

23 May 2014

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

22.1 million overnight stays in hotel establishments¹ were registered in April, that is, an increase of 15.9% in the annual rate

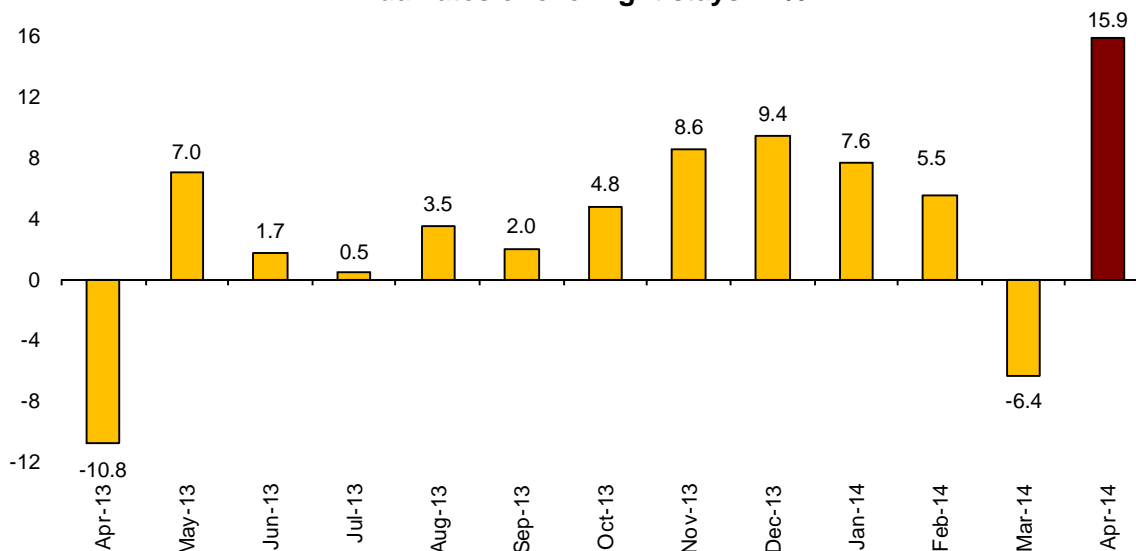
Hotels earn 38.2 euros per available room and invoice an average of 69.1 euros per occupied room

In April, a total of 22.1 million overnight stays were registered in hotel establishments, indicating an increase of 15.9% as compared with the same month of 2013. Overnight stays for residents in Spain increased 24.8% and those of non-residents did so by 10.5%. The average stay increased 0.3%, as compared with April 2013, standing at 3.1 nights per guest.

In the first four months of 2014, overnight stays increased 5.5% as compared with the same period of the previous year.

Worth noting the fact that, since Easter holidays took place in April this year, and in 2013 they took place in March, it is desirable to analyse the **aggregated period March-April**. An increase of 4.8% is observed within this period regarding overnight stays, as compared with the same two-month period of 2013. Overnight stays for residents increased by 2.8% during this period, and those of non-residents did so by 6.3%.

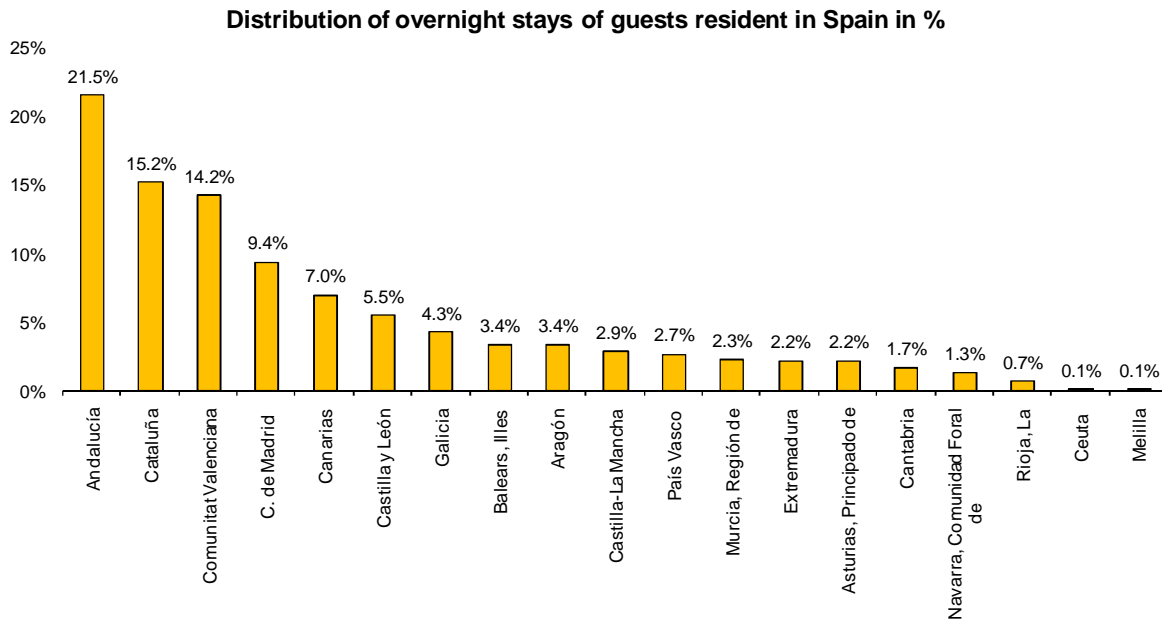
Annual rates of overnight stays in %



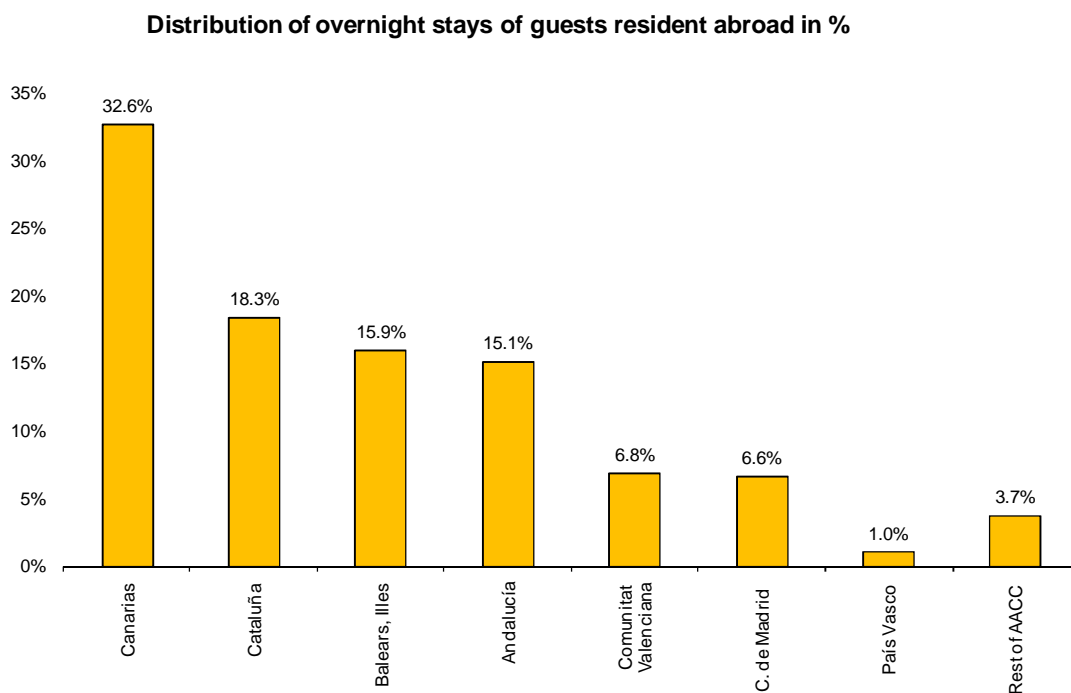
¹ Since in 2014 Easter holidays took place in April, and in 2013 they took place in March, it is desirable to analyse the data of both months together.

Main destinations¹

In April, 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 21.0%, 44.3%, 22.6% and 20.4%, respectively.



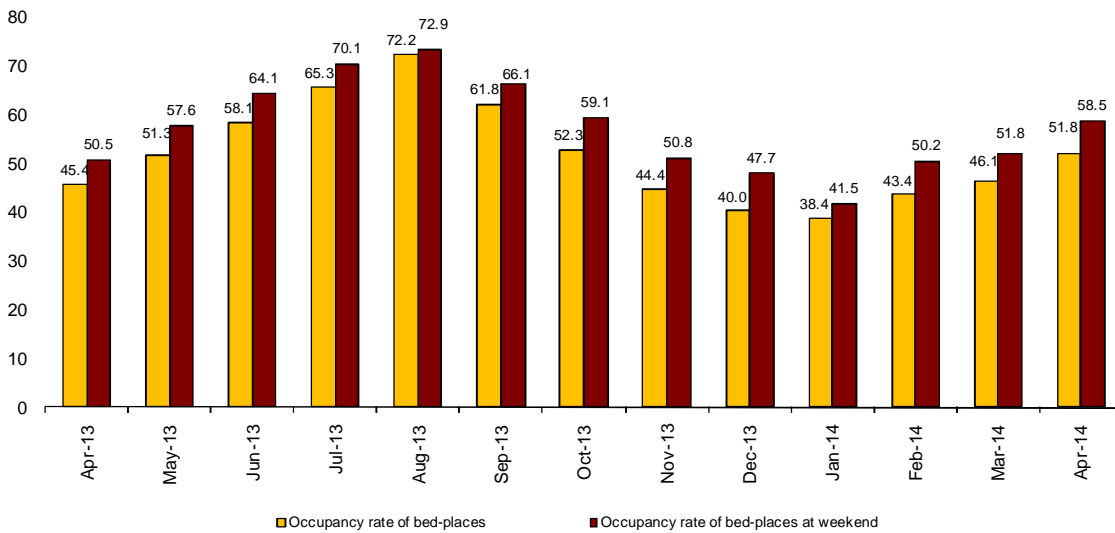
The main destination chosen by non-residents was Canarias, with 32.6% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 15.8%, as compared with April 2013. Canarias was followed by Cataluña (18.3% of the total) and Illes Balears (15.9%). The overnight stays of non-residents increased in these Autonomous Communities by 3.9% and 7.9%, respectively.



Hotel Occupancy¹

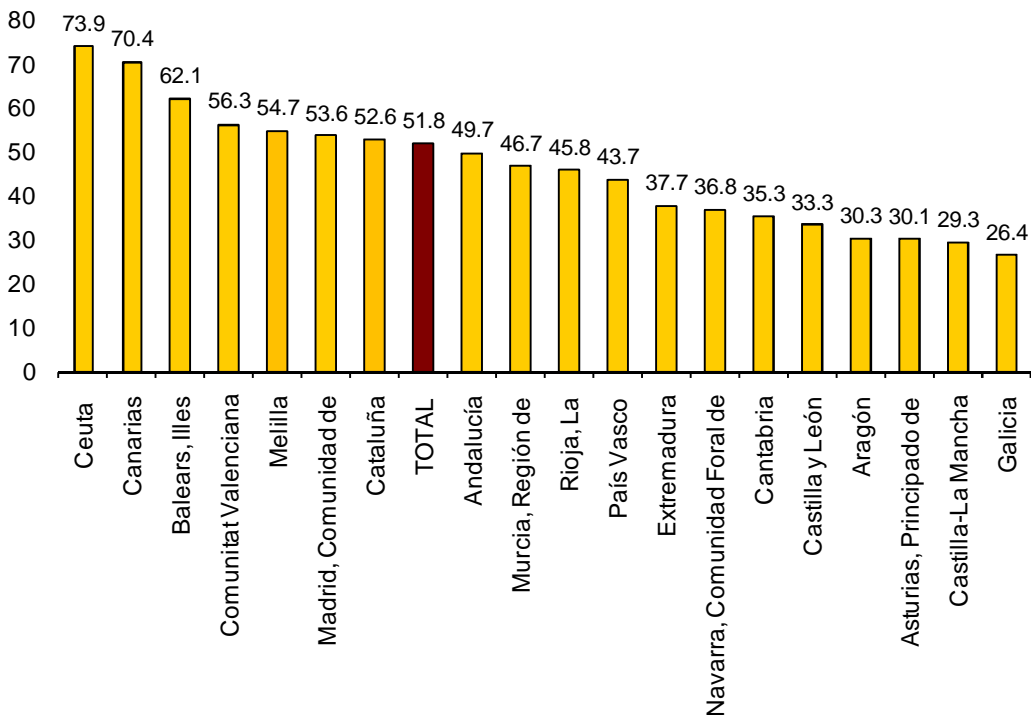
In terms of occupancy, 51.8% of the available bedplaces were occupied in April, with an annual increase of 14.1%. The weekend occupancy rate by bedplaces increased 15.9%, standing at 58.5%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in April (70.4%), followed by Illes Balears (62.1%) and Comunitat Valenciana (56.3%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, the island of Lanzarote registered in April both the highest occupancy rate by bedplaces (79.3%) and the highest weekend occupancy rate (77.7%). Mallorca recorded the highest number of overnight stays, with more than 2.2 million.

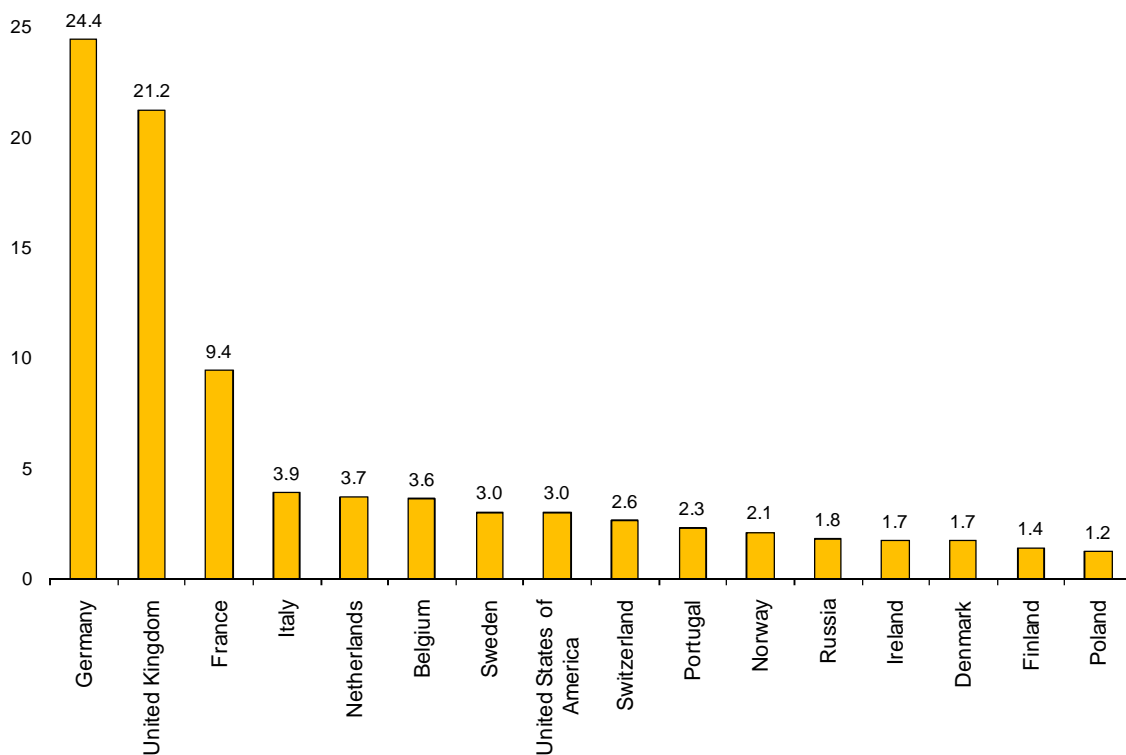
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Benidorm. Yaiza reached the highest occupancy rate by bedplaces (86.5%) and Benidorm the highest weekend occupancy rate (86.6%).

Overnight stays according to the country of origin of the guests¹

Guests from Germany and the United Kingdom concentrated 24.4% and 21.2%, respectively, of the total of overnight stays in hotel establishments by non-residents in April. The German market experienced an increase of 16.5% and the British market did so by 2.3%.

Overnight stays of guests from France, Italy and The Netherlands (the following countries of origin) registered annual rates of -5.7%, 9.2% and 0.3%, respectively.

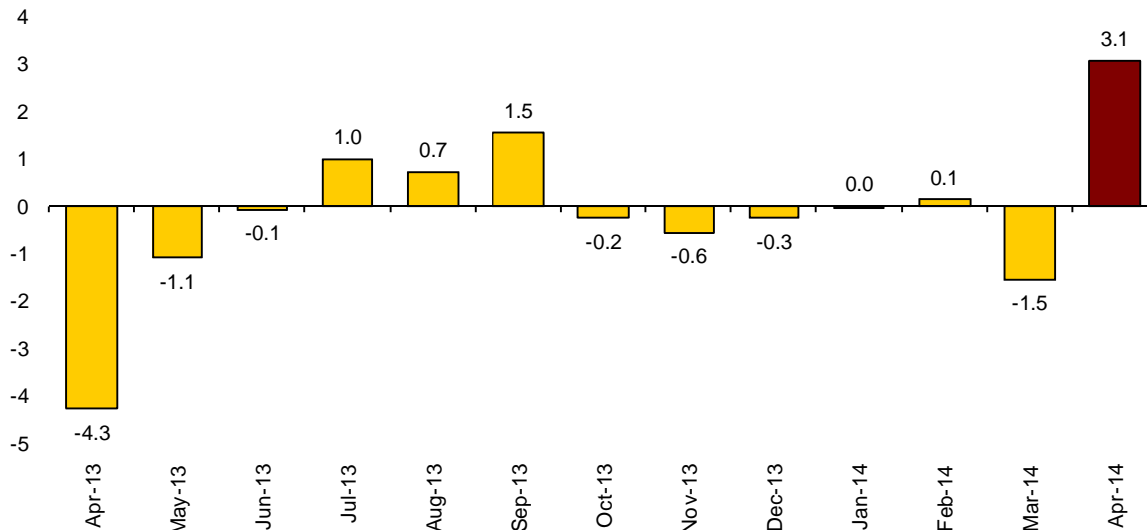
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices¹

The annual rate of the Hotel Prices Index (HPI) stood at 3.1% in April, that is, 4.6 points higher than in the previous month and 7.3 points lower than 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 April (together they represented 69.1% of the total weight). Hotel prices increased 7.8% in the annual rate in Canarias, 4.3% in Andalucía and 0.1% in Cataluña. In turn, the prices decreased in Comunidad de Madrid by 1.8%.

By hotel category, the increases in hotel prices were registered in three and two-silver-star hotels (5.2%), five-golden-star hotels (3.9%), three-golden-star hotel (3.2%), four golden-star hotels (3.0%) and two-golden star hotels (1.4%).

In turn, the prices of one-silver-star establishments remained the same and it decreased by 1.0% in one-golden-star hotels.

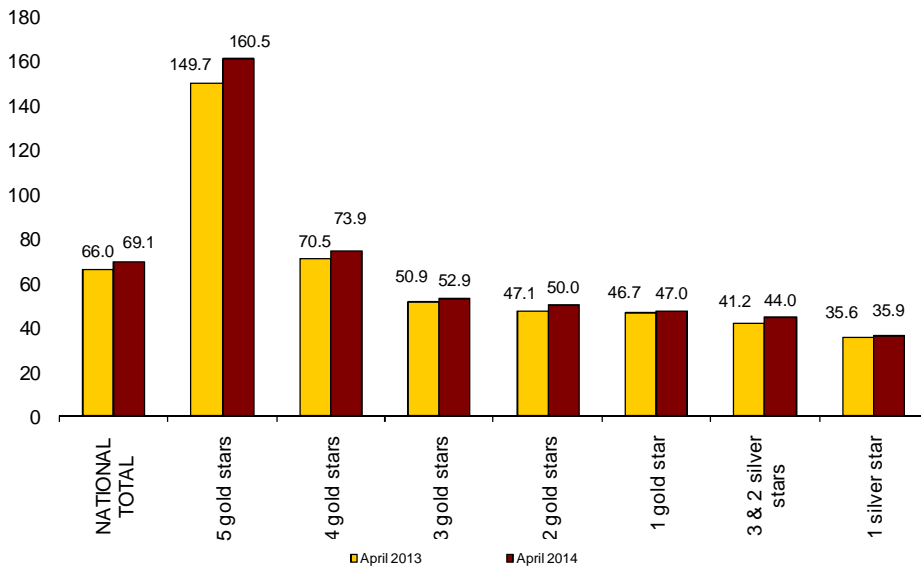
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in April was 69.1 euros, which represented an increase of 4.6% as compared with the same month of 2013.

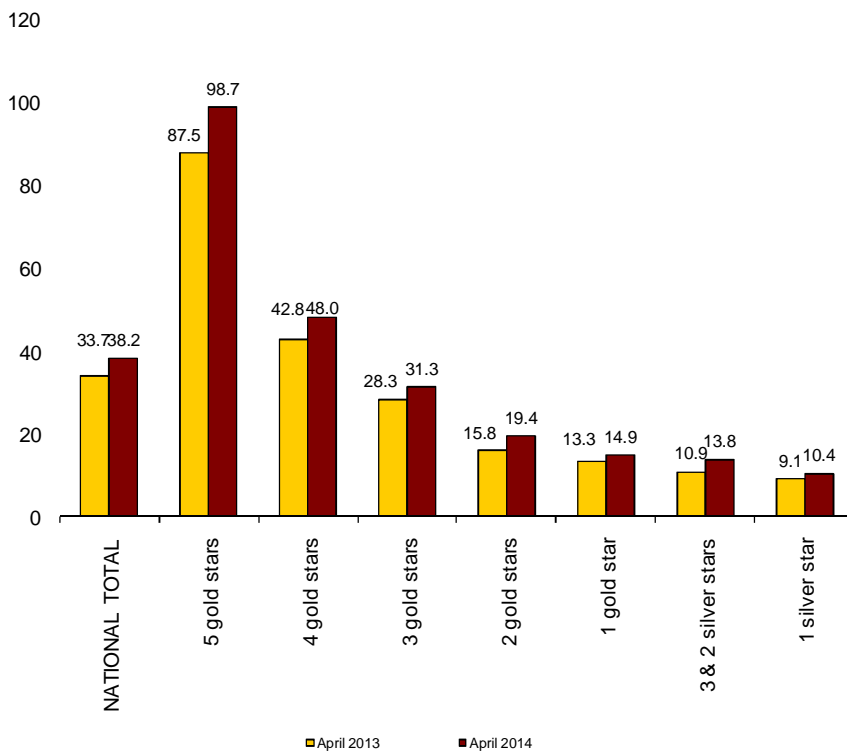
In turn, the daily average revenue per available room (RevPAR), that is conditioned by the occupancy registered in hotel establishments, reached 38.2 euros, with an increase of 13.4%.

By category, the average invoicing was 160.5 euros for five-star hotels, 73.9 euros for four-star hotels and 52.9 euros for three-star hotels. Income per available room for the same categories was 98.7, 48.0 and 31.1 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)

April 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	
TOTAL	7,256,172	3,815,773	3,440,399	22,172,306	8,949,776	13,222,530	3.06
HOTELS: Golden stars							
Five	406,224	127,692	278,533	1,371,271	269,709	1,101,562	3.38
Four	3,502,352	1,691,421	1,810,931	11,528,914	3,983,748	7,545,166	3.29
Three	1,974,823	1,114,846	859,976	6,355,298	2,925,632	3,429,666	3.22
Two	518,598	346,481	172,117	1,111,119	691,087	420,032	2.14
One	194,005	129,425	64,580	398,546	247,490	151,055	2.05
INNS: Silver stars							
Two and three	365,647	245,226	120,421	737,354	461,935	275,419	2.02
One	294,522	160,682	133,840	669,804	370,173	299,631	2.27
Annual rate	15.49	22.77	8.35	15.87	24.78	10.52	0.33
Cumulative annual rate	5.07	4.51	5.77	5.50	2.43	7.55	0.41

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	
TOTAL	14,926	1,403,086	51.84	58.49	55.44	174,052
HOTELS: Golden stars						
Five	255	78,248	57.53	63.97	61.72	23,753
Four	2,104	631,663	59.73	65.62	64.88	86,547
Three	2,459	372,104	56.02	62.90	59.43	39,951
Two	1,926	104,924	35.01	45.22	38.52	8,302
One	1,181	46,132	28.58	35.61	32.55	3,606
INNS: Silver stars						
Two and three	3,059	87,372	28.02	36.14	31.18	6,203
One	3,943	82,644	26.91	32.17	30.28	5,690
Annual rate	0.66	0.98	14.09	15.86	8.62	3.32

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		

Tourist area with a greater occupancy rate per month

Isla de Lanzarote	28,341	91,324	129,406	704,315	79.32	76.11	81.60	6.97	5,139
Sur de Tenerife	35,989	183,420	153,508	1,376,464	75.25	77.55	78.87	6.97	12,446
Isla de Tenerife	65,128	215,589	281,134	1,612,773	71.65	74.26	74.26	6.75	15,647
Isla de Fuerteventura	8,634	100,212	35,988	875,134	70.13	71.97	74.19	8.37	6,648
Sur de Gran Canaria	28,098	122,508	122,422	995,357	68.90	71.64	73.33	7.42	9,416
Barcelona	117,548	481,402	243,827	1,370,060	68.20	74.14	74.84	2.69	12,330
Isla de Gran Canaria	44,143	135,453	160,656	1,049,641	66.41	69.07	71.43	6.74	10,352
Costa Blanca	191,567	132,731	719,084	605,438	65.98	77.66	67.87	4.08	7,938

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

Isla de Mallorca	56,926	351,975	239,052	2,032,919	62.67	64.17	67.75	5.56	15,327
Costa del Sol	156,825	261,374	469,921	1,017,362	60.85	66.32	64.99	3.56	10,367
Palma - Calvià	33,753	184,562	143,110	990,930	62.62	65.43	68.92	5.19	7,851
Costa Brava	115,599	134,075	330,430	471,957	48.71	56.09	51.37	3.21	5,359
Costa Daurada	132,027	56,294	373,869	159,480	45.20	51.36	49.11	2.83	2,998
Costa de la Luz de Cádiz	85,718	45,193	198,884	193,726	35.80	39.23	38.66	3.00	3,756
Costa de Almería	66,030	17,010	260,534	67,214	42.89	49.21	53.95	3.95	2,059
Costa de la Luz de Huelva	48,309	11,148	203,303	49,223	42.31	47.55	51.19	4.25	1,743

Tourist site with a greater occupancy rate per month

Yaiza	13,596	52,641	65,233	371,179	86.53	83.16	86.66	6.59	2,673
Arona	12,282	55,509	47,952	418,668	80.43	79.83	84.17	6.88	3,222
Teguise	5,906	17,456	28,382	151,232	76.79	75.63	83.27	7.69	1,045
Benidorm	105,321	71,496	506,438	403,759	75.58	86.61	76.35	5.15	4,837
Adeje	13,605	97,674	68,129	746,791	75.34	76.97	78.26	7.32	6,731
Tías	5,649	21,408	27,141	182,356	73.75	64.68	73.41	7.74	1,303
Mogán	4,453	35,303	16,423	278,377	73.62	79.37	83.58	7.42	2,001
Sevilla	100,799	116,654	185,098	251,381	72.87	75.30	75.91	2.01	3,029
Córdoba	45,574	53,118	76,863	73,095	72.44	81.18	76.01	1.52	871
Torremolinos	34,579	53,813	143,986	245,516	71.87	71.67	70.16	4.41	2,103

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

Barcelona	107,192	461,124	221,014	1,322,718	69.33	75.66	76.03	2.72	11,923
Madrid	348,116	347,818	637,938	804,620	58.39	68.35	67.71	2.07	11,478
San Bartolomé de Tirajana	23,887	87,102	106,944	716,432	67.59	69.40	70.51	7.42	7,408
Palma	23,859	106,087	109,032	527,420	68.13	69.68	72.59	4.90	4,447
Pájara	3,380	61,632	16,579	571,665	71.71	73.20	73.99	9.05	4,290
Lloret de Mar	42,778	59,516	189,888	262,887	61.81	64.55	62.17	4.43	1,800
Calvià	6,378	68,541	19,361	408,078	52.57	57.67	61.57	5.71	2,986
Salou	67,003	29,072	260,894	84,442	62.68	58.93	57.67	3.59	1,370
Granada	75,412	84,454	149,465	148,620	68.97	81.61	74.49	1.86	1,573
Puerto de La Cruz	17,068	21,469	100,251	197,177	67.62	70.63	64.48	7.72	2,391

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

8. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	7,256,172	100.00	22,172,306	100.00
Residents in Spain	3,815,773	52.59	8,949,776	40.36
Residents abroad	3,440,399	47.41	13,222,530	59.64
Total Residents abroad	3,440,399	100.00	13,222,530	100.00
Total Residents in E.U. (without Spain)	2,486,560	72.28	10,680,766	80.78
- Germany	573,148	16.66	3,230,693	24.43
- Austria	43,285	1.26	152,927	1.16
- Belgium	105,174	3.06	470,726	3.56
- Denmark	46,677	1.36	219,196	1.66
- Finland	39,128	1.14	178,123	1.35
- France	423,914	12.32	1,248,406	9.44
- Greece	7,258	0.21	18,656	0.14
- Ireland	57,971	1.69	224,790	1.70
- Italy	188,300	5.47	516,903	3.91
- Luxembourg	7,009	0.20	32,874	0.25
- Netherlands	126,290	3.67	487,517	3.69
- Poland	37,744	1.10	154,190	1.17
- Portugal	112,905	3.28	297,242	2.25
- United Kingdom	566,875	16.48	2,808,623	21.24
- Czech Republic	10,811	0.31	34,447	0.26
- Sweden	77,688	2.26	396,754	3.00
- Other EU countries*	62,382	1.81	208,699	1.58
Norway	53,767	1.56	275,729	2.09
Russia	67,744	1.97	239,930	1.81
Switzerland	84,467	2.46	344,058	2.60
Rest of Europe	72,128	2.10	215,008	1.63
Japan	48,439	1.41	78,630	0.59
United States of America	172,310	5.01	392,986	2.97
Rest of America	187,731	5.46	433,341	3.28
Africa	40,860	1.19	90,642	0.69
Other countries	226,393	6.58	471,441	3.57

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

Hotel Price Index (HPI). 2008 Base

April 2014

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	90.8	3.1
Andalucía	89.2	4.3
Aragón	73.8	7.5
Asturias, Principado de	85.9	2.7
Balears, Illes	99.1	2.2
Canarias	107.5	7.8
Cantabria	88.5	4.1
Castilla y León	88.0	2.7
Castilla - La Mancha	86.2	0.8
Cataluña	86.8	0.1
Comunitat Valenciana	91.9	5.5
Extremadura	83.0	0.5
Galicia	88.1	-0.7
Madrid, Comunidad de	75.3	-1.8
Murcia, Región de	77.1	-0.9
Navarra, Comunidad Foral de	82.1	0.2
País Vasco	87.5	0.2
Rioja, La	86.8	5.4
Ceuta	96.7	2.2
Melilla	97.0	2.0

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	90.8	3.1
HOTELS: Gold stars		
Five	87.3	3.9
Fourth	90.5	3.0
Three	91.7	3.2
Two	89.9	1.4
One	93.5	-1.0
HOSTALS: Silver stars		
Three and two	90.7	5.2
One	96.5	0.0

Indicators on the Profitability of the Hotel Sector

April 2014

Provisional data

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	69.1	4.6	38.2	13.4
Andalucía	66.2	7.4	36.3	16.3
Aragón	53.7	11.0	16.9	38.9
Asturias, Principado de	53.1	5.0	17.9	39.0
Balears, Illes	61.1	4.1	40.5	6.6
Canarias	84.5	8.5	62.3	17.5
Cantabria	54.3	3.1	19.3	25.1
Castilla y León	53.6	5.4	19.0	23.0
Castilla - La Mancha	56.7	7.0	17.9	27.1
Cataluña	76.5	1.0	43.3	6.0
Comunitat Valenciana	55.2	8.4	32.3	18.8
Extremadura	55.5	4.0	21.6	20.4
Galicia	50.0	2.3	14.6	13.1
Madrid, Comunidad de	74.0	-3.1	46.3	5.1
Murcia, Región de	50.1	1.3	23.8	7.6
Navarra, Comunidad Foral de	58.9	0.8	25.3	22.1
País Vasco	69.8	4.1	35.2	5.8
Rioja, La	62.8	6.1	33.9	37.7
Ceuta	70.9	10.8	41.4	39.0
Melilla	62.9	-4.4	39.6	12.2

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	69.1	4.6	38.2	13.4
HOTELS: Gold stars				
Five	160.5	7.3	98.7	12.8
Four	73.9	4.8	48.0	12.1
Three	52.9	3.8	31.3	10.6
Two	50.0	6.0	19.4	22.7
One	47.0	0.7	14.9	12.0
GUESTHOUSES: Silver stars				
Three and two	44.0	6.8	13.8	26.8
One	35.9	0.8	10.4	14.4

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