

23 April 2013

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

**Overnight stays in hotel establishments increase 8.3% in March, as compared with the same month in 2012**

**Hotels earn 34.8 euros per available room and invoice an average of 68.4 euros per occupied room**

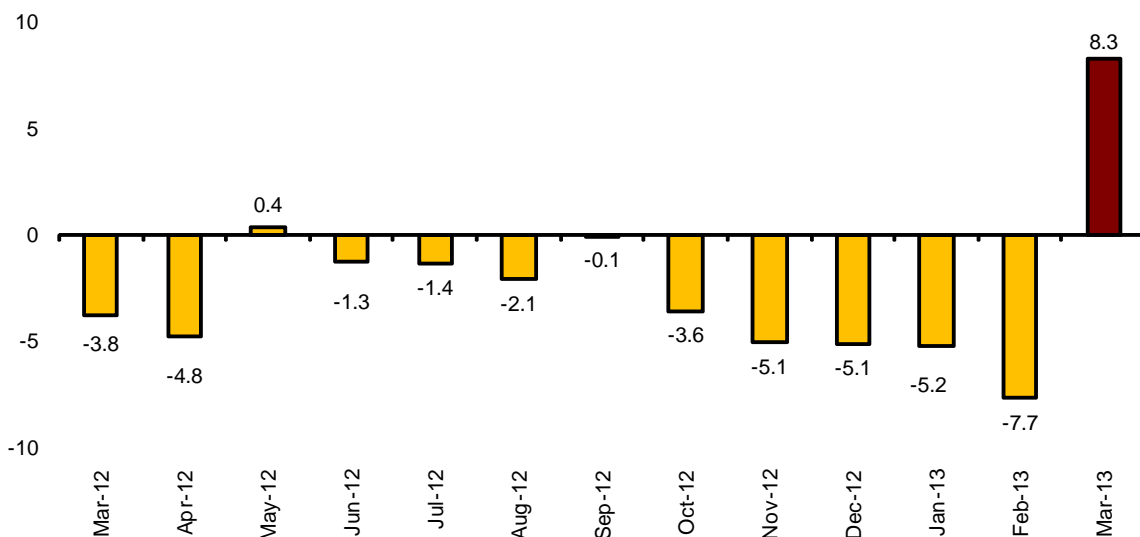
During the month of March, 18.8 million overnight stays were recorded in hotel establishments, indicating an 8.3% increase as compared with the same month in 2012. Overnight stays for residents increased by 10.1%, as well as for non-residents that did so by 6.8%.

The average stay increased 1.1%, as compared with March 2012, standing at 3.1 nights per guest.

During the first quarter of 2013, overnight stays decreased 0.7% as compared with the same month of the previous year.

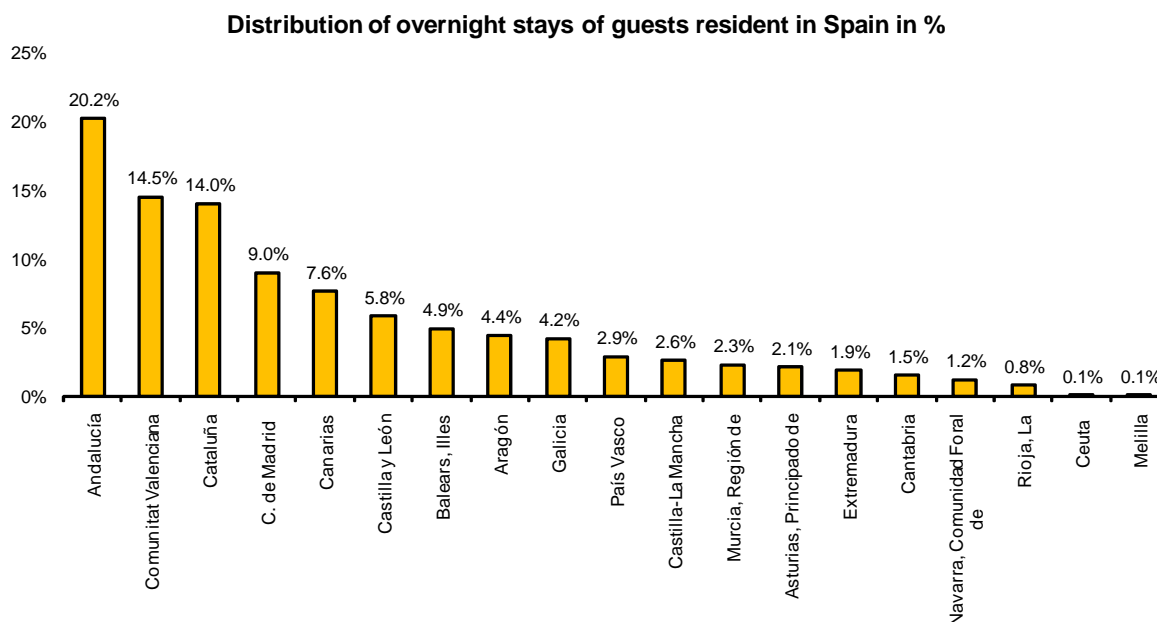
Due to the fact that Easter was celebrated during the month of March, and that in 2012 it was celebrated in April, it would be advisable to wait to the results of the survey of next month in order to analyse both months jointly.

**Interannual rates of overnight stays in %**

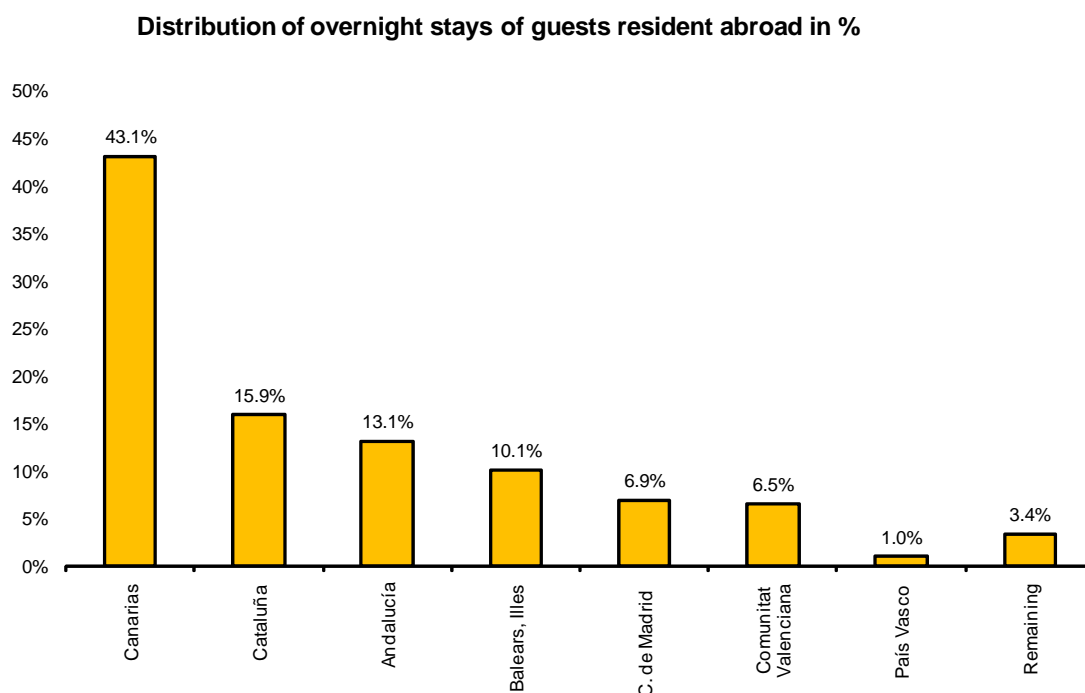


### Main destinations

Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with interannual rates for overnight stays of 17.7%, 15.7%, 9.7% and –5.4%, respectively.



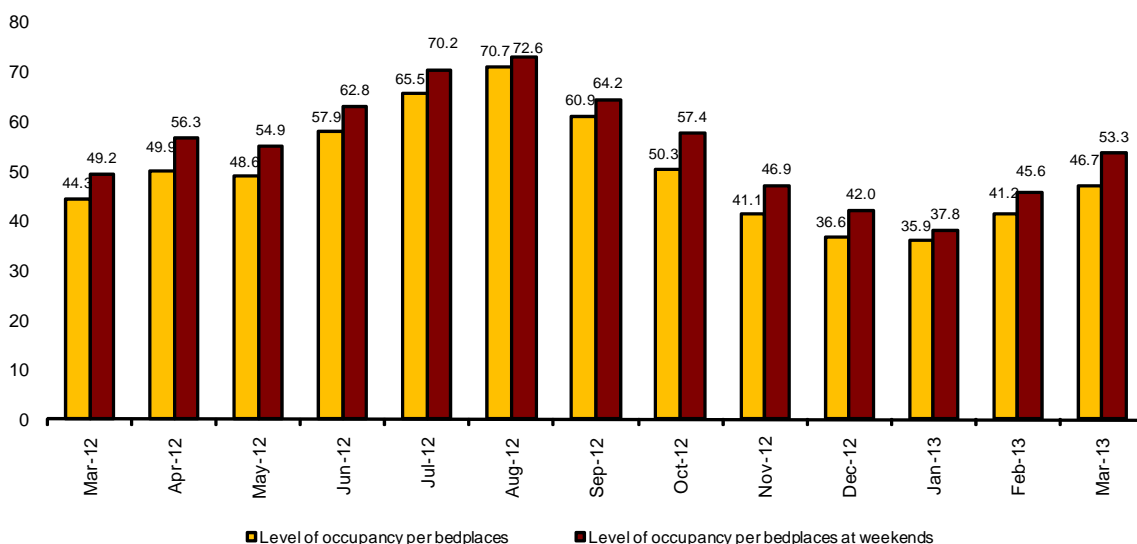
The main destination chosen by non-residents was Canarias. In this Autonomous Community, overnight stays by foreign nationals increased by 4.6%, as compared with the same month of 2012. Followed by Cataluña, with an annual rate of 14.6%, and Andalucía, with a decrease of 1.9%.



### Hotel Occupancy

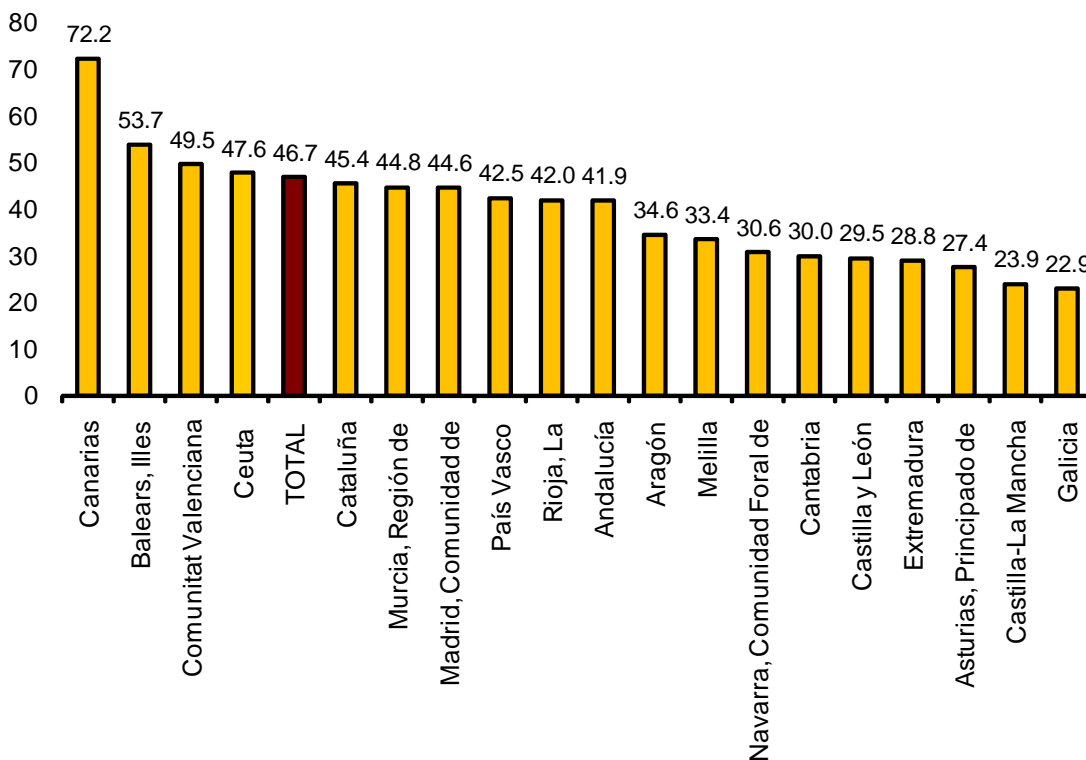
In terms of occupancy, 46.7% of the available bedplaces were occupied in March, with an annual increase of 5.5%. The weekend occupancy rate by bedplaces increased 8.3% and stood at 53.3%.

Level of occupancy per bedplaces and per bedplaces at weekends



During the month of March, Canarias was the Autonomous Community with the highest occupancy rate by bedplaces (72.2%), followed by Illes Balears (53.7%) and Comunitat Valenciana (49.5%).

Level of occupancy per bedplaces by Automous Communities



The South of Tenerife presented the highest occupancy rate by bedplaces (78.6%) as well as the highest weekend occupancy rate by bedplaces (79.9%). In the island of Tenerife more than 2 million of overnight stays were registered in March.

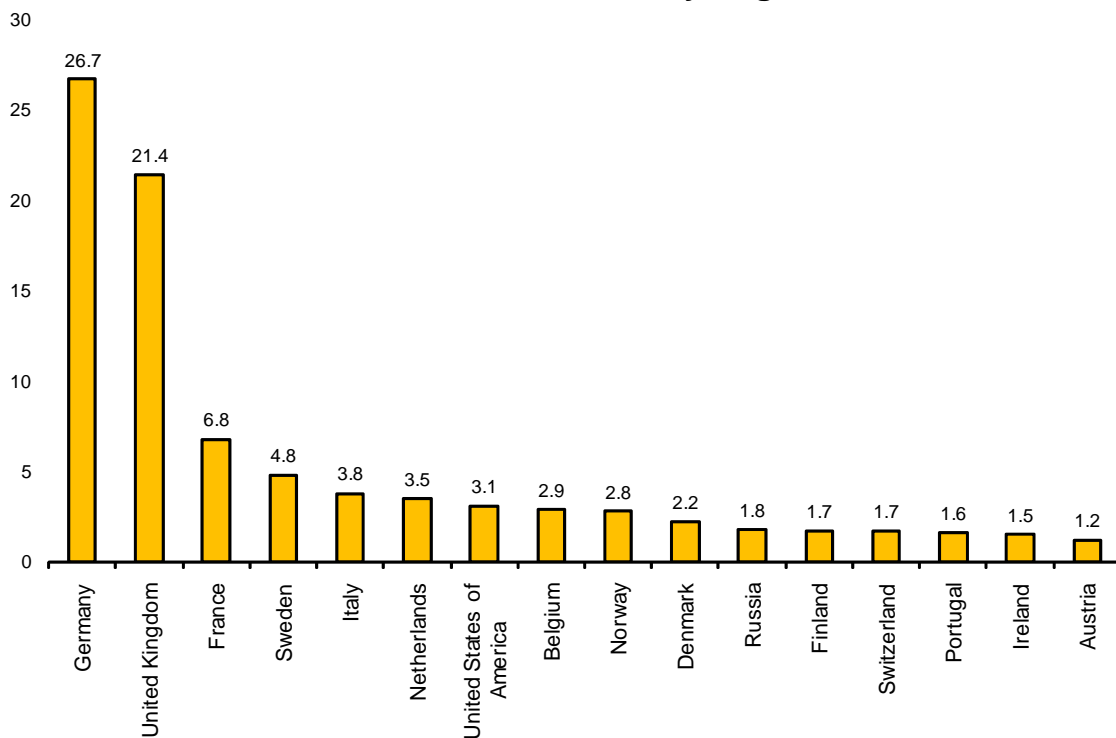
The tourist sites with the highest number of overnight stays were Madrid, Barcelona y San Bartolomé de Tirajana. Arona reached both the highest occupancy rate by bedplaces (84.8%) and the highest weekend occupancy (86.9%).

### Overnight stays of guests resident abroad

Guests from Germany and the United Kingdom registered 26.7% and 21.4%, respectively, of the total of overnight stays by foreigners in March. The German market experienced a 3.2% annual increase and the British market did so by 9.3%.

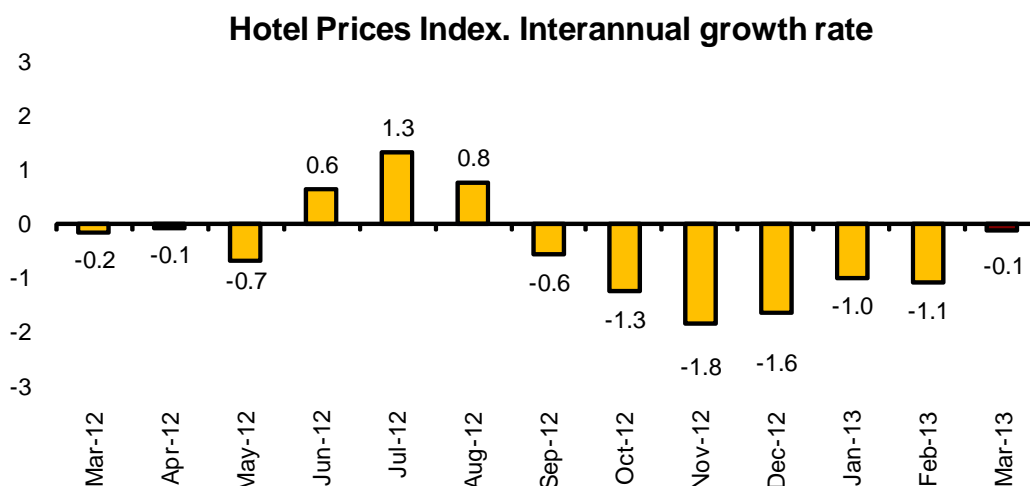
Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of 19.2%, 18.6% and -10.2%, respectively.

**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  $-0.1\%$  in March, being this rate 1.0 points higher than that of last month and 0.1 points than that registered last year.



The four Autonomous Communities (Canarias, Cataluña, Andalucía and Comunidad de Madrid) that carried 71.7% of the total load of the HPI in the month of March, showed uneven performance in their prices.

Canarias, which carried the greatest load in the weighting structure this month, presented an interannual rate of 3.0%, 2.0 points higher than that estimated in February. Hotel prices experienced a decrease of 2.2% in Cataluña, 1.6 less points as compared with the previous month. Andalucía showed a rate of 2.4%, as compared with the  $-2.1\%$  registered in the last month. Comunidad de Madrid presented an annual variation of  $-5.5\%$ , 2.1 points less than in February.

Hotel prices decreased in three and two-silver-star hotels ( $-3.1\%$ ), in one-silver-star hotels ( $-2.4\%$ ), in two-gold-star hotels ( $-1.9\%$ ) and in three-gold-star hotels ( $-1.1\%$ ).

Conversely, in March prices rose in five-gold-star establishments (1.6%) and in four-gold-star establishments (0.2%).

In the establishments with one-gold-star hotels prices did not change, as compared with the same month of the previous year.

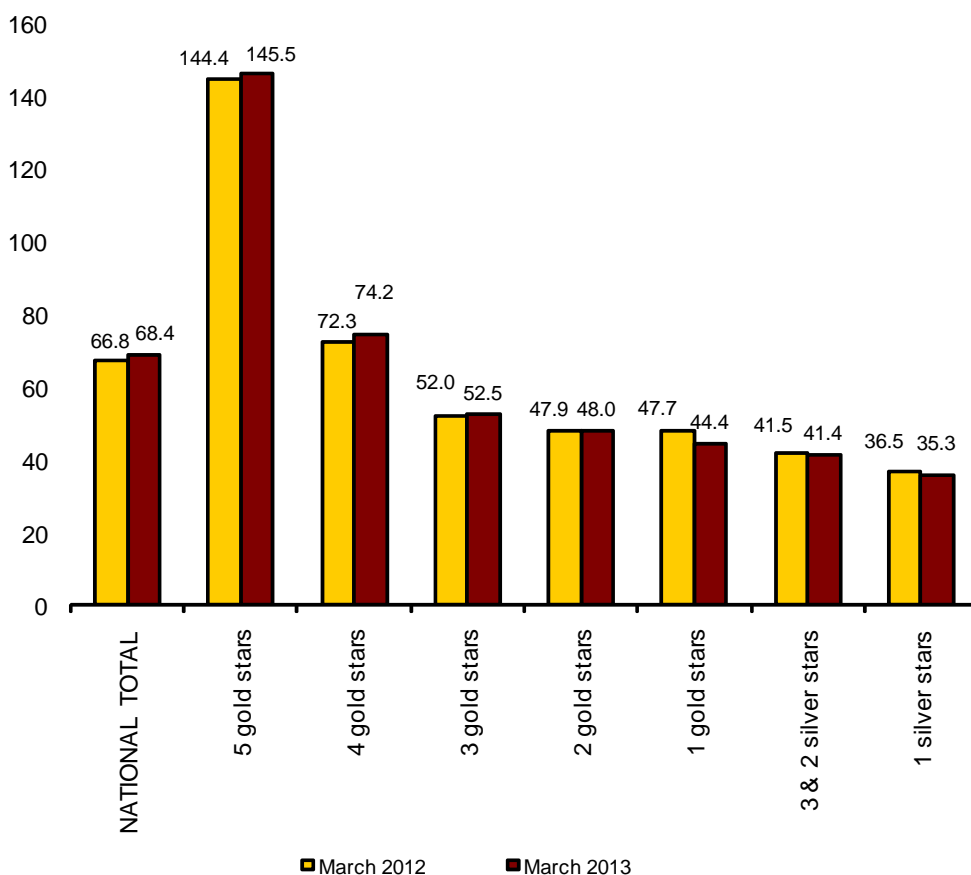
### Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in March was 68.4 euros, a 2.2% increase as compared with the same month in 2012.

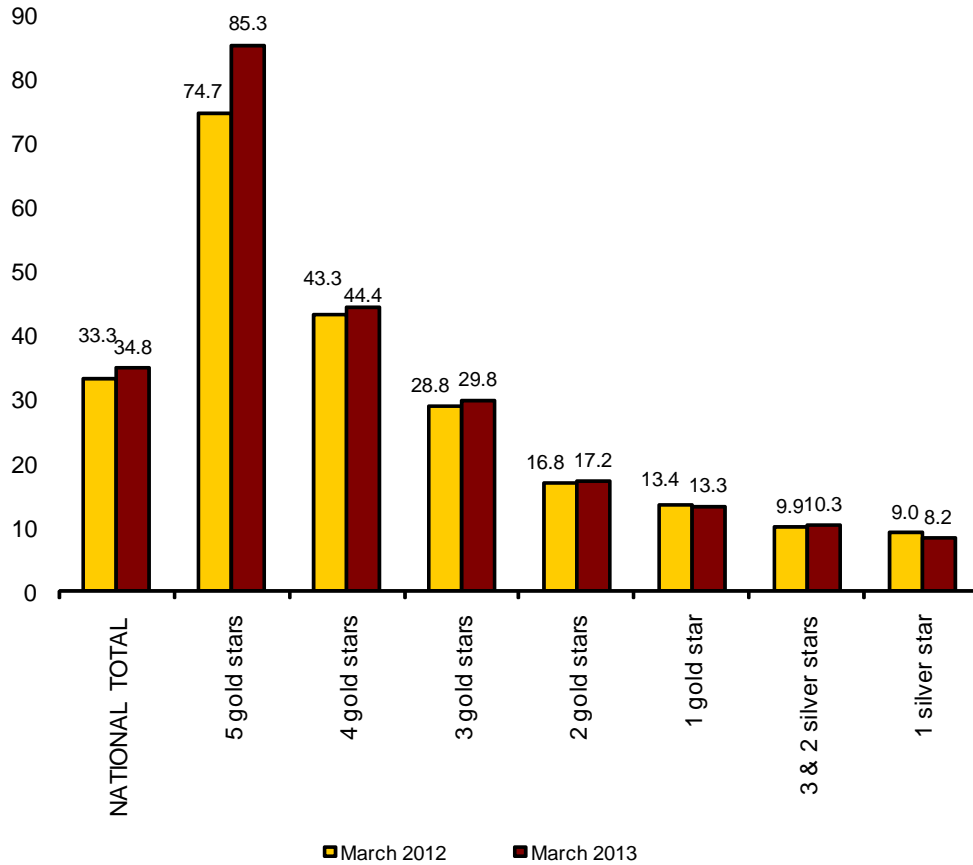
In turn, income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 34.8 euros, with a growth of 4.4% as compared with March 2012.

By category, the average invoicing was 145.5 euros for five-star hotels, 74.2 euros for four-star hotels and 52.5 euros for three-star hotels. Income per available room for these same categories was 85.3, 44.4 and 29.8 euros, respectively.

**Average daily rate (ADR)**



**Revenue per available room (RevPAR)**



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

March 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>6,177,643</b>	<b>3,594,050</b>	<b>2,583,593</b>	<b>18,828,617</b>	<b>8,303,927</b>	<b>10,524,690</b>	<b>3.05</b>
HOTELS: Golden stars							
Five	369,574	137,224	232,350	1,263,128	306,432	956,695	3.42
Four	2,916,854	1,561,573	1,355,281	9,490,640	3,497,503	5,993,138	3.25
Three	1,766,741	1,100,738	666,003	5,616,028	2,864,581	2,751,447	3.18
Two	462,817	331,611	131,206	1,001,737	656,070	345,667	2.16
One	162,219	116,487	45,732	356,499	237,496	119,003	2.20
INNS: Silver stars							
Two and three	278,183	206,365	71,818	570,465	406,690	163,775	2.05
One	221,254	140,051	81,203	530,118	335,154	194,964	2.40
Interannual rate	7.04	7.45	6.46	8.25	10.10	6.83	1.14
Cumulative interannual rate	-2.22	-4.56	1.19	-0.70	-4.32	1.98	1.55

### 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>14,184</b>	<b>1,284,668</b>	<b>46.74</b>	<b>53.30</b>	<b>51.01</b>	<b>158,342</b>
HOTELS: Golden stars						
Five	247	77,219	52.20	58.46	58.28	21,129
Four	1,931	558,196	54.22	60.27	59.94	76,822
Three	2,293	340,133	52.52	59.33	56.88	37,873
Two	1,797	100,004	32.07	41.15	36.12	8,042
One	1,113	43,906	26.05	33.08	30.05	3,446
INNS: Silver stars						
Two and three	2,933	83,509	21.94	29.01	25.03	5,902
One	3,871	81,702	20.87	26.22	24.88	5,128
Interannual rate	0.70	2.06	5.55	8.29	2.10	-1.32

### 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	38,919	185,251	195,266	1,426,155	78.58	79.91	87.18	7.23	12,064
Isla de Tenerife	73,959	221,526	344,795	1,714,949	76.21	77.48	83.59	6.97	15,359
Sur de Gran Canaria	22,317	137,328	93,393	1,152,841	76.03	76.15	82.67	7.81	9,296
Isla de Gran Canaria	39,751	156,111	136,826	1,232,328	74.32	74.89	81.84	6.99	10,267
Isla de Lanzarote	20,546	80,521	93,090	640,809	70.40	71.83	79.81	7.26	5,006
Isla de Fuerteventura	10,739	101,924	38,601	867,208	66.12	67.56	73.86	8.04	6,535
Isla de La Gomera	1,697	5,603	2,559	31,069	62.00	61.66	66.07	4.61	382
Barcelona	128,899	404,183	251,078	1,070,865	57.84	63.72	65.81	2.48	11,860

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

Isla de Mallorca	71,860	175,678	342,801	1,049,021	54.04	58.19	60.00	5.62	10,477
Costa Blanca	178,395	90,084	663,234	456,161	56.25	63.46	57.45	4.17	6,896
Costa del Sol	128,309	162,189	384,117	686,265	51.95	53.00	54.94	3.68	8,196
Palma - Calvià	46,487	94,745	254,017	497,540	54.34	57.35	60.12	5.32	5,811
Costa Brava	100,434	75,016	234,409	224,560	39.25	49.44	41.22	2.62	3,536
Costa Daurada	84,961	26,497	211,453	82,042	39.37	45.53	41.30	2.63	1,685
Costa de Almería	54,504	10,627	223,881	57,492	38.52	41.14	50.24	4.32	1,702
Costa de la Luz de Cádiz	65,245	36,543	148,668	129,681	31.56	39.66	37.34	2.73	2,936

#### Tourist sites with a greater level of occupancy per month

Arona	9,178	57,040	52,067	445,572	84.80	86.90	92.09	7.52	3,232
Mogán	2,028	36,918	7,216	311,014	78.19	78.80	86.09	8.17	1,910
Adeje	19,127	95,809	96,647	760,447	77.94	79.63	87.20	7.46	6,593
San Bartolomé De Tirajana	20,436	100,298	86,649	840,697	75.27	75.26	81.55	7.68	7,390
Yaiza	11,013	39,864	56,235	308,255	75.01	78.72	84.40	7.16	2,568
Puerto De La Cruz	20,433	25,745	112,135	242,461	74.77	76.28	76.67	7.68	2,494
Pájara	4,474	68,019	18,821	615,487	68.96	68.94	73.43	8.75	4,783
Torremolinos	27,419	38,309	138,009	206,357	67.78	63.82	68.77	5.24	1,869
Tías	2,942	23,329	14,264	186,348	67.51	62.01	75.46	7.64	1,373
Teguise	3,783	16,520	16,151	140,989	67.38	73.06	79.78	7.74	956

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

Barcelona	123,137	392,597	234,592	1,043,234	59.19	65.65	67.23	2.48	11,469
Madrid	323,428	291,778	565,055	665,078	48.78	60.43	58.27	2.00	11,421
Benidorm	97,720	50,460	461,542	332,435	67.32	74.71	66.92	5.36	4,373
Palma	36,836	59,789	180,957	280,958	56.07	56.95	62.30	4.78	3,472
Sevilla	88,446	80,238	156,255	171,552	54.38	59.63	58.42	1.94	2,761
Valencia	84,303	57,150	155,136	124,600	51.79	62.30	57.90	1.98	1,929
Calvià	12,474	31,766	85,964	189,165	50.06	54.35	55.38	6.22	2,194
Granada	77,338	57,366	151,468	98,685	60.55	77.82	63.22	1.86	1,537
Lloret De Mar	30,033	33,550	119,652	121,651	55.85	62.11	56.08	3.80	1,031
Roquetas De Mar	21,162	2,652	136,072	30,605	47.34	50.90	65.22	7.00	762

\* 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>6,177,643</b>	<b>100.00</b>	<b>18,828,617</b>	<b>100.00</b>
Residents in Spain	3,594,050	58.18	8,303,927	44.10
Residents abroad	2,583,593	41.82	10,524,690	55.90
Total Residents abroad	2,583,593	100.00	10,524,690	100.00
Total Residents in U.E. (without Spain)	1,836,278	71.07	8,509,471	80.85
- Germany	463,179	17.93	2,810,911	26.71
- Austria	31,320	1.21	126,111	1.20
- Belgium	66,530	2.58	308,158	2.93
- Denmark	40,265	1.56	232,494	2.21
- Finland	34,616	1.34	181,705	1.73
- France	254,544	9.85	710,153	6.75
- Greece	6,989	0.27	15,636	0.15
- Ireland	35,458	1.37	154,847	1.47
- Italy	139,243	5.39	397,164	3.77
- Luxembourg	5,088	0.20	30,984	0.29
- Netherlands	83,939	3.25	372,976	3.54
- Poland	20,974	0.81	82,549	0.78
- Portugal	80,002	3.10	169,540	1.61
- United Kingdom	439,863	17.03	2,247,817	21.36
- Czech Republic	8,826	0.34	33,264	0.32
- Sweden	82,118	3.18	499,879	4.75
- Rest of UE*	43,322	1.68	135,282	1.29
Norway	48,776	1.89	297,570	2.83
Russia	51,193	1.98	189,958	1.80
Switzerland	50,853	1.97	177,381	1.69
Rest of Europe	58,206	2.25	163,237	1.55
Japan	70,251	2.72	112,700	1.07
United States of America	136,641	5.29	321,208	3.05
Rest of America	146,776	5.68	338,521	3.22
African's countries	33,565	1.30	72,085	0.68
Rest of the world	151,054	5.85	342,559	3.25

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

## Hotel Price Index (HPI). 2008 Base

March 2013

Provisional data

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

	Index	Interannual variation rate
<b>TOTAL</b>	<b>88.1</b>	<b>-0.1</b>
Andalucía	85.5	2.4
Aragón	74.8	-1.1
Asturias, Principado de	82.8	1.0
Balears, Illes	95.4	1.7
Canarias	101.4	3.0
Cantabria	88.2	0.1
Castilla y León	85.9	-4.0
Castilla - La Mancha	86.1	-4.2
Cataluña	83.2	-2.2
Comunitat Valenciana	85.9	-1.1
Extremadura	85.9	0.8
Galicia	89.4	-2.6
Madrid, Comunidad de	76.0	-5.5
Murcia, Región de	75.2	-4.8
Navarra, Comunidad Foral de	79.9	-6.4
País Vasco	85.4	1.9
Rioja, La	81.2	-2.3
Ceuta	99.0	-1.2
Melilla	94.2	4.6

### National General Index and breakdown by categories

	Index	Interannual variation rate
<b>TOTAL</b>	<b>88.1</b>	<b>-0.1</b>
<b>HOTELS: Gold stars</b>		
Five	84.8	1.6
Fourth	88.0	0.2
Three	88.1	-1.1
Two	87.8	-1.9
One	92.9	0.0
<b>HOSTALS: Silver stars</b>		
Three and two	87.2	-3.1
One	97.3	-2.4

## Indicators on the Profitability of the Hotel Sector

March 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>68.4</b>	<b>2.3</b>	<b>34.8</b>	<b>4.6</b>
Andalucía	59.9	4.7	28.0	9.7
Aragón	56.4	3.5	21.0	33.7
Asturias, Principado de	53.6	6.6	16.4	19.8
Balears, Illes	57.6	7.6	34.2	5.1
Canarias	83.5	7.5	66.8	9.6
Cantabria	56.2	-4.5	17.9	2.4
Castilla y León	53.3	-0.3	16.8	7.2
Castilla - La Mancha	56.4	2.0	14.9	0.5
Cataluña	77.4	-3.1	38.4	-3.0
Comunitat Valenciana	53.6	4.3	27.8	7.8
Extremadura	59.2	10.2	18.1	-0.6
Galicia	49.7	-1.2	12.9	8.1
Madrid, Comunidad de	74.3	-6.4	39.6	-13.0
Murcia, Región de	50.7	0.3	23.9	11.8
Navarra, Comunidad Foral de	56.4	-5.0	19.3	3.5
País Vasco	68.1	5.5	33.9	11.4
Rioja, La	59.3	1.3	28.4	19.4
Ceuta	66.0	-5.7	28.8	-18.6
Melilla	65.3	4.9	25.4	-19.8

### 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>68.4</b>	<b>2.3</b>	<b>34.8</b>	<b>4.6</b>
<b>HOTELS: Gold stars</b>				
Five	145.5	0.8	85.3	14.2
Four	74.2	2.7	44.4	2.7
Three	52.5	1.0	29.8	3.4
Two	48.0	0.1	17.2	2.0
One	44.4	-7.0	13.3	-1.1
<b>GUESTHOUSES: Silver stars</b>				
Three and two	41.4	-0.4	10.3	3.9
One	35.3	-3.4	8.2	-9.2

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