

1 March 2013

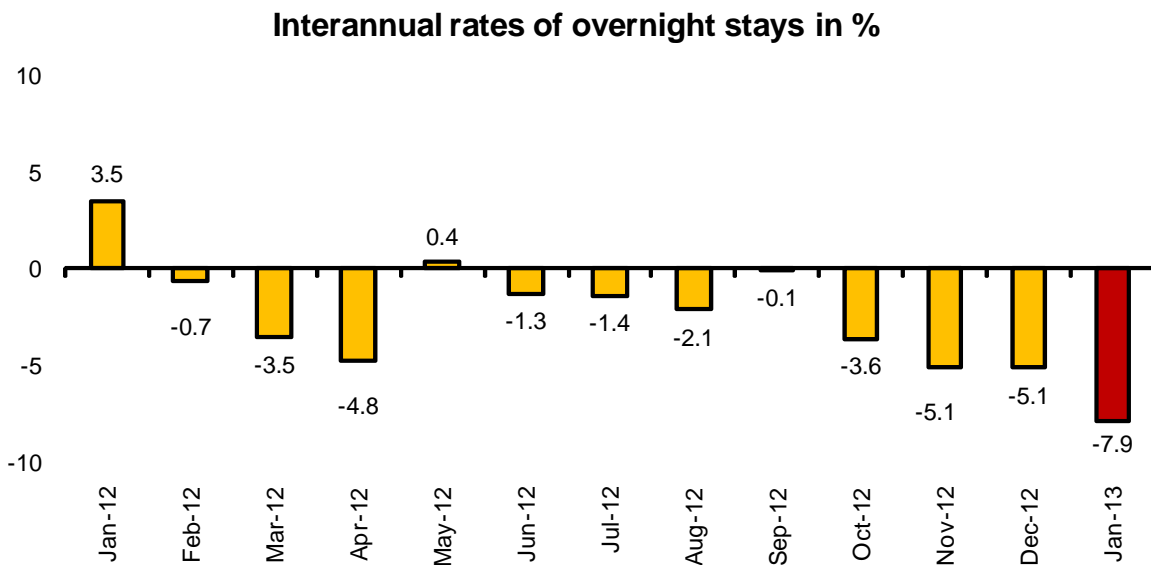
**Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
January 2013. Provisional data**

**Overnight stays in hotel establishments decrease 5.2% in January,
as compared with the same month in 2012**

**Hotels earn 27.5 euros per available room and invoice an average of
67.7 euros per occupied room**

During the month of January, 11.9 million overnight stays were recorded in hotel establishments, indicating a 5.2% decrease as compared with the same month in 2012. Overnight stays for residents decreased -12.4% , as well as for non-residents, -0.4% .

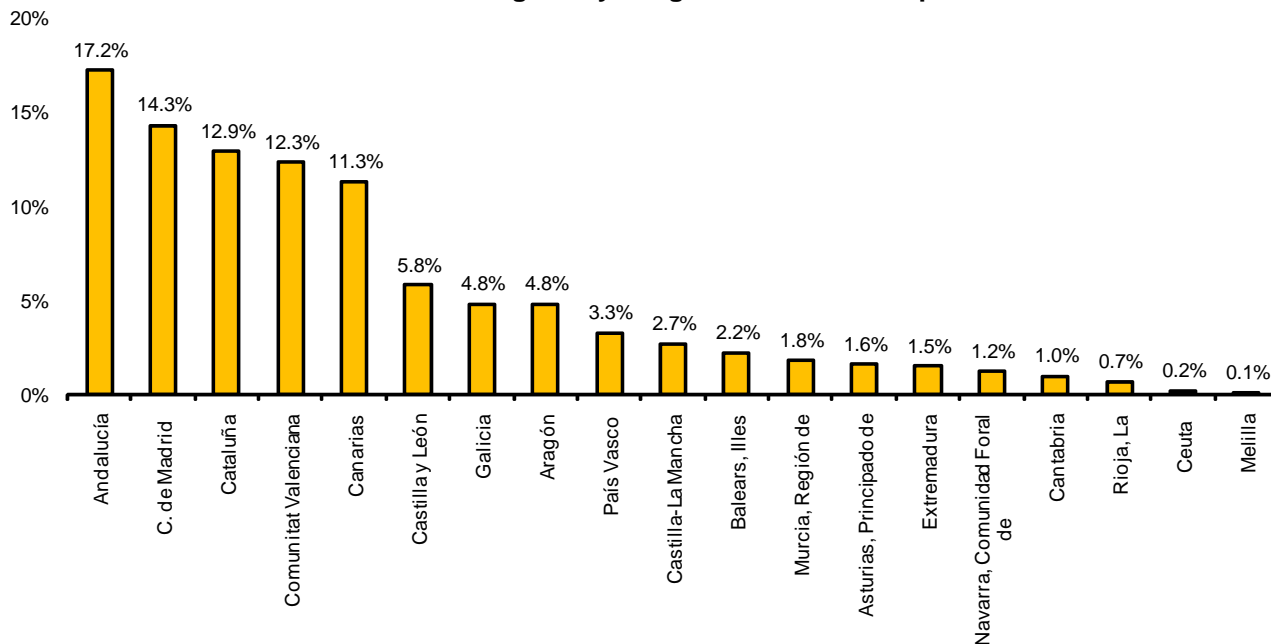
The average stay increased 2.9%, as compared with January 2012, standing at 3.2 nights per guest.



Main destinations

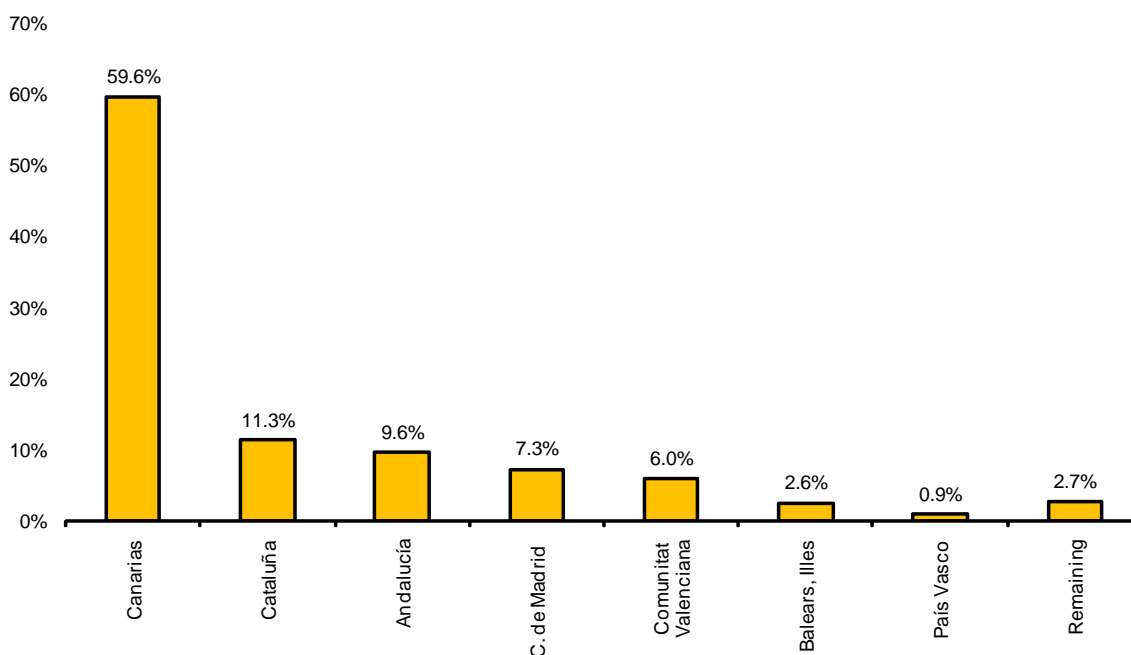
Andalucía, Comunidad de Madrid and Cataluña were the main destinations of guests resident in Spain, with interannual rates for overnight stays of -15.8% , -13.2% and -13.6% , respectively.

Distribution of overnight stays of guests resident in Spain in %



The main destination chosen by non-residents was Canarias. In this Autonomous Community, overnight stays by foreign nationals increased 0.7%, as compared with the same month of 2012. Followed by Cataluña, with an annual rate of 1.2%, and Andalucía, with a decrease of 3.1%.

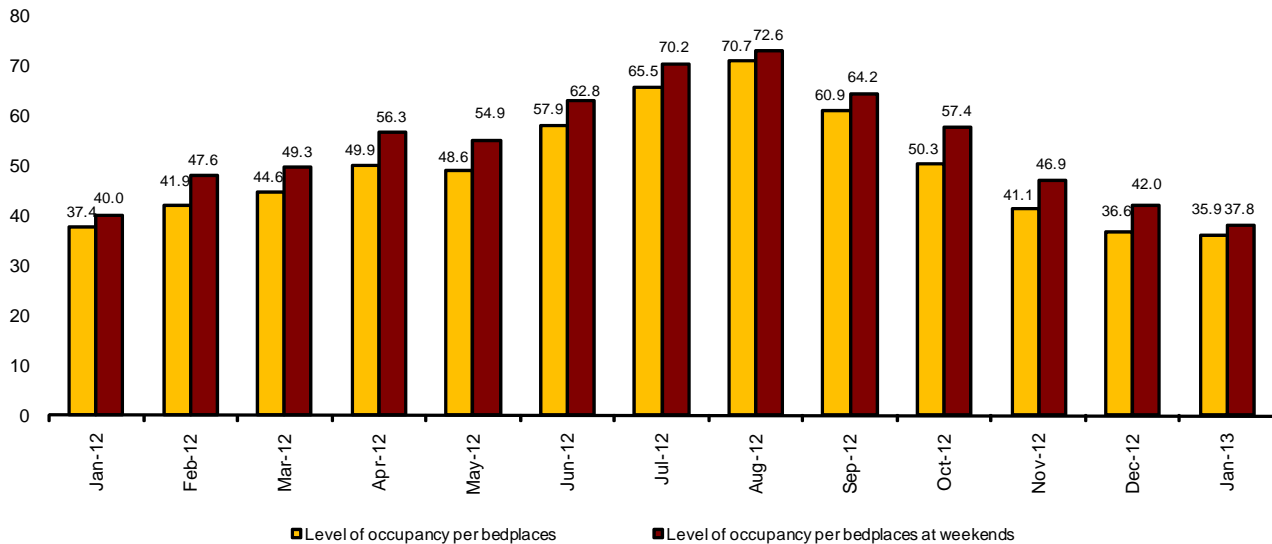
Distribution of overnight stays of guests resident abroad in %



Hotel Occupancy

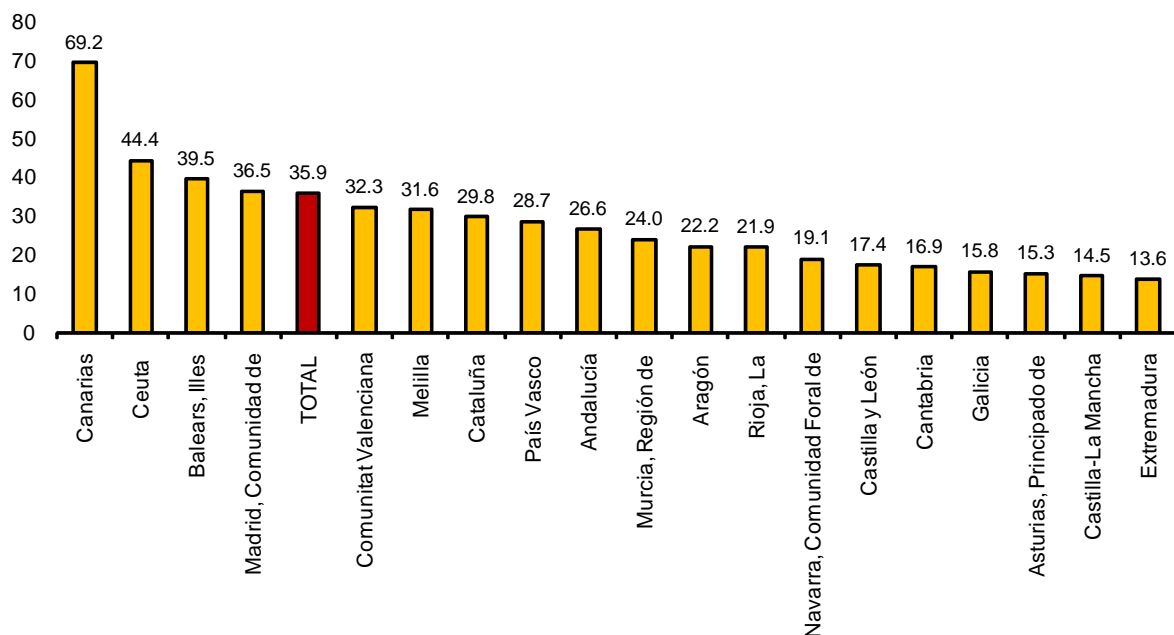
In terms of occupancy, 35.9% of the available bedplaces were filled in January, with an annual decrease of 3.7%. The weekend occupancy rate by bedplaces decreased 5.5% and stood at 37.8%.

Level of occupancy per bedplaces and per bedplaces at weekends



During the month of January, Canarias was the Autonomous Community with the highest occupancy rate by bedplaces (69.2%), followed by Illes Balears (39.5%) and Comunidad de Madrid (36.5%).

Level of occupancy per bedplaces by Automous Communities



The South of Tenerife presented the highest occupancy rate by bedplaces (78.6%), and the South of Gran Canaria, the highest weekend occupancy rate by bedplaces (77.1%). In the island of Tenerife more than 2.0 million of overnight stays were registered in January.

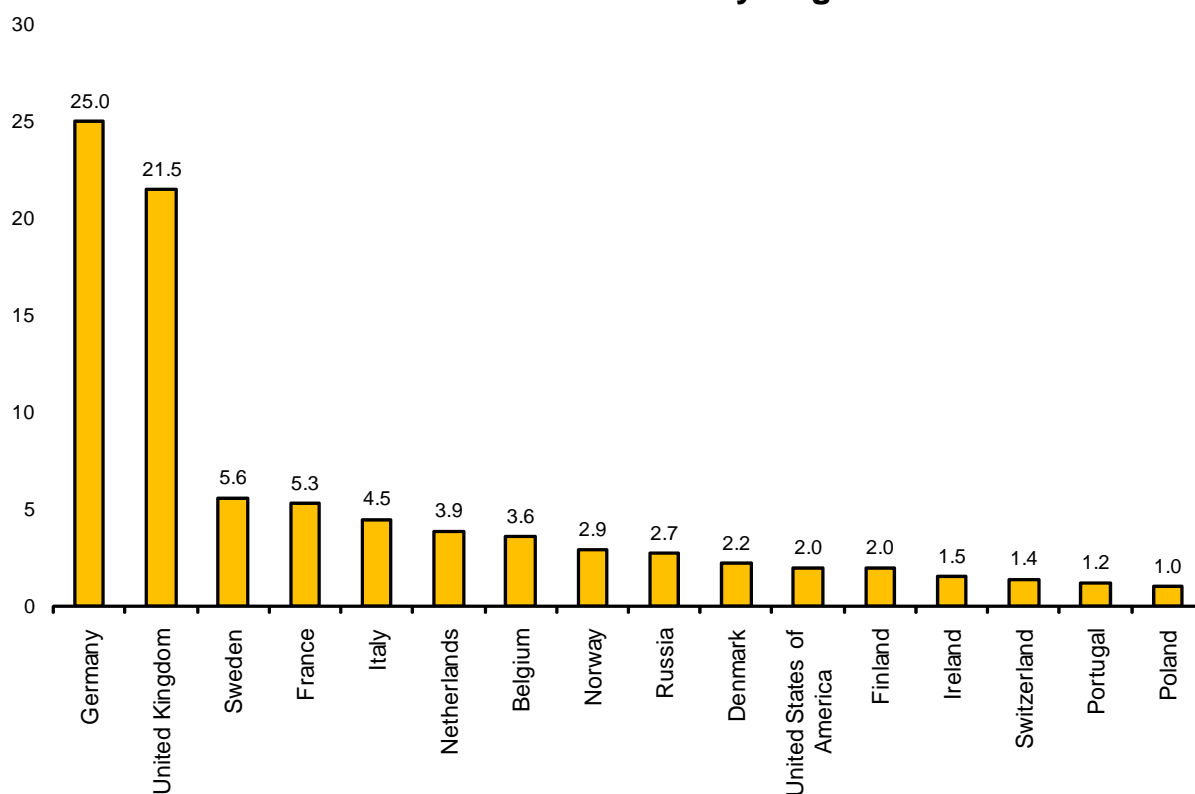
The tourist sites with the highest number of overnight stays were Madrid, San Bartolomé de Tirajana y Adeje. Arona reached both the highest occupancy rate by bedplaces (84.6%) and Mogán the highest weekend occupancy (82.0%).

Overnight stays of guests resident abroad

Guests from Germany and the United Kingdom registered 25.0% and 21.5%, respectively, of the total of overnight stays by foreigners in January. The German market experienced an 8.2% annual decrease, whilst the British market increased 6.1%.

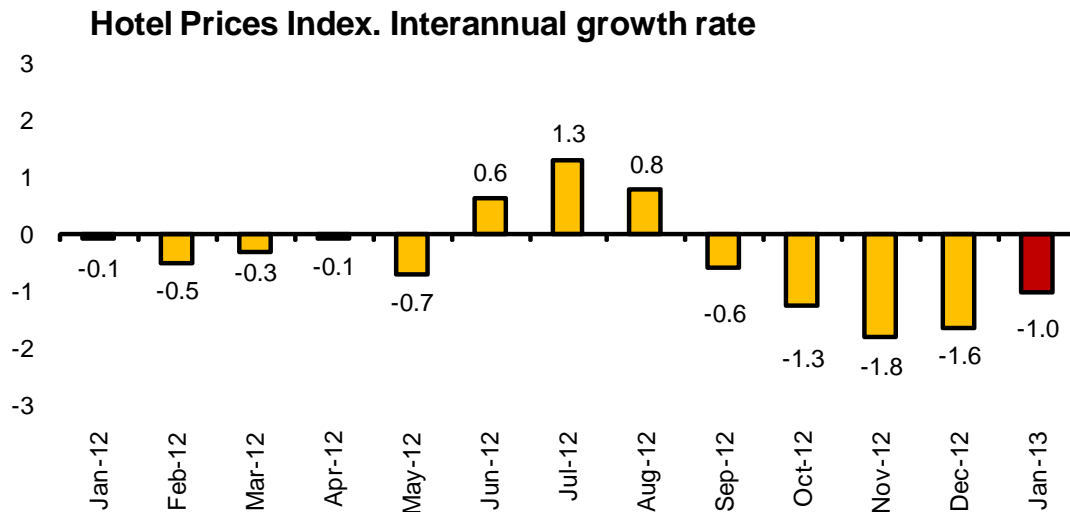
Overnight stays of guests from Sweden, France and Italy (the following countries of origin) registered annual rates of 10.4%, 10.2% and -28.7%, respectively.

Distribution of overnight stays of residents abroad of the main 16 countries by origin in 2012



Hotel Price Index

The interannual rate of the Hotel Price Index (HPI) stood at -1.0% in January, this rate being 0.6 points higher as compared with last month (-1.6%), and 0.9 points lower than that registered last year (-0.1%).



Canarias, Comunidad de Madrid, Cataluña and Andalucía, that carried 78.5% of the total weight of the HPI in the month of January, showed uneven performance in their prices.

Canarias, which carried the greatest load in the weighting structure this month, presented an interannual rate of 1.6%, the same as that estimated in December. Hotel prices experienced a decrease of 3.8% in Comunidad de Madrid, 0.9% lower as compared with that registered the previous month. Cataluña showed a rate of -2.4% , as compared with the -1.3% registered in the last month. Andalucía presented an annual variation of -1.9% , 1.5 points more than in December.

Hotel prices decreased in three and two-silver-star hotels (-5.3%), in two-gold-star hotels (-2.7%), in three-gold-star hotels (-2.4%) and in one-gold star and one-silver-star (-1.2% in both cases) and in four-gold-star hotels (-1.0%).

Conversely, in January prices increased in five-gold-star establishments (2.1%) .

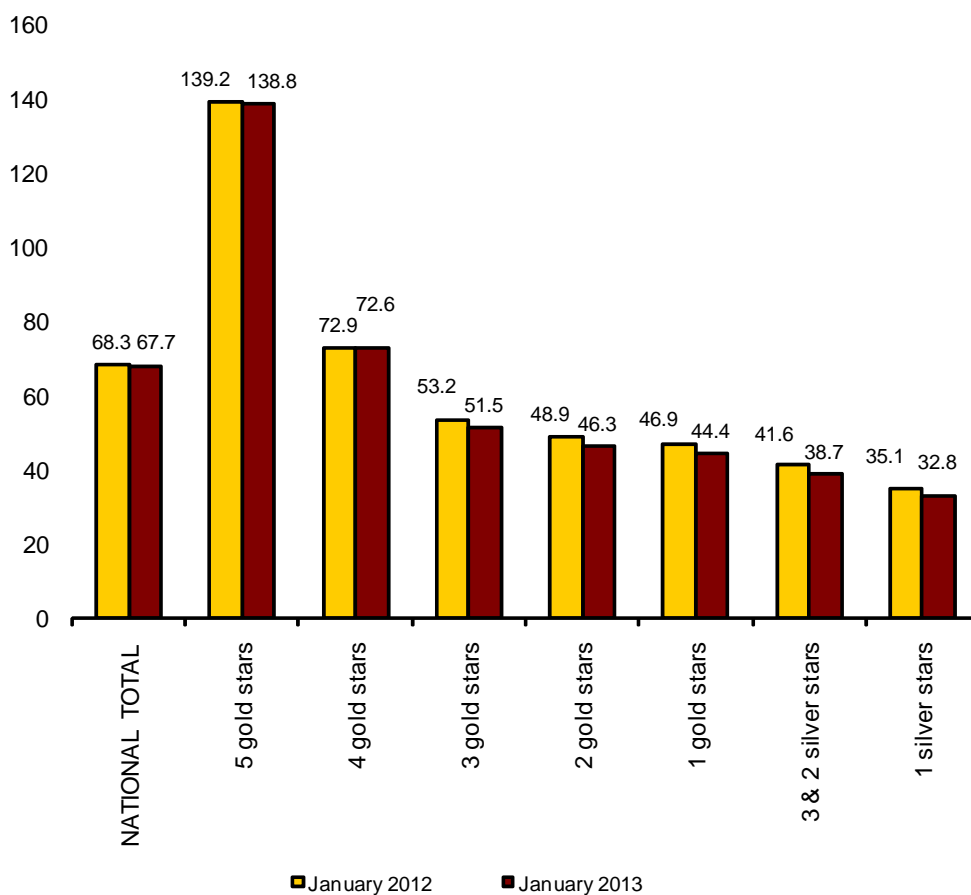
Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in January was 67.7 euros, a 0.1% increase compared with the same month in 2012.

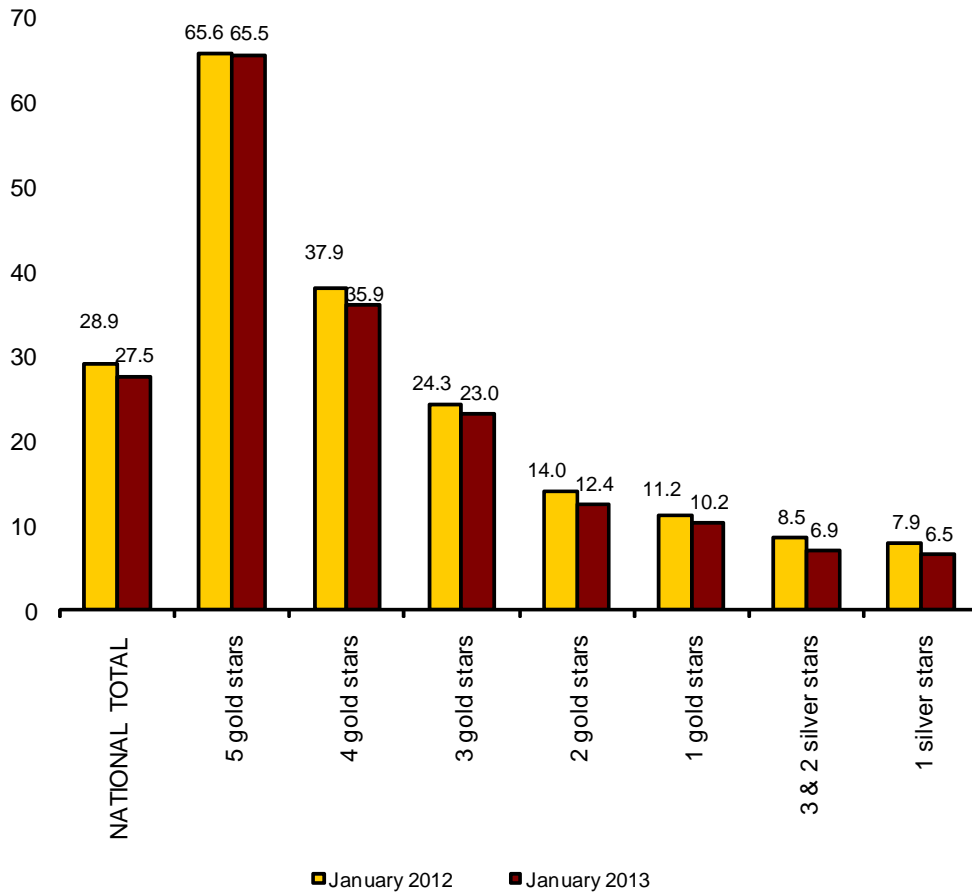
In turn, income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 27.5 euros, with a decrease of 4.1% as compared with January 2012.

By category, the average invoicing was 138.8 euros for five-star hotels, 72.6 euros for four-star hotels and 51.5 euros for three-star hotels. Income per available room for these same categories was 65.5, 35.9 and 23.0 euros, respectively.

Average daily rate (ADR)



Revenue per available room (RevPAR)



For further information see [INEbase-www.ine.es/en/](http://www.ine.es/en/)

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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

January 2012

Provisional data

1. Travellers, overnight stays and average stay by categories of establishment

Category	Number of travellers			Number of overnight stays			Average stay
	Total	Residents in Spain	Residents abroad	Total	Residents in Spain	Residents abroad	
TOTAL	3,718,199	2,111,103	1,607,096	11,943,145	4,446,448	7,496,697	3.21
HOTELS: Golden stars							
Five	255,497	94,732	160,766	925,799	199,197	726,602	3.62
Four	1,792,021	946,134	845,886	6,196,482	1,909,320	4,287,162	3.46
Three	961,832	583,364	378,468	3,226,826	1,348,215	1,878,611	3.35
Two	288,360	204,780	83,580	618,550	366,824	251,726	2.15
One	105,654	77,153	28,501	228,346	148,694	79,653	2.16
INNS: Silver stars							
Two and three	166,147	121,055	45,092	353,158	246,765	106,393	2.13
One	148,687	83,885	64,802	393,983	227,434	166,549	2.65
Interannual rate	-7.85	-11.69	-2.26	-5.21	-12.40	-0.37	2.86
Cumulative interannual rate	-7.85	-11.69	-2.26	-5.21	-12.40	-0.37	2.86

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

Category	Estimated open establishments	Estimated bedplaces	Level of occupancy			Employed personnel
			Per bedplaces	Per bedplaces at weekend	Per rooms	
TOTAL	12,491	1,065,638	35.94	37.82	40.77	133,474
HOTELS: Golden stars						
Five	222	72,003	41.16	41.79	47.53	19,879
Four	1,642	461,082	43.06	44.63	49.59	64,703
Three	1,869	257,488	40.18	42.47	44.92	28,696
Two	1,538	87,113	22.88	26.27	27.07	6,812
One	968	38,779	18.96	20.67	22.96	2,967
INNS: Silver stars						
Two and three	2,696	76,408	14.88	16.94	18.14	5,632
One	3,555	72,766	17.45	19.20	21.63	4,785
Interannual rate	-1.15	-1.58	-3.68	-5.46	-4.28	-4.95

3. Travellers, overnight stays, occupancy, average stay and employed personnel

Results by areas and tourist sites

	Travellers		Overnight stays		Level of occupancy			Average stay	Employed personnel
	Residents in Spain	Residents abroad	Residents in Spain	Residents abroad	Per bedplac	Per bedplaces at weekend	Per rooms		

Tourist areas with a greater level of occupancy per month

Sur de Tenerife	22,187	167,963	133,948	1,485,579	78.61	76.39	87.39	8.52	12,015
Isla de Tenerife	53,065	202,394	268,496	1,795,740	76.54	75.50	85.25	8.08	15,303
Sur de Gran Canaria	10,910	129,111	66,103	1,196,500	76.10	77.11	86.46	9.02	9,419
Isla de Gran Canaria	27,589	146,953	109,265	1,280,208	74.62	75.61	84.89	7.96	10,367
Isla de La Gomera	1,639	5,444	3,163	32,273	67.76	71.35	74.07	5.00	388
Isla de Lanzarote	13,158	61,905	75,319	566,513	60.84	59.01	69.39	8.55	4,941
Isla de Fuerteventura	6,388	76,877	39,296	747,654	57.50	57.37	67.17	9.45	6,502
Isla de Mallorca	21,472	30,375	84,874	192,062	40.61	41.47	46.55	5.34	2,552

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

Barcelona	107,592	259,368	198,412	676,257	38.73	41.52	45.32	2.38	11,616
Costa Blanca	91,446	56,754	350,745	332,026	40.57	41.86	42.92	4.61	5,783
Costa del Sol	68,122	83,430	177,318	370,722	35.61	36.23	40.35	3.62	5,924
Palma - Calvià	20,126	25,279	82,758	136,402	40.03	39.99	43.78	4.83	2,110
Pirineo Aragonés	36,976	2,214	110,941	5,630	33.88	40.64	32.81	2.97	1,050
Costa de Almería	23,535	6,037	73,747	34,516	22.21	19.47	29.99	3.66	1,050
Costa Brava	27,172	21,067	50,481	44,568	18.64	21.78	21.03	1.97	1,539
Catalunya Central	37,426	12,330	67,892	26,696	24.25	22.77	30.69	1.90	1,544

Tourist sites with a greater level of occupancy per month

Arona	4,416	52,011	32,281	464,247	84.63	80.12	90.59	8.80	3,176
Mogán	1,346	37,161	6,456	319,552	80.22	81.97	91.60	8.47	1,894
Adeje	8,744	86,901	61,806	788,797	77.66	77.21	87.86	8.89	6,643
Puerto De La Cruz	16,396	23,798	100,830	265,001	77.41	78.49	84.65	9.10	2,505
San Bartolomé De Tirajana	9,412	92,412	59,676	879,663	74.99	75.84	84.99	9.23	7,527
Palmas De Gran Canaria (Las)	13,550	15,328	38,143	77,235	65.59	66.78	76.95	4.00	800
Yaiza	7,057	28,165	46,936	263,655	60.99	58.26	65.49	8.82	2,463
Tías	2,034	17,270	12,124	164,376	59.49	54.98	67.15	9.14	1,358
Sallent De Gállego	10,234	1,052	34,238	2,900	58.46	70.54	57.54	3.29	230
Pájara	2,770	49,133	23,861	506,189	58.20	58.01	65.64	10.21	4,679

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

Madrid	285,990	216,268	498,362	491,256	39.65	41.51	47.64	1.97	11,811
Barcelona	102,367	250,851	182,958	653,829	39.14	42.23	44.82	2.37	11,250
Benidorm	46,041	30,985	258,466	261,268	52.49	55.33	53.98	6.75	3,697
Sevilla	50,706	54,465	85,737	112,204	33.20	36.28	38.90	1.88	2,760
Torremolinos	14,735	15,791	65,525	103,798	48.81	44.72	48.59	5.55	1,094
Palma	18,433	19,743	70,469	89,994	38.41	40.23	44.05	4.20	1,670
Granada	53,578	32,613	96,578	55,250	38.65	52.42	38.32	1.76	1,481
Valencia	46,855	31,532	76,409	71,646	28.66	34.28	34.91	1.89	1,844
Teguse	2,129	13,257	11,617	115,235	57.26	61.15	74.45	8.24	922
Málaga	26,712	25,630	43,841	55,880	34.71	35.77	42.21	1.91	1,131

* Not taken into account those included in the preceding table because they are in the bigger level of occupancy tables too.

4. Travellers, overnight stays and average stay by country of residence

Results by countries

Countries	Number of travellers		Overnight stays	
	Total	%	Total	%
TOTAL	3,718,199	100.00	11,943,145	100.00
Residents in Spain	2,111,103	56.78	4,446,448	37.23
Residents abroad	1,607,096	43.22	7,496,697	62.77
Total Residents abroad	1,607,096	100.00	7,496,697	100.00
Total Residents in U.E. (without Spain)	1,078,880	67.13	6,001,108	80.05
- Germany	231,953	14.43	1,870,457	24.95
- Austria	11,902	0.74	72,020	0.96
- Belgium	41,434	2.58	267,619	3.57
- Denmark	28,327	1.76	162,376	2.17
- Finland	23,063	1.44	149,371	1.99
- France	146,400	9.11	396,102	5.28
- Greece	3,864	0.24	9,435	0.13
- Ireland	20,240	1.26	111,777	1.49
- Italy	93,825	5.84	333,618	4.45
- Luxembourg	2,560	0.16	20,573	0.27
- Netherlands	54,149	3.37	289,494	3.86
- Poland	17,877	1.11	76,257	1.02
- Portugal	44,888	2.79	90,696	1.21
- United Kingdom	258,082	16.06	1,611,215	21.49
- Czech Republic	4,591	0.29	18,565	0.25
- Sweden	64,075	3.99	419,777	5.60
- Rest of UE*	29,528	1.84	94,534	1.26
Norway	31,803	1.98	216,253	2.88
Russia	47,968	2.98	205,019	2.73
Switzerland	23,506	1.46	107,617	1.44
Rest of Europe	40,314	2.51	121,826	1.63
Japan	47,394	2.95	73,767	0.98
United States of America	61,352	3.82	151,209	2.02
Rest of America	113,722	7.08	277,436	3.70
African's countries	42,018	2.61	85,688	1.14
Rest of the world	122,261	7.61	263,996	3.52

*Countries included in the Rest of UE: Bulgaria, Cyprus, Slovakia, Slovenia, Estonia, Hungary, Latvia, Lithuania, Malta and Romania

Hotel Price Index (HPI). 2008 Base

January 2013

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Interannual variation rate
TOTAL	89.3	-1.0
Andalucía	89.5	-1.9
Aragón	75.5	-5.2
Asturias, Principado de	83.3	-5.1
Balears, Illes	99.4	2.0
Canarias	98.7	1.6
Cantabria	91.5	-2.4
Castilla y León	88.0	-4.9
Castilla - La Mancha	88.3	-3.3
Cataluña	81.0	-2.4
Comunitat Valenciana	87.2	-1.5
Extremadura	81.2	-4.9
Galicia	90.5	-3.8
Madrid, Comunidad de	78.7	-3.8
Murcia, Región de	75.6	-5.3
Navarra, Comunidad Foral de	79.9	-6.3
País Vasco	86.9	0.2
Rioja, La	85.6	-5.1
Ceuta	98.8	-6.6
Melilla	87.8	5.7

National General Index and breakdown by categories

	Index	Interannual variation rate
TOTAL	89.3	-1.0
HOTELS: Gold stars		
Five	86.3	2.1
Fourth	89.4	-1.0
Three	88.6	-2.4
Two	89.1	-2.7
One	95.2	-1.2
HOSTALS: Silver stars		
Three and two	88.5	-5.3
One	98.0	-1.2

Indicators on the Profitability of the Hotel Sector

January 2013

Provisional data

National ADR and RevPAR^(*) and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Variation Rate variation	RevPar (in euros)	Variation Rate variation
TOTAL	67.7	0.1	27.5	-4.1
Andalucía	58.6	1.0	18.0	-7.2
Aragón	55.3	1.2	13.9	0.7
Asturias, Principado de	50.2	-4.4	9.5	-8.7
Balears, Illes	57.0	3.2	26.7	28.4
Canarias	75.7	1.2	59.4	-2.7
Cantabria	57.8	-6.3	10.6	-21.1
Castilla y León	48.8	-7.6	10.1	-19.3
Castilla - La Mancha	53.4	-7.3	9.8	-19.4
Cataluña	79.0	2.1	27.6	-1.3
Comunitat Valenciana	48.4	-2.1	17.4	-8.2
Extremadura	50.5	-4.8	9.0	-21.5
Galicia	46.7	-2.1	9.3	6.0
Madrid, Comunidad de	74.9	-4.2	33.0	-14.3
Murcia, Región de	51.4	-5.5	15.8	-5.2
Navarra, Comunidad Foral de	56.2	-3.5	13.4	0.1
País Vasco	63.8	2.8	22.2	-7.2
Rioja, La	55.1	-7.6	15.9	-5.2
Ceuta	68.1	-3.2	33.8	7.7
Melilla	61.0	3.0	26.9	0.2

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

	ADR (in euros)	Variation Rate interannual	RevPar (in euros)	Variation Rate interannual
TOTAL	67.7	0.1	27.5	-4.1
HOTELS: Gold stars				
Five	138.8	3.6	65.5	3.7
Four	72.6	-0.4	35.9	-5.0
Three	51.5	-1.8	23.0	-3.7
Two	46.3	-4.4	12.4	-10.6
One	44.4	-7.0	10.2	-12.1
GUESTHOUSES: Silver stars				
Three and two	38.7	-6.5	6.9	-18.5
One	32.8	-6.8	6.5	-18.9

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