

24 April 2015

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

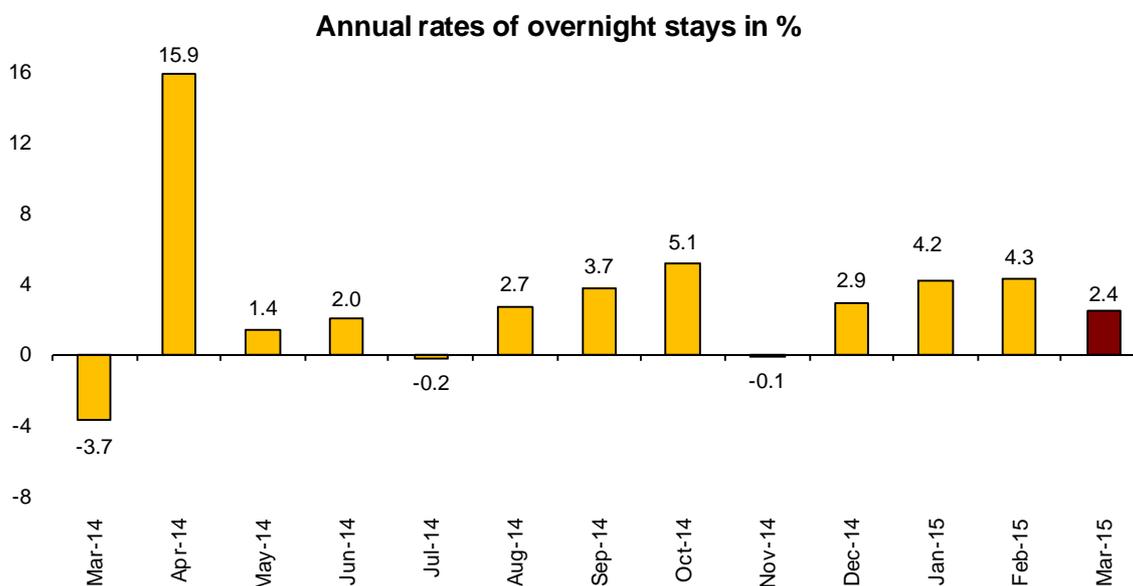
Overnight stays in hotel establishments¹ register an increase of 2.4% in March, as compared to the same month of 2014

Hotels invoice an average of 73.9 euros per occupied room, which means an annual decrease of 8.2%

In March, a total of 18.5 million overnight stays were registered in hotel establishments, 2.4% more than in the same month of 2014. Overnight stays for residents in Spain increased by 9.5% and those of non-residents did so by 2.1%.

The average stay decreased 3.7%, as compared to March 2014, standing at 3.0 nights per guest.

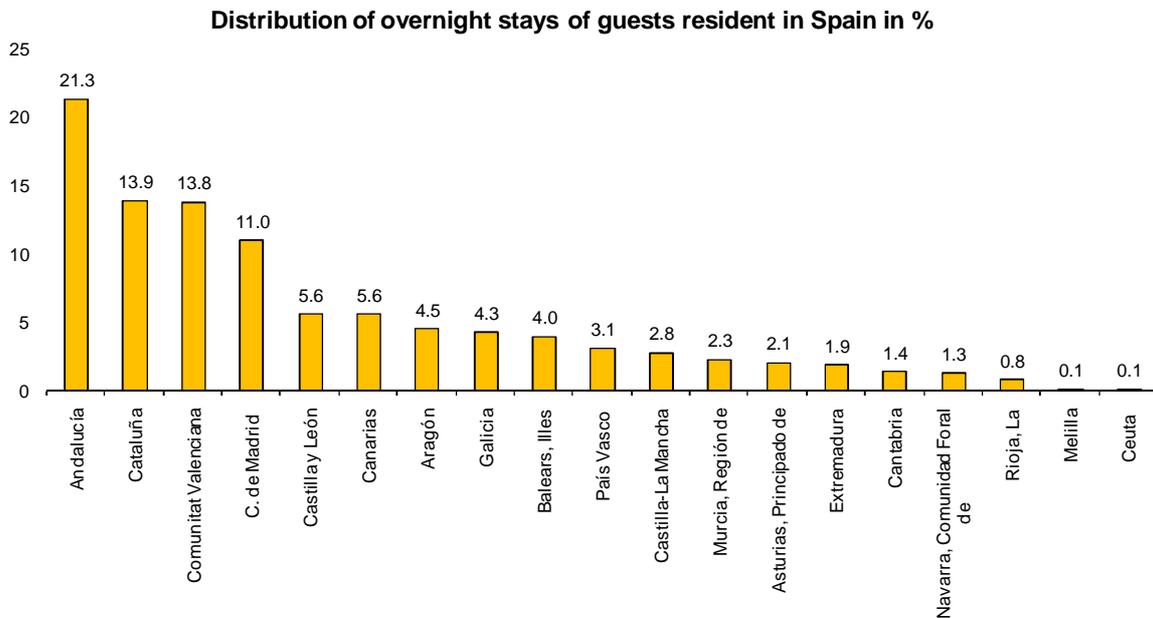
During the first quarter in 2015, overnight stays increased 3.5%, as compared to the same period of the previous year.



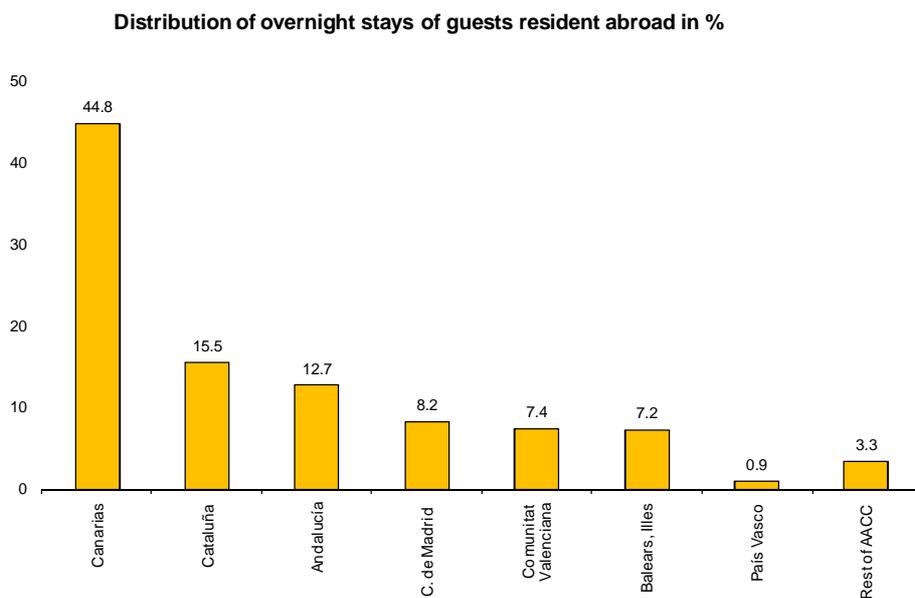
¹ Since Easter Week is celebrated during March and April in 2015, and in 2014 it was celebrated in April, it is necessary to wait for the results of these surveys from the following month in order to analyse the two months combined.

Main destinations

In March, 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 16.5%, 9.7%, 6.9% and 1.9%, respectively.

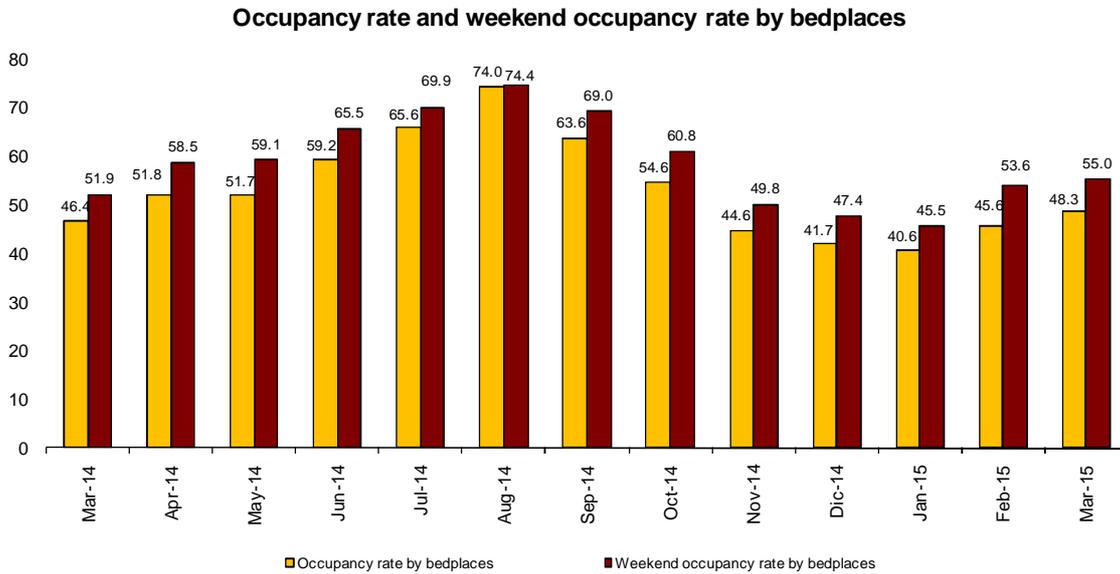


The main destination chosen by non-residents was Canarias, with 44.8% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 10.0% as compared to March 2014. The following destinations of non-residents were Cataluña (15.5% of the total) and Andalucía (12.7%). Overnight stays of non-residents in these communities increased by 3.8% and 2.9%, respectively.



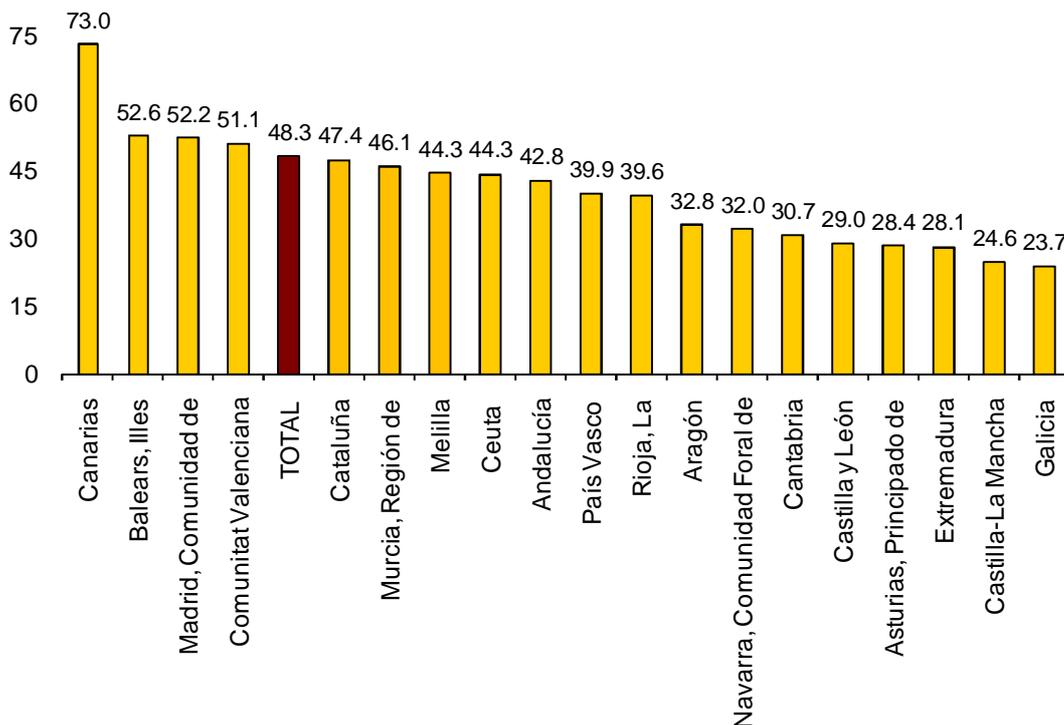
Hotel Occupancy

In March, 48.3% of the available bedplaces were occupied, indicating an annual increase of 4.2%. The weekend occupancy rate by bedplaces increased by 6.0%, standing at 55.0%.



Canarias registered the greatest occupancy rate by bedplaces in March (73.0%), followed by Illes Balears (52.6%) and Comunidad de Madrid (52.2%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the South of Tenerife registered the highest occupancy rate by bedplaces (76.6%), while La Gomera registered the highest weekend occupancy rate (78.2%). The island of Tenerife recorded the highest number of overnight stays, with more than 1.9 million.

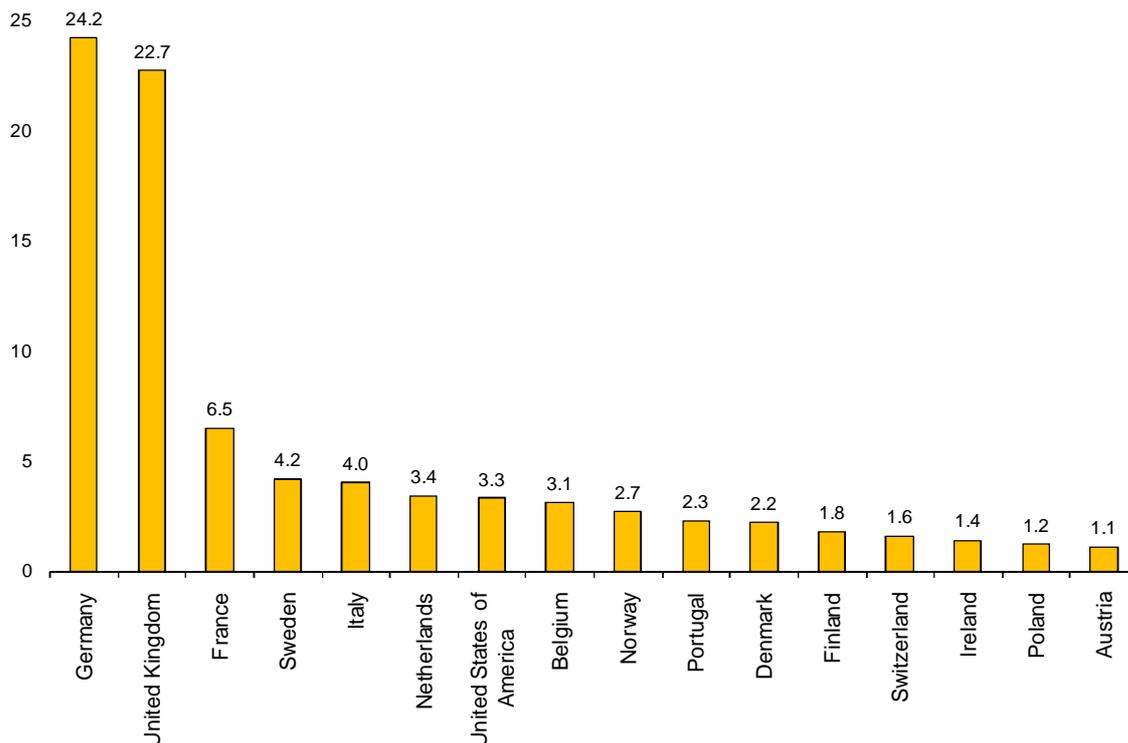
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Arona reached the highest occupancy rate by bedplaces (80.5%) and the greatest weekend occupancy rate (80.2%).

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom concentrated 24.2% and 22.7%, respectively, of the total of overnight stays in hotel establishments by non-residents in March. The German market decreased by 15.2%, while the British one increased by 6.1%.

Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of -0.2%, -5.4% and 2.4%, respectively.

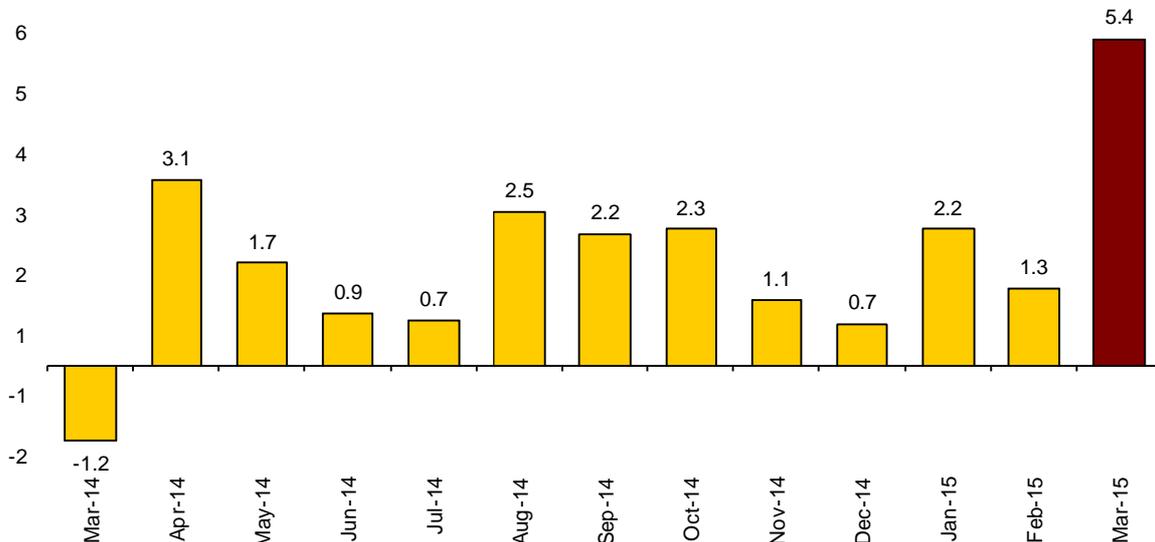
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 5.4% in March, that is, 4.1 points higher than that of the previous month and 6.6 points over that registered in the previous year.

Hotel Prices Index. Annual variation rate



Canarias, Cataluña, Andalucía and Comunidad de Madrid were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of March (they represented 74.8% of the total). Hotel prices increased 12.0% in the annual rate in Cataluña, 5.2% in Andalucía, 4.8% in Canarias and 2.4% in Comunidad de Madrid.

By hotel category, the increase in hotel prices were registered in all the categories: one-golden-star establishments (7.3%), three-golden-star establishments (6.3%), one-silver-star establishments (6.0%), four-golden-star establishments (5.7%), three and two-silver-star establishments (4.7%), five-golden-star hotels (3.8%) and two-golden-star establishments (1.8%).

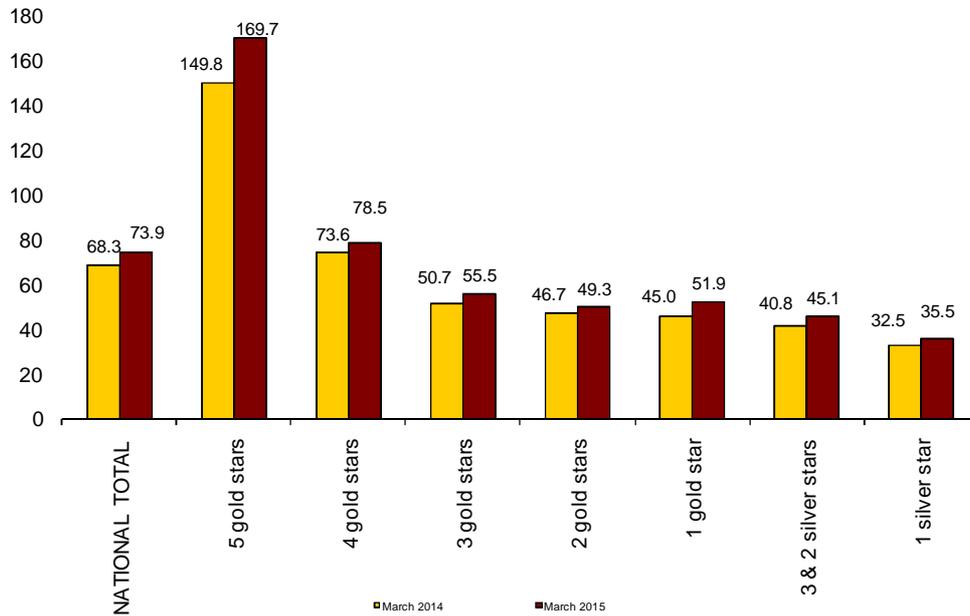
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in March was 73.9 euros, which represented an increase of 8.2% as compared to the same month of 2014.

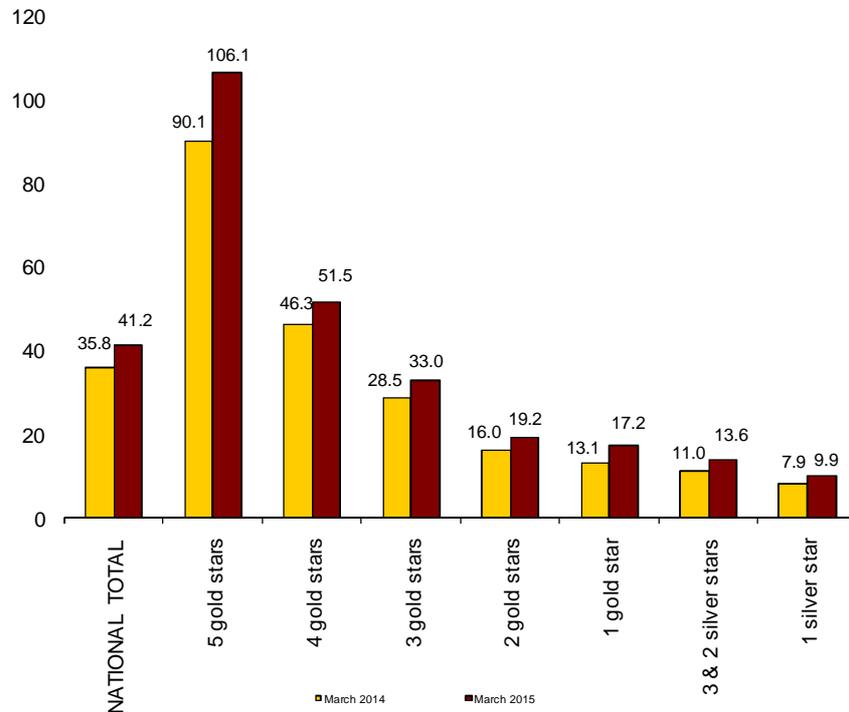
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 41.2 euros, with an increase of 15.0%.

By category, the average invoicing was 169.7 euros for five-star hotels, 78.5 euros for four-star hotels and 55.5 euros for three-star hotels. Income per available room for the same categories was 106.1, 51.5, and 33.0 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)

March 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	6,136,261	3,484,593	2,651,668	18,568,074	7,705,480	10,862,594	3.03
HOTELS: Golden stars							
Five	365,218	121,340	243,878	1,257,238	235,679	1,021,560	3.44
Four	3,003,278	1,561,495	1,441,783	9,696,294	3,372,628	6,323,666	3.23
Three	1,576,660	980,781	595,878	5,075,274	2,497,168	2,578,106	3.22
Two	442,513	315,967	126,546	967,231	617,055	350,177	2.19
One	182,078	127,493	54,585	381,027	229,097	151,930	2.09
INNS: Silver stars							
Two and three	330,018	236,878	93,140	650,797	430,245	220,552	1.97
One	236,497	140,639	95,858	540,213	323,609	216,604	2.28
Annual rate	6.33	10.22	1.62	2.42	9.49	-2.06	-3.68
Cumulative annual rate	6.45	8.24	4.15	3.48	8.70	0.28	-2.79

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	13,349	603,851	1,228,355	48.32	55.02	55.54	155,588
HOTELS: Golden stars							
Five	246	36,833	75,128	53.75	58.52	63.14	22,744
Four	1,925	265,264	556,647	55.62	62.35	65.43	77,698
Three	2,151	148,779	309,757	52.35	58.81	59.17	33,900
Two	1,692	48,176	92,644	33.42	42.15	38.50	7,355
One	1,050	22,113	42,462	28.81	36.59	33.73	3,416
INNS: Silver stars							
Two and three	2,808	42,663	79,530	26.23	34.38	30.10	5,684
One	3,477	40,023	72,187	24.05	28.65	29.13	4,792
Annual rate	-1.92	-0.59	-0.07	4.24	5.96	5.85	2.00

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		

Tourist area with a greater occupancy rate per month

Sur de Tenerife	24,645	187,264	98,772	1,482,220	76.57	77.29	85.00	7.46	12,275
Sur de Gran Canaria	14,360	140,408	60,445	1,236,216	75.92	75.17	85.74	8.38	9,752
Isla de Lanzarote	16,457	96,661	66,589	760,727	75.58	74.22	88.34	7.31	5,839
Isla de Tenerife	52,991	226,861	213,701	1,780,372	74.77	75.37	82.63	7.13	15,438
Isla de Gran Canaria	34,538	160,110	106,546	1,319,085	74.18	73.88	84.53	7.32	10,747
Isla de La Gomera	1,490	5,689	2,580	35,377	70.10	78.24	77.31	5.29	418
Isla de Fuerteventura	7,721	109,209	29,883	917,195	68.70	70.76	79.80	8.10	6,684
Islas de Ibiza-Formentera	14,183	2,854	68,612	7,342	66.84	55.62	69.50	4.46	422

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

Barcelona	131,209	438,184	253,620	1,228,081	60.39	64.48	74.40	2.60	12,651
Costa Blanca	156,518	100,278	581,291	555,827	58.68	64.03	61.75	4.43	7,115
Costa del Sol	125,392	152,248	406,796	663,861	50.85	54.29	60.51	3.86	8,161
Isla de Mallorca	43,976	131,253	212,519	772,847	52.22	53.44	59.49	5.62	8,221
Palma - Calvià	33,919	82,567	171,073	469,270	53.19	54.83	60.41	5.50	5,145
Costa Barcelona	104,993	82,983	219,127	211,090	48.09	51.47	57.50	2.29	3,226
Costa Brava	82,657	54,912	217,820	157,106	38.74	47.00	42.59	2.73	3,134
Costa de Almería	54,269	10,369	216,480	53,150	38.05	40.96	53.65	4.17	1,774

Tourist site with a greater occupancy rate per month

Arona	6,508	56,863	29,667	461,636	80.52	80.23	86.46	7.75	3,103
Mogán	2,938	37,840	8,353	335,969	80.49	78.30	90.45	8.44	1,928
Yaiza	5,596	45,624	27,793	363,112	77.72	77.12	91.10	7.63	2,936
Tías	3,226	28,681	14,558	230,560	76.32	74.13	87.21	7.68	1,573
Adeje	9,484	97,280	38,794	782,107	76.21	77.10	85.11	7.69	6,805
Puerto de La Cruz	13,887	25,809	80,661	242,320	75.10	75.55	78.56	8.14	2,306
San Bartolomé de Tirajana	11,452	102,461	52,146	899,539	74.37	74.09	84.18	8.35	7,826
Antigua	1,723	23,253	7,242	176,345	72.87	71.97	86.45	7.35	1,084
Teguise	4,169	21,216	16,207	159,748	72.77	69.70	87.51	6.93	1,215
Pájara	3,170	67,818	13,095	576,633	70.94	73.87	79.66	8.31	4,277

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

Madrid	365,883	352,284	628,293	803,242	56.15	65.08	69.06	1.99	10,926
Barcelona	120,383	422,213	230,947	1,186,062	61.32	65.53	75.21	2.61	11,992
Benidorm	79,210	57,722	399,311	386,781	67.31	71.84	69.00	5.74	4,296
Sevilla	101,359	81,398	180,474	179,562	55.57	70.52	63.75	1.97	3,292
Palma	23,162	49,027	100,342	257,618	53.70	57.61	61.38	4.96	3,023
Torremolinos	21,886	31,525	130,235	173,619	63.96	64.35	67.52	5.69	1,699
Valencia	91,736	58,183	154,796	131,098	52.86	61.16	60.84	1.91	1,831
Granada	78,356	57,316	146,839	106,373	57.60	75.78	61.72	1.87	1,565
Calvià	7,187	30,424	47,207	200,833	50.34	49.42	57.40	6.59	1,857
Lloret de Mar	39,621	20,026	147,593	79,916	55.25	63.69	58.71	3.81	901

* 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	6,136,261	100.00	18,568,074	100.00
Residents in Spain	3,484,593	56.79	7,705,480	41.50
Residents abroad	2,651,668	43.21	10,862,594	58.50
Total Residents abroad	2,651,668	100.00	10,862,594	100.00
Total Residents in E.U. (without Spain)	1,868,067	70.45	8,710,995	80.19
- Germany	435,636	16.43	2,627,809	24.19
- Austria	30,105	1.14	115,826	1.07
- Belgium	67,298	2.54	335,631	3.09
- Denmark	47,028	1.77	240,575	2.21
- Finland	34,957	1.32	199,424	1.84
- France	239,020	9.01	703,720	6.48
- Greece	6,519	0.25	20,525	0.19
- Ireland	35,480	1.34	153,432	1.41
- Italy	146,164	5.51	436,431	4.02
- Luxembourg	3,465	0.13	18,133	0.17
- Netherlands	87,859	3.31	366,081	3.37
- Poland	32,337	1.22	126,359	1.16
- Portugal	88,414	3.33	248,495	2.29
- United Kingdom	474,846	17.91	2,461,161	22.66
- Czech Republic	8,742	0.33	33,359	0.31
- Sweden	77,342	2.92	458,611	4.22
- Other EU countries*	52,855	1.99	165,423	1.52
Norway	44,371	1.67	292,621	2.69
Russia	31,479	1.19	103,316	0.95
Switzerland	46,026	1.74	176,778	1.63
Rest of Europe	54,907	2.07	175,139	1.61
Japan	51,200	1.93	89,259	0.82
United States of America	146,348	5.52	360,471	3.32
Rest of America	148,880	5.61	363,100	3.34
Africa	41,007	1.55	99,212	0.91
Other countries	219,382	8.27	491,703	4.53

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

Hotel Price Index (HPI). 2008 Base

March 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	91.5	5.4
Andalucía	86.5	5.2
Aragón	75.1	2.9
Asturias, Principado de	75.1	-4.0
Balears, Illes	99.9	6.7
Canarias	107.9	4.8
Cantabria	85.0	2.7
Castilla y León	83.4	0.7
Castilla - La Mancha	83.8	1.1
Cataluña	91.5	12.0
Comunitat Valenciana	86.1	3.5
Extremadura	83.6	4.8
Galicia	85.9	-0.8
Madrid, Comunidad de	76.4	2.4
Murcia, Región de	75.5	3.2
Navarra, Comunidad Foral de	78.7	-2.9
País Vasco	81.6	1.7
Rioja, La	80.6	1.2
Ceuta	94.8	0.4
Melilla	95.7	0.8

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	91.5	5.4
HOTELS: Gold stars		
Five	86.9	3.8
Fourth	91.9	5.7
Three	91.5	6.3
Two	86.4	1.8
One	99.7	7.3
HOSTALS: Silver stars		
Three and two	90.6	4.7
One	98.1	6.0

Indicators on the Profitability of the Hotel Sector

March 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	73.9	8.2	41.2	15.0
Andalucía	61.1	5.3	31.5	16.2
Aragón	56.7	1.2	20.4	17.7
Asturias, Principado de	45.7	-6.0	16.2	26.0
Balears, Illes	61.0	10.4	35.3	10.3
Canarias	88.1	4.2	73.4	1.9
Cantabria	56.4	3.3	18.5	19.7
Castilla y León	51.6	3.2	17.2	21.3
Castilla - La Mancha	53.3	3.4	15.5	12.5
Cataluña	101.0	29.6	59.1	44.9
Comunitat Valenciana	51.3	2.8	28.4	10.4
Extremadura	55.0	6.2	17.5	20.5
Galicia	48.8	1.4	13.9	18.8
Madrid, Comunidad de	75.8	4.3	48.7	8.9
Murcia, Región de	49.7	0.9	24.4	7.8
Navarra, Comunidad Foral de	57.1	3.0	22.0	10.0
País Vasco	65.4	2.7	32.0	16.7
Rioja, La	59.9	2.1	26.9	-4.2
Ceuta	73.1	4.9	33.5	-11.3
Melilla	65.7	3.3	40.9	-5.5

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	73.9	8.2	41.2	15.0
HOTELS: Gold stars				
Five	169.7	13.3	106.1	17.8
Four	78.5	6.7	51.5	11.2
Three	55.5	9.5	33.0	15.8
Two	49.3	5.7	19.2	20.6
One	51.9	15.3	17.2	30.6
GUESTHOUSES: Silver stars				
Three and two	45.1	10.3	13.6	24.5
One	35.5	9.5	9.9	25.1

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room