

23 October 2015

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

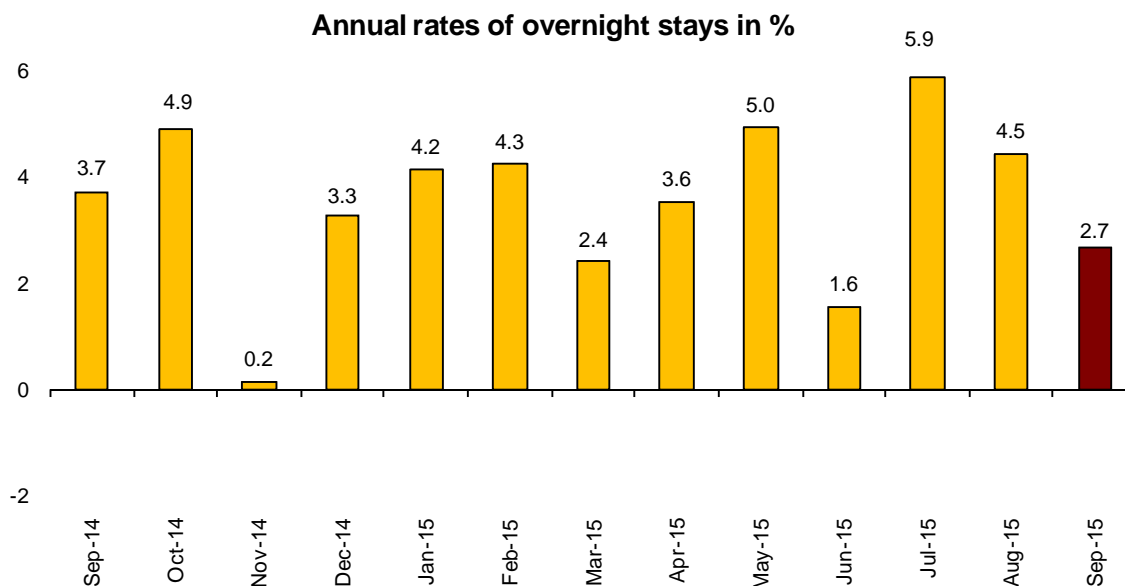
Overnight stays in hotel establishments register an increase of 2.7% in September, as compared to the same month of 2014

Hotels invoice an average of 80.0 euros per occupied room, which means an annual increase of 5.5%

In September, a total of 34.7 million overnight stays were registered in hotel establishments, 2.7% more than in the same month of 2014. Overnight stays for residents in Spain increased by 3.7% and those of non-residents did so by 2.2%.

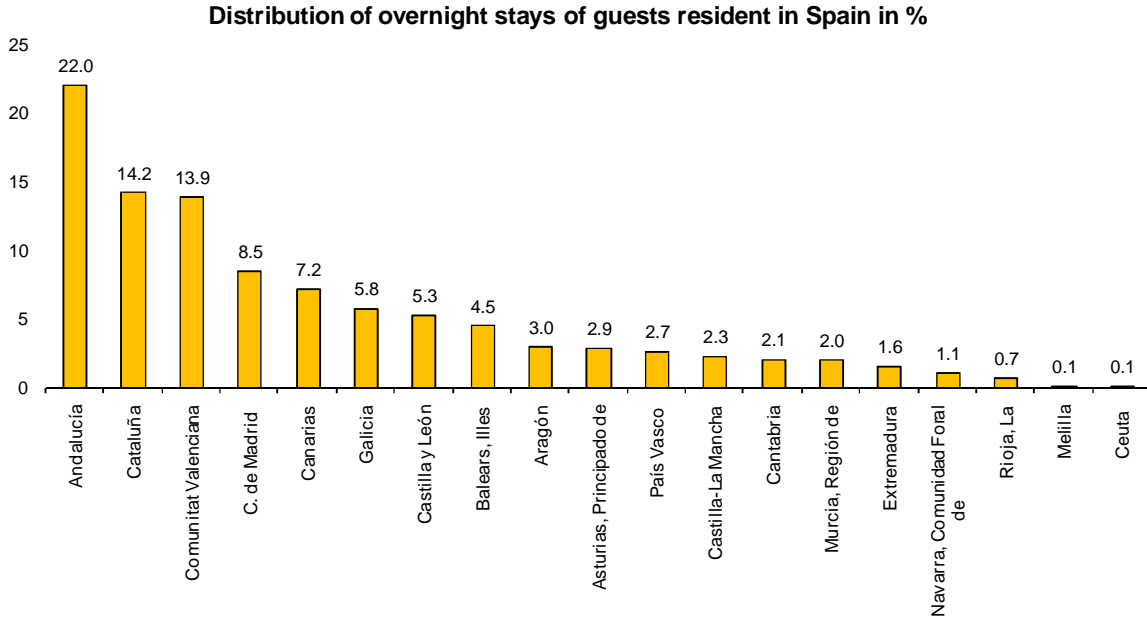
The average stay decreased 1.4%, as compared to September 2014, standing at 3.6 nights per guest.

During the first nine months of 2015, overnight stays increased 3.8%, as compared to the same period of the previous year.

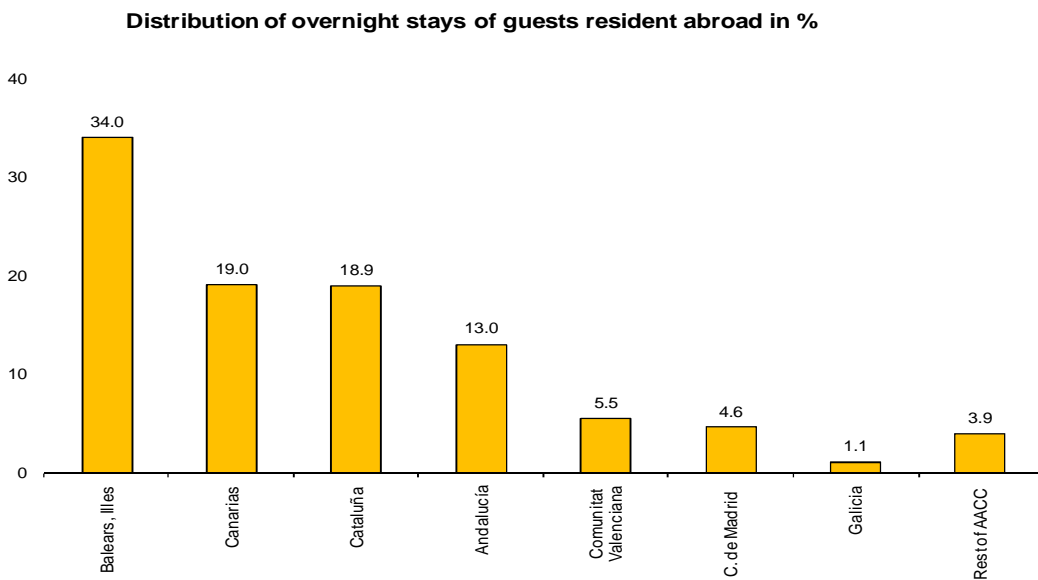


Main destinations

In September, 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 -0.1%, 10.7%, 0.8% and 11.7%, respectively.

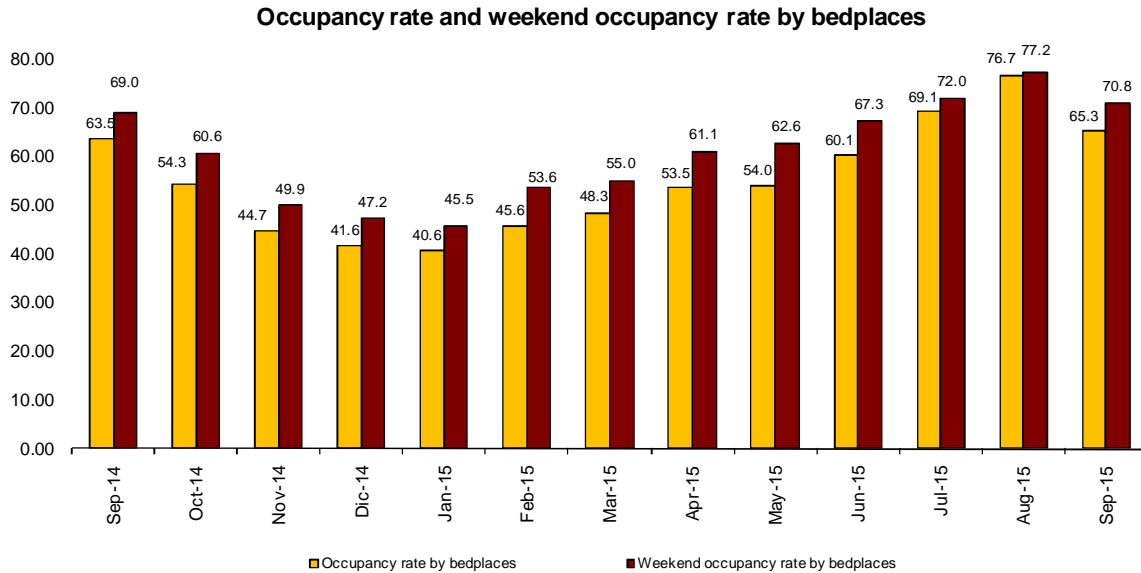


The main destination chosen by non-residents was Illes Balears, with 34.0% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 1.1% as compared to September 2014. The following destinations of non-residents were Canarias (19.0% of the total and an increase of 2.9% in overnight stays) and Cataluña (18.9% and a decrease of 2.8% in overnight stays).



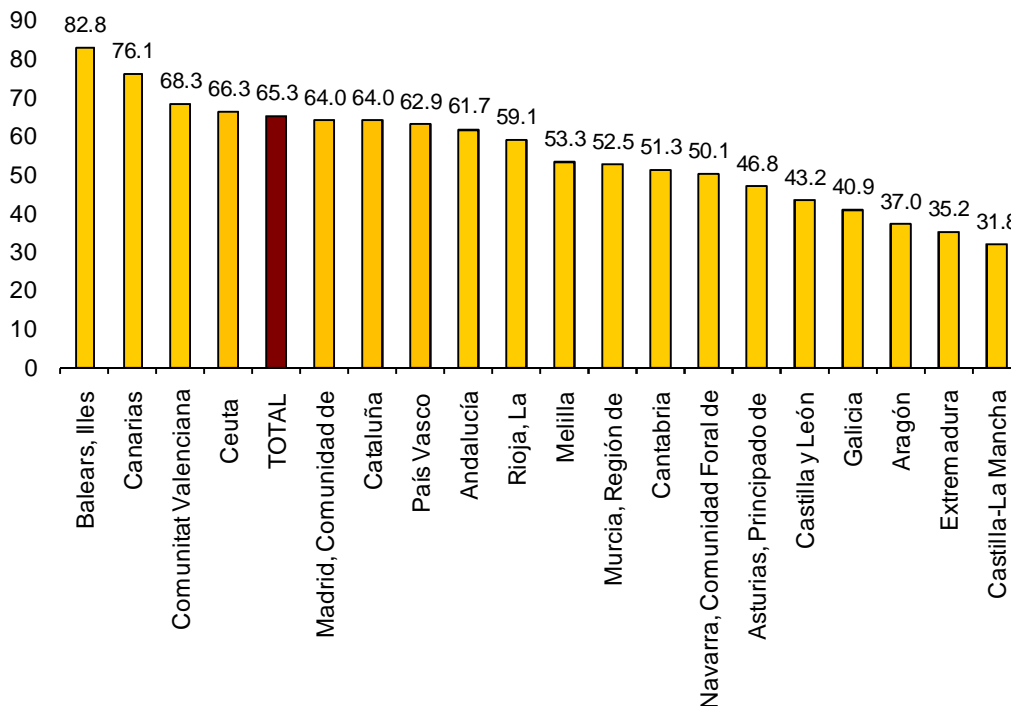
Hotel Occupancy

In September, 65.3% of the available bedplaces were occupied, indicating an annual increase of 2.8%. The weekend occupancy rate by bedplaces increased by 2.6%, standing at 70.8%.



Illes Balears registered the greatest occupancy rate by bedplaces in September (82.8%), followed by Canarias (76.1%) and Comunitat Valenciana (68.3%).

Occupancy rate by bedplaces by Autonomous Community



By tourist area, the island of Mallorca registered the highest occupancy rate by bedplaces (84.2%), while Costa Blanca recorded the highest weekend occupancy rate (85.1%). The island of Mallorca recorded the highest number of overnight stays, with more than 6.4 million.

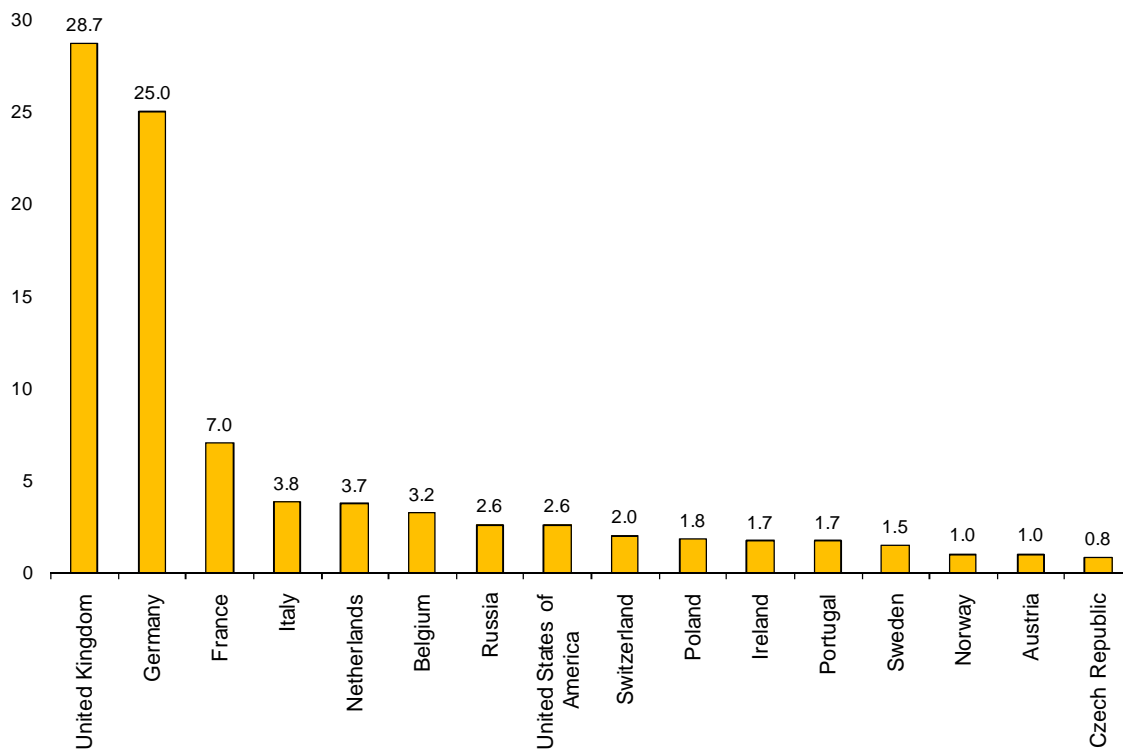
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Lluçmajor reached both the highest occupancy rate by bedplaces (91.4%) and the greatest weekend occupancy rate (92.7%).

Overnight stays according to the country of origin of the guests

Guests from United Kingdom and Germany concentrated 28.7% and 25.0%, respectively, of the total of overnight stays in hotel establishments by non-residents in September. The British market increased by 11.5%, while the German one decreased by 4.3%.

Overnight stays of guests from France, Italy and Netherlands (the following countries of origin) registered annual rates of 9.6%, 8.0% and 4.9%, respectively.

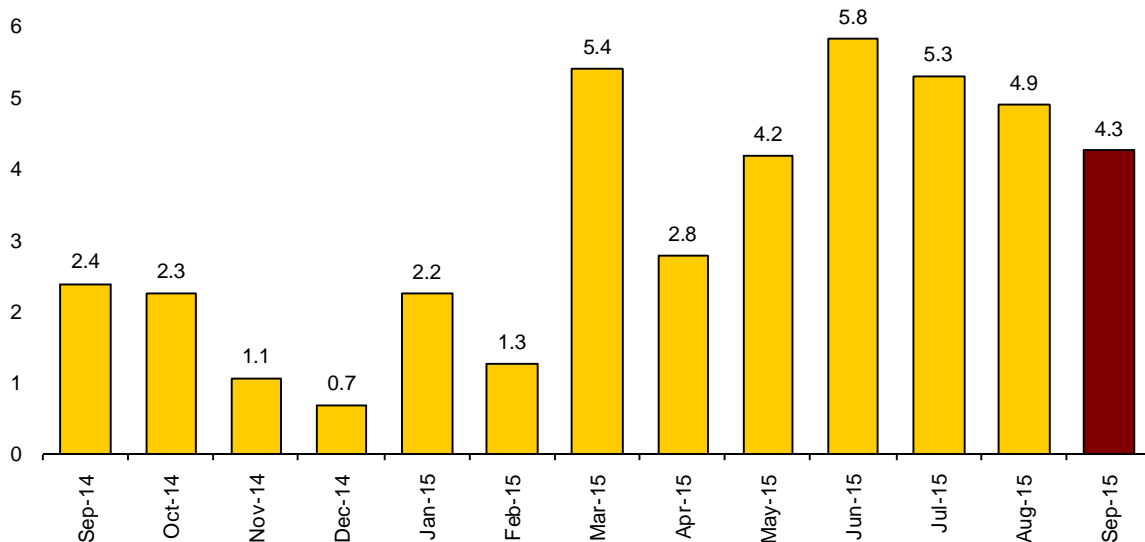
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 4.3% in September, that is, 0.6 points less than that of the previous month and 1.9 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 74.3% of the total). Hotel prices increased 6.3% in the annual rate in Andalucía, 4.9% in Illes Balears, and 3.7% in both Canarias and Cataluña.

By hotel category, increase in hotel prices were registered in all of them: one-silver-star establishments (9.5%), one-golden-star establishments (9.1%), two-golden-star establishments (6.5%), three-silver-star and two-silver-star establishments (5.9%), three-golden-star establishments (5.0%), five-golden-star establishments (4.4%), and four-golden-star establishments (3.3%).

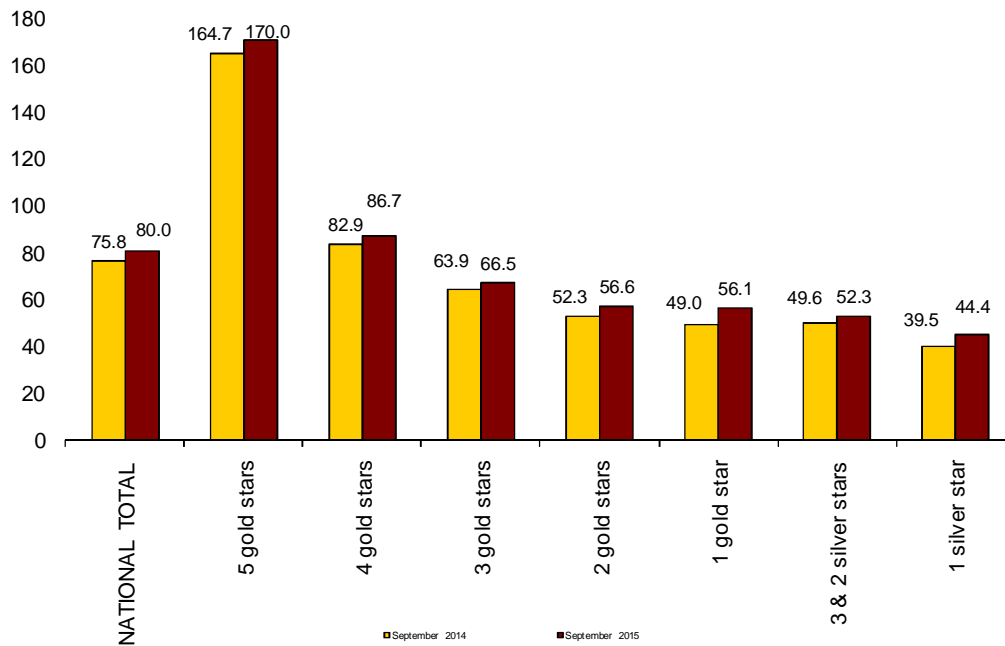
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in September was 80.0 euros, which represented an increase of 5.5% as compared to the same month of 2014.

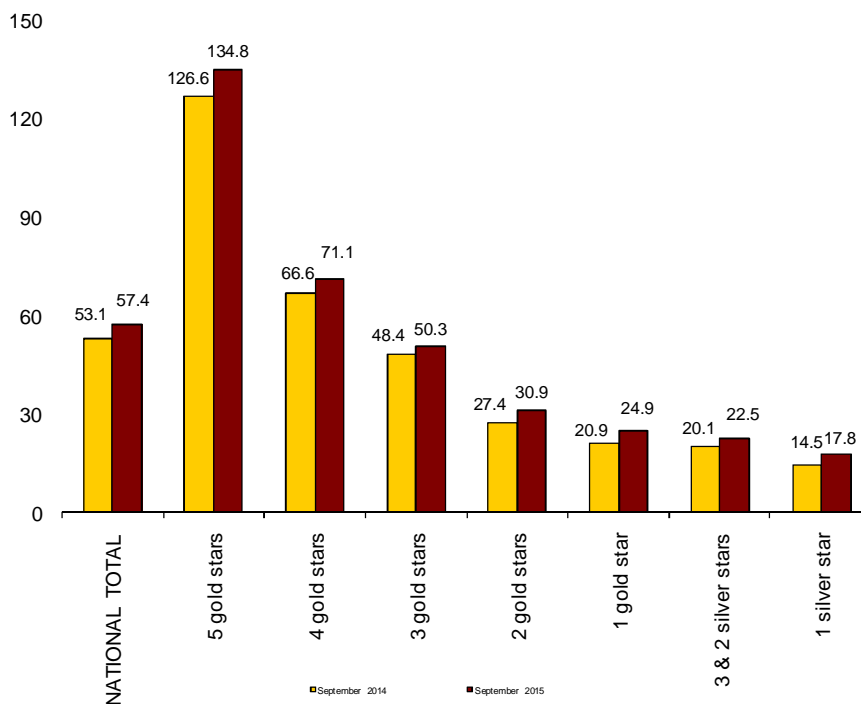
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 57.4 euros, with an increase of 8.0%.

By category, the average invoicing was 170.0 euros for five-star hotels, 86.7 euros for four-star hotels and 66.5 euros for three-star hotels. Income per available room for the same categories was 134.8, 71.1, and 50.3 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 – 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)

September 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	9.722.297	4.487.814	5.234.483	34.760.137	10.944.429	23.815.708	3,58
HOTELS: Golden stars							
Five	505.274	144.338	360.936	1.875.325	355.422	1.519.903	3,71
Four	4.443.597	1.952.610	2.490.987	16.978.550	4.989.326	11.989.224	3,82
Three	2.739.023	1.260.253	1.478.770	11.084.010	3.289.800	7.794.209	4,05
Two	760.510	441.497	319.013	2.019.479	946.673	1.072.806	2,66
One	305.802	181.441	124.362	679.098	353.167	325.931	2,22
INNS: Silver stars							
Two and three	523.930	305.232	218.698	1.166.481	574.802	591.679	2,23
One	444.162	202.443	241.719	957.194	435.238	521.956	2,16
Annual rate	4,06	5,06	3,22	2,66	3,70	2,19	-1,35
Cumulative annual rate	5,54	6,17	4,91	3,84	5,97	2,68	-1,61

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	16.360	838.218	1.740.110	65,28	70,84	71,82	236.293
HOTELS: Golden stars							
Five	283	42.779	88.945	69,36	75,09	79,41	29.213
Four	2.413	351.641	757.069	72,89	78,26	81,95	114.038
Three	2.945	245.084	514.108	70,57	74,76	76,54	60.527
Two	2.141	69.345	134.491	49,58	58,59	54,05	12.222
One	1.328	29.189	56.751	39,67	47,99	44,78	5.052
INNS: Silver stars							
Two and three	3.188	51.479	99.162	38,93	46,79	43,31	8.264
One	4.062	48.701	89.584	35,42	41,01	39,94	6.977
Annual rate	-1,39	-0,92	-0,40	2,78	2,64	2,53	2,42

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									
Isla de Mallorca	57.797	882.544	235.888	6.187.350	84,18	84,72	88,83	6,83	35.551
Palma - Calvià	31.770	357.167	106.068	2.174.516	82,63	84,13	87,76	5,86	13.384
Isla de Lanzarote	22.649	85.961	143.845	767.229	81,94	81,90	94,54	8,39	6.074
Isla de Fuerteventura	13.107	106.806	70.523	996.240	80,52	81,68	88,84	8,90	7.341
Costa Blanca	168.504	168.646	749.605	926.199	79,76	85,07	81,21	4,97	9.274
Islas de Ibiza-Formentera	41.960	217.557	165.184	1.295.216	79,60	81,39	80,77	5,63	9.931
Sur de Tenerife	36.170	162.041	158.165	1.346.622	78,25	79,61	85,94	7,59	12.745
Isla de Menorca	18.753	78.142	91.051	617.007	77,50	75,34	88,33	7,31	4.029

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

Costa del Sol	165.331	327.886	475.709	1.559.598	75,46	79,64	85,34	4,13	13.050
Isla de Tenerife	71.069	194.768	299.986	1.585.862	74,94	77,47	81,60	7,09	15.822
Barcelona	120.633	554.192	248.255	1.587.096	76,51	80,52	87,96	2,72	13.238
Costa Brava	136.073	234.722	331.638	1.136.681	62,40	70,83	66,18	3,96	8.731
Isla de Gran Canaria	59.861	135.555	224.234	1.115.769	73,31	74,26	81,76	6,86	11.162
Costa Daurada	154.028	126.168	476.080	842.962	63,36	67,88	73,18	4,71	6.005
Sur de Gran Canaria	40.378	124.051	177.041	1.065.990	76,71	77,66	85,10	7,56	9.968
Costa Barcelona	123.300	198.944	265.145	874.887	64,80	64,00	73,15	3,54	6.518

Tourist site with a greater occupancy rate per month

Llucmajor	8.624	46.641	51.869	293.484	91,35	92,70	88,10	6,25	1.563
Benidorm	82.727	99.339	486.766	650.179	89,08	92,31	88,86	6,24	5.486
Muro	2.284	53.619	14.333	449.113	88,81	88,06	91,24	8,29	2.595
Santa Margalida	1.392	43.655	5.257	361.065	87,63	82,05	85,24	8,13	1.708
Alcúdia	2.279	63.810	15.299	522.635	87,63	90,32	91,67	8,14	2.908
Tías	5.261	26.584	33.369	240.917	87,06	88,99	96,29	8,61	1.531
Sant Llorenç des Cardassar	1.076	66.245	4.928	592.020	85,99	84,97	91,42	8,87	3.211
Santanyi	2.372	40.781	10.442	317.135	85,54	86,82	86,05	7,59	1.637
Ciutadella de Menorca	8.718	35.838	45.741	282.075	85,35	81,62	92,64	7,36	1.735
Pájara	6.221	68.877	40.450	652.941	84,96	86,16	90,68	9,23	4.816

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

Barcelona	111.559	535.404	225.306	1.528.763	77,48	81,44	88,48	2,71	12.547
Madrid	384.219	433.034	668.851	983.511	68,06	76,23	81,47	2,02	10.960
Calvià	7.469	161.072	31.353	1.163.429	81,43	79,68	88,86	7,09	6.603
Palma	20.819	176.017	63.931	928.349	83,07	86,88	87,29	5,04	6.087
San Bartolomé de Tirajana	27.951	83.862	137.080	809.056	78,33	79,59	86,36	8,46	8.018
Salou	57.773	76.170	214.762	582.154	68,68	72,01	79,66	5,95	3.160
Adeje	17.091	82.024	81.226	688.998	79,94	82,51	89,75	7,77	6.461
Lloret de Mar	31.728	97.288	88.864	604.770	73,99	75,89	75,71	5,38	2.721
Torremolinos	37.549	64.451	145.476	372.631	83,45	87,16	89,27	5,08	2.700
Arona	8.190	51.637	40.512	439.187	81,19	79,62	88,40	8,02	3.353

* 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	9.722.297	100,00	34.760.137	100,00
Residents in Spain	4.487.814	46,16	10.944.429	31,49
Residents abroad	5.234.483	53,84	23.815.708	68,51
Total Residents abroad	5.234.483	100,00	23.815.708	100,00
Total Residents in E.U. (without Spain)	3.832.605	73,22	19.753.404	82,94
- Germany	937.392	17,91	5.957.719	25,02
- Austria	52.742	1,01	233.192	0,98
- Belgium	145.783	2,79	762.500	3,20
- Denmark	48.859	0,93	194.709	0,82
- Finland	26.918	0,51	88.097	0,37
- France	510.483	9,75	1.661.842	6,98
- Greece	9.230	0,18	23.824	0,10
- Ireland	88.035	1,68	403.016	1,69
- Italy	252.418	4,82	907.214	3,81
- Luxembourg	8.434	0,16	54.794	0,23
- Netherlands	187.577	3,58	878.987	3,69
- Poland	89.034	1,70	423.568	1,78
- Portugal	128.789	2,46	399.566	1,68
- United Kingdom	1.138.990	21,76	6.834.896	28,70
- Czech Republic	35.496	0,68	200.100	0,84
- Sweden	76.336	1,46	345.290	1,45
- Other EU countries*	96.090	1,84	384.089	1,61
Norway	56.290	1,08	239.445	1,01
Russia	95.843	1,83	620.826	2,61
Switzerland	109.099	2,08	476.264	2,00
Rest of Europe	103.855	1,98	380.278	1,60
Japan	60.700	1,16	112.039	0,47
United States of America	273.906	5,23	608.905	2,56
Rest of America	272.999	5,22	633.244	2,66
Africa	53.145	1,02	127.291	0,53
Other countries	376.041	7,18	864.011	3,63

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

Hotel Price Index (HPI). 2008 Base

September 2015

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	99,4	4,3
Andalucía	93,1	6,3
Aragón	66,2	2,4
Asturias, Principado de	87,3	2,3
Balears, Illes	114,4	4,9
Canarias	106,6	3,7
Cantabria	88,3	-0,4
Castilla y León	88,4	1,7
Castilla - La Mancha	82,8	1,7
Cataluña	101,2	3,7
Comunitat Valenciana	92,4	5,9
Extremadura	87,3	4,0
Galicia	93,0	4,2
Madrid, Comunidad de	81,7	1,3
Murcia, Región de	83,1	4,0
Navarra, Comunidad Foral de	83,5	1,5
País Vasco	102,6	2,3
Rioja, La	91,8	7,0
Ceuta	98,1	-6,1
Melilla	103,3	2,7

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	99,4	4,3
HOTELS: Gold stars		
Five	95,6	4,4
Fourth	96,4	3,3
Three	104,9	5,0
Two	98,8	6,5
One	110,0	9,1
HOSTALS: Silver stars		
Three and two	97,4	5,9
One	101,4	9,5

Indicators on the Profitability of the Hotel Sector

September 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	80,0	5,5	57,4	8,0
Andalucía	81,0	6,8	57,1	10,0
Aragón	51,7	0,1	22,3	14,8
Asturias, Principado de	55,6	1,4	29,1	10,1
Balears, Illes	86,1	5,7	74,6	4,8
Canarias	86,3	7,4	73,8	12,2
Cantabria	65,9	3,2	35,3	9,3
Castilla y León	55,9	3,4	26,7	12,2
Castilla - La Mancha	56,5	0,9	21,4	11,1
Cataluña	85,0	7,8	60,3	6,2
Comunitat Valenciana	71,9	8,6	51,8	10,0
Extremadura	55,4	6,8	21,7	17,6
Galicia	56,3	4,4	25,4	10,5
Madrid, Comunidad de	80,1	-3,3	62,3	2,5
Murcia, Región de	65,8	5,9	37,0	8,5
Navarra, Comunidad Foral de	60,9	4,0	35,1	15,0
País Vasco	83,7	0,5	62,4	6,1
Rioja, La	63,7	4,6	42,5	8,1
Ceuta	70,2	-5,8	40,6	-2,7
Melilla	65,7	0,6	46,7	3,8

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	80,0	5,5	57,4	8,0
HOTELS: Gold stars				
Five	170,0	3,2	134,8	6,5
Four	86,7	4,6	71,1	6,8
Three	66,5	4,2	50,3	4,1
Two	56,6	8,2	30,9	12,6
One	56,1	14,5	24,9	19,1
GUESTHOUSES: Silver stars				
Three and two	52,3	5,5	22,5	12,0
One	44,4	12,2	17,8	22,9

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