

24 March 2014

(Updated on 25 March 2014)

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

Overnight stays in hotel establishments increase 5.5% in February as compared with the same month of 2013

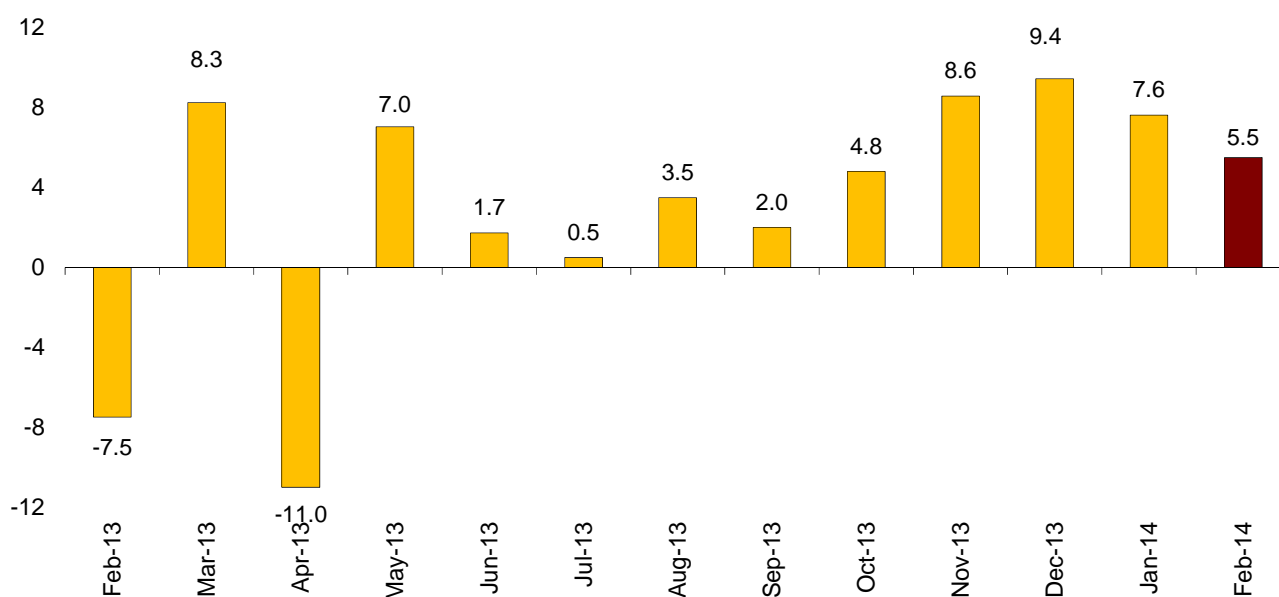
Hotels earn 35.6 euros per available room and invoice an average of 71.7 euros per occupied room

In February, a total of 13.8 million overnight stays were registered in hotel establishments, indicating an increase of 5.5% as compared with the same month of 2013. Overnight stays for residents in Spain increased 2.9%, and those of non-residents did so by 7.2%.

The average stay decreased 1.0%, as compared with February 2013, standing at 3.0 nights per guest.

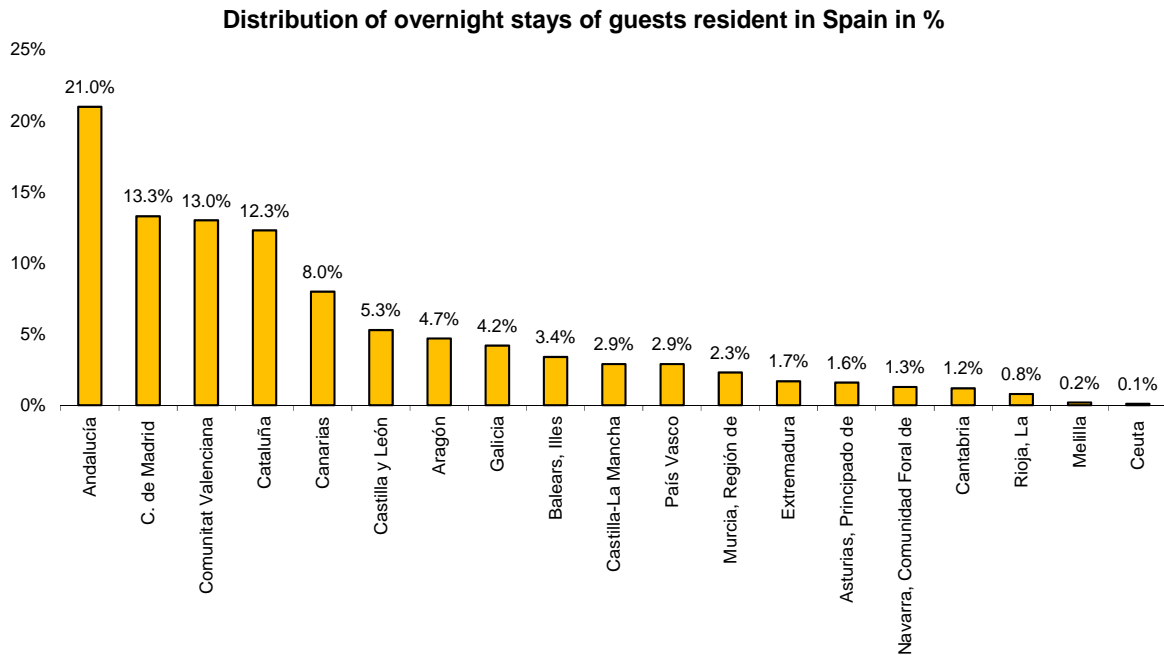
In the first two months of 2014, overnight stays increased 6.5% as compared with the same period of the previous year.

Annual rates of overnight stays in %

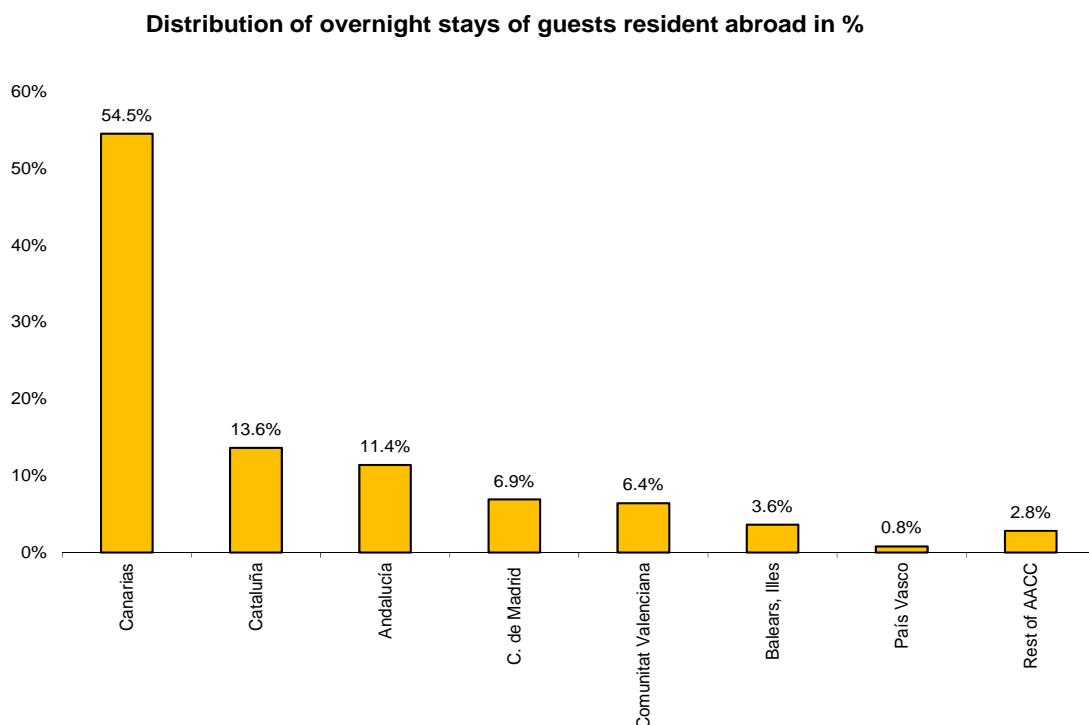


Main destinations

In February, Andalucía, Comunidad de Madrid, Comunitat Valenciana and Cataluña were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of 4.5%, 14.8%, -0.8% and 6.0%, respectively.



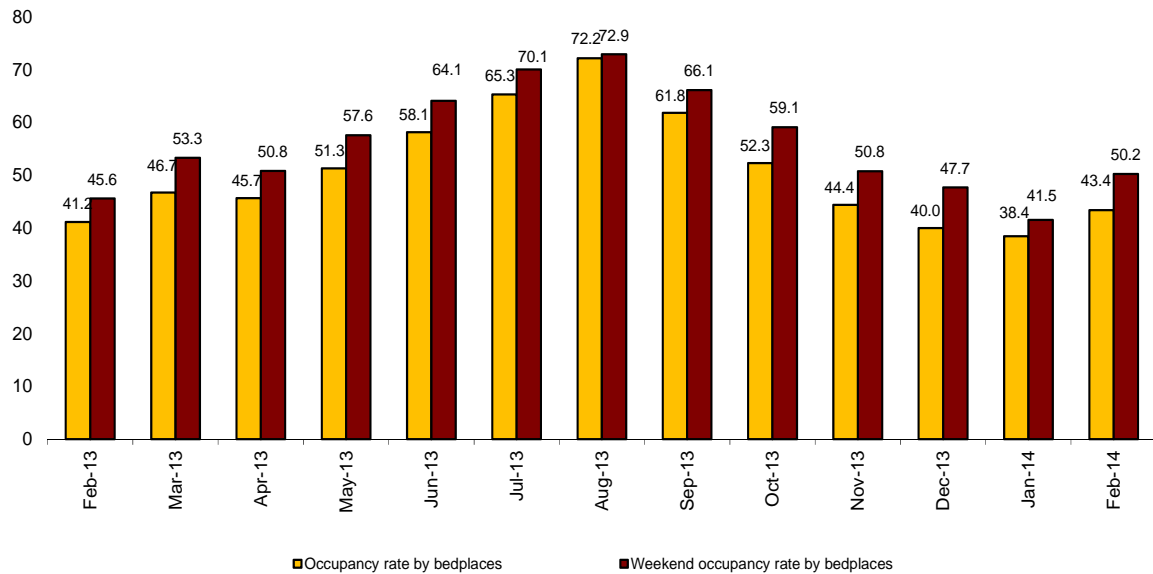
The main destination chosen by non-residents was Canarias, with a 54.5% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 11.8%, as compared with February 2013. Canarias was followed by Cataluña (13.6% of the total) and Andalucía (11.4%), where overnight stays of non-residents increased 5.3% and 5.1%, respectively.



Hotel Occupancy

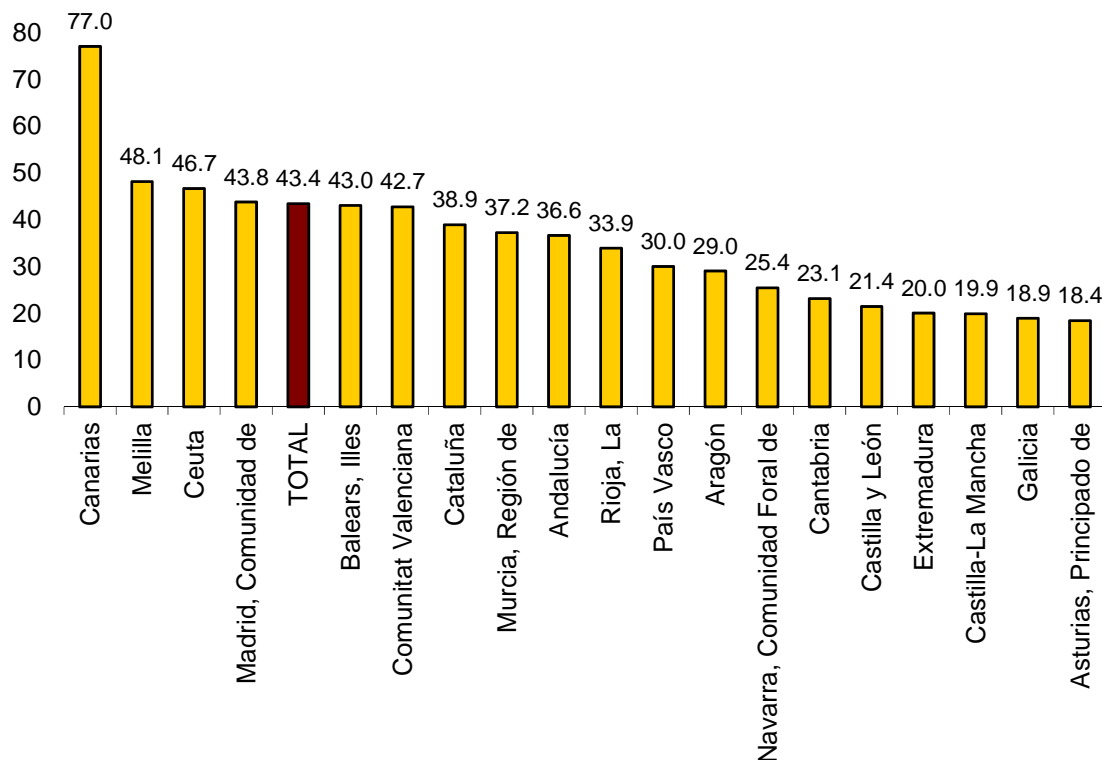
In terms of occupancy, 43.4% of the available bedplaces were occupied in February, with an annual increase of 5.4%. The weekend occupancy rate by bedplaces increased 10.1% and stood at 50.2%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the greatest occupancy rate by bedplaces in February (77.0%), followed by Comunidad de Madrid (43.8%) and Illes Balears (43.0%).

Occupancy rate by bedplaces by Autonomus Community



By tourist areas, the South of Tenerife registered the highest occupancy rate by bedplaces (82.3% in February). The highest weekend occupancy rate was registered both in the South of Tenerife and the island of Tenerife (81.8%). The island of Tenerife registered the highest number of overnight stays, with more than 2.0 million.

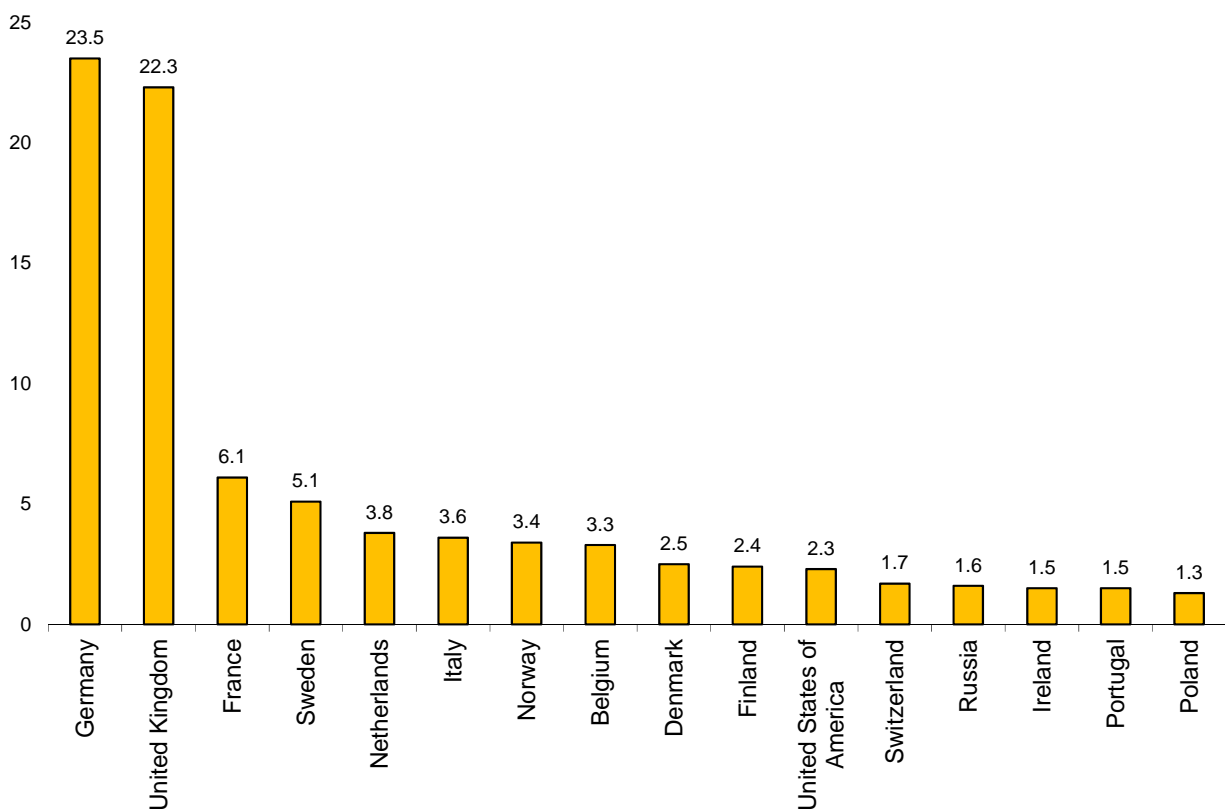
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Puerto de la Cruz reached the highest occupancy rate by bedplaces (87.9%) as well as the highest weekend occupancy (88.3%).

Overnight stays according to the country of origin of the guests

Guests from Germany and the United Kingdom concentrated 23.5% and 22.3%, respectively, of the total of overnight stays by non-residents in February. The German market experienced a 2.3% increase and the British market increased 12.8%.

Overnight stays of guests from France, Sweden and the Netherlands (the following countries of origin) registered annual rates of 11.0%, 5.6% and -5.2%, respectively.

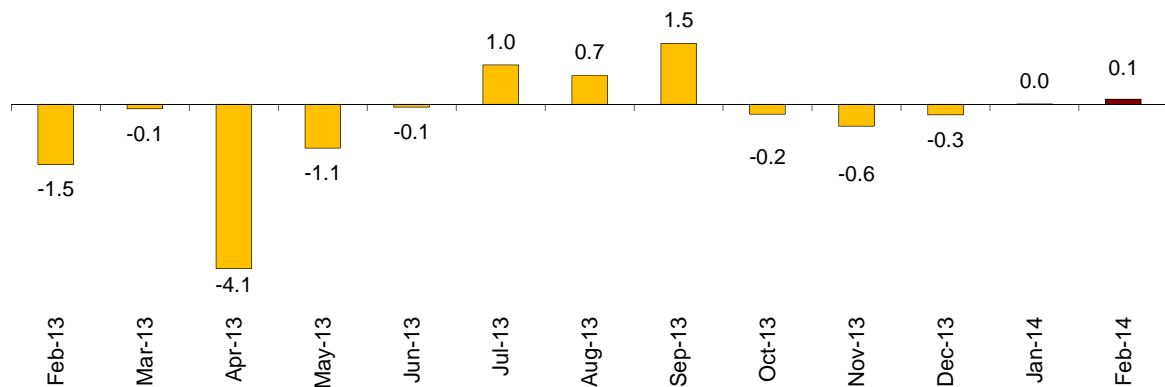
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 0.1% in February, that is, 0.1 points higher than in the previous month and 1.6 points higher 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 February (together they represented 76.5% of the total weight). Hotel prices increased 2.9% in the annual rate in Canarias and 1.7% in Cataluña. In Comunidad de Madrid, they decreased by 5.0% and in Andalucía they did so by 0.5%.

By hotel category, the decreases in hotel prices were registered in one-silver-star hotels (-3.9%), in two-golden-stars hotels (-1.5%), in three-golden-star hotels (-0.2%), and in five-golden-star hotels (-0.1%).

The remaining categories registered positive annual rates: three and two-silver-stars establishments (2.3%), one-golden-star establishments (1.4%) and four-golden-stars hotels (0.4%).

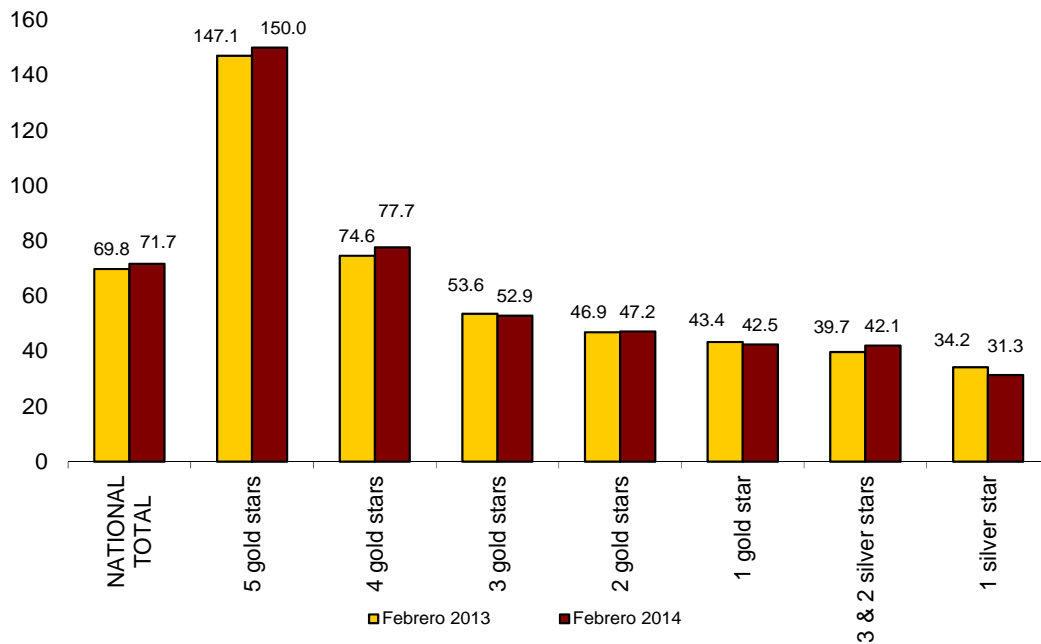
Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in February was 71.7 euros, which represented an increase of 2.6% as compared with the same month of 2013.

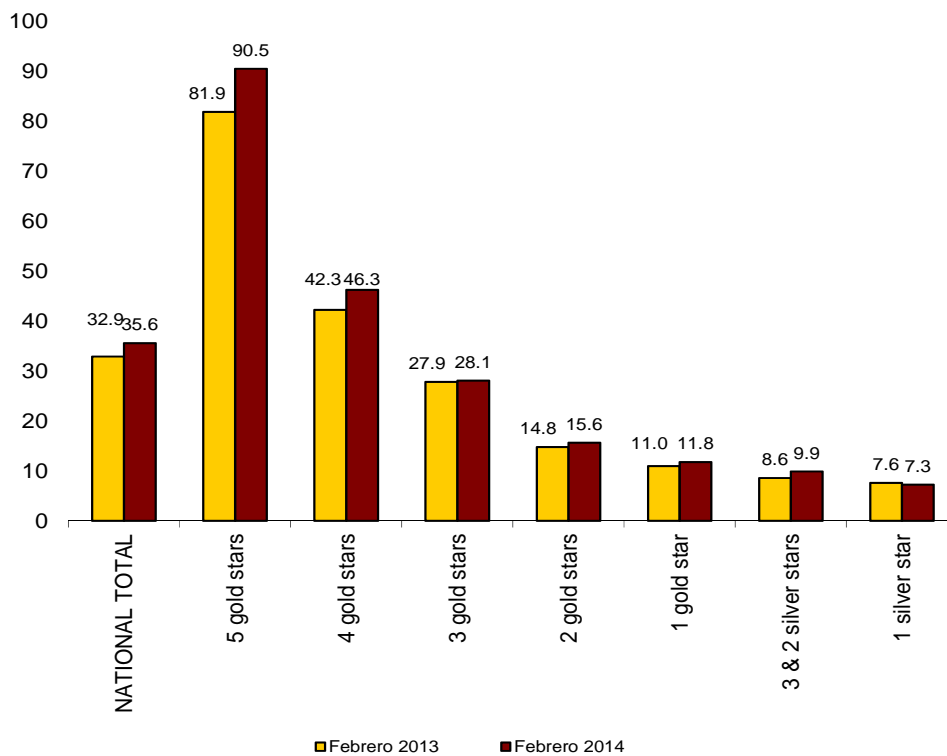
In turn, the revenue per available room (RevPAR), that was conditioned by the occupancy registered in hotel establishments, reached 35.6 euros, with an increase of 8.2%.

By category, the average invoicing was 150.0 euros for five-star hotels, 77.7 euros for four-star hotels and 52.9 euros for three-star hotels. Income per available room for the same categories was 90.5, 46.3 and 28.1 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)

February 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	4,630,713	2,717,038	1,913,675	13,823,820	5,430,606	8,393,214	2.99
HOTELS: Golden stars							
Five	304,351	110,265	194,087	1,024,292	203,001	821,291	3.37
Four	2,270,835	1,238,356	1,032,479	7,292,530	2,395,492	4,897,039	3.21
Three	1,225,469	788,152	437,317	3,713,787	1,720,418	1,993,369	3.03
Two	326,898	238,973	87,925	710,646	429,677	280,968	2.17
One	126,471	93,337	33,133	251,488	156,953	94,534	1.99
INNS: Silver stars							
Two and three	220,298	158,687	61,612	431,086	291,547	139,539	1.96
One	156,390	89,267	67,123	399,991	233,518	166,474	2.56
Annual rate	6.51	6.81	6.09	5.49	2.91	7.22	-0.96
Cumulative annual rate	6.50	5.21	8.27	6.51	1.91	9.44	0.00

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	12,741	1,128,845	43.39	50.22	49.77	138,497
HOTELS: Golden stars						
Five	228	71,541	50.69	54.97	60.45	20,691
Four	1,737	501,465	51.44	58.41	59.79	69,114
Three	2,001	279,400	47.17	55.00	53.37	29,326
Two	1,586	87,575	28.86	37.70	33.39	6,648
One	989	39,799	22.42	28.00	27.01	2,981
INNS: Silver stars						
Two and three	2,765	78,405	19.59	25.67	24.10	5,441
One	3,434	70,660	20.20	23.62	25.47	4,297
Annual rate	-1.53	-0.12	5.42	10.12	5.27	-1.14

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	18,856	180,839	103,481	1,449,597	82.26	81.81	91.45	7.78	12,378
Isla de Tenerife	49,878	222,209	229,711	1,785,833	81.82	81.81	90.99	7.41	15,732
Sur de Gran Canaria	12,683	134,958	68,419	1,184,878	81.72	78.39	90.00	8.49	9,791
Isla de Gran Canaria	28,907	155,691	104,197	1,273,328	80.11	77.81	89.02	7.46	10,753
Isla de Lanzarote	13,303	81,236	72,746	675,064	78.30	77.15	89.40	7.91	5,326
Isla de La Gomera	1,077	6,351	1,942	33,605	73.35	76.76	81.88	4.79	413
Isla de Fuerteventura	5,795	88,769	19,714	759,428	65.17	66.06	74.77	8.24	6,276
Val d'Aran	19,426	10,644	56,883	39,616	51.05	65.14	52.08	3.21	856

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

Barcelona	109,867	321,193	200,063	854,556	48.12	54.02	61.84	2.45	11,920
Costa del Sol	108,640	110,314	301,312	517,402	48.51	56.01	55.37	3.74	7,158
Costa Blanca	133,883	73,767	429,352	369,143	50.28	60.25	55.18	3.85	6,305
Isla de Mallorca	40,046	50,742	144,720	301,225	42.93	43.89	47.19	4.91	4,461
Palma - Calvià	30,496	37,690	105,568	218,422	42.51	43.69	48.24	4.75	3,240
Costa Brava	58,836	28,170	110,835	67,846	31.36	44.20	32.92	2.05	1,794
Costa de Almería	41,045	7,167	126,115	38,187	30.63	35.02	42.45	3.41	1,454
Costa de la Luz de Cádiz	47,355	15,891	78,196	61,294	23.16	34.27	29.96	2.21	1,880

Tourist site with a greater occupancy rate per month

Puerto de La Cruz	15,691	28,559	89,727	279,448	87.85	88.28	94.04	8.34	2,496
Mogán	1,213	35,298	5,944	313,390	85.03	82.11	94.53	8.75	1,964
Arona	4,354	53,922	26,958	429,780	84.90	83.75	93.08	7.84	3,138
Adeje	7,171	93,123	44,893	781,311	81.63	81.63	91.62	8.24	6,820
Yaiza	5,905	37,554	37,205	324,073	81.31	81.83	91.45	8.31	2,731
San Bartolomé de Tirajana	11,616	99,548	62,302	871,412	80.86	77.31	88.73	8.40	7,827
Tías	1,768	23,322	11,486	195,264	76.96	73.17	87.31	8.24	1,450
Teguise	3,110	18,522	17,579	145,302	75.53	74.07	90.42	7.53	1,020
Palmas de Gran Canaria (Las)	13,915	17,333	31,763	79,112	69.04	74.24	84.44	3.55	809
Pájara	1,477	54,715	6,507	500,531	66.78	67.89	75.51	9.02	4,138

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

Madrid	340,085	241,425	563,399	524,776	47.57	59.00	60.86	1.87	11,070
Barcelona	102,867	309,663	187,084	820,235	48.89	55.26	61.91	2.44	11,485
Benidorm	71,912	37,073	310,480	252,247	60.03	69.76	62.83	5.16	3,809
Torremolinos	23,070	24,735	78,502	155,418	56.61	64.32	60.31	4.89	1,479
Sevilla	73,159	49,471	115,796	105,588	41.04	56.84	46.60	1.81	2,784
Valencia	64,096	45,283	99,618	117,078	44.06	49.83	53.63	1.98	1,957
Palma	21,959	27,531	70,427	143,937	41.50	41.59	45.74	4.33	2,250
Granada	77,179	37,731	138,692	65,571	51.66	78.56	54.44	1.78	1,509
Málaga	36,006	31,929	65,757	69,851	49.64	62.78	60.69	2.00	1,172
Fuengirola	11,857	9,852	61,696	71,502	54.76	53.84	50.19	6.14	858

* 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	4,630,713	100.00	13,823,820	100.00
Residents in Spain	2,717,038	58.67	5,430,606	39.28
Residents abroad	1,913,675	41.33	8,393,214	60.72
Total Residents abroad	1,913,675	100.00	8,393,214	100.00
Total Residents in E.U. (without Spain)	1,328,634	69.43	6,723,656	80.11
- Germany	281,777	14.72	1,967,799	23.45
- Austria	19,112	1.00	105,813	1.26
- Belgium	47,512	2.48	279,102	3.33
- Denmark	35,063	1.83	207,764	2.48
- Finland	31,539	1.65	199,170	2.37
- France	183,086	9.57	512,617	6.11
- Greece	5,400	0.28	13,298	0.16
- Ireland	28,318	1.48	125,124	1.49
- Italy	100,148	5.23	304,940	3.63
- Luxembourg	3,566	0.19	20,376	0.24
- Netherlands	67,659	3.54	319,110	3.80
- Poland	23,930	1.25	112,568	1.34
- Portugal	58,814	3.07	124,227	1.48
- United Kingdom	333,326	17.42	1,868,252	22.26
- Czech Republic	5,351	0.28	18,899	0.23
- Sweden	66,151	3.46	431,677	5.14
- Other EU countries*	37,882	1.98	112,919	1.35
Norway	42,251	2.21	285,366	3.40
Russia	33,344	1.74	131,221	1.56
Switzerland	33,562	1.75	142,015	1.69
Rest of Europe	42,750	2.23	125,292	1.49
Japan	49,015	2.56	85,477	1.02
United States of America	74,216	3.88	194,661	2.32
Rest of America	105,235	5.50	259,601	3.09
Africa	36,165	1.89	79,766	0.95
Other countries	168,503	8.81	366,159	4.36

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

Hotel Price Index (HPI). 2008 Base

February 2014

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	87.4	0.1
Andalucía	88.4	-0.5
Aragón	74.8	0.0
Asturias, Principado de	78.2	-2.6
Balears, Illes	88.2	-5.6
Canarias	100.3	2.9
Cantabria	85.3	0.1
Castilla y León	86.0	-1.9
Castilla - La Mancha	85.3	-2.9
Cataluña	82.0	1.7
Comunitat Valenciana	84.2	-0.3
Extremadura	81.6	-1.4
Galicia	87.0	-1.3
Madrid, Comunidad de	71.8	-5.0
Murcia, Región de	74.6	-2.0
Navarra, Comunidad Foral de	78.6	-3.2
País Vasco	83.7	-4.0
Rioja, La	83.1	0.4
Ceuta	96.9	2.0
Melilla	92.2	1.6

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	87.4	0.1
HOTELS: Gold stars		
Five	82.6	-0.1
Fourth	87.3	0.4
Three	87.4	-0.2
Two	87.1	-1.5
One	96.5	1.4
HOSTALS: Silver stars		
Three and two	88.7	2.3
One	94.6	-3.9

Indicators on the Profitability of the Hotel Sector

February 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	71.7	2.7	35.6	8.2
Andalucía	58.0	3.1	24.4	3.3
Aragón	56.9	0.8	19.4	23.9
Asturias, Principado de	47.4	-7.4	11.5	-7.5
Balears, Illes	56.0	2.8	25.8	-13.3
Canarias	82.9	3.8	71.6	13.8
Cantabria	53.5	-4.6	13.3	0.8
Castilla y León	50.2	0.4	12.7	3.1
Castilla - La Mancha	51.9	-4.7	12.7	0.3
Cataluña	99.1	6.3	47.4	10.4
Comunitat Valenciana	49.3	-1.6	23.6	3.4
Extremadura	50.3	0.4	11.5	-6.9
Galicia	46.7	0.5	10.9	3.3
Madrid, Comunidad de	71.2	-7.1	40.2	1.5
Murcia, Región de	49.0	-1.2	21.0	6.4
Navarra, Comunidad Foral de	55.5	-0.4	16.4	12.6
País Vasco	62.7	-2.4	24.1	-7.3
Rioja, La	56.7	0.9	23.2	7.8
Ceuta	68.1	6.3	30.8	14.9
Melilla	60.7	-7.8	35.9	24.8

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	71.7	2.7	35.6	8.2
HOTELS: Gold stars				
Five	150.0	2.0	90.5	10.5
Four	77.7	4.1	46.3	9.5
Three	52.9	-1.4	28.1	0.8
Two	47.2	0.5	15.6	5.7
One	42.5	-2.0	11.8	7.4
GUESTHOUSES: Silver stars				
Three and two	42.1	6.0	9.9	15.6
One	31.3	-8.4	7.3	-4.5

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