

24 April 2017

Hotel Tourism Accommodation (EOH/IPH/IRSH)
March 2017. *Provisional data*

**Overnight stays in hotel establishments decrease 7.4% in March
with respect to the same month in 2016**

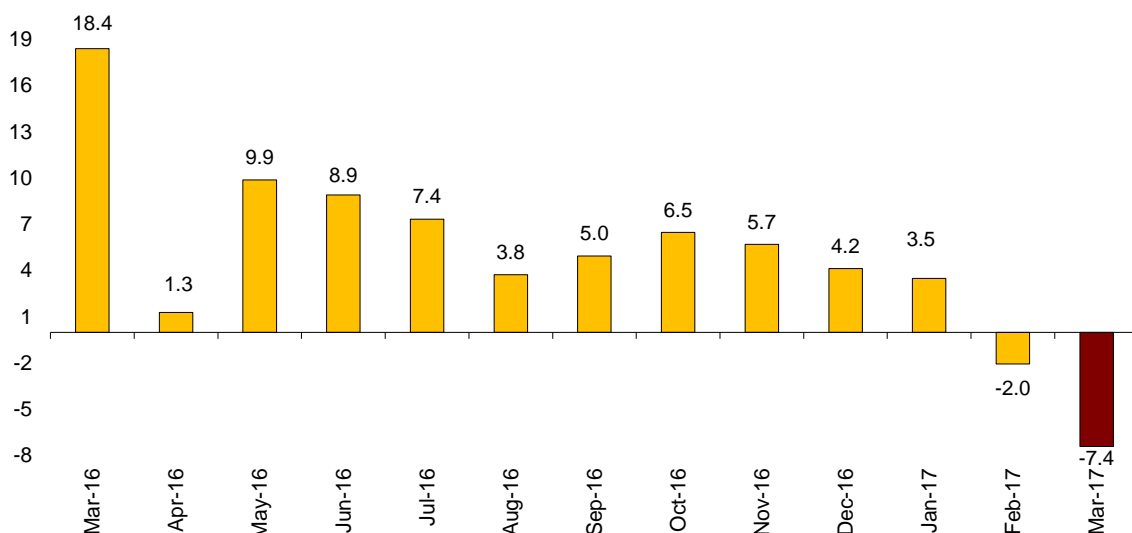
**Hotels invoice an average of 78.3 euros per occupied room, which
means an annual increase of 4.3%**

During the month of March overnight stays in hotel establishments exceeded 20.3 million, 7.4% less than in the same month of 2016. The overnight stays of travellers resident in Spain decreased by 16.6% and those of non-residents by 0.5%.

The average stay decreased 3.1% as compared with March 2016, standing at 3.0 overnight stays per traveller.

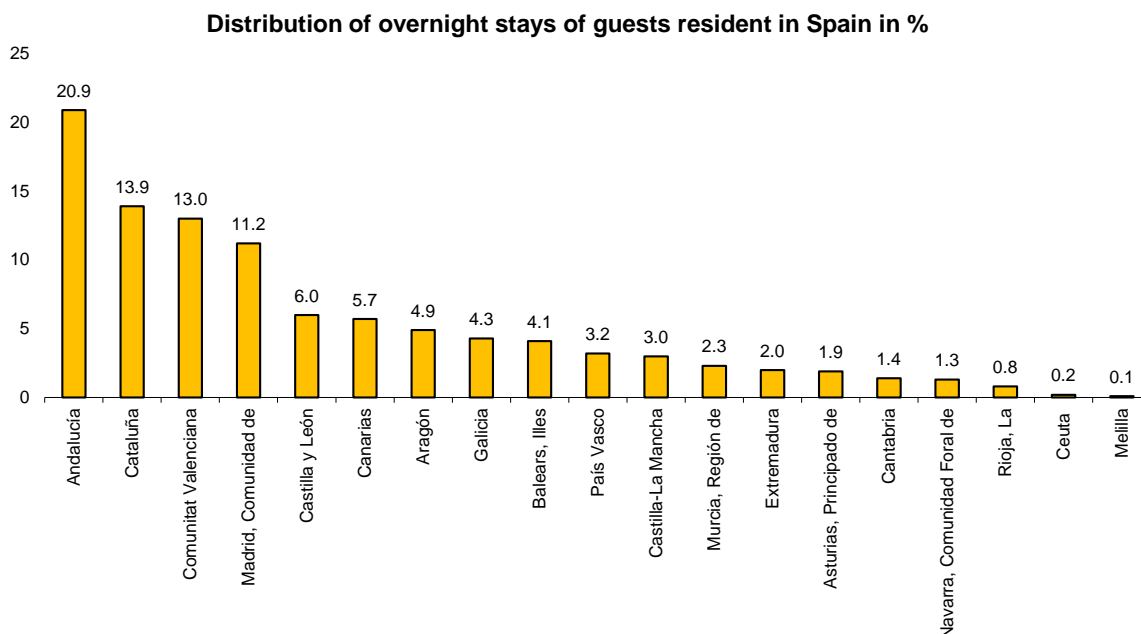
During the first three months of 2017 the number of overnight stays is reduced by 2.8% compared to the same period of the previous year.

Annual rates of overnight stays in %

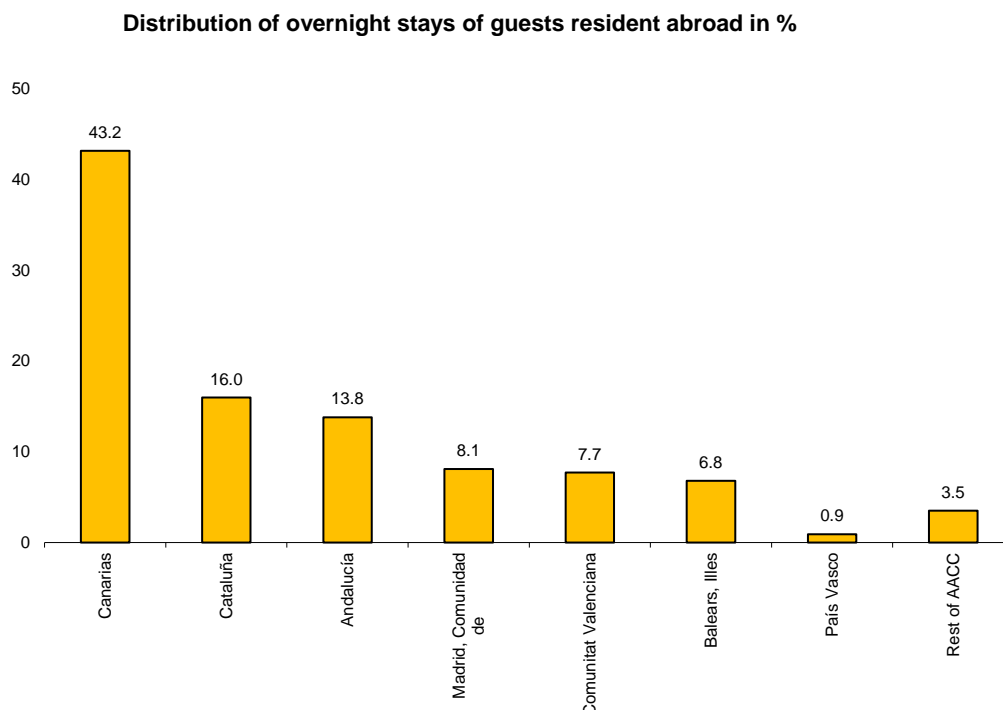


Destinations

Andalucía, Cataluña, Comunitat Valenciana and Comunidad de Madrid are the main destinations of travellers residing in Spain in March, with annual rates of variation in the number of overnight stays of -16.6%, -23.2%, -22.3 % and -3.2%, respectively.



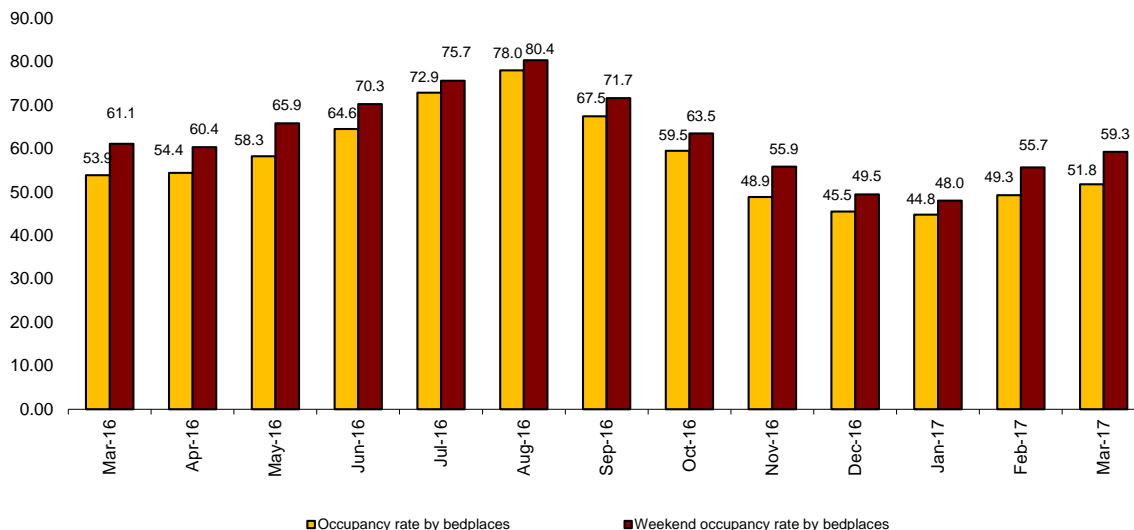
The main destination chosen by non-residents is Canarias, with 43.2% of total overnight stays. In this community, overnight stays of foreigners are up 0.2% compared to March 2016. The following destinations for non-residents are Cataluña (with 16.0% of the total and a growth of 2.1% in overnight stays) and Andalucía (with 13.8% of total overnight stays and an annual decrease of 3.2%).



Hotel occupancy

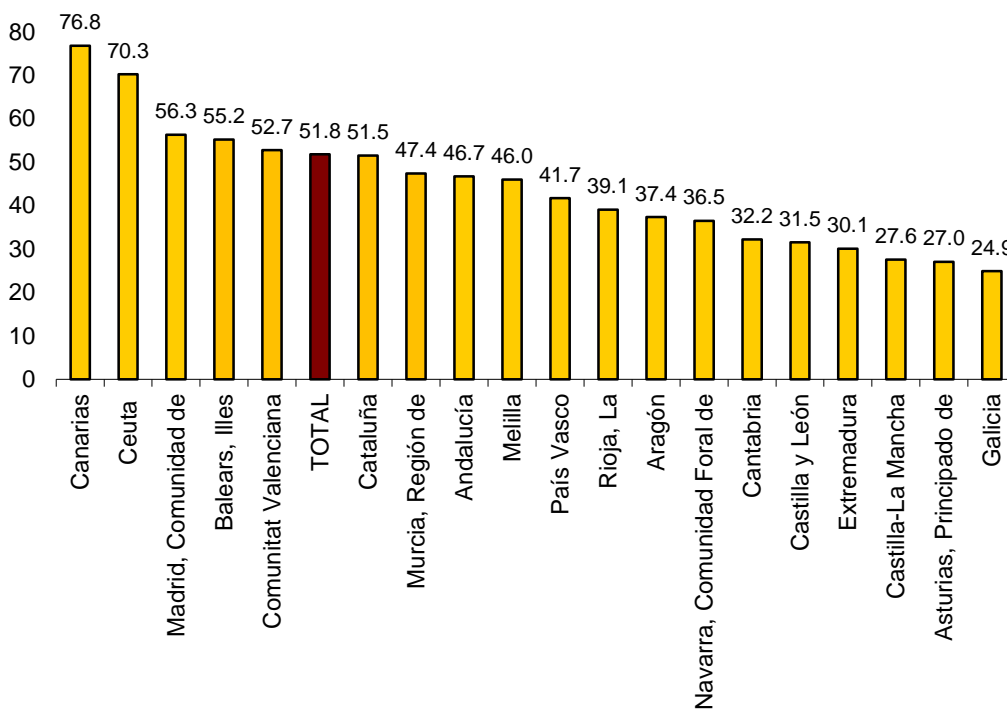
In March, 51.8% of the places offered were covered, with an annual decrease of 3.8%. The level of occupancy by places at the weekend declines by 3.1% and stands at 59.3%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias has the highest occupancy rate in March (76.8%). It is followed by Comunidad de Madrid (56.3%) and Illes Balears (55.2%).

Occupancy rate by bedplaces by Automous Community



By tourist areas, the South of Gran Canaria has the highest occupancy by places (79.7%) and the South of Tenerife the highest occupancy rate at the weekend (80.5%). The tourist area of Barcelona has the highest number of overnight stays, with 1.7 million.

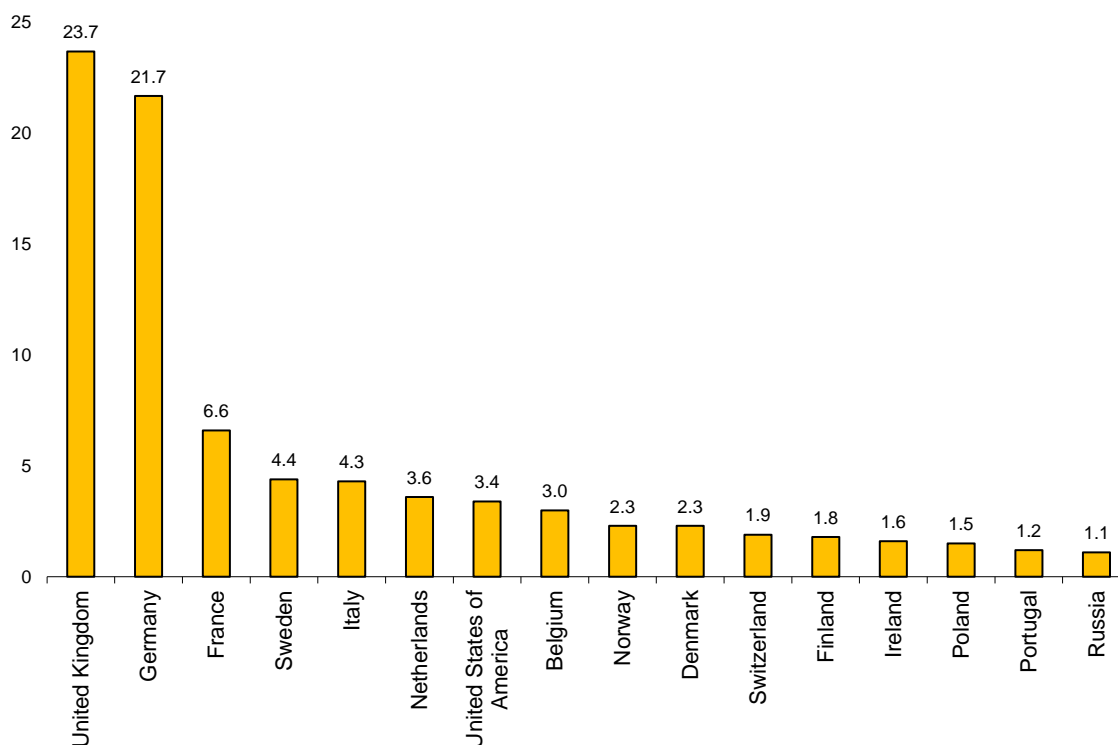
The tourist spots with more overnight stays are Barcelona, Madrid and Benidorm. Puerto de la Cruz reaches the highest occupancy by places (82.8%) and Adeje the highest occupation at the weekend (82.3%).

Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany account for 23.7% and 21.7%, respectively, of total overnight stays of non-residents in hotel establishments in March. The British market decreased by 1.1% and the German by 9.1%.

Overnight stays by travellers from France, Sweden and Italy (the following issuing markets) recorded annual rates of 5.9%, 2.2% and 1.5%, respectively.

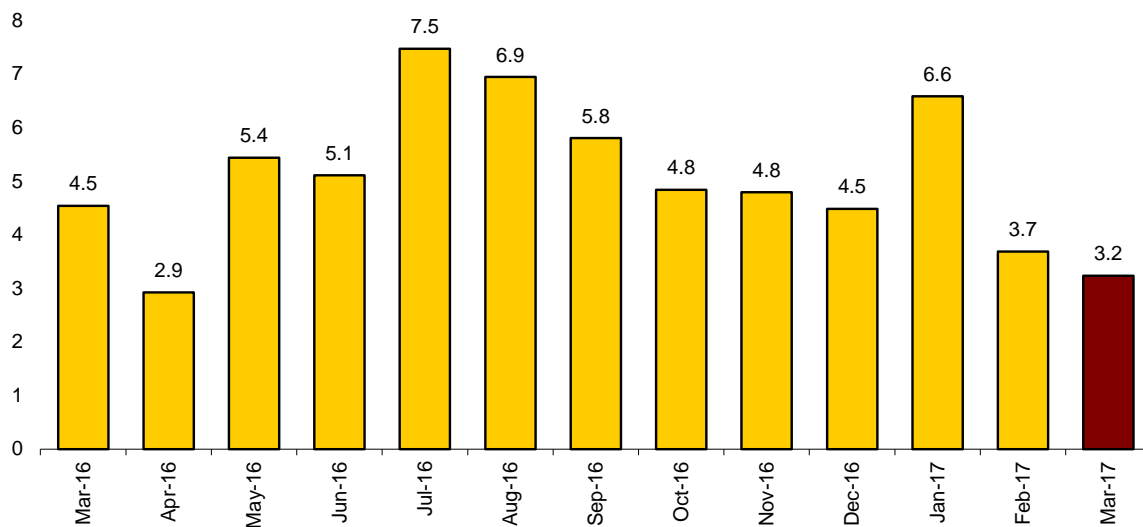
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Price Rate (in Spanish IPH) stood at 3.2% in March, which is 0.5 points lower than last month and 1.3 points lower than a year ago.

Hotel Prices Index. Annual variation rate



Canarias, Cataluña, Andalucía and Comunidad de Madrid are the most heavily weighted communities in the IPH in March (accounting for 72.6% of the total weight). Hotel prices are up 6.8% in annual rates in the Canary Islands, 5.7% in Catalonia and 2.2% in Comunidad de Madrid. In Andalucía hotel prices decreased by 2.1%.

By categories, prices increased in establishments of three-star gold (5.6%), four gold stars (3.3%), one silver star (1.6%), five gold stars (1.5%) and three and two silver stars (0.9%).

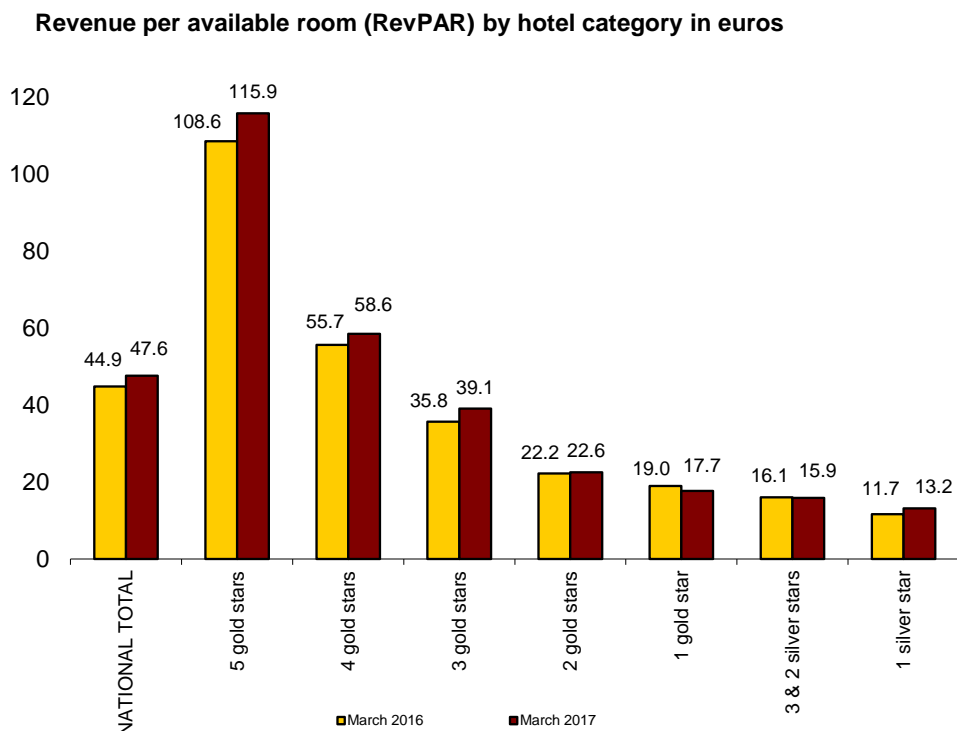
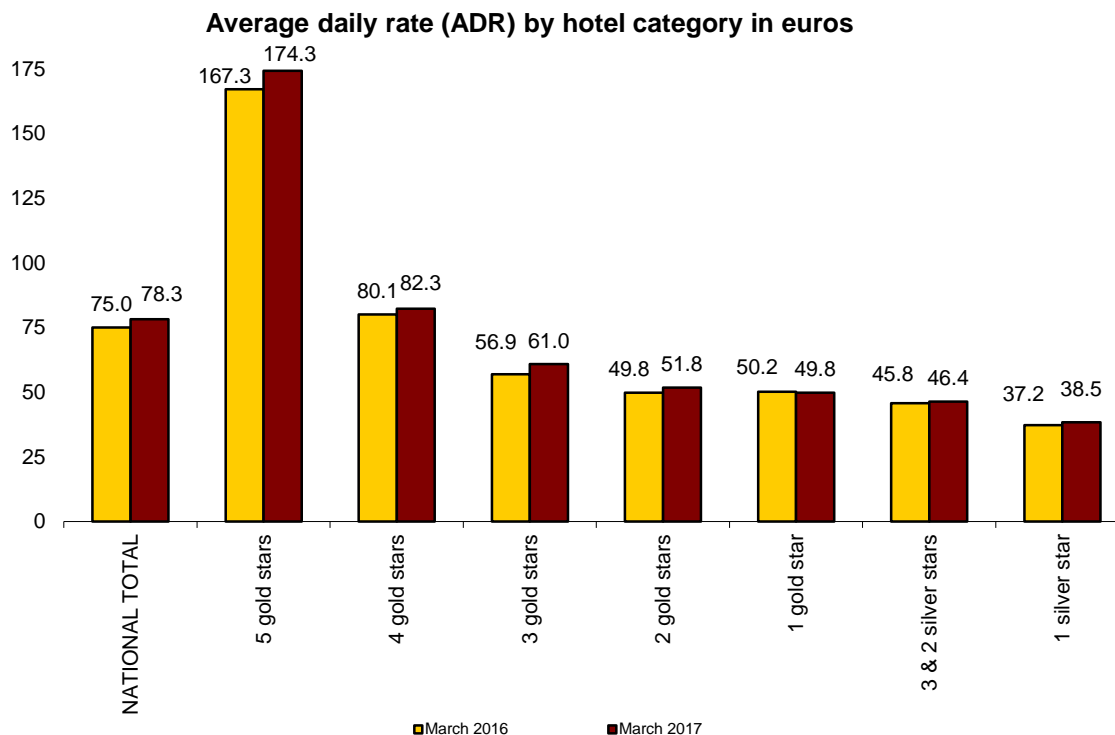
On the other hand, prices are maintained in establishments of two gold stars and decreased by 0.4% in those of a gold star.

Profitability of the Hotel Sector

The average daily turnover of hotels per occupied room (ADR) is 78.3 euros in March, which means an increase of 4.3% compared to the same month of 2016.

Meanwhile, the average daily income per room available (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 47.6 euros, an increase of 6.1%.

By category, the average invoicing is 174.3 euros for five-star hotels, 82.3 euros for four-star hotels and 61.0 euros for three-star hotels. Income per available room for these same categories are 115.9, 58.6 and 39.1 euros, respectively.



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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

March 2017

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	6,901,184	3,692,240	3,208,944	20,391,556	7,855,537	12,536,019	2.95
HOTELS: Golden stars							
Five	415,567	130,753	284,814	1,424,041	252,779	1,171,262	3.43
Four	3,358,748	1,655,391	1,703,357	10,831,046	3,595,116	7,235,929	3.22
Three	1,788,132	1,010,835	777,297	5,351,690	2,323,984	3,027,705	2.99
Two	501,328	337,325	164,003	1,047,102	615,101	432,001	2.09
One	209,624	136,442	73,183	414,177	236,642	177,535	1.98
INNS: Silver stars							
Two and three	343,837	247,374	96,463	661,587	443,249	218,338	1.92
One	283,947	174,120	109,827	661,915	388,666	273,249	2.33
Annual rate	-4.44	-10.17	3.13	-7.41	-16.60	-0.53	-3.11
Cumulative annual rate	0.29	-4.49	6.57	-2.76	-11.43	3.12	-3.04

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	
TOTAL	13,548	613,122	1,257,983	51.81	59.26	60.76	171,817
HOTELS: Golden stars							
Five	268	40,549	83,569	54.51	60.24	65.16	26,686
Four	2,025	274,091	580,253	59.61	66.50	71.33	85,448
Three	2,168	145,306	304,938	56.08	63.75	64.26	36,891
Two	1,694	47,628	92,466	36.30	46.18	43.30	7,862
One	1,059	22,859	44,129	30.18	39.01	36.33	3,635
INNS: Silver stars							
Two and three	2,797	41,738	78,438	27.07	37.29	33.04	5,719
One	3,537	40,951	74,190	28.68	34.69	35.48	5,577
Annual rate	-3.17	-2.96	-2.97	-3.81	-3.05	1.20	1.13

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 Gran Canaria	13,536	167,863	66,892	1,392,545	79.66	80.31	90.07	8.05	11,095
Isla de La Palma	3,594	12,027	9,854	90,037	79.58	78.17	89.21	6.39	725
Isla de Gran Canaria	35,303	190,336	115,947	1,489,217	78.68	79.67	89.65	7.11	12,135
Sur de Tenerife	16,090	197,510	76,783	1,545,010	78.52	80.46	87.68	7.59	14,214
Isla de Tenerife	48,717	245,194	202,280	1,889,409	77.92	79.52	86.75	7.12	17,665
Isla de Lanzarote	14,882	107,572	71,021	818,520	77.27	77.70	91.32	7.26	6,345
Isla de La Gomera	1,613	7,622	3,040	39,489	76.13	80.29	83.46	4.61	401
Isla de Fuerteventura	9,740	130,977	44,008	1,082,136	71.96	73.37	84.21	8.00	8,455

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

Barcelona	163,654	516,625	308,153	1,400,348	66.51	71.42	79.04	2.51	13,894
Costa Blanca	149,866	146,728	519,476	685,891	60.45	68.36	65.75	4.06	8,250
Costa del Sol	116,937	204,505	332,791	869,022	54.91	58.88	68.53	3.74	9,329
Isla de Mallorca	61,022	156,153	259,816	840,993	56.30	59.22	64.39	5.07	10,022
Palma - Calvià	39,265	95,262	172,221	482,837	56.94	59.27	66.26	4.87	5,940
Costa Barcelona	120,176	119,030	242,443	285,835	51.82	51.43	64.25	2.21	3,878
Costa Brava	80,900	93,082	166,186	224,633	37.30	52.86	45.17	2.25	3,619
Costa de Almería	60,279	12,197	245,896	56,388	44.34	50.70	61.38	4.17	2,007

Tourist site with a greater occupancy rate per month

Puerto de La Cruz	16,308	32,485	88,277	284,127	82.80	81.50	87.66	7.63	2,518
Tías	2,612	31,021	14,132	246,058	82.57	81.88	92.40	7.74	1,451
San Bartolomé de Tirajana	11,030	122,466	55,108	1,019,598	80.66	82.08	90.62	8.05	8,755
Arona	3,748	56,629	21,448	463,373	79.31	80.50	87.80	8.03	3,330
Adeje	5,353	104,915	29,653	820,824	79.05	82.33	87.43	7.71	8,020
Yaiza	5,176	52,032	28,601	385,767	77.10	76.30	90.79	7.24	3,366
Mogán	2,578	45,693	10,325	374,008	76.79	75.29	88.35	7.96	2,325
Pájara	3,631	77,612	18,114	677,632	74.22	75.42	83.29	8.56	5,153
Palmas de Gran Canaria (Las)	18,580	18,684	41,388	83,088	72.06	75.75	87.95	3.34	845
Teguise	3,749	22,523	19,813	174,818	71.92	75.52	91.78	7.41	1,408

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

Barcelona	151,820	500,232	283,789	1,358,066	67.63	72.86	79.87	2.52	13,151
Madrid	385,719	388,471	650,069	890,703	59.07	67.50	74.50	1.99	12,031
Benidorm	71,286	79,420	348,540	459,652	68.73	77.03	72.38	5.36	4,785
Sevilla	107,039	101,833	186,414	229,823	61.60	69.83	72.67	1.99	3,393
Palma	25,052	61,631	65,609	269,494	56.17	59.64	66.50	3.87	3,339
Valencia	84,627	65,397	141,926	170,281	53.22	68.04	66.66	2.08	2,125
Calvià	15,944	31,312	121,411	189,169	57.17	58.63	65.34	6.57	2,465
Torremolinos	23,859	35,900	90,495	204,577	64.38	70.50	72.04	4.94	1,725
Granada	75,923	68,084	133,543	119,391	58.38	75.43	64.97	1.76	1,709
Benalmádena	14,462	26,233	80,772	158,713	60.77	62.98	79.14	5.88	1,361

* 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	%
TOTAL	6,901,184	100.00	20,391,556	100.00
Residents in Spain	3,692,240	53.50	7,855,537	38.52
Residents abroad	3,208,944	46.50	12,536,019	61.48
Total Residents abroad	3,208,944	100.00	12,536,019	100.00
Total Residents in E.U. (without Spain)	2,186,635	68.14	9,890,427	78.90
- Germany	456,497	14.23	2,718,914	21.69
- Austria	25,818	0.80	109,734	0.88
- Belgium	77,525	2.42	377,574	3.01
- Denmark	50,564	1.58	281,771	2.25
- Finland	40,891	1.27	222,751	1.78
- France	306,414	9.55	830,238	6.62
- Greece	8,745	0.27	24,527	0.20
- Ireland	47,540	1.48	196,523	1.57
- Italy	178,902	5.58	544,261	4.34
- Luxembourg	4,544	0.14	21,459	0.17
- Netherlands	104,915	3.27	445,005	3.55
- Poland	43,428	1.35	192,101	1.53
- Portugal	75,430	2.35	154,606	1.23
- United Kingdom	589,017	18.36	2,966,751	23.67
- Czech Republic	10,728	0.33	40,319	0.32
- Sweden	94,337	2.94	551,060	4.40
- Other EU countries*	71,339	2.22	212,831	1.70
Norway	43,654	1.36	287,424	2.29
Russia	42,834	1.33	133,989	1.07
Switzerland	58,855	1.83	233,427	1.86
Rest of Europe	66,971	2.09	202,432	1.61
Japan	60,469	1.88	113,482	0.91
United States of America	177,964	5.55	431,510	3.44
Rest of America	197,594	6.16	487,737	3.89
Africa	48,066	1.50	108,978	0.87
Other countries	325,902	10.16	646,613	5.16

*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 2017

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	98.6	3.2
Andalucía	92.8	-2.1
Aragón	80.1	-0.4
Asturias, Principado de	82.3	-6.5
Balears, Illes	109.3	8.1
Canarias	123.1	6.8
Cantabria	83.9	-7.2
Castilla y León	86.3	-3.0
Castilla - La Mancha	85.4	-1.6
Cataluña	91.4	5.7
Comunitat Valenciana	95.4	1.3
Extremadura	87.3	-3.2
Galicia	89.5	-2.0
Madrid, Comunidad de	82.7	2.2
Murcia, Región de	78.8	2.4
Navarra, Comunidad Foral de	82.3	-2.7
País Vasco	85.5	0.3
Rioja, La	82.6	-5.9
Ceuta	84.7	6.1
Melilla	95.0	-3.1

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	98.6	3.2
HOTELS: Gold stars		
Five	91.3	1.5
Fourth	99.6	3.3
Three	100.9	5.6
Two	91.4	0.0
One	100.1	-0.4
HOSTALS: Silver stars		
Three and two	95.3	0.9
One	101.5	1.6

Indicators on the Profitability of the Hotel Sector

March 2017

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	78.3	4.3	47.6	6.1
Andalucía	64.9	-2.7	37.2	-3.0
Aragón	59.3	-2.4	25.7	-0.2
Asturias, Principado de	53.2	-5.7	16.9	-23.7
Balears, Illes	68.6	4.0	45.3	8.0
Canarias	100.9	5.8	89.0	5.4
Cantabria	55.7	-6.5	20.1	-14.3
Castilla y León	53.7	-4.6	19.8	-6.8
Castilla - La Mancha	53.4	-3.7	17.6	-6.5
Cataluña	90.8	9.9	57.4	18.7
Comunitat Valenciana	59.5	3.8	35.0	0.5
Extremadura	56.4	-5.5	19.4	-9.6
Galicia	50.2	-4.1	15.5	-3.5
Madrid, Comunidad de	81.3	2.7	57.1	6.7
Murcia, Región de	53.1	-2.3	30.4	2.0
Navarra, Comunidad Foral de	60.2	-0.4	27.0	2.4
País Vasco	69.3	-1.2	36.7	-3.4
Rioja, La	59.7	-7.1	28.7	-12.3
Ceuta	67.9	4.7	51.1	55.0
Melilla	66.1	0.8	39.1	-8.4

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	78.3	4.3	47.6	6.1
HOTELS: Gold stars				
Five	174.3	4.2	115.9	6.7
Four	82.3	2.8	58.6	5.2
Three	61.0	7.1	39.1	9.3
Two	51.8	4.0	22.6	1.7
One	49.8	-0.7	17.7	-6.7
GUESTHOUSES: Silver stars				
Three and two	46.4	1.4	15.9	-0.9
One	38.5	3.3	13.2	12.7

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room