

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
 February 2017. *Provisional data*

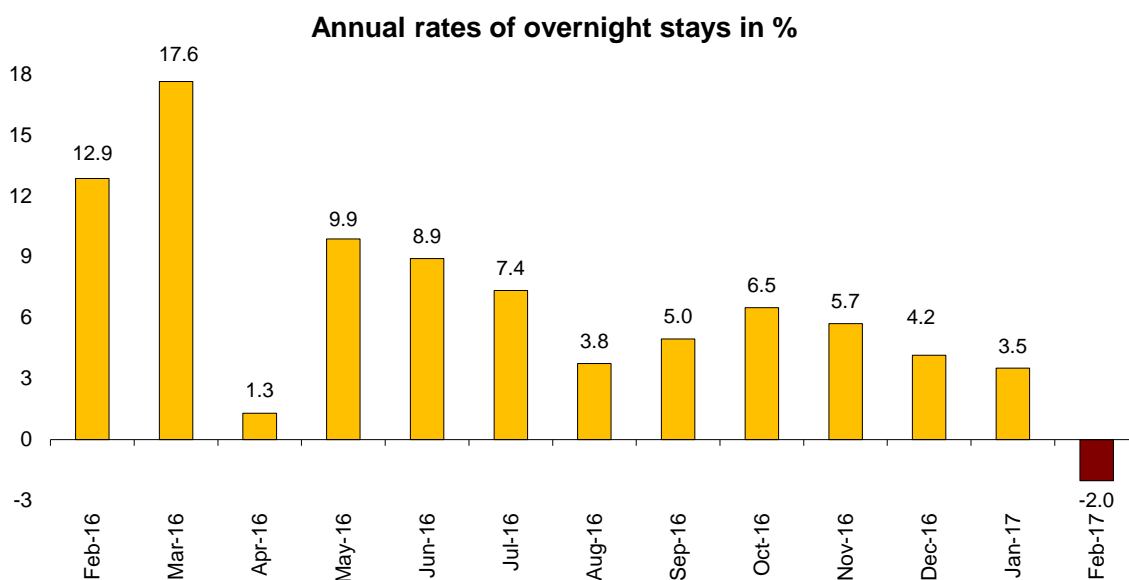
Overnight stays in hotel establishments decrease 2.0% in February with respect to the same month in 2016

Hotels invoice an average of 80.1 euros per occupied room, which is an annual increase of 3.6%

During the month of February 16.0 million overnight stays were registered in hotel establishments, representing a 2.0% decrease as compared to the same month of 2016. Overnight stays of travellers resident in Spain decreased 8.4%, and those of non-residents increased 2.1%.

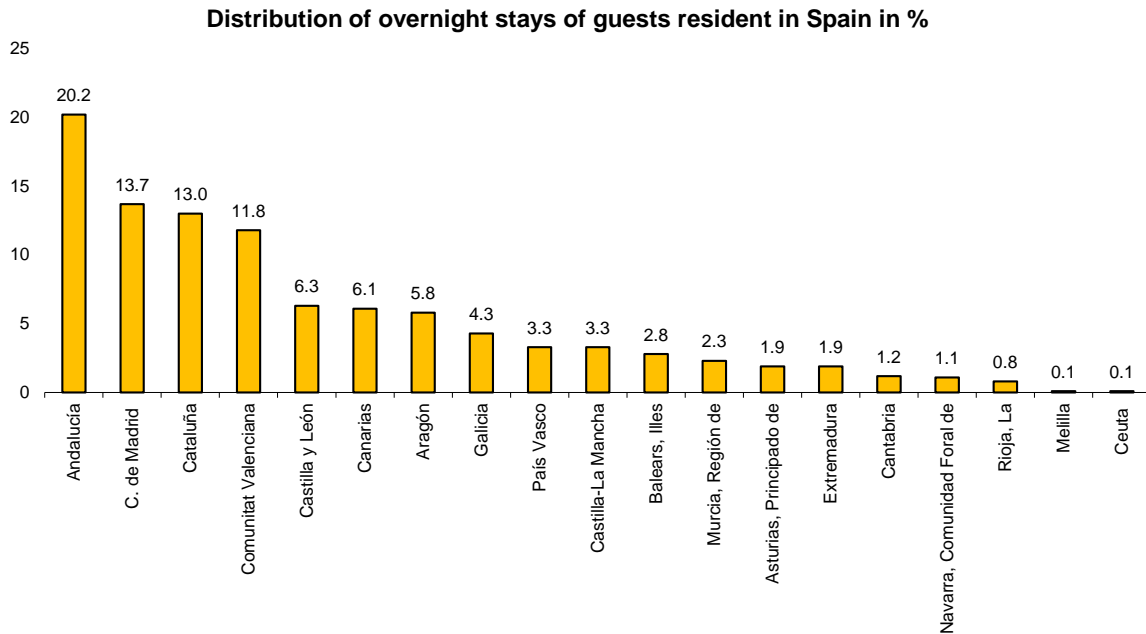
The average stay decrease 3.7% as compared to February 2016, standing at 2.8 nights per traveller.

During the first two months of 2017, overnight stays increased 0.6% with regard to the same period in the previous year.

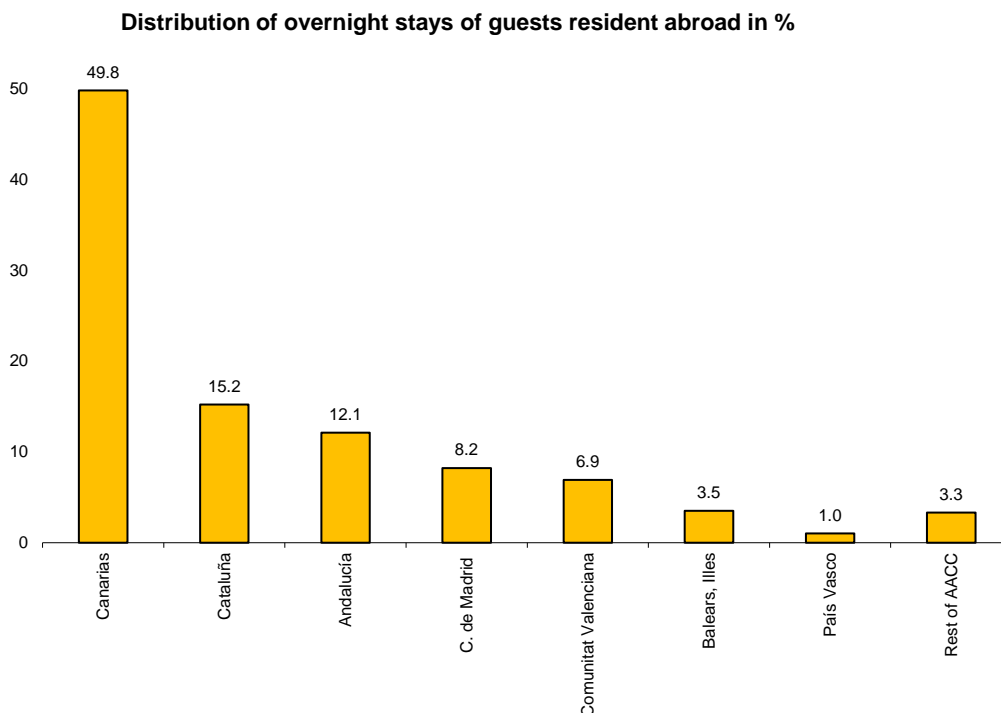


Main destinations

Andalucía, Comunidad de Madrid, Cataluña and Comunitat Valenciana were the main destinations of travellers resident in Spain in February, with interannual variation rates for overnight stays of -17.4%, -6.1%, -5.7% and -17.9%, respectively.



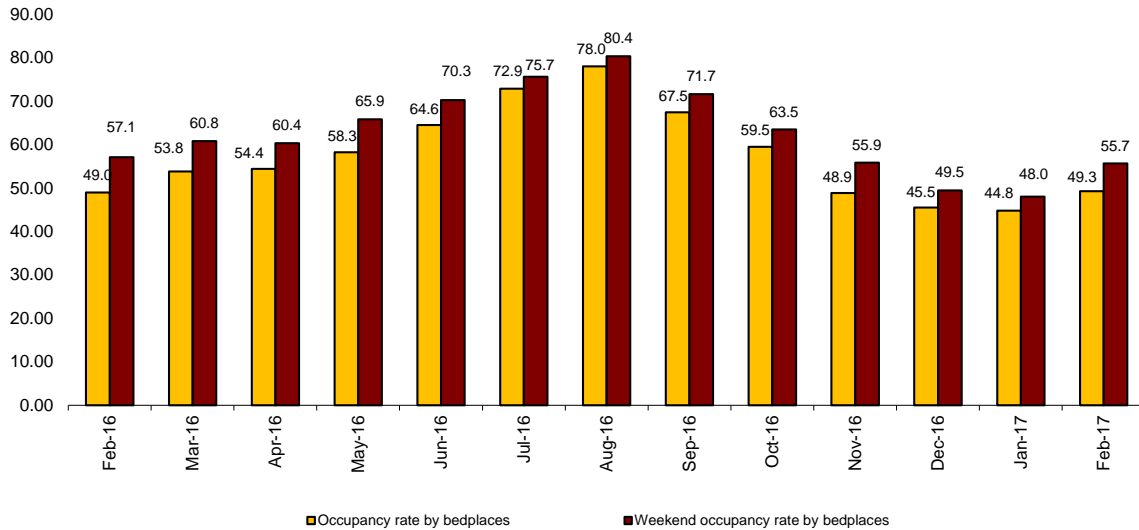
The main destination chosen by non-residents travellers was Canarias, with 49.8% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 0.5% as compared to February 2016. The following destinations of non-residents were Cataluña (15.2% of the total and an increase of 4.9% in overnight stays) and Andalucía (12.1% of the total and an increase of 5.4% in overnight stays).



Hotel Occupancy

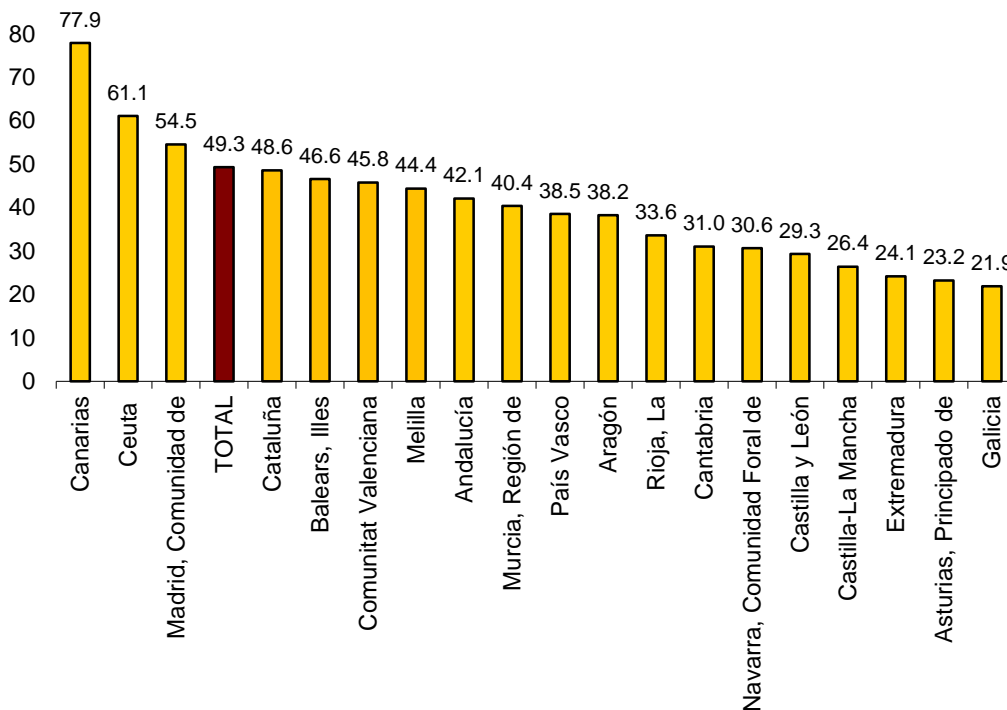
In February, 49.3% of the available bedplaces were occupied, indicating an annual increase of 0.6%. The weekend occupancy rate by bedplaces decreased by 2.5%, standing at 55.7%.

Occupancy rate and weekend occupancy rate by bedplaces



Canarias registered the highest occupancy rate by bedplaces in February (77.9%). It was followed by Comunidad de Madrid (54.5%) and Cataluña (48.6%).

Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the South of Gran Canaria registered the highest occupancy rate by bedplaces (83.7%), and the island of La Palma registered the highest weekend occupancy rate (85.0%). The tourist area of Barcelona registered the highest number of overnight stays, with more than 1.3 million.

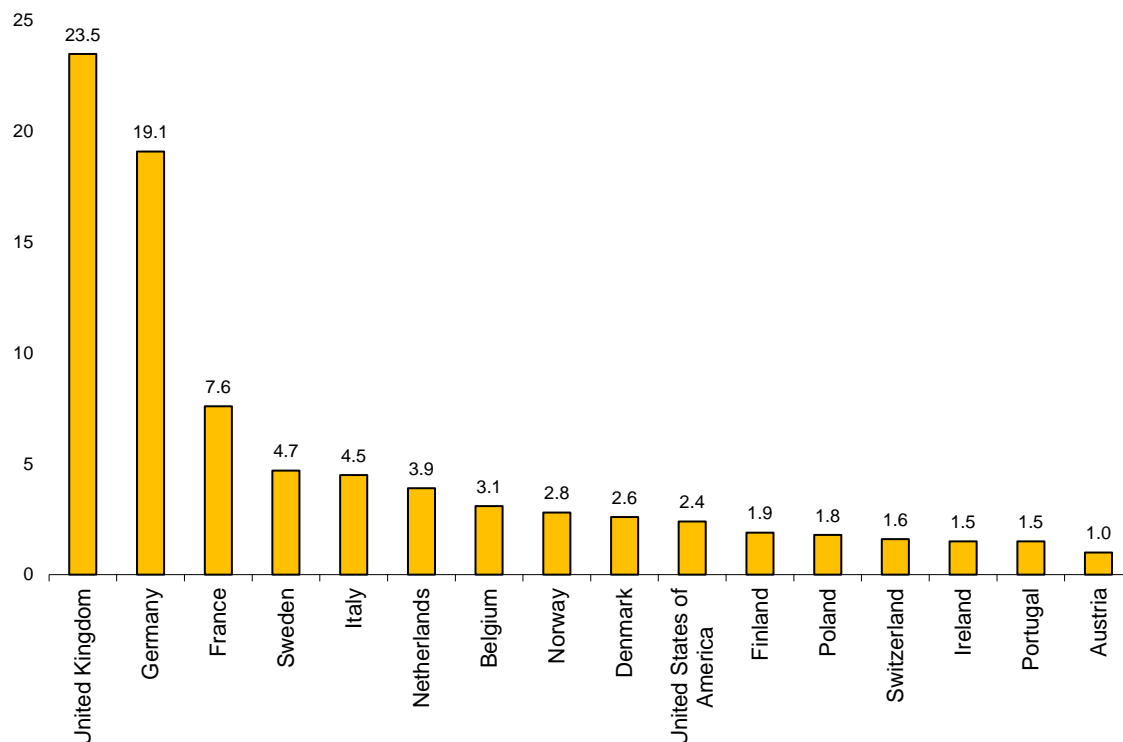
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and Benidorm. Arona reached the greatest level of occupancy by bedplaces (85.2%) and Benasque registered the greatest weekend occupancy (89.6%).

Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany concentrated 23.5% and 19.1%, respectively, of the total of overnight stays in hotel establishments by non-residents in February. The British market increased by 1.5%, while the German market decreased by 4.8%.

Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of 6.2%, -0.2% and 6.2%, respectively.

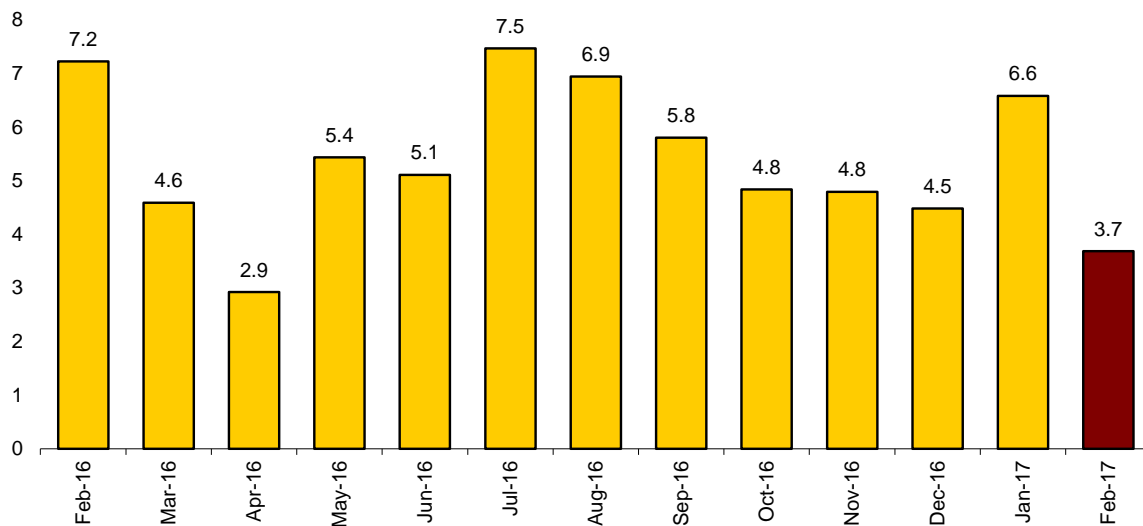
Distribution of overnight stays of residents abroad from the main 16 countries in %



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 3.7% in February, which is 2.9 points less than the last month and 3.5 points less than the figure registered 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 (they represented 78.0% of the total). Hotel prices increased 8.7% in the annual rate in Canarias, 2.4% in Comunidad de Madrid and 2.3% in Andalucía. However, they decreased 3.1% in Cataluña.

By hotel category, the increase in hotel prices were registered in three-golden-star establishments (4.9%), four-golden-star establishments (4.6%), two-golden-star establishments (3.2%), one-silver-star establishments (1.9%), three and two-silver-star establishments (1.4%) and five-gold-star establishments (0.6%).

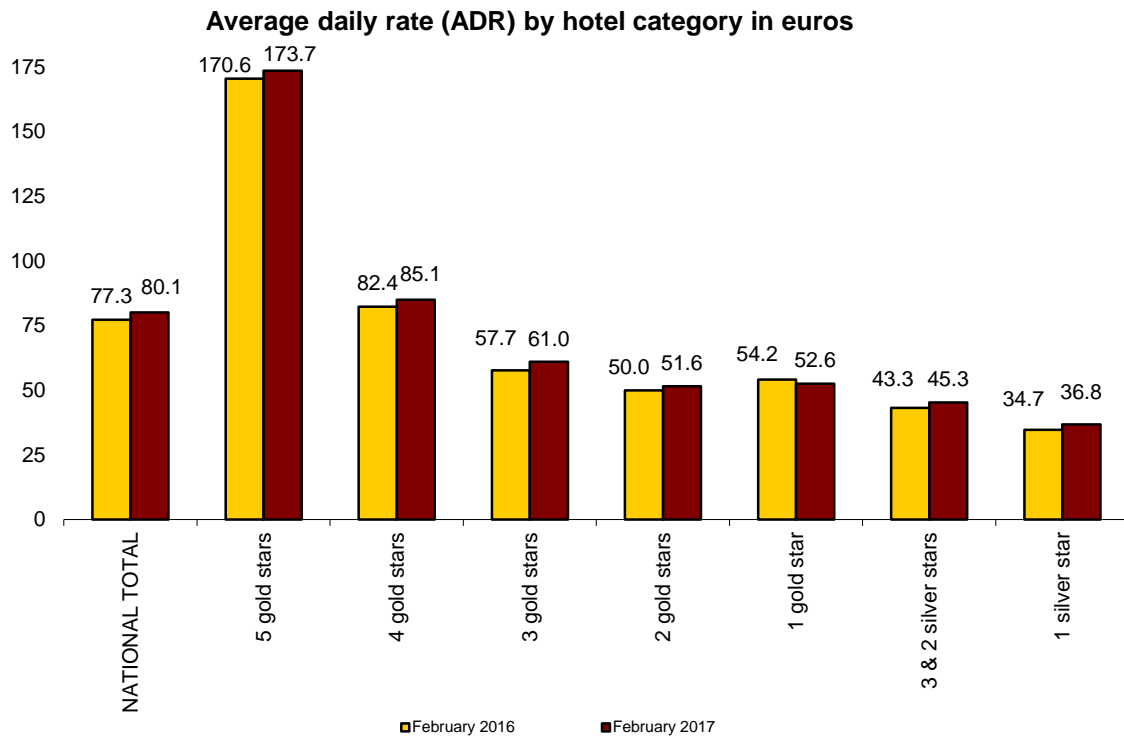
By contrast, in one-golden-star establishments the prices decreased (4.2%) in February.

Indicators on the Profitability of the Hotel Sector

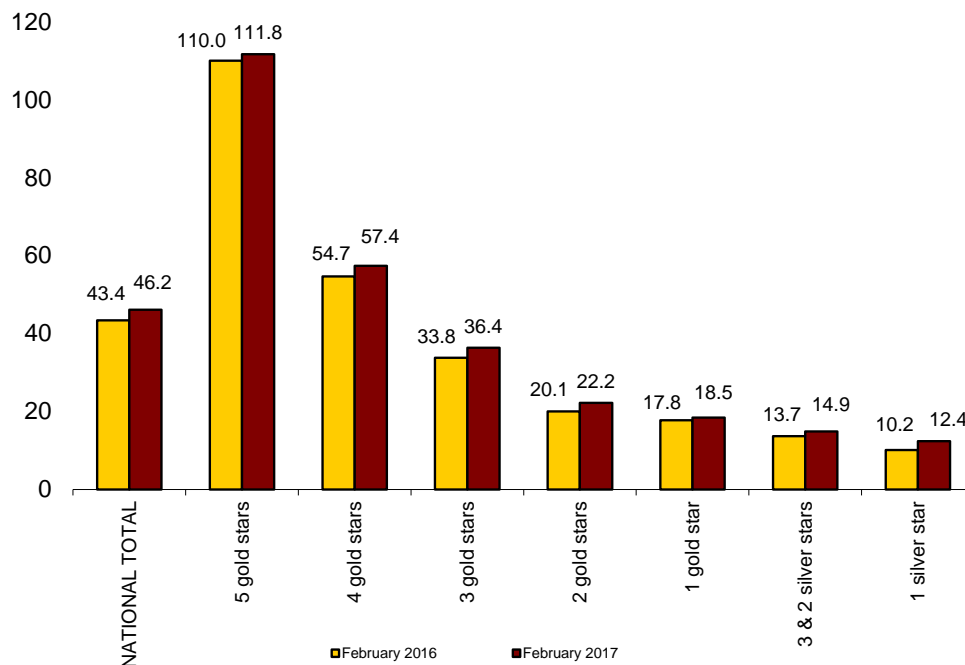
The daily average invoicing by hotels per occupied room (ADR) in February was 80.1 euros, indicating an increase of 3.6% as compared to the same month in 2016.

In turn, the daily average revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 46.2 euros, with an increase of 6.3%.

By category, the average invoicing was 173.7 euros for five-star hotels, 85.1 euros for four-star hotels and 61.0 euros for three-star hotels. Income per available room for these same categories was 111.8, 57.4 and 36.4 euros, respectively.



Revenue per available room (RevPAR) by hotel category in euros



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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

February 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	5,659,692	3,141,988	2,517,705	16,046,230	5,965,374	10,080,856	2.84
HOTELS: Golden stars							
Five	367,874	122,101	245,773	1,231,717	209,949	1,021,769	3.35
Four	2,777,849	1,432,355	1,345,493	8,463,058	2,668,722	5,794,336	3.05
Three	1,414,526	836,322	578,204	4,011,346	1,659,795	2,351,550	2.84
Two	415,656	286,943	128,714	893,235	512,503	380,733	2.15
One	169,180	114,764	54,415	335,821	196,394	139,427	1.98
INNS: Silver stars							
Two and three	288,802	203,079	85,723	568,285	374,346	193,938	1.97
One	225,806	146,423	79,382	542,767	343,665	199,102	2.40
Annual rate	1.76	-1.56	6.23	-2.04	-8.37	2.14	-3.73
Cumulative annual rate	3.63	-0.47	8.98	0.56	-7.35	5.56	-2.95

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	12,659	561,740	1,148,568	49.29	55.69	58.16	156,259
HOTELS: Golden stars							
Five	251	38,643	79,064	54.72	58.78	65.26	25,403
Four	1,869	250,460	528,307	56.47	62.60	68.07	77,462
Three	1,973	128,037	269,478	52.48	58.24	60.74	32,565
Two	1,542	44,181	85,722	36.87	46.66	43.14	7,029
One	976	21,177	40,602	29.42	37.82	35.33	3,280
INNS: Silver stars							
Two and three	2,683	40,678	76,395	26.45	35.33	32.35	5,573
One	3,366	38,564	69,001	28.00	33.53	35.03	4,947
Annual rate	-0.25	0.38	0.87	0.55	-2.49	2.41	5.53

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	10,431	160,033	62,173	1,325,862	83.70	82.43	92.13	8.14	11,140
Sur de Tenerife	15,853	188,143	82,006	1,475,300	82.59	82.20	89.65	7.63	14,114
Isla de Gran Canaria	28,225	183,360	101,551	1,421,182	82.47	81.82	91.56	7.20	12,200
Isla de Tenerife	41,920	231,883	171,582	1,813,611	81.17	81.06	89.04	7.25	17,525
Isla de La Gomera	1,075	6,788	2,242	38,842	81.02	82.61	88.16	5.22	406
Isla de La Palma	2,314	12,718	7,201	90,095	77.56	85.01	92.05	6.47	729
Isla de Lanzarote	11,141	99,040	46,649	743,769	75.77	76.49	87.24	7.17	6,326
Isla de Fuerteventura	9,516	116,266	31,568	906,170	67.83	66.01	77.84	7.46	8,006

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

Barcelona	145,831	413,435	242,970	1,119,538	59.05	63.41	73.51	2.44	13,901
Costa Blanca	136,532	101,552	402,027	487,488	55.10	61.50	61.50	3.74	7,262
Costa del Sol	102,248	139,156	241,258	608,711	50.81	54.73	63.30	3.52	7,983
Isla de Mallorca	41,493	66,363	140,754	344,250	48.41	47.54	56.72	4.50	5,807
Costa Barcelona	86,020	88,066	153,682	190,940	43.95	44.69	59.07	1.98	3,143
Palma - Calvià	26,243	42,663	88,724	216,225	47.80	45.97	57.49	4.43	3,643
Pirineo Aragonés	63,494	7,259	161,596	22,389	50.63	65.48	48.72	2.60	1,243
Costa Brava	46,848	43,019	80,205	100,505	33.05	41.23	40.62	2.01	2,057

Tourist site with a greater occupancy rate per month

Arona	3,724	54,617	23,849	448,418	85.18	83.97	91.32	8.09	3,308
San Bartolomé de Tirajana	9,028	116,722	46,909	970,223	84.30	83.54	92.68	8.09	8,795
Puerto de La Cruz	12,576	29,847	64,844	273,019	83.00	83.92	90.66	7.96	2,497
Mogán	1,349	43,033	15,252	356,606	82.35	79.80	90.72	8.38	2,341
Adeje	6,214	99,040	29,600	779,769	81.87	81.87	88.58	7.69	7,994
Benasque	9,757	1,706	31,341	6,654	77.45	89.57	72.34	3.31	256
Tías	2,001	28,837	9,512	211,145	76.51	82.61	87.97	7.16	1,520
Teguise	1,942	23,086	8,919	171,979	75.87	71.88	89.97	7.23	1,441
Yaiza	4,426	44,630	21,672	346,704	75.11	74.48	85.35	7.51	3,227
Naut Aran	9,954	6,960	37,765	32,323	73.91	81.17	71.97	4.14	601

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

Madrid	377,172	315,031	608,193	725,197	56.94	67.87	73.37	1.93	11,757
Barcelona	133,246	400,790	223,351	1,085,624	60.03	64.41	73.95	2.45	13,144
Benidorm	63,645	49,960	265,928	325,738	61.79	66.77	67.40	5.21	4,208
Pájara	3,805	68,848	16,299	565,843	68.82	67.37	76.45	8.01	5,001
Sevilla	95,972	84,579	142,747	183,163	53.17	65.66	65.39	1.81	3,429
Valencia	70,590	57,016	105,715	141,127	47.13	53.43	62.87	1.93	2,107
Granada	73,865	50,962	129,652	87,109	55.66	77.19	60.64	1.74	1,630
Palma	19,837	30,922	51,072	150,755	48.63	45.08	58.78	3.98	2,489
Torremolinos	20,734	17,417	69,258	115,754	62.80	66.96	68.46	4.85	1,149
Antigua	2,544	23,240	8,721	156,947	71.24	68.21	85.65	6.43	1,202

* 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	5,659,692	100.00	16,046,230	100.00
Residents in Spain	3,141,988	55.52	5,965,374	37.18
Residents abroad	2,517,705	44.48	10,080,856	62.82
Total Residents abroad	2,517,705	100.00	10,080,856	100.00
Total Residents in E.U. (without Spain)	1,707,635	67.83	7,960,172	78.96
- Germany	298,202	11.84	1,921,667	19.06
- Austria	20,101	0.80	98,359	0.98
- Belgium	63,428	2.52	315,196	3.13
- Denmark	43,470	1.73	259,793	2.58
- Finland	33,440	1.33	195,262	1.94
- France	262,785	10.44	760,813	7.55
- Greece	7,130	0.28	18,932	0.19
- Ireland	35,812	1.42	153,989	1.53
- Italy	146,652	5.82	453,809	4.50
- Luxembourg	3,542	0.14	20,333	0.20
- Netherlands	89,236	3.54	391,940	3.89
- Poland	37,643	1.50	178,726	1.77
- Portugal	75,979	3.02	151,522	1.50
- United Kingdom	450,172	17.88	2,368,990	23.50
- Czech Republic	8,059	0.32	34,264	0.34
- Sweden	77,244	3.07	476,431	4.73
- Other EU countries*	54,739	2.17	160,145	1.59
Norway	42,402	1.68	277,143	2.75
Russia	29,207	1.16	95,562	0.95
Switzerland	43,967	1.75	162,859	1.62
Rest of Europe	55,149	2.19	164,682	1.63
Japan	49,924	1.98	90,004	0.89
United States of America	97,954	3.89	245,386	2.43
Rest of America	167,023	6.63	418,124	4.15
Africa	49,453	1.96	109,720	1.09
Other countries	274,989	10.92	557,206	5.53

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

Hotel Price Index (HPI). 2008 Base

February 2017

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	98.6	3.7
Andalucía	97.7	2.3
Aragón	82.3	3.5
Asturias, Principado de	81.0	0.7
Balears, Illes	100.5	-0.6
Canarias	120.9	8.7
Cantabria	87.5	-0.4
Castilla y León	90.7	2.1
Castilla - La Mancha	89.0	1.6
Cataluña	86.0	-3.1
Comunitat Valenciana	96.2	7.0
Extremadura	85.5	0.1
Galicia	89.6	-0.6
Madrid, Comunidad de	80.8	2.4
Murcia, Región de	82.5	2.9
Navarra, Comunidad Foral de	81.0	2.5
País Vasco	89.3	5.3
Rioja, La	86.8	-1.2
Ceuta	86.0	-2.8
Melilla	92.5	0.1

National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	98.6	3.7
HOTELS: Gold stars		
Five	90.9	0.6
Fourth	99.4	4.6
Three	100.6	4.9
Two	95.5	3.2
One	104.5	-4.2
HOSTALS: Silver stars		
Three and two	93.0	1.4
One	100.4	1.9

Indicators on the Profitability of the Hotel Sector

February 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	80.1	3.6	46.2	6.3
Andalucía	64.5	7.4	33.2	6.6
Aragón	59.8	2.3	25.7	7.6
Asturias, Principado de	53.0	4.1	16.2	2.8
Balears, Illes	67.7	3.7	34.2	2.4
Canarias	100.0	6.9	87.6	6.6
Cantabria	55.8	-1.0	19.1	8.4
Castilla y León	52.9	4.6	18.4	16.6
Castilla - La Mancha	52.7	1.0	17.0	9.0
Cataluña	99.4	-5.9	59.5	1.3
Comunitat Valenciana	56.7	7.8	30.3	5.0
Extremadura	55.1	0.8	15.8	2.6
Galicia	49.3	-2.8	13.6	-2.0
Madrid, Comunidad de	80.9	2.9	56.5	10.7
Murcia, Región de	55.7	9.3	27.0	4.9
Navarra, Comunidad Foral de	58.5	3.5	22.3	3.0
País Vasco	66.6	1.2	35.5	13.9
Rioja, La	59.1	0.9	24.4	-6.9
Ceuta	64.4	-1.7	42.3	13.6
Melilla	68.8	2.7	40.3	-10.4

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

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	80.1	3.6	46.2	6.3
HOTELS: Gold stars				
Five	173.7	1.8	111.8	1.6
Four	85.1	3.3	57.4	5.0
Three	61.0	5.7	36.4	7.6
Two	51.6	3.3	22.2	10.9
One	52.6	-3.1	18.5	3.7
GUESTHOUSES: Silver stars				
Three and two	45.3	4.7	14.9	8.7
One	36.8	6.0	12.4	21.6

(*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room