

23 April 2014

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

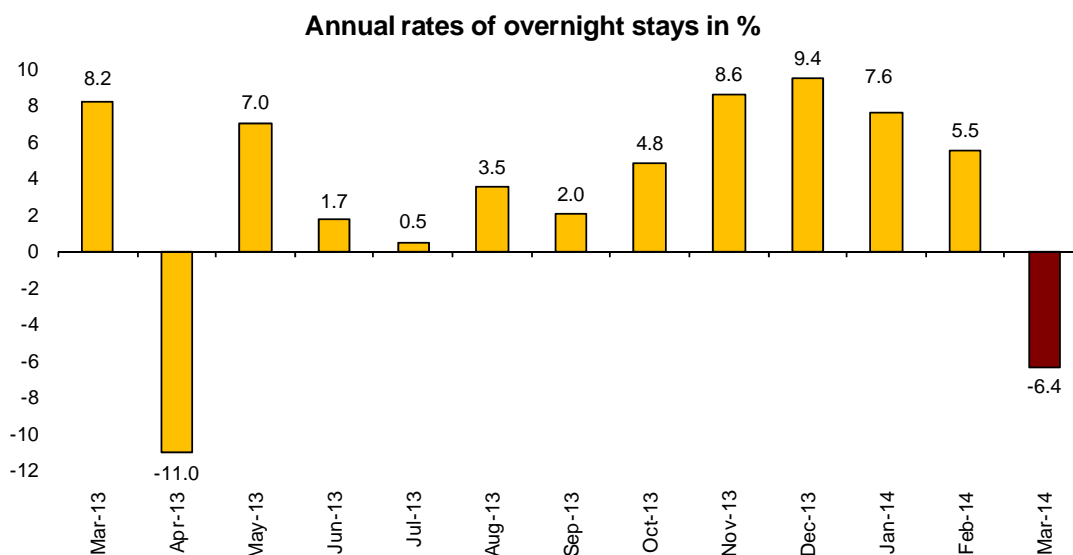
**17.6 million overnight stays in hotel establishments<sup>1</sup> were registered in March, that is, a 6.4% decrease as compared with the same month of 2013**

**Hotels earn 35.8 euros per available room and invoice an average of 68.3 euros per occupied room**

In March, a total of 17.6 million overnight stays were registered in hotel establishments, indicating a decrease of 6.4% as compared with the same month of 2013. Overnight stays for residents in Spain decreased 16.2%, whereas those of non-residents increased by 1.4%. The average stay increased 1.1%, as compared with March 2013, standing at 3.1 nights per guest.

In the first quarter of 2014, overnight stays increased 1.0% as compared with the same period of the previous year.

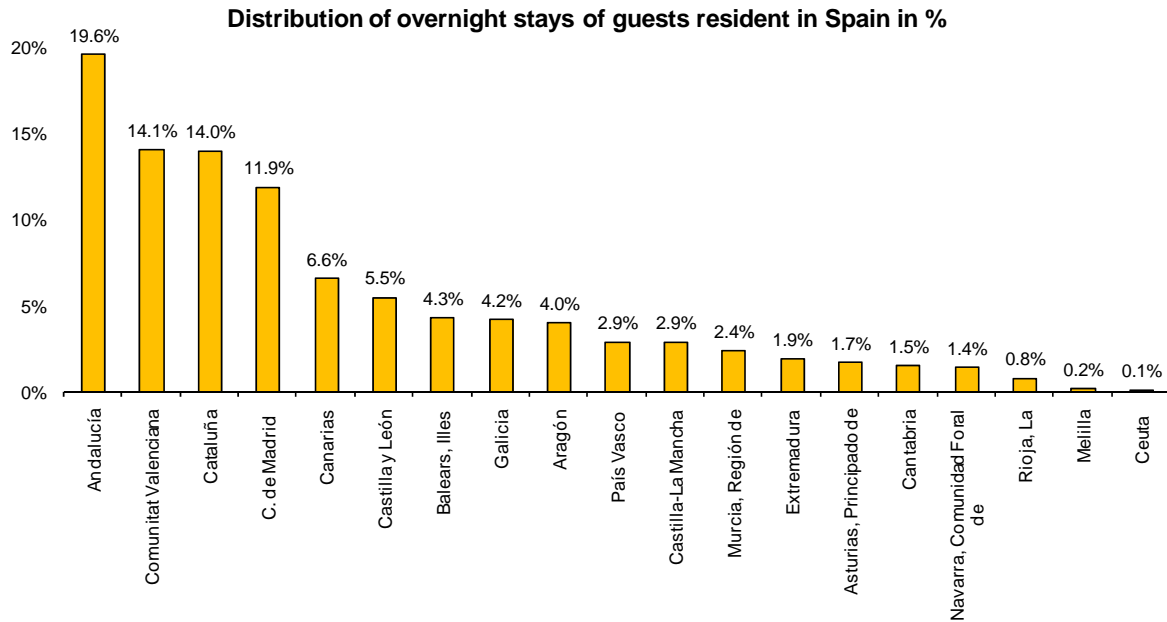
Worth noting the fact that, since Easter holidays took place in April this year, and in 2013 they took place in March, it is desirable to wait for the data of this survey in April, since then it will be possible to analyse the data of both months together and, thus, to do a better analysis of the annual variation rates.



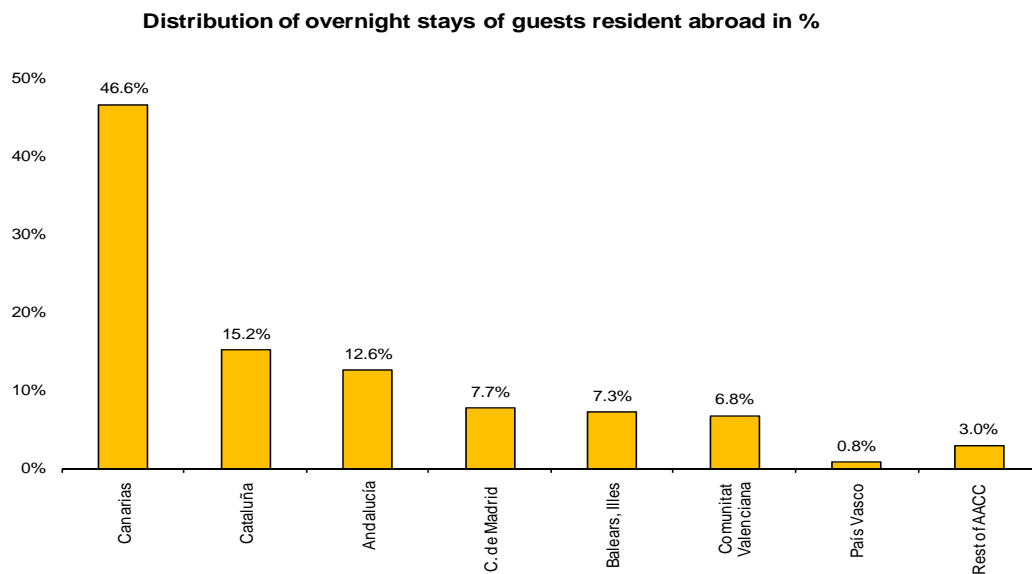
<sup>1</sup> Since in 2014 Easter holidays took place in April, and in 2013 they took place in March, it is desirable to wait for the data of this survey in April, since then it will be possible to analyse the data of both months together and, thus, to do a better analysis of the annual variation rates.

**Main destinations<sup>1</sup>**

In March, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with annual variation rates for overnight stays of -18.1%, -20.2%, -15.2% and 12.2%, respectively.

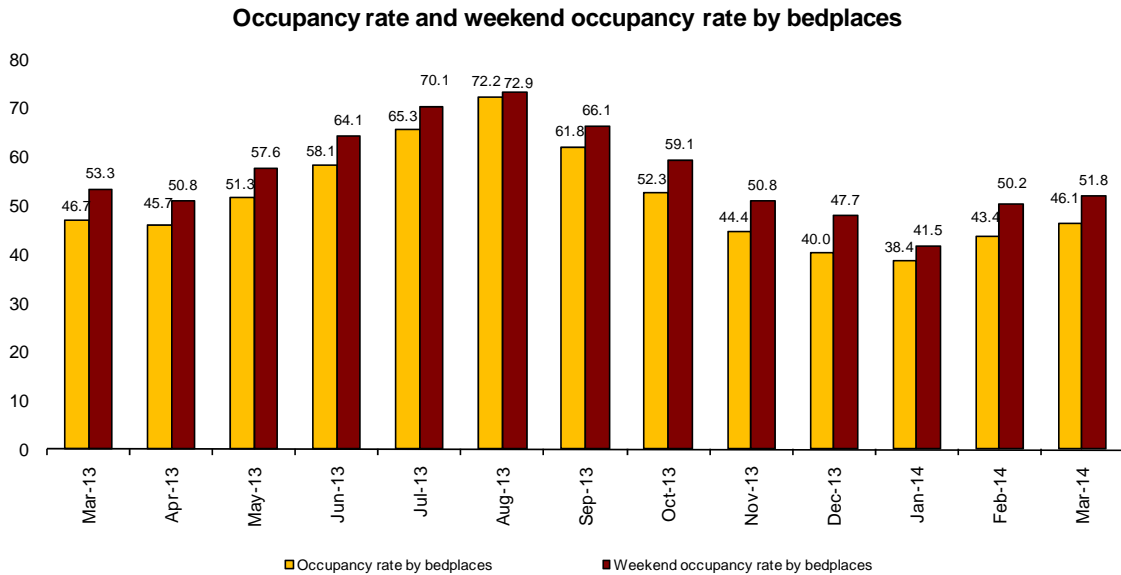


The main destination chosen by non-residents was Canarias, with 46.6% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals increased 10.1%, as compared with March 2013. Canarias was followed by Cataluña (15.2% of the total) and Andalucía (12.6%), where overnight stays of non-residents decreased 2.2% and 2.6%, respectively.



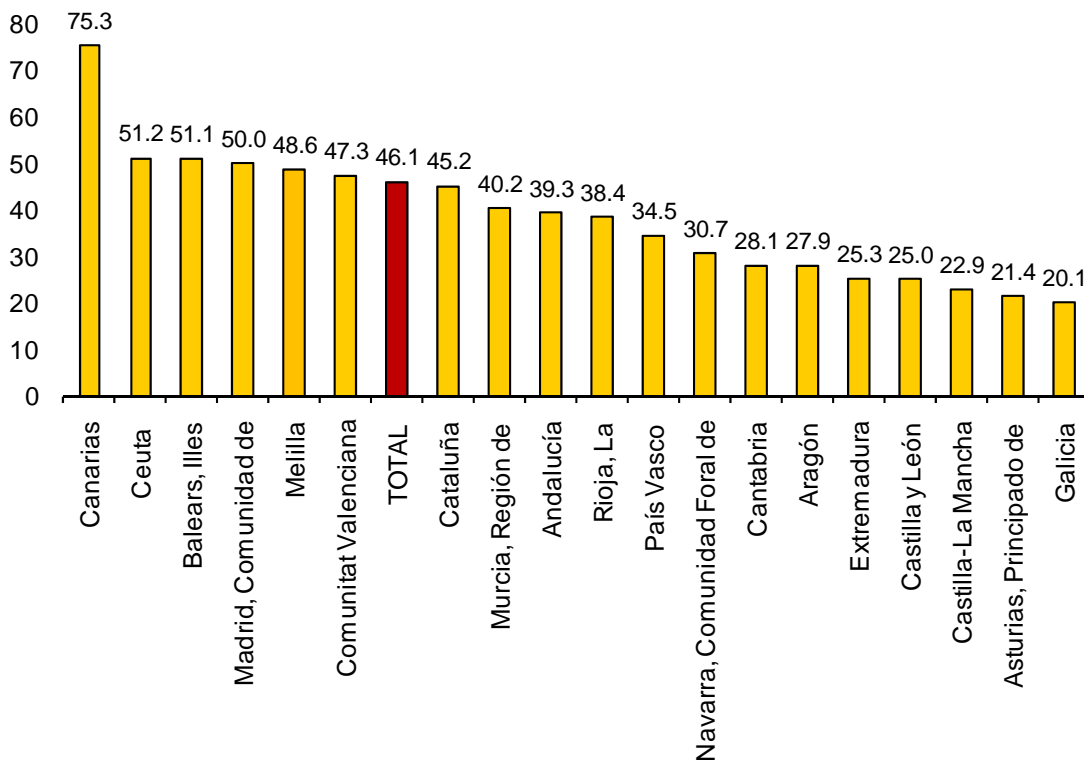
### Hotel Occupancy<sup>1</sup>

In terms of occupancy, 46.1% of the available bedplaces were occupied in March, with an annual decrease of 1.2%. The weekend occupancy rate by bedplaces decreased 2.9% and stood at 51.8%.



Canarias registered the greatest occupancy rate by bedplaces in March (75.3%), followed by Illes Balears (51.1%) and Comunidad de Madrid (50.0%).

### Occupancy rate by bedplaces by Autonomous Community



By tourist areas, the South of Tenerife registered both the highest occupancy rate by bedplaces (79.2% in March) and the highest weekend occupancy rate (78.1%). The island of Tenerife registered the highest number of overnight stays as well, with more than 2.1 million.

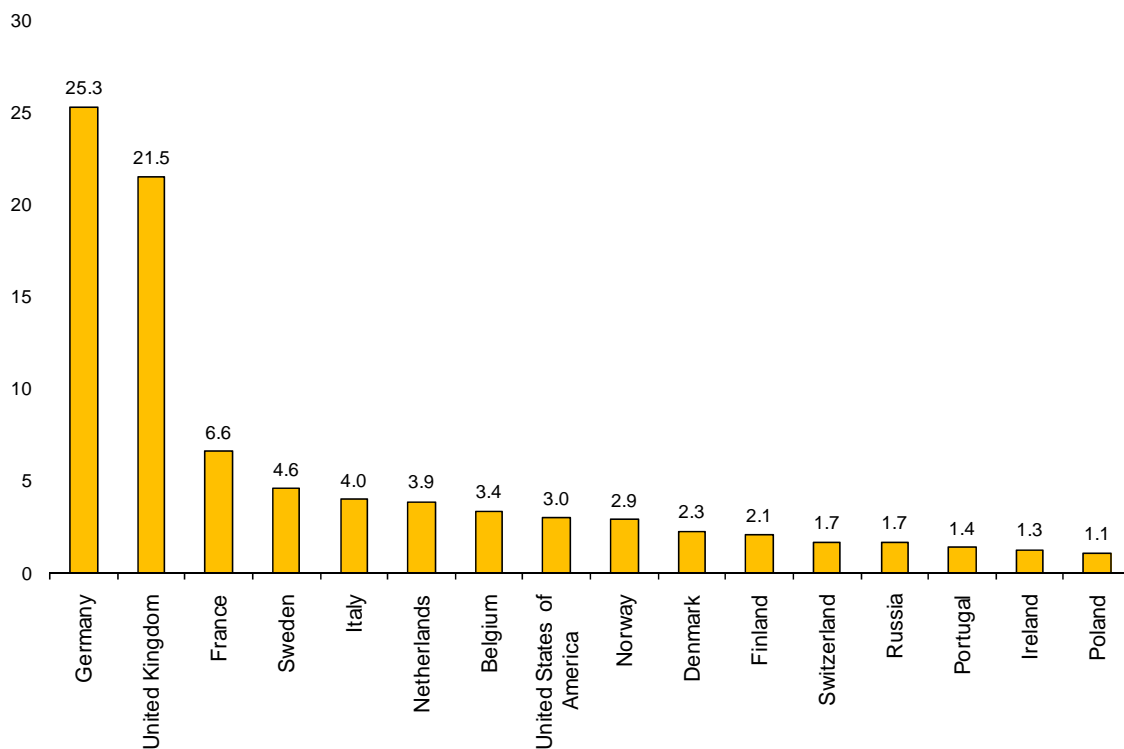
The tourist sites with the highest number of overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Arona reached the highest occupancy rate by bedplaces (83.6%) and Puerto de la Cruz, the highest weekend occupancy rate (82.0%).

## Overnight stays according to the country of origin of the guests<sup>1</sup>

Guests from Germany and the United Kingdom concentrated 25.3% and 21.5%, respectively, of the total of overnight stays in hotel establishments by non-residents in March. The German market experienced a 4.1% decrease and the British market increased 2.1%.

Overnight stays of guests from France, Sweden and Italy (the following countries of origin) registered annual rates of 0.0%, -2.7% and 8.2%, respectively.

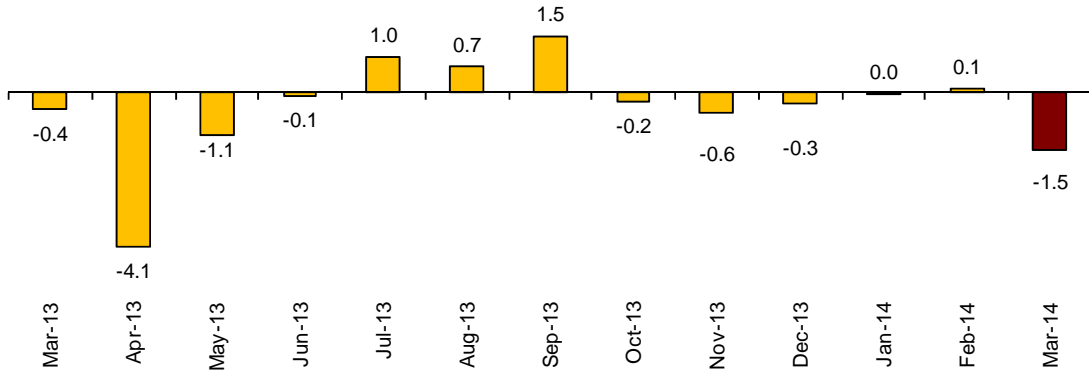
**Distribution of overnight stays of residents abroad from the main 16 countries in %**



## Hotel Prices<sup>1</sup>

The annual rate of the Hotel Prices Index (HPI) stood at  $-1.5\%$  in March, that is, 1.6 points lower than in the previous month and 1.1 points lower 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 March (together they represented 70.5% of the total weight). Hotel prices increased 1.5% in the annual rate in Canarias. In Andalucía they decreased by 3.3% and in Comunidad de Madrid and Cataluña they did so by 2.1%.

By hotel category, the decreases in hotel prices were registered in one-silver-star hotels ( $-3.9\%$ ), in two-golden-stars hotels ( $-3.2\%$ ), in three-golden-star hotels ( $-2.2\%$ ), in three and two-silver-stars hotels ( $-1.5\%$ ), in five-golden-star hotels ( $-1.3\%$ ) and in four-golden-star hotels ( $-1.2\%$ ).

The prices of one-golden-star establishments remained the same.

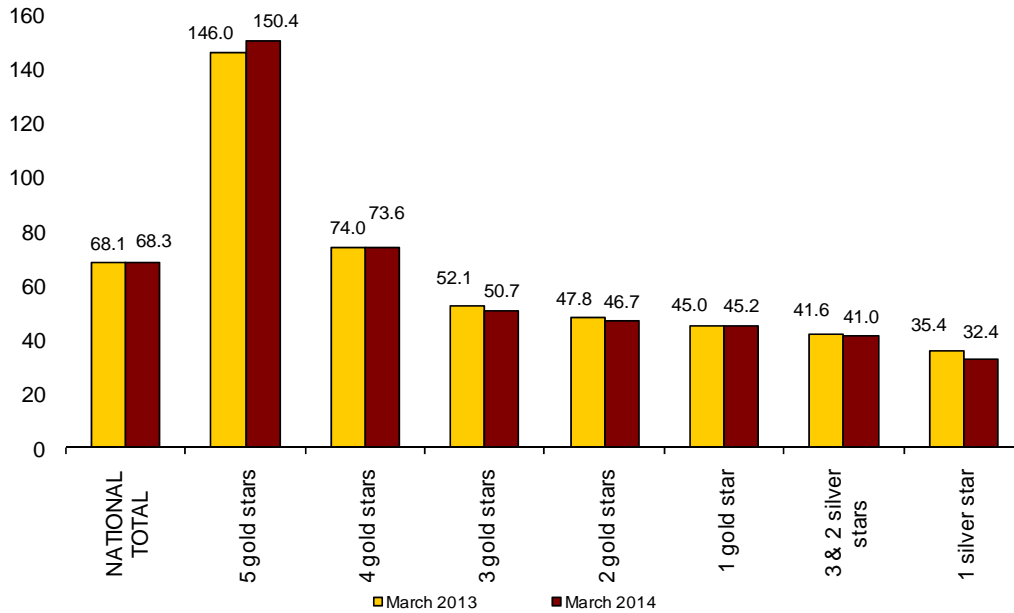
## Indicators on the Profitability of the Hotel Sector

The daily average invoicing per occupied room (ADR) in March was 68.3 euros, which represented an increase of 0.3% as compared with the same month of 2013.

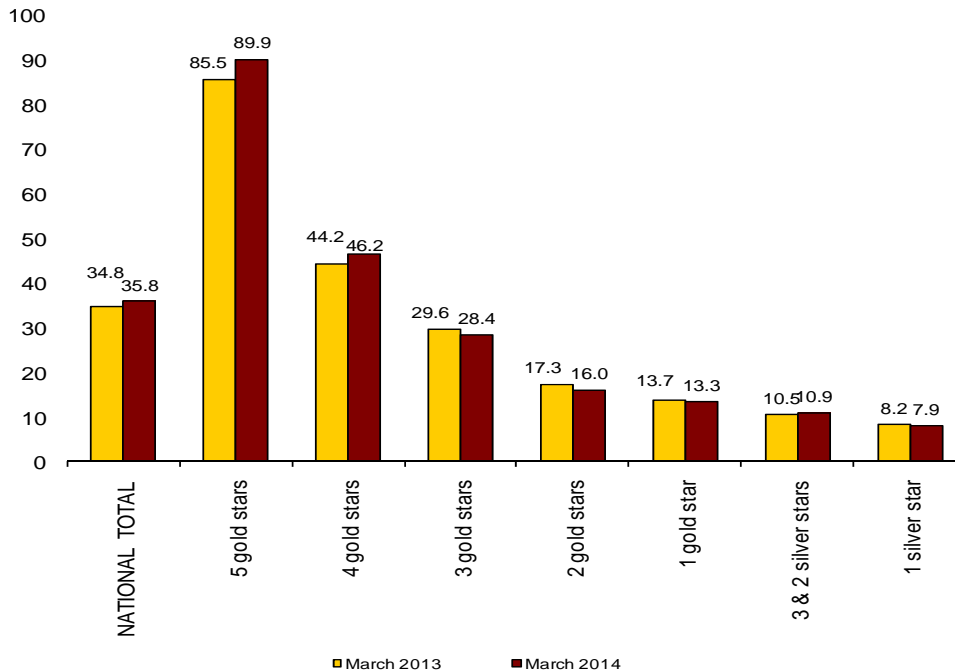
In turn, the daily average revenue per available room (RevPAR), that is conditioned by the occupancy registered in hotel establishments, reached 35.8 euros, with an increase of 2.9%.

By category, the average invoicing was 150.4 euros for five-star hotels, 73.6 euros for four-star hotels and 50.7 euros for three-star hotels. Income per available room for the same categories was 89.9, 46.2 and 28.4 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)

March 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>5,714,082</b>	<b>3,158,532</b>	<b>2,555,551</b>	<b>17,613,468</b>	<b>6,990,538</b>	<b>10,622,930</b>	<b>3.08</b>
HOTELS: Golden stars							
Five	358,784	120,747	238,037	1,209,761	226,816	982,946	3.37
Four	2,812,308	1,422,314	1,389,994	9,242,651	3,053,168	6,189,483	3.29
Three	1,530,676	923,871	606,806	4,921,831	2,322,688	2,599,142	3.22
Two	391,160	272,978	118,182	880,300	533,156	347,144	2.25
One	151,328	102,133	49,195	320,179	188,616	131,563	2.12
INNS: Silver stars							
Two and three	274,476	198,347	76,129	559,620	378,578	181,042	2.04
One	195,350	118,142	77,208	479,126	287,516	191,610	2.45
Annual rate	-7.40	-12.19	-0.72	-6.39	-16.18	1.40	1.10
Cumulative annual rate	0.46	-2.37	4.39	0.97	-6.43	6.17	0.50

### 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>13,582</b>	<b>1,223,738</b>	<b>46.13</b>	<b>51.76</b>	<b>52.35</b>	<b>152,307</b>
HOTELS: Golden stars						
Five	241	73,970	52.45	57.50	59.91	21,590
Four	1,879	547,421	54.06	60.00	62.93	76,058
Three	2,199	311,159	50.71	55.36	56.15	33,669
Two	1,752	95,228	29.68	37.74	34.26	7,422
One	1,058	41,875	24.59	28.95	28.57	3,389
INNS: Silver stars						
Two and three	2,862	80,173	22.45	28.88	26.79	5,495
One	3,591	73,913	20.88	25.56	25.87	4,683
Annual rate	-4.31	-4.81	-1.20	-2.85	2.50	-3.78

### 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	20,851	199,068	107,462	1,537,091	79.21	78.06	88.47	7.48	12,533
Isla de Lanzarote	14,659	92,118	82,797	751,964	78.84	76.33	91.24	7.82	5,413
Isla de Tenerife	54,717	242,755	243,926	1,871,738	77.90	77.21	86.41	7.11	15,848
Sur de Gran Canaria	14,856	147,545	63,424	1,231,749	76.80	76.34	87.79	7.98	9,782
Isla de Gran Canaria	32,587	167,205	104,191	1,318,908	75.16	74.99	86.48	7.12	10,750
Isla de Fuerteventura	5,632	105,320	20,400	924,350	70.91	70.65	80.71	8.51	6,647
Isla de La Gomera	2,101	5,493	3,499	34,634	70.28	61.23	69.07	5.02	413
Barcelona	139,040	431,778	266,519	1,145,279	58.05	62.72	68.23	2.47	12,369

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

Costa Blanca	136,597	99,700	533,344	505,124	54.14	58.83	56.94	4.39	6,965
Isla de Mallorca	50,415	128,245	241,636	764,936	51.41	53.46	57.87	5.63	8,510
Costa del Sol	98,527	153,445	297,330	701,887	49.47	55.30	56.41	3.97	7,750
Palma - Calvià	38,832	74,427	205,267	427,214	51.29	52.67	58.27	5.58	5,324
Costa Brava	81,118	58,970	207,636	187,719	42.07	48.38	43.56	2.82	2,821
Costa de Almería	48,988	9,407	206,101	51,908	37.33	43.14	53.46	4.42	1,642
Costa de la Luz de Cádiz	53,186	27,862	116,510	111,608	29.40	34.78	37.61	2.81	2,448
Costa Daurada	45,673	12,611	129,418	42,503	33.87	40.41	40.81	2.95	1,242

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

Arona	4,944	61,442	28,302	469,647	83.62	80.90	91.28	7.50	3,310
Puerto de La Cruz	16,673	32,618	94,554	283,141	81.15	82.01	85.35	7.66	2,481
Yaiza	5,702	43,368	42,200	353,826	80.20	77.91	92.14	8.07	2,794
Adeje	7,486	104,008	45,280	831,994	79.24	78.52	88.82	7.87	6,732
Teguise	4,252	21,218	23,343	165,725	78.90	75.35	91.03	7.42	1,056
Tías	1,880	25,986	10,651	222,852	78.73	76.56	92.47	8.38	1,454
Mogán	1,786	37,870	5,519	317,819	78.33	77.98	91.69	8.15	1,962
San Bartolomé de Tirajana	12,965	109,793	57,266	914,183	76.45	75.91	86.78	7.91	7,807
Pájara	2,246	68,678	9,180	619,748	74.02	74.10	81.49	8.87	4,364
Palmas de Gran Canaria (Las)	15,140	17,750	34,990	79,944	64.15	66.93	81.00	3.49	816

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

Madrid	372,559	331,794	643,784	751,824	54.89	66.33	68.18	1.98	11,230
Barcelona	127,177	414,324	247,441	1,105,091	59.15	64.22	69.08	2.50	11,933
Benidorm	73,965	56,848	377,549	363,144	63.56	68.69	64.66	5.66	4,227
Palma	25,776	48,450	102,915	264,711	52.76	54.71	61.39	4.95	3,129
Sevilla	87,629	75,925	150,640	162,431	51.68	62.71	58.85	1.91	2,874
Torremolinos	16,696	32,822	87,362	187,061	60.18	66.61	67.45	5.54	1,518
Valencia	77,525	62,618	125,757	140,252	48.96	54.98	57.52	1.90	1,988
Lloret de Mar	34,990	22,407	136,062	104,850	61.85	62.43	57.89	4.20	774
Granada	82,076	53,061	148,253	92,186	54.54	73.95	56.30	1.78	1,538
Calvià	10,393	25,114	78,347	156,319	47.10	47.73	51.74	6.61	1,986

\* 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>5,714,082</b>	<b>100.00</b>	<b>17,613,468</b>	<b>100.00</b>
Residents in Spain	3,158,532	55.28	6,990,538	39.69
Residents abroad	2,555,551	44.72	10,622,930	60.31
Total Residents abroad	2,555,551	100.00	10,622,930	100.00
Total Residents in E.U. (without Spain)	1,802,075	70.52	8,563,729	80.62
- Germany	431,885	16.90	2,683,627	25.26
- Austria	23,155	0.91	100,946	0.95
- Belgium	71,119	2.78	365,226	3.44
- Denmark	39,137	1.53	247,428	2.33
- Finland	39,928	1.56	226,702	2.13
- France	248,102	9.71	705,486	6.64
- Greece	6,639	0.26	19,978	0.19
- Ireland	32,451	1.27	142,107	1.34
- Italy	142,364	5.57	428,505	4.03
- Luxembourg	4,444	0.17	24,036	0.23
- Netherlands	95,197	3.73	410,398	3.86
- Poland	25,787	1.01	119,132	1.12
- Portugal	70,057	2.74	150,192	1.41
- United Kingdom	433,027	16.94	2,282,535	21.49
- Czech Republic	7,974	0.31	29,290	0.28
- Sweden	85,273	3.34	487,757	4.59
- Other EU countries*	45,538	1.78	140,383	1.32
Norway	46,657	1.83	305,214	2.87
Russia	50,476	1.98	183,001	1.72
Switzerland	49,563	1.94	183,444	1.73
Rest of Europe	50,085	1.96	148,959	1.40
Japan	70,436	2.76	116,434	1.10
United States of America	134,421	5.26	312,904	2.95
Rest of America	133,187	5.21	337,384	3.18
Africa	36,853	1.44	82,479	0.78
Other countries	181,799	7.11	389,381	3.67

\*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 2014

Provisional data

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

	Index	Annual growth rate
<b>TOTAL</b>	<b>86.5</b>	<b>-1.5</b>
Andalucía	82.3	-3.3
Aragón	72.9	-2.4
Asturias, Principado de	78.3	-5.6
Balears, Illes	93.7	-1.4
Canarias	102.2	1.5
Cantabria	82.3	-6.7
Castilla y León	83.3	-3.0
Castilla - La Mancha	83.1	-3.5
Cataluña	81.1	-2.1
Comunitat Valenciana	83.4	-3.3
Extremadura	80.0	-6.9
Galicia	86.3	-3.6
Madrid, Comunidad de	74.3	-2.1
Murcia, Región de	72.4	-3.7
Navarra, Comunidad Foral de	80.5	0.7
País Vasco	80.5	-5.7
Rioja, La	79.8	-1.6
Ceuta	94.4	-4.7
Melilla	94.4	0.2

### National General Index and breakdown by categories

	Index	Annual growth rate
<b>TOTAL</b>	<b>86.5</b>	<b>-1.5</b>
<b>HOTELS: Gold stars</b>		
Five	83.8	-1.3
Fourth	86.6	-1.2
Three	85.7	-2.2
Two	84.9	-3.2
One	92.9	0.0
<b>HOSTALS: Silver stars</b>		
Three and two	85.9	-1.5
One	93.7	-3.9

## Indicators on the Profitability of the Hotel Sector

March 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>68.3</b>	<b>0.3</b>	<b>35.8</b>	<b>2.9</b>
Andalucía	58.1	-2.3	26.9	-3.1
Aragón	56.3	-0.2	17.1	-18.4
Asturias, Principado de	48.6	-12.3	12.7	-27.9
Balears, Illes	56.5	-1.2	32.5	-5.0
Canarias	84.5	1.5	71.8	8.2
Cantabria	54.4	-3.3	15.5	-13.2
Castilla y León	50.4	-5.3	14.3	-15.1
Castilla - La Mancha	51.7	-8.4	13.8	-7.3
Cataluña	77.6	0.4	40.7	6.1
Comunitat Valenciana	50.0	-6.5	25.7	-8.0
Extremadura	52.0	-12.1	14.7	-20.5
Galicia	47.8	-4.5	11.6	-10.8
Madrid, Comunidad de	72.5	-2.4	44.8	13.8
Murcia, Región de	46.8	-7.7	21.3	-10.6
Navarra, Comunidad Foral de	55.5	-1.8	20.2	4.9
País Vasco	64.2	-5.7	27.6	-18.7
Rioja, La	58.5	-1.6	28.6	2.7
Ceuta	69.7	5.6	37.8	31.1
Melilla	63.6	-2.5	43.3	70.1

### 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>68.3</b>	<b>0.3</b>	<b>35.8</b>	<b>2.9</b>
<b>HOTELS: Gold stars</b>				
Five	150.4	3.1	89.9	5.1
Four	73.6	-0.5	46.2	4.5
Three	50.7	-2.7	28.4	-4.2
Two	46.7	-2.3	16.0	-7.3
One	45.2	0.6	13.3	-2.8
<b>GUESTHOUSES: Silver stars</b>				
Three and two	41.0	-1.4	10.9	3.8
One	32.4	-8.6	7.9	-3.5

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