

23 March 2015

Updated at 1:30pm

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

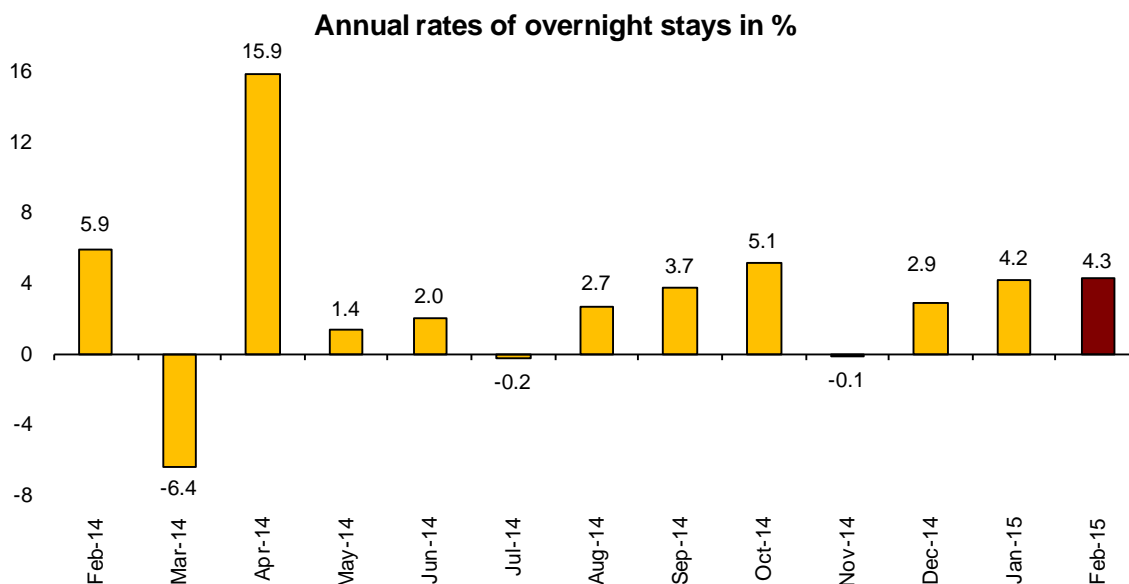
Overnight stays in hotel establishments register an increase of 4.3% in February, as compared to the same month of 2014

Hotels invoice an average of 70.6 euros per available room, which means an annual decrease of 1.9%

In February, a total of 14.4 million overnight stays were registered in hotel establishments, 4.3% more than in the same month of 2014. Overnight stays for residents in Spain increased by 6.7% and those of non-residents did so by 2.7%.

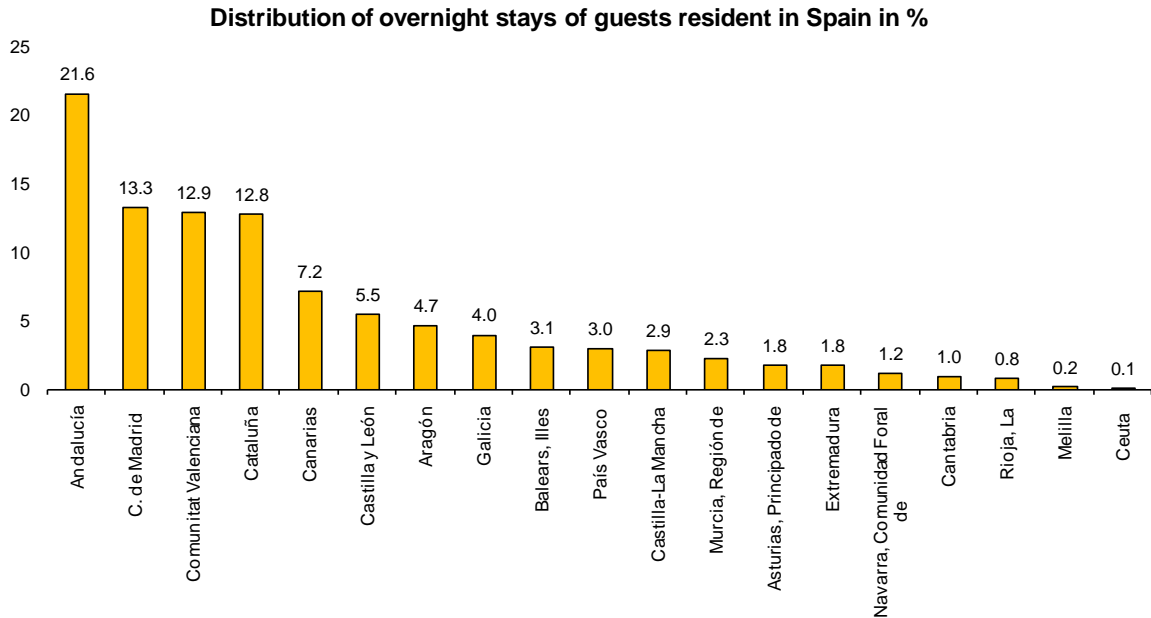
The average stay decreased 1.3%, as compared to February 2014, standing at 2.9 nights per guest.

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

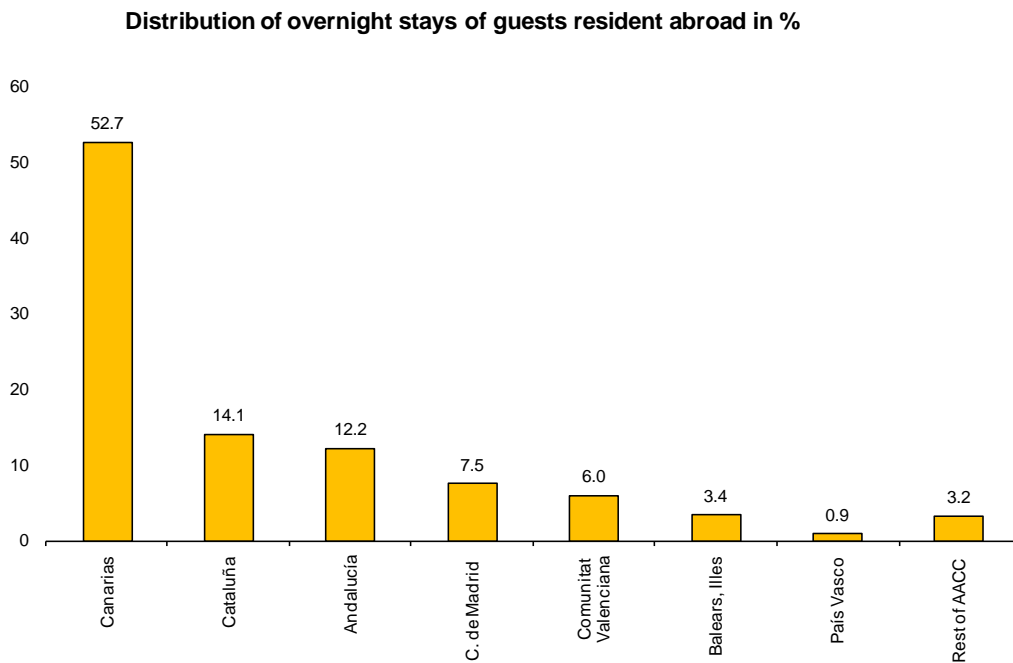


Main destinations

In February, 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 10.3%, 6.2%, 5.5% and 12.2%, respectively.

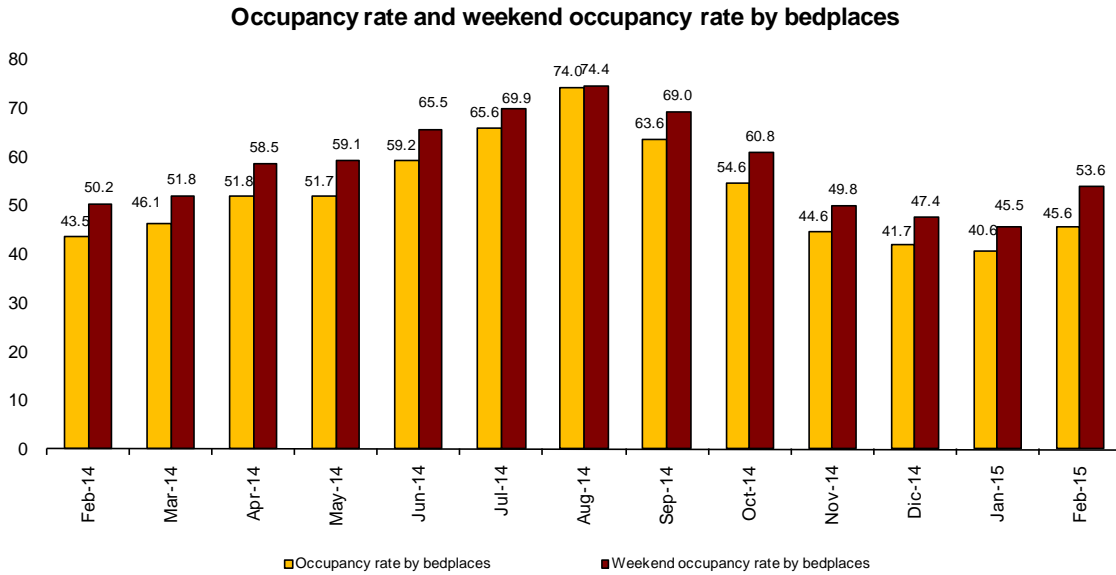


The main destination chosen by non-residents was Canarias, with 52.7% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 0.9% as compared to February 2014. The following destinations of non-residents were Cataluña (14.1% of the total) and Andalucía (12.2%). Overnight stays of non-residents in these communities increased by 5.9% and 10.4%, respectively.



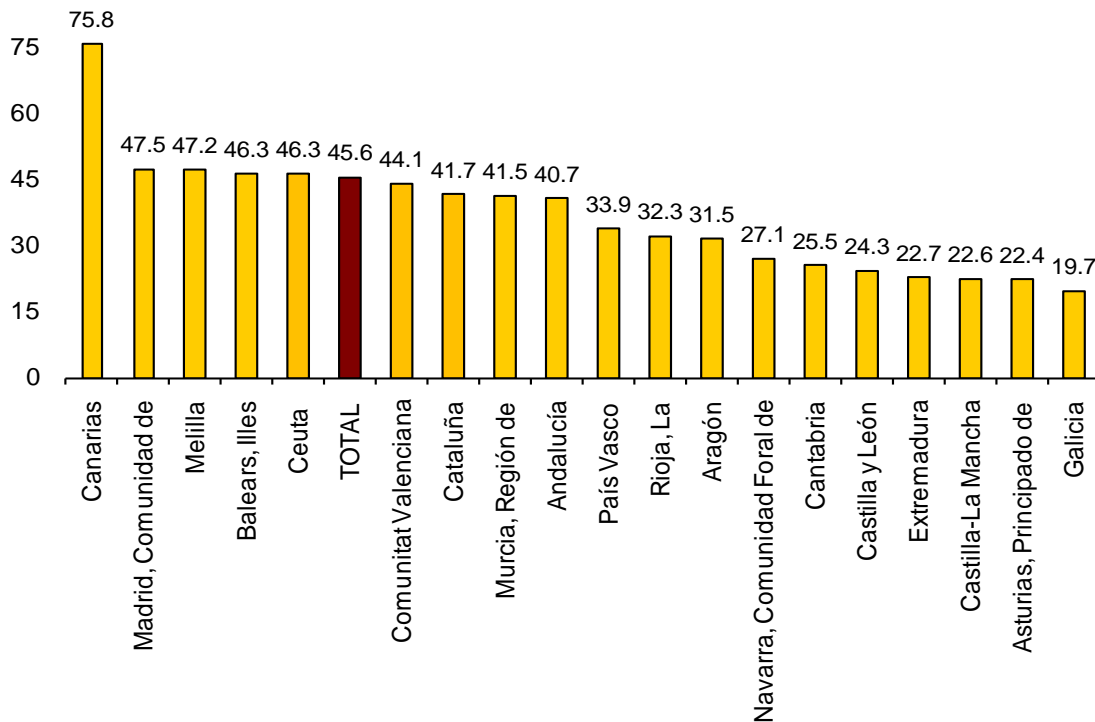
Hotel Occupancy

In February, 45.6% of the available bedplaces were occupied, indicating an annual increase of 4.9%. The weekend occupancy rate by bedplaces increased by 6.8%, standing at 53.6%.



Canarias registered the greatest occupancy rate by bedplaces in February (75.8%), followed by Comunidad de Madrid (47.5%) and Comunitat Valenciana (46.3%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, the South of Tenerife registered both the highest occupancy rate by bedplaces (81.7%), and the highest weekend occupancy rate (81.2%). The island of Tenerife recorded the highest number of overnight stays, with more than 1.9 million.

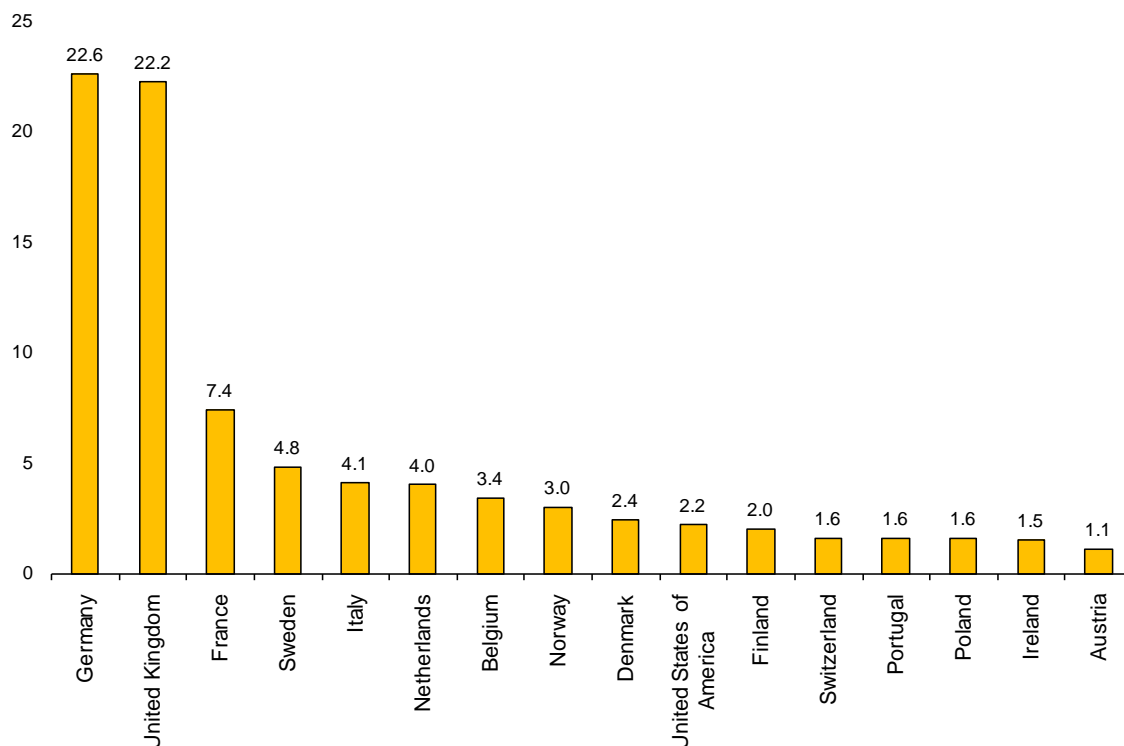
The tourist sites with the highest number of overnight stays were Madrid, San Bartolomé de Tirajana and Barcelona. Mogán reached the highest occupancy rate by bedplaces (86.1%) and the greatest weekend occupancy rate (83.7%).

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom concentrated 22.6% and 22.2%, respectively, of the total of overnight stays in hotel establishments by non-residents in February. The German market decreased by 2.1%, while the British one increased by 2.3%.

Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of 23.9%, -3.3% and 15.6%, respectively.

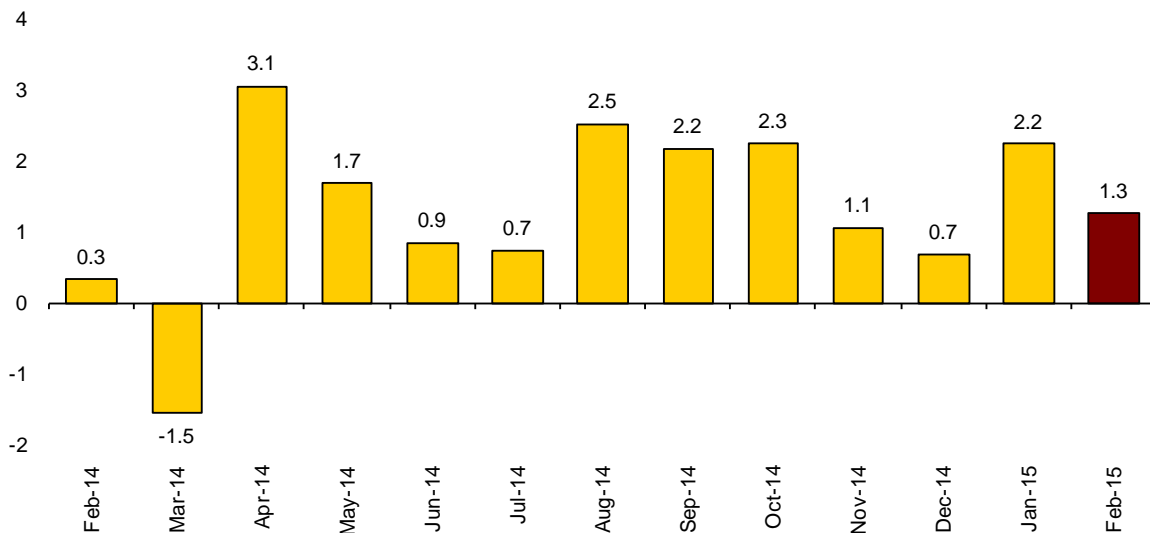
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 1.3% in February, that is, 0.9 points lower than that of the previous month and 1.0 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 February (they represented 78.2% of the total). Hotel prices increased 5.0% in the annual rate in Andalucía, 4.4% in Canarias and 0.9% in Comunidad de Madrid. However, they decreased 0.1% in Cataluña.

By hotel category, the increases in hotel prices were registered in three-golden-star establishments (3.3%), one-silver-star establishments (1.2%), four-golden-star establishments (1.0%) and five-golden-star hotels (0.9%).

In turn, the prices registered a decrease in two-golden-star establishments (1.9%), three and two-golden-star hotels (1.0%).

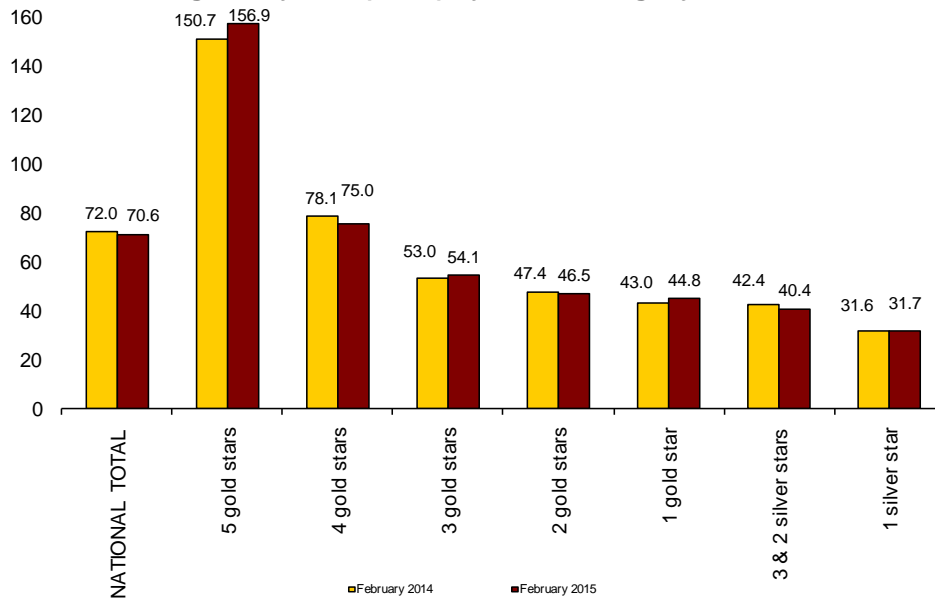
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in February was 70.6 euros, which represented an increase of 1.9% as compared to the same month of 2014.

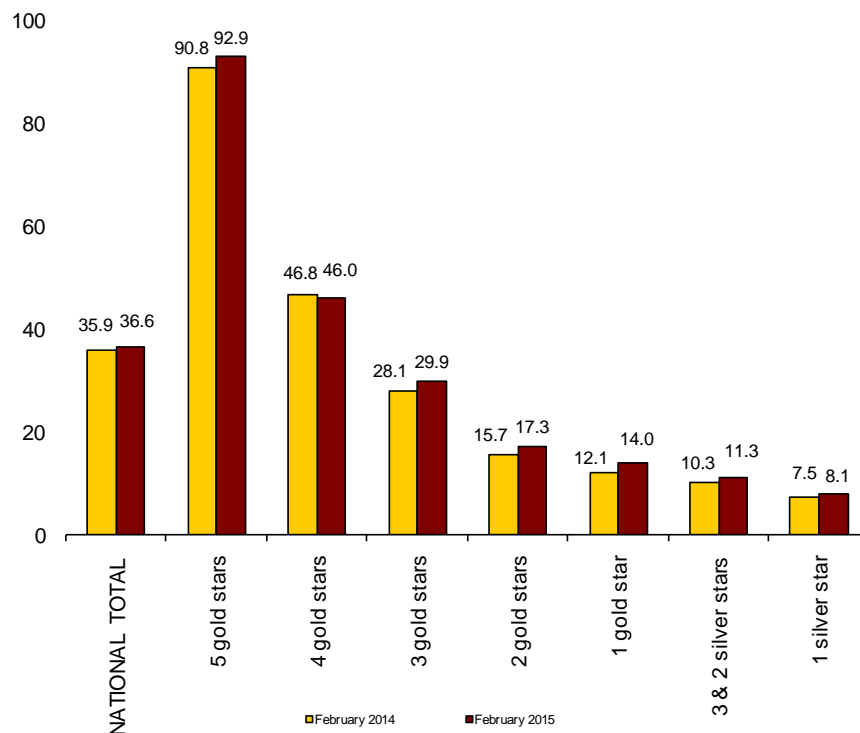
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached **36.7** euros, with an increase of **2.3%**.

By category, the average invoicing was 156.9 euros for five-star hotels, 75.0 euros for four-star hotels and 54.1 euros for three-star hotels. Income per available room for the same categories was 92.9, **46.1**, and 29.9 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/

All press releases at: www.ine.es/en/prensa/prensa_en.htm

Press Office: Telephone numbers: 91 583 93 63 / 94 08 – Fax: 91 583 90 87 - gpresa@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)

February 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 | 4,921,140 | 2,879,648 | 2,041,492 | 14,466,042 | 5,824,955 | 8,641,087 | 2.94 |
| HOTELS: Golden stars | | | | | | | |
| Five | 308,033 | 110,857 | 197,177 | 1,056,824 | 201,419 | 855,405 | 3.43 |
| Four | 2,438,163 | 1,323,959 | 1,114,204 | 7,611,670 | 2,560,850 | 5,050,821 | 3.12 |
| Three | 1,238,074 | 791,787 | 446,287 | 3,814,732 | 1,809,121 | 2,005,611 | 3.08 |
| Two | 351,034 | 253,077 | 97,957 | 759,438 | 469,215 | 290,223 | 2.16 |
| One | 151,804 | 107,778 | 44,026 | 303,231 | 180,232 | 123,000 | 2.00 |
| INNS: Silver stars | | | | | | | |
| Two and three | 260,217 | 189,066 | 71,152 | 490,092 | 333,102 | 156,990 | 1.88 |
| One | 173,814 | 103,125 | 70,689 | 430,054 | 271,017 | 159,037 | 2.47 |
| Annual rate | 5.67 | 5.11 | 6.47 | 4.26 | 6.74 | 2.65 | -1.33 |
| Cumulative annual rate | 6.53 | 6.97 | 5.94 | 4.21 | 8.15 | 1.84 | -2.18 |

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 | 12,482 | 553,818 | 1,121,328 | 45.62 | 53.64 | 52.34 | 141,393 |
| HOTELS: Golden stars | | | | | | | |
| Five | 228 | 35,369 | 72,227 | 51.37 | 58.44 | 60.08 | 21,179 |
| Four | 1,765 | 242,875 | 506,784 | 53.07 | 61.21 | 62.08 | 70,891 |
| Three | 1,933 | 130,740 | 271,626 | 49.71 | 57.60 | 56.06 | 29,700 |
| Two | 1,573 | 44,782 | 86,316 | 31.23 | 41.17 | 36.57 | 6,617 |
| One | 975 | 21,107 | 40,359 | 26.68 | 34.82 | 30.91 | 3,041 |
| INNS: Silver stars | | | | | | | |
| Two and three | 2,675 | 40,533 | 75,558 | 23.06 | 31.63 | 27.64 | 5,503 |
| One | 3,331 | 38,411 | 68,458 | 22.37 | 27.88 | 27.13 | 4,462 |
| Annual rate | -2.33 | -1.28 | -0.83 | 4.90 | 6.79 | 4.95 | 1.84 |

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 | 17,244 | 179,092 | 96,286 | 1,449,297 | 81.66 | 81.24 | 90.54 | 7.87 | 12,365 |
| Sur de Gran Canaria | 12,154 | 137,164 | 66,553 | 1,184,057 | 81.04 | 79.59 | 89.62 | 8.38 | 9,966 |
| Isla de Tenerife | 43,383 | 215,481 | 204,045 | 1,751,688 | 80.10 | 79.76 | 88.86 | 7.56 | 15,508 |
| Isla de Gran Canaria | 31,412 | 154,310 | 120,252 | 1,259,268 | 79.41 | 78.48 | 88.77 | 7.43 | 10,964 |
| Isla de La Gomera | 1,191 | 6,566 | 2,263 | 35,367 | 76.95 | 73.34 | 83.00 | 4.85 | 412 |
| Isla de Lanzarote | 11,577 | 82,087 | 49,844 | 661,383 | 73.22 | 73.64 | 84.10 | 7.59 | 5,556 |
| Isla de Fuerteventura | 6,295 | 96,547 | 34,268 | 797,560 | 66.91 | 65.74 | 75.63 | 8.09 | 6,741 |
| Val d'Aran | 22,365 | 10,014 | 71,849 | 37,564 | 58.46 | 68.92 | 60.32 | 3.38 | 922 |

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

| | | | | | | | | | |
|--------------------------|---------|---------|---------|---------|-------|-------|-------|------|--------|
| Barcelona | 121,519 | 336,511 | 222,255 | 882,646 | 50.66 | 58.47 | 60.05 | 2.41 | 12,466 |
| Costa del Sol | 112,976 | 114,485 | 302,020 | 508,598 | 49.21 | 56.44 | 57.67 | 3.56 | 7,085 |
| Costa Blanca | 136,579 | 63,494 | 447,320 | 356,897 | 52.04 | 64.65 | 56.03 | 4.02 | 6,402 |
| Isla de Mallorca | 32,821 | 50,365 | 125,521 | 288,274 | 47.03 | 50.47 | 54.21 | 4.97 | 4,035 |
| Palma - Calvià | 22,303 | 36,409 | 75,842 | 217,555 | 46.40 | 49.14 | 55.22 | 5.00 | 2,887 |
| Costa Barcelona | 77,993 | 62,898 | 129,473 | 144,356 | 38.41 | 40.84 | 49.22 | 1.94 | 2,849 |
| Costa Brava | 63,680 | 34,401 | 129,246 | 91,132 | 34.62 | 50.14 | 38.49 | 2.25 | 2,273 |
| Costa de la Luz de Cádiz | 57,824 | 18,482 | 119,382 | 63,999 | 36.11 | 50.33 | 43.59 | 2.40 | 1,922 |

Tourist site with a greater occupancy rate per month

| | | | | | | | | | |
|------------------------------|--------|---------|--------|---------|-------|-------|-------|------|-------|
| Mogán | 1,818 | 35,215 | 6,539 | 323,879 | 86.12 | 83.70 | 93.05 | 8.92 | 1,992 |
| Arona | 3,445 | 54,099 | 23,842 | 444,550 | 84.85 | 81.95 | 92.37 | 8.14 | 2,929 |
| Adeje | 6,097 | 92,981 | 40,466 | 767,702 | 81.66 | 82.54 | 90.45 | 8.16 | 6,940 |
| Puerto de La Cruz | 11,537 | 22,443 | 73,022 | 246,089 | 81.47 | 81.21 | 87.76 | 9.39 | 2,279 |
| San Bartolomé de Tirajana | 10,650 | 101,543 | 62,110 | 857,269 | 79.27 | 78.08 | 88.41 | 8.19 | 7,989 |
| Yaiza | 4,378 | 39,500 | 22,515 | 320,436 | 74.39 | 76.42 | 86.41 | 7.82 | 2,793 |
| Tías | 1,896 | 22,327 | 9,656 | 186,631 | 73.16 | 72.77 | 83.00 | 8.10 | 1,496 |
| Teguise | 2,387 | 18,731 | 11,500 | 144,505 | 72.12 | 70.27 | 83.03 | 7.39 | 1,159 |
| Monachil | 18,686 | 8,643 | 41,579 | 24,923 | 68.96 | 74.62 | 72.92 | 2.43 | 454 |
| Palmas de Gran Canaria (Las) | 16,448 | 14,893 | 46,285 | 65,301 | 68.55 | 71.90 | 85.08 | 3.56 | 819 |

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

| | | | | | | | | | |
|--------------|---------|---------|---------|---------|-------|-------|-------|------|--------|
| Madrid | 355,642 | 267,626 | 598,852 | 584,380 | 51.53 | 64.62 | 63.77 | 1.90 | 11,005 |
| Barcelona | 114,195 | 324,274 | 205,344 | 849,090 | 51.38 | 59.93 | 60.55 | 2.40 | 11,829 |
| Benidorm | 71,169 | 33,178 | 311,583 | 245,058 | 60.89 | 74.93 | 63.06 | 5.33 | 3,802 |
| Pájara | 2,910 | 55,418 | 22,340 | 485,662 | 67.92 | 68.69 | 74.65 | 8.71 | 4,227 |
| Sevilla | 86,074 | 66,418 | 139,255 | 143,452 | 48.74 | 70.18 | 56.85 | 1.85 | 3,132 |
| Torremolinos | 20,851 | 22,991 | 107,831 | 140,031 | 66.00 | 69.33 | 67.43 | 5.65 | 1,461 |
| Granada | 70,707 | 46,595 | 134,052 | 101,279 | 60.18 | 82.25 | 65.64 | 2.01 | 1,544 |
| Valencia | 69,226 | 47,273 | 108,699 | 104,843 | 44.54 | 50.23 | 55.75 | 1.83 | 1,759 |
| Palma | 17,784 | 28,786 | 47,103 | 160,772 | 48.57 | 50.62 | 57.20 | 4.46 | 2,154 |
| Málaga | 38,461 | 32,621 | 60,444 | 72,154 | 49.73 | 59.45 | 62.21 | 1.87 | 1,122 |

* 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 | 4,921,140 | 100.00 | 14,466,042 | 100.00 |
| Residents in Spain | 2,879,648 | 58.52 | 5,824,955 | 40.27 |
| Residents abroad | 2,041,492 | 41.48 | 8,641,087 | 59.73 |
| Total Residents abroad | 2,041,492 | 100.00 | 8,641,087 | 100.00 |
| Total Residents in E.U. (without Spain) | 1,424,731 | 69.79 | 6,979,715 | 80.77 |
| - Germany | 284,216 | 13.92 | 1,952,565 | 22.60 |
| - Austria | 18,574 | 0.91 | 94,838 | 1.10 |
| - Belgium | 53,510 | 2.62 | 296,372 | 3.43 |
| - Denmark | 35,784 | 1.75 | 207,071 | 2.40 |
| - Finland | 29,779 | 1.46 | 171,258 | 1.98 |
| - France | 218,917 | 10.72 | 636,444 | 7.37 |
| - Greece | 5,023 | 0.25 | 14,038 | 0.16 |
| - Ireland | 28,507 | 1.40 | 127,394 | 1.47 |
| - Italy | 114,036 | 5.59 | 357,435 | 4.14 |
| - Luxembourg | 4,005 | 0.20 | 23,369 | 0.27 |
| - Netherlands | 74,966 | 3.67 | 348,237 | 4.03 |
| - Poland | 28,519 | 1.40 | 135,146 | 1.56 |
| - Portugal | 66,761 | 3.27 | 137,968 | 1.60 |
| - United Kingdom | 354,155 | 17.35 | 1,914,295 | 22.15 |
| - Czech Republic | 7,488 | 0.37 | 34,014 | 0.39 |
| - Sweden | 64,118 | 3.14 | 414,369 | 4.80 |
| - Other EU countries* | 36,373 | 1.78 | 114,901 | 1.33 |
| Norway | 36,627 | 1.79 | 260,705 | 3.02 |
| Russia | 19,185 | 0.94 | 61,607 | 0.71 |
| Switzerland | 35,107 | 1.72 | 141,355 | 1.64 |
| Rest of Europe | 45,312 | 2.22 | 142,853 | 1.65 |
| Japan | 44,289 | 2.17 | 82,265 | 0.95 |
| United States of America | 76,247 | 3.73 | 186,681 | 2.16 |
| Rest of America | 108,586 | 5.32 | 277,626 | 3.21 |
| Africa | 35,204 | 1.72 | 79,873 | 0.92 |
| Other countries | 216,203 | 10.59 | 428,406 | 4.96 |

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

Hotel Price Index (HPI). 2008 Base

February 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

| | Index | Annual growth rate |
|-----------------------------|-------------|--------------------|
| TOTAL | 88.7 | 1.3 |
| Andalucía | 92.5 | 5.0 |
| Aragón | 77.6 | 2.4 |
| Asturias, Principado de | 75.8 | -3.1 |
| Balears, Illes | 90.7 | 2.5 |
| Canarias | 106.2 | 4.4 |
| Cantabria | 86.2 | 0.5 |
| Castilla y León | 87.2 | 1.1 |
| Castilla - La Mancha | 86.0 | -0.3 |
| Cataluña | 73.9 | -8.1 |
| Comunitat Valenciana | 86.6 | 3.0 |
| Extremadura | 81.1 | -0.7 |
| Galicia | 87.1 | 0.4 |
| Madrid, Comunidad de | 72.9 | 0.9 |
| Murcia, Región de | 77.2 | 0.8 |
| Navarra, Comunidad Foral de | 76.4 | -2.6 |
| País Vasco | 84.1 | 1.4 |
| Rioja, La | 86.3 | 3.0 |
| Ceuta | 99.1 | 2.2 |
| Melilla | 93.2 | 1.0 |

National General Index and breakdown by categories

| | Index | Annual growth rate |
|------------------------------|-------------|--------------------|
| TOTAL | 88.7 | 1.3 |
| HOTELS: Gold stars | | |
| Five | 84.0 | 0.9 |
| Fourth | 88.4 | 1.0 |
| Three | 90.0 | 3.3 |
| Two | 85.3 | -1.9 |
| One | 97.8 | 1.1 |
| HOSTALS: Silver stars | | |
| Three and two | 87.5 | -1.0 |
| One | 94.3 | 1.2 |

Indicators on the Profitability of the Hotel Sector

February 2015

Provisional data

National ADR and RevPAR^(*) and

| | ADR (in euros) | Annual growth rate | RevPar (in euros) | Annual growth rate |
|-----------------------------|-------------------|-----------------------|----------------------|-----------------------|
| TOTAL | 70.6 | -1.9 | 36.7 | 2.3 |
| Andalucía | 60.9 | 5.0 | 28.8 | 18.2 |
| Aragón | 59.2 | 4.1 | 20.8 | 6.5 |
| Asturias, Principado de | 46.8 | -1.4 | 12.2 | 6.7 |
| Balears, Illes | 54.7 | -2.6 | 27.8 | 6.4 |
| Canarias | 87.5 | 4.9 | 74.5 | 3.4 |
| Cantabria | 55.1 | 3.6 | 15.7 | 22.6 |
| Castilla y León | 50.3 | 0.1 | 14.7 | 14.9 |
| Castilla - La Mancha | 52.6 | 1.6 | 14.4 | 13.0 |
| Cataluña | 78.9 | -20.7 | 38.8 | -19.5 |
| Comunitat Valenciana | 50.9 | 2.7 | 25.0 | 5.3 |
| Extremadura | 50.5 | 1.3 | 13.1 | 14.0 |
| Galicia | 47.0 | 0.2 | 11.7 | 5.3 |
| Madrid, Comunidad de | 72.9 | 1.6 | 43.6 | 7.5 |
| Murcia, Región de | 48.5 | -4.2 | 22.7 | 2.6 |
| Navarra, Comunidad Foral de | 54.2 | -2.3 | 17.8 | 9.9 |
| País Vasco | 63.3 | 2.1 | 26.6 | 8.9 |
| Rioja, La | 58.4 | 3.1 | 23.7 | 1.8 |
| Ceuta | 71.4 | 4.8 | 35.2 | 14.0 |
| Melilla | 63.4 | 4.5 | 38.3 | 6.7 |

National ADR and RevPar^(*) and

| | ADR (in euros) | Annual growth rate | RevPar (in euros) | Annual growth rate |
|----------------------------------|-------------------|-----------------------|----------------------|-----------------------|
| TOTAL | 70.6 | -1.9 | 36.7 | 2.3 |
| HOTELS: Gold stars | | | | |
| Five | 156.9 | 4.1 | 92.9 | 2.3 |
| Four | 75.0 | -4.0 | 46.1 | -1.4 |
| Three | 54.1 | 2.0 | 29.9 | 6.4 |
| Two | 46.5 | -1.9 | 17.3 | 9.8 |
| One | 44.8 | 4.1 | 14.0 | 15.4 |
| GUESTHOUSES: Silver stars | | | | |
| Three and two | 40.4 | -4.6 | 11.3 | 9.7 |
| One | 31.7 | 0.0 | 8.1 | 7.0 |

(*) ADR: Average Daily Rate
RevPAR: Revenue per Available Room