

24 February 2014

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

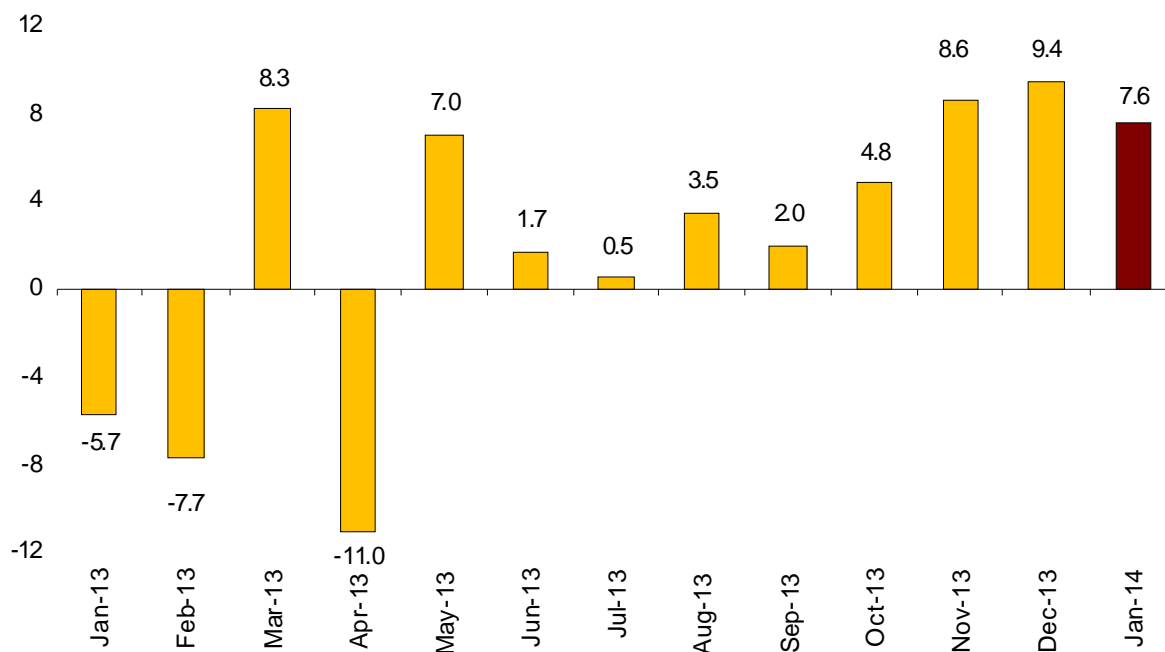
**Overnight stays in hotel establishments increase 7.6% in January  
as compared with the same month of 2013**

**Hotels earn 30.3 euros per available room and invoice an average of  
69.4 euros per occupied room**

In January, a total of 12.7 million overnight stays were registered in hotel establishments, indicating an increase of 7.6% as compared with the same month of 2013. Overnight stays for residents in Spain increased 0.7%, and those of non-residents did so by 11.8%.

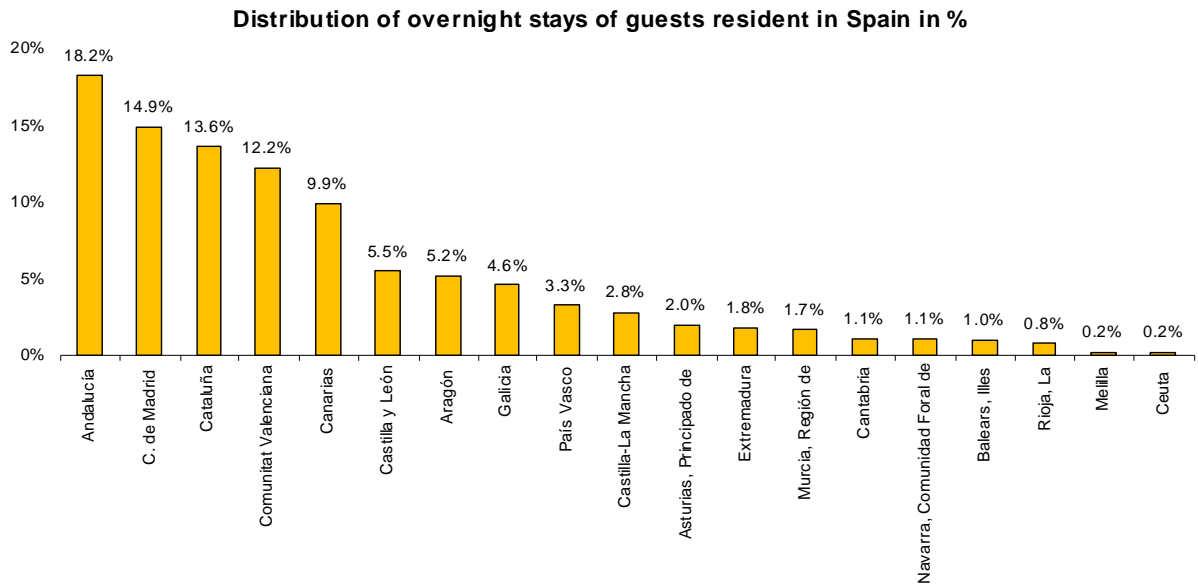
The average stay increased 1.1%, as compared with January 2013, standing at 3.3 nights per guest.

**Annual rates of overnight stays in %**

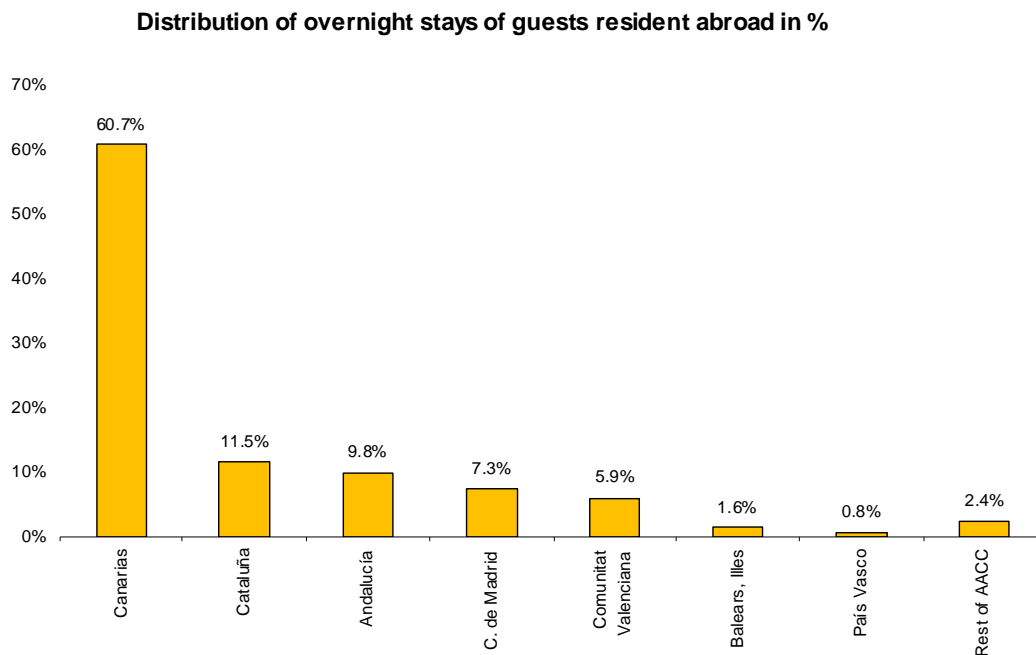


**Main destinations**

In January, Andalucía, Comunidad de Madrid, Cataluña and Comunitat Valenciana were the main destinations of guests resident in Spain, with variation rates for overnight stays of 7.9%, 5.6%, 5.6% and -4.1%, respectively.



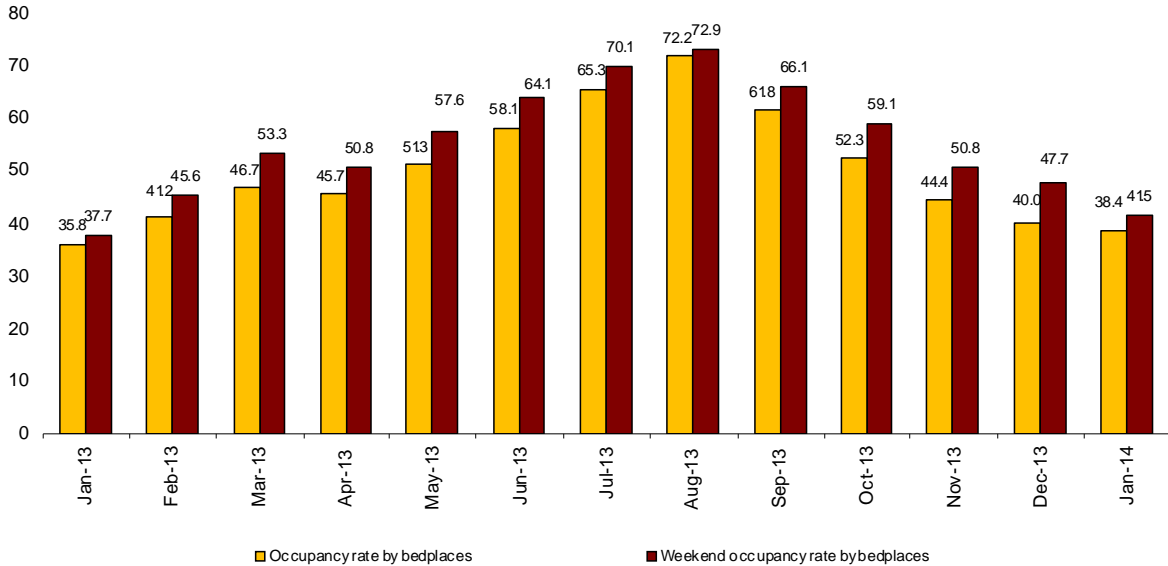
The main destination chosen by non-residents was Canarias, with a 60.7% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 14.0%, as compared with January 2013. Followed by Cataluña (11.5% of the total) and Andalucía (9.8%), where overnight stays increased 11.9% and 13.3%, respectively.



## Hotel Occupancy

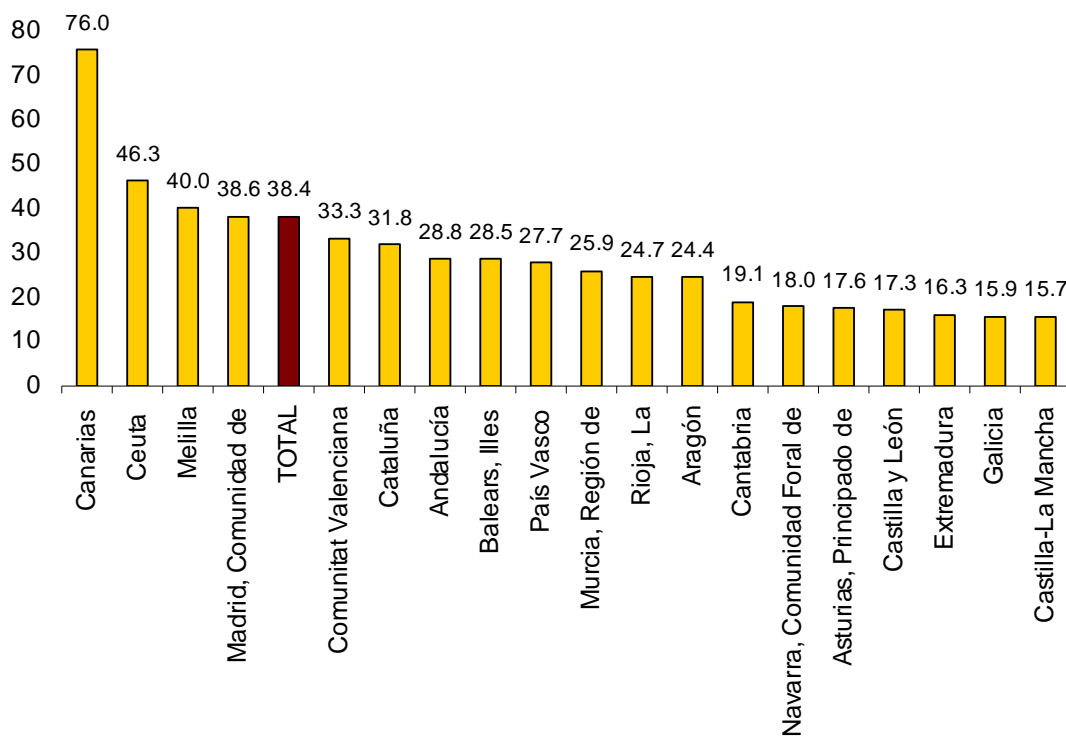
In terms of occupancy, 38.4% of the available bedplaces were occupied in January, with an annual increase of 7.4%. The weekend occupancy rate by bedplaces increased 10.1% and stood at 41.5%.

**Occupancy rate and weekend occupancy rate by bedplaces**



Canarias registered the greatest occupancy rate by bedplaces in January (76.0%), followed by Comunidad de Madrid (38.6%) and Cataluña (33.3%).

**Occupancy rate by bedplaces by Autonomous Community**



By tourist areas, the South of Tenerife registered both the highest occupancy rate by bedplaces (80.9% in January) and the highest weekend occupancy rate (81.3%). The island of Tenerife registered the highest number of overnight stays, with more than 2.1 million.

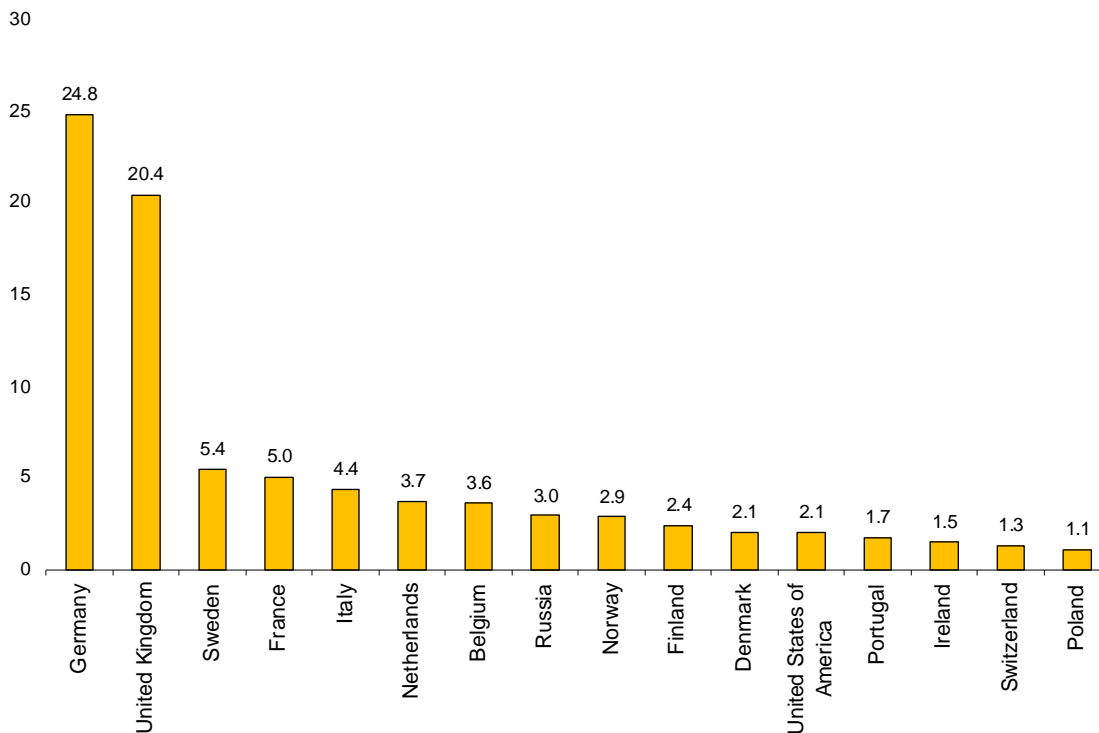
The tourist sites with the highest number of overnight stays were Madrid, San Bartolomé de Tirajana and Barcelona. Puerto de la Cruz reached both the highest occupancy rate by bedplaces (86.7%) as well as the highest weekend occupancy (84.0%).

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

Guests from Germany and the United Kingdom concentrated 24.8% and 20.4%, respectively, of the total of overnight stays by non-residents in January. The German market experienced a 12.6% increase and the British market increased 5.9%.

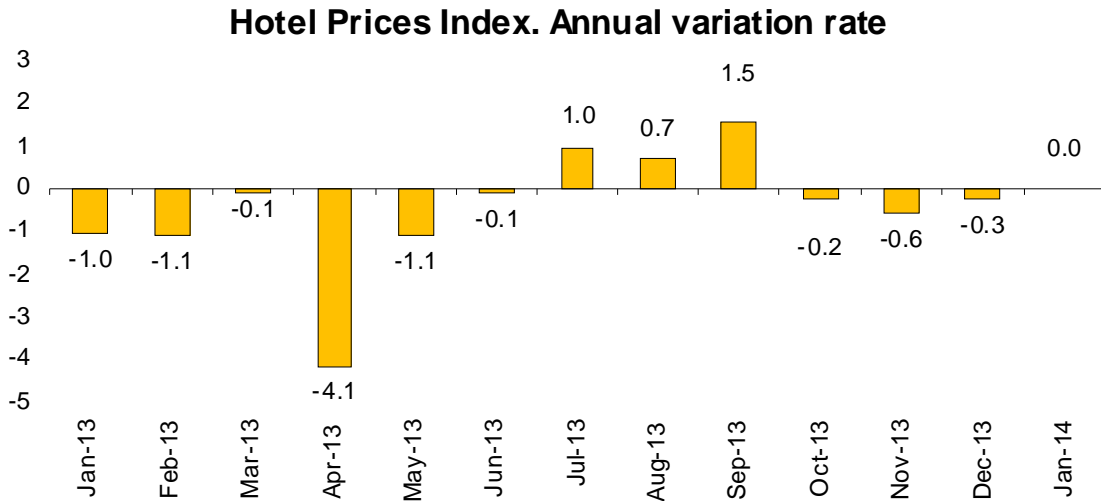
Overnight stays of guests from Sweden France and Italy (the following countries of origin) registered annual rates of 7.9%, 4.5% and 7.8%, respectively.

**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 0.0% in January, that is, 0.3 points higher than in the previous month and 1.0 points more than that registered in 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 January (together they represented 78.8% of the total weight). Hotel prices increased 2.7% in the annual rate in Canarias. In Cataluña they registered a 2.0% decrease, in Comunidad de Madrid they decreased by 4.0% and in Andalucía they did so by 0.5%.

By hotel category, the decreases in hotel prices were registered in one-silver-star hotels (-3.4%), in two-golden-stars hotels (-27%), in one-golden-star hotels (-0.9%), and in four-golden-star hotels (-0.6%).

The remaining categories registered positive annual rates: five-golden-stars establishments (2.3%), three and two-silver-star establishment (1.3%) and three-golden-stars hotels (0.5%).

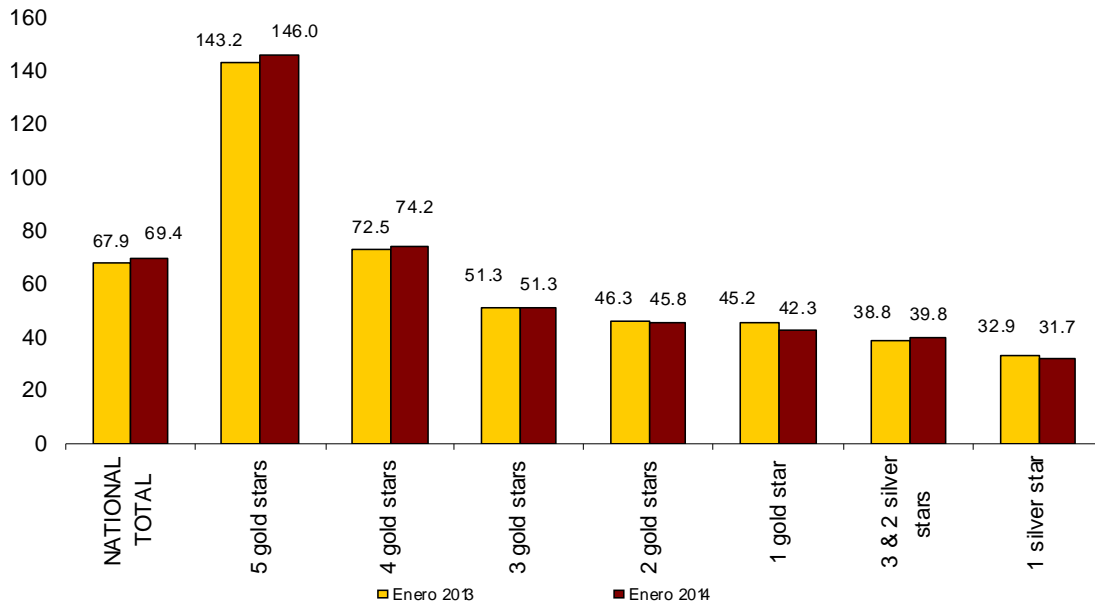
## Indicators on the Profitability of the Hotel Sector

The average invoicing per occupied room (ADR) in January was 69.4 euros, which represents an increase of 2.1% as compared with the same month of 2013.

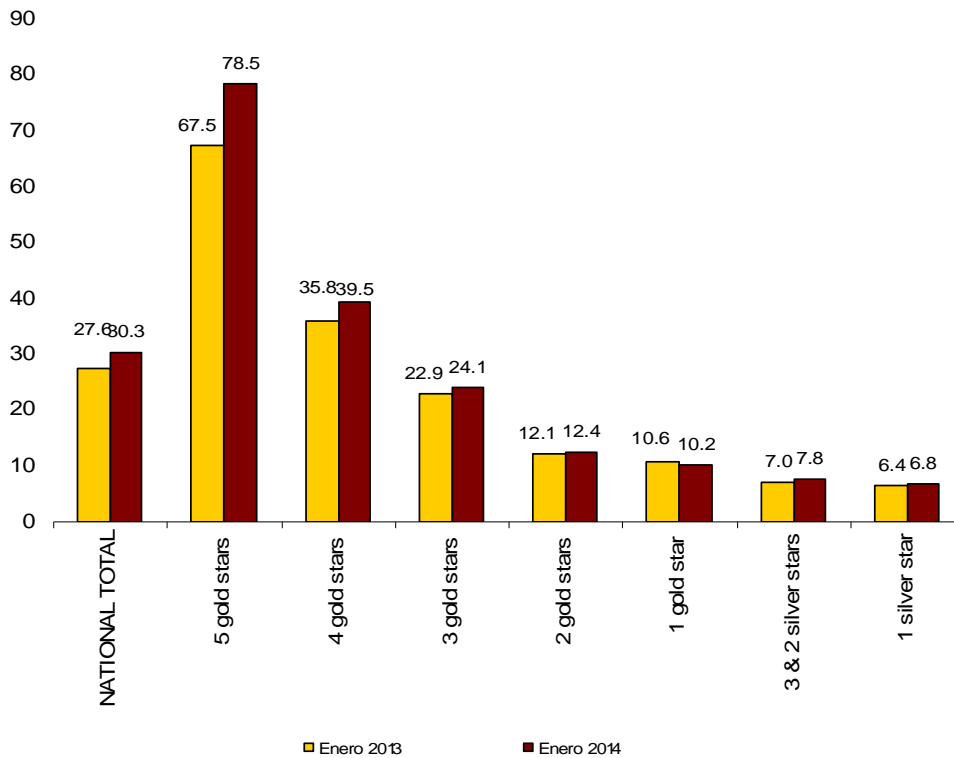
In turn, the average daily income per available room (RevPAR), that was conditioned by the occupancy registered in hotel establishments, reached 30.3 euros, with an increase of 9.9%.

By category, the average invoicing was 146.0 euros for five-star hotels, 74.2 euros for four-star hotels and 51.3 euros for three-star hotels. Income per available room for the same categories was 78.5, 39.5 and 24.1 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)

January 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	
<b>TOTAL</b>	<b>3,934,347</b>	<b>2,176,853</b>	<b>1,757,494</b>	<b>12,793,773</b>	<b>4,501,023</b>	<b>8,292,750</b>	<b>3.25</b>
HOTELS: Golden stars							
Five	266,783	91,181	175,601	1,003,497	192,229	811,268	3.76
Four	1,917,425	978,850	938,575	6,799,964	1,908,684	4,891,279	3.55
Three	1,012,417	601,054	411,363	3,351,509	1,373,118	1,978,391	3.31
Two	279,857	198,479	81,378	616,359	368,833	247,526	2.20
One	110,400	79,959	30,441	242,474	154,189	88,285	2.20
INNS: Silver stars							
Two and three	187,036	137,694	49,341	371,306	260,190	111,115	1.99
One	160,430	89,635	70,795	408,665	243,779	164,886	2.55
Annual rate	6.49	3.29	10.74	7.63	0.74	11.78	1.06
Cumulative annual rate	6.49	3.29	10.74	7.63	0.74	11.78	1.06

### 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	
<b>TOTAL</b>	<b>12,328</b>	<b>1,065,285</b>	<b>38.43</b>	<b>41.53</b>	<b>43.74</b>	<b>132,884</b>
HOTELS: Golden stars						
Five	217	70,070	45.75	47.91	54.05	20,286
Four	1,655	469,403	46.28	49.05	53.16	65,791
Three	1,848	256,574	41.82	45.58	47.34	27,484
Two	1,527	84,273	23.55	28.69	27.10	6,426
One	932	38,175	20.40	23.10	24.64	2,809
INNS: Silver stars						
Two and three	2,663	75,515	15.83	18.79	19.63	5,243
One	3,485	71,274	18.47	20.23	23.08	4,845
Annual rate	-1.16	0.03	7.38	10.09	7.41	-0.23

### 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	16,124	177,483	96,617	1,593,284	80.91	81.32	91.36	8.73	12,372
Sur de Gran Canaria	12,334	141,726	79,764	1,286,100	80.41	78.14	91.81	8.87	9,796
Isla de Tenerife	39,510	223,330	193,937	1,992,461	80.26	79.84	89.68	8.32	15,697
Isla de Gran Canaria	28,671	163,505	127,302	1,379,373	78.83	78.02	90.46	7.84	10,760
Isla de La Gomera	1,893	6,637	3,649	37,303	76.53	70.19	83.55	4.80	359
Isla de Lanzarote	14,181	73,397	89,827	697,859	74.73	72.24	86.15	8.99	5,146
Isla de Fuerteventura	4,628	87,677	22,385	873,174	67.52	67.12	76.98	9.70	6,668
Isla de La Palma	2,160	5,786	5,659	49,001	44.42	45.29	49.70	6.88	429

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

Barcelona	107,788	281,976	190,806	752,886	39.22	43.23	45.75	2.42	12,184
Costa Blanca	99,962	63,550	357,746	365,050	42.25	44.94	45.24	4.42	5,999
Costa del Sol	70,091	92,378	224,607	430,575	40.26	42.71	47.10	4.03	6,241
Costa Brava	41,204	27,042	105,068	59,766	28.50	36.14	30.94	2.42	1,650
Isla de Mallorca	13,366	22,045	26,266	125,736	28.32	30.19	34.80	4.29	2,394
Pirineo Aragonés	43,033	3,685	122,662	8,364	35.98	49.49	33.78	2.80	1,102
Palma - Calvià	12,445	19,348	24,672	99,197	28.83	31.25	36.38	3.90	1,955
Costa de Almería	24,648	6,020	68,193	33,603	21.93	21.75	33.17	3.32	986

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

Puerto de La Cruz	11,044	32,118	63,773	338,528	86.69	84.04	92.24	9.32	2,501
Arona	3,210	52,969	22,043	477,288	83.68	81.51	92.69	8.89	3,208
Mogán	1,304	37,874	8,023	342,179	82.97	81.58	94.53	8.94	1,964
Adeje	7,219	92,426	51,058	858,628	81.52	82.00	92.18	9.13	6,873
San Bartolomé de Tirajana	11,110	104,312	72,537	945,673	79.90	77.35	91.21	8.82	7,827
Yaiza	6,212	33,888	47,188	330,888	76.76	73.60	86.59	9.43	2,670
Tías	1,753	21,816	11,625	208,654	75.06	72.75	87.36	9.35	1,316
Pájara	1,529	54,726	8,185	588,990	70.72	69.69	78.27	10.62	4,436
Teguise	3,682	15,626	23,277	144,805	70.37	70.52	86.74	8.71	1,026
Palmas de Gran Canaria (Las)	13,673	18,947	40,589	83,782	67.04	77.73	83.77	3.81	812

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

Madrid	314,746	240,186	537,744	554,689	42.94	48.89	52.95	1.97	11,676
Barcelona	101,028	272,163	176,649	727,742	39.75	44.35	45.51	2.42	11,760
Benidorm	52,398	30,867	266,577	264,421	53.21	55.04	54.70	6.38	3,541
Sevilla	58,949	46,226	101,478	98,287	32.61	38.44	37.11	1.90	2,786
Granada	63,173	36,520	113,049	65,180	40.77	54.72	40.45	1.79	1,519
Torremolinos	13,662	17,762	59,725	115,519	52.84	52.49	56.90	5.58	1,064
Valencia	44,229	36,283	76,249	80,980	29.35	32.61	36.74	1.95	1,906
Fuengirola	11,486	9,730	65,653	77,233	51.72	56.88	56.47	6.73	897
Palma	13,192	19,045	25,404	90,029	28.71	31.61	36.50	3.58	1,814
Málaga	25,262	28,779	43,832	68,407	37.24	40.80	45.39	2.08	1,164

\* 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	%
<b>TOTAL</b>	<b>3,934,347</b>	<b>100.00</b>	<b>12,793,773</b>	<b>100.00</b>
Residents in Spain	2,176,853	55.33	4,501,023	35.18
Residents abroad	1,757,494	44.67	8,292,750	64.82
Total Residents abroad	1,757,494	100.00	8,292,750	100.00
Total Residents in E.U. (without Spain)	1,150,017	65.44	6,565,386	79.17
- Germany	252,490	14.37	2,056,658	24.80
- Austria	12,871	0.73	81,369	0.98
- Belgium	47,154	2.68	294,290	3.55
- Denmark	29,087	1.66	175,976	2.12
- Finland	31,578	1.80	196,887	2.37
- France	143,870	8.19	416,104	5.02
- Greece	3,504	0.20	10,126	0.12
- Ireland	23,311	1.33	121,154	1.46
- Italy	97,763	5.56	360,338	4.35
- Luxembourg	2,716	0.15	20,099	0.24
- Netherlands	58,380	3.32	304,758	3.67
- Poland	20,222	1.15	92,808	1.12
- Portugal	50,192	2.86	139,984	1.69
- United Kingdom	264,402	15.04	1,690,003	20.38
- Czech Republic	5,449	0.31	23,098	0.28
- Sweden	67,160	3.82	445,177	5.37
- Other EU countries*	39,870	2.27	136,557	1.65
Norway	35,737	2.03	241,670	2.91
Russia	59,046	3.36	249,630	3.01
Switzerland	24,409	1.39	111,458	1.34
Rest of Europe	41,401	2.36	132,903	1.60
Japan	50,664	2.88	82,585	1.00
United States of America	66,676	3.79	169,870	2.05
Rest of America	126,396	7.19	318,954	3.85
Africa	37,544	2.14	89,558	1.08
Other countries	165,604	9.42	330,734	3.99

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

## Hotel Price Index (HPI). 2008 Base

January 2014

Provisional data

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

	Index	Annual growth rate
<b>TOTAL</b>	<b>89.3</b>	<b>0.0</b>
Andalucía	89.0	-0.5
Aragón	76.0	0.5
Asturias, Principado de	81.3	-2.7
Baleares, Illes	99.4	0.0
Canarias	101.4	2.7
Cantabria	90.1	-2.5
Castilla y León	86.0	-2.2
Castilla - La Mancha	84.6	-4.1
Cataluña	79.4	-2.0
Comunitat Valenciana	87.4	0.2
Extremadura	80.9	-0.8
Galicia	87.2	-3.7
Madrid, Comunidad de	75.5	-4.0
Murcia, Región de	74.4	-1.5
Navarra, Comunidad Foral de	77.4	-3.2
País Vasco	84.5	-2.8
Rioja, La	85.9	0.3
Ceuta	101.1	2.0
Melilla	89.8	2.4

### National General Index and breakdown by categories

	Index	Annual growth rate
<b>TOTAL</b>	<b>89.3</b>	<b>0.0</b>
<b>HOTELS: Gold stars</b>		
Five	88.5	2.3
Fourth	88.9	-0.6
Three	88.7	0.5
Two	86.9	-2.7
One	94.0	-0.9
<b>HOSTALS: Silver stars</b>		
Three and two	89.5	1.3
One	94.6	-3.4

## Indicators on the Profitability of the Hotel Sector

January 2014

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>69.4</b>	<b>2.1</b>	<b>30.3</b>	<b>9.9</b>
Andalucía	58.2	-0.6	19.8	9.8
Aragón	55.5	0.7	14.8	6.1
Asturias, Principado de	49.7	-1.2	10.9	15.1
Balears, Illes	62.5	9.5	22.5	-16.5
Canarias	81.2	6.0	70.0	17.0
Cantabria	55.5	-4.1	11.3	7.3
Castilla y León	49.7	1.6	10.1	0.8
Castilla - La Mancha	50.5	-5.6	10.0	1.3
Cataluña	75.5	-4.6	27.9	0.3
Comunitat Valenciana	48.6	0.2	18.2	3.1
Extremadura	50.0	0.2	9.5	4.8
Galicia	45.5	-2.6	8.6	-7.3
Madrid, Comunidad de	71.9	-3.8	34.9	6.7
Murcia, Región de	54.7	6.4	18.2	15.9
Navarra, Comunidad Foral de	57.0	1.4	12.6	-5.7
País Vasco	61.3	-4.0	21.4	-3.8
Rioja, La	56.6	2.6	18.6	16.9
Ceuta	69.1	1.9	30.9	-8.3
Melilla	60.6	-0.8	32.5	20.5

### 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>69.4</b>	<b>2.1</b>	<b>30.3</b>	<b>9.9</b>
<b>HOTELS: Gold stars</b>				
Five	146.0	2.0	78.5	16.4
Four	74.2	2.4	39.5	10.2
Three	51.3	-0.1	24.1	5.4
Two	45.8	-1.1	12.4	2.5
One	42.3	-6.4	10.2	-4.1
<b>GUESTHOUSES: Silver stars</b>				
Three and two	39.8	2.6	7.8	11.1
One	31.7	-3.5	6.8	6.7

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