

23 September 2014

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

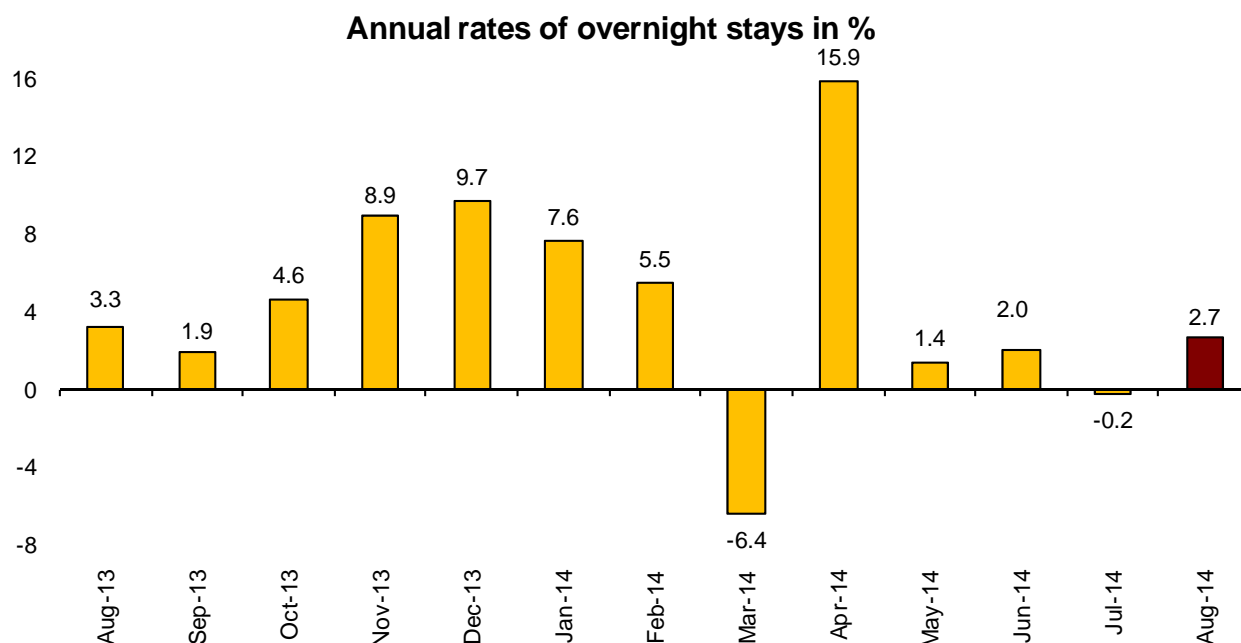
Overnight stays in hotel establishments registered an increase of 2.7% in August, as compared to the same month of 2013

Hotels earn 66.7 euros per available room and invoice an average of 89.1 euros per occupied room

In August, a total of 43.0 million overnight stays were registered in hotel establishments, indicating an increase of 2.7% as compared with the same month of 2013. Overnight stays for residents in Spain increased 3.6% while those of non-residents did so by 2.2%.

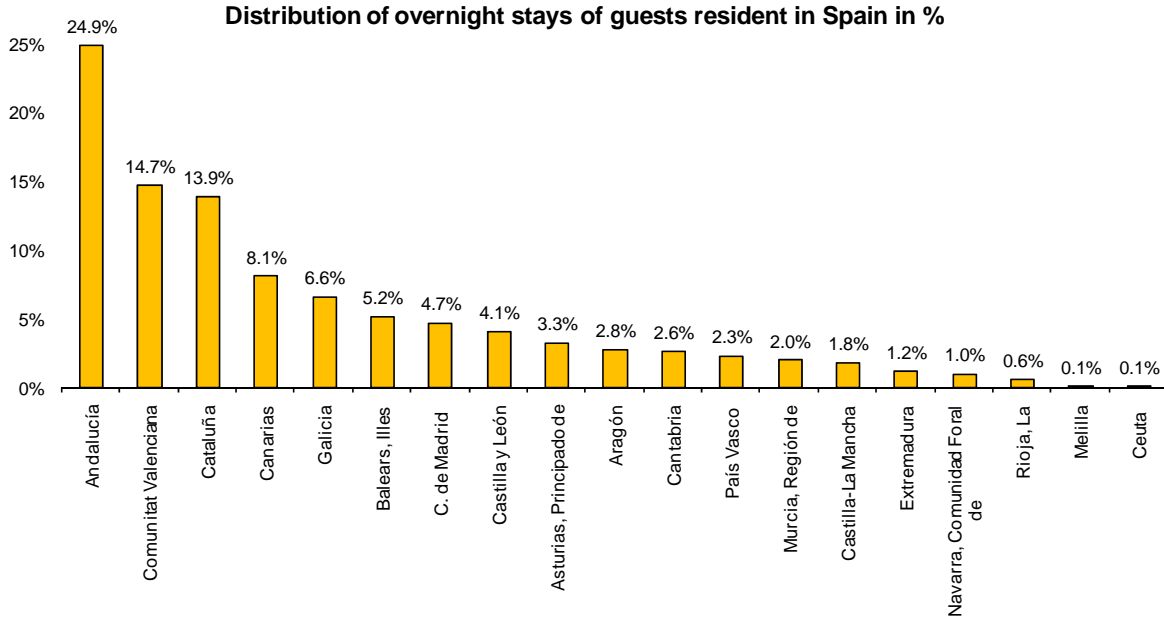
The average stay decreased 2.2%, as compared with August 2013, standing at 3.8 nights per guest.

In the first eight months of 2014, overnight stays increased 2.8% as compared with the same period of the previous year.

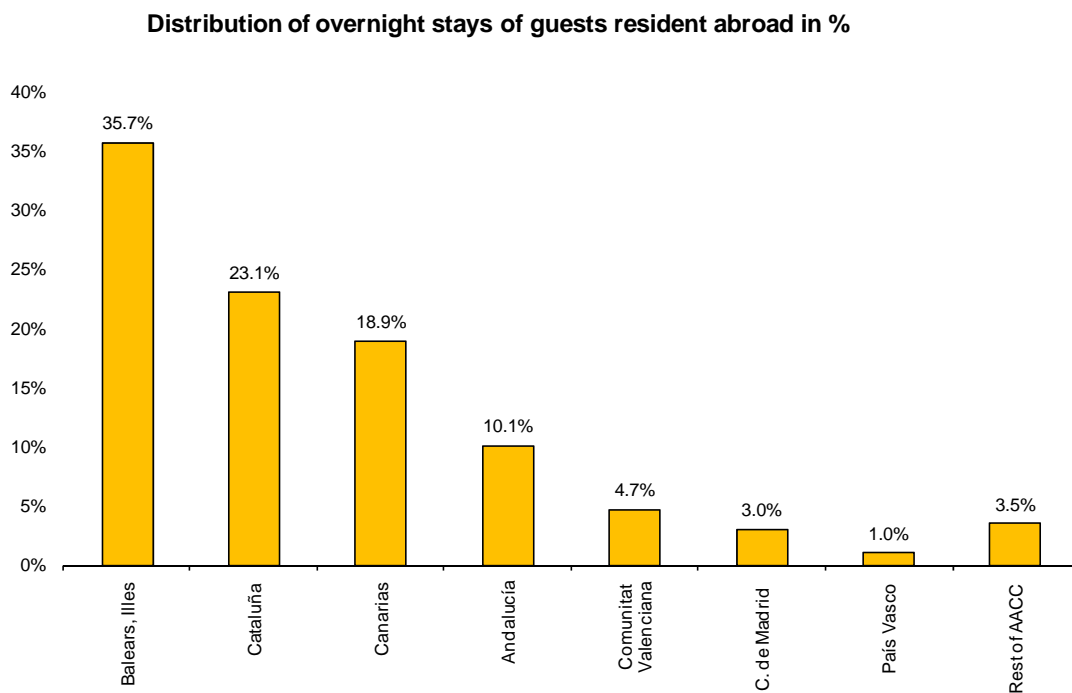


Main destinations

In August, Andalucía, Comunitat Valenciana, Cataluña and Canarias were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 3.1%, 1.0%, 7.1% and 1.9%, respectively.



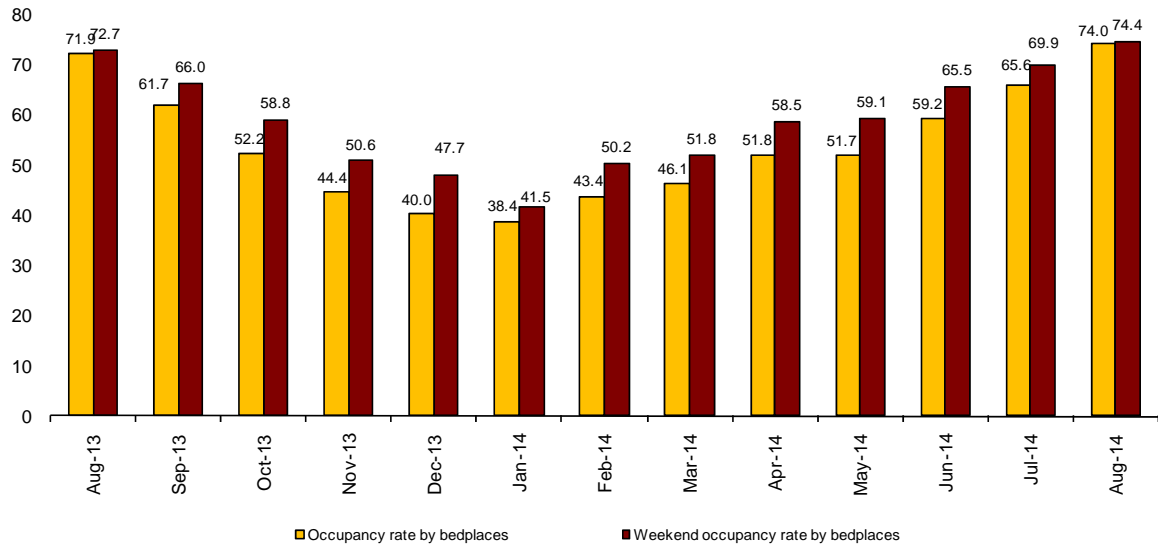
The main destination chosen by non-residents was Illes Balears, with 35.7% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 2.7%, as compared with August 2013. Illes Balears was followed by Cataluña (23.1% of the total) and Canarias (18.9%). The overnight stays of non-residents in these Autonomous Communities decreased by 0.2% and increased by 10.7%, respectively.



Hotel Occupancy

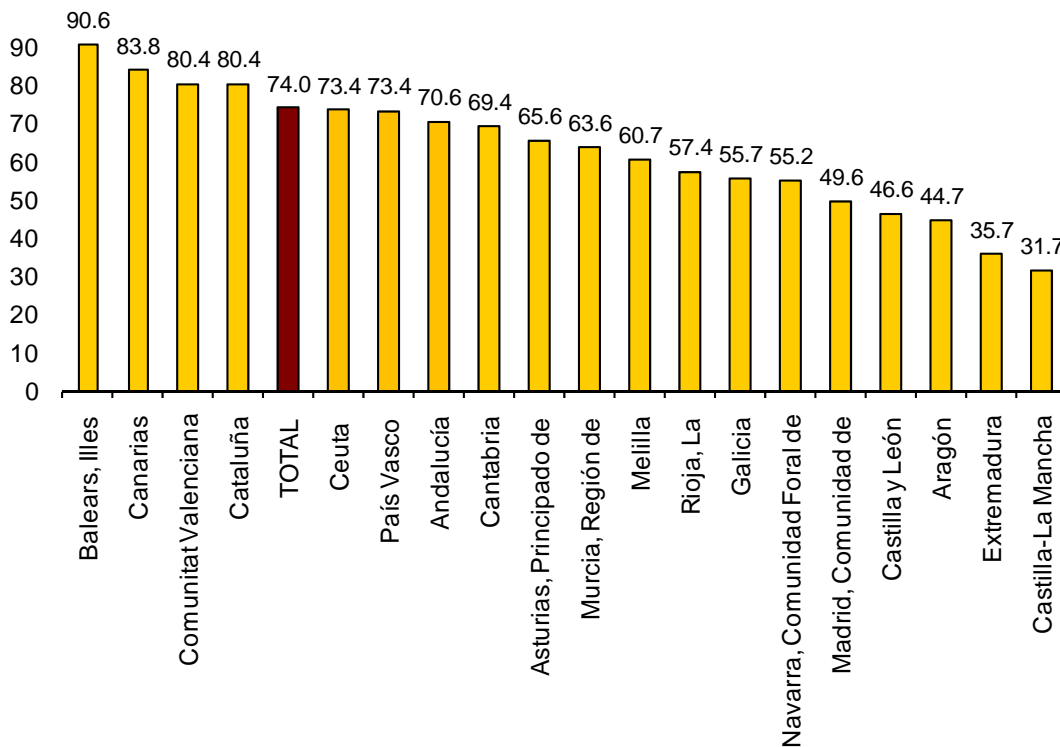
In August, 74.0% of the available bedplaces were occupied, indicating an annual increase of 2.8%. The weekend occupancy rate by bedplaces increased by 2.3%, standing at 74.4%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears registered the greatest occupancy rate by bedplaces in August (90.6%), followed by Canarias (83.8%) and Comunitat Valenciana and Cataluña (both at 80.4%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the island of Lanzarote registered in August the highest occupancy rate by bedplaces (91.8%). The island of Mallorca recorded the highest weekend occupancy rate (91.3%) and also the highest number of overnight stays, with more than 7.6 million.

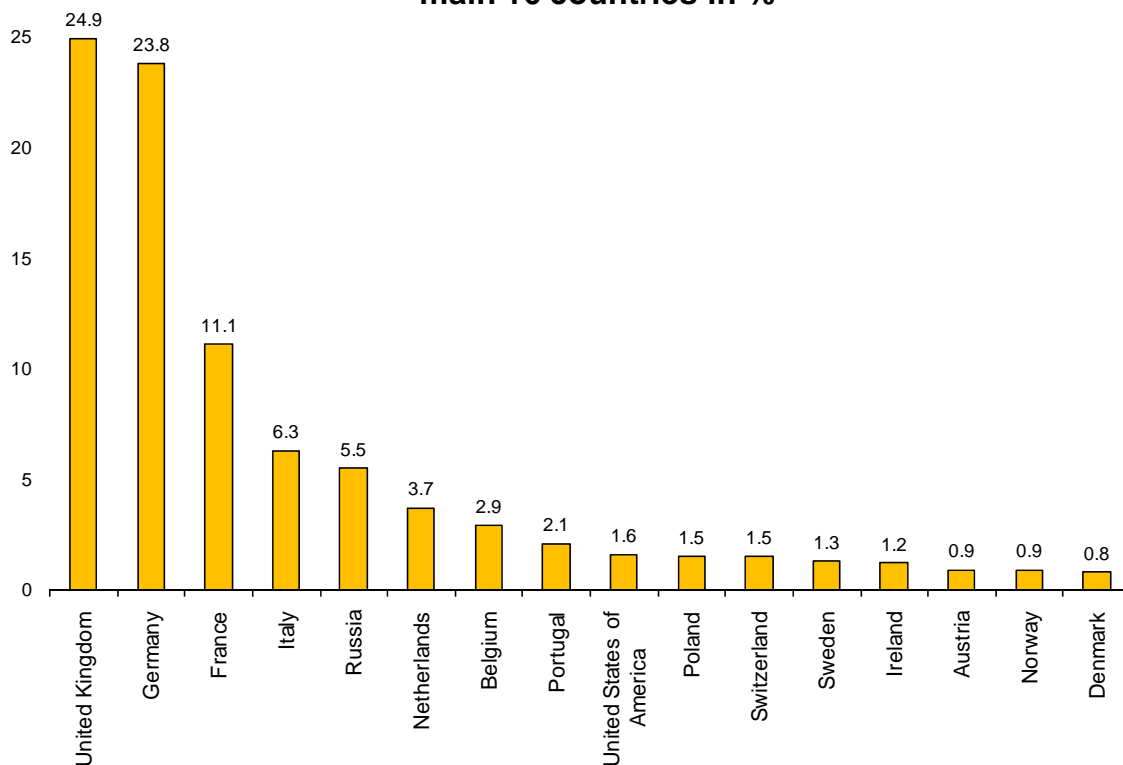
The tourist sites with the highest number of overnight stays were Barcelona, Calvià and Benidorm. Sant Josep de Sa Talaia reached the highest occupancy rate by bedplaces (97.0%) and Santa Margalida the highest weekend occupancy rate (97.2%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 24.9% and 23.8%, respectively, of the total of overnight stays in hotel establishments by non-residents in August. The British market experienced a decrease of 1.3% and the German market increased by 3.8%.

Overnight stays of guests from France, Italy and Russia (the following countries of origin) registered annual rates of 10.2%, 6.7% and -17.0%, respectively.

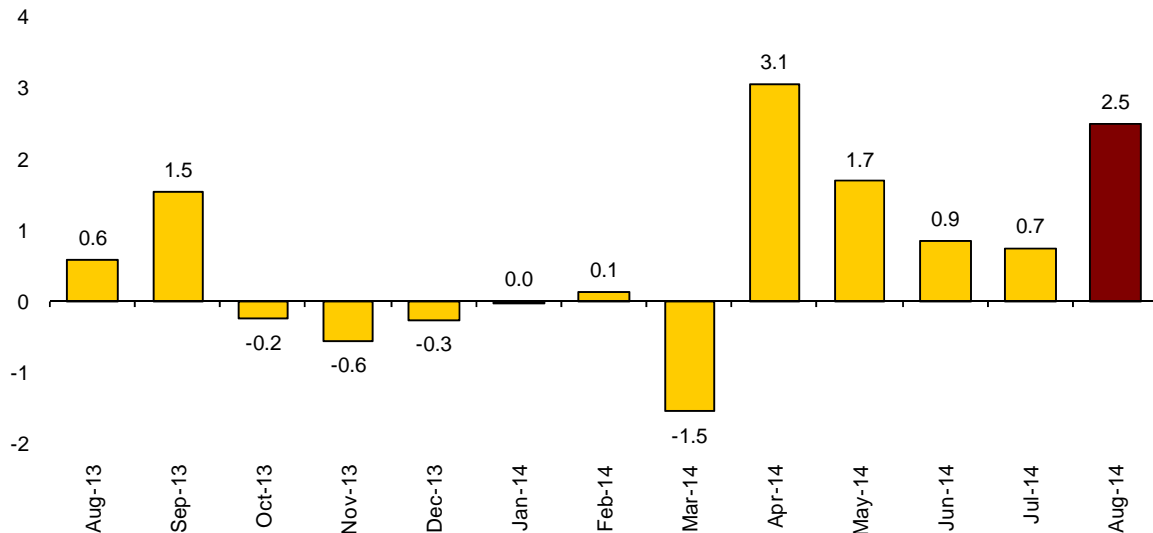
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 2.5% in August, that is, 1.8 points higher than that of the previous month and the 1.9 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 August (they represented 76.9% of the total). Hotel prices increased 4.6% in the annual rate in Andalucía, 4.1% in Canarias, 3.8% in Cataluña and 0.7% in Illes Balears.

By hotel category, the increases in hotel prices were registered in five-golden-star establishments (4.8%), one-golden-star hotels (3.4%), three and two-silver-star hotels (3.2%), four-golden-star establishments (2.5%), three-golden-star hotels (2.1%) and two-golden-star hotels (2.0%).

In turn, the prices registered a decrease in one-silver-star establishments (1.8%).

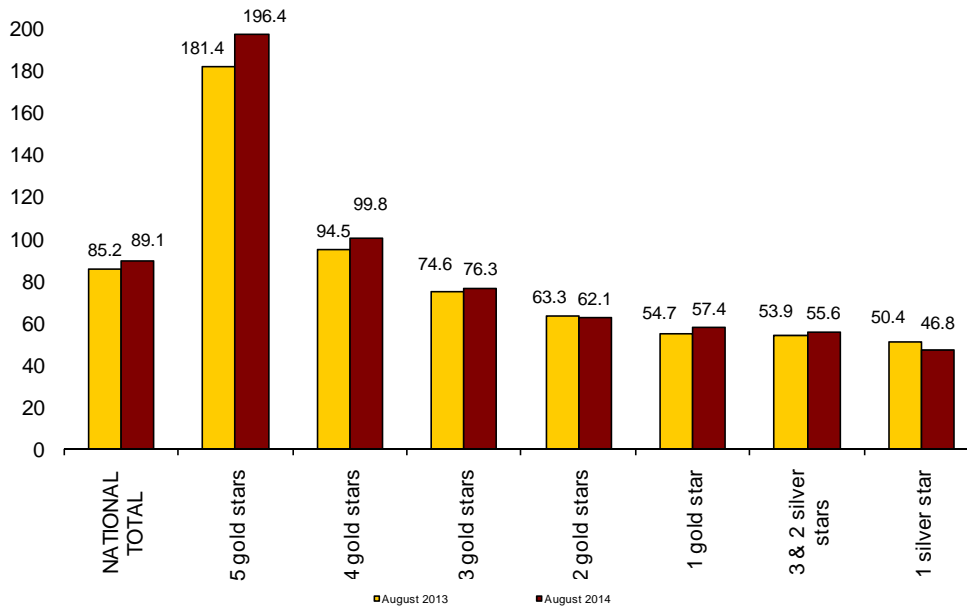
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in August was 89.1 euros, which represented an increase of 4.7% as compared with the same month of 2013.

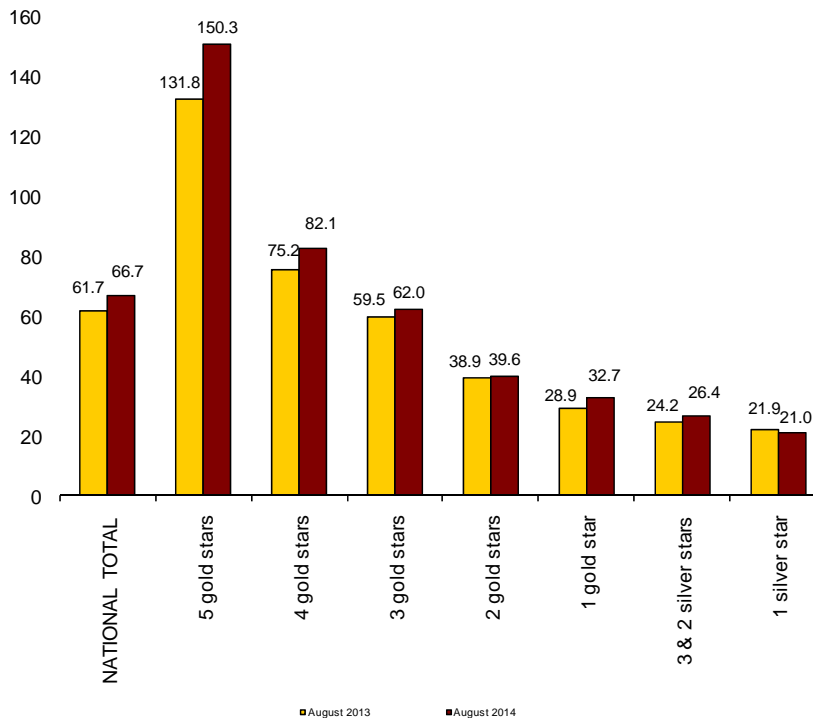
In turn, the daily average revenue per available room (RevPAR), that is conditioned by the occupancy registered in hotel establishments, reached 66.7 euros, with an increase of 8.2%.

By category, the average invoicing was 196.4 euros for five-star hotels, 99.8 euros for four-star hotels and 76.3 euros for three-star hotels. Income per available room for the same categories was 150.3, 82.1 and 62.0 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)

August 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	11,249,852	5,686,086	5,563,767	43,038,904	16,443,828	26,595,076	3.83
HOTELS: Golden stars							
Five	491,026	172,540	318,485	2,026,171	556,848	1,469,323	4.13
Four	4,796,807	2,366,726	2,430,081	19,898,265	7,555,602	12,342,663	4.15
Three	3,489,578	1,662,818	1,826,760	14,638,260	4,885,739	9,752,521	4.19
Two	956,818	560,939	395,879	2,715,051	1,376,292	1,338,759	2.84
One	389,216	242,226	146,989	1,012,124	557,570	454,554	2.60
INNS: Silver stars							
Two and three	621,817	395,514	226,303	1,519,127	842,684	676,444	2.44
One	504,591	285,321	219,269	1,229,906	669,094	560,812	2.44
Annual rate	4.98	4.78	5.19	2.72	3.57	2.19	-2.16
Cumulative annual rate	4.30	4.37	4.22	2.76	3.16	2.53	-1.48

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	16,715	1,762,620	73.97	74.40	74.72	241,738
HOTELS: Golden stars						
Five	269	83,377	74.32	75.36	77.10	27,530
Four	2,359	739,160	80.81	80.53	82.29	113,816
Three	3,047	545,927	80.58	80.49	81.23	65,297
Two	2,178	138,210	61.76	64.91	63.14	13,385
One	1,393	58,964	53.83	55.25	56.32	5,605
INNS: Silver stars						
Two and three	3,339	104,470	46.18	49.40	47.47	8,931
One	4,130	92,513	42.39	43.32	44.33	7,173
Annual rate	-0.41	0.31	2.82	2.32	3.34	1.23

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 Lanzarote	45,668	88,340	278,832	781,070	91.84	86.68	94.25	7.91	5,584
Isla de Mallorca	90,537	1,039,438	426,273	7,271,579	91.38	91.25	92.55	6.81	35,969
Palma - Calvià	46,783	426,189	200,609	2,662,911	91.06	89.64	91.46	6.05	13,886
Isla de Fuerteventura	29,796	114,953	187,604	1,124,882	90.64	90.95	90.80	9.07	7,534
Isla de Menorca	38,798	86,703	220,316	671,851	89.41	86.60	93.82	7.11	4,033
Costa Blanca	292,568	158,291	1,256,893	828,286	89.39	87.23	86.07	4.62	9,751
Costa de Gipuzkoa	37,337	38,648	95,624	88,110	87.96	90.65	90.26	2.42	1,209
Islas de Ibiza-Formentera	48,121	254,505	202,967	1,550,779	87.90	89.36	91.85	5.80	9,036

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

Costa del Sol	289,528	257,307	1,115,742	1,368,285	84.18	83.77	87.85	4.54	13,633
Isla de Tenerife	100,173	215,578	453,982	1,858,467	81.75	81.85	80.55	7.32	15,931
Costa Brava	187,546	334,790	588,911	1,677,901	82.34	81.96	83.96	4.34	9,714
Barcelona	106,678	596,346	227,196	1,837,696	83.71	84.21	89.19	2.94	13,118
Costa Daurada	191,770	216,051	687,027	1,220,274	86.57	82.00	87.26	4.68	7,056
Sur de Tenerife	58,413	178,162	267,866	1,594,447	85.39	85.65	85.77	7.87	12,831
Isla de Gran Canaria	76,000	140,364	351,177	1,201,999	79.97	78.03	81.39	7.18	10,447
Sur de Gran Canaria	57,593	129,604	293,451	1,152,564	83.67	81.27	84.97	7.72	9,538

Tourist site with a greater occupancy rate per month

Sant Josep de Sa Talaia	7,858	56,594	39,504	380,715	96.97	87.81	94.03	6.52	2,379
Teguise	8,907	17,537	63,697	171,992	96.35	82.19	91.77	8.91	1,224
Alcúdia	4,736	74,403	34,594	577,251	95.67	95.63	94.58	7.73	2,674
Eivissa	13,600	55,381	48,922	263,851	95.57	92.88	94.29	4.53	2,228
Benidorm	148,820	90,531	739,874	591,555	95.02	89.93	89.34	5.56	5,769
Capdepera	5,546	86,397	14,711	530,780	94.90	95.71	95.69	5.93	2,159
Santa Susanna	12,016	51,878	45,866	289,587	94.83	89.71	93.86	5.25	1,165
Santa Margalida	1,431	54,993	6,917	448,796	94.65	97.22	96.94	8.08	1,918
Sant Llorenç des Cardassar	3,177	78,455	17,001	693,514	94.38	93.33	95.54	8.70	3,055
Palma	30,941	205,736	133,732	1,096,461	93.90	92.83	93.47	5.20	6,331

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

Barcelona	94,742	568,152	201,031	1,749,396	84.15	84.38	89.51	2.94	12,695
Calvià	14,639	206,416	63,660	1,480,077	89.20	87.42	90.03	6.98	7,053
Madrid	306,970	333,995	517,247	726,618	51.74	53.20	54.81	1.94	10,604
Salou	71,651	111,997	281,164	818,913	91.52	86.09	90.65	5.99	3,735
San Bartolomé de Tirajana	45,568	98,090	232,244	852,939	83.37	81.95	85.71	7.55	7,488
Lloret de Mar	32,513	145,097	122,023	905,907	89.15	88.22	90.74	5.79	3,094
Adeje	25,873	94,730	130,165	881,685	87.86	87.38	87.27	8.39	6,954
Pájara	16,754	76,240	114,943	725,237	92.27	94.43	92.09	9.03	4,799
Torremolinos	64,242	49,014	307,955	348,442	88.70	89.81	88.25	5.80	2,881
Arona	15,810	57,969	78,575	469,100	87.27	85.91	85.85	7.42	3,103

* 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	11,249,852	100.00	43,038,904	100.00
Residents in Spain	5,686,086	50.54	16,443,828	38.21
Residents abroad	5,563,767	49.46	26,595,076	61.79
Total Residents abroad	5,563,767	100.00	26,595,076	100.00
Total Residents in E.U. (without Spain)	4,280,490	76.94	22,056,710	82.94
- Germany	939,581	16.89	6,315,204	23.75
- Austria	45,203	0.81	229,955	0.86
- Belgium	153,787	2.76	775,848	2.92
- Denmark	39,506	0.71	201,680	0.76
- Finland	27,458	0.49	105,158	0.40
- France	880,178	15.82	2,948,112	11.09
- Greece	11,392	0.20	30,036	0.11
- Ireland	70,546	1.27	331,031	1.24
- Italy	436,665	7.85	1,665,387	6.26
- Luxembourg	13,760	0.25	68,753	0.26
- Netherlands	187,517	3.37	985,171	3.70
- Poland	65,329	1.17	386,357	1.45
- Portugal	179,281	3.22	545,367	2.05
- United Kingdom	1,046,200	18.80	6,616,749	24.88
- Czech Republic	25,316	0.46	145,200	0.55
- Sweden	65,160	1.17	337,492	1.27
- Other EU countries*	93,610	1.68	369,209	1.39
Norway	41,518	0.75	226,927	0.85
Russia	214,762	3.86	1,464,229	5.51
Switzerland	77,373	1.39	385,294	1.45
Rest of Europe	91,662	1.65	366,618	1.38
Japan	57,682	1.04	105,244	0.40
United States of America	182,054	3.27	431,370	1.62
Rest of America	220,652	3.97	523,252	1.97
Africa	85,816	1.54	249,563	0.94
Other countries	311,758	5.60	785,870	2.95

*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 2014

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	99.6	2.5
Andalucía	93.1	4.6
Aragón	61.9	0.7
Asturias, Principado de	87.3	0.0
Balears, Illes	113.1	0.7
Canarias	104.2	4.1
Cantabria	86.0	-0.2
Castilla y León	86.3	0.2
Castilla - La Mancha	82.5	-1.1
Cataluña	104.1	3.8
Comunitat Valenciana	94.9	4.2
Extremadura	88.1	1.4
Galicia	87.4	-1.9
Madrid, Comunidad de	77.8	-1.3
Murcia, Región de	80.9	-0.5
Navarra, Comunidad Foral de	85.9	-0.4
País Vasco	101.0	2.8
Rioja, La	88.5	3.4
Ceuta	106.2	-0.4
Melilla	95.3	3.1

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	99.6	2.5
HOTELS: Gold stars		
Five	94.7	4.8
Fourth	97.4	2.5
Three	103.5	2.1
Two	100.9	2.0
One	103.7	3.4
HOSTALS: Silver stars		
Three and two	99.0	3.2
One	98.4	-1.8

Indicators on the Profitability of the Hotel Sector

August 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	89.1	4.7	66.7	8.2
Andalucía	103.2	6.7	75.6	11.4
Aragón	57.8	3.4	26.1	14.6
Asturias, Principado de	70.5	-1.2	47.6	0.7
Balears, Illes	99.5	4.5	92.3	4.6
Canarias	83.1	3.6	69.7	8.7
Cantabria	79.7	2.2	55.2	1.2
Castilla y León	54.4	0.9	26.1	11.2
Castilla - La Mancha	55.2	2.5	18.2	16.1
Cataluña	94.4	7.5	77.8	9.7
Comunitat Valenciana	86.6	6.2	67.9	8.5
Extremadura	55.0	3.9	19.5	7.0
Galicia	61.3	0.6	34.5	2.6
Madrid, Comunidad de	64.9	-0.8	33.9	14.5
Murcia, Región de	77.9	-1.9	44.4	2.9
Navarra, Comunidad Foral de	59.3	-3.3	33.8	6.1
País Vasco	89.9	4.3	69.1	5.5
Rioja, La	60.4	4.3	36.4	15.8
Ceuta	78.2	2.0	56.9	8.8
Melilla	66.0	0.2	47.5	2.8

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	89.1	4.7	66.7	8.2
HOTELS: Gold stars				
Five	196.4	8.3	150.3	14.0
Four	99.8	5.7	82.1	9.2
Three	76.3	2.3	62.0	4.1
Two	62.1	-2.0	39.6	1.7
One	57.4	5.1	32.7	13.4
GUESTHOUSES: Silver stars				
Three and two	55.6	3.0	26.4	8.7
One	46.8	-7.1	21.0	-4.4

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room