

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

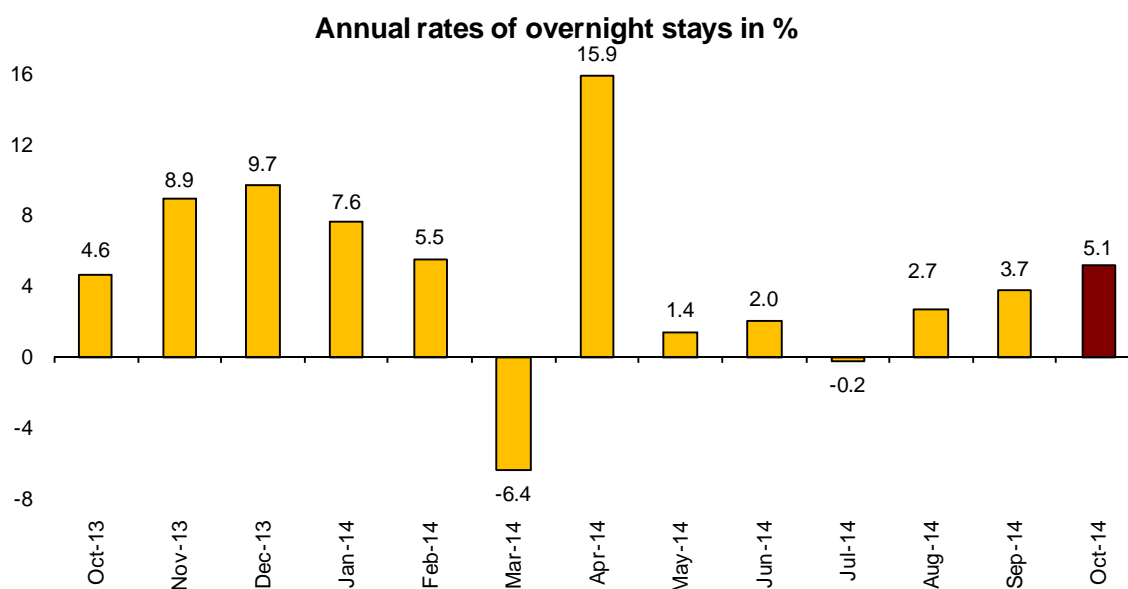
Overnight stays in hotel establishments registered an increase of 5.1% in October, as compared to the same month of 2013

Hotels invoice an average of 69.9 euros per available room, which means an annual increase of 3.0%

In October, a total of 26.2 million overnight stays were registered in hotel establishments, indicating an increase of 5.1% as compared with the same month of 2013. Overnight stays for residents in Spain increased 6.9% while those of non-residents did so by 4.4%.

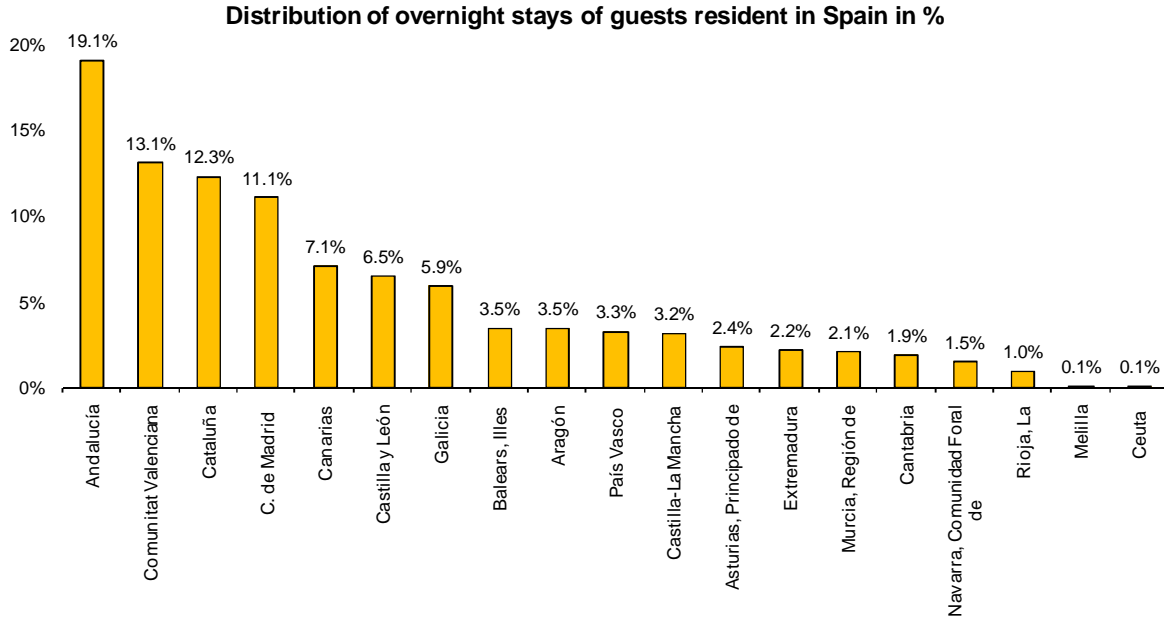
The average stay decreased 1.7%, as compared with October 2013, standing at 3.3 nights per guest.

In the first ten months of 2014, overnight stays increased 3.1% as compared with the same period of the previous year.

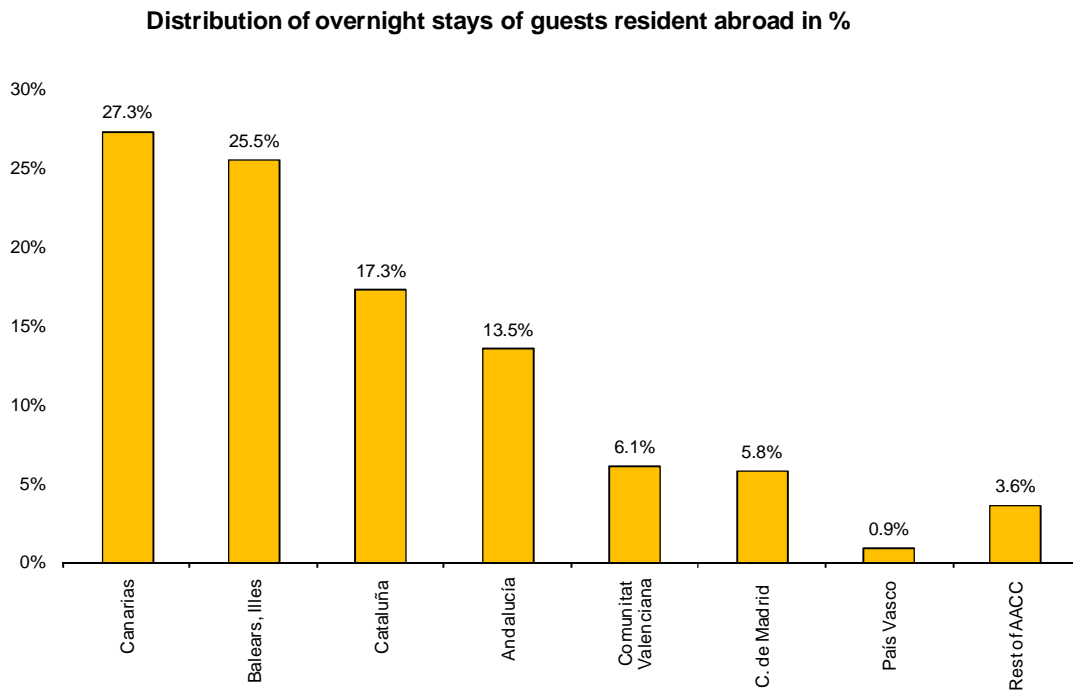


Main destinations

In October, 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 9.6%, 8.4%, 7.7% and 10.0%, respectively.



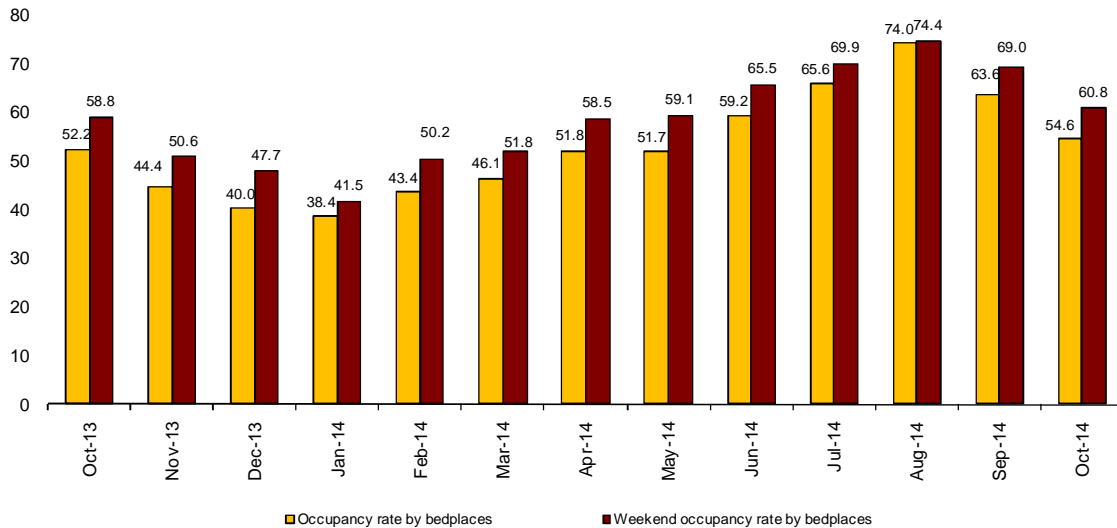
The main destination chosen by non-residents was Canarias, with 27.3% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 6.6% in its annual rate. The following destinations were Illes Balears (with 25.5% of the total and the same overnight stays figure than in October 2013) and Cataluña (17.3% of the total and a 2.3% increase of overnight stays).



Hotel Occupancy

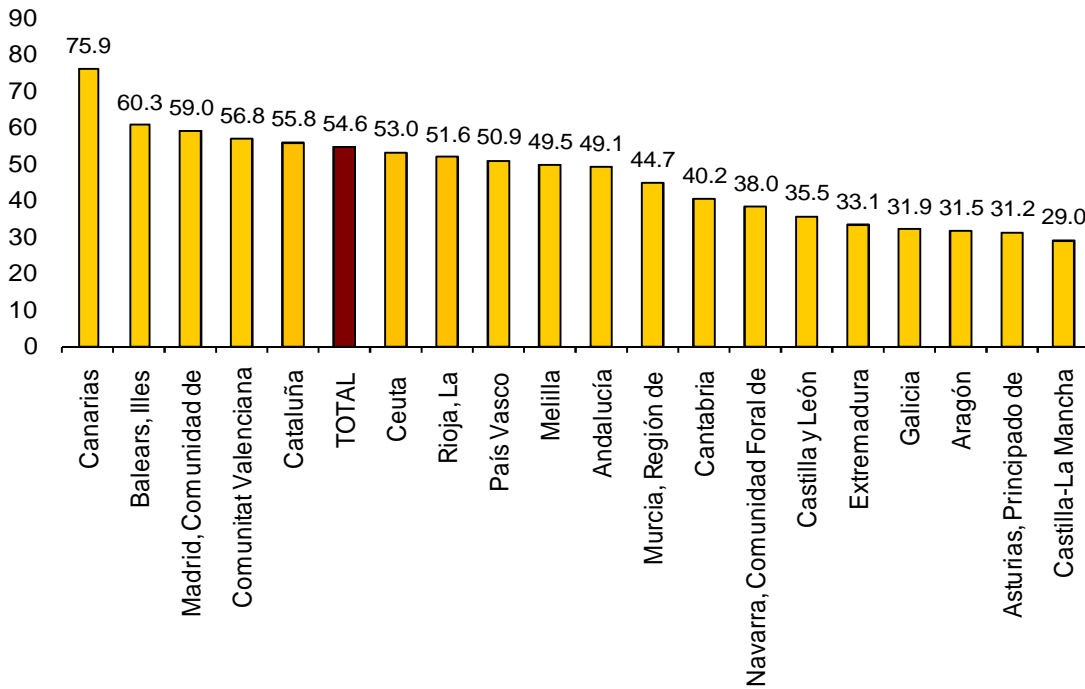
In October, 54.6% of the available bedplaces were occupied, indicating an annual increase of 4.5%. The weekend occupancy rate by bedplaces increased by 3.3%, standing at 60.8%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in October (75.9%), followed by Illes Balears (60.3%) and Comunidad de Madrid (59.0%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the South of Tenerife registered in October the highest occupancy rate, both by bedplaces (82.3%) and by weekend occupancy (81.2%). The island of Mallorca recorded the highest number of overnight stays, with more than 4.0 million.

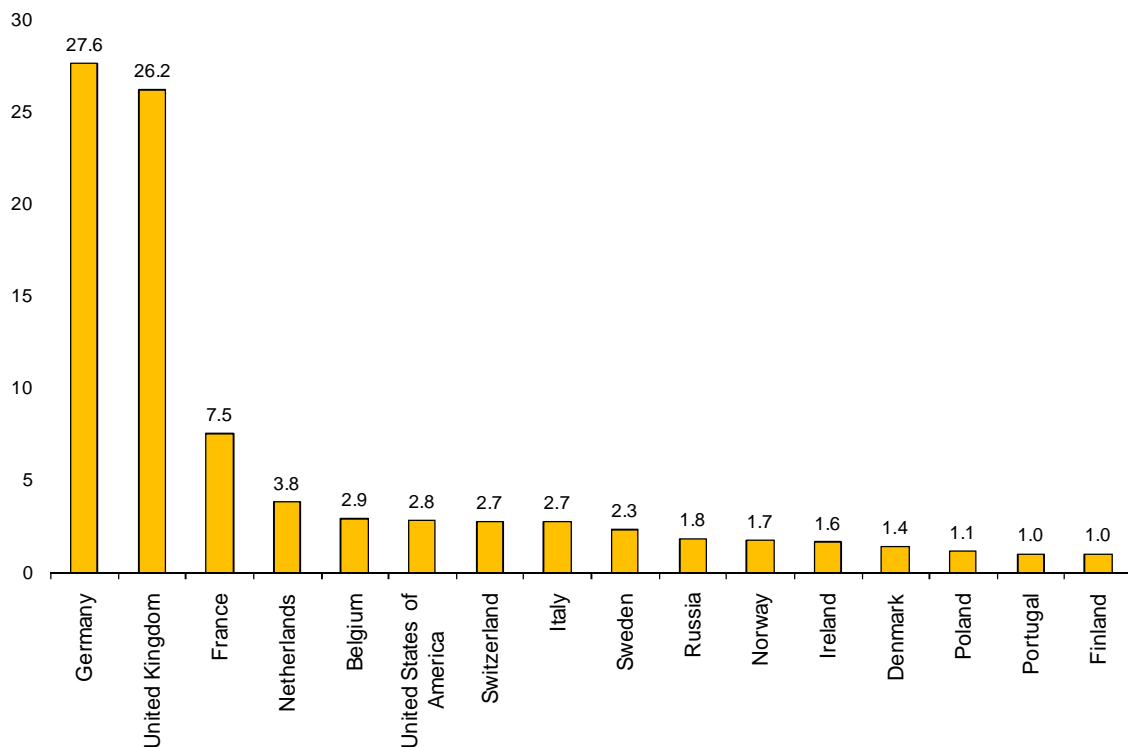
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and Benidorm. Arona reached the highest occupancy rate by bedplaces (86.9%) and Benidorm the highest weekend occupancy rate (86.7%).

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom concentrated 27.6% and 26.2%, respectively, of the total of overnight stays in hotel establishments by non-residents in October. The German market increased by 2.6% and the British one did so by 5.6%.

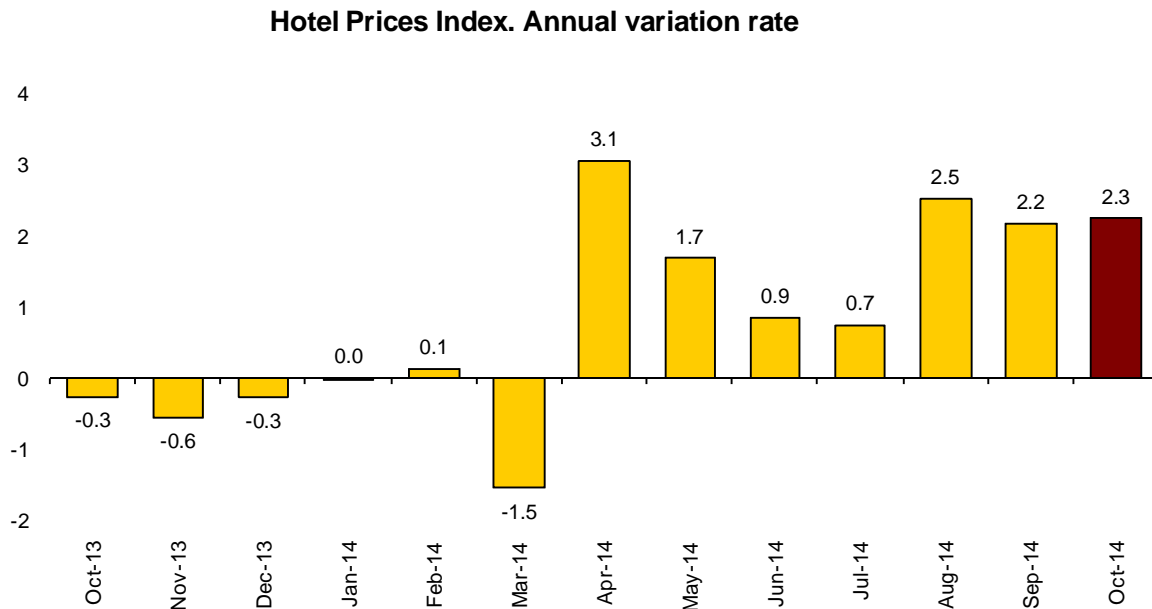
Overnight stays of guests from France, the Netherlands and Belgium (the following countries of origin) registered annual rates of 13.3%, 1.6% and 8.1%, respectively.

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 2.3% in October, that is, 0.1 points higher than that of the previous month and the 2.6 points over that registered in the previous year.



Canarias, Cataluña and Andalucía were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of October (they represented 70.6% of the total). Hotel prices increased 3.9% in the annual rate in Andalucía, 2.7% in Canarias, 1.8% in Cataluña, and 1.7% in Illes Balears.

By hotel category, the increases in hotel prices were registered in five-golden-star establishments (5.3%), three and two-silver-star hotels (2.8%), three-golden-star hotels (2.5%) and four-golden-star establishments (1.7%).

In turn, the prices registered a decrease in one-silver-star establishments (0.7%), two-golden-star hotels (0.3%) and one-olden-star hotels (0.2%).

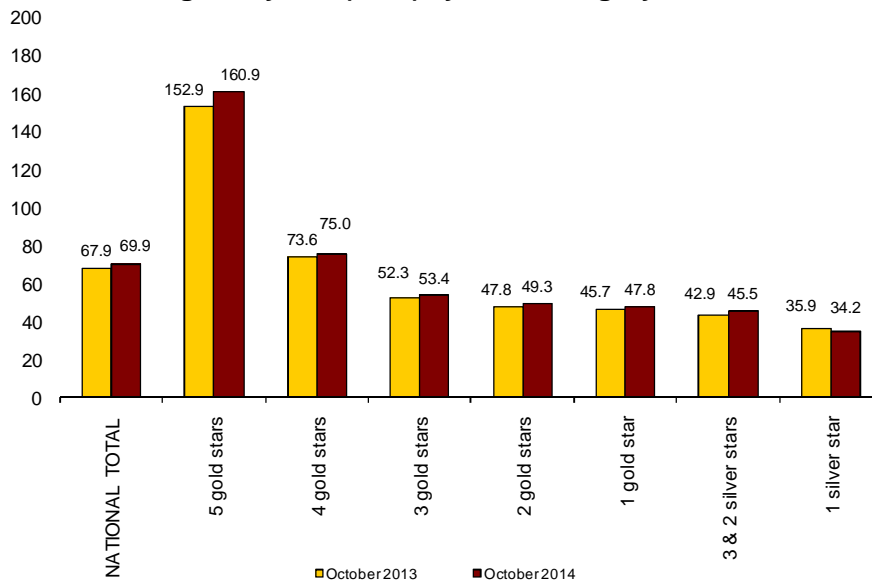
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in October was 69.9 euros, which represented an increase of 3.0% as compared with the same month of 2013.

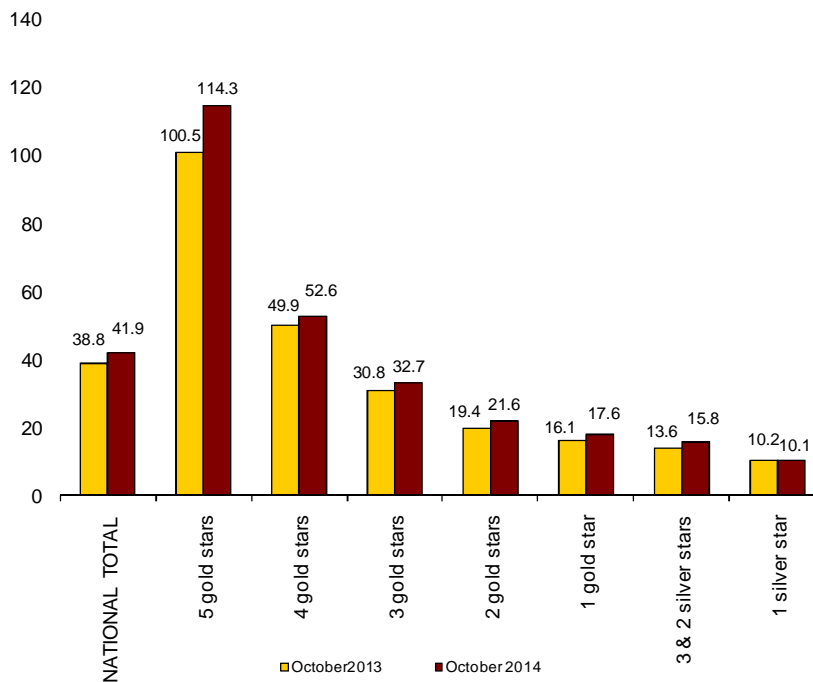
In turn, the daily average revenue per available room (RevPAR), that is conditioned by the occupancy registered in hotel establishments, reached 41.9 euros, with an increase of 8.0%.

By category, the average invoicing was 160.9 euros for five-star hotels, 75.0 euros for four-star hotels and 53.4 euros for three-star hotels. Income per available room for the same categories was 114.3, 52.6, and 32.7 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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