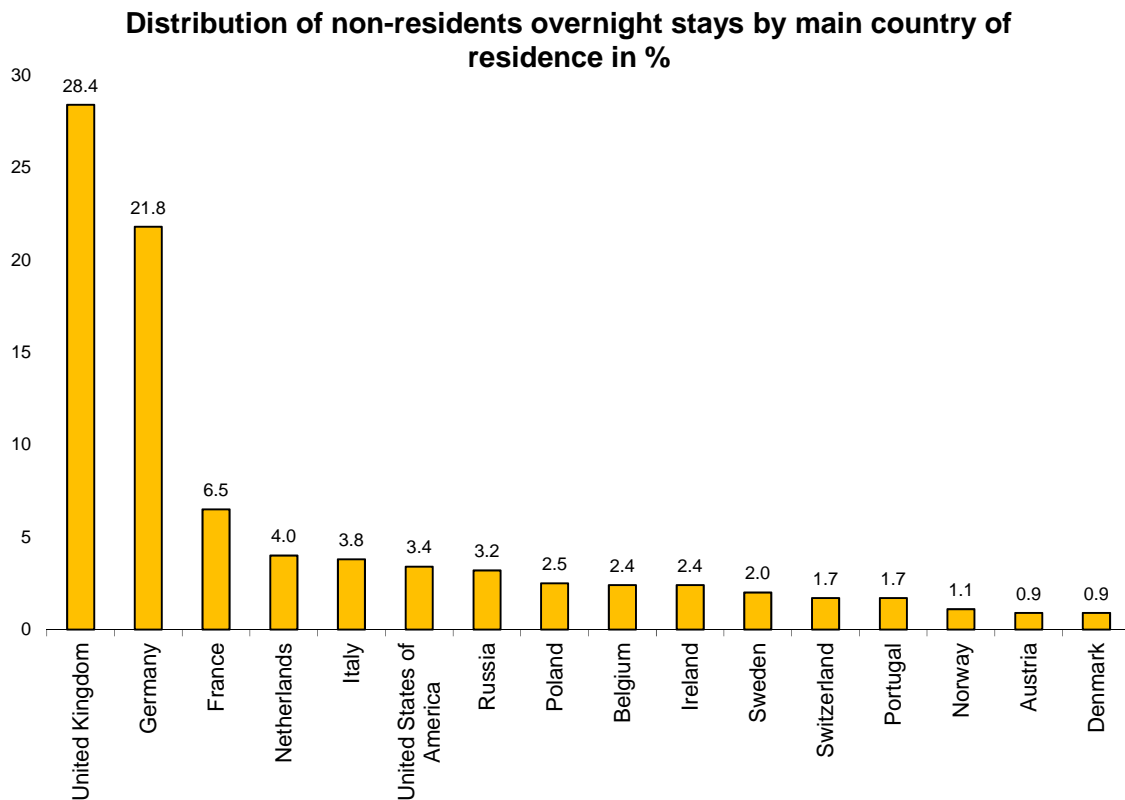
By tourist areas, Palma-Calvià reached both the greatest occupancy rate by bed-places (83.7%) and the greatest weekend occupancy rate (86.1%). The island of Mallorca registered the highest number of overnight stays, with 6.9 million.

The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Pollença reached the highest occupancy rate by bed-places (92.9%) and Palma de Mallorca registered the greatest weekend occupancy rate (90.1%).

Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany concentrated 28.4% and 21.8%, respectively, of total overnight stays of non-residents in hotel establishments in June. The British market remained unchanged, while the German market fell by 11.7%.

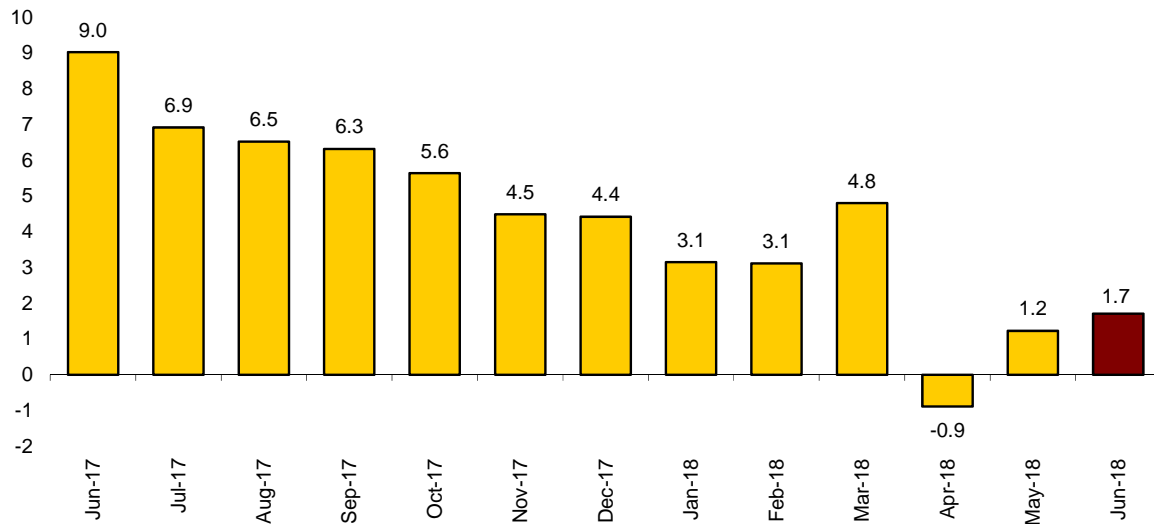
Overnight stays of travellers from France, the Netherlands and Italy (the following countries of origin) registered annual rates of 7.3%, 4.1% and -1.0%, respectively.



Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 1.7% in June, which is 0.5 points more than last month and 7.3 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 June (accounting for 75.0% of the total weight). Hotel prices increased by 5.1% in the annual rate in Illes Balears, 2.5% in Andalucía and 1.8% in Canarias. In turn, they fell by 1.0% in Cataluña.

By category, prices rose in all one-silver-star establishments (6.6%), in two-gold-star establishments (5.6%), in three-gold-star establishments (3.4%), in three and two-silver-star establishments (2.2%), in four-gold-star establishments (1.1%) and in one-gold-star establishments (0.5%).

In turn, prices fell by 1.1% in five-gold-star establishments.

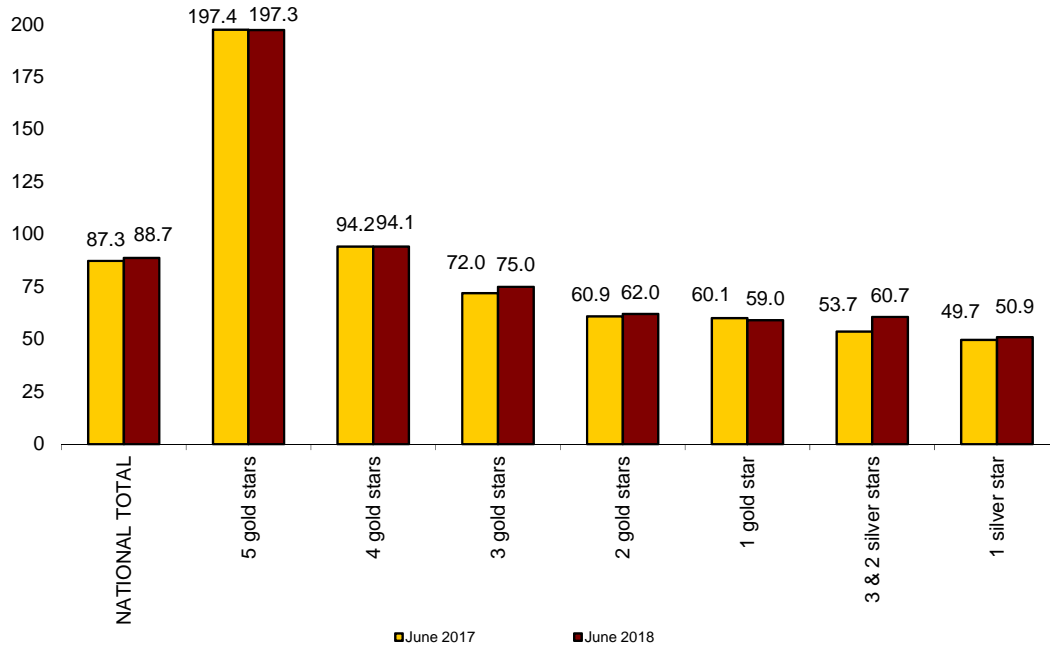
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 88.7 euros in June, which means an increase of 1.6% as compared with the same month of 2017.

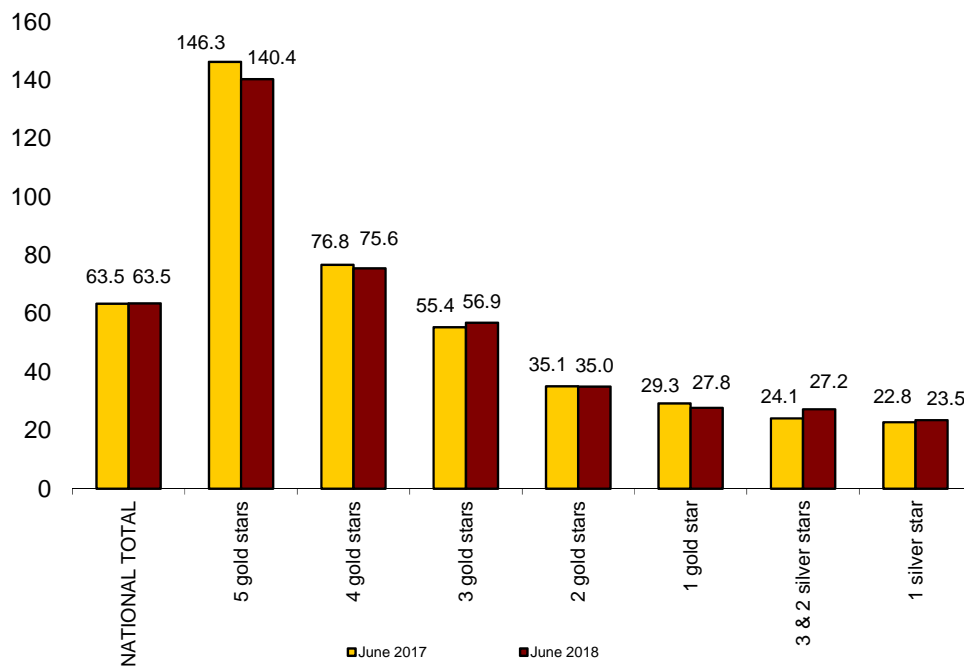
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 63.5 euros, with a 0.1% increase.

By category, the average rate was 197.3 euros for five-star hotels, 94.1 euros for four-star hotels and 75.0 euros for three-star hotels. Revenues per available room for these same categories were 140.4, 75.6 and 56.9 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 2018

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	10,859,335	4,875,692	5,983,643	36,198,765	10,859,920	25,338,845	3.33
HOTELS: Golden stars							
Five	593,280	170,624	422,656	1,971,950	368,428	1,603,522	3.32
Four	4,981,841	2,106,048	2,875,792	17,849,420	4,893,167	12,956,253	3.58
Three	3,153,026	1,371,869	1,781,157	11,521,076	3,245,989	8,275,088	3.65
Two	807,490	459,751	347,739	1,996,642	864,806	1,131,837	2.47
One	308,682	186,557	122,125	676,847	360,020	316,827	2.19
INNS: Silver stars							
Two and three	518,251	318,813	199,438	1,079,634	592,894	486,740	2.08
One	496,766	262,029	234,736	1,103,196	534,616	568,579	2.22
Annual rate	2.06	1.88	2.20	-1.22	0.08	-1.77	-3.21
Cumulative annual rate	1.18	0.73	1.62	-0.24	-0.21	-0.26	-1.40

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	16,543	861,061	1,801,601	64.94	70.54	71.51	260,210
HOTELS: Golden stars							
Five	326	48,762	103,248	62.73	68.51	71.27	35,015
Four	2,603	373,613	811,008	71.14	76.75	80.22	126,490
Three	2,959	243,572	512,926	71.72	75.37	76.48	66,767
Two	2,108	67,446	132,645	49.66	58.61	55.86	12,599
One	1,333	28,982	56,625	39.66	48.21	45.39	4,803
INNS: Silver stars							
Two and three	3,187	49,468	94,727	37.81	46.21	43.46	7,857
One	4,027	49,218	90,422	40.06	46.77	46.11	6,679
Annual rate	0.64	0.89	1.26	-2.09	-1.75	-0.92	1.87

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	55,267	509,390	180,831	2,492,387	83.65	86.09	86.94	4.73	18,076
Isla de Mallorca	99,726	1,077,046	357,496	6,578,424	83.59	83.60	87.22	5.89	43,773
Islas de Ibiza-Formentera	43,145	293,770	135,640	1,483,194	82.57	84.26	85.32	4.80	11,514
Isla de Menorca	34,117	91,383	145,191	634,908	78.07	81.23	86.04	6.22	4,671
Isla de Lanzarote	23,231	103,579	110,601	810,725	77.48	76.13	86.90	7.27	6,825
Sur de Gran Canaria	38,739	133,513	151,974	1,120,344	77.31	80.15	83.18	7.39	10,384
Costa Blanca	209,891	202,959	698,851	982,574	75.62	81.86	80.58	4.07	9,916
Sur de Tenerife	42,168	176,912	159,692	1,368,077	75.46	78.45	79.77	6.97	14,679

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

Costa del Sol	164,045	364,187	403,818	1,627,670	74	78	84	4	14,788
Isla de Tenerife	88,171	210,314	359,301	1,615,351	74	77	79	7	18,370
Barcelona	152,125	645,498	277,819	1,637,594	74	78	87	2	14,682
Costa Daurada	179,209	171,905	444,843	1,000,122	69	73	74	4	6,543
Costa Brava	169,906	279,579	338,082	1,081,073	58	68	62	3	9,096
Isla de Gran Canaria	62,302	144,008	209,271	1,158,974	75	77	81	7	11,266
Costa Barcelona	146,261	272,535	265,856	1,077,003	70	74	77	3	7,469
Isla de Fuerteventura	17,158	123,826	67,469	1,022,245	75	75	83	8	7,943

Tourist site with a greater occupancy rate per month

Pollença	1,165	25,970	3,485	160,706	92.93	89.32	92.22	6.05	1,348
Santa Margalida	2,973	44,949	10,642	371,225	90.11	82.42	91.34	7.97	2,118
Palma de Mallorca	45,608	296,569	108,990	1,134,689	87.73	90.12	89.66	3.63	8,155
Alcúdia	2,883	78,872	13,677	573,184	86.59	85.61	90.06	7.18	3,096
Sant Antoni de Portmany	11,509	70,717	37,406	307,984	86.47	80.32	86.87	4.20	1,690
Santa Eulària des Riu	5,666	69,759	22,619	415,089	86.46	89.62	89.05	5.80	3,101
Manacor	3,922	63,145	12,724	459,151	85.65	84.48	89.56	7.04	2,211
Torremolinos	32,599	72,989	106,091	437,827	84.75	87.85	88.38	5.15	2,922
Formentera	6,757	22,060	22,586	117,857	84.66	84.45	88.60	4.87	933
Sant Llorenç des Cardassar	1,521	75,472	3,996	616,128	84.39	76.73	89.42	8.05	3,770

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

Barcelona	139,686	617,482	254,276	1,576,355	75.36	79.08	87.20	2.42	13,998
Madrid	386,169	483,046	624,888	1,101,096	65.46	71.54	81.21	1.99	11,747
Calvià	17,710	219,683	80,721	1,296,824	81.71	84.13	85.43	5.80	9,324
Benidorm	90,798	112,675	420,260	658,069	79.83	83.77	83.89	5.30	5,817
San Bartolomé de Tirajana	28,581	97,207	113,712	831,693	79.11	81.58	84.41	7.52	8,109
Salou	69,321	116,259	181,218	759,690	80.63	80.84	83.18	5.07	3,338
Adeje	21,475	90,270	76,991	697,866	73.28	77.43	77.82	6.93	8,483
Pájara	8,739	74,161	36,912	609,412	76.98	77.63	81.17	7.80	4,624
Lloret de Mar	37,566	110,566	85,298	553,226	69.71	74.37	73.38	4.31	2,884
Arona	8,081	57,921	35,475	455,660	81.90	82.69	85.09	7.44	3,392

*Sin considerar los incluidos en la tabla anterior, por aparecer también con mayor grado de ocupación.

4. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	10,859,335	100.00	36,198,765	100.00
Residentes en España	4,875,692	44.90	10,859,920	30.00
Residentes en el extranjero	5,983,643	55.10	25,338,845	70.00
TOTAL residentes en el extranjero	5,983,643	100.00	25,338,845	100.00
TOTAL residentes en U.E. (sin España)	4,218,119	70.49	20,426,354	80.61
- Alemania	910,600	15.22	5,527,279	21.81
- Austria	51,524	0.86	228,765	0.90
- Bélgica	133,106	2.22	614,546	2.43
- Dinamarca	47,587	0.80	222,094	0.88
- Finlandia	33,939	0.57	124,502	0.49
- Francia	546,983	9.14	1,653,270	6.52
- Grecia	14,738	0.25	37,351	0.15
- Irlanda	120,166	2.01	603,311	2.38
- Italia	294,626	4.92	960,701	3.79
- Luxemburgo	7,979	0.13	38,535	0.15
- Países Bajos	224,443	3.75	1,008,633	3.98
- Polonia	114,216	1.91	629,591	2.48
- Portugal	149,280	2.49	431,509	1.70
- Reino Unido	1,298,710	21.70	7,190,728	28.38
- República Checa	39,210	0.66	192,327	0.76
- Suecia	103,646	1.73	495,669	1.96
- Resto de la UE*	127,366	2.13	467,543	1.85
Noruega	57,786	0.97	272,619	1.08
Rusia	134,376	2.25	802,780	3.17
Suiza	105,818	1.77	440,930	1.74
Resto de Europa	122,954	2.05	479,262	1.89
Japón	48,644	0.81	92,072	0.36
Estados Unidos	382,676	6.40	853,662	3.37
Resto de América	362,100	6.05	840,469	3.32
Países africanos	55,510	0.93	138,087	0.54
Resto del mundo	495,660	8.28	992,611	3.92

*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 2018

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	116.74	1.71
Andalucía	108.61	2.49
Aragón	68.09	3.15
Asturias, Principado de	89.79	-1.72
Balears, Illes	144.29	5.08
Canarias	127.13	1.75
Cantabria	98.26	1.16
Castilla y León	93.93	2.66
Castilla - La Mancha	86.89	1.91
Cataluña	113.92	-0.92
Comunitat Valenciana	117.91	4.00
Extremadura	91.86	2.59
Galicia	96.58	0.47
Madrid, Comunidad de	89.17	-7.41
Murcia, Región de	85.71	3.32
Navarra, Comunidad Foral de	86.68	2.40
País Vasco	116.24	6.62
Rioja, La	83.50	0.22
Ceuta	104.45	-2.15
Melilla	106.28	5.09

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	116.74	1.71
HOTELS: Gold stars		
Five	106.18	-1.08
Fourth	111.19	1.05
Three	129.64	3.44
Two	123.80	5.60
One	121.86	0.46
HOSTALS: Silver stars		
Three and two	111.97	2.21
One	116.54	6.62

Indicators on the Profitability of the Hotel Sector

June 2018

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	88.73	1.64	63.54	0.13
Andalucía	87.48	1.19	60.50	0.04
Aragón	53.43	2.82	24.55	10.47
Asturias, Principado de	57.16	2.69	25.89	0.88
Balears, Illes	103.45	4.97	90.17	3.87
Canarias	87.99	3.80	71.93	0.99
Cantabria	61.69	-6.43	32.51	-7.58
Castilla y León	57.37	2.75	26.24	3.88
Castilla - La Mancha	54.82	2.86	21.49	8.68
Cataluña	94.75	0.55	68.28	-3.78
Comunitat Valenciana	80.19	3.55	58.49	3.18
Extremadura	55.80	1.34	23.30	11.00
Galicia	56.20	1.60	25.24	-0.96
Madrid, Comunidad de	88.06	-11.62	68.99	-13.22
Murcia, Región de	61.02	3.28	35.42	3.64
Navarra, Comunidad Foral de	63.22	1.06	33.78	-6.98
País Vasco	96.01	7.99	70.85	10.64
Rioja, La	63.06	1.70	34.98	-2.04
Ceuta	68.66	-5.18	43.48	0.24
Melilla	68.94	1.39	46.40	8.34

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	88.73	1.64	63.54	0.13
HOTELS: Gold stars				
Five	197.31	-0.06	140.42	-4.03
Four	94.13	-0.03	75.58	-1.57
Three	75.00	4.16	56.88	2.61
Two	62.04	1.84	35.04	-0.28
One	58.98	-1.78	27.79	-5.20
GUESTHOUSES: Silver stars				
Three and two	60.66	12.98	27.22	12.81
One	50.93	2.50	23.53	3.05

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room