

22 November 2013

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

**Overnight stays in hotel establishments increase 4.8% in October,
as compared with the same month of 2012**

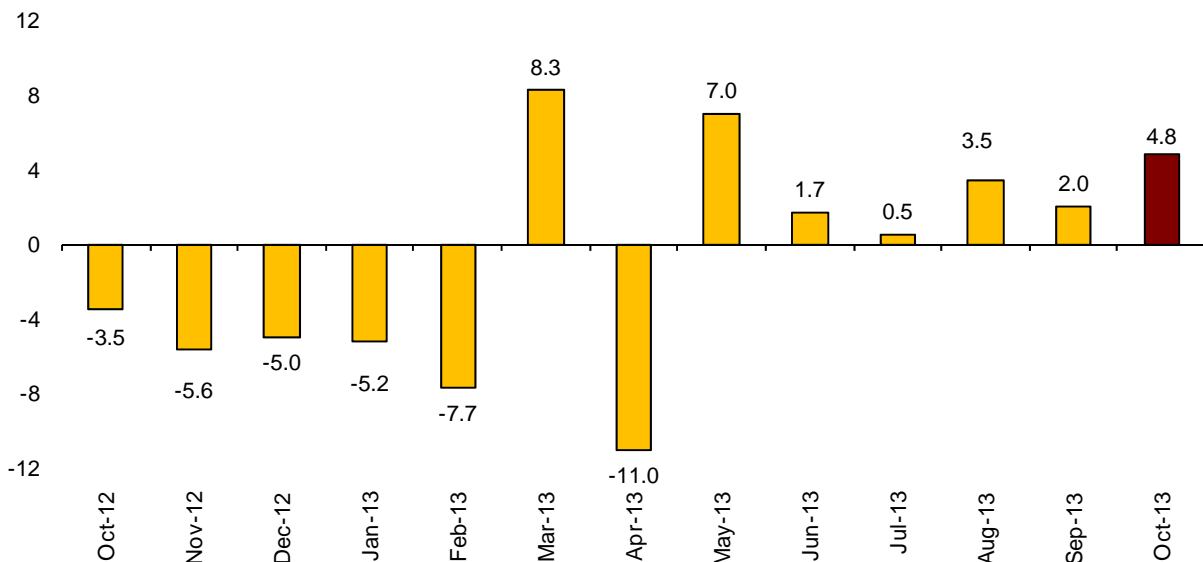
**Hotels earn 39.0 euros per available room and invoice an average of
68.1 euros per occupied room**

During the month of October, 25.0 million overnight stays were recorded in hotel establishments. This figure was 4.8% higher than that registered during the same month of 2012. Overnight stays for residents in Spain increased 0.1% and that of non-residents did so by 7.0%.

The average stay increased 1.8%, as compared with October 2012, standing at 3.4 nights per guest.

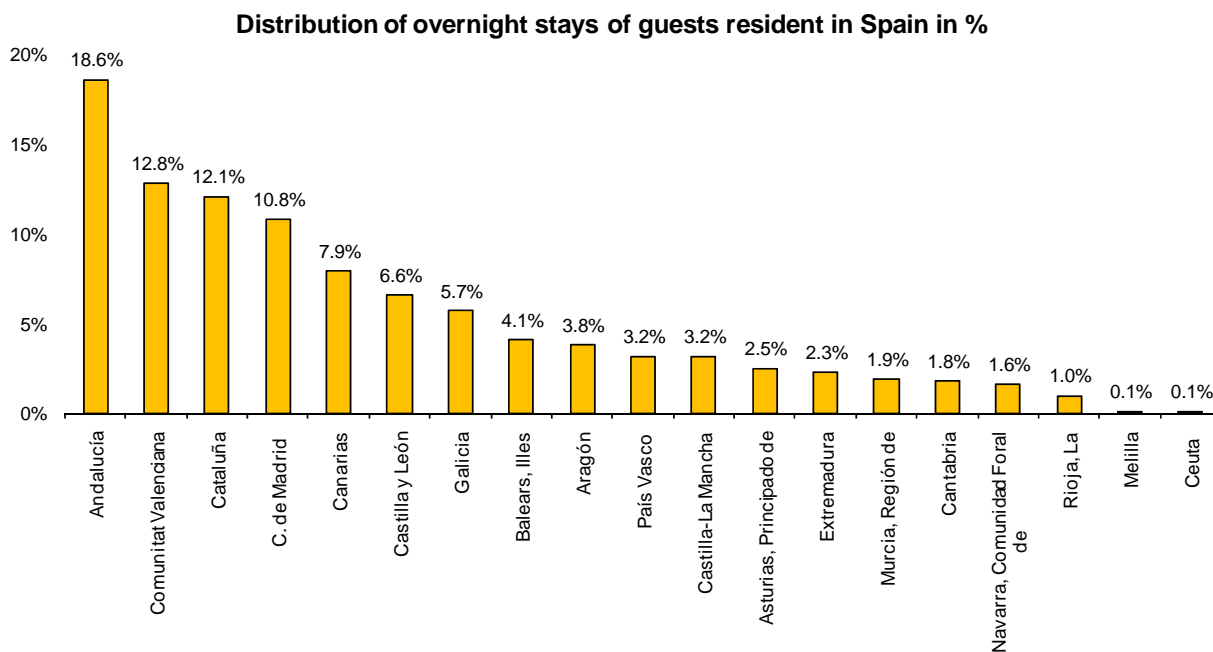
During the first ten months of 2013, overnight stays increased 1.2%, as compared with the same period of the previous year.

Interannual rates of overnight stays in %

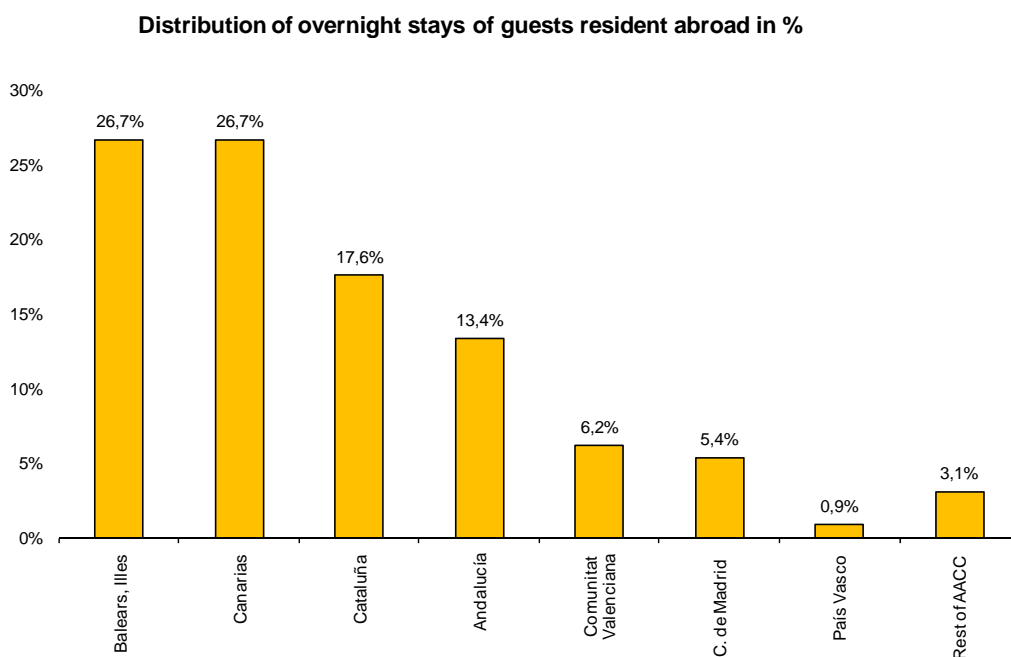


Main destinations

In October, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with interannual rates for overnight stays of 6.8%, 5.7%, -7.3% and -2.7%, respectively.



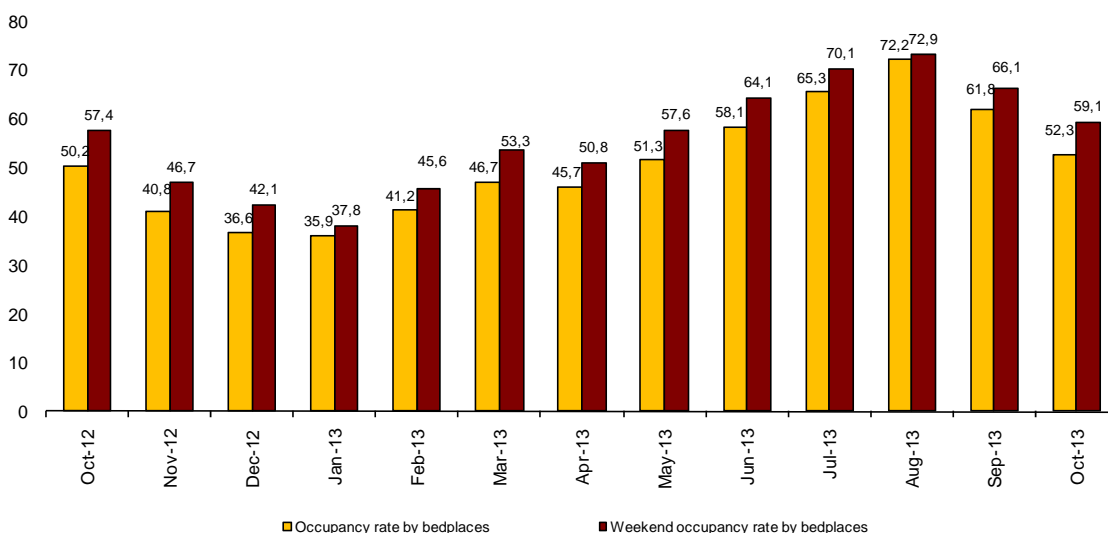
The main destination chosen by non-residents was Illes Balears, with a 26.7% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 3.2%, as compared with the same month of 2012. Followed by Canarias, (with a 26.7% of the total), and Cataluña (17.6%), where overnight stays increased 7.2% and 10.7%, respectively.



Hotel Occupancy

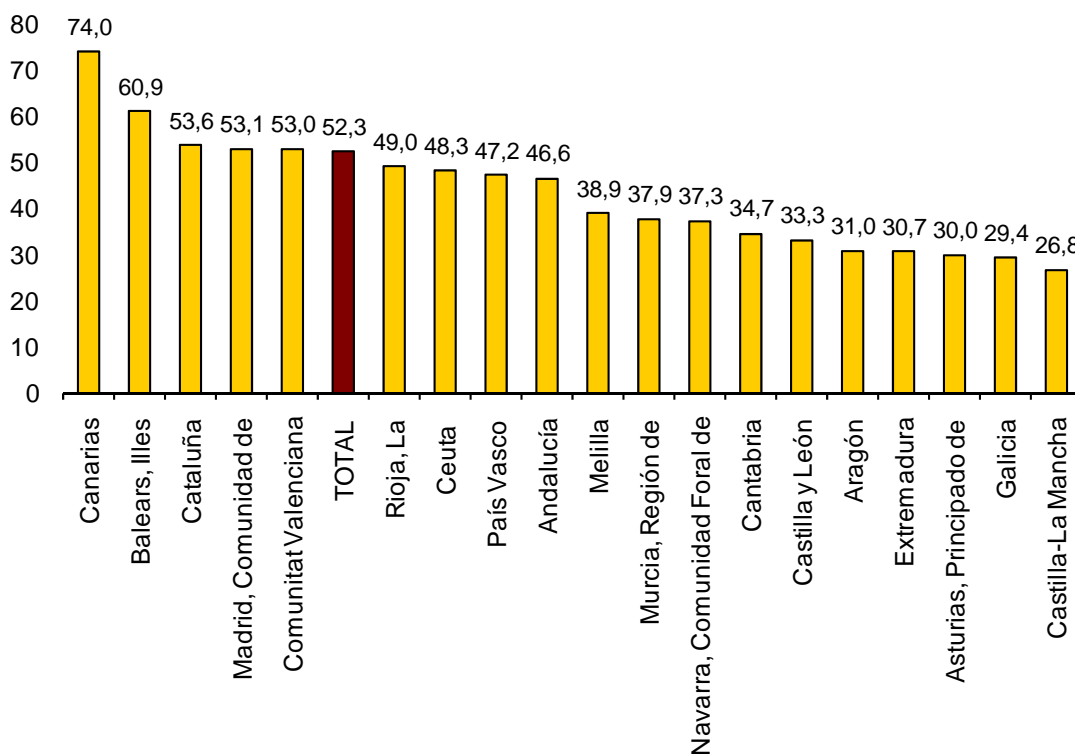
In terms of occupancy, 52.3% of the available bedplaces were occupied in October, with a 4.2% increase. The weekend occupancy rate by bedplaces increased 3.0% and stood at 59.1%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in October (74.0%), followed by Illes Balears (60.9%) and Cataluña (53.6%).

Occupancy rate by bedplaces by Autonomus Community



By tourist areas, the South of Tenerife registered both the highest occupancy rate by bedplaces (80.6%) and the highest weekend occupancy rate by bedplaces (79.1%). In addition, the island of Mallorca, registered the highest number of overnight stays, with more than 4.1 million.

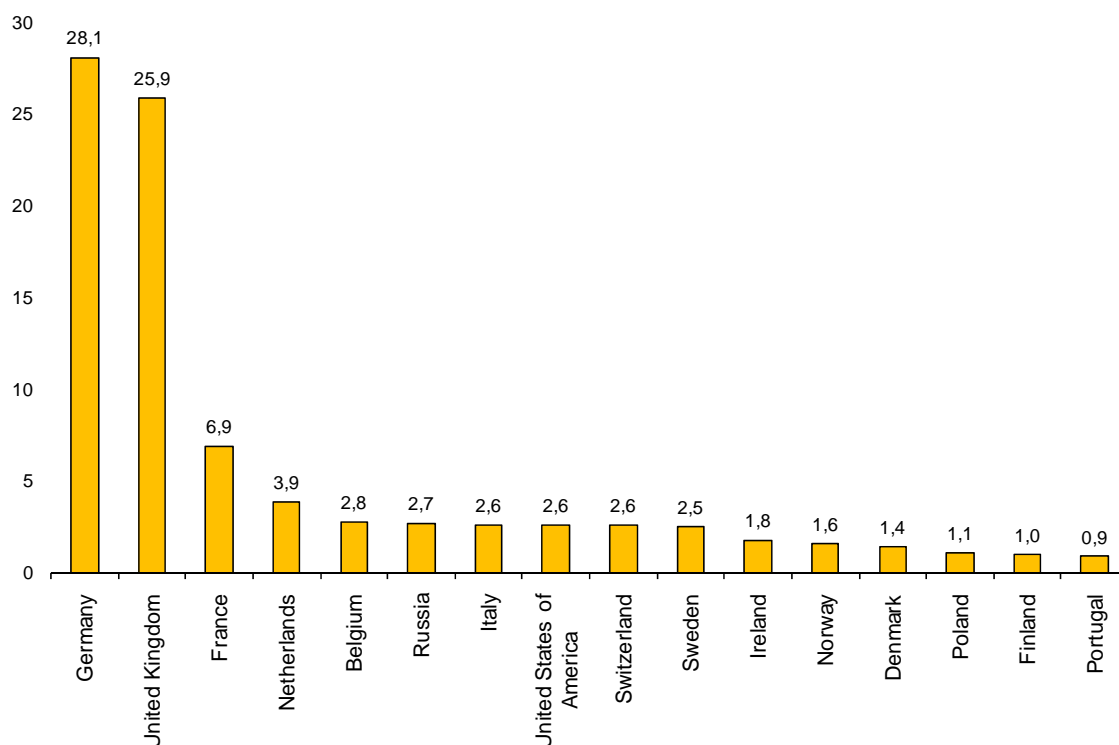
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Benidorm. Arona reached both the highest occupancy rate by bedplaces and the highest weekend occupancy, both with 84.7%.

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom registered 28.1% and 25.9%, respectively, of the total of overnight stays by non-residents in October. The German market experienced a 4.2% annual increase, while the British market increased 1.4%.

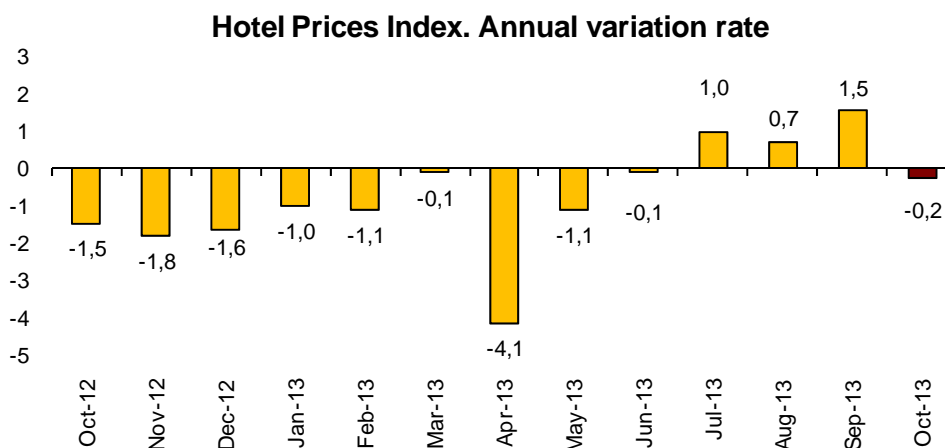
Overnight stays of guests from France, Netherlands and Belgium (the following countries of origin) registered annual rates of 28.7%, 4.9% and 13.6%, respectively.

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 -0.2% in October, that is, 1.7 points less than that of the previous month, and 1.2 points more than that registered the previous year.



Cataluña, Canarias, Illes Balears and Andalucía were the Autonomous Communities that carried the greatest weight of total load of the HPI in the month of October (together they represent 67.7% of the total weight). Hotel prices increased 0.8% in the annual rate in Cataluña, 3.5% in Canarias and 3.7% in Illes Balears. In turn, they decreased 1.9% in Andalucía.

By hotel category, the decreases in hotel prices were registered in three and two-silver-star hotels (-3.5%), in one-silver-star hotels (-2.8%), in five-golden stars hotels (-0.6%), in four-golden-star hotels (-0.3%) and in two-golden-star hotels (-0.1%).

The remaining categories registered positive annual rates: one-golden-star establishments (1.2%) and three-golden-star establishment (0.5%).

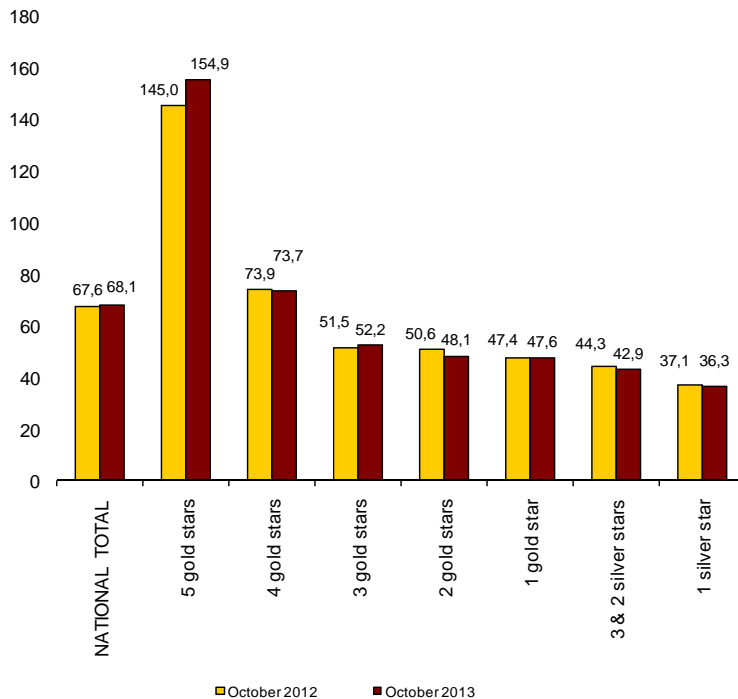
Indicators on the Profitability of the Hotel Sector

The average invoicing per occupied room (ADR) in October was 68.1 euros, a 0.7% increase, as compared with the same month in 2012.

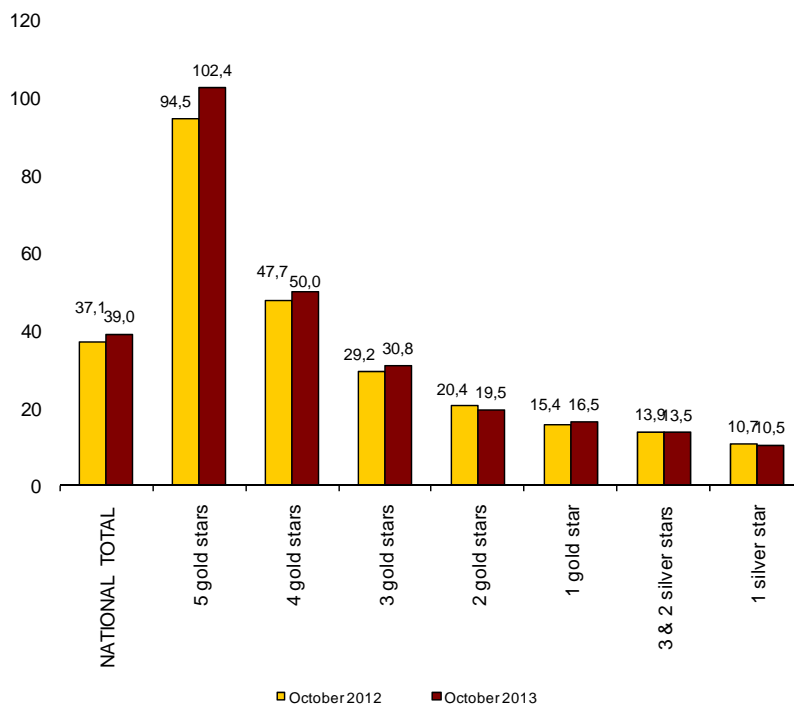
In turn, the average daily income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 39.0 euros, with a 5.2% increase as compared with September 2012.

By category, the average invoicing was 154.9 euros for five-star hotels, 73.7 euros for four-star hotels and 52.2 euros for three-star hotels. Income per available room for the same categories was 102.4, 50.0 and 30.8 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)

October 2013

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	7,474,296	3,525,006	3,949,290	25,057,150	7,589,594	17,467,557	3.35
HOTELS: Golden stars							
Five	435,331	133,136	302,195	1,496,908	277,540	1,219,368	3.44
Four	3,548,439	1,558,064	1,990,376	12,511,543	3,263,240	9,248,303	3.53
Three	2,101,895	997,685	1,104,211	7,817,197	2,362,493	5,454,704	3.72
Two	536,357	336,005	200,352	1,269,775	666,901	602,874	2.37
One	203,525	125,344	78,180	449,900	236,586	213,314	2.21
INNS: Silver stars							
Two and three	353,843	223,926	129,917	798,161	434,537	363,624	2.26
One	294,905	150,846	144,059	713,667	348,297	365,370	2.42
Annual rate	2.97	-0.74	6.53	4.80	0.10	6.98	1.77
Cumulative annual rate	0.28	-2.38	3.05	1.17	-2.97	3.49	0.88

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	15,063	1,525,128	52.34	59.09	57.40	191,946
HOTELS: Golden stars						
Five	263	81,803	58.33	64.29	66.26	24,205
Four	2,168	662,962	59.97	67.15	68.04	92,908
Three	2,605	442,782	56.26	62.10	59.10	48,327
Two	1,870	112,263	36.35	45.55	41.18	9,464
One	1,135	46,481	30.99	37.92	35.46	3,809
INNS: Silver stars						
Two and three	3,045	92,670	27.69	34.81	31.69	7,234
One	3,977	86,167	26.65	31.89	30.42	5,998
Annual rate	-1.74	0.59	4.22	3.02	4.41	-0.51

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

Sur de Tenerife	25,941	191,994	127,889	1,551,164	80.62	79.09	85.21	7.70	12,312
Isla de Lanzarote	16,644	86,571	93,497	714,809	76.74	75.66	83.94	7.83	5,242
Sur de Gran Canaria	24,534	135,961	130,635	1,133,791	76.44	78.92	83.70	7.88	9,498
Isla de Tenerife	59,304	224,734	253,666	1,785,418	75.53	75.20	79.75	7.18	15,433
Isla de Fuerteventura	9,525	105,564	42,328	927,176	75.07	75.77	80.08	8.42	6,665
Isla de Gran Canaria	46,402	146,790	188,218	1,172,369	73.02	76.23	80.75	7.04	10,452
Barcelona	122,207	568,264	224,478	1,461,480	70.80	77.45	83.91	2.44	12,481
Isla de Mallorca	71,366	546,674	228,302	3,912,562	64.22	65.79	63.61	6.70	25,350

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

Palma - Calvià	36,711	246,311	106,045	1,428,556	63.14	67.65	66.88	5.42	10,090
Costa del Sol	110,877	248,017	289,885	1,236,627	60.48	65.24	67.62	4.25	10,596
Costa Blanca	136,419	145,499	541,510	780,091	63.03	68.35	66.23	4.69	8,118
Costa Brava	76,726	153,019	154,697	606,121	46.23	55.76	51.65	3.31	5,425
Islas de Ibiza-Formentera	16,143	80,286	59,884	558,325	53.52	57.54	54.54	6.41	4,179
Costa Daurada	92,146	69,673	213,012	370,771	49.58	60.01	51.67	3.61	3,501
Costa de la Luz de Cádiz	76,770	60,649	176,009	309,215	41.34	49.05	51.35	3.53	4,365
Costa de Almería	47,788	18,004	135,162	96,908	30.93	36.92	44.10	3.53	1,787

Tourist site with a greater occupancy rate per month

Arona	6,138	57,132	35,287	476,266	84.74	84.70	89.92	8.09	3,131
Adeje	10,472	102,580	58,134	835,561	81.40	80.05	86.96	7.91	6,775
Yaiza	6,939	42,499	41,385	345,362	79.52	78.47	86.56	7.82	2,705
Benidorm	70,729	88,881	416,554	584,186	78.80	83.29	80.38	6.27	5,156
Pájara	3,628	70,738	21,629	644,296	77.57	78.84	81.74	8.95	4,544
Tías	3,882	24,919	23,137	207,915	77.39	75.01	84.94	8.02	1,424
Mogán	3,418	36,146	15,612	300,582	76.44	81.89	85.54	7.99	1,979
San Bartolomé de Tirajana	21,069	100,006	114,993	833,548	76.43	77.96	83.17	7.83	7,515
Teguise	4,140	17,568	22,540	158,103	74.90	74.37	82.21	8.32	1,013
Torremolinos	24,434	58,214	91,435	345,481	74.72	77.66	78.53	5.29	2,290

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

Barcelona	113,711	548,100	208,131	1,413,061	72.09	78.31	84.42	2.45	12,052
Madrid	359,228	388,449	626,374	874,436	58.47	69.51	71.73	2.01	11,725
Palma	30,890	138,936	83,878	670,553	66.61	72.95	71.23	4.44	5,371
Calvià	5,296	96,899	16,976	688,672	57.68	61.29	61.69	6.90	4,368
Sant Llorenç des Cardassar	2,215	41,262	4,765	391,791	62.24	65.30	67.71	9.12	2,369
Lloret de Mar	18,090	64,673	51,218	341,394	60.46	66.75	65.48	4.74	1,699
Sevilla	85,732	109,140	147,155	229,897	61.27	71.55	68.79	1.93	2,998
Salou	34,174	38,435	101,085	251,496	61.08	73.69	63.21	4.86	1,688
Muro	2,637	34,742	6,792	305,047	66.62	60.88	59.41	8.34	1,931
Puerto de La Cruz	21,040	23,893	98,944	202,794	67.29	70.52	68.76	6.72	2,362

* 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	7,474,296	100.00	25,057,150	100.00
Residents in Spain	3,525,006	47.16	7,589,594	30.29
Residents abroad	3,949,290	52.84	17,467,557	69.71
Total Residents abroad	3,949,290	100.00	17,467,557	100.00
Total Residents in E.U. (without Spain)	2,826,964	71.58	14,293,679	81.83
- Germany	742,956	18.81	4,910,761	28.11
- Austria	32,490	0.82	137,992	0.79
- Belgium	95,365	2.41	492,585	2.82
- Denmark	52,407	1.33	241,532	1.38
- Finland	37,170	0.94	175,818	1.01
- France	418,983	10.61	1,201,329	6.88
- Greece	11,305	0.29	35,960	0.21
- Ireland	65,270	1.65	307,615	1.76
- Italy	159,153	4.03	458,668	2.63
- Luxembourg	6,519	0.17	32,564	0.19
- Netherlands	148,334	3.76	686,313	3.93
- Poland	42,689	1.08	194,758	1.11
- Portugal	73,390	1.86	156,198	0.89
- United Kingdom	770,334	19.51	4,526,080	25.91
- Czech Republic	16,897	0.43	74,355	0.43
- Sweden	87,478	2.22	427,548	2.45
- Other EU countries*	66,224	1.68	233,603	1.34
Norway	59,304	1.50	281,916	1.61
Russia	90,072	2.28	465,428	2.66
Switzerland	96,982	2.46	448,655	2.57
Rest of Europe	80,349	2.03	249,946	1.43
Japan	64,978	1.65	105,357	0.60
United States of America	206,935	5.24	456,068	2.61
Rest of America	232,975	5.90	532,039	3.05
Africa	41,236	1.04	91,498	0.52
Other countries	249,495	6.32	542,970	3.11

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

Hotel Price Index (HPI). 2008 Base

October 2013

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	90.1	-0.2
Andalucía	86.8	-1.9
Aragón	76.5	-2.2
Asturias, Principado de	84.6	-2.2
Balears, Illes	97.1	3.7
Canarias	99.8	3.5
Cantabria	86.7	-4.6
Castilla y León	84.9	-3.9
Castilla - La Mancha	84.3	-4.9
Cataluña	92.5	0.8
Comunitat Valenciana	85.6	-3.1
Extremadura	85.5	-3.8
Galicia	87.5	-3.2
Madrid, Comunidad de	76.8	-6.6
Murcia, Región de	76.3	-1.6
Navarra, Comunidad Foral de	82.9	-4.1
País Vasco	94.0	0.3
Rioja, La	87.9	-2.7
Ceuta	91.2	-5.8
Melilla	95.4	-3.7

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	90.1	-0.2
HOTELS: Gold stars		
Five	84.3	-0.6
Fourth	89.9	-0.3
Three	91.1	0.5
Two	93.8	-0.1
One	97.9	1.2
HOSTALS: Silver stars		
Three and two	89.5	-3.5
One	92.7	-2.8

Indicators on the Profitability of the Hotel Sector

October 2013

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	68.1	0.7	39.0	5.2
Andalucía	64.0	-2.5	35.2	5.9
Aragón	51.8	-3.9	18.2	-8.3
Asturias, Principado de	55.4	-0.6	18.9	3.5
Balears, Illes	60.0	3.1	36.0	7.6
Canarias	78.9	7.8	63.1	17.4
Cantabria	57.2	-0.5	21.2	-3.7
Castilla y León	52.9	-2.3	19.8	-0.6
Castilla - La Mancha	52.8	-5.0	16.5	-3.2
Cataluña	79.6	1.1	48.6	4.7
Comunitat Valenciana	55.3	-2.8	31.2	2.9
Extremadura	53.1	-3.7	18.4	-5.3
Galicia	50.5	-3.5	17.0	-5.9
Madrid, Comunidad de	78.1	-6.8	50.8	-10.9
Murcia, Región de	55.0	0.7	23.9	16.6
Navarra, Comunidad Foral de	59.8	-6.0	26.8	-1.7
País Vasco	76.4	3.9	44.0	-1.4
Rioja, La	62.8	-0.5	35.6	8.6
Ceuta	68.3	-4.1	31.7	7.2
Melilla	59.4	-7.3	32.3	-8.1

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	68.1	0.7	39.0	5.2
HOTELS: Gold stars				
Five	154.9	6.8	102.4	8.4
Four	73.7	-0.3	50.0	4.9
Three	52.2	1.4	30.8	5.4
Two	48.1	-4.8	19.5	-4.2
One	47.6	0.4	16.5	6.9
GUESTHOUSES: Silver stars				
Three and two	42.9	-3.0	13.5	-2.3
One	36.3	-2.2	10.5	-2.0

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room