

23 February 2015

(Update 26 February 2015)

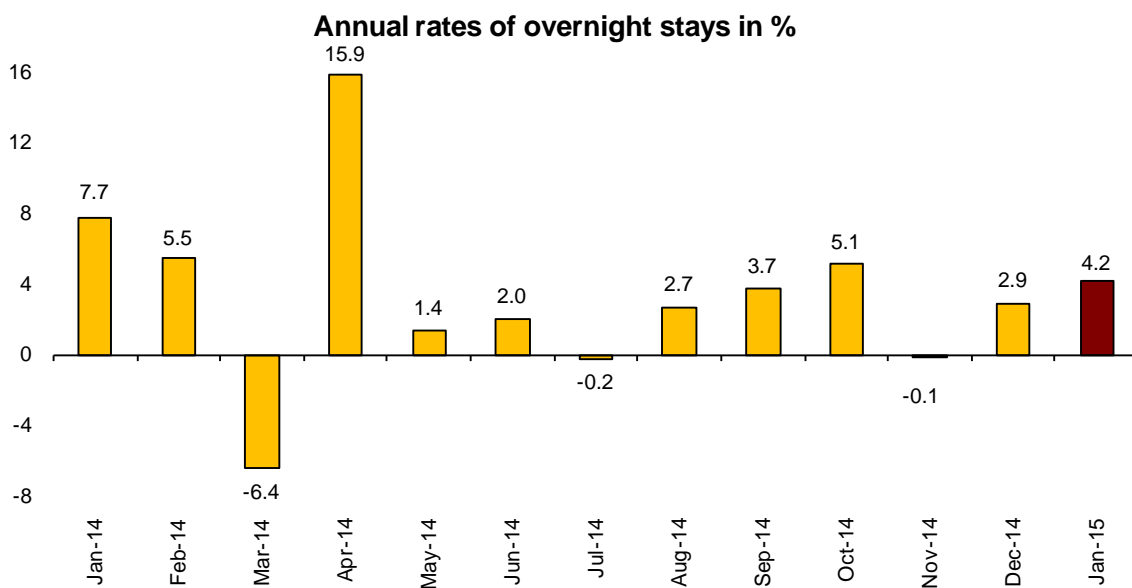
Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
January 2015. *Provisional data*

Overnight stays in hotel establishments register an increase of 4.2% in January, as compared to the same month of 2014

Hotels invoice an average of 72.7 euros per available room, which means an annual increase of 4.1%

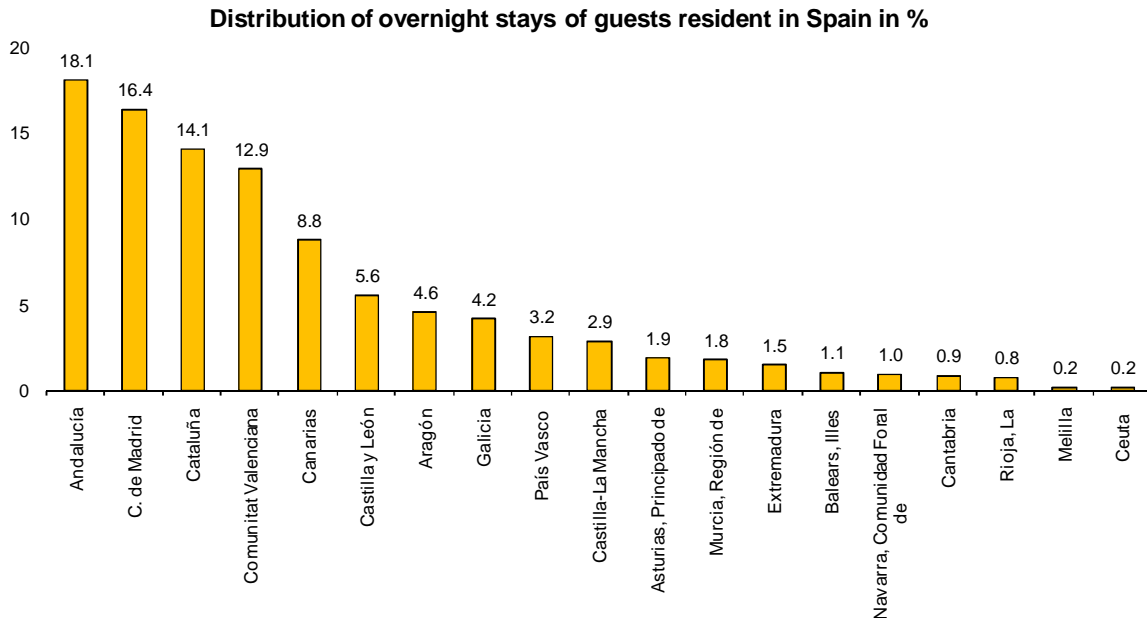
In January, a total of 13.3 million overnight stays were registered in hotel establishments, 4.2% more than in the same month of 2014. Overnight stays for residents in Spain increased by 9.8% and those of non-residents did so by 1.0%.

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

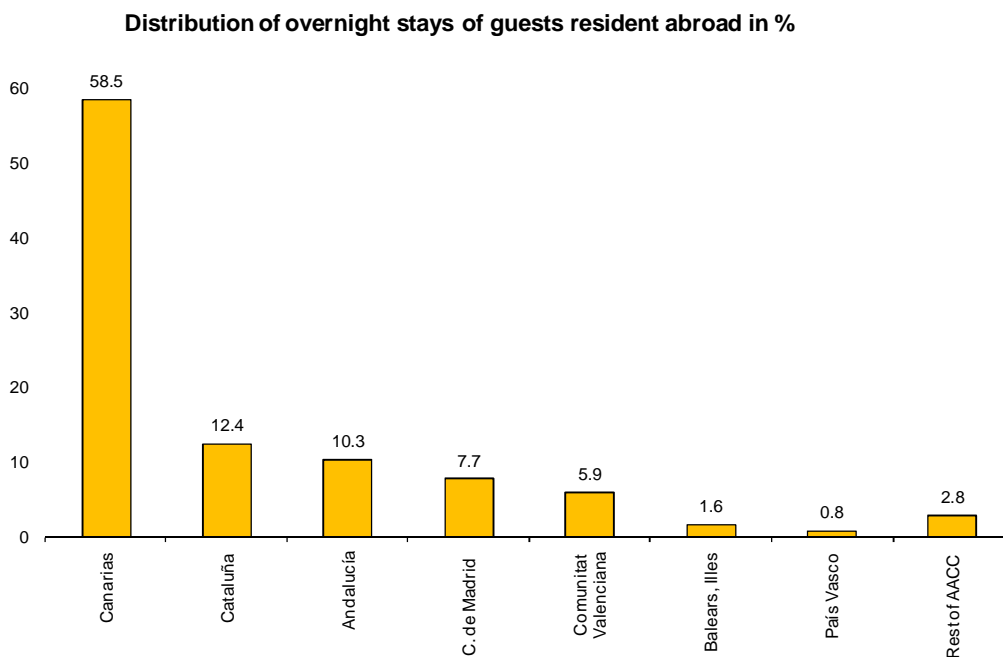


Main destinations

In January, Comunidad de Madrid, Cataluña and Comunitat Valenciana were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 11.3%, 20.3%, 14.6% and 15.1%, respectively.



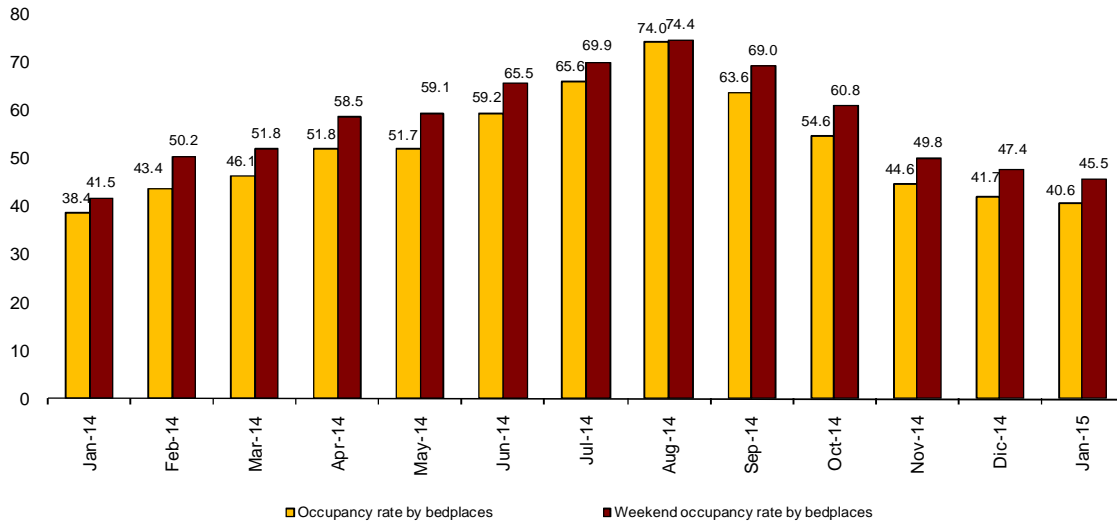
The main destination chosen by non-residents was Canarias, with 58.5% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 2.5% as compared to January 2014. The following destinations of non-residents were Cataluña (12.4% of the total) and Andalucía (10.3%). Overnight stays of non-residents in these communities increased by 9.4% and 3.5%, respectively.



Hotel Occupancy

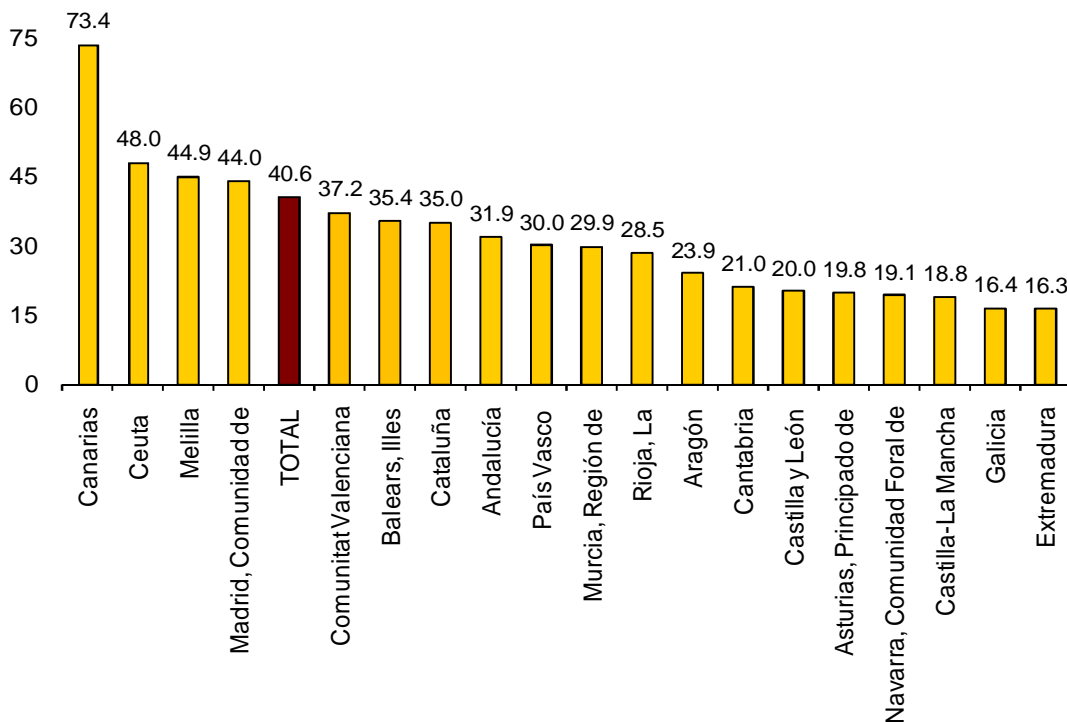
In January, 40.6% of the available bedplaces were occupied, indicating an annual increase of 5.5%. The weekend occupancy rate by bedplaces increased by 9.5%, standing at 45.5%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in January (73.4%), followed by Comunidad de Madrid (44.0%) and Comunitat Valenciana (37.2%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the South of Tenerife registered the highest occupancy rate by bedplaces (79.2%), while La Gomera did so with the highest weekend occupancy rate (80.2%). The island of Tenerife recorded the highest number of overnight stays, with more than two million.

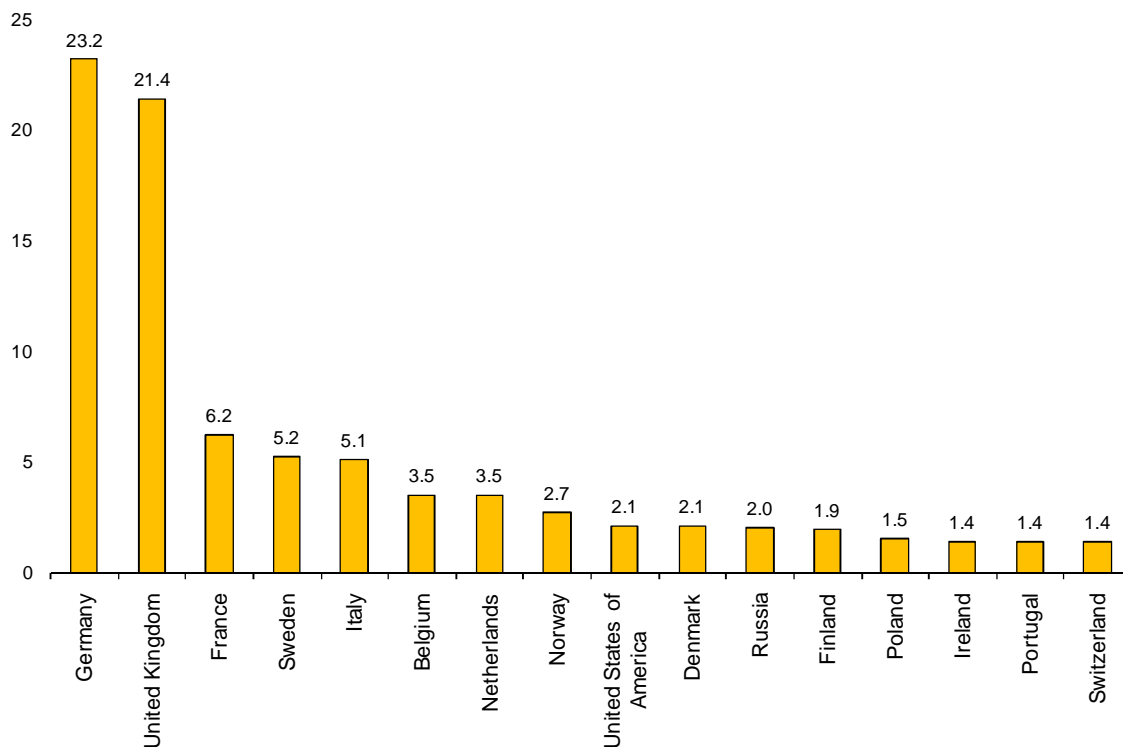
The tourist sites with the highest number of overnight stays were Madrid, San Bartolomé de Tirajana and Barcelona. Arona reached the highest occupancy rate by bedplaces (83.4%) and Mogán recorded the greatest weekend occupancy rate (82.5%).

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom concentrated 23.2% and 21.4%, respectively, of the total of overnight stays in hotel establishments by non-residents in January. The German market decreased by 5.2%, while the British one increased by 6.0%.

Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of 23.9%, -2.4% and 18.9%, respectively.

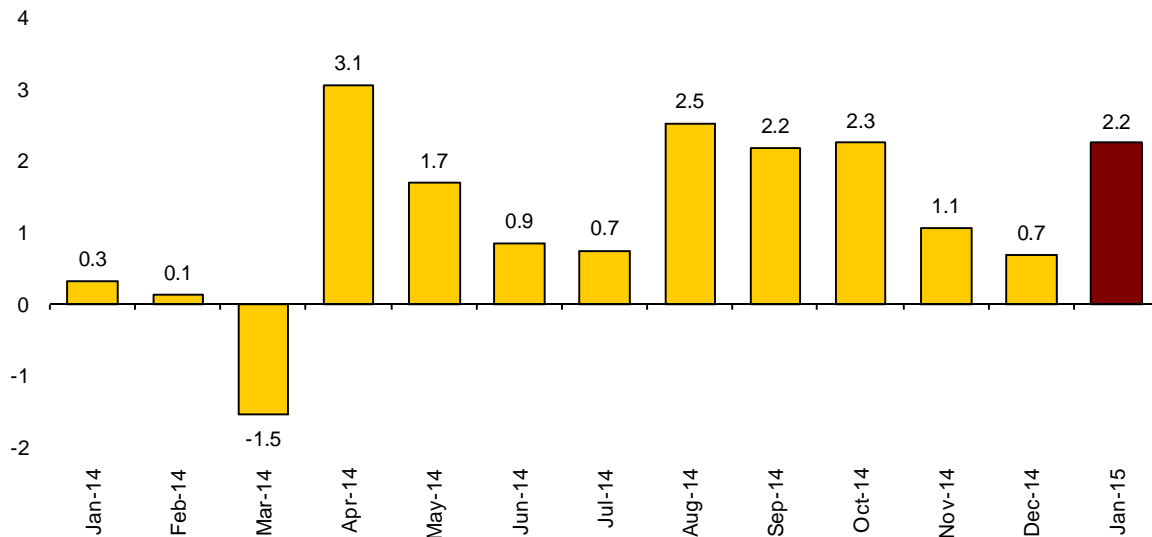
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 2.2% in January, that is, 1.5 points higher than that of the previous month and 1.9 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 December (they represented 81.1% of the total). Hotel prices increased 3.8% in the annual rate in Canarias, 1.3% in Comunidad de Madrid, 0.5% in Cataluña and 0.1% in Andalucía.

By hotel category, the increases in hotel prices were registered in three-golden-star establishments (3.5%), five-golden-star establishments (3.0%), three and two-silver-star establishments (2.3%) and four-golden-star hotels (2.0%).

In turn, the prices registered a decrease in one-golden-star establishments (1.3%), two-golden-star hotels (1.1%) and one-silver-star hotels (0.5%).

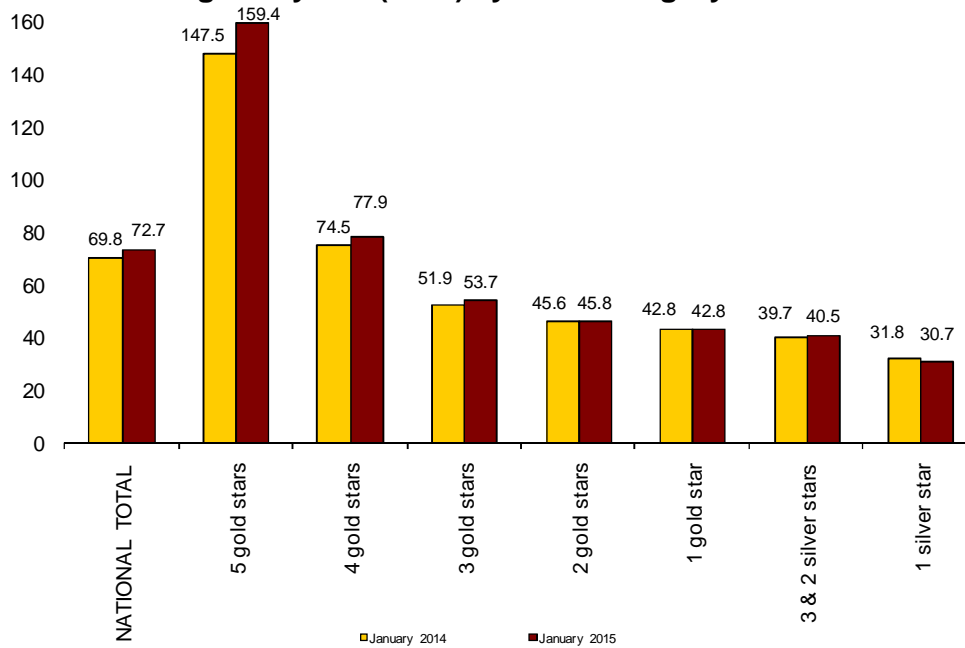
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in January was 72.7 euros, which represented an increase of 4.1% as compared to the same month of 2014.

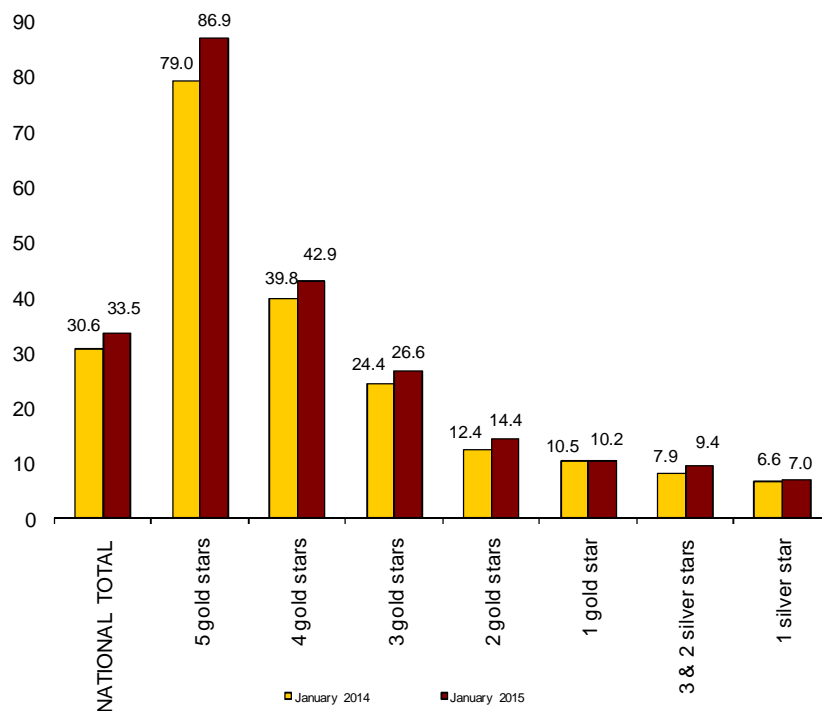
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 33.5 euros, with an increase of 9.5%.

By category, the average invoicing was 159.4 euros for five-star hotels, 77.9 euros for four-star hotels and 53.7 euros for three-star hotels. Income per available room for the same categories was 86.9, 42.9, and 26.6 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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Press Office: Telephone numbers: 91 583 93 63 / 94 08 – Fax: 91 583 90 87 - gprensa@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)

January 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	4,236,617	2,391,563	1,845,053	13,338,952	4,993,350	8,345,601	3.15
HOTELS: Golden stars							
Five	276,367	95,532	180,835	1,038,705	210,783	827,921	3.76
Four	2,085,409	1,097,960	987,449	7,043,282	2,185,647	4,857,635	3.38
Three	1,051,178	630,005	421,174	3,465,527	1,468,400	1,997,127	3.30
Two	311,070	222,479	88,591	676,643	407,877	268,766	2.18
One	126,776	91,105	35,671	248,565	156,293	92,273	1.96
INNS: Silver stars							
Two and three	217,694	155,386	62,308	445,165	299,250	145,915	2.04
One	168,123	99,097	69,026	421,064	265,100	155,964	2.50
Annual rate	7.55	9.30	5.37	4.15	9.83	1.02	-3.16
Cumulative annual rate	7.55	9.30	5.37	4.15	9.83	1.02	-3.16

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	11,977	521,546	1,053,084	40.55	45.50	46.59	134,330
HOTELS: Golden stars							
Five	217	34,445	70,538	47.03	50.50	58.74	20,715
Four	1,671	227,108	471,448	47.79	52.95	55.31	66,697
Three	1,779	119,918	250,049	44.41	49.21	50.42	27,614
Two	1,491	42,459	81,927	26.53	33.92	31.04	6,304
One	920	20,353	38,940	20.44	23.74	23.89	2,882
INNS: Silver stars							
Two and three	2,584	39,351	73,000	19.56	24.84	23.12	5,451
One	3,316	37,912	67,181	20.18	23.33	25.19	4,668
Annual rate	-2.30	-1.53	-1.23	5.52	9.54	6.13	1.15

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-places	Of bed-places at weekend	Of bedrooms		
Tourist area with a greater occupancy rate per month									
Sur de Tenerife	17,332	177,577	103,373	1,539,310	79.19	78.63	88.87	8.43	12,126
Sur de Gran Canaria	11,006	142,924	79,042	1,268,060	78.99	78.81	89.15	8.75	9,986
Isla de Tenerife	40,710	216,692	204,686	1,870,307	77.37	77.42	86.53	8.06	15,249
Isla de Gran Canaria	26,590	164,428	120,419	1,362,985	77.21	77.70	87.56	7.77	11,007
Isla de La Gomera	1,707	6,312	3,104	36,951	73.95	80.18	80.07	5.00	424
Isla de Lanzarote	12,871	80,470	72,052	690,350	71.04	70.59	82.99	8.17	5,556
Isla de Fuerteventura	6,419	94,708	27,519	862,972	64.58	66.39	75.89	8.81	6,964
Isla de La Palma	2,532	6,802	10,138	55,665	52.71	47.34	60.04	7.05	467

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

Barcelona	123,032	290,999	227,251	803,901	42.55	48.96	50.67	2.49	12,851
Costa Blanca	102,531	61,690	417,042	356,943	47.31	52.43	51.14	4.71	6,214
Costa del Sol	82,111	93,694	240,945	434,318	41.63	45.13	51.30	3.84	6,515
Costa Barcelona	62,769	53,633	109,640	120,653	29.67	28.46	36.04	1.98	2,769
Costa Brava	47,123	25,367	110,173	58,579	28.99	34.17	32.98	2.33	1,840
Isla de Mallorca	13,348	23,256	34,785	125,903	36.86	39.00	45.49	4.39	2,149
Palma - Calvià	12,806	19,974	33,623	115,075	37.55	39.19	46.99	4.54	1,834
Pirineo Aragonés	37,203	3,286	105,275	6,992	31.69	49.14	29.41	2.77	1,010

Tourist site with a greater occupancy rate per month

Arona	3,967	55,262	22,648	486,623	83.42	81.04	90.30	8.60	3,021
Mogán	1,306	40,024	5,993	347,891	83.31	82.46	93.13	8.56	1,958
Adeje	6,785	89,679	48,887	818,333	79.88	78.90	89.85	8.99	6,694
Puerto de La Cruz	10,973	25,442	70,898	272,716	79.23	81.54	85.37	9.44	2,282
San Bartolomé de Tirajana	9,610	103,280	72,898	923,598	77.74	77.79	88.18	8.83	8,028
Yaiza	4,584	39,015	35,995	330,573	72.16	72.60	84.67	8.41	2,750
Tías	1,945	22,278	12,433	200,539	71.55	71.50	83.42	8.79	1,532
Teguise	3,721	17,365	16,681	148,311	69.02	68.55	81.04	7.83	1,145
Palmas de Gran Canaria (Las)	13,447	18,768	36,317	85,362	67.03	71.85	80.96	3.78	831
Pájara	1,936	58,244	11,352	546,863	66.61	68.46	76.31	9.28	4,454

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

Madrid	358,732	250,209	658,515	585,206	48.76	57.70	58.65	2.04	10,904
Barcelona	114,107	279,734	208,926	772,338	43.12	50.00	50.86	2.49	12,333
Benidorm	55,364	29,978	304,622	250,646	58.70	64.29	60.85	6.51	3,615
Sevilla	72,263	57,268	124,758	125,397	39.41	50.35	46.15	1.93	3,041
Granada	63,594	44,274	122,451	78,784	47.61	67.79	49.57	1.87	1,467
Torremolinos	15,418	16,788	82,550	116,237	58.21	66.38	65.28	6.17	1,337
Valencia	51,827	40,382	84,598	89,021	33.14	40.12	40.36	1.88	1,784
Oliva (La)	1,268	15,600	4,541	137,428	60.75	60.15	78.16	8.42	1,204
Palma	12,672	17,744	32,071	96,994	38.64	41.17	47.87	4.24	1,624
Málaga	34,285	30,084	58,570	66,830	42.83	49.31	51.78	1.95	1,133

* 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	4,236,617	100.00	13,338,952	100.00
Residents in Spain	2,391,563	56.45	4,993,350	37.43
Residents abroad	1,845,053	43.55	8,345,601	62.57
Total Residents abroad	1,845,053	100.00	8,345,601	100.00
Total Residents in E.U. (without Spain)	1,226,617	66.48	6,641,097	79.58
- Germany	256,981	13.93	1,933,648	23.17
- Austria	15,268	0.83	85,290	1.02
- Belgium	50,786	2.75	295,366	3.54
- Denmark	28,949	1.57	176,977	2.12
- Finland	25,967	1.41	161,294	1.93
- France	171,047	9.27	517,466	6.20
- Greece	3,894	0.21	12,017	0.14
- Ireland	24,022	1.30	119,617	1.43
- Italy	119,207	6.46	424,472	5.09
- Luxembourg	2,772	0.15	22,532	0.27
- Netherlands	59,414	3.22	291,351	3.49
- Poland	24,527	1.33	121,501	1.46
- Portugal	52,508	2.85	117,333	1.41
- United Kingdom	286,956	15.55	1,789,325	21.44
- Czech Republic	7,020	0.38	30,627	0.37
- Sweden	62,168	3.37	433,128	5.19
- Other EU countries*	35,131	1.90	109,151	1.31
Norway	33,732	1.83	225,965	2.71
Russia	41,563	2.25	165,341	1.98
Switzerland	24,581	1.33	112,647	1.35
Rest of Europe	42,386	2.30	136,780	1.64
Japan	41,877	2.27	72,101	0.86
United States of America	71,692	3.89	177,724	2.13
Rest of America	123,738	6.71	307,577	3.69
Africa	41,540	2.25	97,856	1.17
Other countries	197,328	10.69	408,513	4.89

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

Hotel Price Index (HPI). 2008 Base

January 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	91.6	2.2
Andalucía	89.2	0.1
Aragón	77.0	0.0
Asturias, Principado de	76.2	-5.7
Balears, Illes	101.8	5.1
Canarias	105.9	3.8
Cantabria	88.9	-1.2
Castilla y León	87.6	1.5
Castilla - La Mancha	83.8	-1.6
Cataluña	80.0	0.5
Comunitat Valenciana	91.0	4.5
Extremadura	78.8	-2.8
Galicia	88.2	0.9
Madrid, Comunidad de	76.5	1.3
Murcia, Región de	74.6	-0.6
Navarra, Comunidad Foral de	77.3	0.4
País Vasco	85.7	0.9
Rioja, La	84.2	-1.8
Ceuta	106.5	5.4
Melilla	88.1	-1.9

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	91.6	2.2
HOTELS: Gold stars		
Five	91.8	3.0
Fourth	91.0	2.0
Three	92.0	3.5
Two	85.7	-1.1
One	92.7	-1.3
HOSTALS: Silver stars		
Three and two	90.5	2.3
One	92.5	-0.5

Indicators on the Profitability of the Hotel Sector

January 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	72.7	4.1	33.5	9.5
Andalucía	58.8	0.4	21.7	8.4
Aragón	55.0	-1.4	14.8	-0.7
Asturias, Principado de	47.2	-4.7	11.2	2.7
Balears, Illes	66.6	10.0	26.3	16.7
Canarias	86.6	5.3	72.8	3.0
Cantabria	59.0	6.5	13.5	20.5
Castilla y León	50.5	2.0	11.4	13.0
Castilla - La Mancha	49.8	-1.4	11.2	12.1
Cataluña	78.9	4.3	33.0	17.4
Comunitat Valenciana	51.3	5.3	21.1	15.8
Extremadura	49.8	-0.2	9.9	5.7
Galicia	46.2	1.6	9.3	8.4
Madrid, Comunidad de	78.3	8.8	41.6	18.5
Murcia, Región de	52.8	-3.9	19.2	3.4
Navarra, Comunidad Foral de	56.8	0.9	14.5	15.0
País Vasco	62.9	2.4	22.5	5.4
Rioja, La	57.0	1.4	19.5	5.1
Ceuta	70.1	1.4	33.7	9.1
Melilla	62.0	2.3	34.6	6.6

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	72.7	4.1	33.5	9.5
HOTELS: Gold stars				
Five	159.4	8.1	86.9	9.9
Four	77.9	4.5	42.9	7.7
Three	53.7	3.5	26.6	9.0
Two	45.8	0.4	14.4	16.8
One	42.8	0.1	10.2	-2.1
GUESTHOUSES: Silver stars				
Three and two	40.5	1.9	9.4	18.0
One	30.7	-3.5	7.0	6.3

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room