

**Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)**  
March 2016. *Provisional data*

**Overnight stays in hotel establishments<sup>1</sup> register an increase of 17.6% in March, as compared to the same month of 2015**

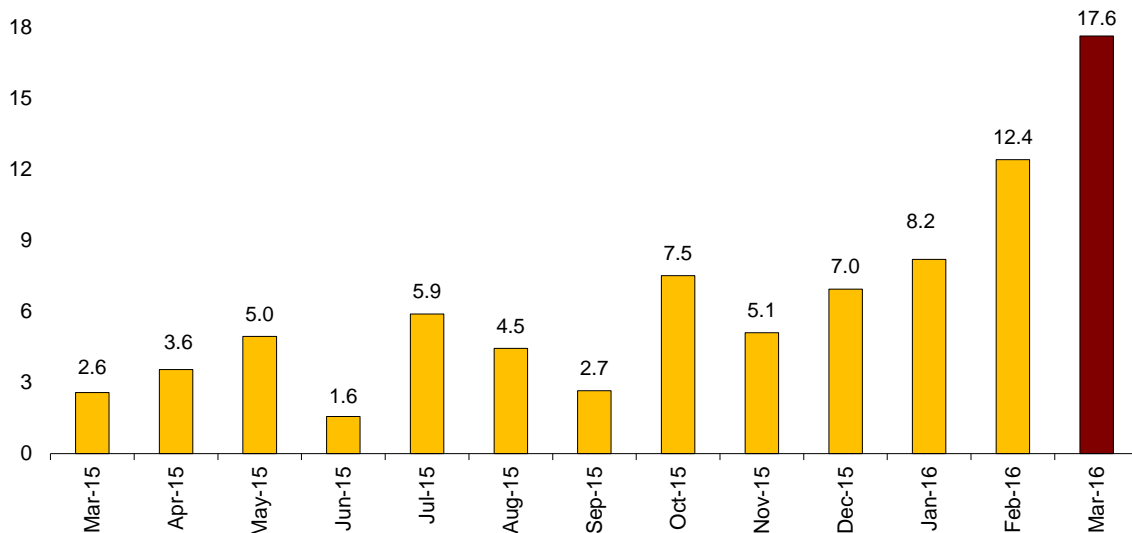
**Hotels invoice an average of 75.5 euros per available room, which means an annual increase of 2.0%**

In March, a total of 21.8 million overnight stays were registered in hotel establishments, 17.6% more than in the same month of 2015. Overnight stays for residents in Spain increased by 22.2% and those of non-residents did so by 14.4%.

The average stay increased 0.8%, as compared to March 2015, standing at 3.1 nights per guest.

During the first quarter of 2016, overnight stays increased 13.3%, as compared to the same period of the previous year.

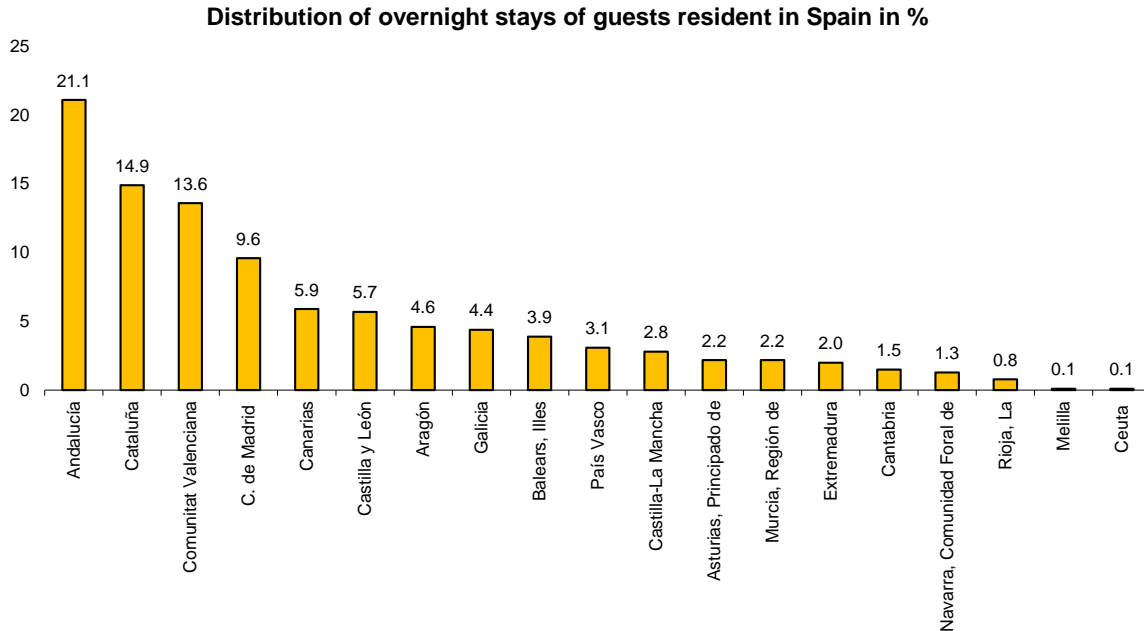
**Annual rates of overnight stays in %**



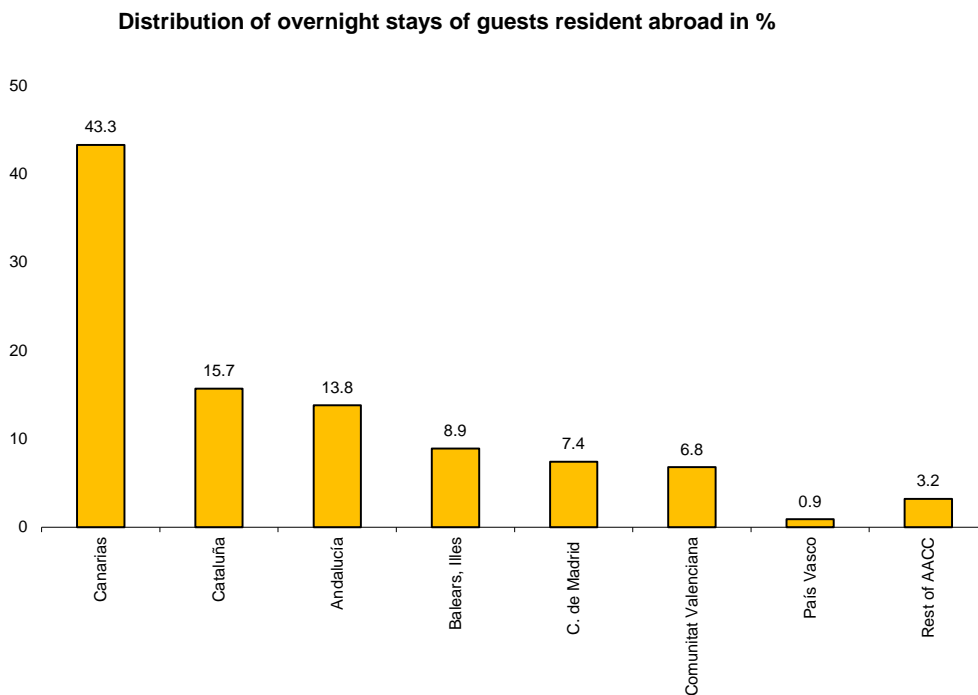
<sup>1</sup> Since 2016 Easter was celebrated in March, while in 2015 it took place between March and April, it is advisable to wait for the next month results<sup>1</sup> of this survey to jointly analyse them.

### Main destinations

In March, 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 21.1%, 26.9%, 22.9% and 8.4%, respectively.

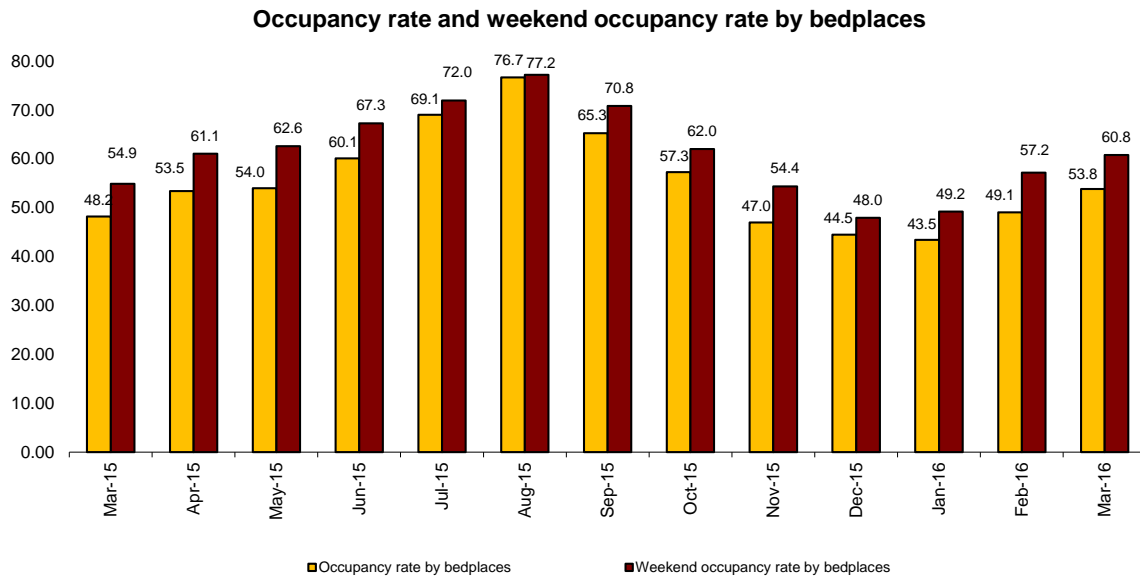


The main destination chosen by non-residents was Canarias, with 43.3% of the total amount of overnight stays. In this Autonomous Community, overnight stays by non-residents increased 10.9% as compared to March 2015. The following destinations of non-residents were Cataluña (15.7% of the total and an increase of 15.9% in overnight stays) and Andalucía (13.8% of the total and an increase of 22.9% in overnight stays).



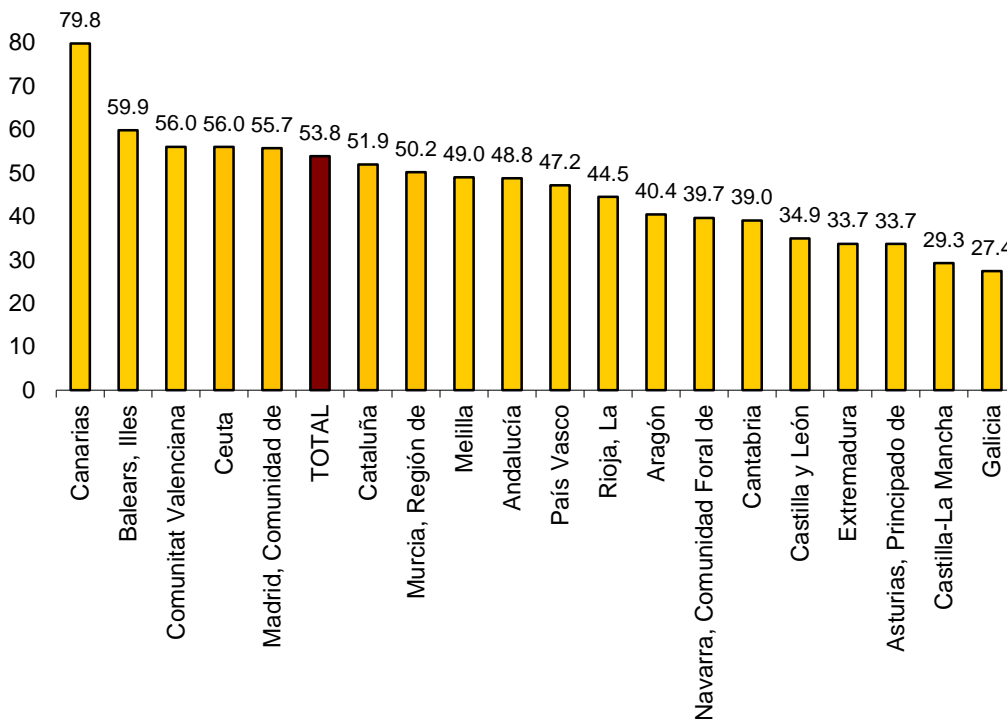
## Hotel Occupancy

In March, 53.8% of the available bedplaces were occupied, indicating an annual increase of 11.7%. The weekend occupancy rate by bedplaces increased by 10.7%, standing at 60.8%.



Canarias registered the greatest occupancy rate by bedplaces in March (79.8%), followed by Illes Balears (59.9%) and Comunitat Valenciana (56.0%).

## Occupancy rate by bedplaces by Automous Community



By tourist areas, the South of Gran Canaria registered both the highest occupancy rate by bedplaces (82.7%), and the highest weekend occupancy rate (84.0%). The island of Tenerife recorded the highest number of overnight stays, with more than 2.1 million.

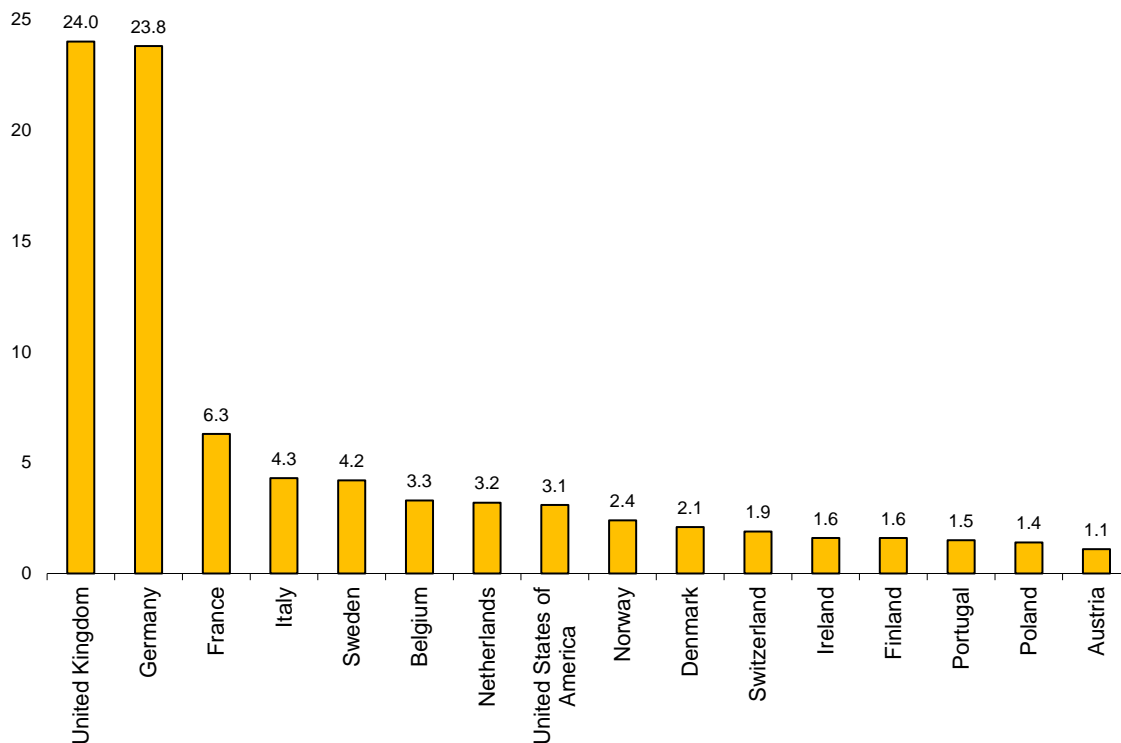
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and San Bartolomé de Tirajana. Tías reached the highest occupancy rate by bedplaces (83.7%) and Puerto de la Cruz the greatest weekend occupancy rate (87.0%).

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

Guests from the United Kingdom and Germany concentrated 24.0% and 23.8%, respectively, of the total of overnight stays in hotel establishments by non-residents in March. The British market increased by 21.2%, and the German one did so by 12.2%.

Overnight stays of guests from France, Italy and Sweden (the following countries of origin) registered annual rates of 11.2%, 23.2% and 15.0%, respectively.

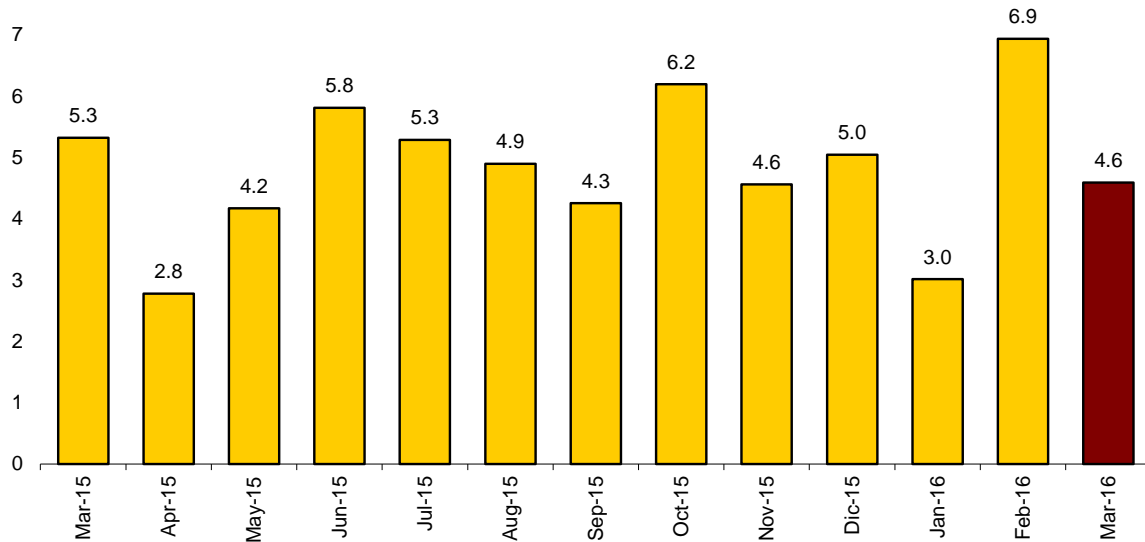
**Distribution of overnight stays of residents abroad from the main 16 countries in %**



## Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 4.6% in March, that is, 2.3 points less than that of the previous month and 0.7 points under that registered in the previous year.

**Hotel Prices Index. Annual variation rate**



Canarias, Cataluña, Andalucía and Comunidad de Madrid were the Autonomous Communities that carried the greatest weight of the total load of the HPI in the month of March (they represented 74.7% of the total). Hotel prices increased by 9.4% in the annual rate in Andalucía, 7.1% in Canarias and 5.8% in Comunidad de Madrid. However, they decreased 5.2% in Cataluña.

By hotel category, increase in hotel prices were registered in all of them. In two-golden-star establishments (6.3%), in four-golden-star establishments (5.2%), in three-silver-star and in two-silver-star establishments (4.9% in both cases), in three-golden-star establishments (4.2%), in five-golden-star establishments (2.8%), in one-golden-star establishments (1.9%), and one-silver-star establishments (1.8%).

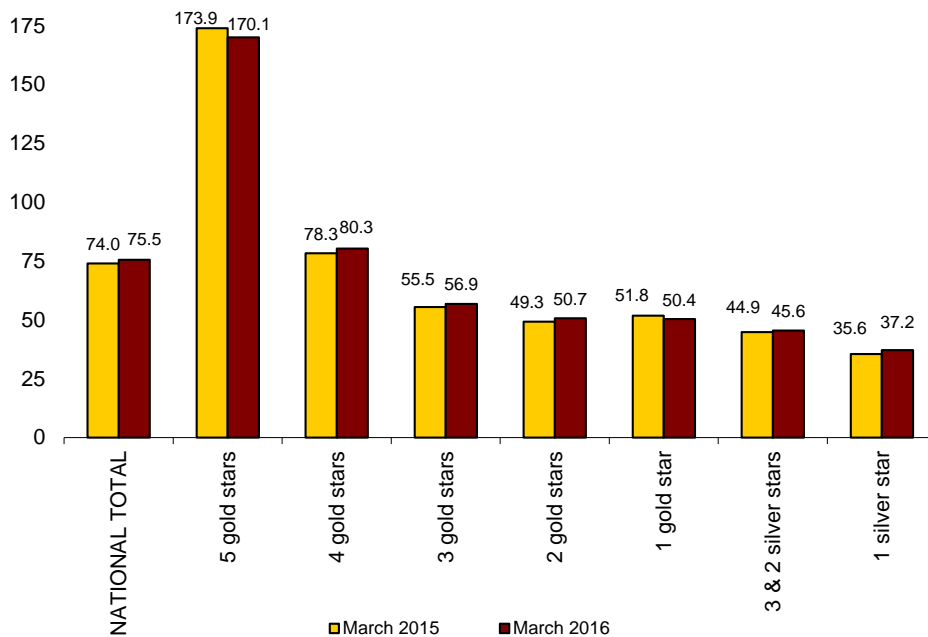
## Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in March was 75.5 euros, which represented an increase of 2.0% as compared to the same month of 2015.

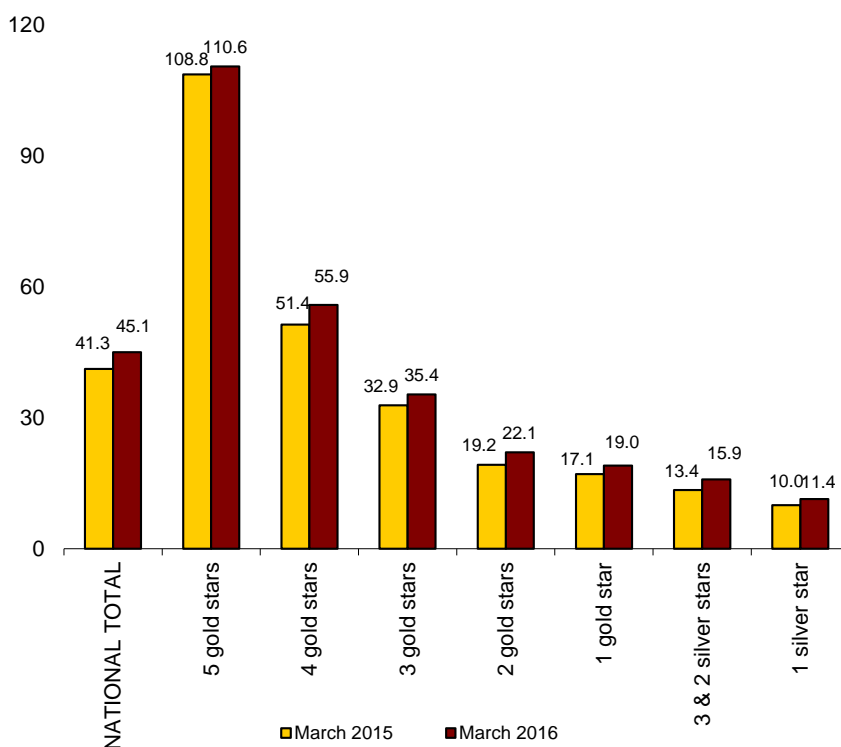
In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 45.1 euros, with an increase of 9.2%.

By category, the average invoicing was 170.1 euros for five-star hotels, 80.3 euros for four-star hotels and 56.9 euros for three-star hotels. Income per available room for the same categories were 110.6, 55.9 and 35.4 euros, respectively.

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



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



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

March 2016

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>7,176,183</b>	<b>4,103,678</b>	<b>3,072,505</b>	<b>21,877,829</b>	<b>9,430,769</b>	<b>12,447,060</b>	<b>3.05</b>
<b>HOTELS: Golden stars</b>							
Five	406,912	127,527	279,385	1,489,430	289,257	1,200,173	3.66
Four	3,505,360	1,823,011	1,682,349	11,696,692	4,298,384	7,398,308	3.34
Three	1,852,376	1,167,999	684,377	5,714,681	2,888,997	2,825,684	3.09
Two	526,162	375,587	150,575	1,155,975	755,487	400,488	2.20
One	233,228	163,157	70,071	465,269	301,666	163,603	1.99
<b>INNS: Silver stars</b>							
Two and three	381,913	277,784	104,130	752,254	520,543	231,711	1.97
One	270,232	168,614	101,618	603,528	376,434	227,094	2.23
Annual rate	16.76	17.57	15.70	17.64	22.22	14.40	0.76
Cumulative annual rate	13.53	13.07	14.15	13.30	15.15	12.07	-0.20

### 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	
<b>TOTAL</b>	<b>13,852</b>	<b>628,721</b>	<b>1,289,381</b>	<b>53.84</b>	<b>60.82</b>	<b>59.96</b>	<b>169,766</b>
<b>HOTELS: Golden stars</b>							
Five	263	39,627	81,370	57.97	62.84	65.17	25,428
Four	2,051	284,193	600,952	61.63	67.73	69.88	86,205
Three	2,266	150,239	315,890	57.45	64.28	63.18	35,650
Two	1,779	49,374	94,955	38.85	49.78	43.16	7,927
One	1,105	22,949	44,170	33.71	44.53	37.95	3,743
<b>INNS: Silver stars</b>							
Two and three	2,830	42,160	79,170	30.39	39.70	35.00	5,879
One	3,557	40,181	72,875	26.57	33.73	32.04	4,935
Annual rate	3.22	3.79	4.60	11.68	10.71	8.18	8.58

### 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				
<b>Tourist area with a greater occupancy rate per month</b>									
Sur de Gran Canaria	16,944	159,885	89,727	1,365,289	82.69	83.97	91.39	8.23	10,287
Sur de Tenerife	21,673	204,317	107,072	1,580,424	81.82	82.51	89.46	7.47	13,269
Isla de Gran Canaria	37,575	180,360	143,289	1,454,849	81.35	83.01	90.52	7.33	11,336
Isla de Tenerife	53,314	255,397	243,698	1,919,320	80.48	82.22	87.54	7.01	16,531
Isla de Lanzarote	17,734	101,926	87,497	800,218	79.75	78.69	90.24	7.42	5,798
Isla de La Gomera	1,602	4,754	4,412	38,996	78.45	79.51	86.80	6.83	428
Isla de Fuerteventura	10,983	129,881	50,502	1,114,699	77.57	77.60	85.77	8.27	7,857
Isla de La Palma	6,300	7,808	29,089	61,429	71.67	78.52	78.39	6.42	563

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

Barcelona	155,850	478,715	305,904	1,331,787	64.49	68.41	72.72	2.58	13,079
Isla de Mallorca	64,474	192,170	270,446	1,091,490	60.15	57.72	65.88	5.31	11,125
Costa Blanca	181,170	119,952	707,470	579,342	65.71	73.41	69.08	4.27	7,402
Costa del Sol	137,065	190,015	432,156	842,761	56.76	58.57	66.42	3.90	9,490
Palma - Calvià	43,091	126,364	181,167	670,352	62.38	62.68	69.02	5.03	6,422
Costa Brava	136,846	73,778	343,104	244,891	46.59	53.40	49.01	2.79	4,164
Costa Barcelona	119,762	100,581	248,997	242,044	50.86	56.44	58.89	2.23	3,568
Costa de Almería	69,891	12,673	288,654	64,539	45.44	51.11	62.73	4.28	2,149

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

Tías	4,258	32,037	21,538	256,528	83.72	82.18	90.54	7.66	1,550
San Bartolomé De Tirajana	13,858	115,632	73,673	992,059	83.36	84.93	91.21	8.23	8,112
Puerto de La Cruz	18,012	34,749	102,463	276,649	83.30	87.04	86.36	7.19	2,394
Arona	6,908	58,720	38,449	472,897	82.62	84.33	89.00	7.79	3,266
Adeje	9,065	105,305	45,480	825,208	82.01	82.78	90.56	7.61	7,183
Pájara	6,559	83,667	29,232	723,260	80.48	80.90	85.91	8.34	5,026
Mogán	3,113	44,179	16,145	370,407	80.31	81.21	91.82	8.17	2,189
Yaiza	7,241	43,437	42,783	343,046	79.39	78.37	91.48	7.61	2,775
Teguise	3,706	24,440	16,095	190,283	77.63	75.82	89.86	7.33	1,344
Benidorm	89,950	67,214	466,422	403,642	74.62	81.96	76.70	5.54	4,387

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

Barcelona	147,791	459,289	287,922	1,282,897	65.49	69.31	73.49	2.59	12,455
Madrid	366,772	373,686	645,571	835,867	58.68	68.95	70.91	2.00	11,044
Palma	27,892	73,017	92,046	365,201	58.83	60.25	65.43	4.53	3,626
Sevilla	115,532	100,961	215,343	223,437	63.50	72.97	72.09	2.03	3,405
Calvià	12,716	53,154	98,815	302,914	69.00	68.30	76.79	6.10	2,717
Torremolinos	26,089	43,979	124,137	234,068	70.22	71.60	75.50	5.11	1,929
Lloret de Mar	62,070	28,628	195,665	132,725	63.51	64.58	63.27	3.62	1,439
Valencia	82,907	60,405	160,166	167,964	57.74	71.68	67.86	2.29	2,066
Granada	88,156	68,283	172,812	121,427	66.25	78.75	70.26	1.88	1,619
Roquetas de Mar	29,359	2,871	180,851	27,359	54.63	57.06	73.97	6.46	1,016

\* 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>7,176,183</b>	<b>100.00</b>	<b>21,877,829</b>	<b>100.00</b>
Residents in Spain	4,103,678	57.18	9,430,769	43.11
Residents abroad	3,072,505	42.82	12,447,060	56.89
Total Residents abroad	3,072,505	100.00	12,447,060	100.00
Total Residents in E.U. (without Spain)	2,167,355	70.54	10,045,183	80.70
- Germany	491,284	15.99	2,963,230	23.81
- Austria	32,220	1.05	131,172	1.05
- Belgium	87,505	2.85	411,360	3.30
- Denmark	51,941	1.69	263,453	2.12
- Finland	37,218	1.21	201,007	1.61
- France	272,091	8.86	782,640	6.29
- Greece	7,648	0.25	20,123	0.16
- Ireland	47,689	1.55	201,467	1.62
- Italy	177,485	5.78	538,073	4.32
- Luxembourg	5,766	0.19	26,268	0.21
- Netherlands	94,745	3.08	403,824	3.24
- Poland	36,489	1.19	171,240	1.38
- Portugal	90,889	2.96	189,681	1.52
- United Kingdom	573,771	18.67	2,986,002	23.99
- Czech Republic	10,497	0.34	43,822	0.35
- Sweden	89,011	2.90	527,320	4.24
- Other EU countries*	61,105	1.99	184,503	1.48
Norway	44,643	1.45	294,871	2.37
Russia	34,925	1.14	114,676	0.92
Switzerland	62,485	2.03	230,190	1.85
Rest of Europe	61,269	1.99	195,264	1.57
Japan	50,873	1.66	93,753	0.75
United States of America	164,558	5.36	386,022	3.10
Rest of America	170,728	5.56	413,329	3.32
Africa	43,522	1.42	103,463	0.83
Other countries	272,147	8.86	570,309	4.58

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

## Hotel Price Index (HPI). 2008 Base

March 2016

Provisional data

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

	Index	Annual growth rate
<b>TOTAL</b>	<b>95.6</b>	<b>4.6</b>
Andalucía	94.6	9.4
Aragón	80.5	7.2
Asturias, Principado de	87.7	16.6
Balears, Illes	102.4	1.1
Canarias	115.5	7.1
Cantabria	91.2	7.6
Castilla y León	88.9	6.6
Castilla - La Mancha	86.2	3.2
Cataluña	86.3	-5.2
Comunitat Valenciana	94.2	9.5
Extremadura	90.2	8.2
Galicia	91.5	6.4
Madrid, Comunidad de	80.6	5.8
Murcia, Región de	77.0	3.6
Navarra, Comunidad Foral de	83.7	6.4
País Vasco	85.2	4.4
Rioja, La	87.8	8.9
Ceuta	78.1	-17.7
Melilla	98.0	2.4

### National General Index and breakdown by categories

	Index	Annual growth rate
<b>TOTAL</b>	<b>95.6</b>	<b>4.6</b>
<b>HOTELS: Gold stars</b>		
Five	89.9	2.8
Fourth	96.5	5.2
Three	95.3	4.2
Two	91.8	6.3
One	100.4	1.9
<b>HOSTALS: Silver stars</b>		
Three and two	94.6	4.9
One	99.3	1.8

## Indicators on the Profitability of the Hotel Sector

March 2016

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>75.5</b>	<b>2.0</b>	<b>45.1</b>	<b>9.2</b>
Andalucía	67.1	9.6	38.3	20.7
Aragón	60.8	7.1	25.8	26.6
Asturias, Principado de	56.0	22.0	21.5	32.0
Balears, Illes	66.7	10.0	42.6	21.8
Canarias	95.6	6.9	84.6	13.5
Cantabria	60.1	6.5	23.7	29.5
Castilla y León	56.3	9.2	21.4	24.0
Castilla - La Mancha	55.4	5.6	18.7	20.8
Cataluña	84.2	-15.2	48.7	-16.3
Comunitat Valenciana	57.3	11.0	34.7	21.8
Extremadura	59.6	8.2	21.5	25.1
Galicia	52.6	8.2	16.1	15.9
Madrid, Comunidad de	79.4	4.2	53.5	10.2
Murcia, Región de	54.4	8.7	29.8	22.6
Navarra, Comunidad Foral de	59.5	4.9	26.8	25.1
País Vasco	70.5	7.8	38.1	19.4
Rioja, La	64.2	8.4	32.7	22.2
Ceuta	66.1	-9.6	38.4	14.6
Melilla	66.0	0.4	42.5	3.8

### 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>75.5</b>	<b>2.0</b>	<b>45.1</b>	<b>9.2</b>
<b>HOTELS: Gold stars</b>				
Five	170.1	-2.2	110.6	1.7
Four	80.3	2.6	55.9	8.7
Three	56.9	2.5	35.4	7.6
Two	50.7	3.0	22.1	15.0
One	50.4	-2.8	19.0	11.3
<b>GUESTHOUSES: Silver stars</b>				
Three and two	45.6	1.5	15.9	18.4
One	37.2	4.6	11.4	14.4

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