

23 November 2015

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

Overnight stays in hotel establishments register an increase of 7.5% in October, as compared to the same month of 2014

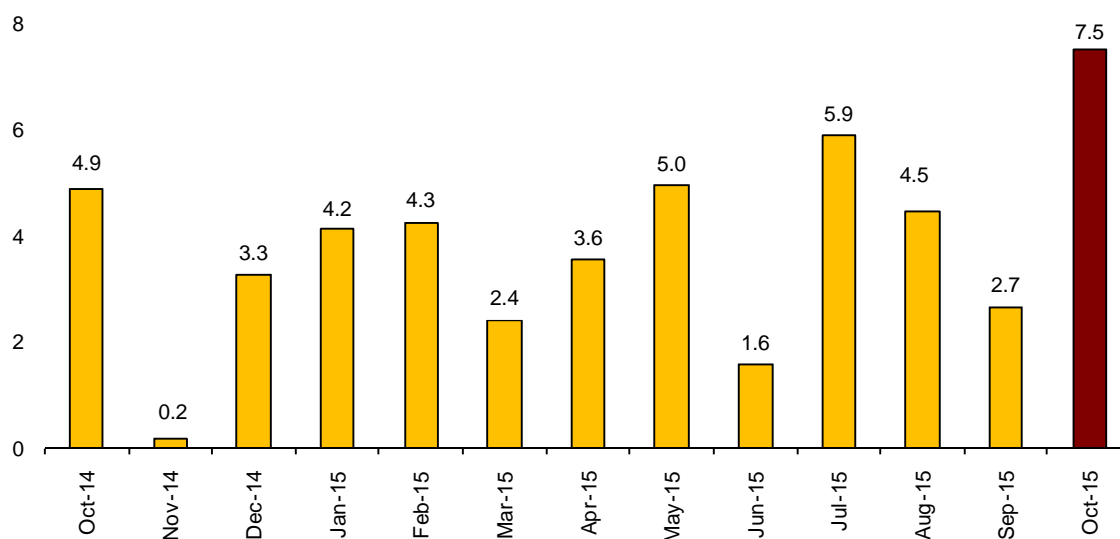
Hotels invoice an average of 74.9 euros per occupied room, which means an annual increase of 7.6%

In October, a total of 28.2 million overnight stays were registered in hotel establishments, 7.5% more than in the same month of 2014. Overnight stays for residents in Spain increased by 5.1% and those of non-residents did so by 8.6%.

The average stay decreased 1.3%, as compared to October 2014, standing at 3.2 nights per guest.

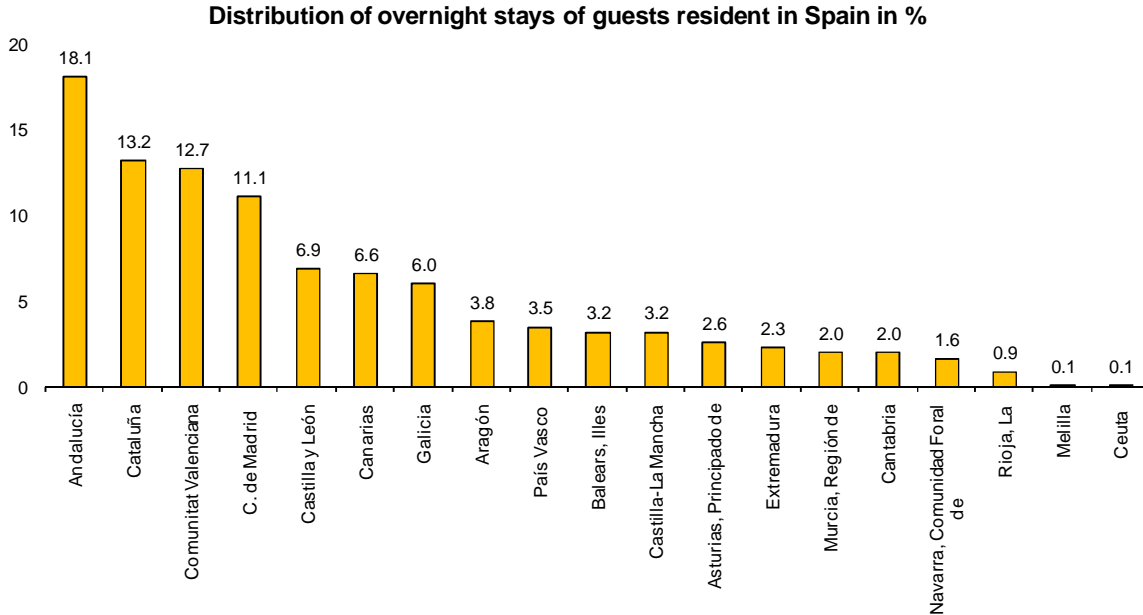
During the first ten months of 2015, overnight stays increased 4.2%, as compared to the same period of the previous year.

Annual rates of overnight stays in %

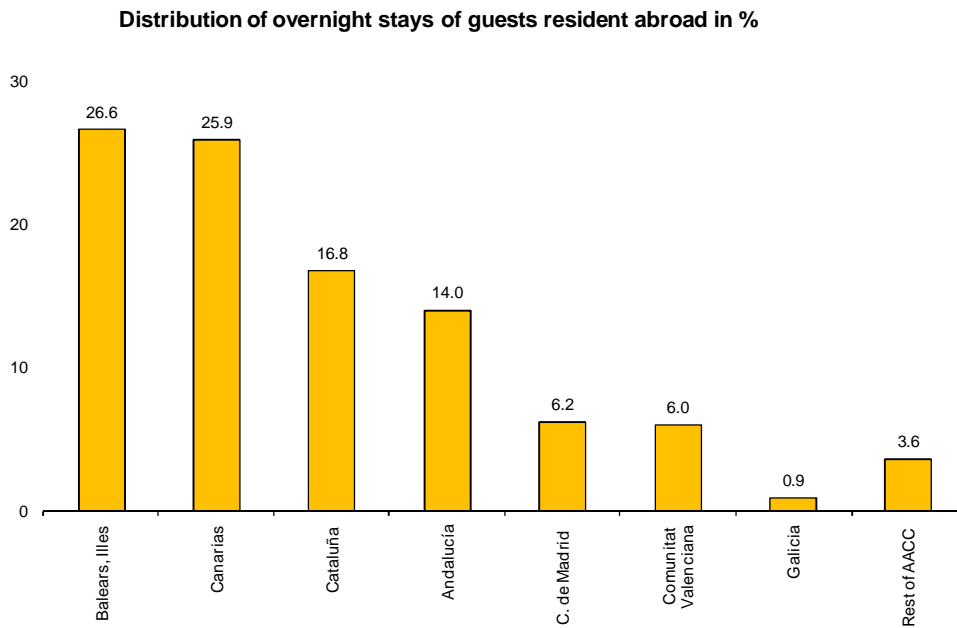


Main destinations

In October, Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 0.5%, 13.0%, 1.3% and 6.2%, respectively.



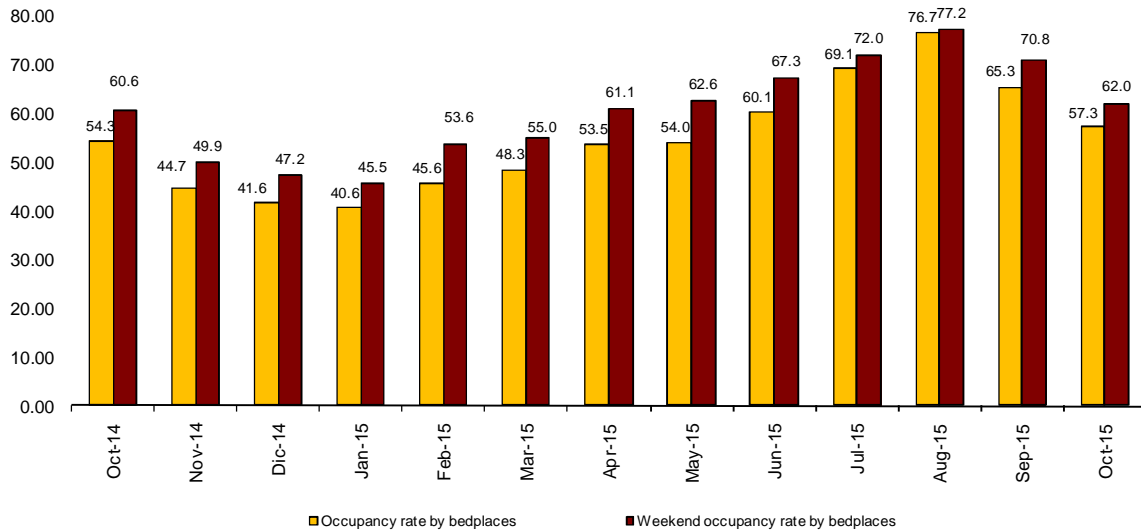
The main destination chosen by non-residents was Illes Balears, with 26.6% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 13.7% as compared to October 2014. The following destinations of non-residents were Canarias (25.9% of the total and an increase of 3.6% in overnight stays) and Cataluña (16.8% and an increase of 4.5% in overnight stays).



Hotel Occupancy

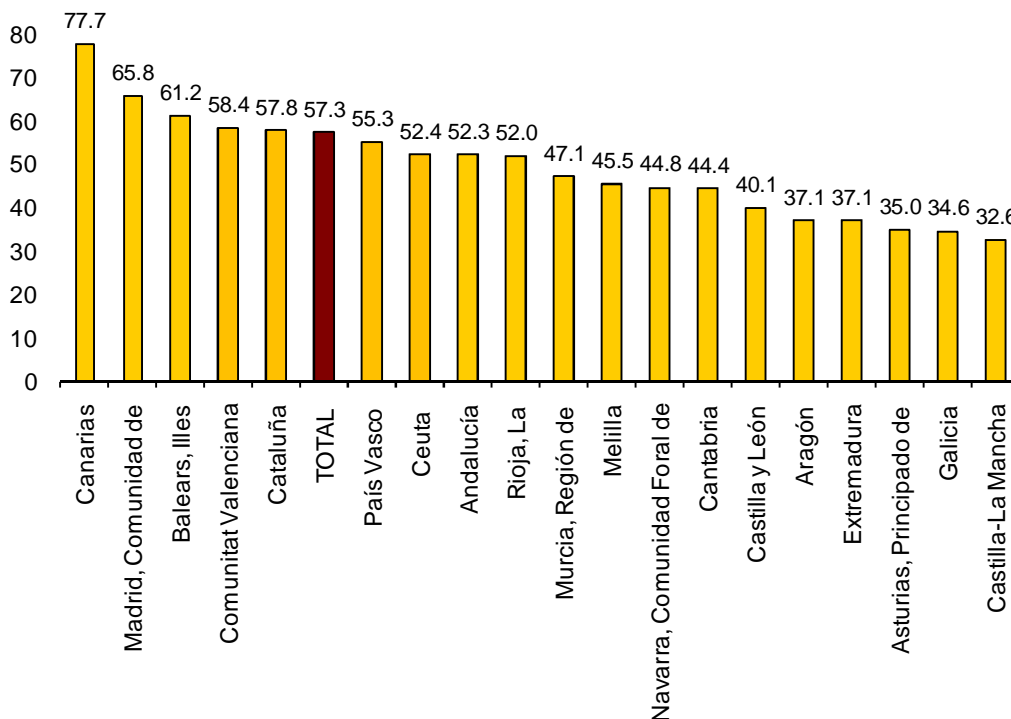
In October, 57.3% of the available bedplaces were occupied, indicating an annual increase of 5.5%. The weekend occupancy rate by bedplaces increased by 2.4%, standing at 62.0%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in October (77.7%), followed by Comunidad de Madrid (65.8%) and Illes Balears (61.2%).

Occupancy rate by bedplaces by Autonomous Community



By tourist area, the island of Fuerteventura registered the highest occupancy rate by bedplaces (82.6%), and recorded as well the highest weekend occupancy rate (81.7%). The island of Mallorca recorded the highest number of overnight stays, with more than 4.5 million.

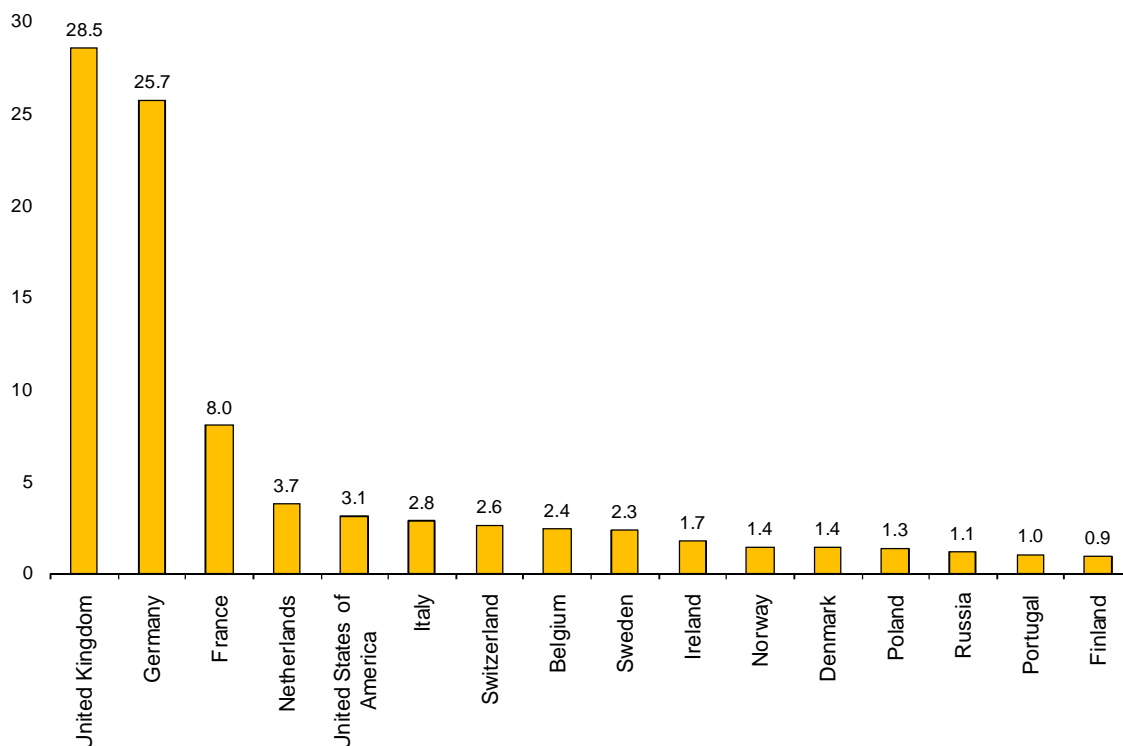
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and Benidorm. Pájara reached both the highest occupancy rate by bedplaces (88.8%) and the greatest weekend occupancy rate (85.3%).

Overnight stays according to the country of origin of the guests

Guests from United Kingdom and Germany concentrated 28.5% and 25.7%, respectively, of the total of overnight stays in hotel establishments by non-residents in October. The British market increased by 17.8%, and the German one did so by 1.9%.

Overnight stays of guests from France, Netherlands and United States of America (the following countries of origin) registered annual rates of 13.6%, 7.0% and 18.3%, respectively.

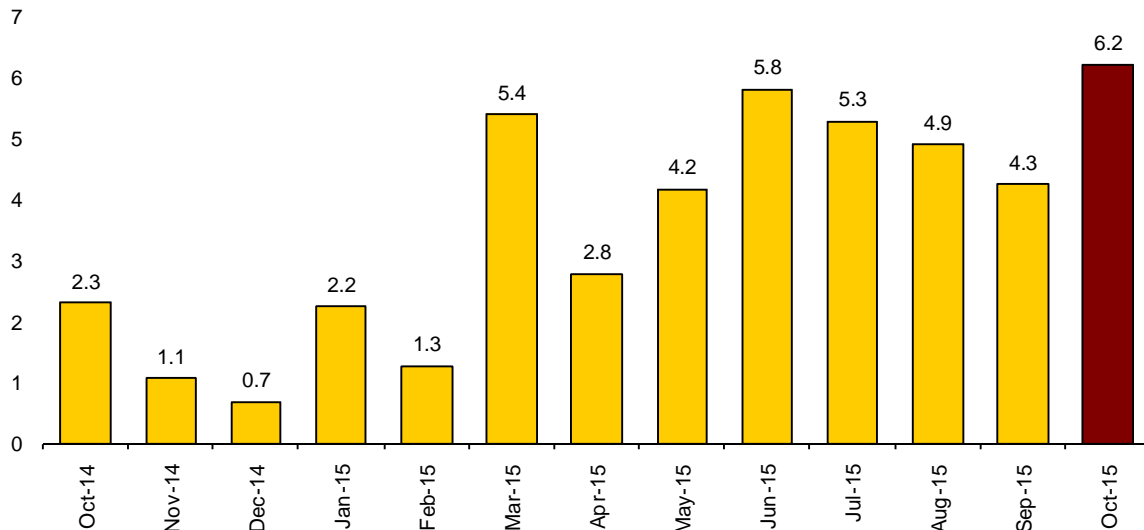
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 6.2% in October, that is, 1.9 points more than that of the previous month and 3.9 points over that registered in the previous year.

Hotel Prices Index. Annual variation rate



Canarias, Cataluña, Illes Balears 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 70.1% of the total). Hotel prices increased 9.0% in the annual rate in Cataluña, 7.6% in Illes Balears, and 5.2% in Andalucía and 4.0% in Canarias.

By hotel category, increase in hotel prices were registered in all of them. In three-golden-star establishments (7.8%), in five-golden-star establishments (7.6%), in one-golden-star establishments (6.3%), in four-golden-star establishments (5.7%), in one-silver-star establishments (3.2%), in three-silver-star and two-silver-star establishments (3.1%) and two-golden-star establishments (1.8%).

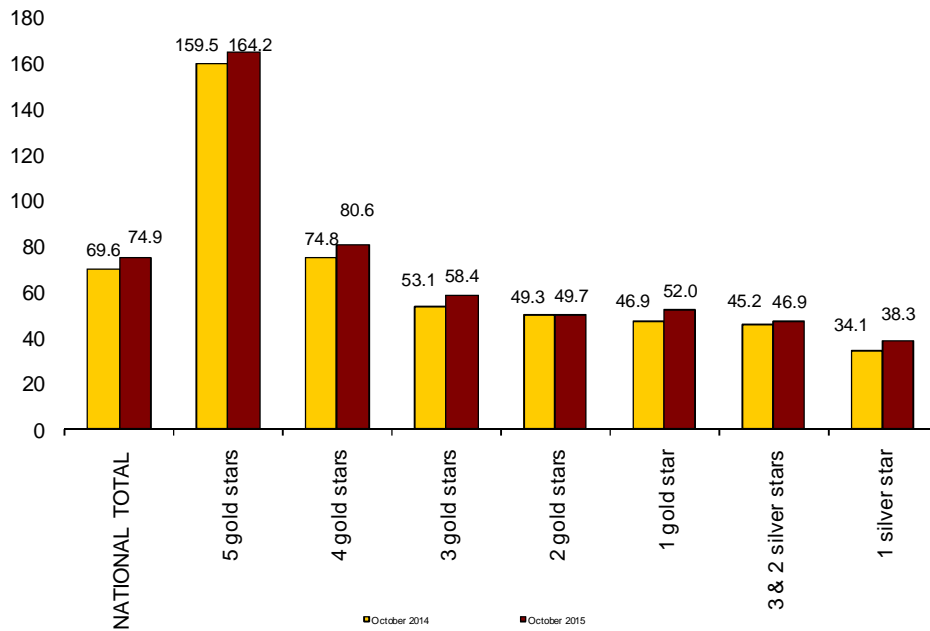
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in October was 74.9 euros, which represented an increase of 7.9% as compared to the same month of 2014.

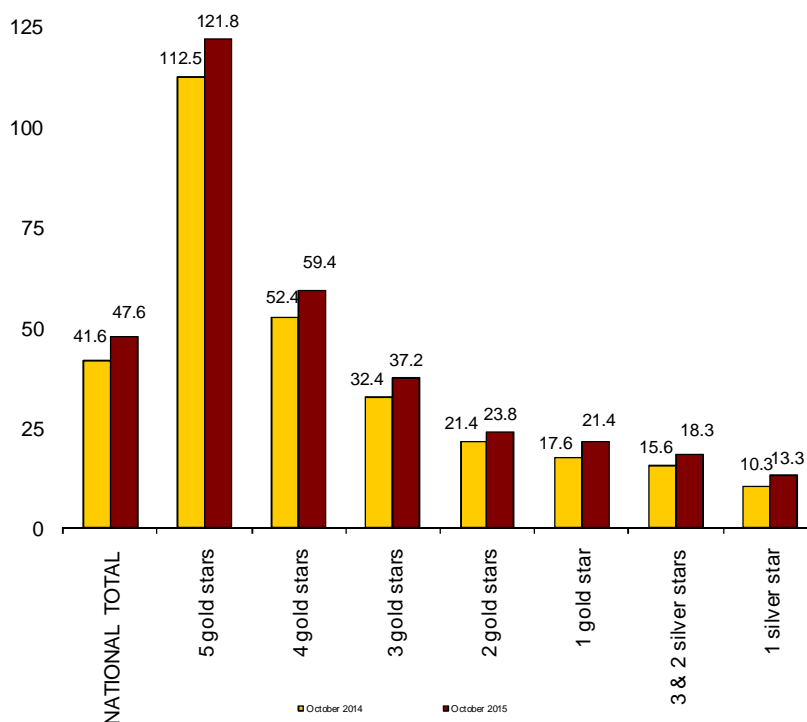
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 47.6 euros, with an increase of 14.5%.

By category, the average invoicing was 164.2 euros for five-star hotels, 80.6 euros for four-star hotels and 58.4 euros for three-star hotels. Income per available room for the same categories was 121.8, 59.4, and 37.2 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)

October 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	8,700,285	4,137,612	4,562,674	28,216,790	8,597,323	19,619,467	3.24
HOTELS: Golden stars							
Five	499,739	142,193	357,545	1,762,727	282,967	1,479,760	3.53
Four	4,229,117	1,868,532	2,360,586	14,511,147	3,802,495	10,708,652	3.43
Three	2,320,131	1,141,310	1,178,821	8,249,002	2,545,780	5,703,222	3.56
Two	599,336	377,786	221,550	1,453,020	769,171	683,849	2.42
One	264,265	161,349	102,917	526,644	286,902	239,741	1.99
INNS: Silver stars							
Two and three	436,623	274,607	162,016	921,592	524,791	396,802	2.11
One	351,074	171,835	179,239	792,657	385,216	407,441	2.26
Annual rate	8.91	8.85	8.96	7.52	5.13	8.60	-1.27
Cumulative annual rate	5.88	6.43	5.34	4.20	5.89	3.30	-1.59

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	15,015	757,514	1,561,736	57.30	62.02	64.09	204,014
HOTELS: Golden stars							
Five	280	42,282	87,838	63.83	68.05	73.85	27,712
Four	2,283	330,789	703,588	65.16	69.77	74.08	101,266
Three	2,645	210,896	440,880	59.40	62.68	65.35	48,519
Two	1,880	57,892	112,062	41.42	49.39	46.73	9,484
One	1,152	24,649	47,607	35.50	43.66	41.14	4,138
INNS: Silver stars							
Two and three	2,973	45,907	86,672	34.11	41.52	38.94	6,861
One	3,802	45,099	83,089	30.71	35.40	36.18	6,034
Annual rate	-1.11	0.93	1.43	5.52	2.38	6.88	4.32

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 Fuerteventura	11,247	129,870	53,679	1,109,021	82.61	81.72	89.59	8.24	7,259
Isla de Lanzarote	18,424	101,064	101,251	817,131	82.53	79.89	90.12	7.69	5,524
Sur de Tenerife	29,270	199,818	123,564	1,520,439	81.82	81.46	88.42	7.18	12,484
Sur de Gran Canaria	21,040	152,515	103,021	1,246,003	78.07	77.89	84.46	7.77	9,914
Isla de Tenerife	62,550	240,280	226,704	1,780,609	76.69	76.45	82.09	6.63	15,522
Isla de Gran Canaria	44,137	166,975	161,625	1,302,797	75.56	75.81	82.60	6.94	11,002
Barcelona	150,474	551,653	287,078	1,526,344	73.37	76.16	87.78	2.58	13,538
Costa Blanca	140,583	160,360	582,760	874,425	69.11	73.76	72.69	4.84	8,594

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

Isla de Mallorca	73,212	599,782	182,696	4,320,934	64.24	63.79	67.43	6.69	28,931
Costa del Sol	133,196	286,142	348,103	1,398,344	64.72	66.84	74.56	4.16	11,709
Palma - Calvià	35,527	255,327	101,248	1,541,000	63.72	65.31	68.90	5.65	11,388
Costa Brava	107,436	182,003	191,458	702,891	50.41	56.25	53.02	3.09	5,818
Costa Barcelona	125,994	171,765	251,293	598,054	60.41	62.32	70.89	2.85	4,920
Islas de Ibiza-Formentera	19,179	92,576	56,567	597,513	53.63	55.62	54.83	5.85	5,065
Costa Daurada	118,538	95,545	227,213	419,059	50.82	60.74	59.71	3.02	3,596
Costa de la Luz de Cádiz	90,270	72,410	204,629	338,182	48.56	54.38	58.15	3.34	4,959

Tourist site with a greater occupancy rate per month

Pájara	5,255	82,069	29,251	731,988	88.79	85.32	91.31	8.72	4,789
Tías	3,864	29,222	23,254	236,051	87.40	83.18	89.73	7.84	1,423
Arona	6,355	61,267	33,327	486,461	85.01	84.48	90.58	7.69	3,181
Yaiza	7,510	47,897	46,120	385,144	82.89	81.13	93.03	7.78	2,684
Adeje	10,729	105,871	51,310	798,060	82.87	82.32	89.59	7.28	6,639
Benidorm	66,953	95,439	416,081	626,867	81.55	83.90	83.87	6.42	5,099
Teguise	4,487	22,694	24,378	184,787	78.50	75.81	87.97	7.70	1,286
San Bartolomé de Tirajana	17,209	111,945	88,089	909,665	78.24	77.21	84.78	7.73	7,928
Mogán	3,743	40,389	15,800	335,013	77.23	79.66	82.78	7.95	1,981
Barcelona	137,149	529,053	261,093	1,473,078	74.48	77.23	88.54	2.60	12,942

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

Madrid	387,123	486,130	681,562	1,103,309	70.37	76.43	85.86	2.04	11,265
Calvià	9,882	113,888	20,916	783,549	61.79	59.23	67.57	6.50	4,968
Palma	22,333	128,758	67,949	682,716	66.43	72.97	72.45	4.97	5,729
Lloret de Mar	36,599	87,115	69,875	419,356	65.66	69.07	65.56	3.95	1,941
Sevilla	104,388	134,226	186,715	295,108	70.18	79.82	79.74	2.02	3,509
Sant Llorenç des Cardassar	2,339	53,737	5,230	442,778	64.33	65.20	69.98	7.99	2,785
Torremolinos	27,249	56,818	99,180	344,786	71.09	81.23	76.74	5.28	2,547
Alcúdia	1,694	42,541	4,464	382,282	63.83	54.45	64.83	8.74	1,988
Salou	38,204	49,792	77,885	272,551	54.93	64.89	65.63	3.98	1,636
Muro	3,243	40,998	5,579	339,074	73.12	76.92	72.95	7.79	2,207

* 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	8,700,285	100.00	28,216,790	100.00
Residents in Spain	4,137,612	47.56	8,597,323	30.47
Residents abroad	4,562,674	52.44	19,619,467	69.53
Total Residents abroad	4,562,674	100.00	19,619,467	100.00
Total Residents in E.U. (without Spain)	3,264,187	71.54	16,178,914	82.46
- Germany	779,659	17.09	5,043,665	25.71
- Austria	36,633	0.80	150,949	0.77
- Belgium	100,277	2.20	477,429	2.43
- Denmark	60,252	1.32	265,149	1.35
- Finland	40,163	0.88	169,247	0.86
- France	511,376	11.21	1,564,824	7.98
- Greece	9,590	0.21	23,798	0.12
- Ireland	74,364	1.63	331,475	1.69
- Italy	192,435	4.22	555,590	2.83
- Luxembourg	5,578	0.12	31,421	0.16
- Netherlands	168,065	3.68	726,776	3.70
- Poland	62,922	1.38	260,823	1.33
- Portugal	87,402	1.92	196,428	1.00
- United Kingdom	944,292	20.70	5,589,645	28.49
- Czech Republic	18,152	0.40	63,033	0.32
- Sweden	92,420	2.03	442,404	2.25
- Other EU countries*	80,603	1.77	286,256	1.46
Norway	59,889	1.31	282,923	1.44
Russia	50,601	1.11	205,941	1.05
Switzerland	109,479	2.40	512,879	2.61
Rest of Europe	80,482	1.76	267,763	1.36
Japan	57,978	1.27	103,744	0.53
United States of America	262,385	5.75	606,113	3.09
Rest of America	265,818	5.83	616,642	3.14
Africa	44,520	0.98	99,369	0.51
Other countries	367,335	8.05	745,180	3.80

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

Hotel Price Index (HPI). 2008 Base

October 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	97.8	6.2
Andalucía	94.8	5.2
Aragón	79.5	3.0
Asturias, Principado de	83.1	5.1
Balears, Illes	107.1	7.6
Canarias	106.8	4.0
Cantabria	92.5	2.3
Castilla y León	87.2	2.6
Castilla - La Mancha	87.0	3.9
Cataluña	101.9	9.0
Comunitat Valenciana	91.6	3.7
Extremadura	87.2	1.9
Galicia	91.4	3.6
Madrid, Comunidad de	87.3	10.1
Murcia, Región de	75.2	0.6
Navarra, Comunidad Foral de	84.1	1.8
País Vasco	97.7	3.1
Rioja, La	92.1	6.0
Ceuta	89.9	-0.5
Melilla	97.6	-0.3

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	97.8	6.2
HOTELS: Gold stars		
Five	95.5	7.6
Fourth	97.0	5.7
Three	100.5	7.8
Two	95.4	1.8
One	100.4	6.3
HOSTALS: Silver stars		
Three and two	94.7	3.1
One	94.9	3.2

Indicators on the Profitability of the Hotel Sector

October 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	74.9	7.6	47.6	14.5
Andalucía	70.8	6.8	43.5	10.3
Aragón	54.9	2.2	23.3	21.5
Asturias, Principado de	53.7	7.6	21.6	30.3
Balears, Illes	67.5	8.6	42.8	16.9
Canarias	85.4	6.6	71.4	9.6
Cantabria	59.0	3.3	29.0	21.8
Castilla y León	55.8	5.6	24.8	14.8
Castilla - La Mancha	56.4	5.9	21.1	17.0
Cataluña	89.8	10.6	60.2	17.7
Comunitat Valenciana	59.6	4.2	38.2	9.6
Extremadura	56.3	8.1	22.6	25.4
Galicia	54.5	5.4	21.5	13.1
Madrid, Comunidad de	87.3	8.9	70.8	22.7
Murcia, Región de	55.7	8.1	26.1	-0.4
Navarra, Comunidad Foral de	59.2	1.0	31.2	19.1
País Vasco	87.1	15.7	57.9	24.8
Rioja, La	62.5	1.8	36.3	5.7
Ceuta	71.2	2.5	35.1	-10.2
Melilla	65.8	0.4	39.2	-15.6

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	74.9	7.6	47.6	14.5
HOTELS: Gold stars				
Five	164.2	2.9	121.8	8.2
Four	80.6	7.7	59.4	13.2
Three	58.4	9.9	37.2	14.7
Two	49.7	0.7	23.8	11.4
One	52.0	11.0	21.4	21.0
GUESTHOUSES: Silver stars				
Three and two	46.9	3.9	18.3	17.5
One	38.3	12.4	13.3	28.9

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

Indicators on Profitability (ANNEX OF TABLES) - October 2015

23rd November 2015