

23 December 2013

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

Overnight stays in hotel establishments increase 8.6% in November, as compared with the same month of 2012

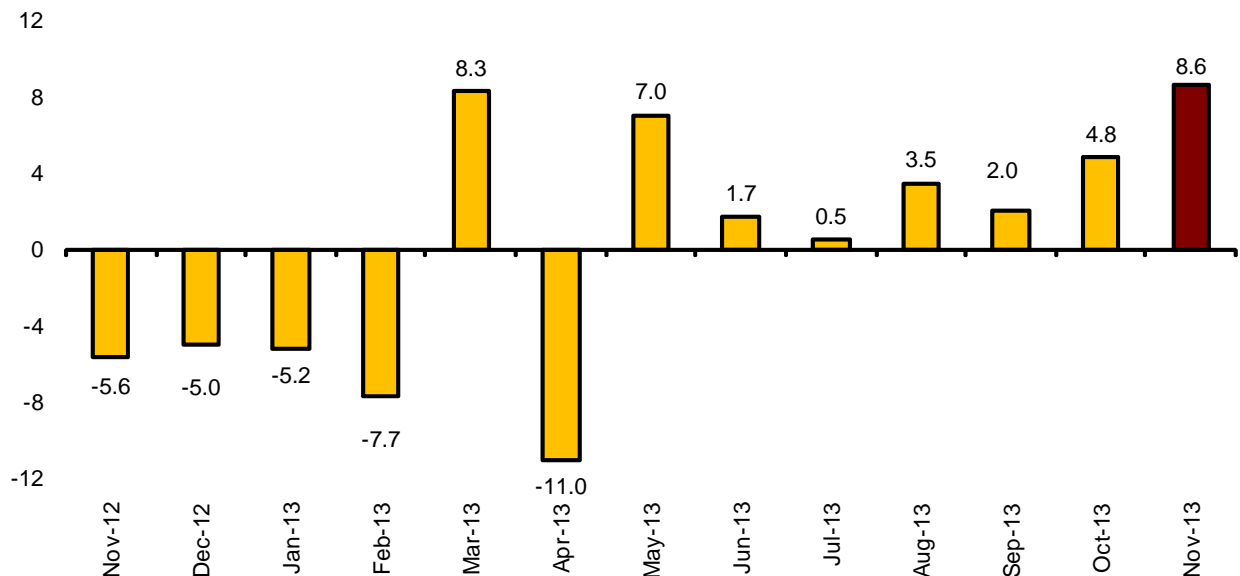
Hotels earn 35.3 euros per available room and invoice an average of 69.6 euros per occupied room

During the month of November, 15.0 million overnight stays were recorded in hotel establishments. This figure was 8.6% higher than that registered during the same month of 2012. Overnight stays for residents in Spain increased 12.7% and that of non-residents did so by 5.9%.

The average stay increased 1.5%, as compared with November 2012, standing at 3.0 nights per guest.

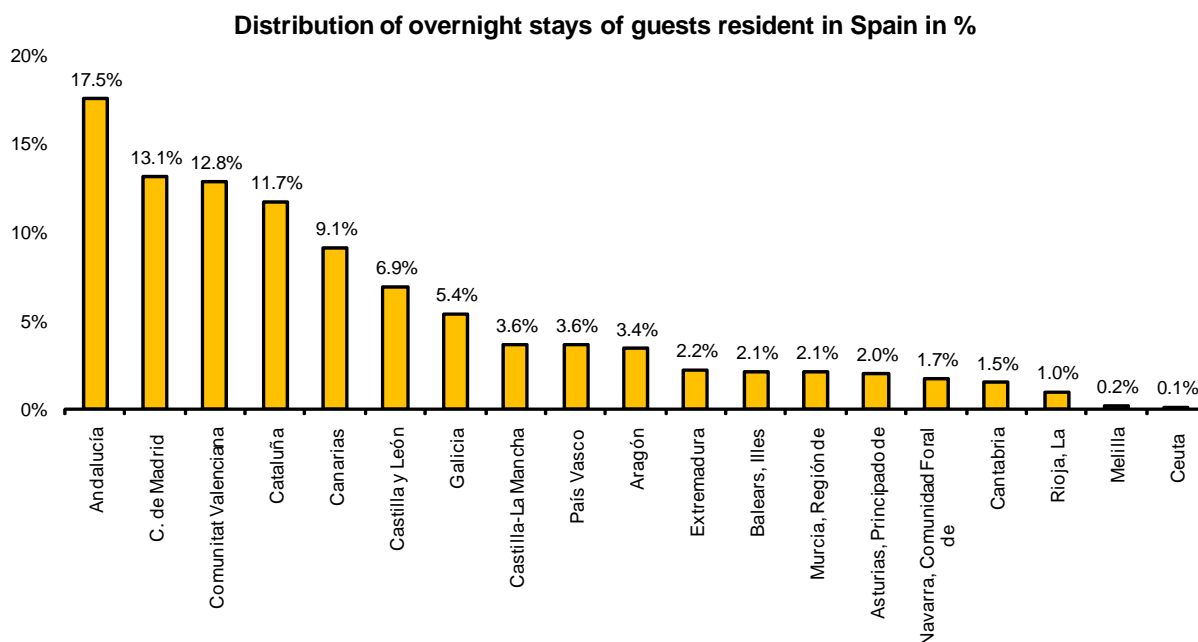
During the first eleven months of 2013, overnight stays increased 1.6%, as compared with the same period of the previous year.

Interannual rates of overnight stays in %

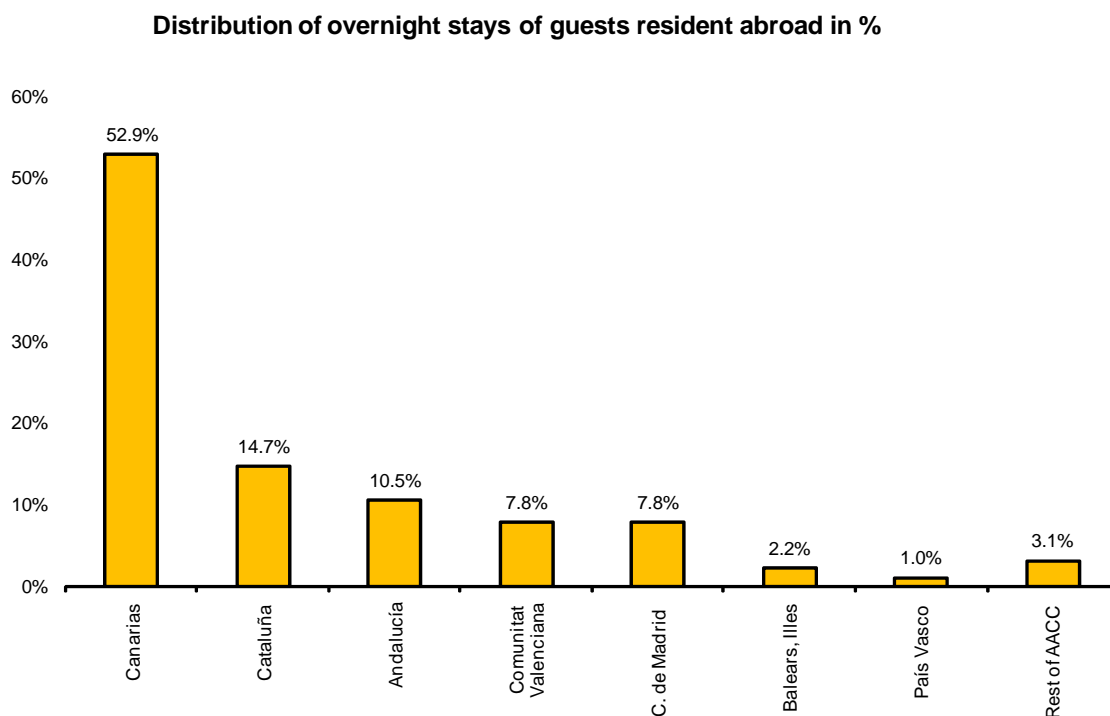


Main destinations

In November, Andalucía, Comunidad de Madrid, Comunitat Valenciana and Cataluña were the main destinations of guests resident in Spain, with interannual rates for overnight stays of 15.2%, 9.8%, 23.4% and 8.3%, respectively.



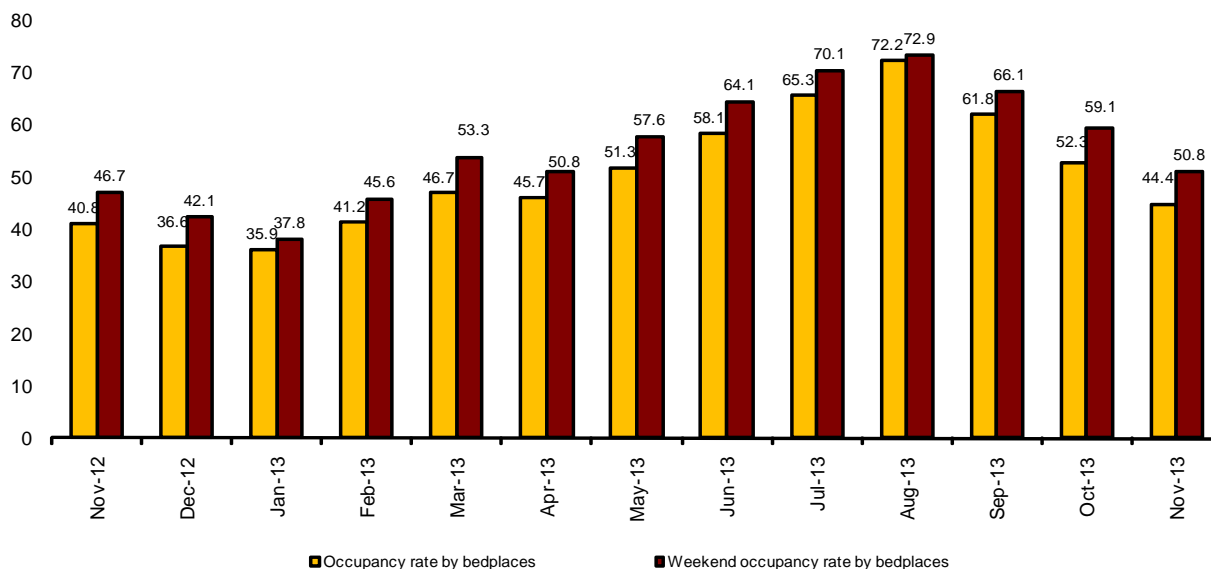
The main destination chosen by non-residents was Canarias, with a 52.9% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 10.7%, as compared with the same month of 2012. Followed by Cataluña, (with a 14.7% of the total), and Andalucía (10.5%), where overnight stays increased 1.9% and 6.6%, respectively.



Hotel Occupancy

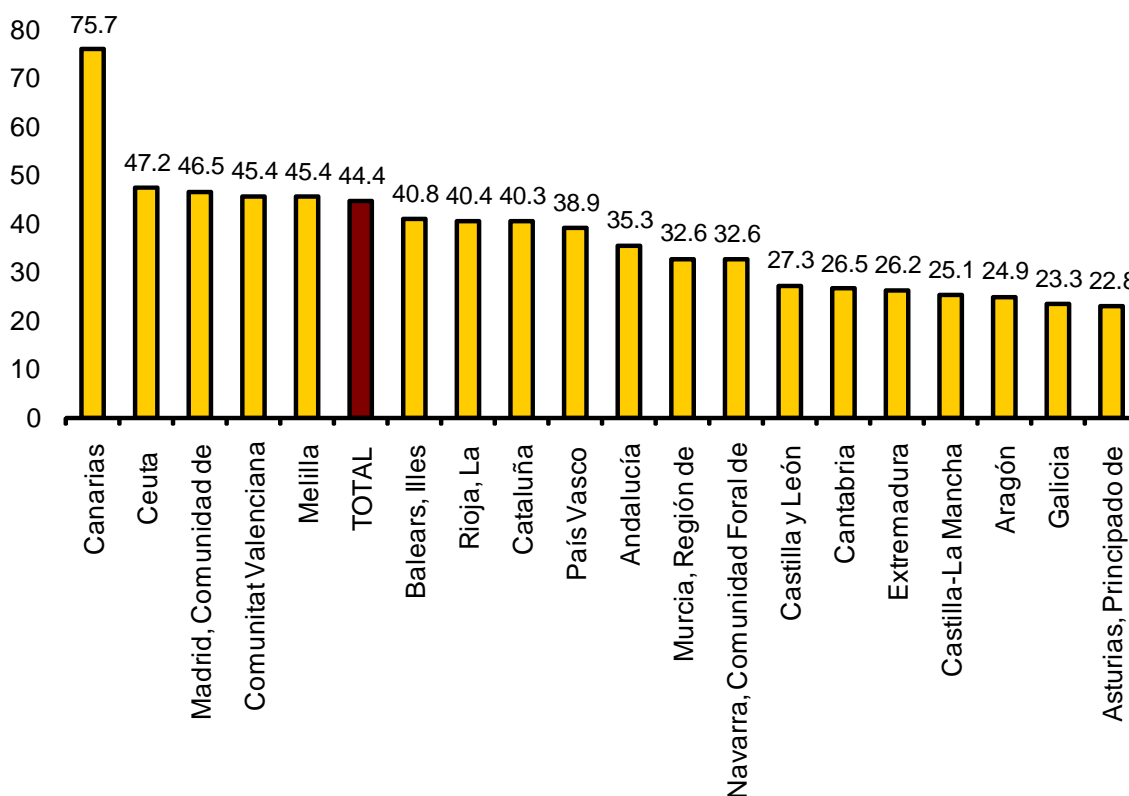
In terms of occupancy, 44.4% of the available bedplaces were occupied in November, with an 8.9% annual increase. The weekend occupancy rate by bedplaces increased 8.8% and stood at 50.8%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in November (75.7%), followed by Comunidad de Madrid (46.5%) and Comunitat Valenciana (45.4%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, the South of Tenerife registered both the highest occupancy rate by bedplaces (81.0%) and the highest weekend occupancy rate by bedplaces (80.3%) in November. In addition, the island of Tenerife, registered the highest number of overnight stays, with more than 2.0 million.

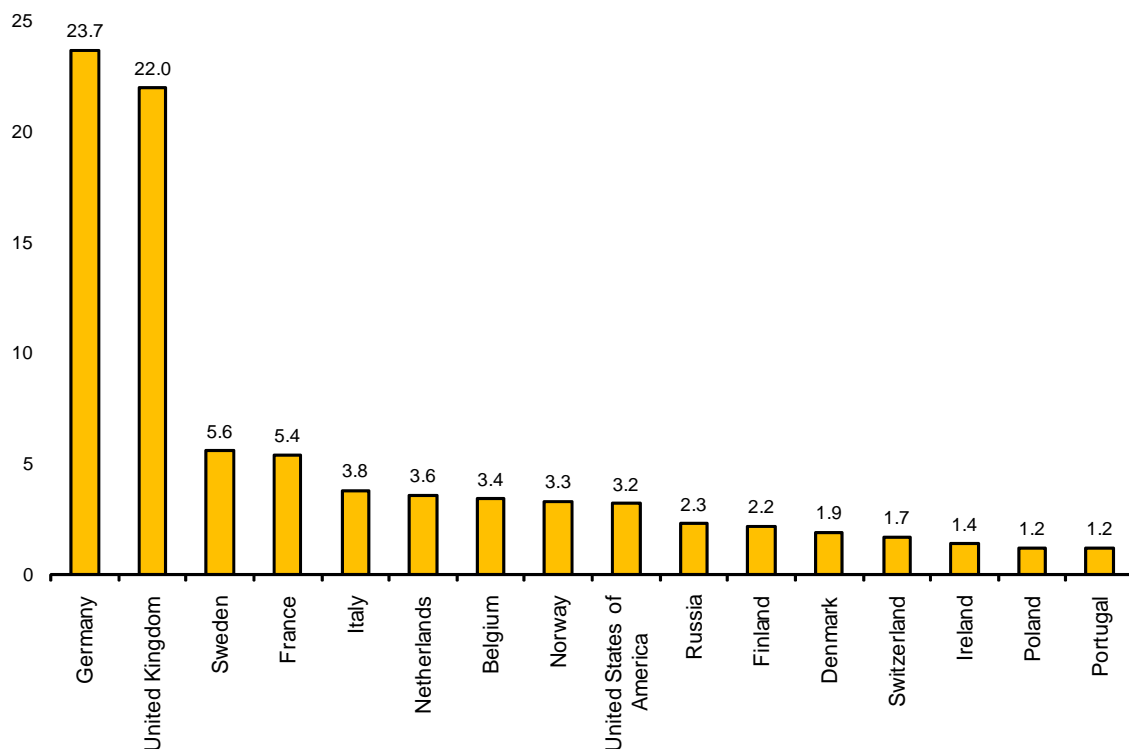
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and San Bartolomé de Tirajana. Arona reached both the highest occupancy rate by bedplaces (84.1%) and the highest weekend occupancy (82.7%).

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom registered 23.7% and 22.0%, respectively, of the total of overnight stays by non-residents in November. The German market experienced a 2.7% annual increase, while the British market increased 7.8%.

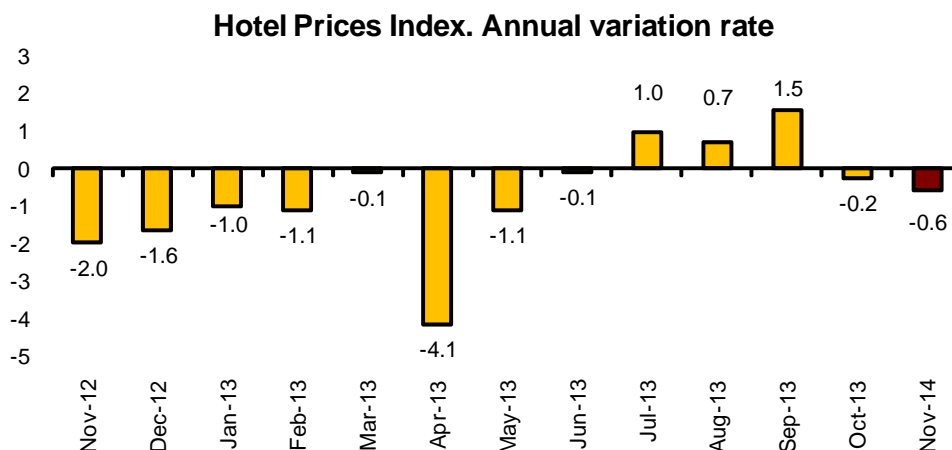
Overnight stays of guests from Sweden, France and Italy (the following countries of origin) registered annual rates of 11.6%, -14.3% and 3.3%, respectively.

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 -0.6% in November, that is, 0.3 points less than that of the previous month, and 1.4 points more than that registered the previous year.



Canarias, Cataluña, Comunidad de Madrid and Andalucía were the Autonomous Communities that carried the greatest weight of total load of the HPI in the month of November (together they represent 75% of the total weight). Hotel prices increased 4.0% in the annual rate in Canarias. In turn, they decreased 2.8% in Cataluña and 5.5% in Comunidad de Madrid. The prices remained still in Andalucía, as compared with November 2012.

By hotel category, the decreases in hotel prices were registered in one-silver-star hotels (-2.3%), in five-golden-stars hotels (-2.2%), in two-golden-star hotels and in two and three-silver-star hotels (-1.9%), in three-golden-star hotels (-1.0%) and in one-golden star hotels (-0.1%).

The remaining category, four-golden-star hotels, registered a positive annual rate (0.3%).

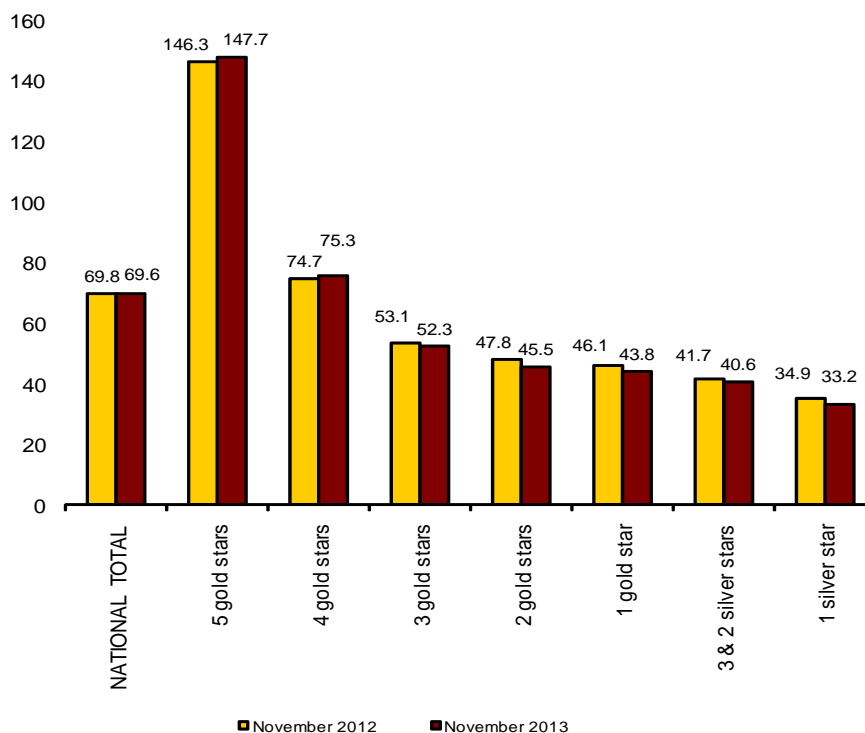
Indicators on the Profitability of the Hotel Sector

The average invoicing per occupied room (ADR) in November was 69.6 euros, a 0.2% decrease, as compared with the same month in 2012.

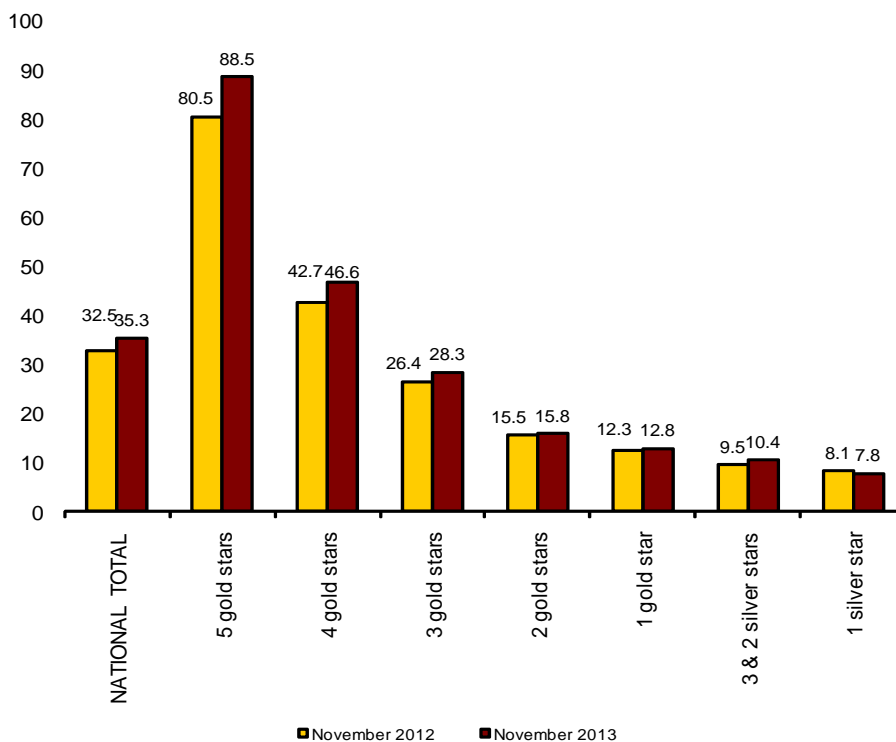
In turn, the average daily income per available room (RevPAR), that was conditioned by the occupancy registered in hotel establishments, reached 35.3 euros, with a 8.5% increase.

By category, the average invoicing was 147.7 euros for five-star hotels, 75.3 euros for four-star hotels and 52.3 euros for three-star hotels. Income per available room for the same categories was 88.5, 46.6 and 28.3 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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**Encuesta de Ocupación en Alojamientos Turísticos
(Establecimientos hoteleros)**

Noviembre 2013

Datos provisionales

1. Número de viajeros, pernoctaciones y estancia media según categoría del establecimiento

Categoría	Número de viajeros			Número de pernoctaciones			Estancia media
	Total	Residentes en España	Residentes en el extranjero	Total	Residentes en España	Residentes en el extranjero	
TOTAL	5.107.178	2.957.459	2.149.719	15.043.317	6.184.646	8.858.671	2,95
HOTELES: Estrellas oro							
Cinco	325.384	118.127	207.257	1.086.384	233.298	853.086	3,34
Cuatro	2.489.141	1.328.334	1.160.806	7.875.189	2.667.852	5.207.337	3,16
Tres	1.341.829	841.159	500.670	3.970.198	1.891.698	2.078.501	2,96
Dos	368.218	263.879	104.339	816.179	521.378	294.801	2,22
Una	142.089	101.525	40.564	306.772	199.572	107.200	2,16
HOSTALES: Estrellas plata							
Tres y dos	244.735	183.063	61.672	508.476	366.102	142.374	2,08
Una	195.782	121.372	74.410	480.119	304.747	175.372	2,45
Tasa anual	7,02	8,31	5,30	8,58	12,69	5,88	1,46
Tasa anual acumulada	0,69	-1,66	3,17	1,55	-2,09	3,61	0,85

2. Establecimientos, plazas, grados de ocupación y personal empleado según categoría del establecimiento

Categoría	Número establecimientos abiertos estimados según la encuesta	Número de plazas estimadas según la encuesta	Grado de ocupación			Total personal empleado
			Por plazas	Por plazas en fin de semana	Por habitaciones	
TOTAL	13.303	1.121.319	44,39	50,77	50,72	142.402
HOTELES: Estrellas oro						
Cinco	225	71.246	50,27	54,34	60,21	20.292
Cuatro	1.752	488.139	53,30	59,75	61,97	70.509
Tres	2.024	272.205	48,32	54,77	54,12	30.332
Dos	1.664	90.052	30,13	39,18	34,96	7.248
Una	1.025	41.591	24,51	31,51	29,23	3.227
HOSTALES: Estrellas plata						
Tres y dos	2.850	80.704	20,97	27,32	25,96	5.674
Una	3.763	77.381	20,61	25,05	25,00	5.120
Tasa anual	-1,69	-0,48	8,89	8,78	8,35	-1,84

3. Viajeros, pernoctaciones, estancia media, grados de ocupación y personal empleado

Datos por zonas y puntos turísticos

	Viajeros		Pernoctaciones		Grado ocupación			Estancia media	Total personal empleado
	Residentes en España	Residentes en el extranjero	Residentes en España	Residentes en el extranjero	Por plazas	Por plazas fin de semana	Por habitaciones		

Zonas turísticas con mayor grado de ocupación en el mes

Sur de Tenerife	23.573	191.615	133.943	1.498.535	80,97	80,25	91,27	7,59	12.417
Isla de Tenerife	59.900	233.619	291.054	1.789.005	79,03	78,67	88,89	7,09	15.666
Sur de Gran Canaria	16.814	137.103	95.144	1.166.149	77,92	77,98	90,02	8,19	9.539
Isla de Lanzarote	15.568	82.441	85.667	697.693	76,99	72,83	89,82	7,99	5.114
Isla de Gran Canaria	35.940	159.151	142.919	1.250.168	76,40	77,70	89,33	7,14	10.486
Isla de Fuerteventura	7.421	95.551	28.955	871.507	70,73	69,15	83,59	8,74	6.885
Isla de La Gomera	1.968	4.733	4.155	30.463	64,84	75,24	76,85	5,17	373
Costa Blanca	137.067	101.153	469.178	491.253	54,12	57,67	54,76	4,03	6.805

Zonas turísticas con mayor número de pernoctaciones en el mes*

Barcelona	134.496	383.648	247.632	971.802	52,50	60,27	64,01	2,35	12.308
Costa del Sol	84.624	116.171	215.398	479.692	43,74	49,71	51,85	3,46	6.767
Isla de Mallorca	28.593	34.353	88.270	192.002	40,87	43,08	47,70	4,45	3.247
Costa Brava	66.103	53.369	122.730	140.429	34,38	44,26	35,17	2,20	2.591
Palma - Calvià	25.629	28.120	81.557	150.496	42,42	46,10	51,11	4,32	2.666
Costa de la Luz de Cádiz	40.621	20.131	83.612	65.495	23,75	30,50	29,65	2,45	2.010
Costa Daurada	44.528	13.518	93.044	38.910	29,13	41,11	35,27	2,27	1.295
Catalunya Central	43.809	15.513	85.887	38.653	29,54	35,88	39,30	2,10	1.615

Puntos turísticos con mayor grado de ocupación en el mes

Arona	4.266	54.304	29.705	456.311	84,11	82,70	93,76	8,30	3.183
Mogán	1.219	39.141	7.608	326.514	82,57	81,62	92,07	8,28	1.978
Puerto de la Cruz	20.569	29.711	120.597	244.574	80,04	81,02	86,81	7,26	2.450
Adeje	10.202	99.623	60.267	796.285	79,85	79,09	89,35	7,80	6.818
Yaiza	6.778	38.871	45.229	325.579	78,81	75,68	92,39	8,12	2.637
Tías	2.372	24.349	12.128	212.052	78,11	73,54	90,93	8,39	1.351
San Bartolomé de Tirajana	15.726	97.904	88.834	838.300	76,42	76,73	89,34	8,16	7.564
Pájara	2.398	64.308	12.668	597.073	74,49	73,17	86,23	9,14	4.614
Teguise	3.692	17.981	22.105	150.595	74,41	68,15	86,93	7,97	1.005
Benidorm	78.054	69.212	363.982	396.906	68,55	69,38	65,85	5,17	4.374

Puntos turísticos con mayor número de pernoctaciones en el mes*

Madrid	359.616	275.207	629.732	623.724	50,40	62,39	62,28	1,97	11.435
Barcelona	125.550	368.471	231.464	937.315	53,16	61,64	64,48	2,37	11.870
Sevilla	75.395	61.959	137.549	136.370	46,01	54,92	52,04	1,99	2.909
Valencia	65.694	50.714	107.675	122.048	43,59	58,13	52,96	1,97	1.927
Torremolinos	16.828	22.670	68.538	139.726	63,87	73,48	74,60	5,27	1.367
Granada	70.420	42.493	130.487	69.488	46,90	72,19	49,68	1,77	1.570
Palma	21.056	24.352	56.704	122.585	41,34	46,03	53,05	3,95	2.179
Málaga	33.154	36.960	56.998	81.952	47,99	58,83	58,30	1,98	1.131
Palmas de Gran Canaria (Las)	15.637	18.975	41.204	75.913	64,82	77,00	86,76	3,38	796
Lloret de Mar	17.410	18.097	44.029	68.367	52,67	57,71	51,16	3,17	581

*Sin considerar los incluidos en la tabla anterior, por aparecer también con mayor grado de ocupación.

4. Viajeros y pernoctaciones según país de residencia

Datos por países

Países	Viajeros		Pernoctaciones	
	Total	%	Total	%
TOTAL	5.107.178	100,00	15.043.317	100,00
Residentes en España	2.957.459	57,91	6.184.646	41,11
Residentes en el extranjero	2.149.719	42,09	8.858.671	58,89
TOTAL residentes en el extranjero	2.149.719	100,00	8.858.671	100,00
TOTAL residentes en U.E. (sin España)	1.471.589	68,45	6.969.348	78,67
- Alemania	313.356	14,58	2.095.884	23,66
- Austria	21.573	1,00	100.807	1,14
- Bélgica	60.045	2,79	301.072	3,40
- Dinamarca	31.282	1,46	167.817	1,89
- Finlandia	32.932	1,53	190.569	2,15
- Francia	197.674	9,20	480.609	5,43
- Grecia	7.296	0,34	17.870	0,20
- Irlanda	26.070	1,21	125.515	1,42
- Italia	118.688	5,52	339.419	3,83
- Luxemburgo	3.206	0,15	17.307	0,20
- Países Bajos	78.300	3,64	321.893	3,63
- Polonia	25.111	1,17	108.948	1,23
- Portugal	51.705	2,41	107.806	1,22
- Reino Unido	371.864	17,30	1.951.932	22,03
- República Checa	8.311	0,39	26.073	0,29
- Suecia	81.896	3,81	491.619	5,55
- Resto de la UE*	42.280	1,97	124.210	1,40
Noruega	47.899	2,23	290.685	3,28
Rusia	49.973	2,32	206.202	2,33
Suiza	34.281	1,59	151.072	1,71
Resto de Europa	53.491	2,49	140.163	1,58
Japón	57.392	2,67	95.694	1,08
Estados Unidos	120.084	5,59	281.635	3,18
Resto de América	132.449	6,16	319.001	3,60
Países africanos	34.390	1,60	77.236	0,87
Resto del mundo	148.170	6,89	327.633	3,70

*Países incluidos en Resto de la UE: Bulgaria, Chipre, Croacia, Eslovaquia, Eslovenia, Estonia, Hungría, Letonia, Lituania, Malta y Rumanía

ÍNDICE DE PRECIOS HOTELEROS (IPH). Base 2008

Noviembre 2013

Datos provisionales

Índice general nacional y desglose por comunidades y ciudades autónomas

	Índice	Tasa de variación anual
TOTAL	90,4	-0,6
Andalucía	89,9	0,0
Aragón	76,3	-2,7
Asturias, Principado de	83,8	-2,6
Balears, Illes	89,9	-4,1
Canarias	104,2	4,0
Cantabria	83,5	-4,7
Castilla y León	86,4	-3,1
Castilla - La Mancha	86,9	-2,8
Cataluña	84,9	-2,8
Comunitat Valenciana	88,2	-2,5
Extremadura	87,7	-3,1
Galicia	88,4	-1,4
Madrid, Comunidad de	77,0	-5,5
Murcia, Región de	74,2	-6,9
Navarra, Comunidad Foral de	83,0	-0,6
País Vasco	91,3	1,1
Rioja, La	88,3	0,6
Ceuta	94,9	0,6
Melilla	93,4	-2,9

Índice general nacional y desglose por categorías

	Índice	Tasa de variación anual
TOTAL	90,4	-0,6
HOTELES: Estrellas oro		
Cinco	88,0	-2,2
Cuatro	91,4	0,3
Tres	88,5	-1,0
Dos	89,6	-1,9
Una	90,1	-0,1
HOSTALES: Estrellas plata		
Tres y dos	88,8	-1,9
Una	95,7	-2,3

Indicadores de Rentabilidad del Sector Hotelero

Noviembre 2013

Datos Provisionales

ADR y RevPAR^(*) nacional y desglose por comunidades y ciudades autónomas

	ADR (en euros)	Tasa de variación anual	RevPAR (en euros)	Tasa de variación anual
TOTAL	69,6	-0,3	35,3	8,5
Andalucía	58,6	3,0	24,5	14,3
Aragón	49,3	-3,6	14,2	-10,5
Asturias, Principado de	50,4	-6,3	14,5	5,4
Baleares, Illes	57,9	-11,7	27,2	-12,2
Canarias	82,5	5,1	72,0	18,8
Cantabria	55,1	-3,2	15,3	-3,5
Castilla y León	51,3	-2,4	15,4	3,9
Castilla - La Mancha	52,8	-3,2	15,0	8,2
Cataluña	80,7	-2,4	39,5	5,8
Comunitat Valenciana	51,1	-7,9	24,3	0,5
Extremadura	52,1	-3,0	15,0	-6,1
Galicia	47,9	-3,0	13,2	3,4
Madrid, Comunidad de	74,7	-6,9	42,7	-6,9
Murcia, Región de	47,7	-9,7	18,9	2,3
Navarra, Comunidad Foral de	59,1	-0,4	22,1	15,0
País Vasco	68,4	-1,2	33,4	-1,5
La Rioja	60,0	-1,7	27,1	6,0
Ceuta	66,4	-2,1	31,6	5,7
Melilla	63,0	0,5	38,5	25,0

ADR y RevPAR^(*) nacional y desglose por categorías

	ADR (en euros)	Tasa de variación anual	RevPAR (en euros)	Tasa de variación anual
TOTAL	69,6	-0,3	35,3	8,5
HOTELES: Estrellas oro				
Cinco	147,7	1,0	88,5	10,0
Cuatro	75,3	0,9	46,6	9,2
Tres	52,3	-1,4	28,3	7,3
Dos	45,5	-4,8	15,8	1,6
Una	43,8	-5,0	12,8	4,5
HOSTALES: Estrellas plata				
Tres y dos	40,6	-2,4	10,4	10,3
Una	33,2	-4,8	7,8	-4,6

(*) ADR: Average Daily Rate, Tarifa Media Diaria

RevPAR: Revenue per Available Room, Ingresos por Habitación Disponible