

24 October 2016

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

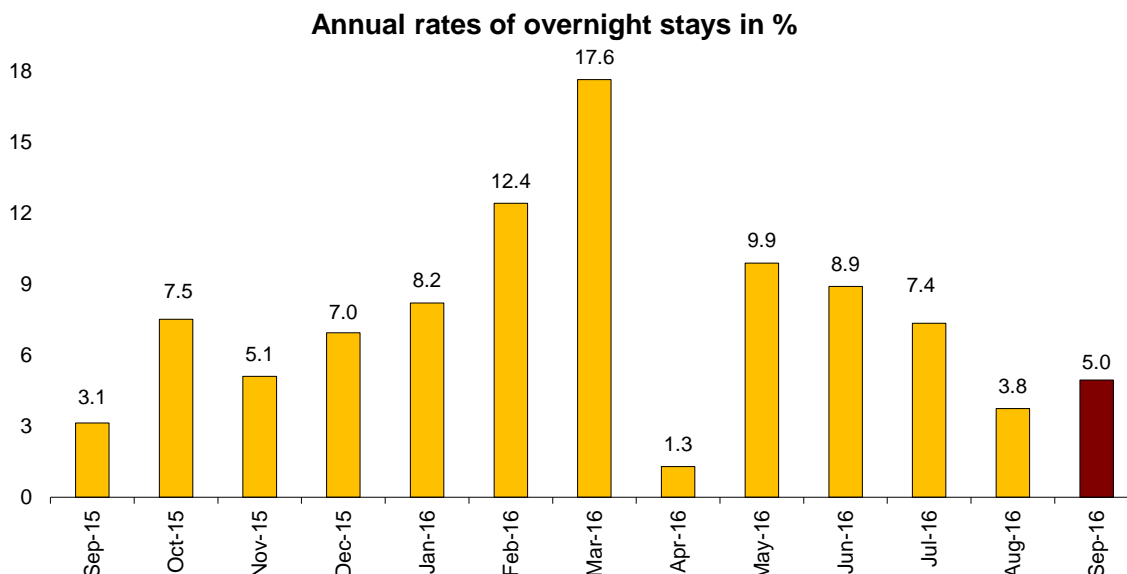
Overnight stays in hotel establishments register an increase of 5.0% in September, as compared to the same month of 2015

Hotels invoice an average of 84.4 euros per occupied room, which means an annual increase of 5.6%

In September, a total of 36.6 million overnight stays were registered in hotel establishments, 5.0% more than in the same month of 2015. Overnight stays by residents in Spain decreased by 1.7% and those of non-residents increased so by 8.0%.

The average stay decreased 2.2%, as compared to September 2015, standing at 3.5 nights per guest.

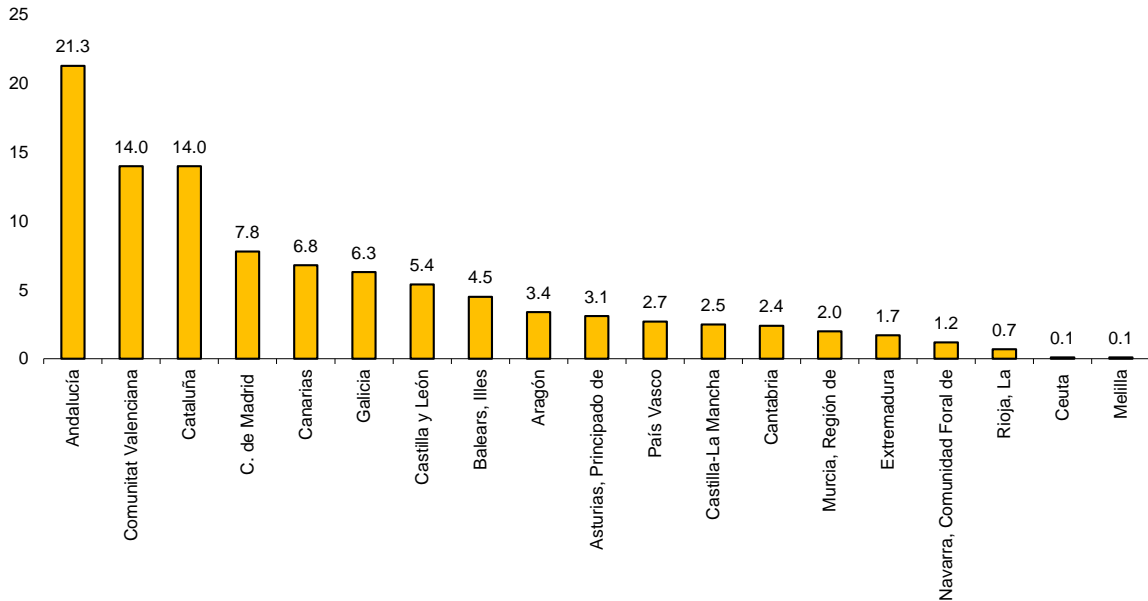
During the first nine months of 2016, overnight stays increased 7.4%, as compared to the same period of the previous year.



Main destinations

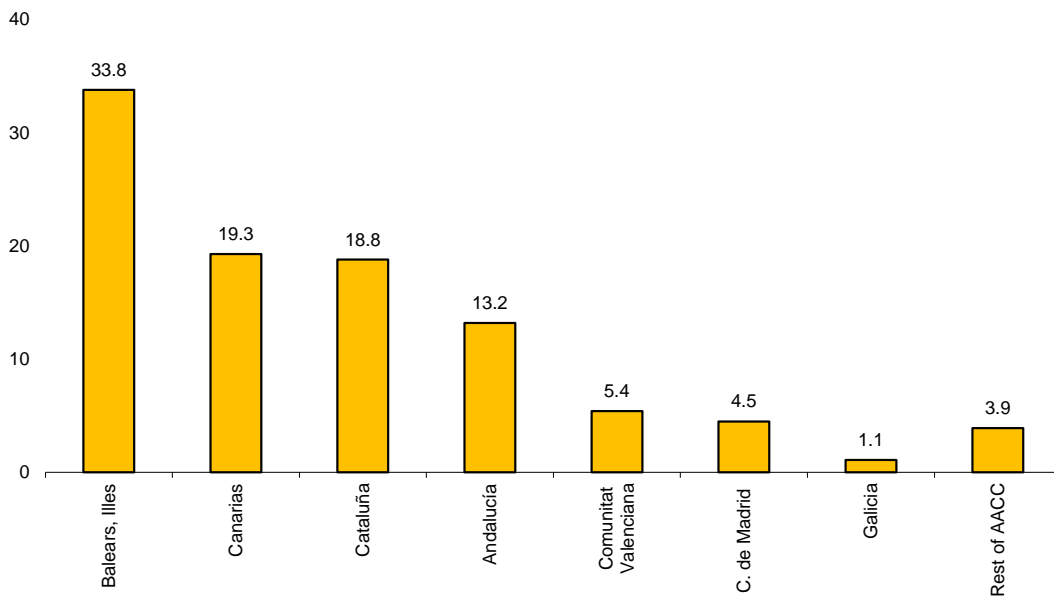
In September, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of -5.3%, -1.1%, -1.5% and -11.5%, respectively.

Distribution of overnight stays of guests resident in Spain in %



The main destination chosen by non-residents was Illes Balears, with 33.8% of the total amount of overnight stays. In this Autonomous Community, overnight stays by non-residents increased 5.7% as compared to September 2015. The following destinations of non-residents were Canarias (19.3% of the total and an increase of 10.6% in overnight stays) and Cataluña (18.8% of the total and an increase of 7.9% in overnight stays).

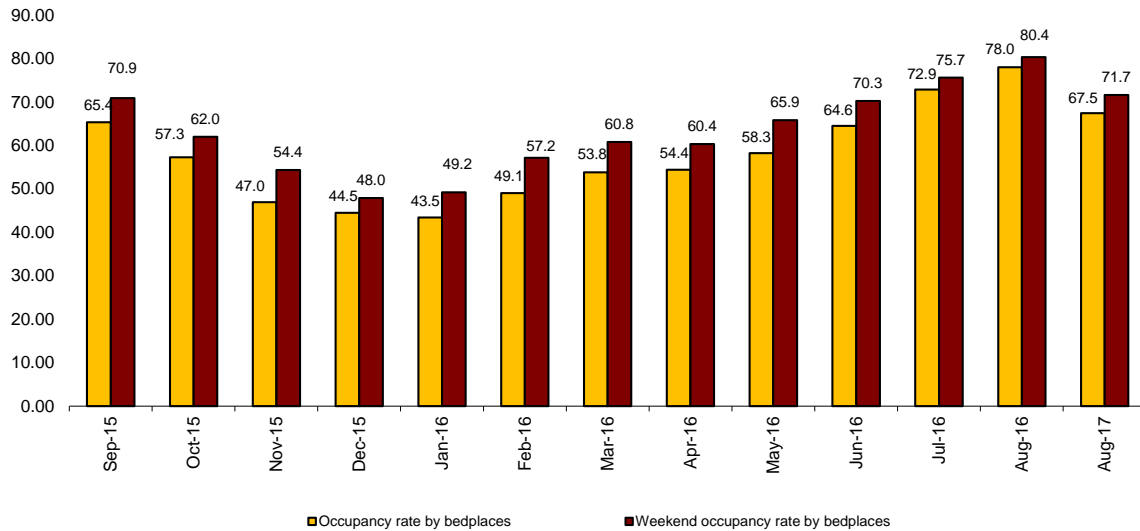
Distribution of overnight stays of guests resident abroad in %



Hotel Occupancy

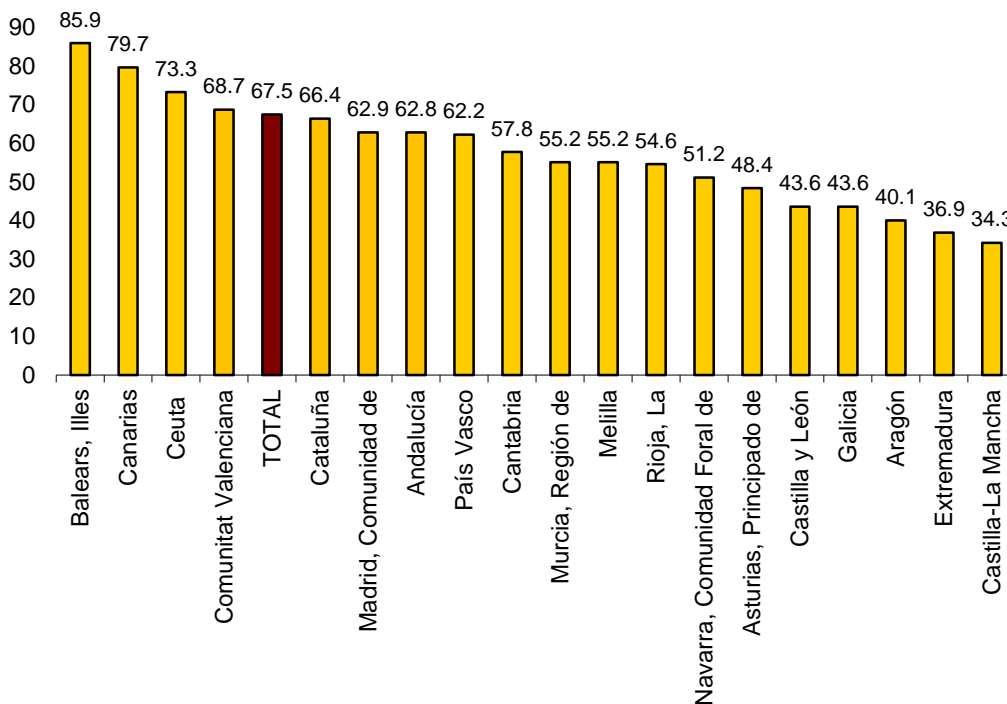
In September, 67.5% of the available bedplaces were occupied, indicating an annual increase of 3.2%. The weekend occupancy rate by bedplaces increased by 1.1%, standing at 71.7%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears registered the greatest occupancy rate by bedplaces in September (85.9%), followed by Canarias (79.7%) and Comunitat Valenciana (68.7%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the islands of Ibiza-Formentera registered the highest occupancy rate by bedplaces (87.6%), and the highest weekend occupancy rate (89.3%). The Costa del Sol recorded the highest number of overnight stays, with more than 2.0 million.

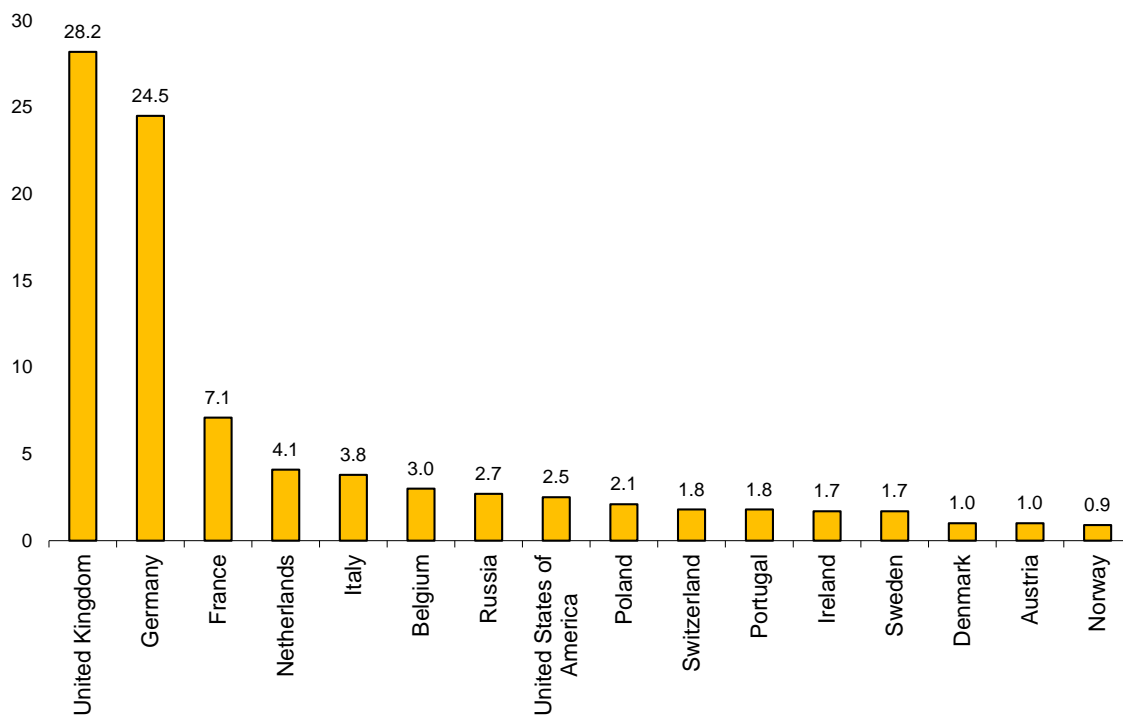
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Lluçmajor reached the highest occupancy rate by bedplaces (96.6%) and the greatest weekend occupancy rate (95.9%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 28.2% and 24.5%, respectively, of the total of overnight stays in hotel establishments by non-residents in September. The British market increased by 6.8%, and the German one did so by 5.3%.

Overnight stays of guests from France, the Netherlands and Italy (the following countries of origin) registered annual rates of 7.9%, 16.0% and 7.4%, respectively.

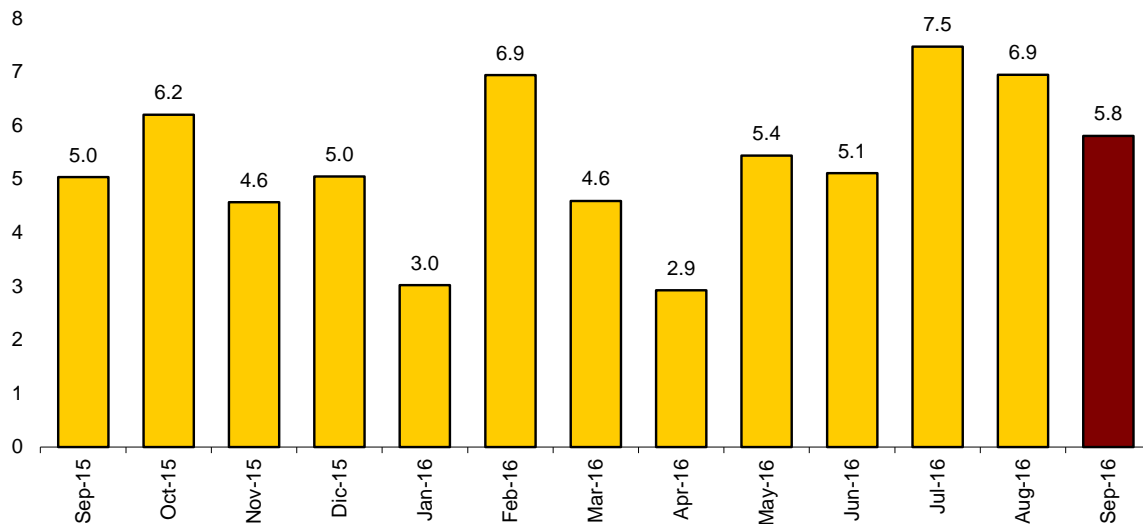
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 5.8% in September, that is, 1.1 points less than that of the previous month and 0.8 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 September (they represented 74.4% of the total). Hotel prices increased by 8.2% in the annual rate in Canarias, 7.3% in Illes Balears, 6.3% in Andalucía and 3.5% in Cataluña.

By hotel category, increase in hotel prices were registered in all of them. In five-golden-star establishments and in three-golden-star establishments (6.2% in both cases), in four -golden-star establishments (6.1%), in three-silver-star and in two-silver-star establishments (4.3% in both cases), in one-golden-star establishments (2.9%), in one-silver-star establishments (2.4%) and in two-golden-star establishments (1.6%).

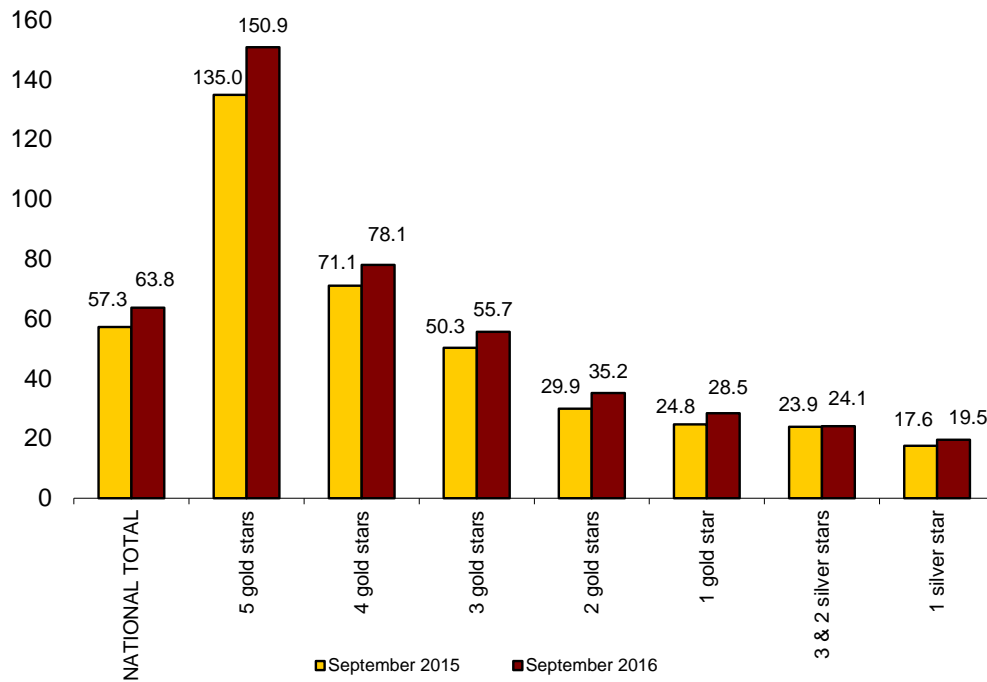
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in September was 84.4 euros, which represented an increase of 5.6% as compared to the same month of 2015.

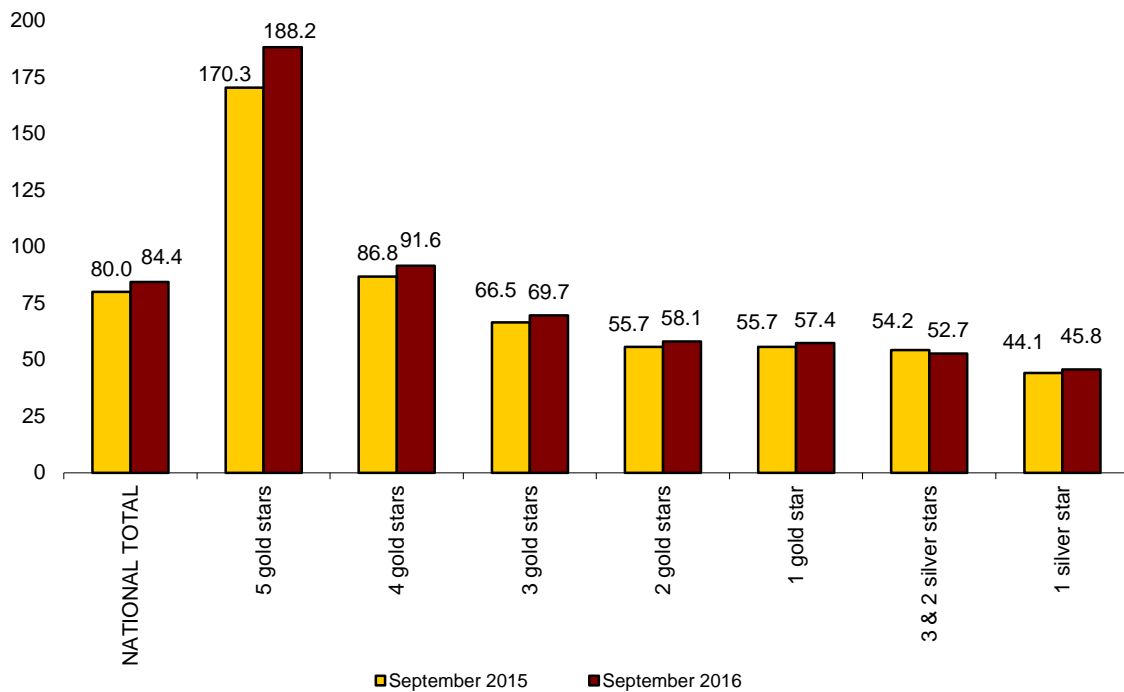
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 63.8 euros, with an increase of 11.3%.

By category, the average invoicing was 188.2 euros for five-star hotels, 91.6 euros for four-star hotels and 69.7 euros for three-star hotels. Income per available room for the same categories were 150.9, 78.1 and 55.7 euros, respectively.

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



Average daily rate (ADR) by hotel category in euros



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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

September 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	10,478,548	4,678,662	5,799,886	36,647,654	10,747,832	25,899,823	3.50
HOTELS: Golden stars							
Five	565,729	158,460	407,269	1,971,058	332,949	1,638,109	3.48
Four	4,716,242	1,985,162	2,731,079	17,640,547	4,674,082	12,966,465	3.74
Three	2,966,294	1,307,894	1,658,400	11,801,208	3,258,252	8,542,956	3.98
Two	827,250	475,665	351,585	2,223,836	1,019,967	1,203,870	2.69
One	346,701	199,221	147,480	763,665	377,024	386,641	2.20
INNS: Silver stars							
Two and three	548,610	322,024	226,586	1,189,181	617,283	571,897	2.17
One	507,722	230,237	277,486	1,058,159	468,275	589,885	2.08
Annual rate	7.29	3.88	10.21	4.95	-1.67	7.97	-2.18
Cumulative annual rate	7.12	4.38	9.90	7.40	3.11	9.80	0.26

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	16,564	850,895	1,770,013	67.46	71.67	75.57	253,340
HOTELS: Golden stars							
Five	296	44,977	93,300	69.05	73.51	79.83	32,275
Four	2,489	361,109	779,614	73.63	77.05	85.36	121,971
Three	2,972	247,508	520,161	73.59	77.01	80.28	65,594
Two	2,138	68,615	133,796	54.60	62.38	60.38	12,674
One	1,356	29,698	57,541	43.98	51.69	50.09	5,532
INNS: Silver stars							
Two and three	3,184	49,993	95,317	41.22	48.63	45.60	8,212
One	4,129	48,996	90,284	38.85	43.41	43.00	7,082
Annual rate	0.65	1.02	1.37	3.21	1.05	5.19	6.74

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									
Islas de Ibiza-Formentera	43,565	285,588	158,766	1,535,409	87.57	89.29	88.54	5.15	11,423
Isla de Mallorca	56,072	989,352	206,246	6,547,359	86.35	87.67	92.06	6.46	39,580
Palma - Calvià	29,169	388,100	104,418	2,306,072	84.32	87.74	90.36	5.78	14,921
Isla de Lanzarote	20,708	91,345	119,602	775,286	83.14	79.37	93.11	7.99	6,110
Sur De Gran Canaria	28,466	137,266	147,951	1,270,122	81.83	81.60	91.10	8.56	10,994
Sur De Tenerife	33,613	175,665	150,892	1,452,511	81.68	82.04	89.60	7.66	13,357
Isla de Tenerife	70,559	214,944	289,839	1,745,729	79.80	80.58	87.41	7.13	16,621
Costa Blanca	190,167	185,873	756,445	965,959	79.63	82.07	84.69	4.58	10,159

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

Costa del Sol	144,904	355,838	421,249	1,650,986	75.28	78.27	87.85	4.14	13,853
Barcelona	129,159	592,309	233,120	1,667,042	77.07	77.97	89.60	2.63	14,608
Isla de Gran Canaria	48,252	149,442	195,624	1,328,323	78.92	79.15	88.22	7.71	11,972
Costa Brava	151,924	248,223	369,164	1,118,133	65.04	70.05	70.44	3.72	8,887
Costa Daurada	160,474	152,969	389,105	969,434	65.24	70.80	79.07	4.33	6,700
Costa Barcelona	147,869	249,292	274,950	1,036,474	70.45	71.75	79.87	3.30	6,824
Isla de Fuerteventura	18,630	108,660	96,943	1,056,774	79.12	77.62	91.80	9.06	8,309
Costa de la Luz de Cádiz	122,871	91,071	385,692	424,890	66.67	73.96	77.24	3.79	6,442

Tourist site with a greater occupancy rate per month

Llucmajor	9,773	48,343	35,935	293,966	96.58	95.94	95.90	5.68	1,453
Santa Margalida	1,252	52,778	3,950	380,275	94.89	90.37	94.77	7.11	1,868
Sant Josep de Sa Talaia	9,283	85,393	35,313	419,003	91.50	92.01	91.61	4.80	3,472
Capdepera	1,077	72,093	5,236	483,157	89.31	89.02	95.35	6.67	2,549
Tías	5,141	28,836	31,404	254,058	88.69	83.58	93.86	8.40	1,682
Muro	1,171	57,700	5,175	478,470	88.65	90.35	95.46	8.22	2,663
Alcúdia	2,426	70,994	13,557	564,112	87.20	90.89	94.75	7.87	3,094
Eivissa	11,087	52,844	29,298	222,775	86.50	89.17	88.50	3.94	1,850
Sant Llorenç des Cardassar	712	78,618	4,408	611,175	86.48	88.69	93.08	7.76	3,853
Torremolinos	30,240	73,093	109,479	430,128	86.04	88.49	92.06	5.22	2,841

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

Barcelona	117,859	567,835	210,957	1,601,613	77.84	79.17	89.69	2.64	13,856
Madrid	366,682	459,387	570,426	1,055,840	65.95	71.59	82.33	1.97	11,287
Calvià	8,319	174,170	45,826	1,197,958	84.11	87.18	91.02	6.82	7,701
Benidorm	90,852	97,789	469,219	625,787	83.24	83.28	88.09	5.80	5,995
Palma	20,961	200,545	57,334	1,017,041	84.34	88.10	89.93	4.85	6,502
San Bartolomé de Tirajana	22,713	100,293	119,107	943,256	83.61	83.44	91.81	8.64	8,703
Salou	59,774	91,140	185,220	658,974	72.96	77.83	87.12	5.59	3,381
Adeje	14,429	87,564	69,132	737,779	80.98	80.55	90.03	7.91	7,015
Pájara	9,276	74,080	50,767	709,403	83.76	82.43	93.54	9.12	5,360
Lloret De Mar	29,839	92,414	103,184	539,173	78.30	77.49	82.48	5.25	2,699

* 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	10,478,548	100.00	36,647,654	100.00
Residents in Spain	4,678,662	44.65	10,747,832	29.33
Residents abroad	5,799,886	55.35	25,899,823	70.67
Total Residents abroad	5,799,886	100.00	25,899,823	100.00
Total Residents in E.U. (without Spain)	4,258,711	73.43	21,527,833	83.12
- Germany	1,012,749	17.46	6,337,547	24.47
- Austria	56,906	0.98	254,780	0.98
- Belgium	151,655	2.61	770,642	2.98
- Denmark	60,808	1.05	255,045	0.98
- Finland	24,392	0.42	83,619	0.32
- France	566,438	9.77	1,836,306	7.09
- Greece	8,981	0.15	30,367	0.12
- Ireland	98,895	1.71	441,085	1.70
- Italy	277,989	4.79	989,244	3.82
- Luxembourg	9,965	0.17	61,092	0.24
- Netherlands	225,005	3.88	1,047,919	4.05
- Poland	99,852	1.72	549,462	2.12
- Portugal	148,107	2.55	466,951	1.80
- United Kingdom	1,265,455	21.82	7,294,574	28.16
- Czech Republic	35,072	0.60	198,229	0.77
- Sweden	97,552	1.68	437,078	1.69
- Other EU countries*	118,888	2.05	473,891	1.83
Norway	55,547	0.96	233,331	0.90
Russia	108,437	1.87	701,310	2.71
Switzerland	107,790	1.86	468,542	1.81
Rest of Europe	113,764	1.96	408,223	1.58
Japan	56,673	0.98	108,411	0.42
United States of America	286,879	4.95	649,645	2.51
Rest of America	335,373	5.78	761,132	2.94
Africa	65,761	1.13	163,197	0.63
Other countries	410,950	7.09	878,198	3.39

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

Hotel Price Index (HPI). 2008 Base

September 2016

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	105.3	5.8
Andalucía	99.1	6.3
Aragón	68.2	2.7
Asturias, Principado de	91.0	3.7
Balears, Illes	123.6	7.3
Canarias	115.1	8.2
Cantabria	93.6	5.3
Castilla y León	91.2	3.5
Castilla - La Mancha	83.6	1.0
Cataluña	104.6	3.5
Comunitat Valenciana	99.3	6.9
Extremadura	91.1	4.4
Galicia	93.7	1.1
Madrid, Comunidad de	85.1	4.5
Murcia, Región de	83.9	1.3
Navarra, Comunidad Foral de	85.7	2.4
País Vasco	107.0	4.3
Rioja, La	92.7	1.1
Ceuta	95.0	-3.2
Melilla	100.5	-2.2

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	105.3	5.8
HOTELS: Gold stars		
Five	101.1	6.2
Fourth	102.5	6.1
Three	111.9	6.2
Two	99.6	1.6
One	112.4	2.9
HOSTALS: Silver stars		
Three and two	101.7	4.3
One	104.2	2.4

Indicators on the Profitability of the Hotel Sector

September 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	84.4	5.6	63.8	11.3
Andalucía	86.6	6.5	63.7	11.3
Aragón	54.2	4.3	24.9	10.6
Asturias, Principado de	58.8	5.3	31.5	7.5
Balears, Illes	94.8	9.3	87.3	16.1
Canarias	86.8	1.5	77.6	6.5
Cantabria	66.1	0.5	39.6	12.8
Castilla y León	56.4	1.7	27.7	3.9
Castilla - La Mancha	54.3	-3.9	21.3	0.2
Cataluña	88.2	4.0	66.7	10.9
Comunitat Valenciana	75.8	4.9	58.2	12.0
Extremadura	58.4	5.1	23.9	10.4
Galicia	56.9	1.4	27.4	8.4
Madrid, Comunidad de	85.0	6.9	66.3	8.6
Murcia, Región de	64.3	-2.1	38.5	3.0
Navarra, Comunidad Foral de	61.7	1.3	36.9	5.3
País Vasco	90.2	7.6	69.2	11.1
Rioja, La	63.7	0.1	39.9	-5.7
Ceuta	71.6	1.8	47.5	16.6
Melilla	67.2	3.4	47.7	5.2

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	84.4	5.6	63.8	11.3
HOTELS: Gold stars				
Five	188.2	10.5	150.9	11.8
Four	91.6	5.5	78.1	9.8
Three	69.7	4.8	55.7	10.7
Two	58.1	4.3	35.2	17.7
One	57.4	3.1	28.5	14.9
GUESTHOUSES: Silver stars				
Three and two	52.7	-2.8	24.1	0.9
One	45.8	3.8	19.5	11.3

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

Indicators on Profitability (ANNEX OF TABLES) - September 2016

24rd October 2016