

21 March 2013

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

**Overnight stays in hotel establishments decrease 7.7% in February, as compared with the same month in 2012**

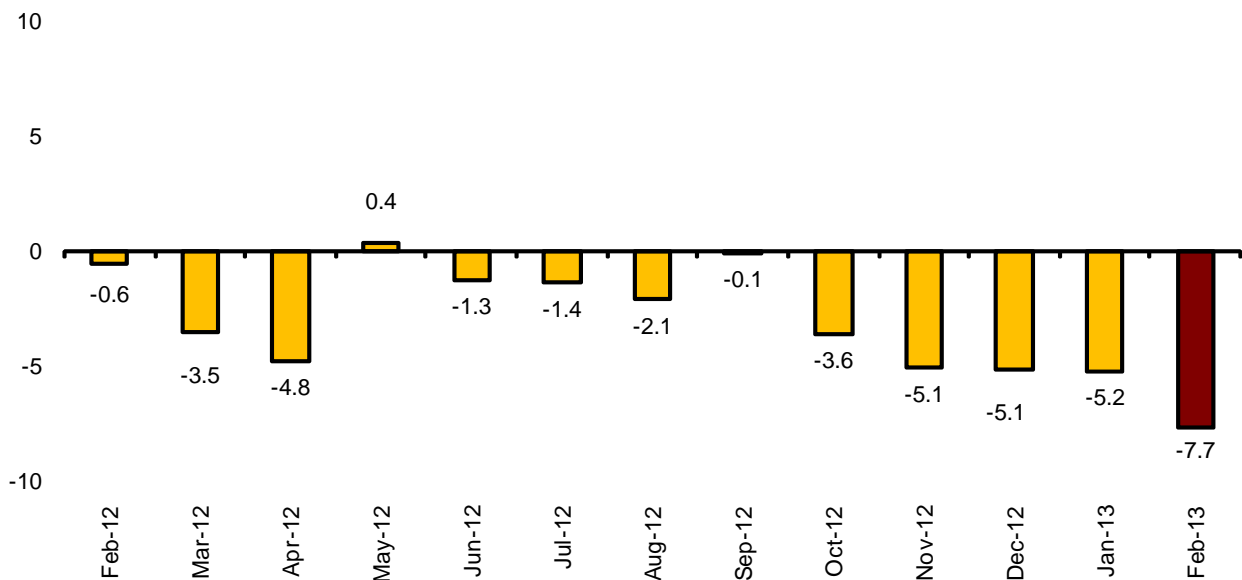
**Hotels earn 32.9 euros per available room and invoice an average of 69.9 euros per occupied room**

During the month of February, 13.0 million overnight stays were recorded in hotel establishments, indicating a 7.7% decrease as compared with the same month in 2012. Overnight stays for residents decreased -15.3%, as well as for non-residents, -1.8%.

The average stay increased 1.1%, as compared with February 2012, standing at 3.0 nights per guest.

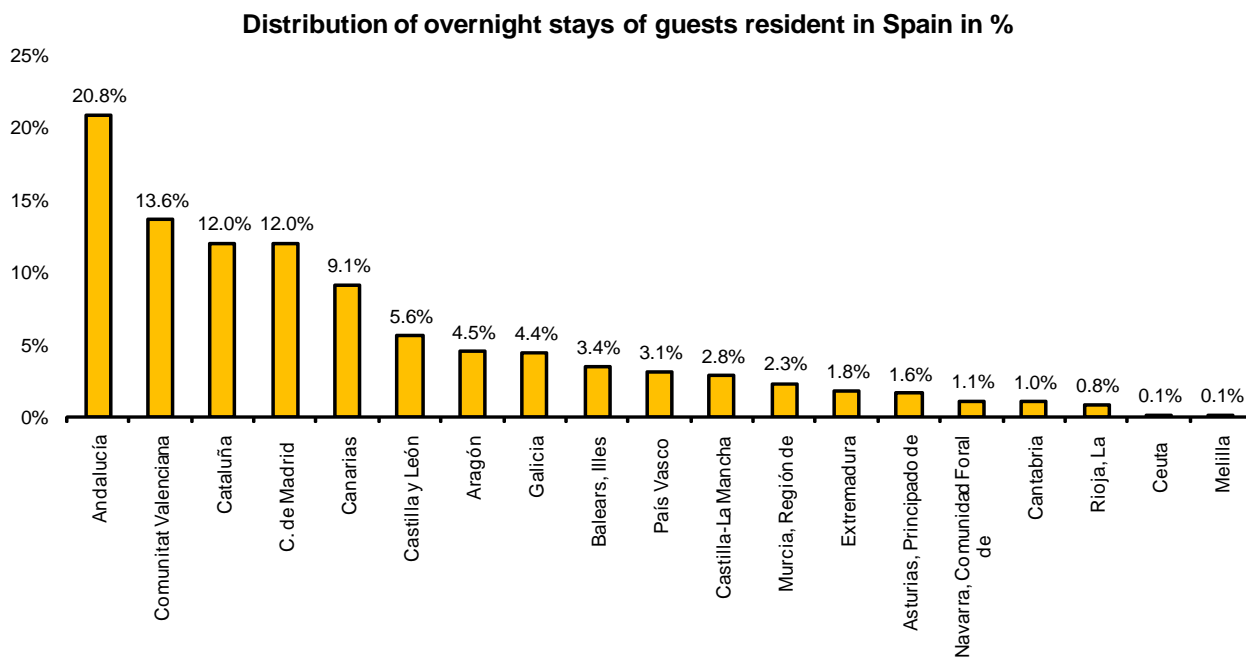
During the first months of the year, overnight stays decreased 6.5% as compared with the same month of the previous year.

**Interannual rates of overnight stays in %**

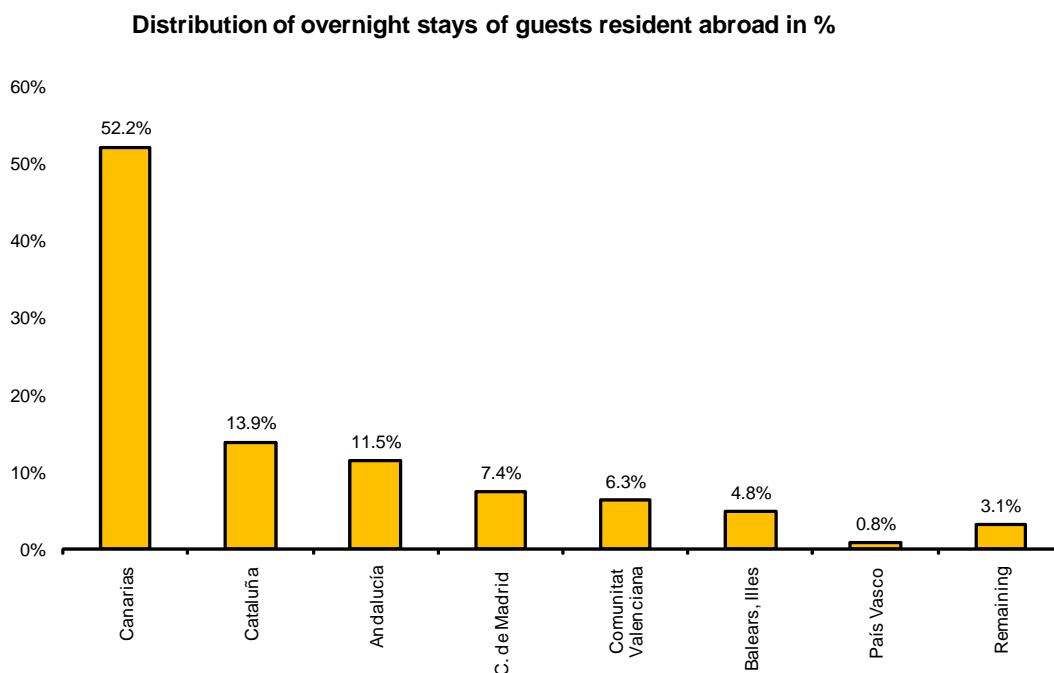


**Main destinations**

Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with interannual rates for overnight stays of -16.4%, -15.0%, -16.7% and -15.6% respectively.



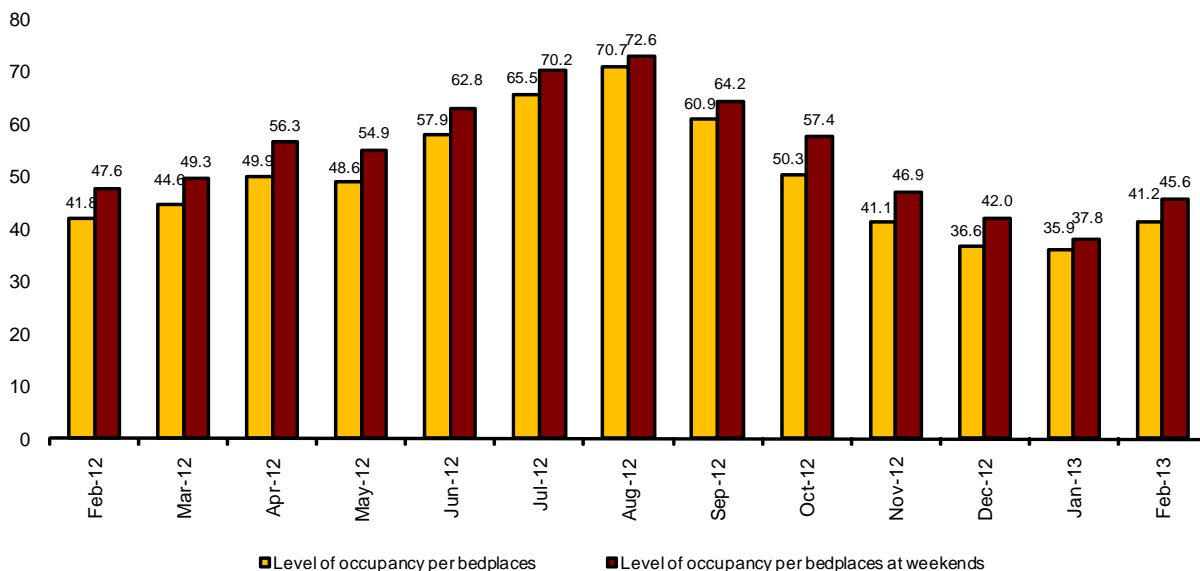
The main destination chosen by non-residents was Canarias. In this Autonomous Community, overnight stays by foreign nationals decreased 2.6%, as compared with the same month of 2012. Followed by Cataluña, with an annual rate of -1.8%, and Andalucía, with an increase of 0.9%.



### Hotel Occupancy

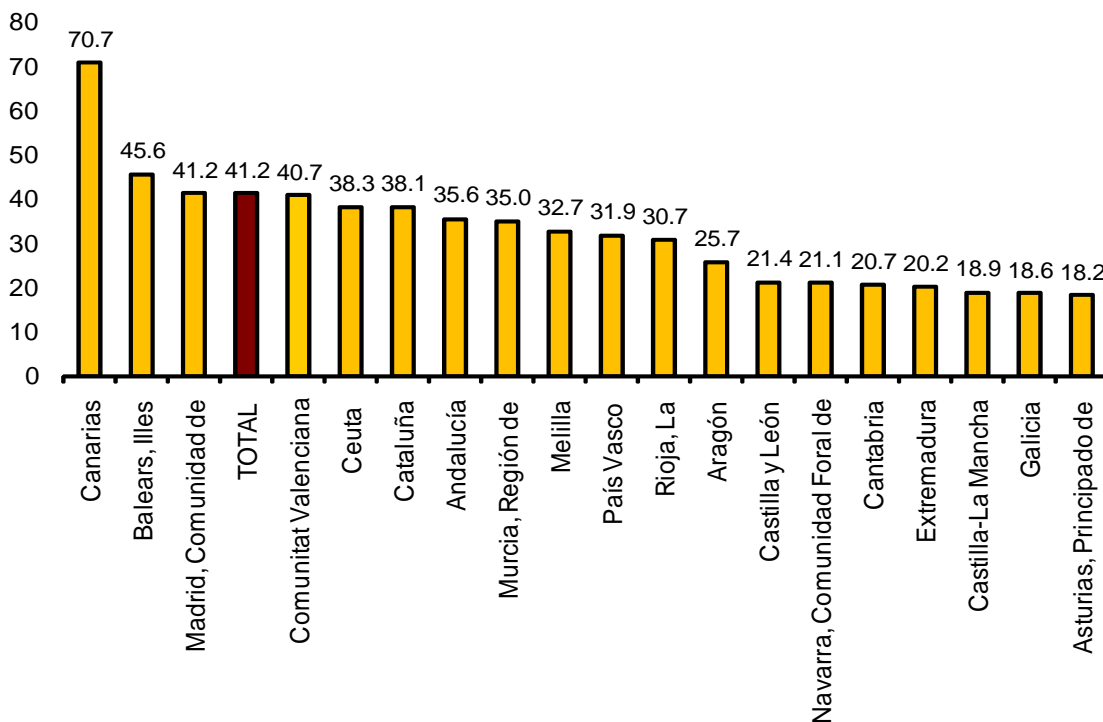
In terms of occupancy, 41.2% of the available bedplaces were filled in February, with an annual decrease of 1.5%. The weekend occupancy rate by bedplaces decreased 4.2% and stood at 45.6%.

**Level of occupancy per bedplaces and per bedplaces at weekends**



During the month of February, Canarias was the Autonomous Community with the highest occupancy rate by bedplaces (70.7%), followed by Illes Balears (45.6%) and Comunidad de Madrid (41.2%).

**Level of occupancy per bedplaces by Automous Communities**



The South of Tenerife presented the highest occupancy rate by bedplaces as well as the highest weekend occupancy rate by bedplaces (78.9% in both cases). In the island of Tenerife more than 1.9 million of overnight stays were registered in February.

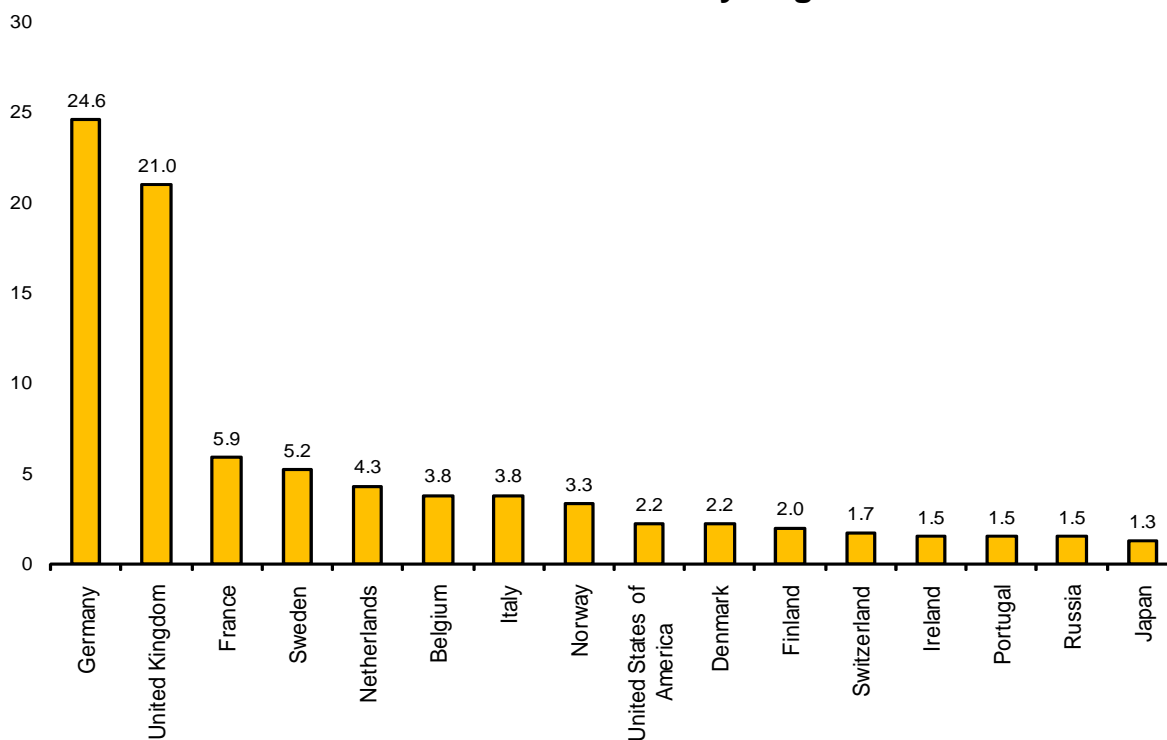
The tourist sites with the highest number of overnight stays were Madrid, Barcelona y San Bartolomé de Tirajana. Arona reached both the highest occupancy rate by bedplaces (85.1%) and the highest weekend occupancy (84.2%).

**Overnight stays of guests resident abroad**

Guests from Germany and the United Kingdom registered 24.6% and 21.0%, respectively, of the total of overnight stays by foreigners in February. The German market experienced an 8.9% annual decrease and the British market decreased 2.1%.

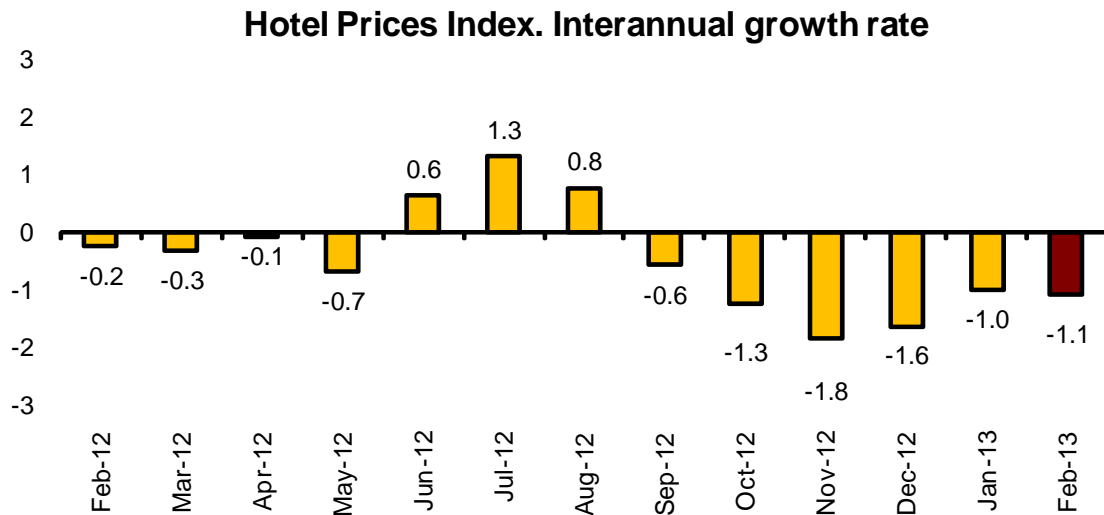
Overnight stays of guests from France, Sweden and Netherlands (the following countries of origin) registered annual rates of -5.5%, 8.3% and 0.9%, respectively.

**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  $-1.1\%$  in February, this rate being 0.1 points lower as compared with last month and 0.9 points lower than that registered last year.



Canarias, Comunidad de Madrid, Cataluña and Andalucía, that carried 75.4% of the total weight of the HPI in the month of February, showed uneven performance in their prices.

Canarias, which carried the greatest load in the weighting structure this month, presented an interannual rate of 1.0%, 0.6 points lower than that estimated in January. Hotel prices experienced a decrease of 0.7% in Cataluña, 1.8 more points as compared with the previous month. Andalucía showed a rate of  $-2.1\%$ , as compared with the  $-1.9\%$  registered in the last month. Comunidad de Madrid presented an annual variation of  $-3.5\%$ , 0.3 points more than in January.

Hotel prices decreased in three and two-silver-star hotels ( $-4.4\%$ ), in two-gold-star hotels ( $-3.4\%$ ), in three-gold-star hotels ( $-3.3\%$ ) and in one-silver star ( $-2.2\%$ ) and one-gold-star ( $-1.7\%$  in both cases) and in four-gold-star hotels ( $-1.1\%$ ).

Conversely, in February prices increased in five-gold-star establishments (3.7%) .

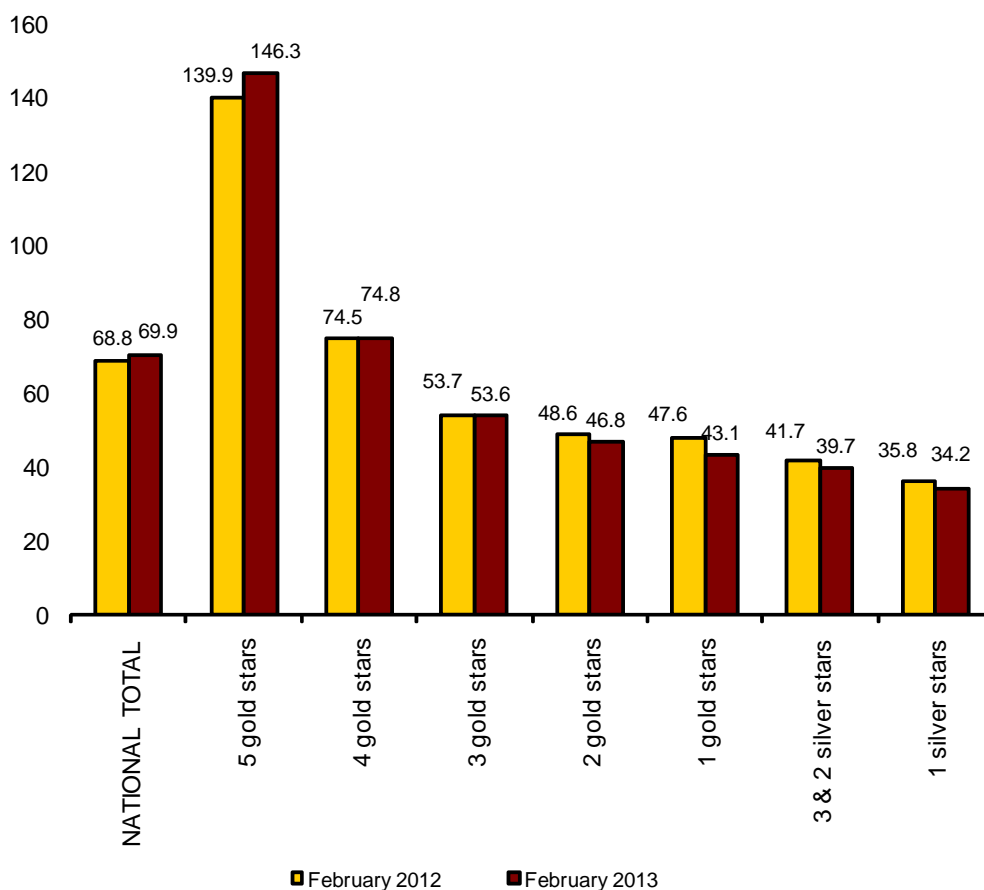
### Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in February was 69.9 euros, a 1.6% increase as compared with the same month in 2012.

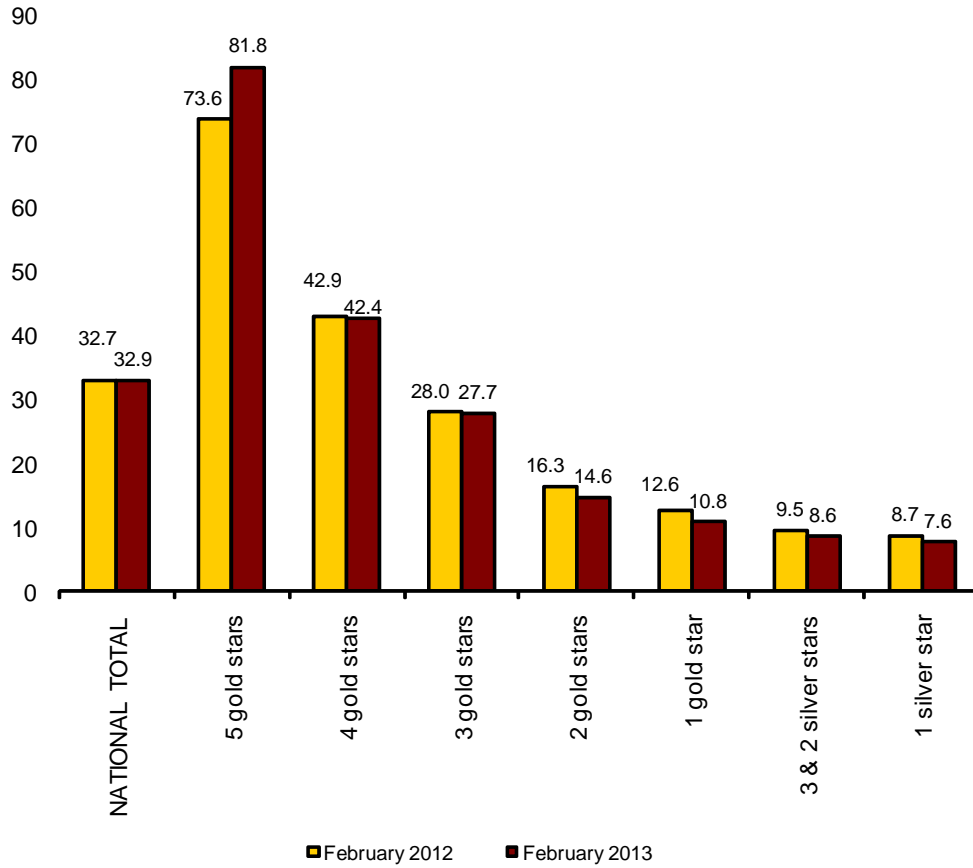
In turn, income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 32.9 euros, with an increase of 0.6% as compared with February 2012.

By category, the average invoicing was 146.3 euros for five-star hotels, 74.8 euros for four-star hotels and 53.6 euros for three-star hotels. Income per available room for these same categories was 81.8, 42.4 and 27.7 euros, respectively.

**Average daily rate (ADR)**



**Revenue per available room (RevPAR)**



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

February 2013

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	
<b>TOTAL</b>	<b>4,349,766</b>	<b>2,535,554</b>	<b>1,814,212</b>	<b>13,074,533</b>	<b>5,238,466</b>	<b>7,836,067</b>	<b>3.01</b>
HOTELS: Golden stars							
Five	293,214	111,948	181,265	981,427	210,473	770,954	3.35
Four	2,109,680	1,138,057	971,622	6,757,413	2,233,734	4,523,679	3.20
Three	1,165,265	738,165	427,100	3,610,069	1,691,353	1,918,715	3.10
Two	315,987	228,501	87,486	677,774	426,828	250,945	2.14
One	109,400	79,518	29,882	230,836	149,374	81,462	2.11
INNS: Silver stars							
Two and three	192,531	138,097	54,434	394,356	270,340	124,016	2.05
One	163,690	101,267	62,423	422,658	256,362	166,296	2.58
Interannual rate	-8.66	-12.53	-2.64	-7.69	-15.29	-1.80	1.07
Cumulative interannual rate	-8.29	-12.15	-2.46	-6.52	-13.99	-1.10	1.93

### 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	
<b>TOTAL</b>	<b>12,915</b>	<b>1,126,810</b>	<b>41.20</b>	<b>45.62</b>	<b>47.30</b>	<b>139,925</b>
HOTELS: Golden stars						
Five	231	73,493	47.47	49.39	56.15	19,898
Four	1,732	492,471	48.66	53.03	56.82	68,660
Three	2,001	280,895	45.65	50.73	52.05	31,106
Two	1,577	87,631	27.56	33.76	31.97	6,721
One	1,003	39,914	20.61	25.20	25.16	3,039
INNS: Silver stars						
Two and three	2,755	78,117	17.99	21.73	21.82	5,721
One	3,615	74,288	20.29	23.49	24.23	4,780
Interannual rate	-2.20	-2.89	-1.50	-4.20	-0.97	-5.26

### 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	Per rooms at weekend		
<b>Tourist areas with a greater level of occupancy per month</b>									
Sur de Tenerife	24,049	164,455	128,990	1,341,739	78.90	78.89	87.80	7.80	11,874
Sur de Gran Canaria	15,389	127,965	65,054	1,103,811	77.96	77.64	86.14	8.15	9,516
Isla de Tenerife	55,647	197,804	258,684	1,637,327	77.74	77.94	86.14	7.48	15,133
Isla de Gran Canaria	32,508	144,144	109,876	1,176,661	76.45	76.81	85.30	7.28	10,465
Isla de La Gomera	1,932	5,317	3,348	30,146	67.72	75.24	68.03	4.62	381
Isla de Lanzarote	12,847	63,980	73,568	526,889	64.92	64.35	73.93	7.82	4,904
Isla de Fuerteventura	5,759	76,294	19,266	678,960	56.50	54.05	63.70	8.51	6,269
Barcelona	108,537	312,340	195,872	806,252	49.38	52.29	62.27	2.38	11,800

<b>Tourist areas with a greater number of overnight stays per month *</b>									
Costa Blanca	125,308	59,085	433,211	327,599	48.50	56.78	52.58	4.13	5,973
Costa del Sol	86,882	98,286	245,739	457,893	45.35	48.93	51.92	3.80	6,629
Isla de Mallorca	39,104	59,841	139,245	371,917	45.87	44.52	54.25	5.17	4,914
Palma - Calvià	33,946	41,165	131,261	220,357	47.08	46.38	55.34	4.68	3,457
Costa Brava	46,151	31,352	86,769	84,136	29.62	38.70	31.33	2.21	1,949
Costa de Almería	34,497	6,987	116,905	49,070	30.44	34.72	43.55	4.00	1,375
Costa de la Luz de Cádiz	59,928	18,361	107,199	57,427	28.05	41.89	36.86	2.10	2,086
Pirineo Aragonés	40,904	2,167	105,522	7,204	35.04	48.23	31.58	2.62	1,037

<b>Tourist sites with a greater level of occupancy per month</b>									
Arona	4,732	48,205	30,248	418,548	85.07	84.15	91.43	8.48	3,078
Puerto De La Cruz	16,465	22,316	94,179	252,922	81.41	82.64	86.55	8.95	2,480
Mogán	1,132	32,251	5,074	292,840	80.83	81.56	89.48	8.92	1,933
Adeje	10,886	86,314	61,043	721,854	78.83	77.68	87.74	8.05	6,608
San Bartolomé De Tirajana	14,095	95,580	59,687	813,067	77.18	76.58	85.11	7.96	7,588
Yaiza	6,025	32,751	43,501	270,713	72.84	73.58	82.25	8.10	2,515
Palmas De Gran Canaria (Las)	14,621	14,279	36,959	69,167	66.69	70.53	80.59	3.67	798
Benalmádena	4,646	8,784	36,854	78,018	66.53	68.32	79.21	8.55	695
Benidorm	67,716	34,952	324,759	249,473	62.12	69.63	64.63	5.59	3,818
Monachil	17,864	5,733	41,855	17,325	60.61	67.02	68.01	2.51	410

<b>Tourist sites with a greater number of overnight stays per month *</b>									
Madrid	295,257	240,625	479,904	539,498	45.12	51.26	56.25	1.90	11,667
Barcelona	103,278	302,571	182,903	779,257	50.18	52.85	62.22	2.37	11,453
Pájara	1,789	49,614	7,615	453,753	55.96	53.56	62.03	8.98	4,300
Palma	30,334	28,367	110,933	125,347	44.89	42.71	52.40	4.03	2,414
Torremolinos	25,433	19,526	100,652	132,782	59.83	62.88	61.90	5.19	1,429
Sevilla	70,006	50,586	109,996	103,356	39.42	48.88	45.66	1.77	2,691
Valencia	57,254	43,957	88,095	108,992	41.83	44.34	53.34	1.95	1,930
Granada	67,222	39,910	118,186	64,792	51.80	71.58	51.82	1.71	1,447
Tías	2,069	16,747	10,995	144,016	57.90	55.76	65.31	8.24	1,372
Calvià	4,957	14,173	28,817	95,906	51.77	56.02	64.54	6.52	1,088

\* 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	%
<b>TOTAL</b>	<b>4,349,766</b>	<b>100.00</b>	<b>13,074,533</b>	<b>100.00</b>
Residents in Spain	2,535,554	58.29	5,238,466	40.07
Residents abroad	1,814,212	41.71	7,836,067	59.93
Total Residents abroad	1,814,212	100.00	7,836,067	100.00
Total Residents in U.E. (without Spain)	1,261,430	69.53	6,282,371	80.17
- Germany	274,554	15.13	1,923,665	24.55
- Austria	17,133	0.94	90,146	1.15
- Belgium	53,658	2.96	299,781	3.83
- Denmark	27,507	1.52	168,091	2.15
- Finland	27,746	1.53	155,072	1.98
- France	172,259	9.49	462,515	5.90
- Greece	7,049	0.39	18,546	0.24
- Ireland	25,701	1.42	118,874	1.52
- Italy	99,464	5.48	297,291	3.79
- Luxembourg	3,108	0.17	18,399	0.23
- Netherlands	70,618	3.89	339,250	4.33
- Poland	17,951	0.99	87,502	1.12
- Portugal	57,236	3.15	116,599	1.49
- United Kingdom	303,208	16.71	1,646,527	21.01
- Czech Republic	6,527	0.36	27,676	0.35
- Sweden	63,958	3.53	410,615	5.24
- Rest of UE*	32,217	1.78	97,082	1.24
Norway	38,740	2.14	259,296	3.31
Russia	32,541	1.79	113,701	1.45
Switzerland	32,848	1.81	131,078	1.67
Rest of Europe	42,876	2.36	126,869	1.62
Japan	60,036	3.31	104,597	1.33
United States of America	69,348	3.82	173,241	2.21
Rest of America	103,439	5.70	257,615	3.29
African's countries	30,868	1.70	72,188	0.92
Rest of the world	143,621	7.92	319,850	4.08

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

## Hotel Price Index (HPI). 2008 Base

February 2013

Provisional data

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

	Index	Interannual variation rate
<b>TOTAL</b>	<b>87.6</b>	<b>-1.1</b>
Andalucía	89.1	-2.1
Aragón	74.8	-6.5
Asturias, Principado de	80.4	-5.7
Balears, Illes	94.1	2.0
Canarias	97.7	1.0
Cantabria	84.5	-7.4
Castilla y León	87.8	-4.2
Castilla - La Mancha	87.9	-3.1
Cataluña	81.7	-0.7
Comunitat Valenciana	84.2	-1.1
Extremadura	82.6	-5.6
Galicia	87.9	-5.8
Madrid, Comunidad de	75.7	-3.5
Murcia, Región de	76.1	-5.0
Navarra, Comunidad Foral de	81.3	-7.4
País Vasco	87.8	1.1
Rioja, La	82.8	-3.8
Ceuta	94.8	-7.1
Melilla	90.8	2.9

### National General Index and breakdown by categories

	Index	Interannual variation rate
<b>TOTAL</b>	<b>87.6</b>	<b>-1.1</b>
<b>HOTELS: Gold stars</b>		
Five	84.1	3.7
Fourth	87.2	-1.1
Three	87.4	-3.3
Two	88.1	-3.4
One	95.2	-1.7
<b>HOSTALS: Silver stars</b>		
Three and two	87.0	-4.4
One	98.3	-2.2

## Indicators on the Profitability of the Hotel Sector

February 2013

Provisional data

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

	ADR (in euros)	Variation Rate variation	RevPar (in euros)	Variation Rate variation
<b>TOTAL</b>	<b>69.9</b>	<b>1.7</b>	<b>32.9</b>	<b>0.5</b>
Andalucía	56.4	-2.5	23.6	-2.9
Aragón	56.5	-6.0	15.6	-19.0
Asturias, Principado de	51.7	-1.0	12.2	2.1
Balears, Illes	55.7	3.2	30.0	11.3
Canarias	79.3	2.7	62.7	1.4
Cantabria	56.3	-6.1	13.4	-7.9
Castilla y León	50.1	-5.7	12.3	-10.9
Castilla - La Mancha	54.7	-1.6	12.5	-8.9
Cataluña	94.3	7.1	43.2	3.6
Comunitat Valenciana	50.1	0.7	23.0	1.5
Extremadura	50.2	-6.7	12.4	-15.3
Galicia	46.5	-6.5	10.7	-5.7
Madrid, Comunidad de	76.6	-2.5	39.6	-7.6
Murcia, Región de	49.2	-3.5	19.5	1.3
Navarra, Comunidad Foral de	55.9	-5.7	14.7	-11.9
País Vasco	64.9	1.1	26.3	-1.3
Rioja, La	56.2	-3.3	21.3	13.5
Ceuta	63.8	-8.2	27.7	-24.9
Melilla	65.8	6.3	28.8	-3.3

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

	ADR (in euros)	Variation Rate interannual	RevPar (in euros)	Variation Rate interannual
<b>TOTAL</b>	<b>69.9</b>	<b>1.7</b>	<b>32.9</b>	<b>0.5</b>
<b>HOTELS: Gold stars</b>				
Five	146.3	4.6	81.8	11.1
Four	74.8	0.4	42.4	-1.2
Three	53.6	-0.2	27.7	-0.8
Two	46.8	-3.8	14.6	-10.6
One	43.1	-9.5	10.8	-14.5
<b>GUESTHOUSES: Silver stars</b>				
Three and two	39.7	-4.7	8.6	-9.5
One	34.2	-4.5	7.6	-12.6

(\*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room