

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
September 2014. *Provisional data*

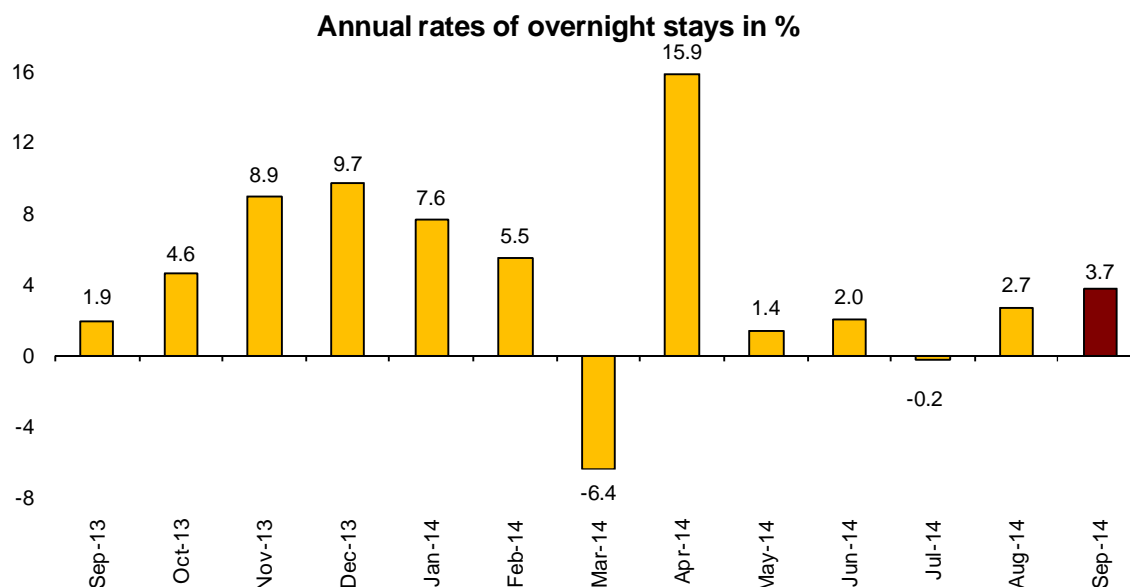
Overnight stays in hotel establishments registered an increase of 3.7% in September, as compared to the same month of 2013

Hotels invoice an average of 76.7 euros per available room, which means an increase of 6.2%, as compared with the same month of 2013

In September, a total of 33.8 million overnight stays were registered in hotel establishments, indicating an increase of 3.7% as compared with the same month of 2013. Overnight stays for residents in Spain increased 5.9% while those of non-residents did so by 2.8%.

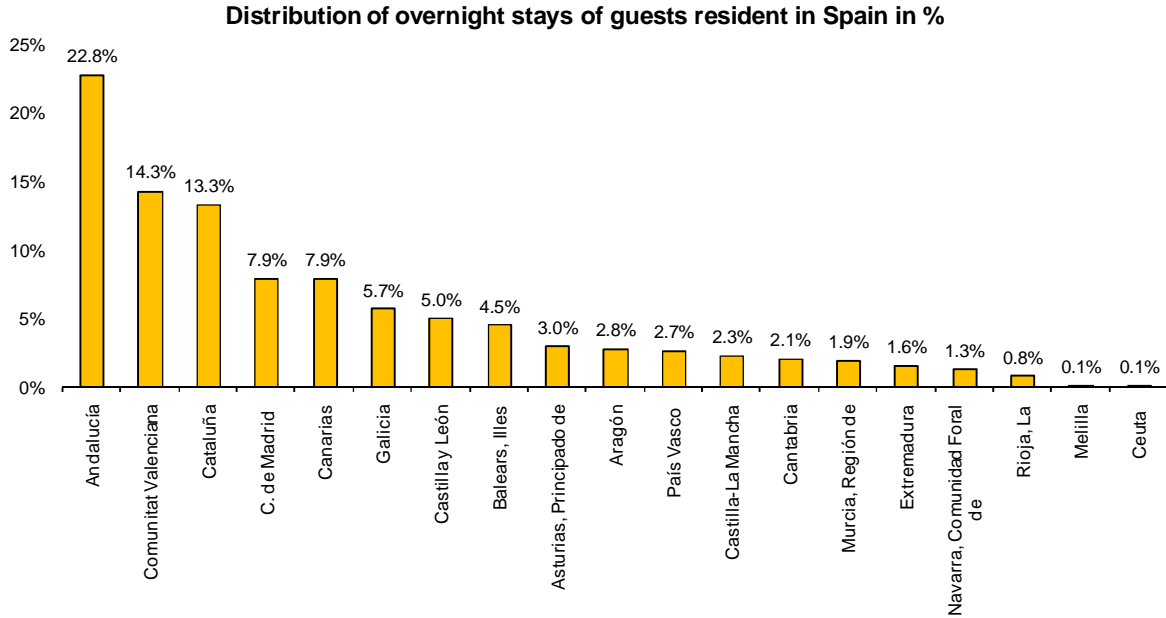
The average stay decreased 1.1%, as compared with September 2013, standing at 3.6 nights per guest.

In the first nine months of 2014, overnight stays increased 2.9% as compared with the same period of the previous year.

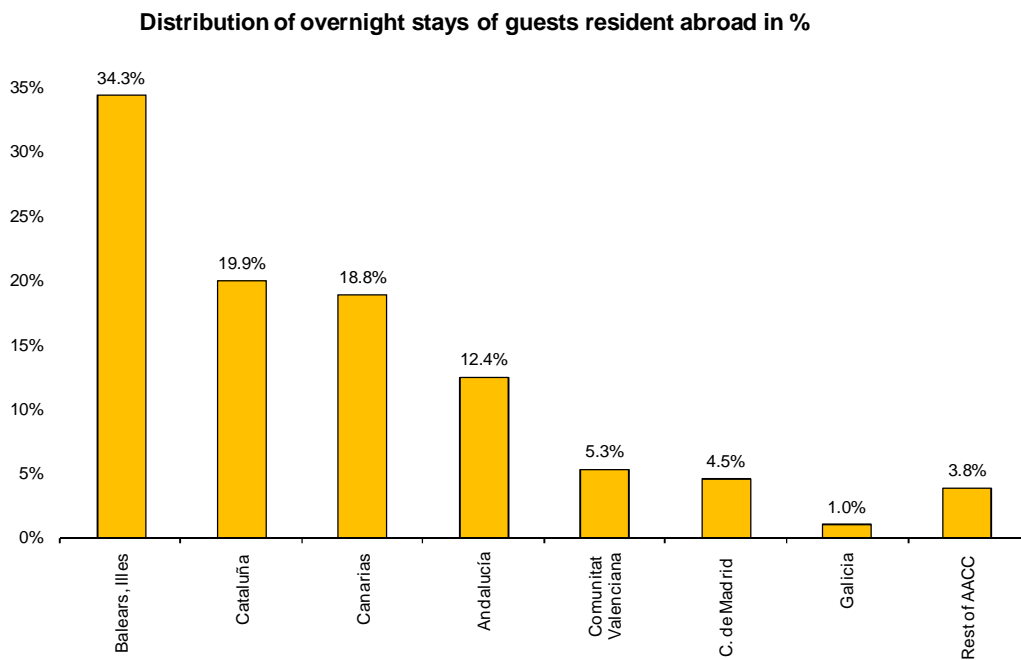


Main destinations

In September, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 5.9%, 1.6%, 17.4% and 7.5%, respectively.



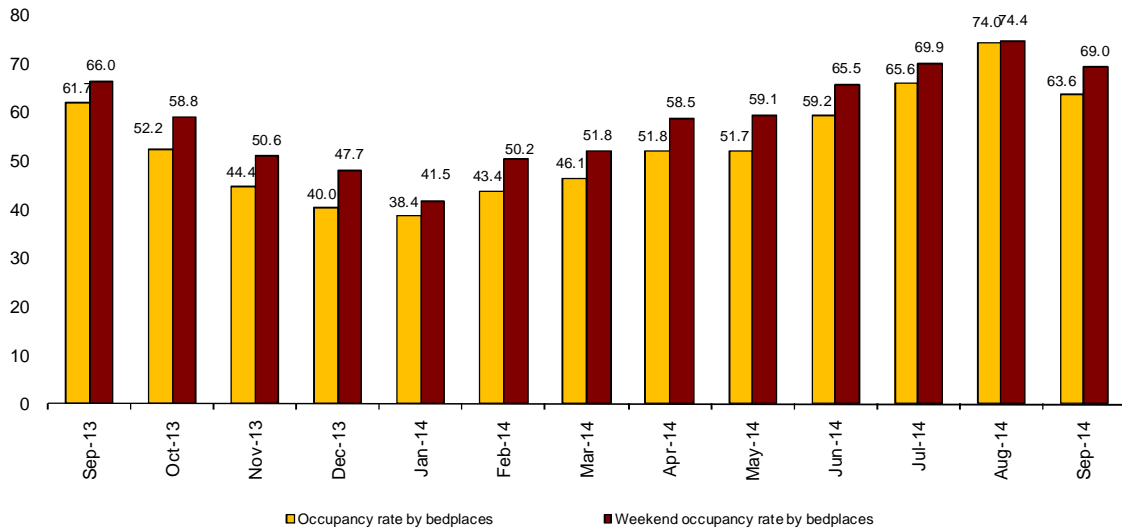
The main destination chosen by non-residents was Illes Balears, with 34.3% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 1.1%, as compared with September 2013. Illes Balears was followed by Cataluña (19.9% of the total and a 2.7% decrease of overnight stays) and Canarias (18.8% of the total and an increase of 8.4% of overnight stays by non-residents).



Hotel Occupancy

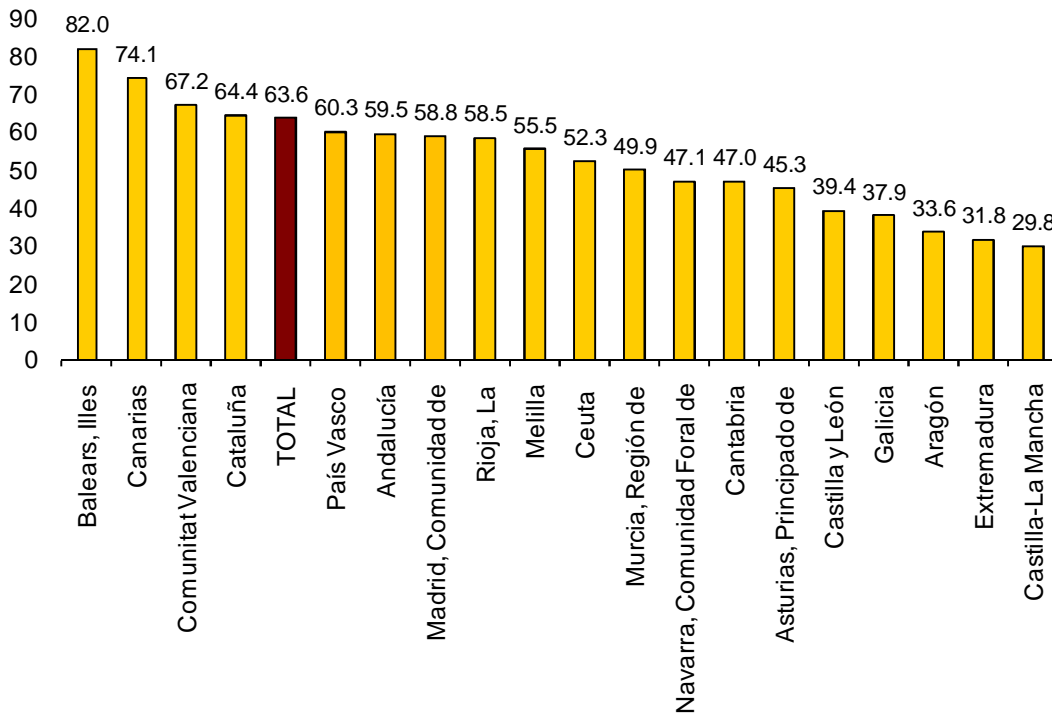
In September, 63.6% of the available bedplaces were occupied, indicating an annual increase of 3.1%. The weekend occupancy rate by bedplaces increased by 4.5%, standing at 69.0%.

Occupancy rate and weekend occupancy rate by bedplaces



Illes Balears registered the greatest occupancy rate by bedplaces in September (82.0%), followed by Canarias (74.1%) and Comunitat Valenciana (67.2%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the island of Menorca registered in September the highest occupancy rate, both by bedplaces (83.7%) and by weekend occupancy (84.0%). It also recorded the highest number of overnight stays, with more than 6.3 million.

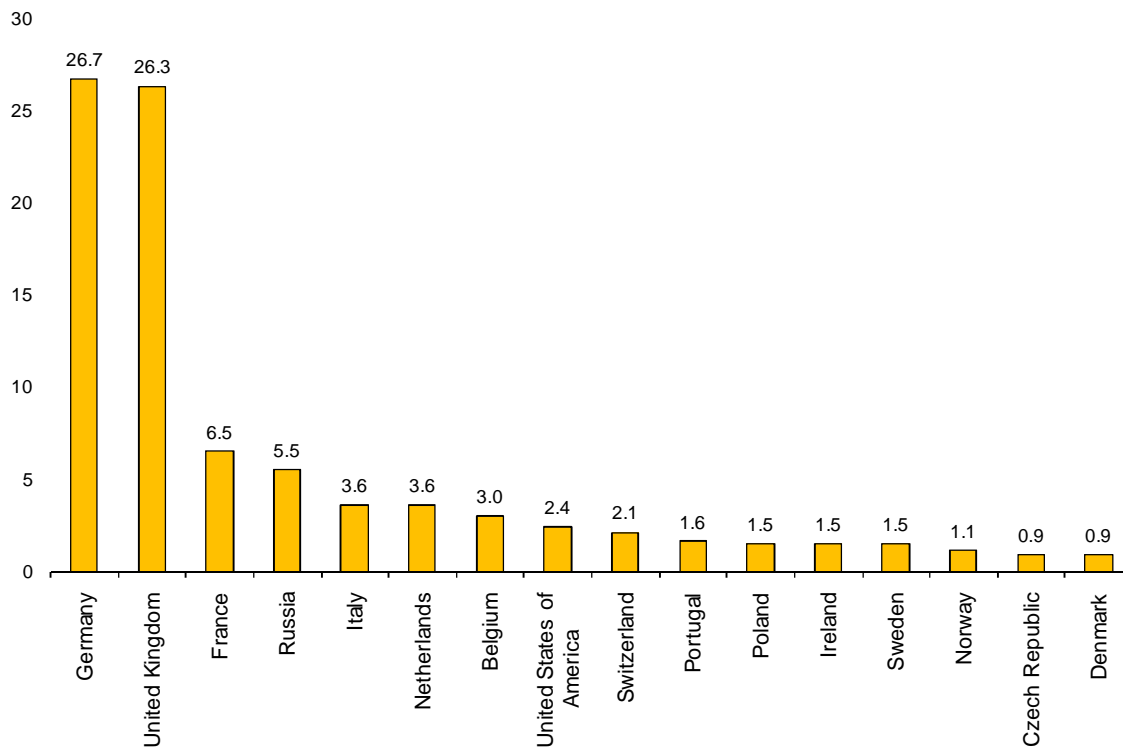
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Santa Margalida reached the highest occupancy rate by bedplaces (93.9%) and Santa Lluçmajor the highest weekend occupancy rate (96.7%).

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom concentrated 26.7% and 26.3%, respectively, of the total of overnight stays in hotel establishments by non-residents in September. The British market experienced a decrease of 1.1% and the German market increased by 5.4%.

Overnight stays of guests from France, Russia, and Italy (the following countries of origin) registered annual rates of 9.9%, -20.3% and 0.3%, respectively.

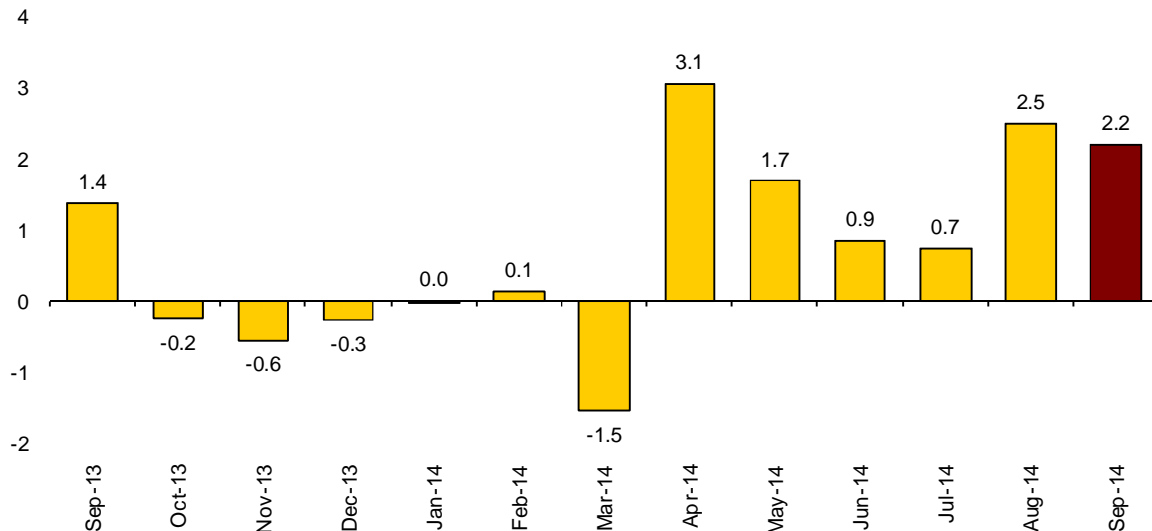
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 2.2% in September, that is, 0.3 points lower than that of the previous month and the 0.8 points over that registered in the previous year.

Hotel Prices Index. Annual variation rate



Illes Balears, Cataluña, Andalucía and Canarias were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of September (they represented 75.2% of the total). Hotel prices increased 4.1% in the annual rate in Illes Balears, 3.3% in Canarias, and 1.5% in Andalucía. In turn, they decreased in Cataluña by 0.3%.

By hotel category, the increases in hotel prices were registered in five-golden-star establishments (3.9%), three-golden-star hotels (3.0%), one-golden-star hotels (2.3%), three and two-silver-star hotels (2.1%), four-golden-star establishments (1.8%), and two-golden-star hotels (0.5%).

In turn, the prices registered a decrease in one-silver-star establishments (5.1%).

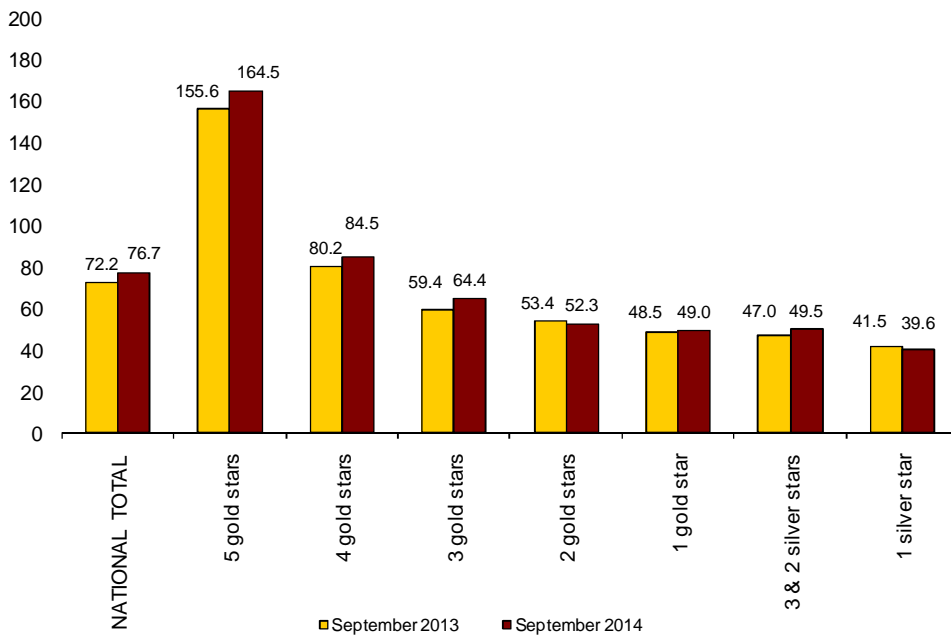
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in September was 76.7 euros, which represented an increase of 6.2% as compared with the same month of 2013.

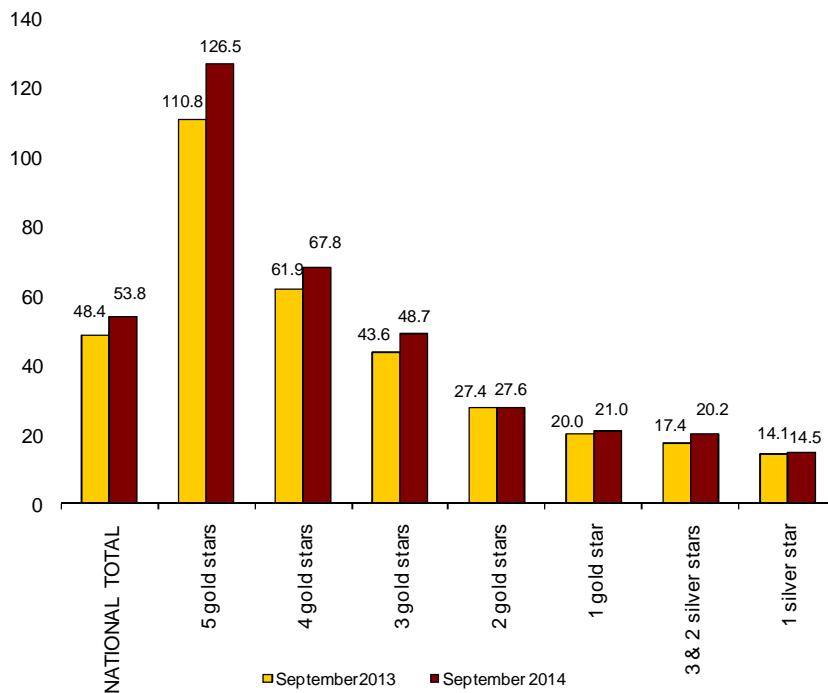
In turn, the daily average revenue per available room (RevPAR), that is conditioned by the occupancy registered in hotel establishments, reached 53.8 euros, with an increase of 11.0%.

By category, the average invoicing was 164.5 euros for five-star hotels, 84.5 euros for four-star hotels and 64.4 euros for three-star hotels. Income per available room for the same categories was 126.5, 67.8, and 48.7 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)

September 2014

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	9,320,009	4,248,164	5,071,845	33,865,799	10,522,047	23,343,752	3.63
HOTELS: Golden stars							
Five	474,578	147,183	327,395	1,689,452	348,238	1,341,214	3.56
Four	4,162,534	1,826,300	2,336,235	15,983,099	4,711,822	11,271,278	3.84
Three	2,809,758	1,225,339	1,584,419	11,572,210	3,283,987	8,288,223	4.12
Two	717,248	409,662	307,586	1,940,521	894,636	1,045,885	2.71
One	277,614	166,725	110,889	652,034	330,415	321,620	2.35
INNS: Silver stars							
Two and three	480,085	280,009	200,076	1,116,476	527,317	589,159	2.33
One	398,192	192,946	205,246	912,006	425,631	486,374	2.29
Annual rate	4.88	4.75	4.98	3.73	5.86	2.80	-1.09
Cumulative annual rate	4.37	4.42	4.33	2.89	3.49	2.57	-1.42

2. Open establishments, capacity, occupancy and employed personnel by category of establishment

Category	Estimated open establishments	Estimated bed-places	Occupancy rate			Employed personnel
			Of bed-places	Of bed-places at weekend	Of bedrooms	
TOTAL	16,554	1,746,006	63.56	69.02	70.03	230,178
HOTELS: Golden stars						
Five	274	84,956	65.30	72.56	77.03	26,823
Four	2,355	735,942	70.95	75.84	80.31	108,843
Three	2,981	537,944	70.48	75.26	75.92	61,980
Two	2,136	136,169	47.14	56.35	52.00	12,270
One	1,350	57,296	37.70	44.01	42.98	4,865
INNS: Silver stars						
Two and three	3,256	100,821	36.63	43.22	40.48	8,247
One	4,201	92,878	32.63	37.68	36.72	7,150
Annual rate	0.48	0.71	3.10	4.52	4.10	1.19

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									
Isla de Mallorca	59,480	905,538	228,694	6,125,681	83.73	84.02	88.09	6.58	34,430
Isla de Lanzarote	24,017	78,218	151,578	695,080	80.89	79.51	92.53	8.28	5,950
Islas de Ibiza-Formentera	39,132	212,578	149,667	1,337,660	79.80	82.64	83.88	5.91	8,906
Isla de Fuerteventura	18,180	100,618	111,351	962,979	79.38	77.39	88.19	9.04	7,110
Palma - Calvià	31,002	378,810	119,236	2,147,840	79.29	81.37	84.65	5.53	13,474
Costa Blanca	169,029	167,641	734,325	877,067	77.61	83.34	80.59	4.79	9,149
Sur de Tenerife	35,779	165,494	155,511	1,387,692	76.66	78.56	86.13	7.67	12,701
Costa de Gipuzkoa	30,558	38,204	60,654	82,718	74.19	83.05	83.63	2.09	1,158

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

Costa del Sol	174,291	300,374	556,154	1,397,777	72.47	76.53	82.59	4.12	12,728
Isla de Tenerife	71,283	195,577	297,364	1,620,425	73.65	75.62	81.27	7.19	15,660
Barcelona	124,565	529,476	246,484	1,487,183	73.82	79.35	86.27	2.65	12,961
Costa Brava	120,656	234,547	295,741	1,164,878	61.86	68.99	65.93	4.11	8,213
Costa Daurada	115,239	145,180	396,680	1,000,469	70.64	74.86	78.33	5.37	6,411
Isla de Gran Canaria	58,854	121,642	234,061	1,058,162	70.15	72.24	77.02	7.16	10,620
Sur de Gran Canaria	38,945	113,889	183,730	1,020,333	73.62	75.41	80.08	7.88	9,678
Costa de la Luz de Cádiz	118,402	74,002	372,673	365,907	60.82	66.45	72.25	3.84	5,883

Tourist site with a greater occupancy rate per month

Santa Margalida	1,049	46,559	3,941	398,180	93.87	93.34	96.06	8.45	1,884
Llucmajor	10,523	55,165	39,983	300,300	93.81	96.68	88.89	5.18	1,487
Alcúdia	2,593	67,572	10,904	513,403	89.26	87.95	90.33	7.47	2,748
Capdepera	1,759	61,128	4,324	474,558	88.75	89.49	94.20	7.61	1,937
Son Servera	120	32,231	175	282,670	88.62	88.00	92.52	8.74	1,123
Benidorm	81,933	99,507	500,430	613,664	88.57	92.08	89.18	6.14	5,506
Muro	2,099	52,562	9,611	402,348	88.04	88.10	93.93	7.54	2,344
Eivissa	12,468	48,464	35,014	232,187	85.81	91.76	90.07	4.39	2,144
Pollença	4,426	19,247	7,400	133,035	85.61	85.88	91.31	5.93	1,155
Santanyí	1,424	39,664	5,358	305,678	85.48	84.90	91.91	7.57	2,026

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

Barcelona	115,220	507,816	227,854	1,425,757	74.96	80.43	87.05	2.65	12,486
Madrid	346,225	404,236	597,610	944,469	63.10	71.60	79.11	2.05	11,222
Calvià	9,659	169,777	48,419	1,126,663	76.43	76.07	82.81	6.55	6,673
Palma	19,999	191,772	66,734	933,411	81.29	86.16	85.68	4.72	6,225
San Bartolomé de Tirajana	30,087	85,870	144,178	781,776	75.27	77.15	81.63	7.99	7,722
Salou	43,345	86,962	181,571	658,000	79.00	82.21	86.80	6.44	3,395
Adeje	15,839	86,372	77,505	741,894	77.88	80.10	86.79	8.02	6,986
Lloret de Mar	27,326	97,990	93,177	628,555	74.34	77.55	77.02	5.76	2,745
Pájara	8,769	66,219	53,679	635,716	83.79	81.66	90.56	9.19	4,726
Sant Llorenç des Cardassar	1,355	60,757	7,184	552,093	83.52	81.75	91.67	9.00	2,960

* 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	9,320,009	100.00	33,865,799	100.00
Residents in Spain	4,248,164	45.58	10,522,047	31.07
Residents abroad	5,071,845	54.42	23,343,752	68.93
Total Residents abroad	5,071,845	100.00	23,343,752	100.00
Total Residents in E.U. (without Spain)	3,682,226	72.60	18,865,607	80.82
- Germany	955,802	18.85	6,222,749	26.66
- Austria	46,307	0.91	208,381	0.89
- Belgium	134,122	2.64	695,402	2.98
- Denmark	49,516	0.98	217,934	0.93
- Finland	29,793	0.59	114,709	0.49
- France	488,406	9.63	1,509,332	6.47
- Greece	9,700	0.19	28,964	0.12
- Ireland	81,778	1.61	352,780	1.51
- Italy	236,989	4.67	850,321	3.64
- Luxembourg	8,606	0.17	51,832	0.22
- Netherlands	178,105	3.51	840,734	3.60
- Poland	73,864	1.46	354,672	1.52
- Portugal	121,220	2.39	366,278	1.57
- United Kingdom	1,068,565	21.07	6,149,277	26.34
- Czech Republic	35,282	0.70	220,049	0.94
- Sweden	76,212	1.50	341,395	1.46
- Other EU countries*	87,959	1.73	340,800	1.46
Norway	59,630	1.18	248,049	1.06
Russia	176,568	3.48	1,281,666	5.49
Switzerland	109,099	2.15	481,588	2.06
Rest of Europe	90,265	1.78	345,007	1.48
Japan	61,824	1.22	113,971	0.49
United States of America	248,509	4.90	553,604	2.37
Rest of America	269,591	5.32	620,233	2.66
Africa	50,386	0.99	115,814	0.50
Other countries	323,747	6.38	718,213	3.08

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

Hotel Price Index (HPI). 2008 Base

September 2014

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	95.1	2.2
Andalucía	87.8	1.5
Aragón	64.9	-0.1
Asturias, Principado de	85.1	-3.1
Balears, Illes	108.3	4.1
Canarias	101.7	3.3
Cantabria	87.8	3.3
Castilla y León	87.0	0.9
Castilla - La Mancha	81.6	-0.4
Cataluña	98.0	-0.3
Comunitat Valenciana	87.8	1.9
Extremadura	83.8	-1.9
Galicia	89.4	0.3
Madrid, Comunidad de	80.5	4.7
Murcia, Región de	79.7	0.8
Navarra, Comunidad Foral de	82.0	-1.0
País Vasco	99.5	3.1
Rioja, La	85.8	-2.5
Ceuta	104.5	-1.3
Melilla	100.6	3.0

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	95.1	2.2
HOTELS: Gold stars		
Five	90.8	3.9
Fourth	93.2	1.8
Three	99.7	3.0
Two	92.6	0.5
One	100.7	2.3
HOSTALS: Silver stars		
Three and two	91.8	2.1
One	93.2	-5.1

Indicators on the Profitability of the Hotel Sector

September 2014

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	76.7	6.2	53.8	11.0
Andalucía	75.7	3.0	51.9	8.1
Aragón	51.9	1.9	19.5	2.7
Asturias, Principado de	54.7	-0.1	27.1	13.6
Balears, Illes	81.9	10.7	71.4	12.3
Canarias	79.4	5.7	64.9	10.4
Cantabria	64.5	10.8	32.2	17.2
Castilla y León	54.0	1.2	23.9	12.0
Castilla - La Mancha	56.2	2.4	19.4	10.1
Cataluña	84.2	6.8	60.7	8.4
Comunitat Valenciana	66.0	2.5	47.0	9.4
Extremadura	51.8	-2.7	18.7	0.7
Galicia	54.0	1.1	22.9	6.8
Madrid, Comunidad de	83.0	10.0	61.1	27.5
Murcia, Región de	62.0	-4.2	34.1	5.8
Navarra, Comunidad Foral de	58.6	-2.9	30.3	5.4
País Vasco	83.4	4.6	59.0	11.1
Rioja, La	60.7	-1.9	39.3	3.0
Ceuta	74.6	9.2	41.8	18.9
Melilla	65.3	1.2	45.0	4.6

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	76.7	6.2	53.8	11.0
HOTELS: Gold stars				
Five	164.5	5.7	126.5	14.2
Four	84.5	5.4	67.8	9.6
Three	64.4	8.3	48.7	11.8
Two	52.3	-2.0	27.6	1.0
One	49.0	1.0	21.0	5.0
GUESTHOUSES: Silver stars				
Three and two	49.5	5.3	20.2	16.0
One	39.6	-4.7	14.5	3.3

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