

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

Overnight stays in hotel establishments register an increase of 12.4% in February, as compared to the same month of 2015

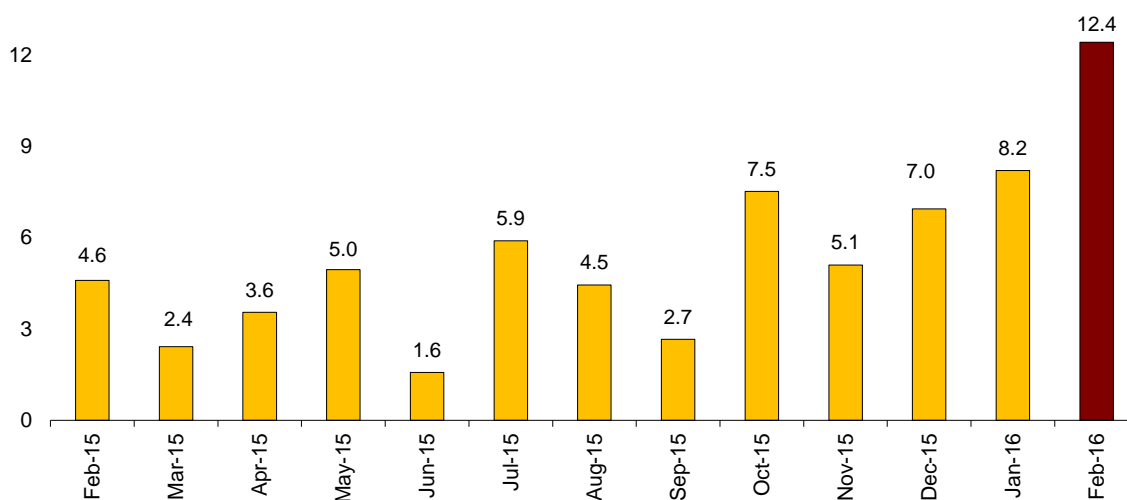
Hotels invoice an average of 76.6 euros per available room, which means an annual increase of 7.9%

In February, a total of 16.3 million overnight stays were registered in hotel establishments, 12.4% more than in the same month of 2015. Overnight stays for residents in Spain increased by 11.2% and those of non-residents did so by 13.3%.

The average stay does not vary as compared to February 2015, standing at 2.9 nights per guest.

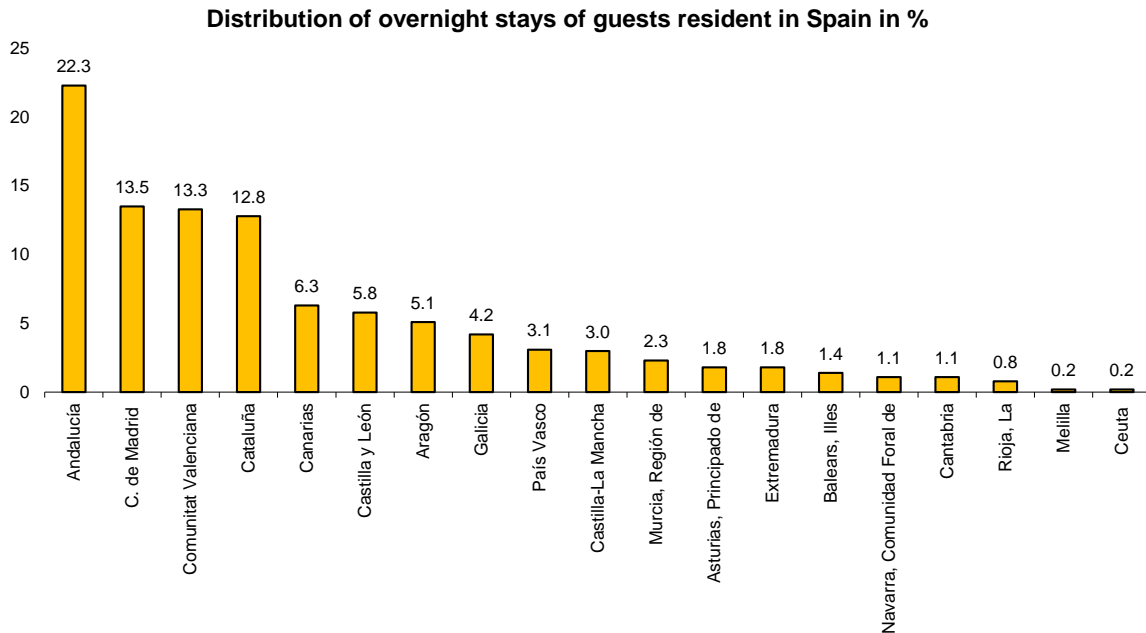
During the first two months of 2016, overnight stays increased 10.4%, as compared to the same period of the previous year.

Annual rates of overnight stays in %

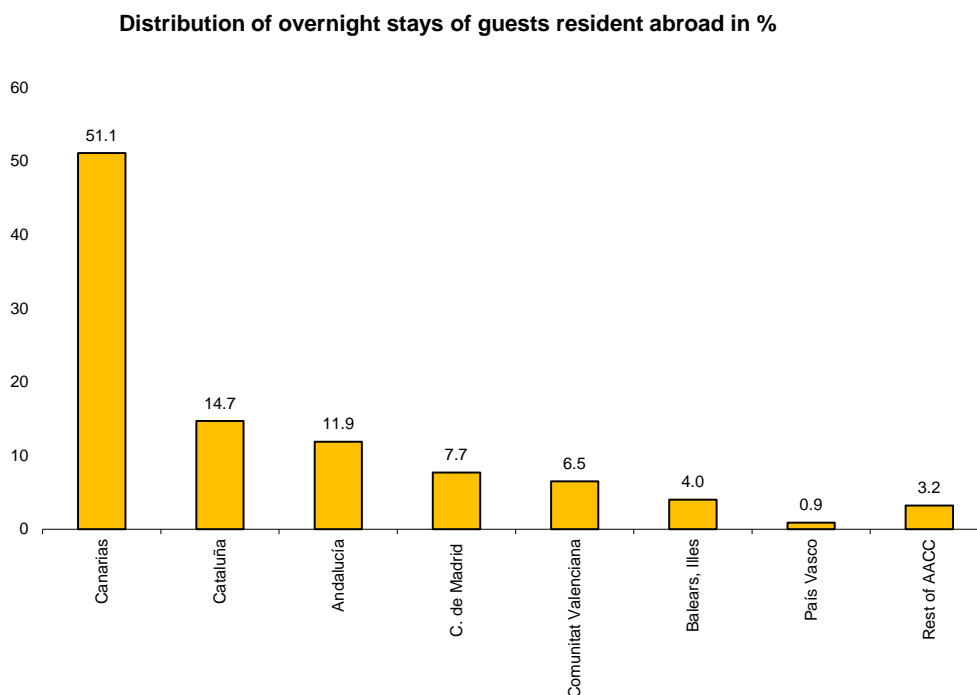


Main destinations

In February, Andalucía, Comunidad de Madrid, Comunitat Valenciana and Cataluña were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 15.1%, 13.3%, 14.2% and 11.1%, respectively.



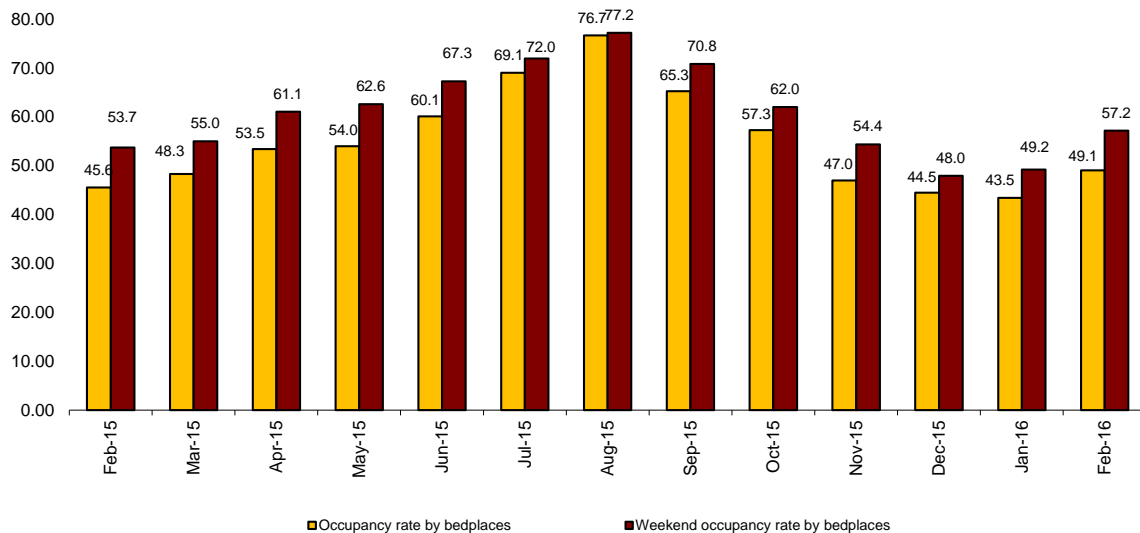
The main destination chosen by non-residents was Canarias, with 51.1% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 10.6% as compared to February 2015. The following destinations of non-residents were Cataluña (14.7% of the total and an increase of 17.2% in overnight stays) and Andalucía (11.9% of the total and an increase of 10.3% in overnight stays).



Hotel Occupancy

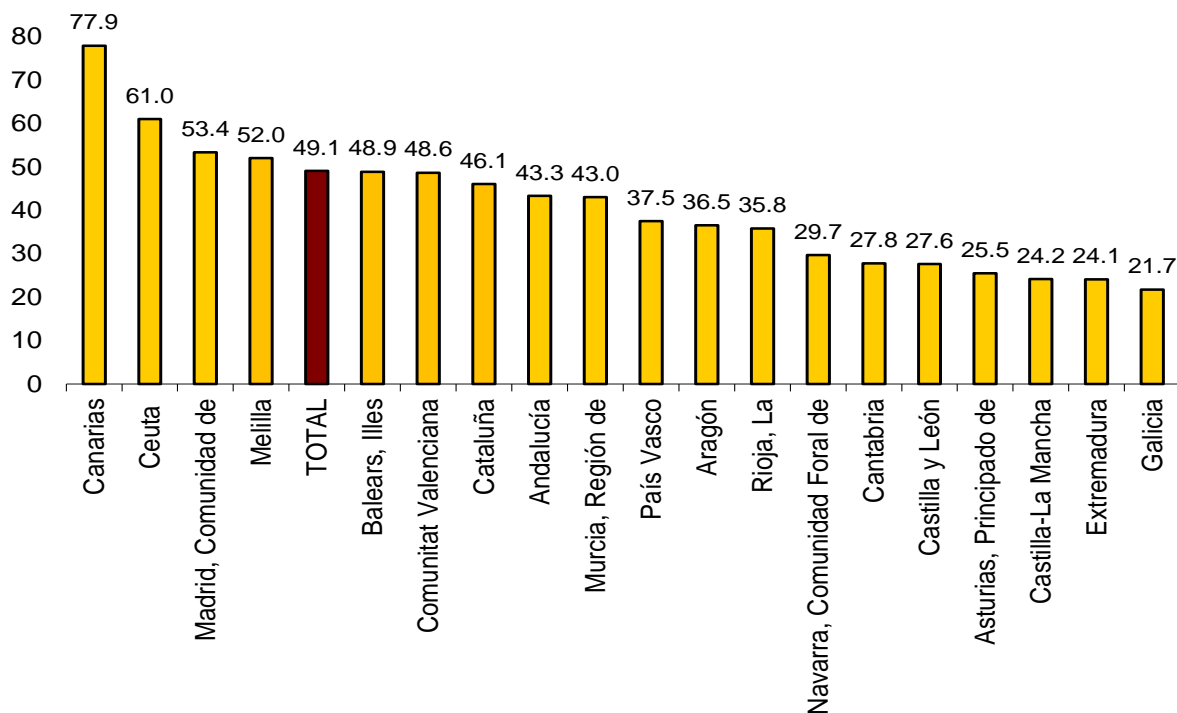
In February, 49.1% of the available bedplaces were occupied, indicating an annual increase of 7.6%. The weekend occupancy rate by bedplaces increased by 6.4%, standing at 57.2%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in February (77.9%), followed by Comunidad de Madrid (53.4%) and Illes Balears (48.9%).

Occupancy rate by bedplaces by Automous Community



By tourist area, the South of Gran Canaria registered the highest occupancy rate by bedplaces (83.3%), whereas the South of Tenerife registered the highest weekend occupancy rate (83.3%). The island of Tenerife registered the highest number of overnight stays, with more than 2.0 million.

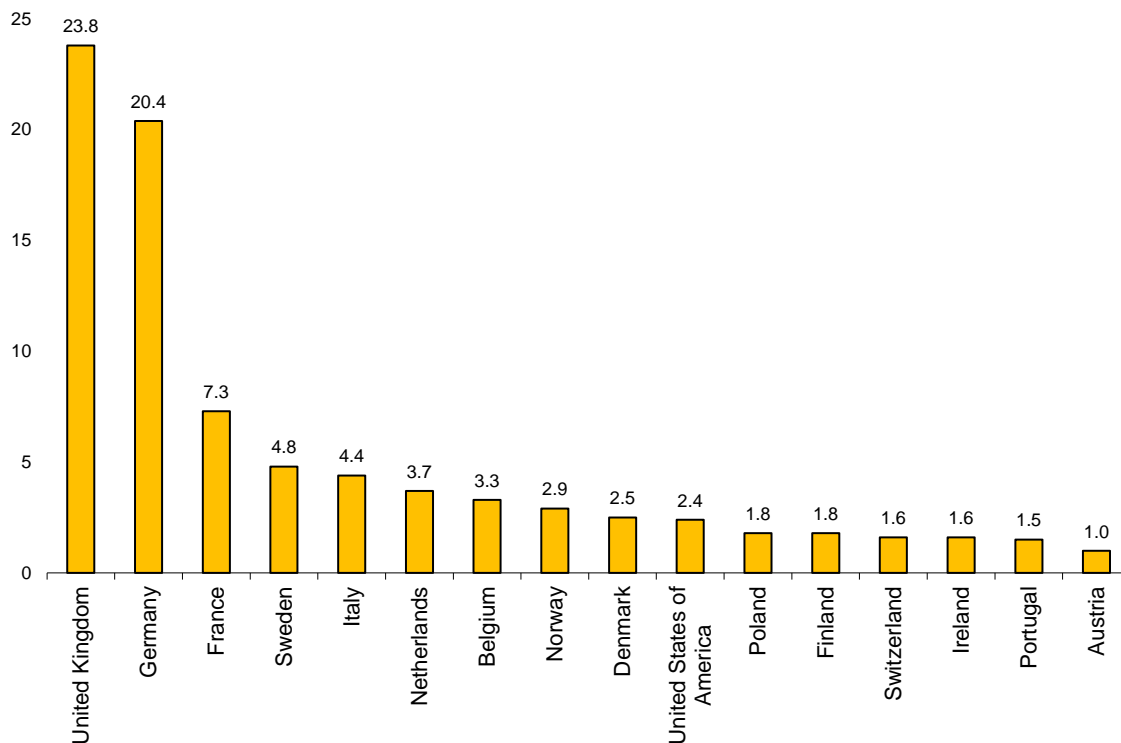
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Puerto de la Cruz reached the highest occupancy rate by bedplaces (85.1%) and the greatest weekend occupancy rate (86.9%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 23.8% and 20.4%, respectively, of the total of overnight stays in hotel establishments by non-residents in February. The British market increased by 22.0%, and the German one did so by 2.3%.

Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of 9.7%, 16.6% and 16.7%, respectively.

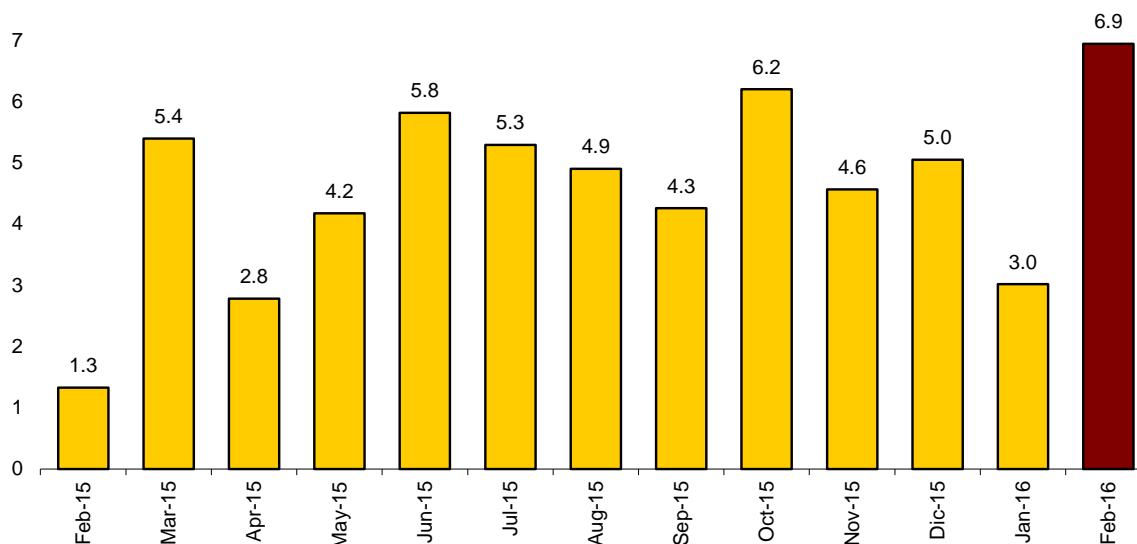
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 6.9% in February, that is, 3.9 points higher than that of the previous month and 5.6 points over that registered in the previous year.

Hotel Prices Index. Annual variation rate



Canarias, Cataluña, Andalucía and Comunidad de Madrid were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of February (they represented 77.3% of the total). Hotel prices increased 20.4% in the annual rate in Cataluña, 7.0% in Comunidad de Madrid, 4.5% in Canarias and 3.3% in Andalucía.

By hotel category, increase in hotel prices were registered in all of them. In one-golden-star establishments (10.1%), in two-golden-star establishments (7.9%), in five-golden-star establishments (7.2%), in four-golden-star and in three-golden-star establishments (6.9% in both cases), in three -golden-star and in two -golden-star establishments (5.1%) and one-silver-star establishments (3.7%).

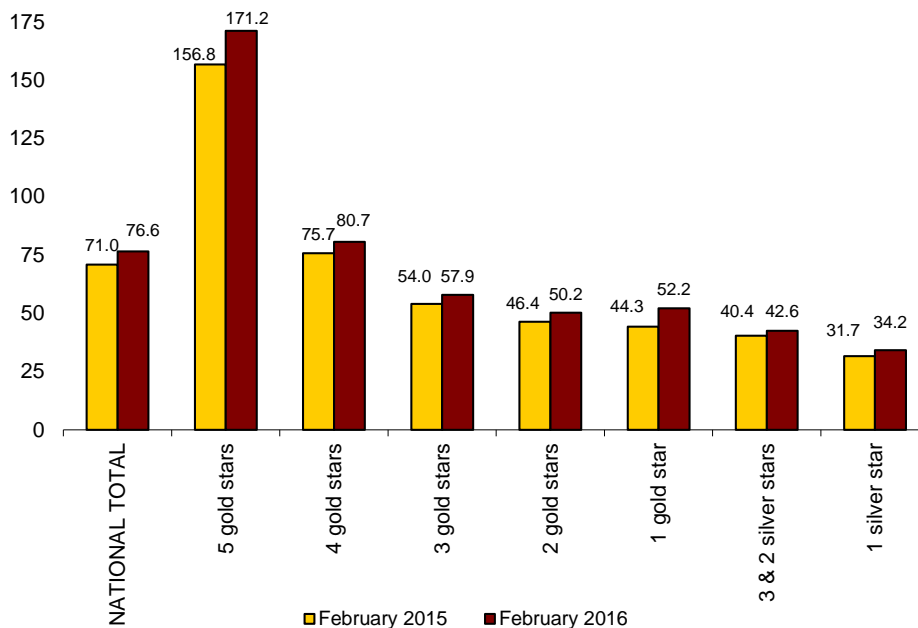
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in February was 76.6 euros, which represented an increase of 7.9% as compared to the same month of 2015.

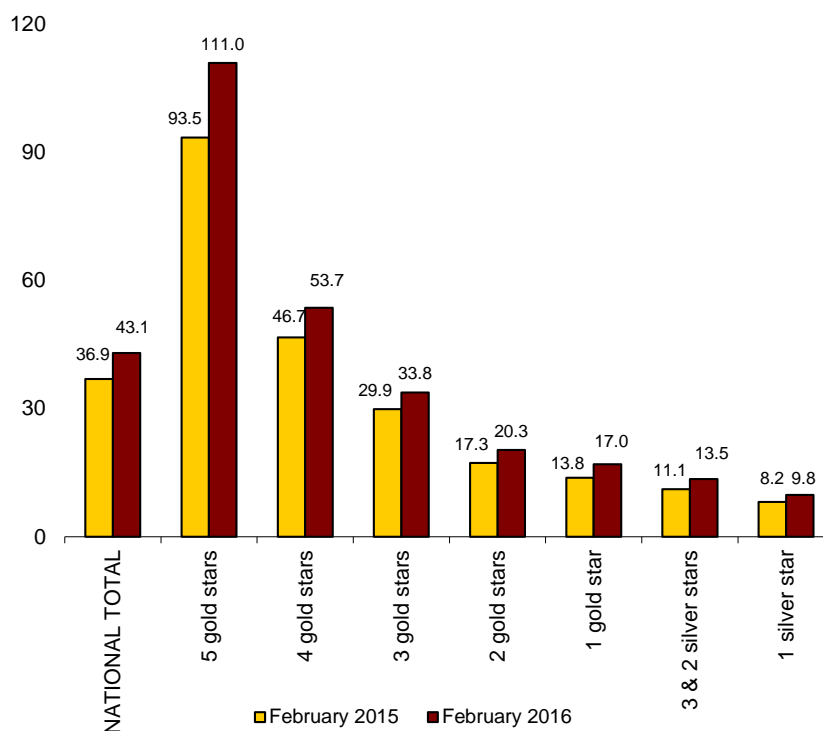
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 43.1 euros, with an increase of 16.5%.

By category, the average invoicing was 171.2 euros for five-star hotels, 80.7 euros for four-star hotels and 57.9 euros for three-star hotels. Income per available room for the same categories was 111.0, 53.7, and 33.8 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)

February 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	5,550,448	3,182,561	2,367,887	16,315,716	6,470,496	9,845,219	2.94
HOTELS: Golden stars							
Five	345,643	119,263	226,380	1,210,587	225,658	984,930	3.50
Four	2,737,994	1,461,954	1,276,040	8,698,958	2,979,212	5,719,745	3.18
Three	1,399,141	872,875	526,266	4,138,354	1,856,158	2,282,196	2.96
Two	400,149	279,936	120,213	859,108	513,559	345,549	2.15
One	167,087	114,847	52,240	330,146	196,098	134,048	1.98
INNS: Silver stars							
Two and three	301,880	215,469	86,410	589,440	401,773	187,666	1.95
One	198,555	118,216	80,338	489,123	298,038	191,085	2.46
Annual rate	12.41	10.55	15.02	12.42	11.15	13.27	0.01
Cumulative annual rate	11.37	10.08	13.10	10.40	10.11	10.59	-0.87

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	12,576	556,622	1,132,710	49.07	57.19	56.85	147,616
HOTELS: Golden stars							
Five	237	36,282	74,366	55.05	62.32	64.65	22,942
Four	1,819	247,682	518,719	57.00	65.33	67.28	74,284
Three	1,964	128,347	270,053	52.35	60.00	60.07	29,904
Two	1,557	44,465	85,579	34.39	43.54	40.31	6,762
One	992	21,211	40,838	27.75	38.37	32.86	3,375
INNS: Silver stars							
Two and three	2,665	40,292	75,118	26.95	35.57	31.80	5,615
One	3,341	38,343	68,037	24.73	30.64	30.05	4,735
Annual rate	0.25	0.19	0.64	7.63	6.42	8.61	4.16

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									
Sur de Gran Canaria	11,527	159,430	61,106	1,320,263	83.33	81.65	92.84	8.08	10,390
Sur de Tenerife	15,301	187,757	82,728	1,507,947	82.64	83.27	92.09	7.83	13,296
Isla de Gran Canaria	27,722	179,379	103,548	1,410,285	81.80	80.76	91.56	7.31	11,454
Isla de Tenerife	43,866	233,865	195,533	1,848,027	81.55	82.52	90.62	7.36	16,556
Isla de La Gomera	982	6,088	1,957	37,766	76.78	79.37	83.90	5.62	427
Isla de Lanzarote	13,159	94,243	64,785	734,348	75.23	74.39	88.73	7.44	5,718
Isla de Fuerteventura	7,899	114,924	31,221	941,213	70.18	69.13	78.59	7.92	7,650
Costa Blanca	137,853	85,810	512,404	443,990	60.00	70.02	64.54	4.28	6,521

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

Barcelona	135,529	382,393	252,814	1,047,071	55.84	61.64	69.25	2.51	12,712
Costa del Sol	122,967	128,905	328,348	588,029	52.72	61.21	63.67	3.64	7,676
Isla de Mallorca	26,543	74,479	66,130	388,402	51.16	51.94	59.51	4.50	4,286
Palma - Calvià	19,529	52,921	50,964	288,893	52.18	51.64	62.46	4.69	3,268
Costa Barcelona	90,771	81,722	146,122	192,449	44.49	45.50	57.69	1.96	2,939
Costa Brava	72,632	36,424	139,924	106,133	35.46	52.32	40.05	2.26	2,236
Costa de Almería	53,049	13,120	170,528	59,459	37.78	45.76	55.12	3.48	1,805
Costa de la Luz de Cádiz	60,575	24,661	116,041	71,119	37.43	51.60	45.80	2.20	2,059

Tourist site with a greater occupancy rate per month

Puerto de La Cruz	13,570	31,387	78,918	280,669	85.08	86.92	90.00	8.00	2,410
San Bartolomé de Tirajana	9,237	115,960	50,009	959,502	83.32	81.23	92.48	8.06	8,223
Mogán	2,343	43,260	11,338	359,535	83.20	82.52	93.83	8.13	2,179
Adeje	4,910	97,822	27,841	800,200	83.09	83.57	92.99	8.06	7,293
Arona	3,894	55,365	23,692	452,940	82.98	84.32	92.08	8.04	3,218
Yaiza	5,782	41,541	32,510	319,089	77.57	78.76	90.36	7.43	2,743
Tías	2,934	28,308	15,568	232,125	74.34	71.14	89.01	7.93	1,580
Teguise	2,013	22,139	10,755	171,136	73.85	71.65	87.12	7.53	1,274
Benidorm	69,468	45,941	361,875	305,706	71.23	80.65	74.40	5.78	3,785
Pájara	3,497	70,685	13,594	587,714	70.52	68.76	76.27	8.11	4,864

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

Madrid	384,234	307,431	666,839	687,972	57.28	70.78	69.51	1.96	11,161
Barcelona	125,104	366,791	232,298	1,007,871	56.49	62.36	69.63	2.52	12,018
Sevilla	109,773	77,730	188,957	164,537	55.17	75.48	63.49	1.89	3,452
Torremolinos	25,908	25,330	108,124	176,495	68.92	74.83	75.81	5.55	1,671
Valencia	67,130	52,400	118,623	132,492	47.83	53.15	60.69	2.10	1,884
Granada	81,101	50,392	141,966	87,052	56.41	79.20	60.71	1.74	1,584
Palma	17,743	36,101	46,489	177,455	53.25	52.57	62.55	4.16	2,201
Oliva (La)	1,650	17,366	8,243	158,355	69.48	69.13	86.12	8.76	1,433
Málaga	42,137	37,426	69,192	86,336	56.23	66.55	70.02	1.95	1,137
Fuengirola	22,215	15,313	57,868	86,354	53.95	71.73	64.26	3.84	912

* 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	5,550,448	100.00	16,315,716	100.00
Residents in Spain	3,182,561	57.34	6,470,496	39.66
Residents abroad	2,367,887	42.66	9,845,219	60.34
Total Residents abroad	2,367,887	100.00	9,845,219	100.00
Total Residents in E.U. (without Spain)	1,646,329	69.53	7,861,975	79.86
- Germany	306,041	12.92	2,005,309	20.37
- Austria	21,466	0.91	96,733	0.98
- Belgium	62,121	2.62	320,676	3.26
- Denmark	41,659	1.76	248,477	2.52
- Finland	28,978	1.22	171,978	1.75
- France	248,065	10.48	717,585	7.29
- Greece	6,365	0.27	19,298	0.20
- Ireland	37,003	1.56	156,748	1.59
- Italy	133,244	5.63	427,893	4.35
- Luxembourg	3,220	0.14	20,214	0.21
- Netherlands	81,347	3.44	367,968	3.74
- Poland	34,652	1.46	178,489	1.81
- Portugal	74,450	3.14	150,806	1.53
- United Kingdom	437,192	18.46	2,346,601	23.83
- Czech Republic	5,856	0.25	22,547	0.23
- Sweden	76,979	3.25	475,494	4.83
- Other EU countries*	47,692	2.01	135,156	1.37
Norway	41,955	1.77	283,194	2.88
Russia	23,241	0.98	78,969	0.80
Switzerland	38,859	1.64	157,966	1.60
Rest of Europe	47,445	2.00	162,710	1.65
Japan	46,907	1.98	86,343	0.88
United States of America	92,272	3.90	236,913	2.41
Rest of America	130,836	5.53	325,751	3.31
Africa	41,034	1.73	96,665	0.98
Other countries	259,008	10.94	554,733	5.63

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

Hotel Price Index (HPI). 2008 Base

February 2016

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	94.9	6.9
Andalucía	95.3	3.3
Aragón	79.6	2.6
Asturias, Principado de	80.7	6.8
Balears, Illes	99.1	7.2
Canarias	111.0	4.5
Cantabria	87.6	1.6
Castilla y León	88.8	2.2
Castilla - La Mancha	87.4	1.8
Cataluña	88.6	20.4
Comunitat Valenciana	90.2	4.2
Extremadura	85.5	5.4
Galicia	90.1	3.5
Madrid, Comunidad de	78.5	7.0
Murcia, Región de	80.3	2.7
Navarra, Comunidad Foral de	78.9	3.1
País Vasco	84.7	0.8
Rioja, La	87.8	3.2
Ceuta	84.6	-14.6
Melilla	92.4	-0.7

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	94.9	6.9
HOTELS: Gold stars		
Five	90.2	7.2
Fourth	94.7	6.9
Three	95.9	6.9
Two	92.1	7.9
One	107.0	10.1
HOSTALS: Silver stars		
Three and two	91.7	5.1
One	98.1	3.7

Indicators on the Profitability of the Hotel Sector

February 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	76.6	7.9	43.1	16.5
Andalucía	59.9	-1.1	30.9	7.6
Aragón	58.1	-2.0	23.8	15.1
Asturias, Principado de	50.1	7.6	15.5	23.9
Balears, Illes	64.7	15.0	33.6	15.9
Canarias	92.2	5.1	80.9	8.1
Cantabria	55.4	0.8	18.0	15.1
Castilla y León	50.7	1.2	16.0	9.8
Castilla - La Mancha	52.0	-1.1	15.7	10.1
Cataluña	103.9	29.5	57.8	45.5
Comunitat Valenciana	52.6	2.1	28.9	13.3
Extremadura	54.7	8.1	15.3	17.2
Galicia	50.8	8.2	13.9	18.7
Madrid, Comunidad de	78.5	7.3	51.2	17.5
Murcia, Región de	47.8	-8.8	23.9	-5.4
Navarra, Comunidad Foral de	56.0	3.8	21.3	20.6
País Vasco	65.8	4.3	31.2	17.0
Rioja, La	58.5	0.3	26.2	12.6
Ceuta	66.6	-6.7	43.3	23.0
Melilla	67.0	5.7	44.4	16.0

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	76.6	7.9	43.1	16.5
HOTELS: Gold stars				
Five	171.2	9.2	111.0	18.7
Four	80.7	6.6	53.7	15.0
Three	57.9	7.1	33.8	13.1
Two	50.2	8.3	20.3	17.6
One	52.2	17.8	17.0	23.1
GUESTHOUSES: Silver stars				
Three and two	42.6	5.3	13.5	21.3
One	34.2	8.0	9.8	20.5

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room