

23 August 2016

**Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
July 2016. Provisional data**

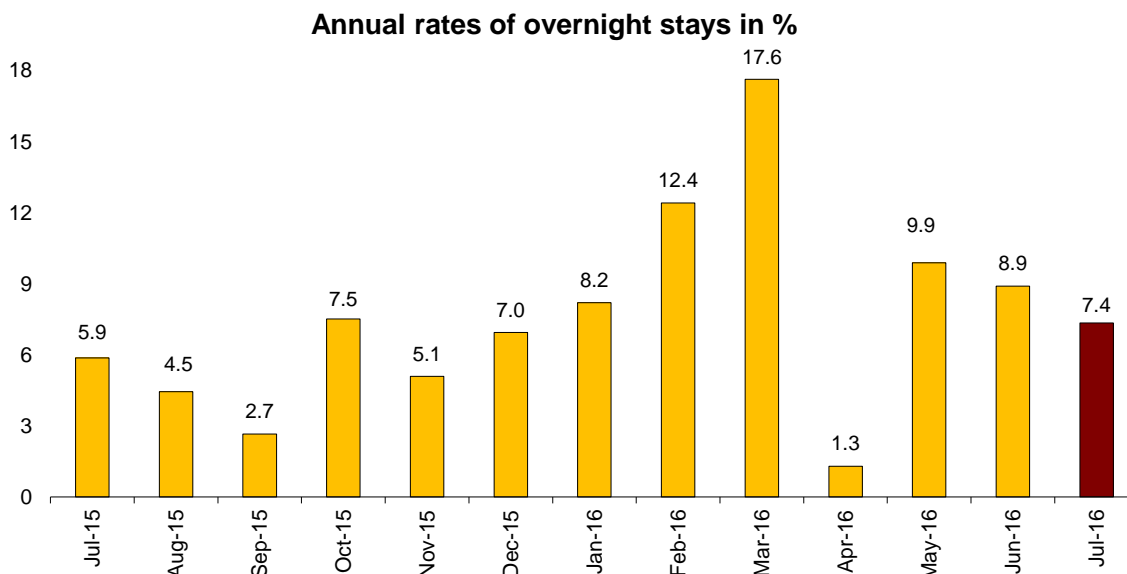
Overnight stays in hotel establishments register an increase of 7.4% in July, as compared to the same month of 2015

Hotels invoice an average of 93.2 euros per occupied room, which means an annual increase of 6.3%

In July, a total of 42.8 million overnight stays were registered in hotel establishments, 7.4% more than in the same month of 2015. Overnight stays by residents in Spain increased by 5.7% and those of non-residents increased so by 8.2%.

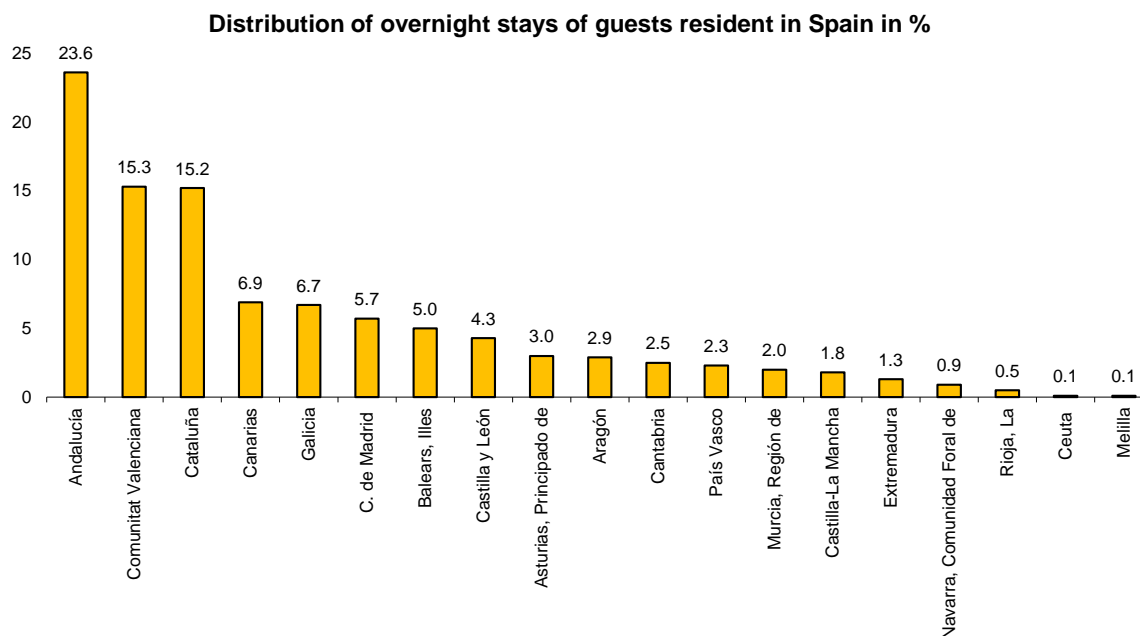
The average stay increased 1.5%, as compared to July 2015, standing at 3.7 nights per guest.

During the first seven months of 2016, overnight stays increased 8.9%, as compared to the same period of the previous year.

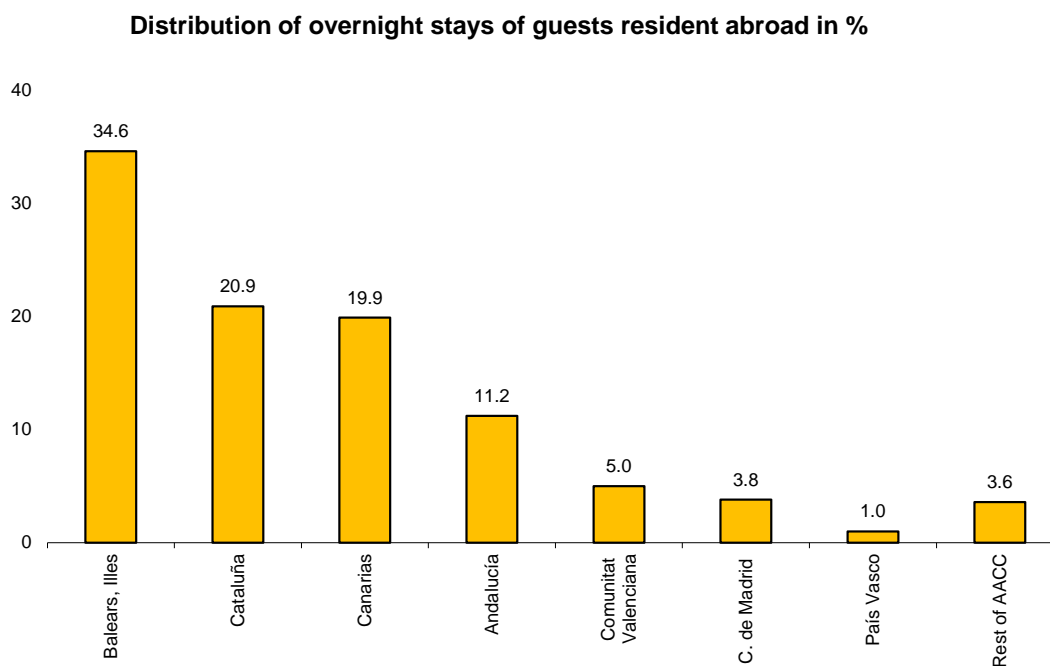


Main destinations

In July, Andalucía, Cataluña, Comunitat Valenciana, Cataluña and Canarias were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 0.4%, 7.3%, 9.1% and 1.0%, respectively.



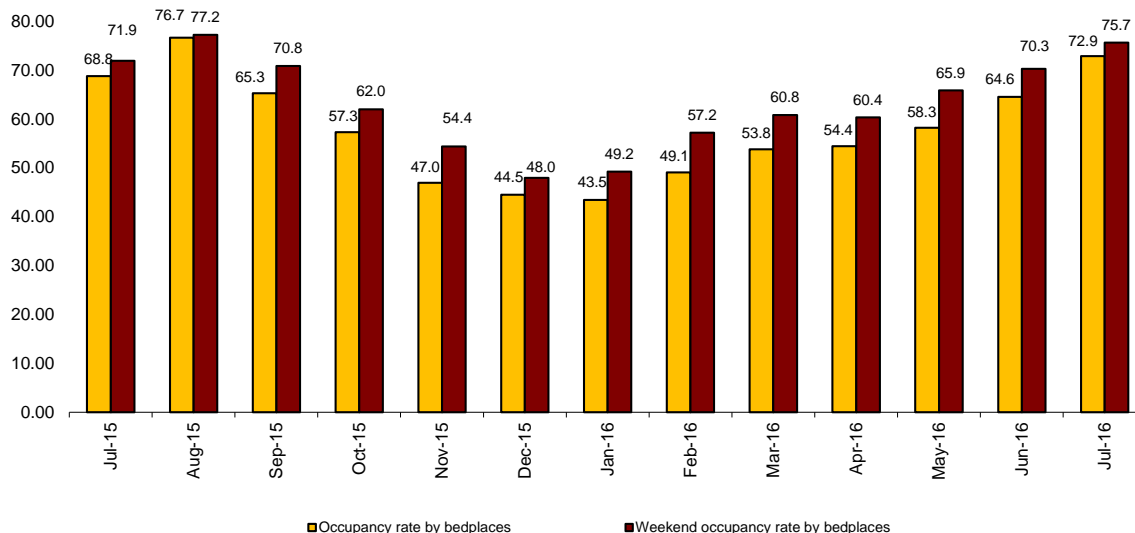
The main destination chosen by non-residents was Illes Balears, with 34.6% of the total amount of overnight stays. In this Autonomous Community, overnight stays by non-residents increased 4.0% as compared to July 2015. The following destinations of non-residents were Cataluña (20.9% of the total and an increase of 6.4% in overnight stays) and Canarias (19.9% of the total and an increase of 12.7% in overnight stays).



Hotel Occupancy

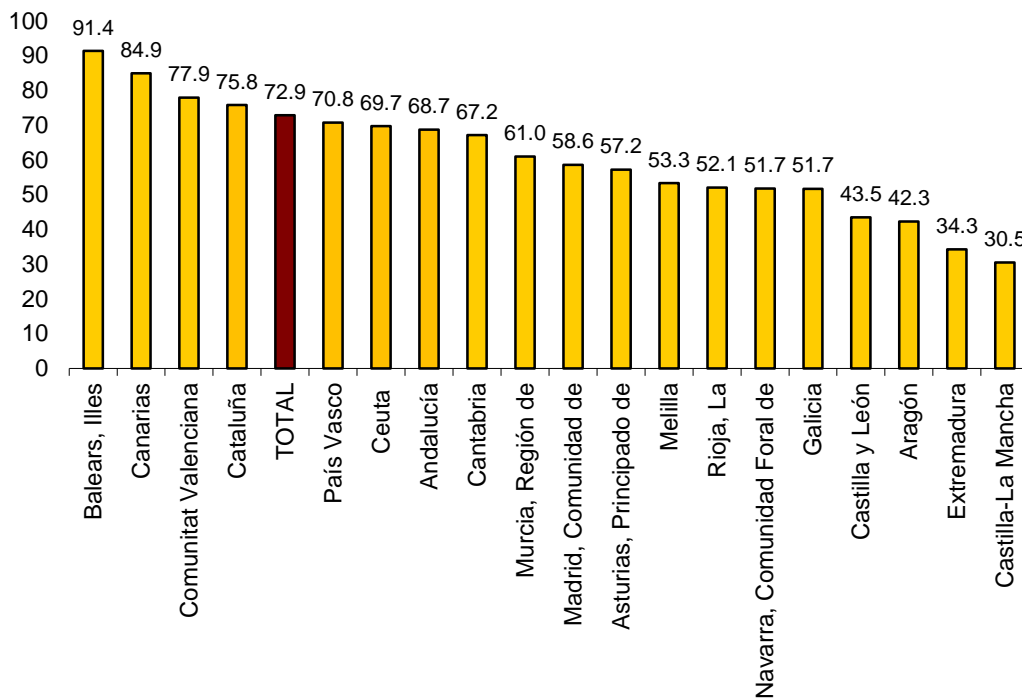
In July, 72.9% of the available bedplaces were occupied, indicating an annual increase of 6.0%. The weekend occupancy rate by bedplaces increased by 5.2%, standing at 75.7%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears registered the greatest occupancy rate by bedplaces in July (91.4%), followed by Canarias (84.9%) and Comunitat Valenciana (77.9%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the island of Mallorca registered the highest occupancy rate by bedplaces (92.1%), and Palma-Calvià the highest weekend occupancy rate (90.9%). The Costa del Sol recorded the highest number of overnight stays, with more than 2.3 million.

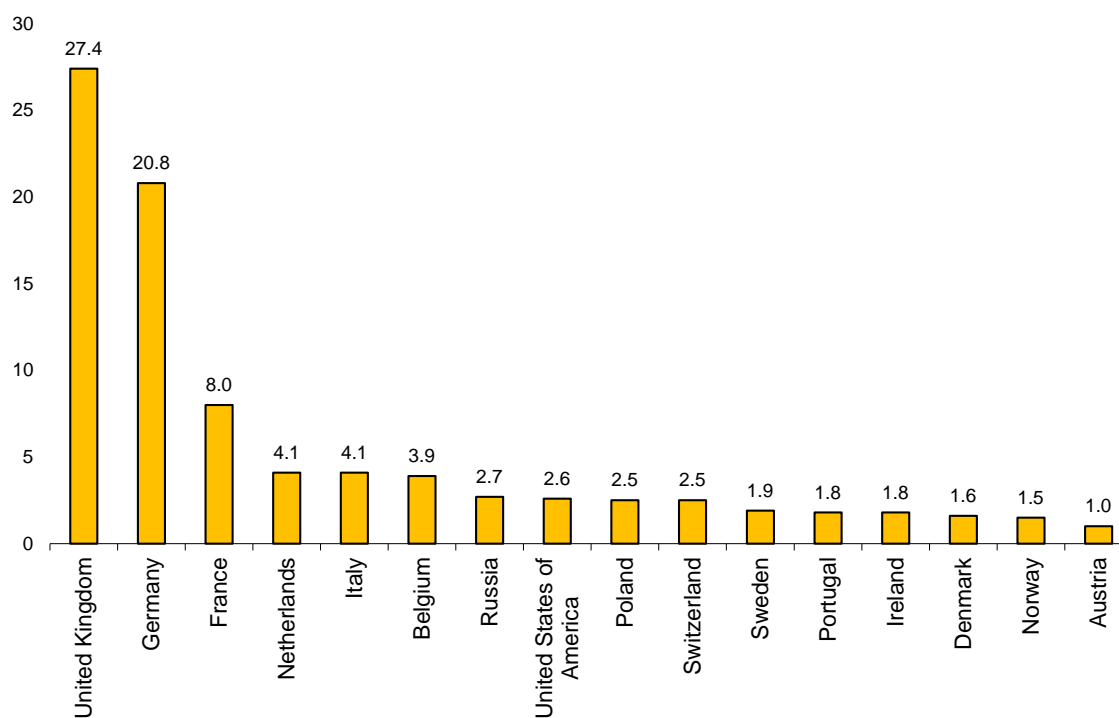
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Benidorm. Alcudia reached the highest occupancy rate by bedplaces (94.9%) and Muro the greatest weekend occupancy rate (95.4%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 27.4% and 20.8%, respectively, of the total of overnight stays in hotel establishments by non-residents in July. The British market increased by 9.6%, and the German one did so by 4.1%.

Overnight stays of guests from France, the Netherlands and Italy (the following countries of origin) registered annual rates of 8.8%, 3.8% and 3.2%, respectively.

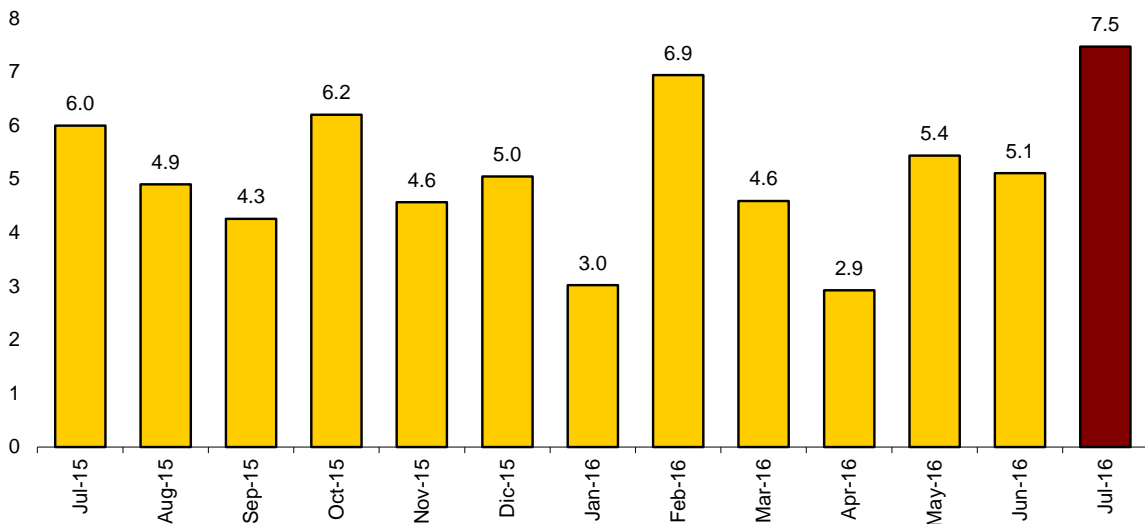
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 7.5% in July, that is, 2.4 points more than that of the previous month and 1.5 points above than 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 July (they represented 76.2% of the total). Hotel prices increased by 10.0% in the annual rate in Illes Balears, 8.9% in Andalucía, 8.0% in Canarias and 5.0% in Cataluña.

By hotel category, increase in hotel prices were registered in all of them. In four -golden-star establishments (8.5%), in three-golden-star establishments (7.6%), in one-golden-star establishments (7.5%), in four-golden-star establishments (6.2%), in three-silver-star and in two-silver-star establishments (5.0% in both cases), in one-silver-star establishments (3.9%) and in two-golden-star establishments (1.9%).

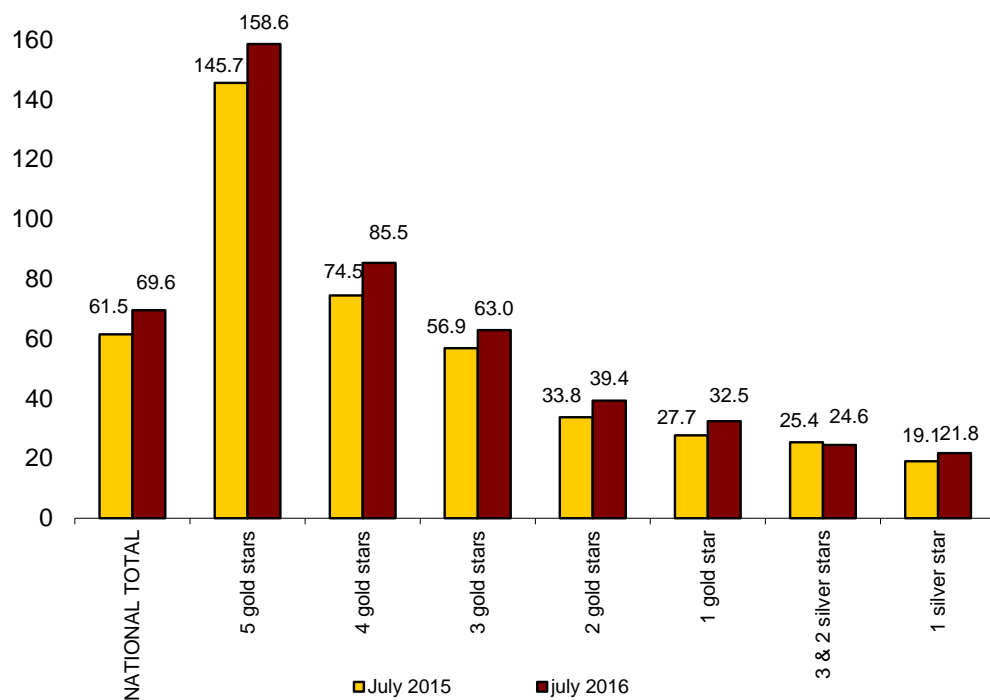
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in July was 93.2 euros, which represented an increase of 6.3% as compared to the same month of 2015.

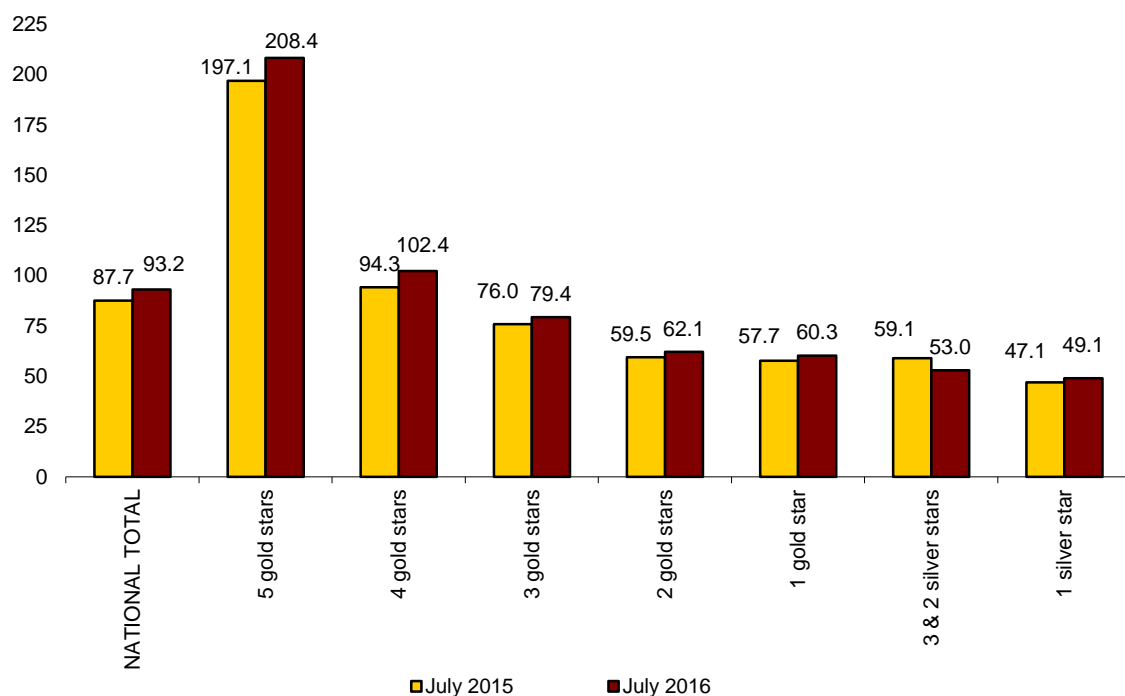
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 69.6 euros, with an increase of 13.3%.

By category, the average invoicing was 208.4 euros for five-star hotels, 102.4 euros for four-star hotels and 79.4 euros for three-star hotels. Income per available room for the same categories were 158.6, 85.5 and 63.0 euros, respectively.

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



Average daily rate (ADR) by hotel category in euros



Más información en **INEbase** – www.ine.es Todas las notas de prensa en: www.ine.es/prensa/prensa.htm

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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

July 2016

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 | 11,563,871 | 5,529,260 | 6,034,611 | 42,777,182 | 14,664,445 | 28,112,737 | 3.70 |
| HOTELS: Golden stars | | | | | | | |
| Five | 585,476 | 168,007 | 417,469 | 2,138,570 | 423,629 | 1,714,941 | 3.65 |
| Four | 5,088,820 | 2,317,589 | 2,771,232 | 20,861,082 | 6,739,668 | 14,121,414 | 4.10 |
| Three | 3,416,269 | 1,580,730 | 1,835,539 | 13,789,392 | 4,345,266 | 9,444,126 | 4.04 |
| Two | 916,719 | 543,781 | 372,939 | 2,543,405 | 1,238,987 | 1,304,419 | 2.77 |
| One | 425,282 | 264,897 | 160,385 | 956,750 | 538,288 | 418,462 | 2.25 |
| INNS: Silver stars | | | | | | | |
| Two and three | 602,342 | 377,949 | 224,392 | 1,325,973 | 765,682 | 560,291 | 2.20 |
| One | 528,962 | 276,308 | 252,655 | 1,162,010 | 612,925 | 549,084 | 2.20 |
| Annual rate | 8.92 | 6.83 | 10.91 | 7.35 | 5.72 | 8.21 | -1.45 |
| Cumulative annual rate | 7.85 | 5.14 | 10.69 | 8.87 | 4.93 | 11.10 | 0.94 |

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 | 16,796 | 858,607 | 1,785,550 | 72.89 | 75.66 | 74.60 | 259,132 |
| HOTELS: Golden stars | | | | | | | |
| Five | 290 | 43,720 | 91,041 | 72.15 | 77.09 | 75.76 | 31,677 |
| Four | 2,492 | 361,365 | 779,946 | 80.70 | 82.35 | 83.35 | 125,328 |
| Three | 3,024 | 251,491 | 528,010 | 78.85 | 80.12 | 79.56 | 67,335 |
| Two | 2,162 | 69,663 | 135,836 | 58.96 | 66.49 | 62.68 | 13,300 |
| One | 1,406 | 31,252 | 60,798 | 50.02 | 57.61 | 54.13 | 5,752 |
| INNS: Silver stars | | | | | | | |
| Two and three | 3,298 | 51,973 | 99,322 | 42.60 | 48.75 | 45.92 | 8,549 |
| One | 4,124 | 49,144 | 90,596 | 41.08 | 45.98 | 44.10 | 7,190 |
| Annual rate | -0.18 | 0.57 | 0.82 | 5.95 | 5.20 | 6.69 | 5.39 |

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 | 89,551 | 1,083,327 | 378,611 | 7,339,996 | 92.09 | 90.62 | 91.87 | 6.58 | 39,393 |
| Palma - Calvià | 55,053 | 413,612 | 219,039 | 2,568,385 | 92.01 | 90.93 | 91.95 | 5.95 | 15,182 |
| Isla de Lanzarote | 26,084 | 104,151 | 142,778 | 915,401 | 91.19 | 88.01 | 92.84 | 8.13 | 6,283 |
| Islas de Ibiza-Formentera | 47,429 | 314,683 | 192,663 | 1,616,388 | 90.00 | 90.43 | 90.39 | 5.00 | 11,237 |
| Isla de Menorca | 34,141 | 110,638 | 160,384 | 777,440 | 88.07 | 85.39 | 94.51 | 6.48 | 4,846 |
| Sur de Gran Canaria | 45,280 | 158,523 | 227,812 | 1,401,248 | 87.60 | 88.80 | 90.84 | 7.99 | 11,044 |
| Sur de Tenerife | 45,227 | 193,947 | 223,842 | 1,610,318 | 87.22 | 89.05 | 88.72 | 7.67 | 13,377 |
| Costa Blanca | 268,359 | 181,928 | 1,108,150 | 981,892 | 86.80 | 88.79 | 85.30 | 4.64 | 10,258 |

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

| | | | | | | | | | |
|-----------------------|---------|---------|---------|-----------|-------|-------|-------|------|--------|
| Costa del Sol | 209,729 | 324,176 | 705,213 | 1,685,821 | 81.42 | 82.74 | 87.25 | 4.48 | 14,259 |
| Isla de Tenerife | 90,698 | 232,981 | 415,872 | 1,892,059 | 83.69 | 85.10 | 83.61 | 7.13 | 16,717 |
| Barcelona | 152,616 | 637,959 | 299,555 | 1,818,935 | 82.83 | 85.41 | 88.95 | 2.68 | 14,167 |
| Costa Brava | 192,466 | 317,890 | 515,594 | 1,579,192 | 74.91 | 76.73 | 75.35 | 4.10 | 10,327 |
| Costa Daurada | 215,092 | 218,827 | 699,519 | 1,196,657 | 81.68 | 82.65 | 83.84 | 4.37 | 7,156 |
| Isla de Gran Canaria | 69,134 | 169,804 | 295,497 | 1,446,576 | 84.29 | 85.61 | 87.63 | 7.29 | 12,060 |
| Costa Barcelona | 186,790 | 299,208 | 400,410 | 1,183,445 | 80.55 | 79.03 | 80.99 | 3.26 | 7,438 |
| Isla de Fuerteventura | 19,664 | 131,482 | 111,981 | 1,234,343 | 85.11 | 85.73 | 88.24 | 8.91 | 8,229 |

Tourist site with a greater occupancy rate per month

| | | | | | | | | | |
|----------------------------|--------|---------|---------|-----------|-------|-------|-------|------|-------|
| Alcúdia | 3,150 | 87,893 | 18,708 | 656,752 | 94.87 | 94.31 | 94.00 | 7.42 | 3,172 |
| Capdepera | 4,109 | 71,866 | 11,032 | 512,539 | 94.81 | 93.17 | 94.74 | 6.89 | 2,371 |
| Tías | 6,339 | 33,079 | 38,332 | 289,480 | 94.57 | 94.66 | 92.24 | 8.32 | 1,674 |
| Sant Llorenç Des Cardassar | 3,136 | 96,467 | 19,301 | 754,714 | 94.15 | 92.89 | 92.57 | 7.77 | 3,310 |
| Santa Margalida | 1,464 | 50,473 | 5,155 | 404,968 | 94.03 | 90.74 | 91.84 | 7.90 | 1,859 |
| Calvià | 11,760 | 203,899 | 54,377 | 1,396,720 | 92.75 | 90.89 | 91.96 | 6.73 | 7,854 |
| Muro | 5,418 | 69,535 | 20,207 | 497,908 | 92.33 | 95.36 | 91.26 | 6.91 | 2,739 |
| Sant Josep De Sa Talaia | 8,173 | 93,932 | 36,109 | 465,398 | 92.06 | 89.57 | 91.94 | 4.91 | 3,411 |
| Yaiza | 11,666 | 46,487 | 63,631 | 399,232 | 91.45 | 84.10 | 94.68 | 7.96 | 3,106 |
| Palma | 40,517 | 200,598 | 151,427 | 1,092,609 | 91.14 | 90.99 | 92.22 | 5.16 | 6,642 |

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

| | | | | | | | | | |
|---------------------------|---------|---------|---------|-----------|-------|-------|-------|------|--------|
| Barcelona | 137,602 | 611,047 | 268,394 | 1,748,378 | 83.52 | 85.80 | 89.38 | 2.69 | 13,537 |
| Madrid | 344,649 | 415,695 | 570,515 | 951,510 | 61.34 | 64.78 | 68.62 | 2.00 | 11,069 |
| Benidorm | 126,450 | 100,209 | 630,239 | 692,265 | 90.51 | 90.44 | 88.28 | 5.83 | 5,902 |
| San Bartolomé De Tirajana | 34,648 | 116,133 | 182,491 | 1,016,752 | 88.28 | 89.73 | 91.17 | 7.95 | 8,653 |
| Salou | 76,433 | 125,176 | 275,697 | 839,519 | 86.95 | 86.05 | 88.34 | 5.53 | 3,580 |
| Adeje | 19,966 | 98,165 | 107,764 | 851,489 | 87.96 | 89.42 | 91.03 | 8.12 | 7,272 |
| Lloret De Mar | 33,683 | 134,670 | 115,536 | 821,278 | 82.95 | 79.60 | 82.22 | 5.56 | 3,351 |
| Pájara | 11,786 | 85,471 | 65,050 | 804,180 | 88.31 | 88.90 | 88.64 | 8.94 | 5,321 |
| Torremolinos | 48,662 | 63,234 | 192,223 | 410,108 | 88.26 | 87.51 | 89.85 | 5.38 | 2,917 |
| Arona | 13,324 | 59,065 | 61,683 | 490,003 | 89.10 | 89.52 | 86.58 | 7.62 | 3,260 |

* 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 | 11,563,871 | 100.00 | 42,777,182 | 100.00 |
| Residents in Spain | 5,529,260 | 47.81 | 14,664,445 | 34.28 |
| Residents abroad | 6,034,611 | 52.19 | 28,112,737 | 65.72 |
| Total Residents abroad | 6,034,611 | 100.00 | 28,112,737 | 100.00 |
| Total Residents in E.U. (without Spain) | 4,442,437 | 73.62 | 23,054,677 | 82.01 |
| - Germany | 875,807 | 14.51 | 5,842,996 | 20.78 |
| - Austria | 55,536 | 0.92 | 275,004 | 0.98 |
| - Belgium | 222,680 | 3.69 | 1,104,170 | 3.93 |
| - Denmark | 90,840 | 1.51 | 439,168 | 1.56 |
| - Finland | 28,658 | 0.47 | 104,363 | 0.37 |
| - France | 679,545 | 11.26 | 2,242,012 | 7.98 |
| - Greece | 13,423 | 0.22 | 38,907 | 0.14 |
| - Ireland | 91,811 | 1.52 | 492,657 | 1.75 |
| - Italy | 311,098 | 5.16 | 1,149,697 | 4.09 |
| - Luxembourg | 13,997 | 0.23 | 69,508 | 0.25 |
| - Netherlands | 242,826 | 4.02 | 1,163,743 | 4.14 |
| - Poland | 110,321 | 1.83 | 691,109 | 2.46 |
| - Portugal | 152,969 | 2.53 | 513,506 | 1.83 |
| - United Kingdom | 1,289,076 | 21.36 | 7,694,789 | 27.37 |
| - Czech Republic | 40,545 | 0.67 | 238,342 | 0.85 |
| - Sweden | 111,841 | 1.85 | 540,874 | 1.92 |
| - Other EU countries* | 111,463 | 1.85 | 453,831 | 1.61 |
| Norway | 82,534 | 1.37 | 407,250 | 1.45 |
| Russia | 118,863 | 1.97 | 766,636 | 2.73 |
| Switzerland | 134,276 | 2.23 | 687,389 | 2.45 |
| Rest of Europe | 111,613 | 1.85 | 433,094 | 1.54 |
| Japan | 38,429 | 0.64 | 71,380 | 0.25 |
| United States of America | 301,594 | 5.00 | 715,753 | 2.55 |
| Rest of America | 324,465 | 5.38 | 788,765 | 2.81 |
| Africa | 80,423 | 1.33 | 221,427 | 0.79 |
| Other countries | 399,976 | 6.63 | 966,365 | 3.44 |

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

Hotel Price Index (HPI). 2008 Base

July 2016

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

| | Index | Annual growth rate |
|-----------------------------|--------------|--------------------|
| TOTAL | 110.1 | 7.5 |
| Andalucía | 105.2 | 8.9 |
| Aragón | 60.5 | 1.1 |
| Asturias, Principado de | 93.9 | 5.6 |
| Balears, Illes | 131.6 | 10.0 |
| Canarias | 115.7 | 8.0 |
| Cantabria | 95.9 | 7.5 |
| Castilla y León | 91.4 | 3.2 |
| Castilla - La Mancha | 86.9 | 2.6 |
| Cataluña | 108.4 | 5.0 |
| Comunitat Valenciana | 108.6 | 10.1 |
| Extremadura | 92.9 | 3.0 |
| Galicia | 96.0 | 5.0 |
| Madrid, Comunidad de | 81.3 | 1.6 |
| Murcia, Región de | 83.5 | 5.7 |
| Navarra, Comunidad Foral de | 86.4 | -3.5 |
| País Vasco | 110.0 | 6.9 |
| Rioja, La | 86.0 | -2.2 |
| Ceuta | 101.5 | -9.0 |
| Melilla | 98.3 | 0.0 |

National General Index and breakdown by categories

| | Index | Annual growth rate |
|------------------------------|--------------|--------------------|
| TOTAL | 110.1 | 7.5 |
| HOTELS: Gold stars | | |
| Five | 103.7 | 6.2 |
| Fourth | 107.6 | 8.5 |
| Three | 115.4 | 7.6 |
| Two | 106.2 | 1.9 |
| One | 117.0 | 7.5 |
| HOSTALS: Silver stars | | |
| Three and two | 111.0 | 5.0 |
| One | 107.0 | 3.9 |

Indicators on the Profitability of the Hotel Sector

July 2016

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 | 93.2 | 6.3 | 69.6 | 13.3 |
| Andalucía | 102.3 | 9.7 | 73.9 | 17.7 |
| Aragón | 54.5 | 2.2 | 24.1 | 20.4 |
| Asturias, Principado de | 65.3 | 6.7 | 39.9 | 11.0 |
| Balears, Illes | 109.9 | 8.3 | 101.6 | 13.8 |
| Canarias | 88.1 | 4.5 | 76.7 | 13.8 |
| Cantabria | 77.7 | 5.7 | 52.4 | 13.0 |
| Castilla y León | 54.5 | 0.4 | 24.5 | 8.8 |
| Castilla - La Mancha | 52.5 | 0.4 | 17.9 | 16.4 |
| Cataluña | 96.5 | 4.8 | 75.3 | 9.9 |
| Comunitat Valenciana | 90.9 | 10.9 | 69.9 | 16.8 |
| Extremadura | 56.0 | 1.5 | 20.8 | 16.0 |
| Galicia | 59.1 | -0.1 | 31.7 | 8.3 |
| Madrid, Comunidad de | 76.5 | 2.1 | 50.6 | 6.4 |
| Murcia, Región de | 74.2 | 5.1 | 44.5 | 14.7 |
| Navarra, Comunidad Foral de | 88.0 | -7.4 | 48.0 | 5.4 |
| País Vasco | 89.3 | 0.0 | 70.0 | 4.0 |
| Rioja, La | 60.1 | -2.1 | 33.0 | 6.2 |
| Ceuta | 71.9 | -0.5 | 50.9 | 30.9 |
| Melilla | 67.2 | 4.3 | 47.2 | 37.9 |

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

| | ADR (in euros) | Annual growth rate | RevPar (in euros) | Annual growth rate |
|----------------------------------|-------------------|-----------------------|----------------------|-----------------------|
| TOTAL | 93.2 | 6.3 | 69.6 | 13.3 |
| HOTELS: Gold stars | | | | |
| Five | 208.4 | 5.8 | 158.6 | 8.9 |
| Four | 102.4 | 8.6 | 85.5 | 14.7 |
| Three | 79.4 | 4.5 | 63.0 | 10.6 |
| Two | 62.1 | 4.4 | 39.4 | 16.4 |
| One | 60.3 | 4.5 | 32.5 | 17.3 |
| GUESTHOUSES: Silver stars | | | | |
| Three and two | 53.0 | -10.3 | 24.6 | -3.3 |
| One | 49.1 | 4.3 | 21.8 | 14.6 |

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room