

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
April 2015. *Provisional data*

Overnight stays in hotel establishments¹ register an increase of 3.6% in April, as compared to the same month of 2014

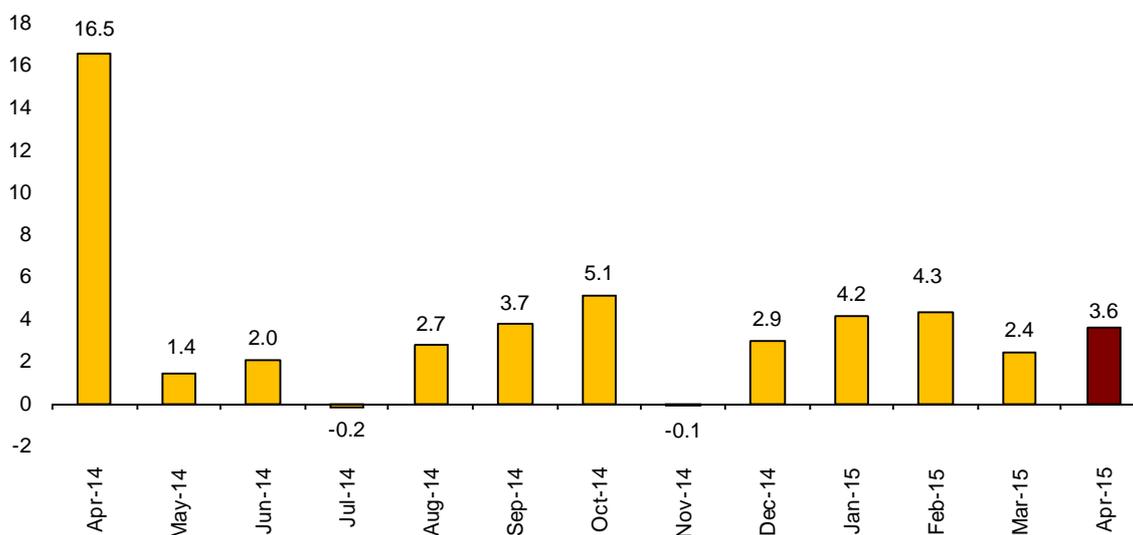
Hotels invoice an average of 71.0 euros per occupied room, which means an annual increase of 2.9%

In April, a total of 23.0 million overnight stays were registered in hotel establishments, 3.6% more than in the same month of 2014. Overnight stays for residents in Spain increased by 5.7% and those of non-residents did so by 2.1%. The average stay decreased 1.0%, as compared to April 2014, standing at 3.0 nights per guest.

During the first quarter in 2015, overnight stays increased 3.5%, as compared to the same period of the previous year.

Worth noting is the fact that, since Easter holidays took place in April and March this year, and in 2014 they took place in April, it is desirable to analyse the **aggregated period March-April**. An increase of 3.0% is observed within this period regarding overnight stays, as compared with the same two-month period of 2014. Overnight stays for residents increased by 7.3% during this period, and those of non-residents did so by 0.2%.

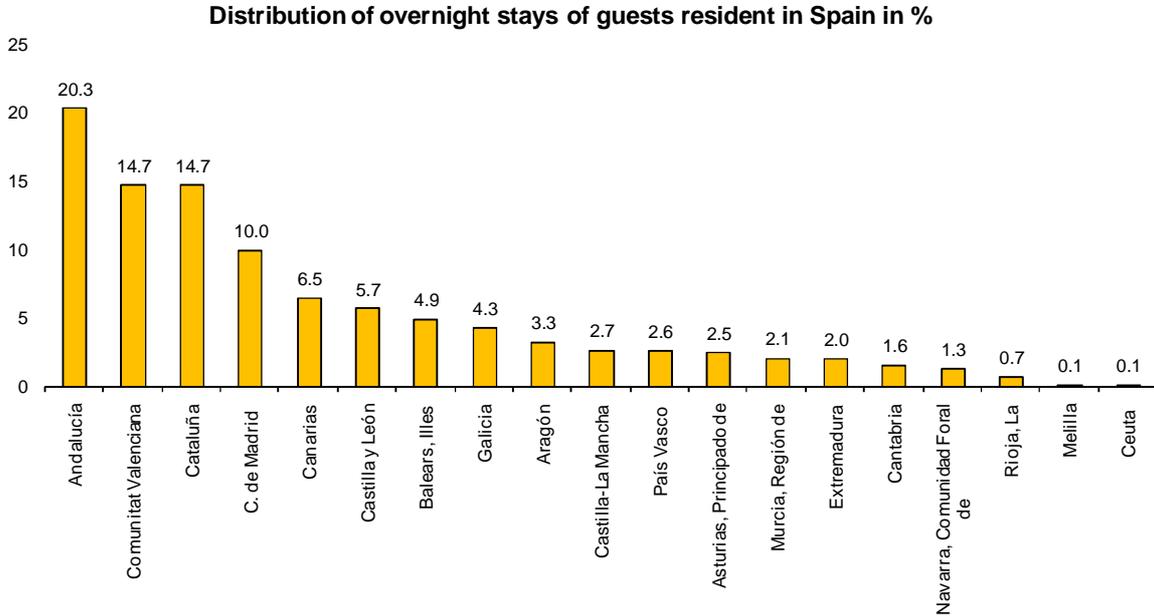
Annual rates of overnight stays in %



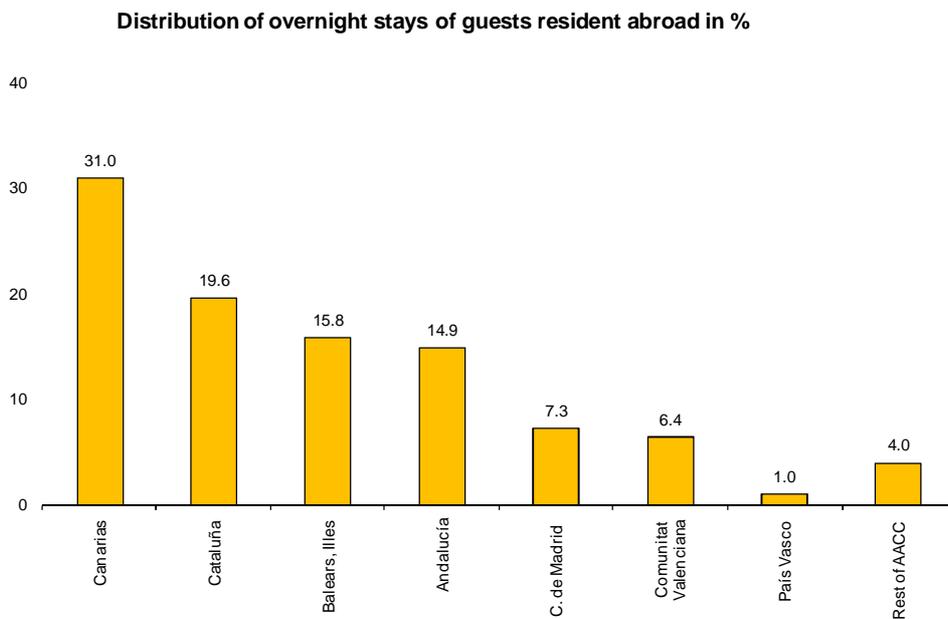
¹ Since Easter Week is celebrated during March and April in 2015, and in 2014 it was celebrated in April, it is necessary to analyse the two months combined.

Main destinations

In April, 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 1.6%, 9.7%, 1.9% and 12.2%, respectively.

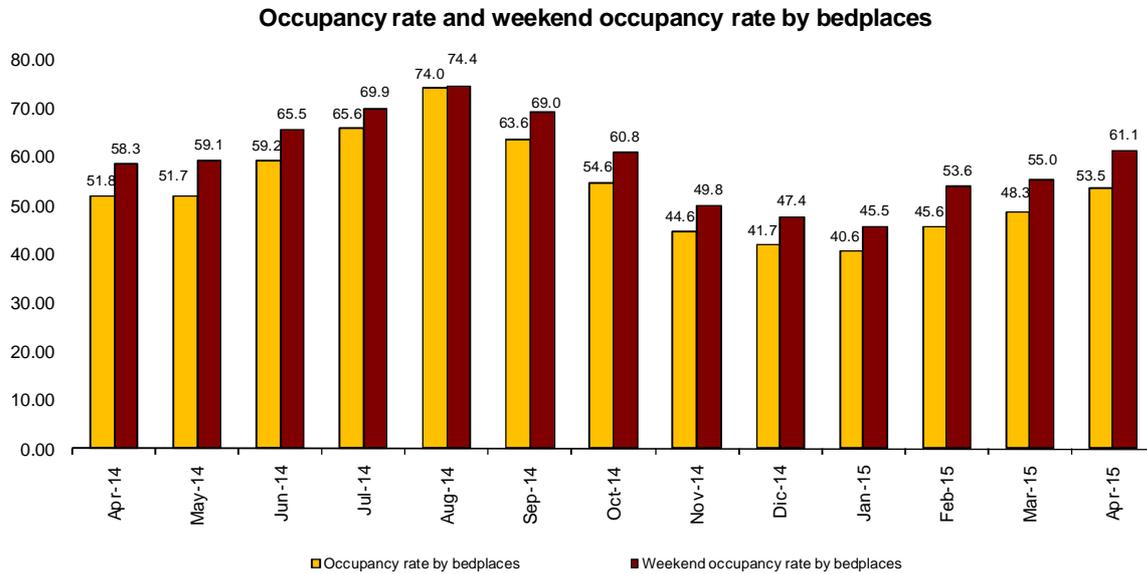


The main destination chosen by non-residents was Canarias, with 31.0% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 2.4% as compared to April 2014. The following destinations of non-residents were Cataluña (19.6% of the total) and Illes Balears (15.8%). Overnight stays in these communities increased by 7.4% and 2.0%, respectively.



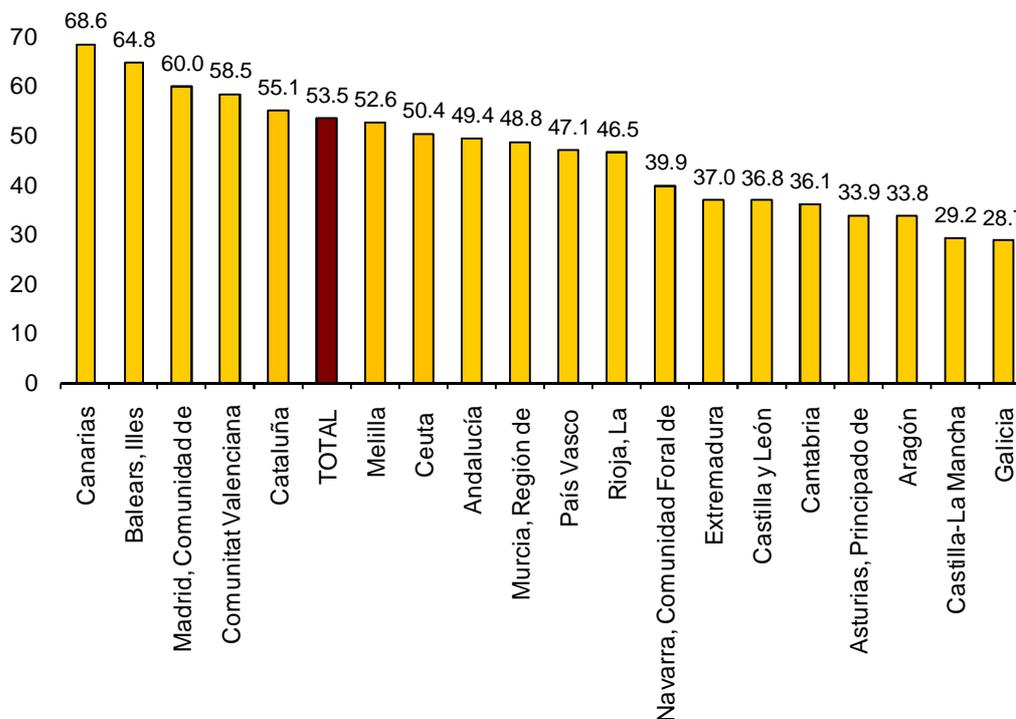
Hotel Occupancy

In April, 53.3% of the available bedplaces were occupied, indicating an annual increase of 3.2%. The weekend occupancy rate by bedplaces increased by 4.7%, standing at 61.1%.



Canarias registered the greatest occupancy rate by bedplaces in April (68.6%), followed by Illes Balears (64.8%) and Comunidad de Madrid (60.0%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the island of Lanzarote registered the highest occupancy rate by bedplaces (74.3%), while Costa Blanca registered the highest weekend occupancy rate (79.0%). The island of Mallorca recorded the highest number of overnight stays, with more than 2.3 million.

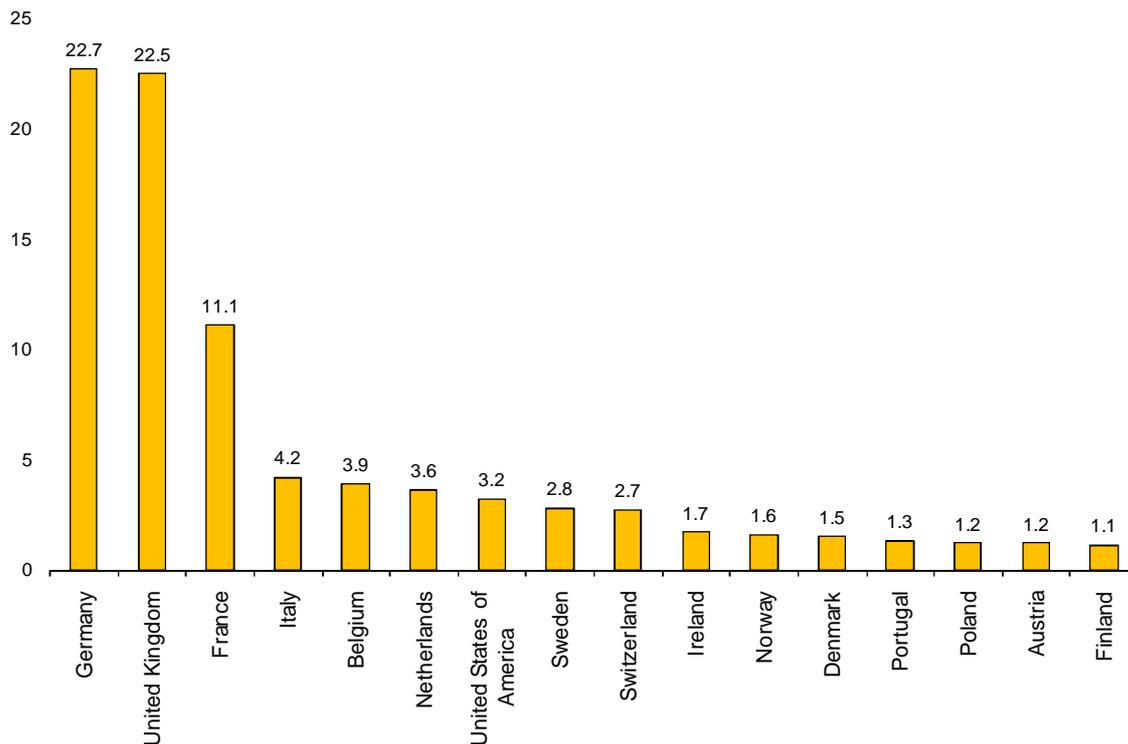
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Benidorm. Benidorm reached both the highest occupancy rate by bedplaces (79.7%) and the greatest weekend occupancy rate (89.1%).

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom concentrated 22.7% and 22.5%, respectively, of the total of overnight stays in hotel establishments by non-residents in April. The German market decreased by 4.6%, while the British one increased by 6.8%.

Overnight stays of guests from France, Italy and Belgium (the following countries of origin) registered annual rates of 19.4%, 8.0% and 13.2%, respectively.

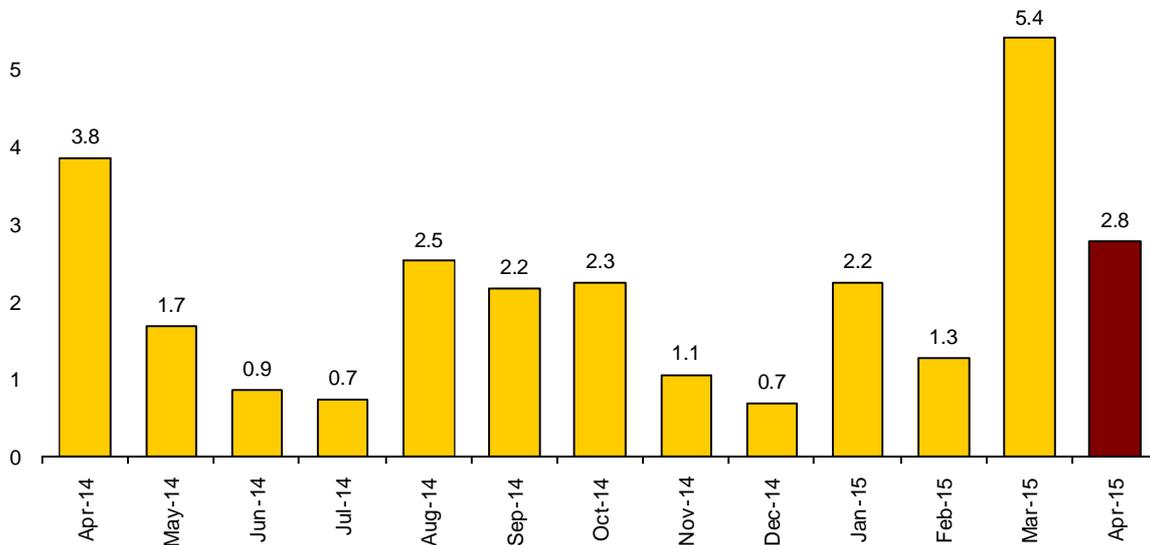
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 2.8% in April, that is, 2.6 points lower than that of the previous month and 1.0 point under that registered in the previous year.

Hotel Prices Index. Annual variation rate



Canarias, Cataluña, Andalucía and Illes Balears were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of April (they represented 69.1% of the total). Hotel prices increased 6.3% in the annual rate in Illes Balears, 3.4% in Cataluña, 2.9% in Andalucía and 1.1% in Canarias.

By hotel category, the increase in hotel prices were registered in three-golden-star establishments (4.7%), one-golden-star establishments (3.0%), four-golden-star establishments (2.7%), five-golden-star establishments (1.6%), two-golden-star establishments (0.4%) and three and two-silver-star establishments (0.1%).

In turn, the prices of one-silver-star establishments decreased by 1.9%.

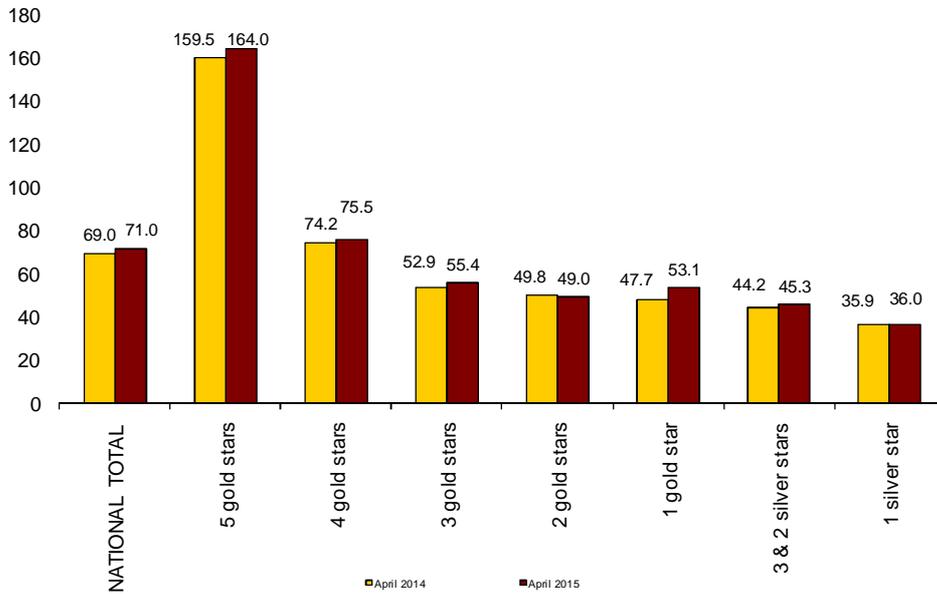
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in April was 71.0 euros, which represented an increase of 2.9% as compared to the same month of 2014.

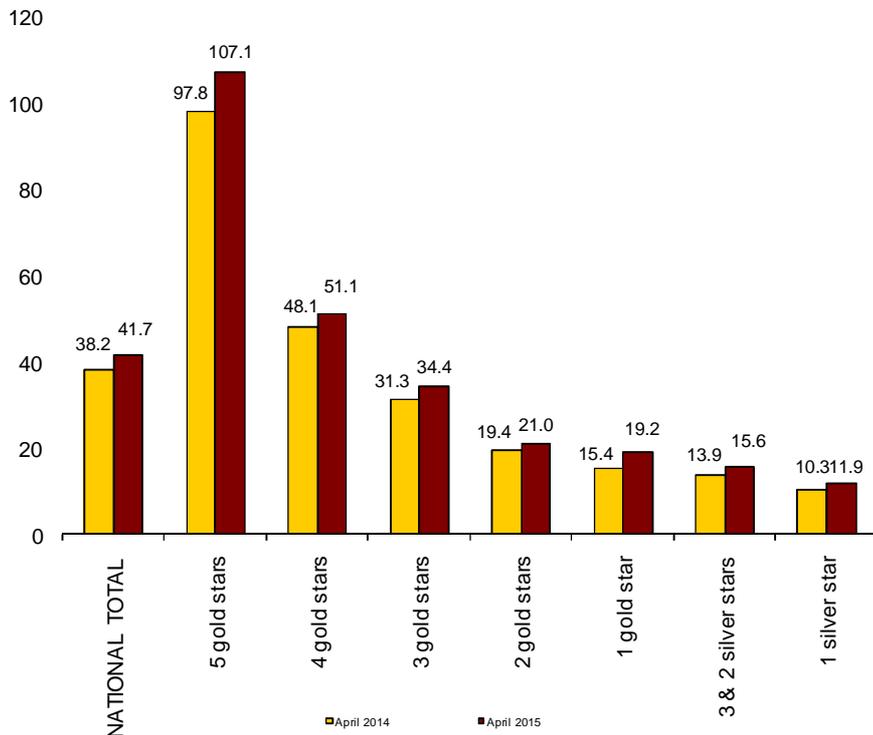
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 41.7 euros, with an increase of 9.2%.

By category, the average invoicing was 164.0 euros for five-star hotels, 75.5 euros for four-star hotels and 55.4 euros for three-star hotels. Income per available room for the same categories was 107.1, 51.1, and 34.4 euros, respectively.

Average daily rate (ADR) by hotel category in euros



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



For further information see INEbase-www.ine.es/en/

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Press Office: Telephone numbers: 91 583 93 63 / 94 08 – Fax: 91 583 90 87 - g-prensa@ine.es

Information Area: Telephone number: 91 583 91 00 – Fax: 91 583 91 58– www.ine.es/infoine/?L=1

Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

April 2015

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	7,637,074	4,020,034	3,617,040	23,090,326	9,526,045	13,564,281	3.02
HOTELS: Golden stars							
Five	427,471	132,452	295,019	1,461,818	274,878	1,186,940	3.42
Four	3,668,921	1,769,751	1,899,170	11,860,377	4,217,008	7,643,368	3.23
Three	2,036,505	1,145,873	890,632	6,557,228	3,091,215	3,466,013	3.22
Two	561,290	377,001	184,289	1,235,713	754,537	481,177	2.20
One	220,550	142,085	78,465	455,853	266,326	189,527	2.07
INNS: Silver stars							
Two and three	397,503	268,080	129,423	797,961	508,671	289,290	2.01
One	324,833	184,791	140,042	721,377	413,410	307,966	2.22
Annual rate	4.59	4.67	4.51	3.55	5.67	2.11	-1.00
Cumulative annual rate	5.83	7.09	4.27	3.51	7.65	0.87	-2.19

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	14,781	689,135	1,416,801	53.45	61.07	58.75	178,916
HOTELS: Golden stars							
Five	264	39,431	80,779	58.94	66.36	65.61	24,802
Four	2,148	302,038	642,904	60.50	67.74	67.75	89,536
Three	2,443	178,794	373,853	57.44	64.03	62.28	40,237
Two	1,929	54,287	104,588	38.79	50.36	42.69	8,535
One	1,172	24,255	46,937	32.17	41.62	36.43	3,785
INNS: Silver stars							
Two and three	3,013	45,798	85,952	30.74	40.36	34.45	6,246
One	3,812	44,532	81,790	29.25	36.54	34.18	5,775
Annual rate	-1.29	-0.10	0.35	3.21	4.72	6.03	2.55

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	17,078	90,884	88,673	719,258	74.34	75.45	79.80	7.48	5,815
Sur de Tenerife	31,507	174,105	131,111	1,331,426	73.90	76.40	78.14	7.11	12,148
Barcelona	126,488	537,878	256,708	1,479,704	72.21	77.06	81.95	2.61	12,934
Isla de Tenerife	65,365	202,312	269,510	1,536,245	70.28	73.24	74.07	6.75	15,236
Costa Blanca	202,019	131,879	792,225	616,670	69.48	78.96	70.66	4.22	8,160
Palma - Calvià	43,919	202,441	213,138	1,056,188	68.54	70.66	74.61	5.15	8,318
Isla de Fuerteventura	12,619	100,960	57,508	858,098	67.93	68.17	74.43	8.06	6,722
Sur de Gran Canaria	32,200	122,434	134,231	982,783	67.06	70.40	70.73	7.22	9,633

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

Isla de Mallorca	76,320	367,565	350,758	2,048,204	65.19	66.44	71.19	5.40	16,336
Costa del Sol	151,635	238,813	474,196	990,065	58.51	64.88	66.21	3.75	10,406
Isla de Gran Canaria	49,767	137,138	174,045	1,036,984	64.61	68.33	69.00	6.48	10,705
Costa Brava	123,431	155,582	339,434	529,348	49.79	55.71	52.00	3.11	5,676
Costa Barcelona	111,031	130,570	281,025	369,678	57.19	53.49	60.84	2.69	4,299
Costa Daurada	114,536	76,881	358,258	244,865	46.34	55.35	51.22	3.15	3,559
Costa de la Luz de Cádiz	95,747	58,680	206,648	208,745	38.02	45.94	44.00	2.69	4,156
Costa de Almería	66,021	15,073	251,806	51,477	38.69	46.54	51.75	3.74	2,078

Tourist site with a greater occupancy rate per month

Benidorm	110,828	74,573	550,655	426,002	79.66	89.13	79.00	5.27	4,811
Yaiza	6,741	47,210	42,784	360,516	78.69	82.40	86.48	7.48	3,071
Arona	7,980	51,837	31,386	403,453	74.98	77.06	78.03	7.27	3,072
Adeje	12,745	91,978	59,759	706,713	74.98	76.70	78.77	7.32	6,709
Barcelona	116,804	519,975	234,369	1,425,854	73.33	78.18	82.81	2.61	12,341
Teguise	3,637	19,208	19,020	152,931	73.19	72.57	78.21	7.53	1,149
Antigua	3,231	23,747	12,047	172,529	72.81	70.77	84.13	6.84	1,113
Palma	29,431	110,421	141,168	525,128	72.80	75.01	77.83	4.76	4,470
Córdoba	44,748	48,317	79,036	72,579	71.00	81.79	78.10	1.63	938
Sevilla	98,653	118,889	184,003	264,255	70.91	78.40	78.36	2.06	3,299

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

Madrid	391,796	391,746	695,009	903,316	64.37	76.46	75.71	2.04	11,189
San Bartolomé de Tirajana	26,018	89,553	111,422	704,521	66.06	68.43	69.39	7.06	7,603
Pájara	5,030	58,884	25,641	520,904	67.09	68.15	71.96	8.55	4,207
Calvià	7,572	82,373	25,714	488,819	60.59	63.55	71.63	5.72	3,122
Lloret de Mar	43,998	67,979	194,543	283,291	63.86	62.54	65.60	4.27	1,903
Torremolinos	27,794	47,953	134,221	252,378	68.21	70.57	71.31	5.10	2,199
Salou	57,787	40,869	226,226	141,043	54.94	62.28	58.51	3.72	1,562
Mogán	6,462	32,688	25,266	276,196	70.08	76.19	74.81	7.70	2,033
Valencia	75,857	73,390	130,010	167,930	55.96	66.21	63.10	2.00	1,920
Granada	72,828	83,231	140,399	151,436	67.87	82.06	72.31	1.87	1,639

* 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	7,637,074	100.00	23,090,326	100.00
Residents in Spain	4,020,034	52.64	9,526,045	41.26
Residents abroad	3,617,040	47.36	13,564,281	58.74
Total Residents abroad	3,617,040	100.00	13,564,281	100.00
Total Residents in E.U. (without Spain)	2,611,081	72.19	11,004,232	81.13
- Germany	555,968	15.37	3,076,795	22.68
- Austria	42,938	1.19	162,876	1.20
- Belgium	115,862	3.20	528,067	3.89
- Denmark	44,570	1.23	208,446	1.54
- Finland	34,013	0.94	150,137	1.11
- France	514,740	14.23	1,508,743	11.12
- Greece	9,670	0.27	25,876	0.19
- Ireland	54,874	1.52	228,790	1.69
- Italy	205,337	5.68	570,649	4.21
- Luxembourg	7,396	0.20	40,054	0.30
- Netherlands	127,433	3.52	491,713	3.63
- Poland	45,230	1.25	163,644	1.21
- Portugal	82,790	2.29	173,171	1.28
- United Kingdom	609,878	16.86	3,052,633	22.50
- Czech Republic	12,336	0.34	43,987	0.32
- Sweden	76,860	2.12	374,044	2.76
- Other EU countries*	71,185	1.97	204,606	1.51
Norway	44,213	1.22	221,580	1.63
Russia	37,410	1.03	114,938	0.85
Switzerland	93,493	2.58	365,981	2.70
Rest of Europe	70,253	1.94	215,576	1.59
Japan	44,911	1.24	77,028	0.57
United States of America	187,979	5.20	427,912	3.15
Rest of America	186,439	5.15	430,311	3.17
Africa	43,467	1.20	98,357	0.73
Other countries	297,794	8.23	608,367	4.49

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

Hotel Price Index (HPI). 2008 Base

April 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	94.0	2.8
Andalucía	93.1	2.9
Aragón	74.5	0.9
Asturias, Principado de	85.0	-0.3
Balears, Illes	107.2	6.3
Canarias	108.7	1.1
Cantabria	93.9	5.1
Castilla y León	90.5	2.9
Castilla - La Mancha	87.5	1.9
Cataluña	90.7	3.4
Comunitat Valenciana	95.1	2.5
Extremadura	84.4	1.1
Galicia	90.9	2.3
Madrid, Comunidad de	77.5	2.8
Murcia, Región de	79.2	1.1
Navarra, Comunidad Foral de	81.1	-1.4
País Vasco	89.5	2.6
Rioja, La	87.4	1.2
Ceuta	100.0	3.3
Melilla	96.8	-0.1

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	94.0	2.8
HOTELS: Gold stars		
Five	90.5	1.6
Fourth	93.4	2.7
Three	97.0	4.7
Two	89.9	0.4
One	97.3	3.0
HOSTALS: Silver stars		
Three and two	91.1	0.1
One	94.3	-1.9

Indicators on the Profitability of the Hotel Sector

April 2015

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	71.0	2.9	41.7	9.2
Andalucía	69.3	2.7	39.5	7.4
Aragón	52.9	-2.3	19.2	11.6
Asturias, Principado de	53.3	0.2	19.4	8.4
Balears, Illes	65.2	8.3	46.5	16.1
Canarias	83.4	-0.7	61.4	-1.2
Cantabria	58.3	7.5	21.4	11.1
Castilla y León	55.8	5.0	22.7	20.3
Castilla - La Mancha	57.1	1.3	19.1	6.3
Cataluña	81.3	6.6	49.4	14.7
Comunitat Valenciana	57.0	3.2	35.3	9.9
Extremadura	58.2	4.0	22.9	6.4
Galicia	51.7	2.6	16.5	10.6
Madrid, Comunidad de	76.1	2.6	53.6	15.2
Murcia, Región de	51.8	1.9	28.0	15.4
Navarra, Comunidad Foral de	58.0	-1.3	26.2	3.5
País Vasco	71.2	4.0	39.6	14.3
Rioja, La	61.1	-2.5	30.7	-7.3
Ceuta	67.6	-4.2	35.1	-15.1
Melilla	65.4	3.8	44.4	7.4

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	71.0	2.9	41.7	9.2
HOTELS: Gold stars				
Five	164.0	2.8	107.1	9.6
Four	75.5	1.7	51.1	6.4
Three	55.4	4.8	34.4	9.9
Two	49.0	-1.7	21.0	8.6
One	53.1	11.5	19.2	24.7
GUESTHOUSES: Silver stars				
Three and two	45.3	2.6	15.6	12.4
One	36.0	0.3	11.9	15.0

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room