

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

Overnight stays in hotel establishments register an increase of 5.1% in November, as compared with the same month of 2014

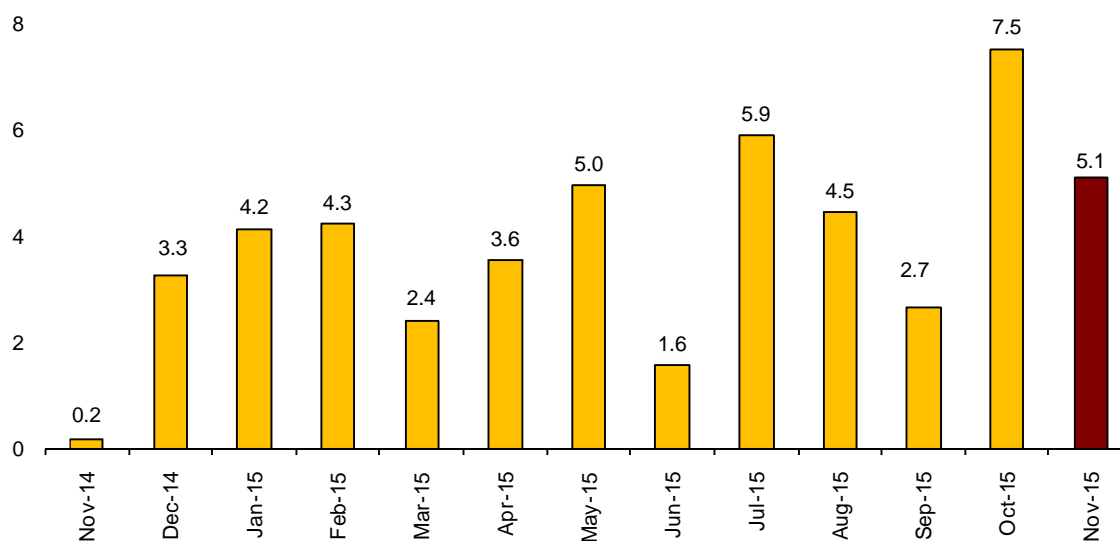
Hotels invoice an average of 75.2 euros per occupied room, which means an annual increase of 6.7%

In November, a total of 15.8 million overnight stays were registered in hotel establishments, that is, 5.1% more than in the same month of 2014. Overnight stays for residents in Spain decreased by 3.5% and those of non-residents increase by 10.9%.

The average stay decreased 2.2%, as compared with November 2014, standing at 2.9 overnight stays per guest.

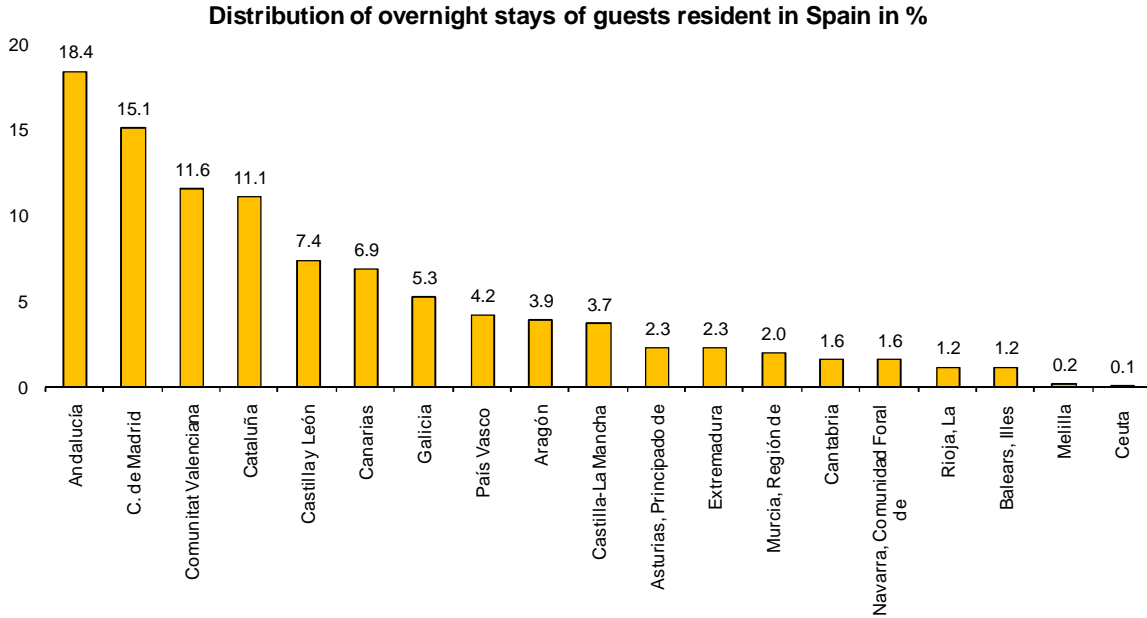
During the first 11 months of 2015, overnight stays increased 4.3%, as compared to the same period of the previous year.

Annual rates of overnight stays in %

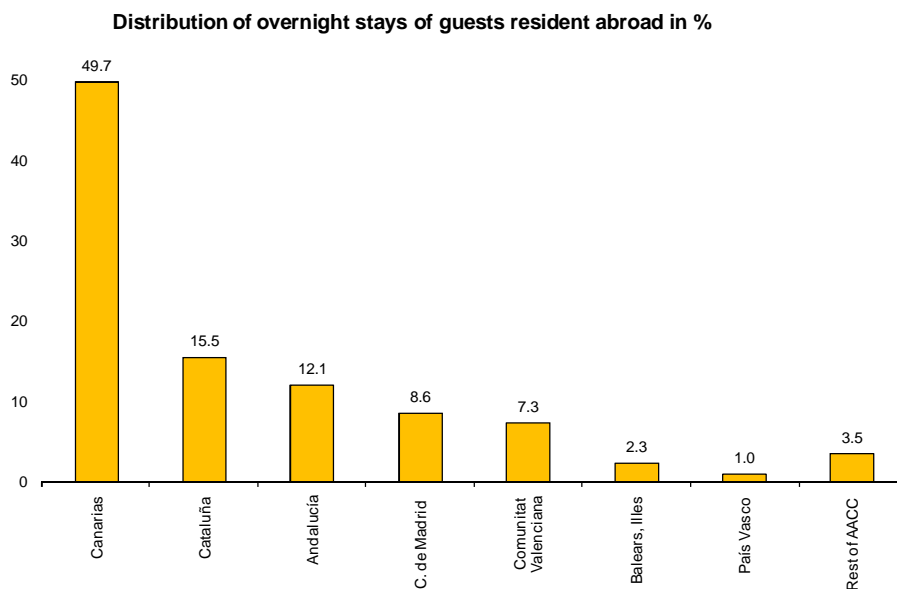


Destinations

In November, 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 -2.7%, 6.9%, -13.3% and -10.6%, respectively.

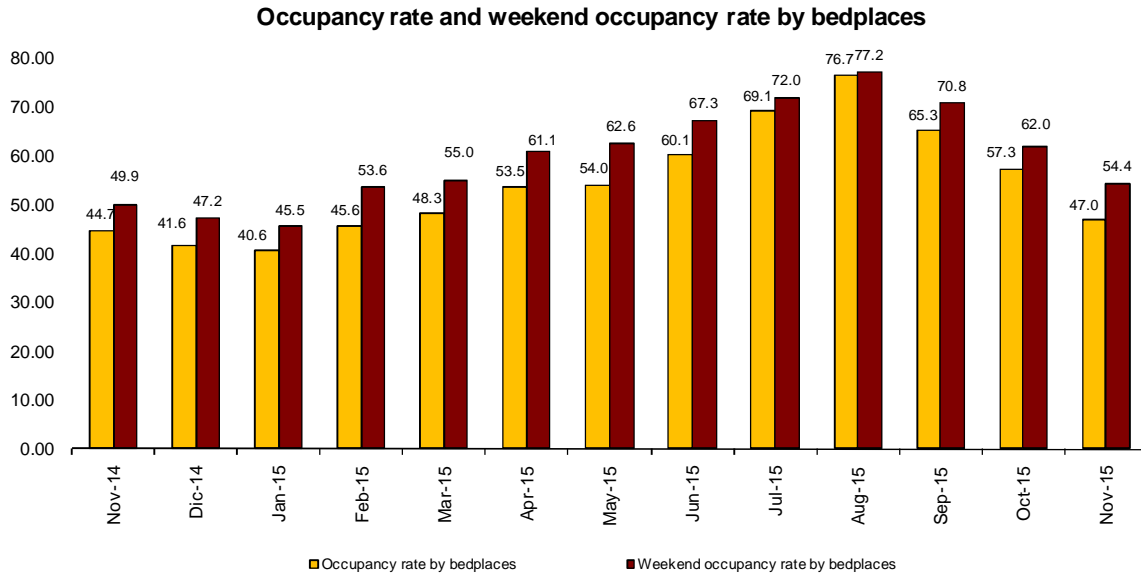


The main destination chosen by non-residents was Canarias, with 49.7% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 5.9% as compared with November 2014. The following destinations of non-residents were Cataluña (15.5% of the total and an increase of 19.3% in overnight stays) and Andalucía (12.1% and an increase of 23.1% in overnight stays).



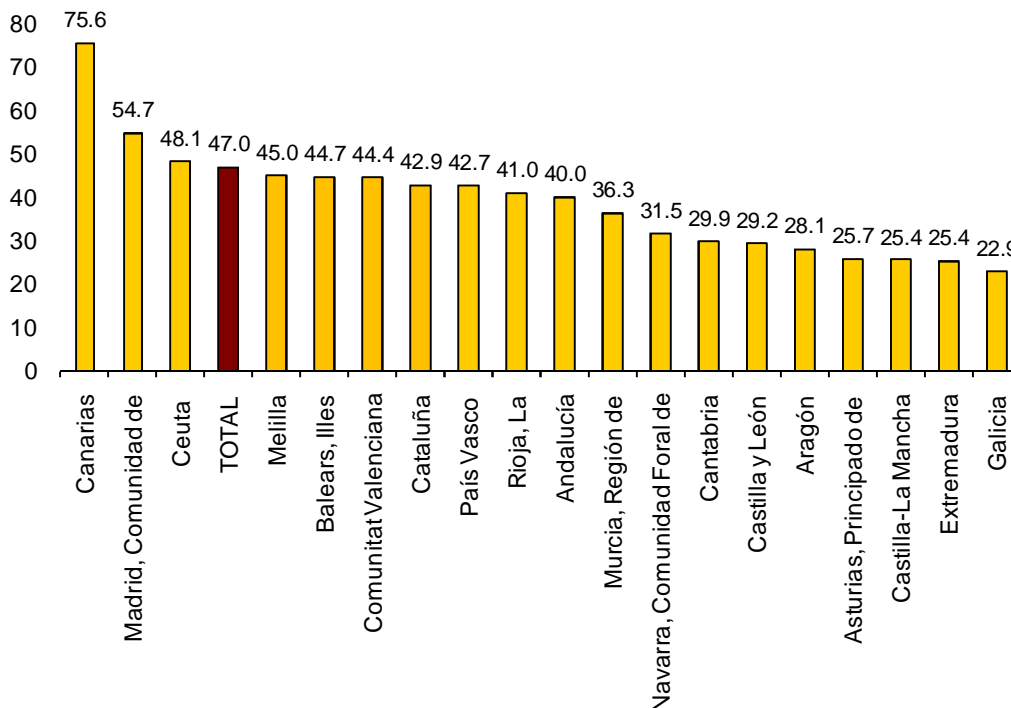
Hotel Occupancy

In November, 47.0% of the available bedplaces were occupied, indicating an annual increase of 5.1%. The weekend occupancy rate by bedplaces increased by 9.1%, standing at 54.4%.



Canarias registered the greatest occupancy rate by bedplaces in November (75.6%), followed by Comunidad de Madrid (54.7%) and Illes Balears (44.7%).

Occupancy rate by bedplaces by Automous Community



By tourist area, the South of Tenerife registered the highest occupancy rate by bedplaces (79.1%), whereas the South of Gran Canaria registered the highest weekend occupancy rate (80.0%). The island of Tenerife registered the highest number of overnight stays, with more than 1.9 million.

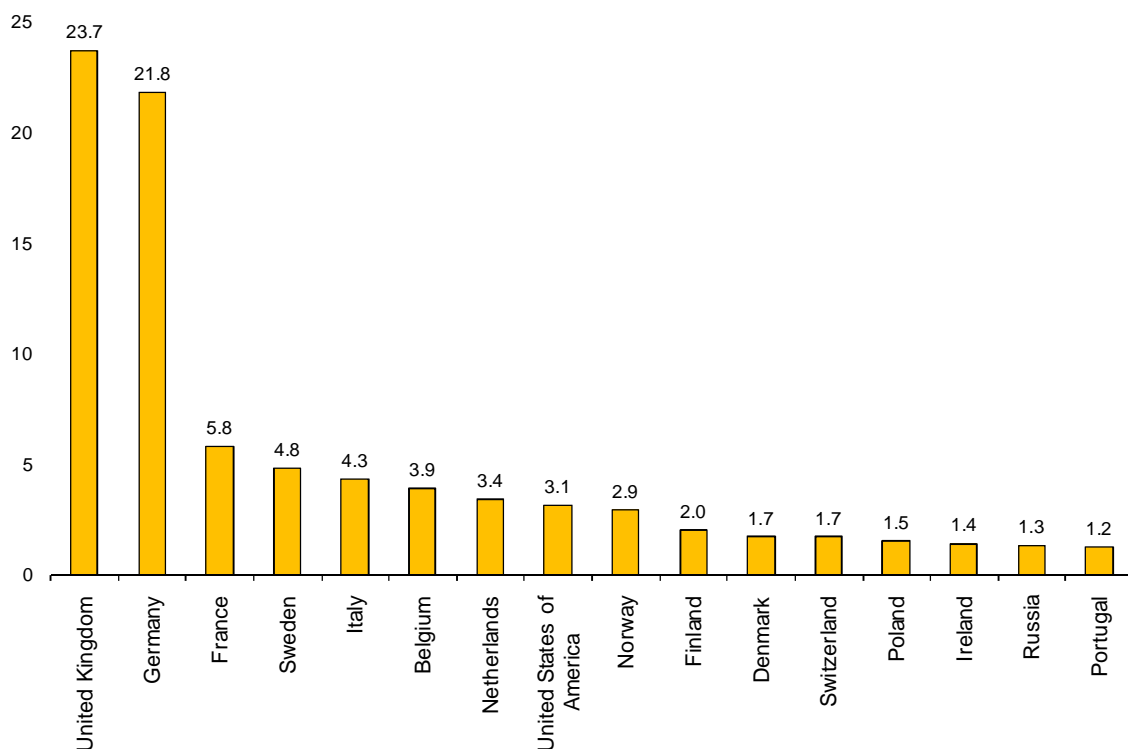
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Arona reached both the highest occupancy rate by bedplaces (83.4%) and the greatest weekend occupancy rate (83.4%).

Overnight stays according to the country of origin of the guests

Guests from United Kingdom and Germany concentrated 23.7% and 21.8%, respectively, of the total of overnight stays in hotel establishments by non-residents in November. The British market increased by 16.8%, and the German one did so by 0.4%.

Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of 7.7%, 4.0% and 24.2%, respectively.

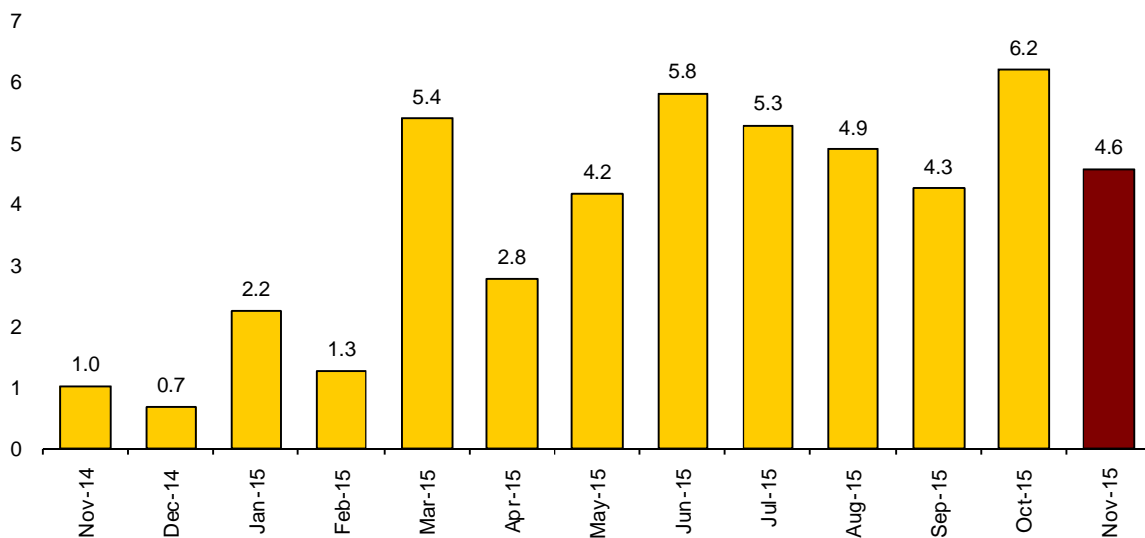
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 4.6% in November, that is, 1.6 points less than that of the previous month and 3.6 points over that registered in the previous year.

Hotel Prices Index. Annual variation rate



Canarias, Cataluña, Comunidad de Madrid and Andalucía were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of November (they represented 76.3% of the total). Hotel prices increased by 6.4% in the annual rate in Comunidad de Madrid, 5.0% in Andalucía, 4.9% in Canarias and 4.8% in Cataluña.

By hotel category, increase in hotel prices were registered in all of them. In one-golden-star establishments (5.3%), in four-golden-star establishments (5.1%), in three-golden-star establishments (4.5%), in five-golden-star establishments (3.9%), in two-golden-star establishments (2.6%), in three-silver-star, two-silver-star establishments and one-silver-star establishments (1.3% in all of them).

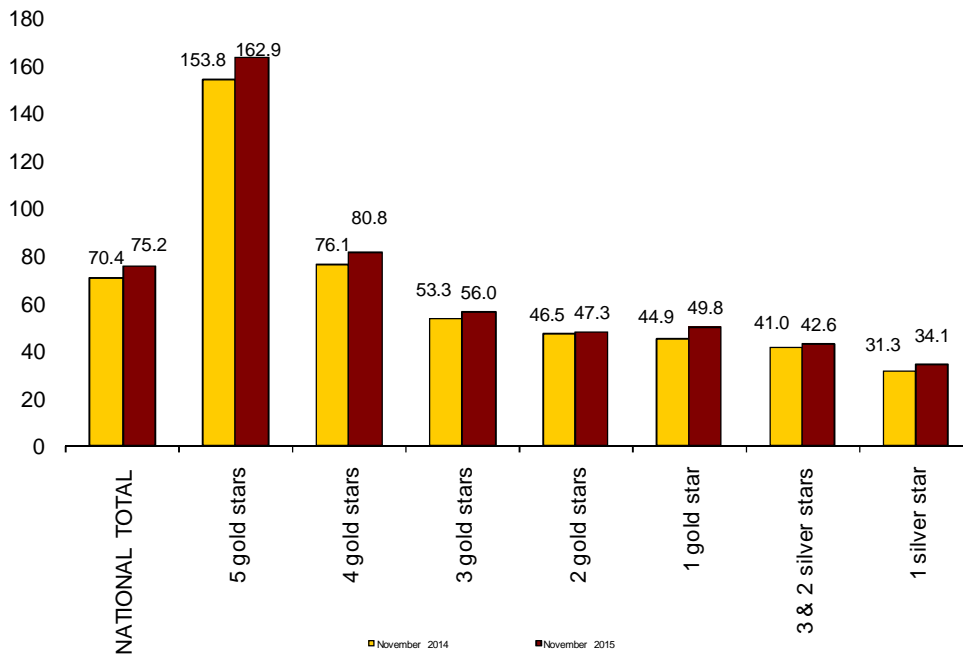
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in November was 75.2 euros, which represented an increase of 6.7% as compared with the same month of 2014.

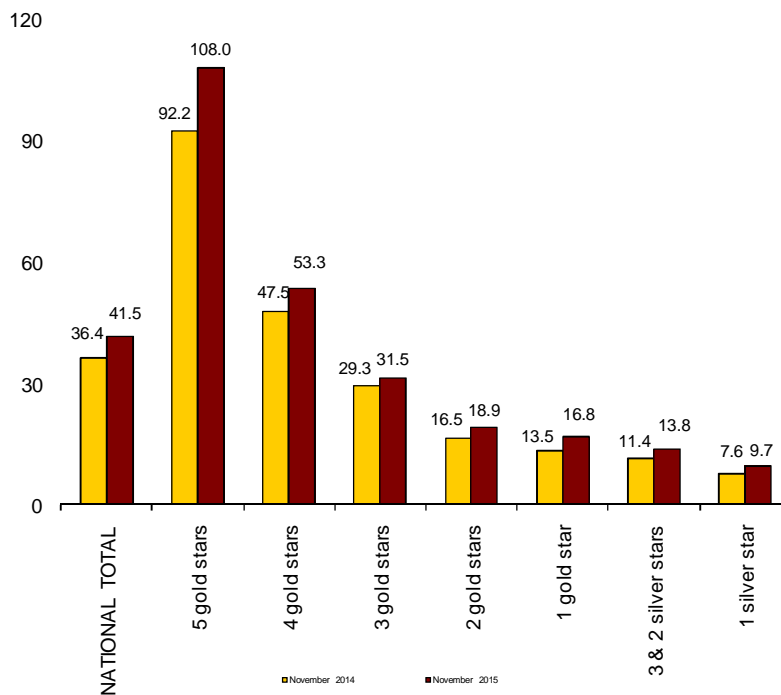
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 41.5 euros, with an increase of 14.0%.

By category, the average invoicing was 162.9 euros for five-star hotels, 80.8 euros for four-star hotels and 56.0 euros for three-star hotels. Income per available room for the same categories was 108.0, 53.3, and 31.5 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)

November 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	5,530,654	3,061,499	2,469,155	15,884,419	5,848,649	10,035,771	2.87
HOTELS: Golden stars							
Five	346,368	111,623	234,745	1,206,179	211,714	994,465	3.48
Four	2,725,747	1,388,290	1,337,457	8,390,937	2,557,872	5,833,066	3.08
Three	1,338,428	801,522	536,906	3,858,612	1,593,080	2,265,533	2.88
Two	410,859	286,738	124,121	916,912	546,379	370,532	2.23
One	179,495	123,150	56,345	351,827	213,638	138,189	1.96
INNS: Silver stars							
Two and three	308,078	218,357	89,720	630,160	413,097	217,062	2.05
One	221,679	131,819	89,860	529,793	312,868	216,925	2.39
Annual rate	7.52	3.34	13.19	5.10	-3.54	10.89	-2.24
Cumulative annual rate	5.99	6.21	5.76	4.25	5.31	3.67	-1.64

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	13,011	551,444	1,117,399	46.98	54.40	55.34	147,824
HOTELS: Golden stars							
Five	234	35,524	72,785	54.69	60.74	65.85	23,394
Four	1,812	238,751	498,164	55.62	62.82	66.61	73,082
Three	2,002	127,449	265,445	48.03	56.21	56.41	29,709
Two	1,648	46,537	89,193	34.05	43.55	39.68	7,327
One	1,022	21,595	41,679	28.03	35.51	33.54	3,467
INNS: Silver stars							
Two and three	2,734	41,071	76,933	27.16	34.23	31.72	5,869
One	3,561	40,518	73,200	24.07	29.43	29.84	4,977
Annual rate	-1.30	-0.89	-0.29	5.13	9.10	6.96	3.23

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 Tenerife	17,685	185,803	89,039	1,470,081	79.05	79.11	89.05	7.66	12,711
Sur de Gran Canaria	9,617	152,267	56,564	1,299,935	78.92	80.03	91.10	8.38	10,408
Isla de Gran Canaria	29,201	174,299	101,982	1,395,494	77.95	79.40	90.45	7.36	11,536
Isla de Tenerife	43,666	234,345	171,553	1,798,581	76.58	77.86	85.90	7.09	15,830
Isla de Fuerteventura	8,669	111,468	40,376	984,541	74.63	75.66	86.60	8.53	7,525
Isla de Lanzarote	14,498	89,768	72,258	720,868	73.11	71.49	86.46	7.61	5,864
Isla de La Gomera	1,794	5,864	3,666	33,968	72.90	75.49	79.30	4.91	403
Barcelona	135,978	431,712	247,484	1,157,058	58.40	63.98	71.95	2.47	13,207

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

Costa Blanca	115,194	95,530	357,056	529,334	51.81	60.43	56.85	4.21	6,677
Costa del Sol	94,338	129,796	194,656	609,808	49.03	51.24	59.62	3.59	7,559
Costa Barcelona	69,930	80,097	124,707	194,520	35.60	36.57	47.28	2.13	3,139
Isla de Mallorca	23,883	44,479	47,977	228,850	46.95	48.97	57.00	4.05	3,239
Costa Brava	62,011	47,554	96,842	155,577	32.16	42.45	36.03	2.30	2,530
Palma - Calvià	21,885	39,802	45,100	201,518	46.97	48.85	57.87	4.00	2,810
Costa de la Luz de Cádiz	49,245	23,256	104,337	93,517	34.83	39.55	43.34	2.73	2,213
Rías Baixas	47,313	7,723	98,387	15,580	22.99	28.37	27.79	2.07	1,875

Tourist site with a greater occupancy rate per month

Arona	4,306	56,934	22,096	467,912	83.35	83.39	90.86	8.00	3,224
San Bartolomé de Tirajana	7,953	112,165	48,439	949,141	78.94	80.58	90.77	8.30	8,255
Mogán	1,776	39,935	8,464	349,081	78.56	78.21	91.83	8.57	2,167
Pájara	3,651	67,042	19,783	642,060	78.38	79.45	87.76	9.36	4,795
Adeje	5,790	92,851	31,565	757,412	77.72	77.51	88.66	8.00	6,882
Puerto de La Cruz	12,581	33,917	55,087	271,851	75.36	79.37	79.92	7.03	2,260
Tías	2,658	27,395	12,298	223,636	75.09	72.10	85.65	7.85	1,687
Yaiza	5,777	38,876	34,809	320,813	73.12	72.19	87.66	7.96	2,752
Palmas de Gran Canaria (Las)	15,794	18,863	37,309	84,057	72.14	76.15	87.85	3.50	943
Teguise	2,952	21,830	17,071	165,738	71.37	69.95	86.74	7.38	1,288

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

Madrid	389,504	340,486	668,652	772,104	58.81	69.59	72.85	1.97	11,180
Barcelona	124,314	414,882	225,415	1,116,819	59.26	64.88	72.43	2.49	12,607
Benidorm	59,790	57,456	253,646	397,692	62.46	70.91	66.03	5.56	3,967
Sevilla	103,777	84,432	189,087	188,172	57.36	71.71	66.90	2.00	3,461
Valencia	72,834	56,721	126,402	136,159	47.94	61.91	60.00	2.03	1,876
Granada	67,296	53,076	119,494	89,332	49.18	71.96	54.72	1.73	1,630
Palma	20,391	31,982	41,706	155,081	48.93	51.16	59.20	3.76	2,167
Torremolinos	13,044	25,252	32,037	159,628	58.62	59.25	65.48	5.00	1,353
Oliva (La)	1,315	18,770	8,008	156,170	71.18	71.53	91.01	8.17	1,314
Málaga	41,655	38,563	70,308	90,255	55.40	63.91	69.37	2.00	1,290

* 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	5,530,654	100.00	15,884,419	100.00
Residents in Spain	3,061,499	55.36	5,848,649	36.82
Residents abroad	2,469,155	44.64	10,035,771	63.18
Total Residents abroad	2,469,155	100.00	10,035,771	100.00
Total Residents in E.U. (without Spain)	1,664,220	67.40	7,920,951	78.93
- Germany	333,298	13.50	2,187,084	21.79
- Austria	22,303	0.90	99,331	0.99
- Belgium	73,853	2.99	392,326	3.91
- Denmark	32,052	1.30	172,670	1.72
- Finland	31,829	1.29	198,478	1.98
- France	224,848	9.11	582,244	5.80
- Greece	7,584	0.31	21,019	0.21
- Ireland	31,762	1.29	137,157	1.37
- Italy	143,963	5.83	426,910	4.25
- Luxembourg	4,092	0.17	23,745	0.24
- Netherlands	83,074	3.36	344,968	3.44
- Poland	33,599	1.36	151,615	1.51
- Portugal	60,201	2.44	124,454	1.24
- United Kingdom	439,278	17.79	2,376,760	23.68
- Czech Republic	8,298	0.34	35,436	0.35
- Sweden	78,910	3.20	482,048	4.80
- Other EU countries*	55,276	2.24	164,707	1.64
Norway	47,026	1.90	295,213	2.94
Russia	34,567	1.40	126,373	1.26
Switzerland	42,743	1.73	171,756	1.71
Rest of Europe	57,863	2.34	164,425	1.64
Japan	54,306	2.20	92,348	0.92
United States of America	130,119	5.27	305,892	3.05
Rest of America	152,568	6.18	359,437	3.58
Africa	41,948	1.70	94,360	0.94
Other countries	243,796	9.87	505,016	5.03

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

Hotel Price Index (HPI). 2008 Base

November 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	95.5	4.6
Andalucía	94.3	5.0
Aragón	79.1	3.4
Asturias, Principado de	84.2	4.7
Balears, Illes	98.2	0.6
Canarias	111.9	4.9
Cantabria	86.6	4.4
Castilla y León	88.0	3.0
Castilla - La Mancha	87.5	3.7
Cataluña	88.7	4.8
Comunitat Valenciana	94.0	3.5
Extremadura	90.6	2.9
Galicia	88.2	0.7
Madrid, Comunidad de	81.8	6.4
Murcia, Región de	78.5	3.0
Navarra, Comunidad Foral de	81.3	2.8
País Vasco	92.3	1.9
Rioja, La	87.4	0.8
Ceuta	92.1	-5.0
Melilla	96.7	0.1

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	95.5	4.6
HOTELS: Gold stars		
Five	94.2	3.9
Fourth	96.6	5.1
Three	93.8	4.5
Two	91.3	2.6
One	94.6	5.3
HOSTALS: Silver stars		
Three and two	90.8	1.3
One	94.9	1.3

Indicators on the Profitability of the Hotel Sector

November 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	75.2	6.7	41.5	14.0
Andalucía	61.9	6.8	29.2	17.2
Aragón	49.6	1.4	16.9	18.0
Asturias, Principado de	50.2	5.3	15.9	19.4
Balears, Illes	70.5	7.0	35.9	6.9
Canarias	90.8	6.5	79.5	9.6
Cantabria	57.6	5.4	17.7	13.0
Castilla y León	54.1	5.9	18.0	11.8
Castilla - La Mancha	53.2	4.3	16.6	11.5
Cataluña	87.5	7.2	47.6	18.7
Comunitat Valenciana	56.0	6.9	28.7	7.5
Extremadura	55.3	7.1	16.1	10.1
Galicia	51.2	4.0	14.4	7.6
Madrid, Comunidad de	78.8	6.6	54.9	18.7
Murcia, Región de	53.3	7.7	23.1	8.5
Navarra, Comunidad Foral de	59.6	2.3	23.5	9.3
País Vasco	70.3	3.4	36.9	11.7
Rioja, La	58.7	-2.4	28.6	-0.4
Ceuta	67.5	-4.8	34.9	-13.0
Melilla	64.9	-0.1	39.7	-11.2

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	75.2	6.7	41.5	14.0
HOTELS: Gold stars				
Five	162.9	5.9	108.0	17.0
Four	80.8	6.2	53.3	12.2
Three	56.0	5.1	31.5	7.5
Two	47.3	1.7	18.9	14.8
One	49.8	11.1	16.8	24.7
GUESTHOUSES: Silver stars				
Three and two	42.6	3.9	13.8	21.4
One	34.1	8.9	9.7	26.4

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room

Indicators on Profitability (ANNEX OF TABLES) - November 2015

22nd December 2015