

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

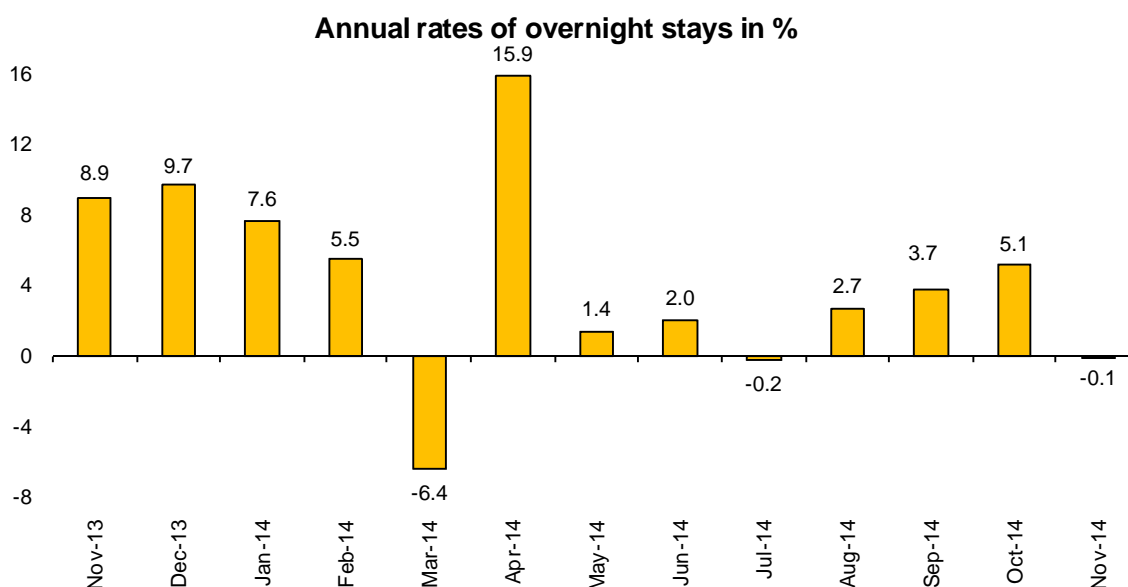
**Overnight stays in hotel establishments registered an increase of 0.1% in November, as compared to the same month of 2013**

**Hotels invoice an average of 70.8 euros per available room, which means an annual increase of 1.8%**

In November, a total of 15.0 million overnight stays were registered in hotel establishments, indicating a decrease of 0.1% as compared to the same month of 2013. Overnight stays for residents in Spain decreased 2.8% while those of non-residents increased by 1.8%.

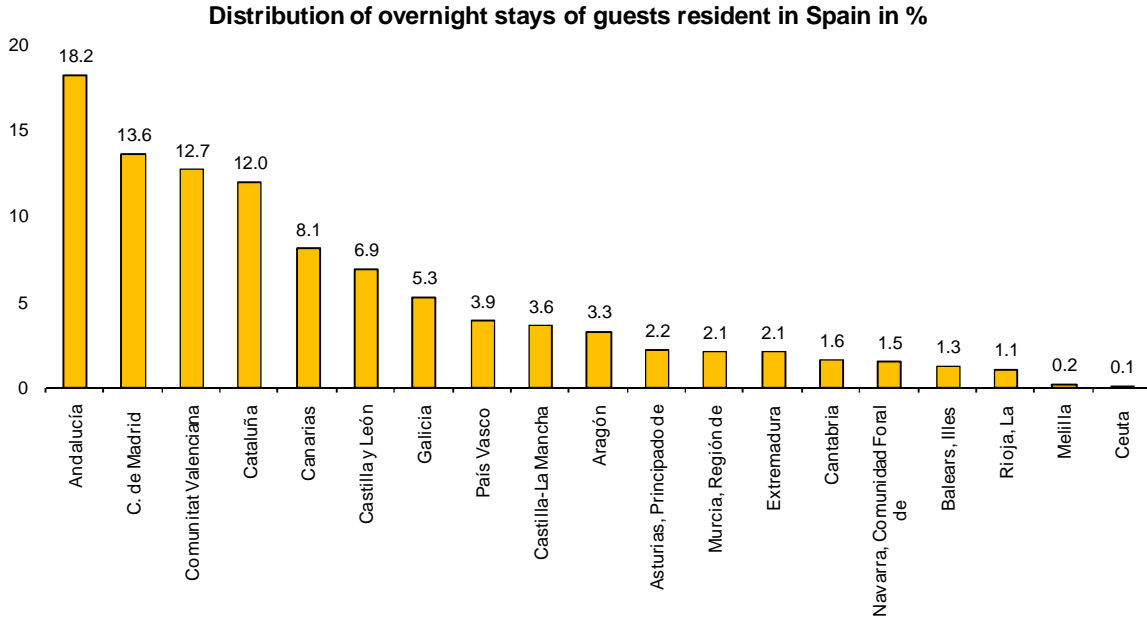
The average stay decreased 0.3%, as compared to November 2013, standing at 2.9 nights per guest.

In the first 11 months of 2014, overnight stays increased 2.9% as compared to the same period of the previous year.

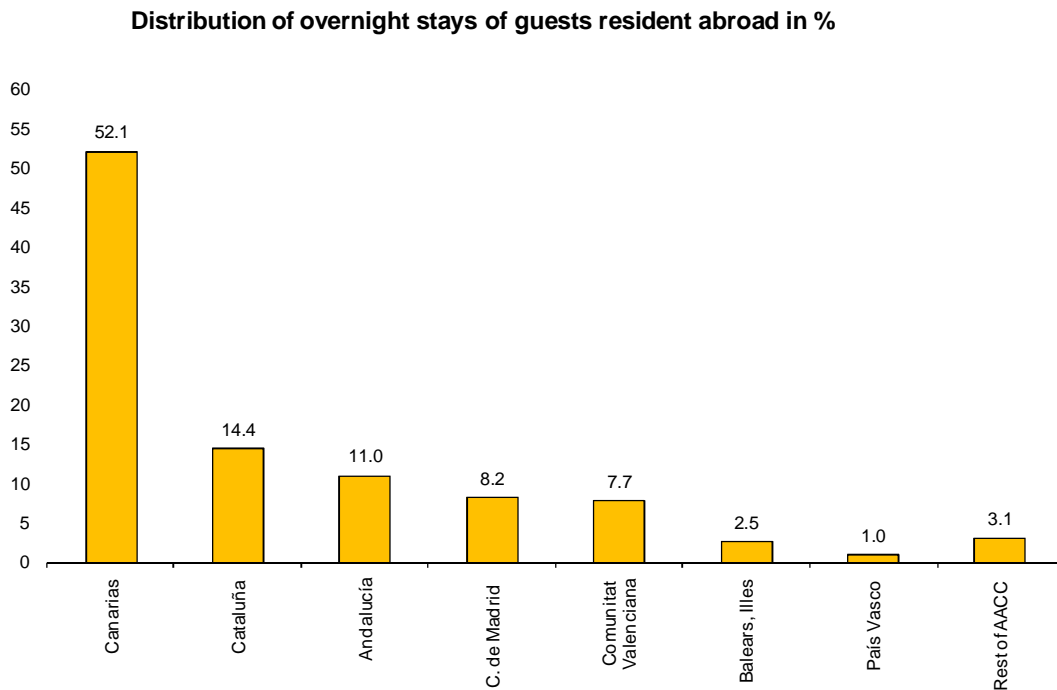


**Main destinations**

In November, 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 1.0%, 1.0%, -4.4% and -3.3%, respectively.



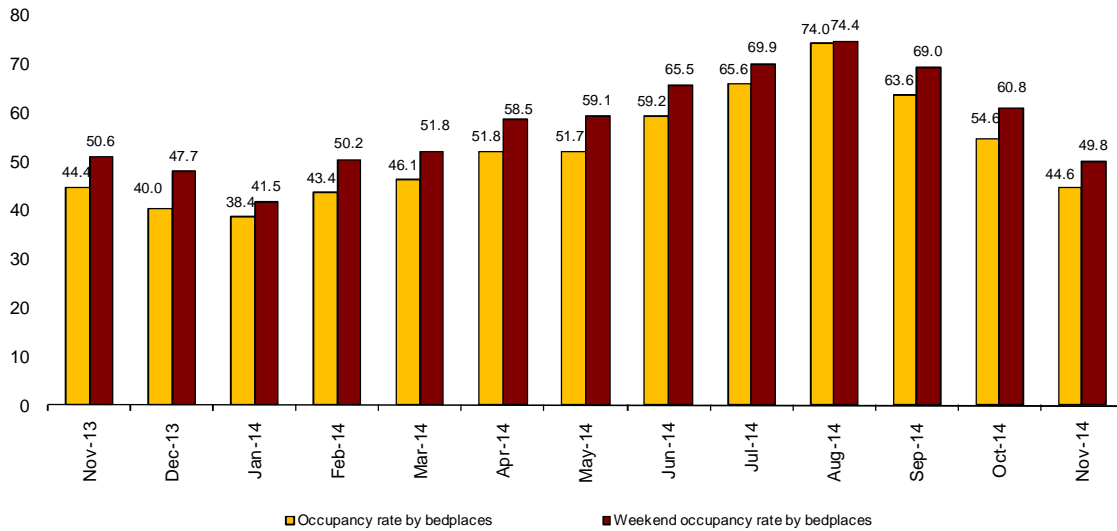
The main destination chosen by non-residents was Canarias, with 52.1% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 0.4% in the annual rate. The following destinations were Cataluña (14.4%) and Andalucía (11.0%). Overnight stays in these communities increased by 0.1% and 5.5%, respectively.



## Hotel Occupancy

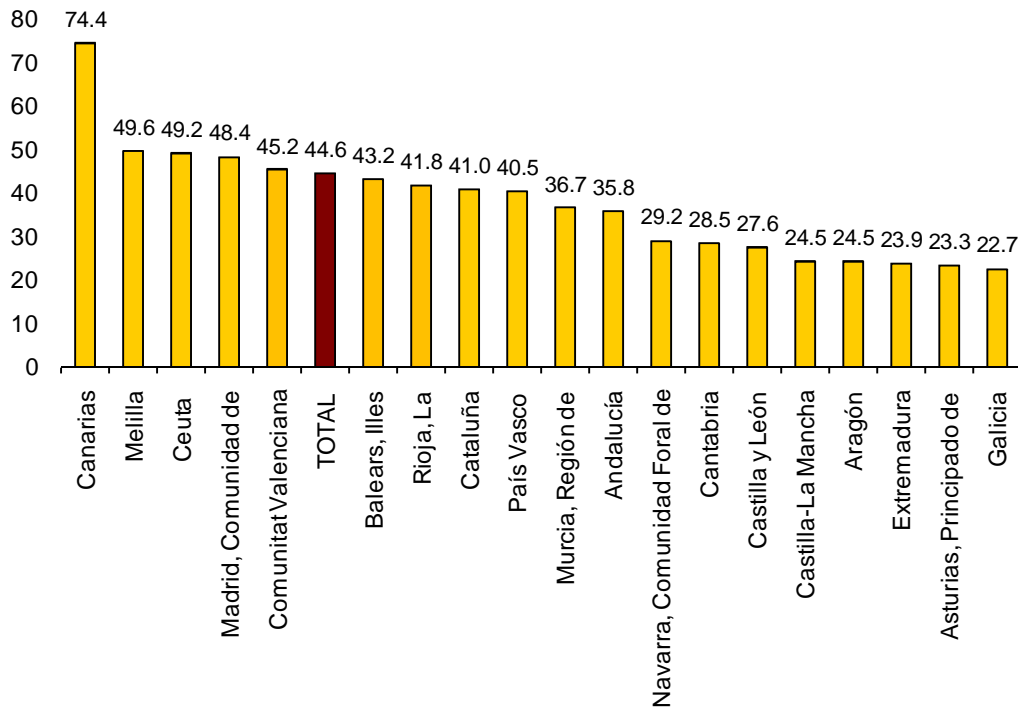
In November, 44.6% of the available bedplaces were occupied, indicating an annual increase of 0.5%. The weekend occupancy rate by bedplaces decreased by 1.6%, standing at 49.8%.

**Occupancy rate and weekend occupancy rate by bedplaces**



Canarias registered the greatest occupancy rate by bedplaces in November (74.4%), followed by Comunidad de Madrid (48.4%) and Comunitat Valenciana (45.2%).

**Occupancy rate by bedplaces by Autonomous Community**



By tourist areas, the South of Gran Canaria registered in November the highest occupancy rate by bedplaces (78.5%) and the South of Tenerife the highest occupancy by weekend occupancy (78.3%). The island of Tenerife recorded the highest number of overnight stays, with more than 1.9 million.

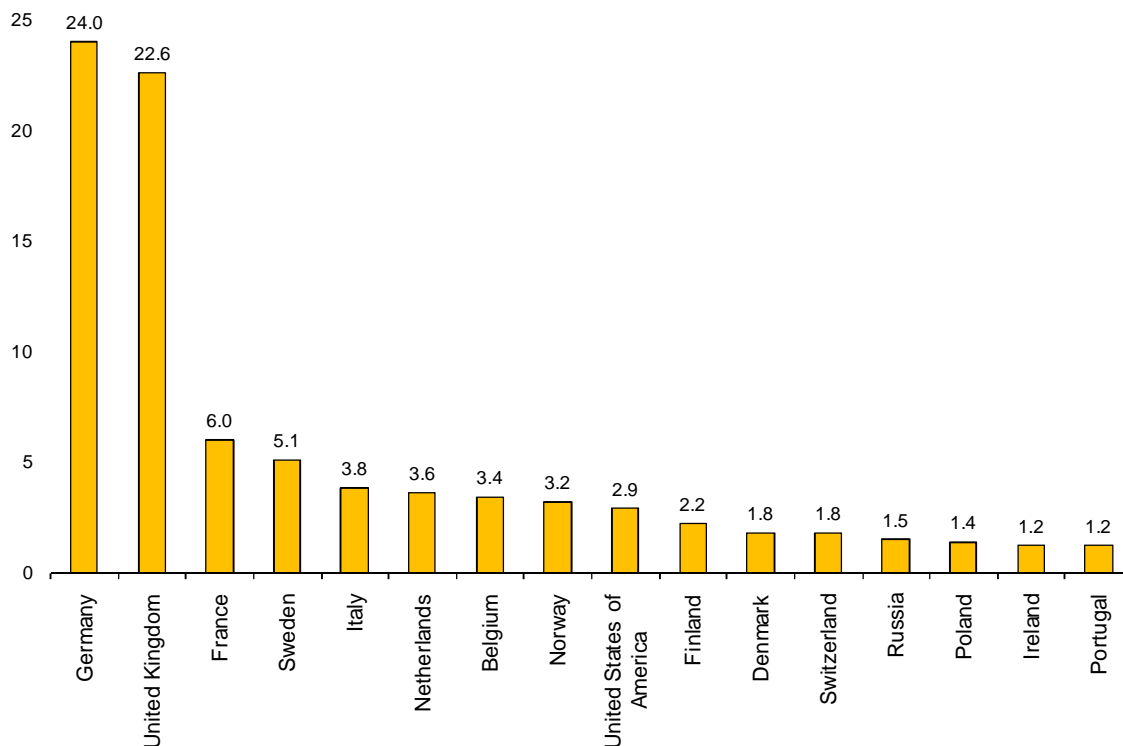
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Arona reached the highest occupancy rate both by bedplaces (81.5%) and by weekend occupancy rate (80.5%).

## Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom concentrated 24.0% and 22.6%, respectively, of the total of overnight stays in hotel establishments by non-residents in November. The German market increased by 2.3% and the British one did so by 4.5%.

Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of 12.6%, -6.0% and 1.6%, respectively.

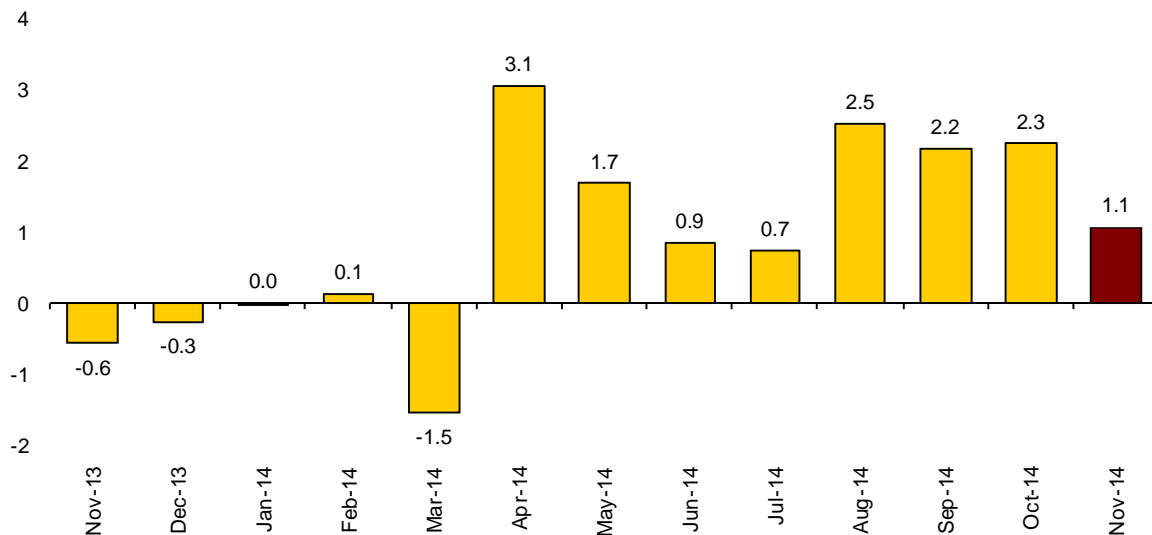
**Distribution of overnight stays of residents abroad from the main 16 countries in %**



## Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 1.1% in November, that is, 1.2 points higher than that of the previous month and the 1.7 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 November (they represented 76.5% of the total). Hotel prices increased 2.7% in the annual rate in Andalucía, but decreased by 0.7% in Cataluña and by 0.1% in Comunidad de Madrid. They remained the same in Andalucía.

By hotel category, the increases in hotel prices were registered in five-golden-star establishments (3.0%), three-golden-star hotels (1.5%), and four-golden-star establishments (0.7%).

In turn, the prices registered a decrease in one-silver-star establishments (2.7%), two-golden-star hotels (1.1%) and three and two-silver-star hotels (0.1%).

In one-golden-star establishments prices did not vary when compared to those of November 2013.

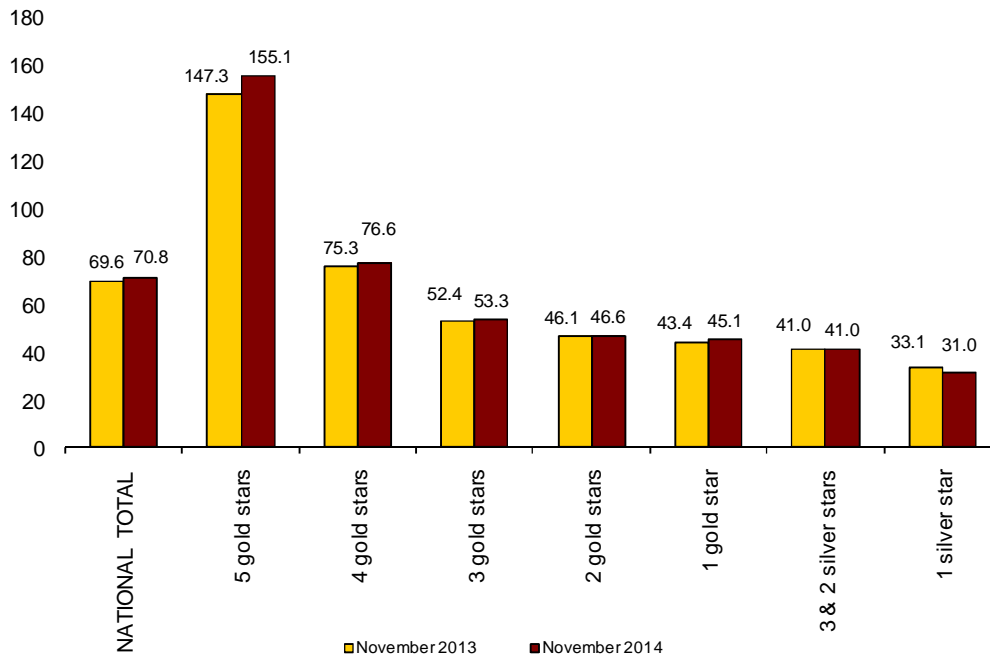
## Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in November was 70.8 euros, which represented an increase of 1.8% as compared to the same month of 2013.

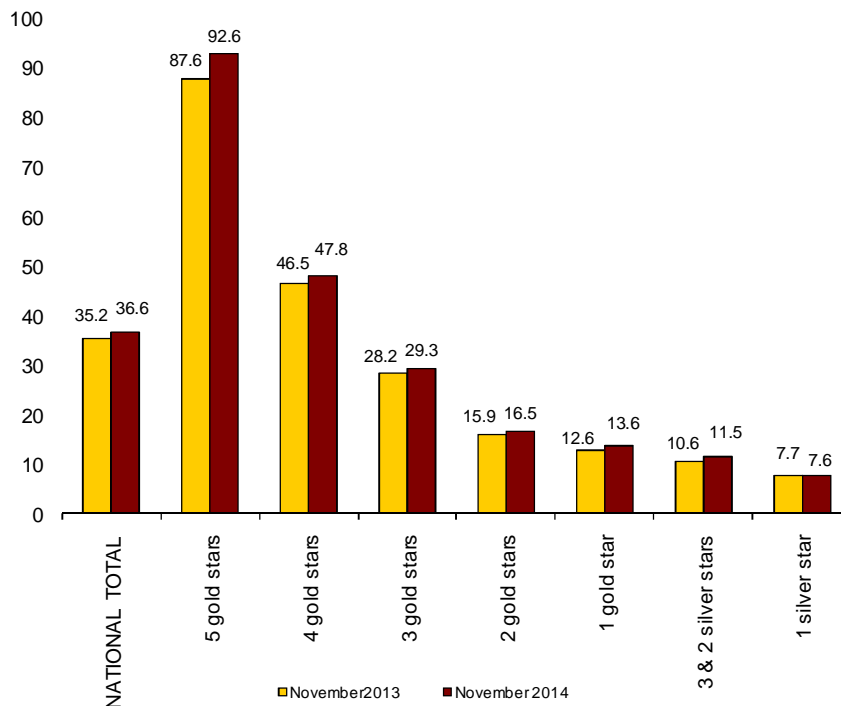
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 36.6 euros, with an increase of 4.1%.

By category, the average invoicing was 155.1 euros for five-star hotels, 76.6 euros for four-star hotels and 53.3 euros for three-star hotels. Income per available room for the same categories was 92.6, 47.8, and 29.3 euros, respectively.

**Average daily rate (ADR) by hotel category in euros**



**Revenue per available room (RevPAR) by hotel category in euros**



## Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

November 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	
<b>TOTAL</b>	<b>5,120,445</b>	<b>2,948,663</b>	<b>2,171,782</b>	<b>15,067,703</b>	<b>6,029,249</b>	<b>9,038,454</b>	<b>2.94</b>
HOTELS: Golden stars							
Five	323,002	114,221	208,780	1,075,613	219,296	856,317	3.33
Four	2,531,243	1,351,874	1,179,369	7,923,210	2,674,386	5,248,824	3.13
Three	1,291,951	797,406	494,545	3,934,861	1,776,979	2,157,883	3.05
Two	368,098	265,655	102,443	797,775	495,591	302,184	2.17
One	151,563	108,531	43,032	318,254	203,106	115,149	2.10
INNS: Silver stars							
Two and three	266,694	197,447	69,247	535,031	370,568	164,463	2.01
One	187,895	113,529	74,367	482,960	289,324	193,635	2.57
Annual rate	0.16	-0.45	1.01	-0.13	-2.83	1.76	-0.29
Cumulative annual rate	4.35	4.34	4.36	2.93	3.35	2.71	-1.36

### 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	
<b>TOTAL</b>	<b>13,135</b>	<b>1,119,226</b>	<b>44.61</b>	<b>49.81</b>	<b>51.74</b>	<b>142,723</b>
HOTELS: Golden stars						
Five	221	69,780	50.92	53.26	59.94	20,675
Four	1,757	492,597	53.27	57.98	62.65	70,649
Three	2,011	273,329	47.72	53.94	55.10	30,377
Two	1,657	89,518	29.57	36.79	35.11	7,155
One	1,026	41,095	25.70	31.28	30.45	3,336
INNS: Silver stars						
Two and three	2,808	78,993	22.51	28.05	27.83	5,662
One	3,654	73,913	21.74	26.11	26.37	4,868
Annual rate	-1.53	-0.46	0.48	-1.64	2.18	0.03

### 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 Gran Canaria	12,745	146,606	66,828	1,230,333	78.47	77.13	87.81	8.14	10,042
Sur de Tenerife	19,824	181,500	115,492	1,441,788	77.73	78.25	88.76	7.74	12,545
Isla de Gran Canaria	32,579	166,983	115,011	1,318,183	77.08	76.41	87.57	7.18	11,044
Isla de Tenerife	48,917	222,521	243,733	1,723,841	76.26	76.84	86.16	7.25	15,736
Isla de Lanzarote	17,759	87,181	86,399	696,979	76.02	73.01	89.12	7.46	5,646
Isla de Fuerteventura	8,306	97,118	30,673	888,870	68.81	69.56	80.91	8.72	7,100
Isla de La Gomera	1,554	6,156	3,563	31,462	68.16	71.31	74.64	4.54	357
Barcelona	133,842	365,883	246,432	981,090	52.85	55.58	64.96	2.46	12,196

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

Costa Blanca	117,547	94,730	436,505	489,251	52.50	55.72	57.11	4.36	6,998
Costa del Sol	91,893	112,733	255,216	511,134	44.75	47.02	52.76	3.75	7,225
Isla de Mallorca	20,329	45,053	48,377	220,493	45.69	41.38	48.96	4.11	3,046
Costa Brava	71,730	41,857	140,064	123,960	34.26	41.84	35.18	2.32	2,344
Palma - Calvià	18,482	35,590	44,904	176,905	44.65	40.26	49.09	4.10	2,423
Costa de la Luz de Cádiz	41,653	18,782	82,354	68,015	24.75	30.36	33.19	2.49	2,006
Catalunya Central	44,880	23,195	81,990	50,860	32.49	35.94	41.61	1.95	1,585
Costa Daurada	43,880	13,313	79,743	36,950	29.02	31.19	28.32	2.04	1,069

#### Tourist site with a greater occupancy rate per month

Arona	4,687	56,589	28,267	452,937	81.45	80.54	89.88	7.85	3,200
Mogán	2,580	37,792	12,539	326,445	80.58	79.15	90.74	8.40	2,031
Yaiza	7,482	42,164	42,934	341,643	78.58	76.72	91.86	7.75	2,836
Puerto de La Cruz	13,936	26,598	89,287	230,113	78.20	78.56	81.90	7.88	2,385
San Bartolomé de Tirajana	10,174	108,823	54,179	903,182	77.89	76.63	86.94	8.05	8,009
Adeje	8,182	92,490	50,360	764,978	77.84	78.30	88.48	8.10	6,833
Tías	2,403	24,568	12,113	202,648	75.03	69.73	87.75	7.96	1,521
Teguise	4,543	19,018	21,602	146,514	74.16	71.87	88.14	7.14	1,163
Pájara	2,866	61,414	13,449	576,926	72.55	71.21	81.65	9.18	4,572
Antigua	2,579	19,686	9,058	156,509	68.54	69.26	81.70	7.44	1,102

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

Madrid	373,310	295,824	640,391	669,020	52.88	63.34	68.22	1.96	11,190
Barcelona	124,603	352,763	230,399	946,753	54.01	57.06	65.66	2.47	11,732
Benidorm	64,248	57,936	330,576	369,928	64.77	67.74	68.27	5.73	4,316
Sevilla	84,717	64,566	148,701	152,640	49.50	60.52	57.25	2.02	2,966
Valencia	69,997	55,873	115,446	144,962	49.54	59.73	63.63	2.07	2,006
Granada	70,241	47,995	127,558	82,376	50.63	72.79	56.41	1.78	1,552
Palma	18,662	32,432	45,221	155,657	50.17	48.11	56.75	3.93	2,115
Torremolinos	14,598	18,978	62,515	120,491	63.82	64.80	69.14	5.45	1,194
Oliva (La)	1,203	13,199	5,531	131,622	60.42	68.85	84.38	9.52	1,199
Málaga	36,193	34,747	58,380	77,589	47.17	56.73	61.95	1.92	1,164

\* 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	%
<b>TOTAL</b>	<b>5,120,445</b>	<b>100.00</b>	<b>15,067,703</b>	<b>100.00</b>
Residents in Spain	2,948,663	57.59	6,029,249	40.01
Residents abroad	2,171,782	42.41	9,038,454	59.99
Total Residents abroad	2,171,782	100.00	9,038,454	100.00
Total Residents in E.U. (without Spain)	1,510,215	69.54	7,188,275	79.53
- Germany	326,319	15.03	2,170,368	24.01
- Austria	22,314	1.03	100,608	1.11
- Belgium	60,912	2.80	305,323	3.38
- Denmark	30,140	1.39	163,214	1.81
- Finland	33,425	1.54	196,186	2.17
- France	203,716	9.38	540,116	5.98
- Greece	9,564	0.44	22,170	0.25
- Ireland	26,286	1.21	112,344	1.24
- Italy	120,485	5.55	340,610	3.77
- Luxembourg	2,872	0.13	16,837	0.19
- Netherlands	75,665	3.48	321,417	3.56
- Poland	29,972	1.38	122,214	1.35
- Portugal	51,945	2.39	106,448	1.18
- United Kingdom	385,812	17.76	2,043,758	22.61
- Czech Republic	7,868	0.36	29,211	0.32
- Sweden	78,788	3.63	461,949	5.11
- Other EU countries*	44,131	2.03	135,502	1.50
Norway	41,670	1.92	287,638	3.18
Russia	34,878	1.61	136,654	1.51
Switzerland	36,403	1.68	161,138	1.78
Rest of Europe	55,526	2.56	162,292	1.80
Japan	42,578	1.96	76,837	0.85
United States of America	108,235	4.98	263,972	2.92
Rest of America	126,936	5.84	313,194	3.47
Africa	37,262	1.72	85,036	0.94
Other countries	178,079	8.20	363,417	4.02

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

## Hotel Price Index (HPI). 2008 Base

November 2014

Provisional data

### National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
<b>TOTAL</b>	<b>91.3</b>	<b>1.1</b>
Andalucía	89.9	0.0
Aragón	77.4	1.7
Asturias, Principado de	80.4	-4.7
Balears, Illes	96.7	6.7
Canarias	106.9	2.7
Cantabria	83.0	-1.6
Castilla y León	85.5	-1.1
Castilla - La Mancha	84.5	-2.9
Cataluña	84.5	-0.7
Comunitat Valenciana	91.0	3.3
Extremadura	87.8	0.1
Galicia	87.5	-1.1
Madrid, Comunidad de	76.7	-0.1
Murcia, Región de	76.5	3.1
Navarra, Comunidad Foral de	78.8	-5.1
País Vasco	89.8	-1.7
Rioja, La	86.7	-1.7
Ceuta	96.9	2.1
Melilla	96.6	3.4

### National General Index and breakdown by categories

	Index	Annual growth rate
<b>TOTAL</b>	<b>91.3</b>	<b>1.1</b>
<b>HOTELS: Gold stars</b>		
Five	90.5	3.0
Fourth	92.0	0.7
Three	89.8	1.5
Two	89.0	-1.1
One	90.1	0.0
<b>HOSTALS: Silver stars</b>		
Three and two	89.4	-0.1
One	93.1	-2.7

## Indicators on the Profitability of the Hotel Sector

November 2014

Provisional data

### National ADR and RevPAR<sup>(\*)</sup> and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
<b>TOTAL</b>	<b>70.8</b>	<b>1.8</b>	<b>36.6</b>	<b>4.1</b>
Andalucía	58.9	1.0	25.3	5.2
Aragón	49.5	0.3	14.6	3.0
Asturias, Principado de	47.5	-7.1	13.6	-7.5
Balears, Illes	66.1	12.8	33.0	18.8
Canarias	85.6	3.7	72.9	1.2
Cantabria	54.6	-0.6	15.9	5.1
Castilla y León	51.4	0.2	16.0	4.4
Castilla - La Mancha	51.5	-2.7	15.0	-0.3
Cataluña	81.8	1.5	40.3	2.6
Comunitat Valenciana	52.8	3.5	26.6	9.8
Extremadura	51.5	0.0	14.7	-0.7
Galicia	49.2	2.9	13.4	2.5
Madrid, Comunidad de	74.0	-0.6	46.3	8.7
Murcia, Región de	49.4	3.7	21.7	15.0
Navarra, Comunidad Foral de	58.2	-1.1	21.8	-0.3
País Vasco	68.1	-0.2	33.2	0.1
Rioja, La	60.2	0.3	28.7	6.2
Ceuta	70.9	6.7	40.1	26.9
Melilla	64.6	2.7	44.4	15.4

### National ADR and RevPAR<sup>(\*)</sup> and breakdown by categories

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
<b>TOTAL</b>	<b>70.8</b>	<b>1.8</b>	<b>36.6</b>	<b>4.1</b>
<b>HOTELS: Gold stars</b>				
Five	155.1	5.3	92.6	5.7
Four	76.6	1.8	47.8	2.9
Three	53.3	1.8	29.3	4.0
Two	46.6	1.0	16.5	3.8
One	45.1	3.8	13.6	8.7
<b>GUESTHOUSES: Silver stars</b>				
Three and two	41.0	0.1	11.5	8.4
One	31.0	-6.2	7.6	-1.8

(\*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room