

23 May 2013

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
April 2013. *Provisional data*

**Overnight stays in hotel establishments decrease 11.0% in April¹,
as compared with the same month in 2012**

**Hotels earn 33.7 euros per available room and invoice an average of
66.0 euros per occupied room**

During the month of April, 19.1 million overnight stays were recorded in hotel establishments, indicating a 11.0% decrease as compared with the same month in 2012. Overnight stays for residents decreased by -23.4%, as well as for non-residents that did so by -1.5%.

The average stay increased 0.6%, as compared with April 2012, standing at 3.0 nights per guest.

During the first four-month period of 2013, overnight stays decreased 4.1% as compared with the same month of the previous year.

Due to the fact that in 2013 Easter was celebrated during the month of March, and that in 2012 it was celebrated in April, it is advisable to analyse the **aggregate period of March-April**. In this period it is observed a 2.4% decrease in the overnight stays as compared with the same two-month period of 2012. During the said period the overnight stays for residents registered a decrease of 8.4% while for non-residents increased 2.3%.

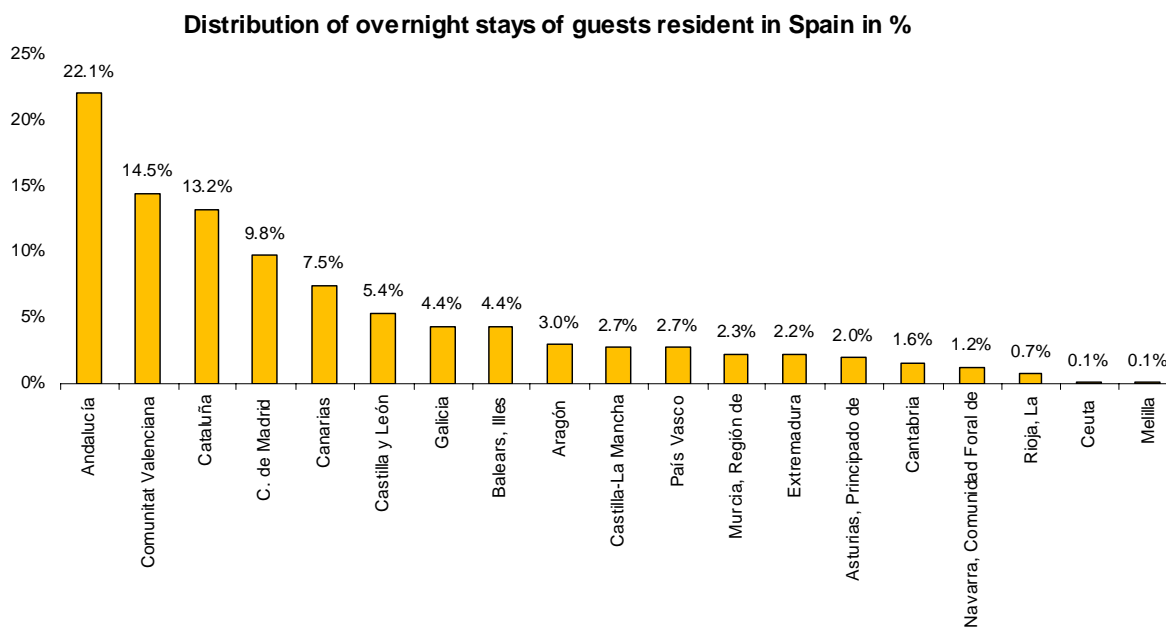
Interannual rates of overnight stays in %



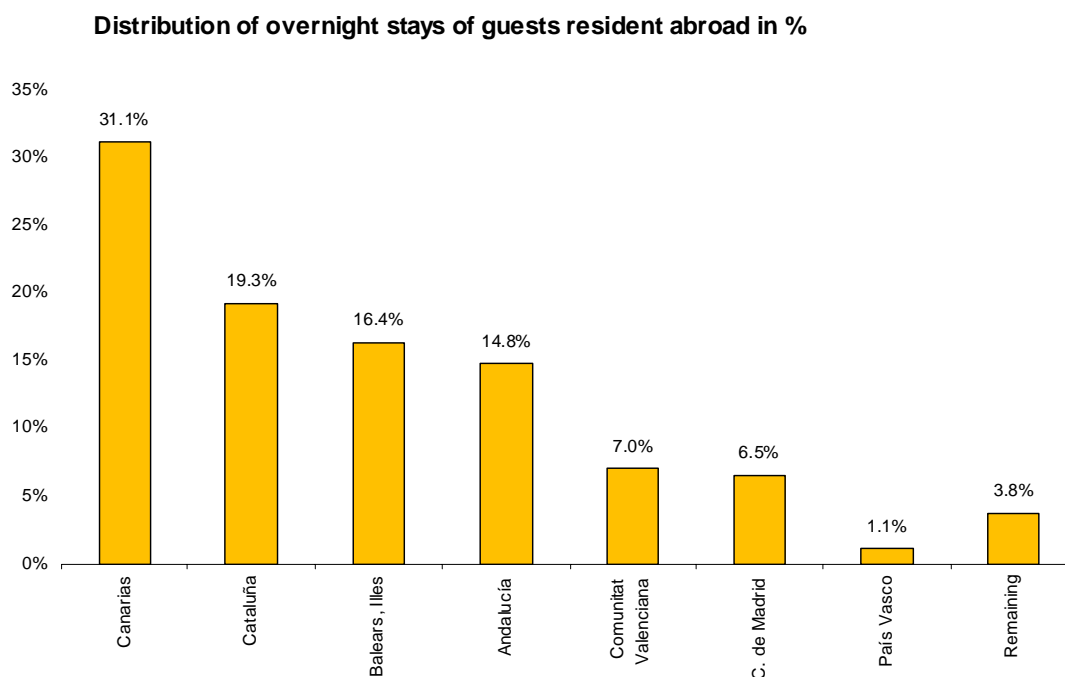
¹ Given that in 2013 Easter was celebrated during the month of March and that in 2012 was in April, it is advisable to analyse both months jointly.

Main destinations

In April, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with interannual rates for overnight stays of -19.4%, -18.4%, -33.6% and -17.2%, respectively.



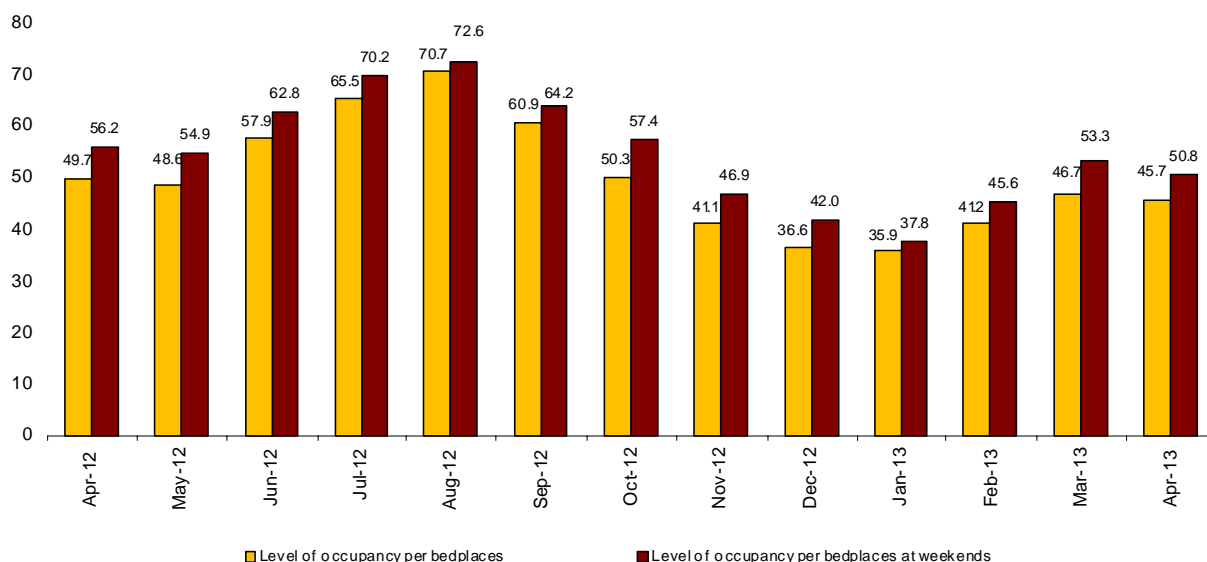
The main destination chosen by non-residents was Canarias. In this Autonomous Community, overnight stays by foreign nationals increased by 2.0%, as compared with the same month of 2012. Followed by Cataluña, with an annual rate of -6.3%, and Illes Balears, with an increase of 1.3%.



Hotel Occupancy

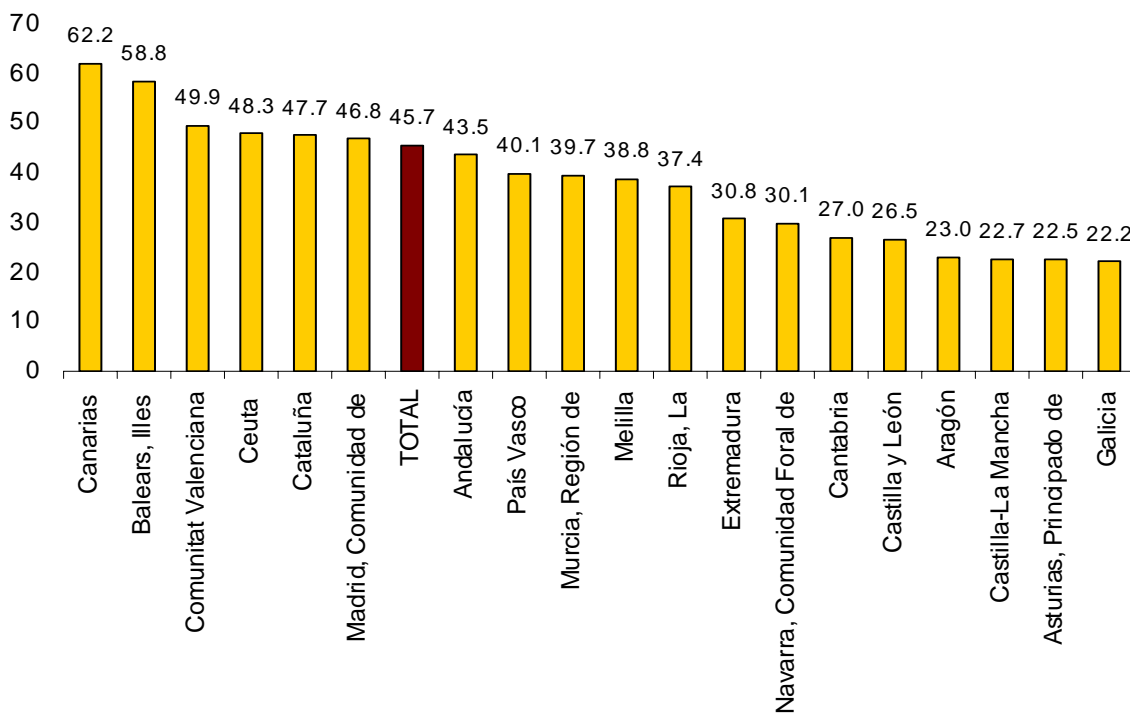
In terms of occupancy, 45.7% of the available bedplaces were occupied in April, with an annual decrease of 8.0%. The weekend occupancy rate by bedplaces decreased 9.6% and stood at 50.8%.

Level of occupancy per bedplaces and per bedplaces at weekends



During the month of April, Canarias was the Autonomous Community with the highest occupancy rate by bedplaces (62.2%), followed by Illes Balears (58.8%) and Comunitat Valenciana (49.9%).

Level of occupancy per bedplaces by Automous Communities



The South of Tenerife presented the highest occupancy rate by bedplaces (71.6%), in turn, the tourist region of Barcelona registered the highest weekend occupancy rate by bedplaces (75.4%). In the island of Mallorca 2.1 million overnight stays were registered in April.

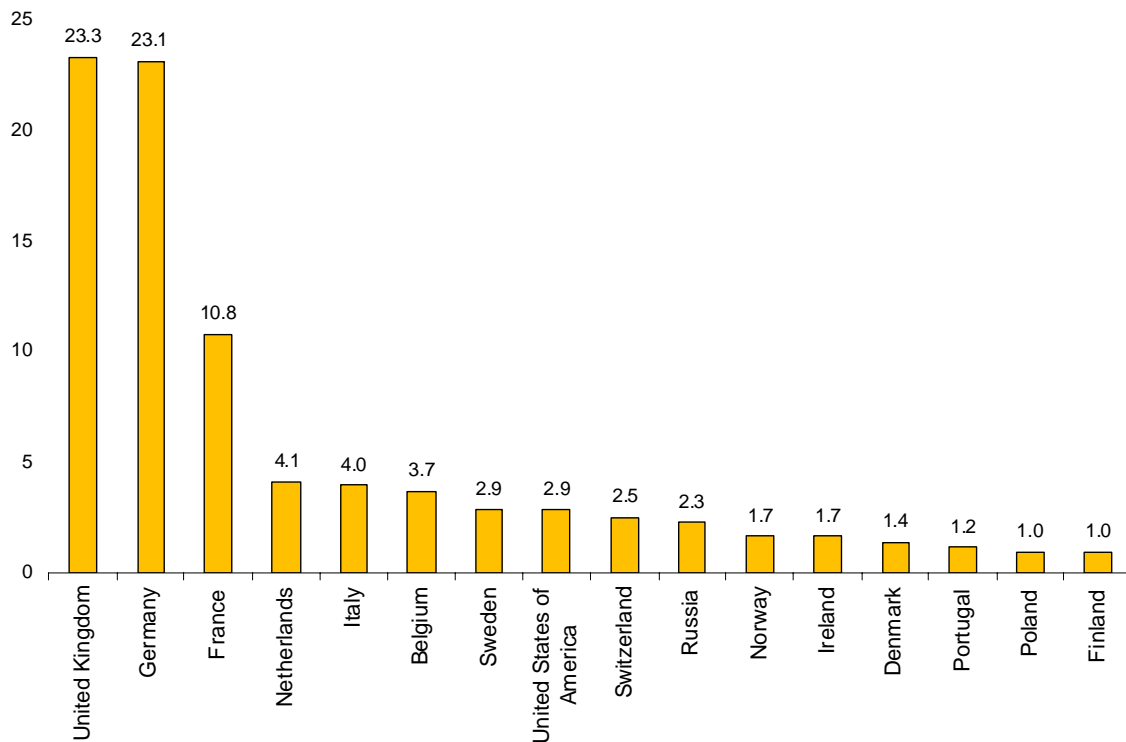
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Benidorm. Arona reached the highest occupancy rate by bedplaces (77.2%) and Benidorm the highest weekend occupancy (79.3%).

Overnight stays of guests resident abroad

Guests from the United Kingdom and Germany registered 23.3% and 23.1%, respectively, of the total of overnight stays by foreigners in April. The British market experienced a 10.6% annual increase, in turn, the German market decreased by 7.3%.

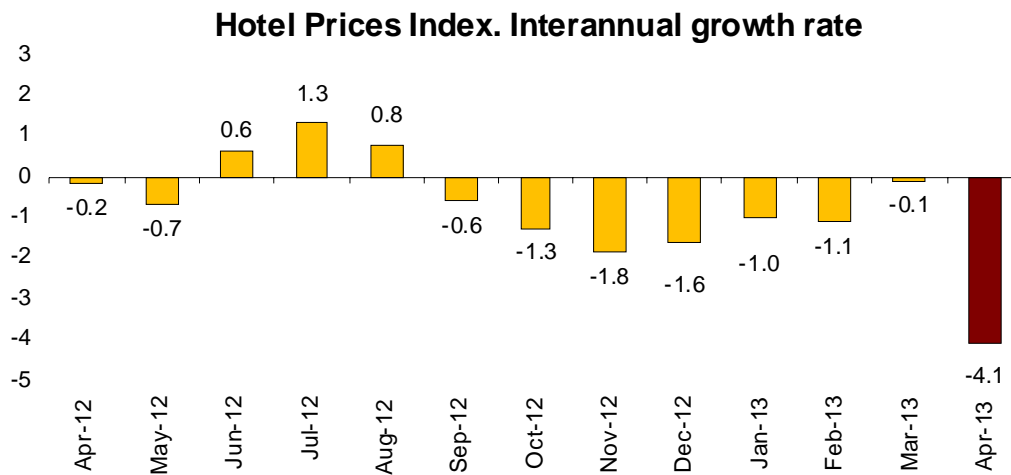
Overnight stays of guests from France, The Netherlands and Italy (the following countries of origin) registered annual rates of 3.0%, -5.8% and -16.8%, respectively.

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



Hotel Price Index

The interannual rate of the Hotel Price Index (HPI) stood at -4.1% in April, being this rate 4.0 points below that of last month and 3.9 points below that registered last year.



The four Autonomous Communities (Cataluña, Canarias, Andalucía and Comunidad de Madrid) that carried 68.2% of the total load of the HPI in the month of April, showed negative annual rates.

Cataluña, which carried the greatest load in the weighting structure this month, presented an annual rate of -5.8% , 3.5 points lower than that estimated in March. Hotel prices experienced a decrease of 0.7% in Canarias, 3.7 points less, as compared with the previous month. Andalucía registered a rate of -5.7% , as compared with the 2.4% registered in the last month. Comunidad de Madrid registered a price variation of -5.7% , 0.2 points less than in March.

The greatest decreases in hotel prices by hotel category were registered in three and two-silver-star hotels (with a -8.9% rate), in two-gold-star hotels (-5.9%) and in three-gold-star hotels (-4.5%).

The remainder categories also registered negative annual rates: five-gold-star establishments (-3.8%), four-gold-star establishments and one-gold star establishment (-3.7% in both cases) and one silver-star (-1.9%).

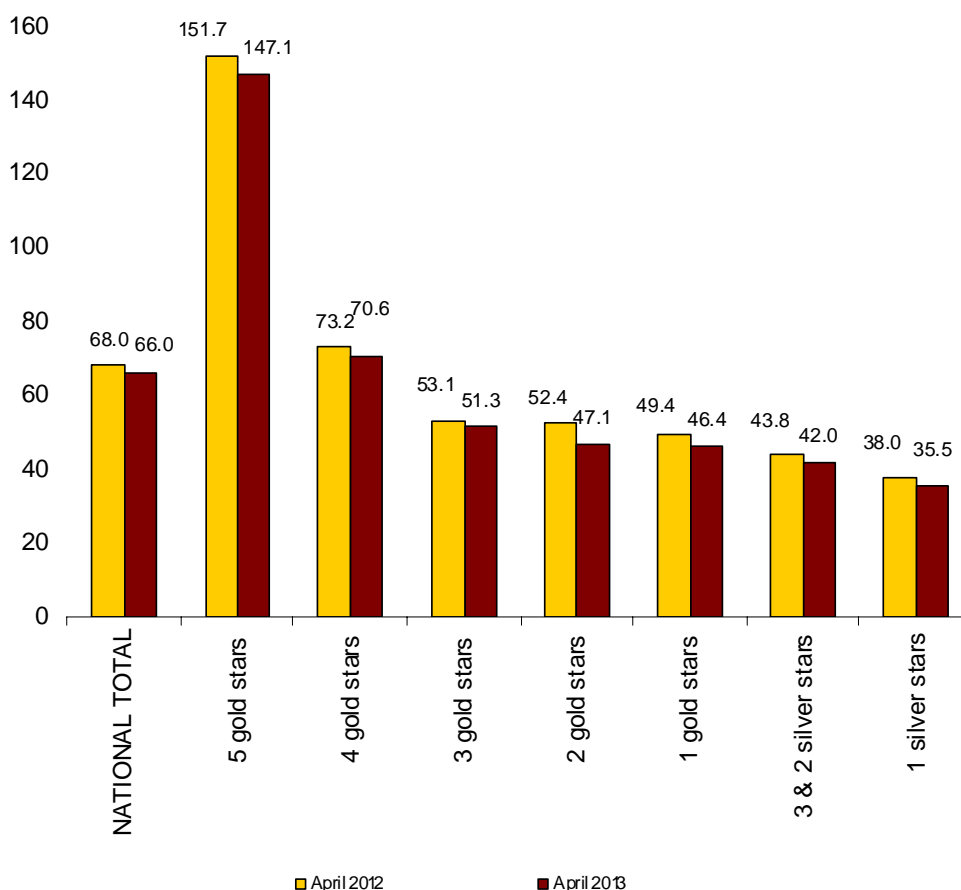
Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in April was 66.0 euros, a 3.0% increase as compared with the same month in 2012.

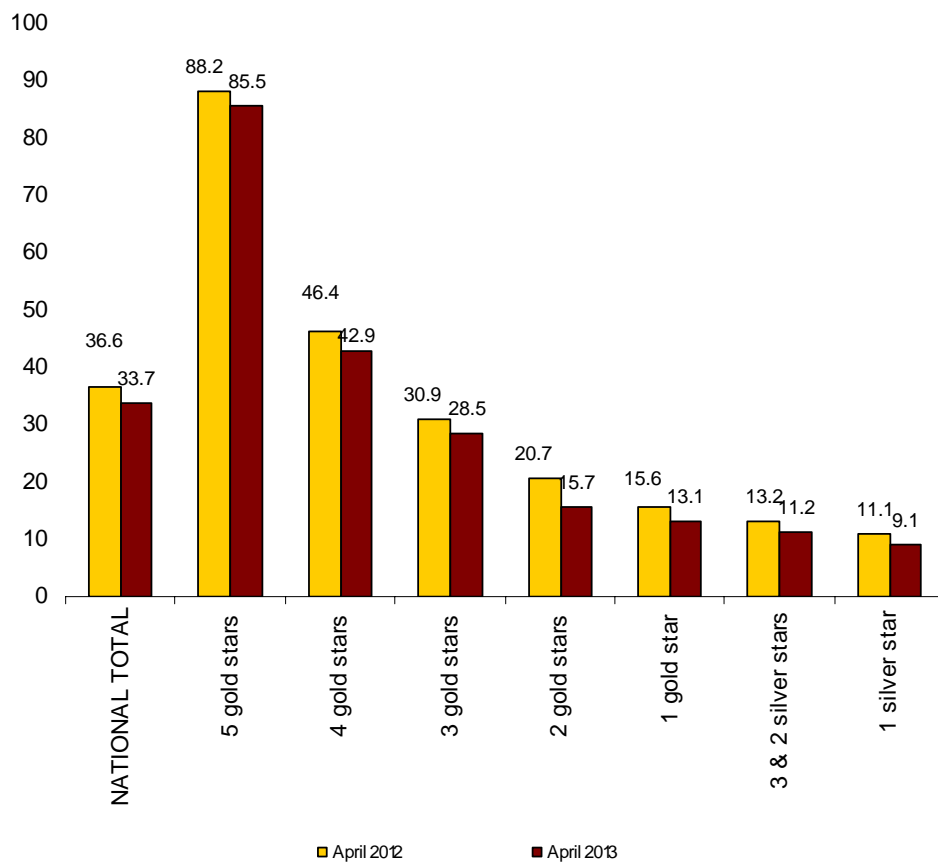
In turn, income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 33.7 euros, with a decrease of 8.0% as compared with April 2012.

By category, the average invoicing was 147.1 euros for five-star hotels, 70.6 euros for four-star hotels and 51.3 euros for three-star hotels. Income per available room for these same categories was 85.5, 42.9 and 28.5 euros, respectively.

Average daily rate (ADR)



Revenue per available room (RevPAR)



Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

April 2013

Provisional data

1. Travellers, overnight stays and average stay by categories of establishment

Category	Number of travellers			Number of overnight stays			Average stay
	Total	Residents in Spain	Residents abroad	Total	Residents in Spain	Residents abroad	
TOTAL	6,282,260	3,112,438	3,169,822	19,085,628	7,156,410	11,929,218	3.04
HOTELS: Golden stars							
Five	354,807	111,965	242,842	1,187,964	217,838	970,126	3.35
Four	2,999,027	1,367,681	1,631,346	9,752,283	3,113,941	6,638,342	3.25
Three	1,772,981	929,975	843,005	5,644,073	2,391,927	3,252,146	3.18
Two	445,883	292,238	153,645	947,049	591,404	355,645	2.12
One	170,483	102,697	67,786	366,219	196,996	169,223	2.15
INNS: Silver stars							
Two and three	291,933	180,918	111,015	600,592	344,579	256,013	2.06
One	247,146	126,964	120,182	587,449	299,725	287,723	2.38
Interannual rate	-11.56	-19.74	-1.73	-11.00	-23.36	-1.47	0.63
Cumulative interannual rate	-5.28	-9.26	0.16	-4.07	-10.64	0.86	1.28

2. Open establishments, capacity, occupancy and employed personnel by categories of establishment

Category	Estimated open establishments	Estimated bedplaces	Level of occupancy			Employed personnel
			Per bedplaces	Per bedplaces at weekend	Per rooms	
TOTAL	14,801	1,379,291	45.66	50.84	51.24	167,841
HOTELS: Golden stars						
Five	253	77,751	50.29	56.75	58.31	21,610
Four	2,036	603,364	53.33	57.91	60.75	81,964
Three	2,418	370,248	50.22	56.04	55.96	39,965
Two	1,880	107,598	29.24	35.70	33.66	8,680
One	1,175	46,872	25.97	30.96	30.15	3,683
INNS: Silver stars						
Two and three	3,039	88,133	22.66	27.77	26.72	6,236
One	4,001	85,326	22.62	26.71	26.78	5,702
Interannual rate	-2.56	-2.87	-8.04	-9.58	-4.84	-6.36

3. Travellers, overnight stays, occupancy, average stay and employed personnel

Results by areas and tourist sites

	Travellers		Overnight stays		Level of occupancy			Average stay	Employed personnel
	Residents in Spain	Residents abroad	Residents in Spain	Residents abroad	Per bedplac	Per bedplaces at weekend	Per rooms		

Tourist areas with a greater level of occupancy per month

Sur de Tenerife	29,350	162,300	140,875	1,292,403	71.57	72.39	76.75	7.48	11,932
Isla de Lanzarote	16,033	70,929	94,107	595,408	67.22	67.53	74.76	7.93	5,072
Isla de Tenerife	58,879	188,784	267,383	1,483,456	67.08	67.82	71.44	7.07	15,173
Barcelona	120,533	480,684	229,885	1,255,365	66.99	75.43	77.11	2.47	12,108
Palma - Calvià	50,233	176,716	212,255	910,261	65.43	72.27	74.27	4.95	7,403
Costa Blanca	142,779	129,781	628,057	588,371	62.06	67.66	64.40	4.46	7,260
Sur de Gran Canaria	16,736	96,694	87,741	817,074	61.09	62.95	67.85	7.98	8,193
Islas de Ibiza-Formentera	8,424	19,078	20,127	71,447	60.55	69.03	61.51	3.33	679

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

Isla de Mallorca	69,483	330,200	278,879	1,868,720	59.19	61.40	65.88	5.37	15,105
Costa del Sol	133,773	233,945	365,984	915,340	53.91	59.30	60.49	3.48	9,738
Isla de Gran Canaria	33,715	106,575	128,318	857,978	58.80	60.88	66.14	7.03	9,134
Isla de Fuerteventura	7,028	82,688	33,864	716,217	56.55	57.41	64.03	8.36	6,429
Costa Brava	69,204	146,477	175,928	481,586	39.80	45.65	44.57	3.05	5,381
Costa Daurada	69,811	76,142	225,780	238,467	43.70	43.72	44.68	3.18	2,807
Costa de la Luz de Cádiz	73,350	43,546	157,777	166,414	31.21	40.59	39.49	2.77	3,461
Costa de Almería	50,586	12,068	215,916	49,203	34.89	38.90	47.83	4.23	1,835

Tourist sites with a greater level of occupancy per month

Arona	7,176	48,716	33,615	405,694	77.24	76.10	81.78	7.86	3,106
Benidorm	75,826	81,263	450,256	439,921	74.82	79.32	74.87	5.67	4,623
Adeje	12,660	90,683	66,725	710,595	72.59	73.37	78.80	7.52	6,571
Palma	44,385	117,807	158,735	542,234	71.77	79.06	80.13	4.32	4,519
Yaiza	7,117	35,653	48,284	295,874	71.40	74.52	80.85	8.05	2,543
Torremolinos	41,752	61,805	127,904	279,643	71.06	73.79	72.69	3.94	2,219
Barcelona	114,005	462,571	213,693	1,214,458	68.18	76.51	77.82	2.48	11,706
Tías	2,670	19,373	15,248	170,913	64.87	62.76	71.70	8.45	1,381
Teguise	3,831	15,173	25,654	124,060	64.73	59.89	68.86	7.88	1,036
Sevilla	89,974	102,981	162,074	214,404	64.55	75.17	72.28	1.95	2,849

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

Madrid	315,260	319,436	529,683	721,373	51.42	60.63	63.54	1.97	11,475
San Bartolomé De Tirajana	12,797	69,370	72,563	593,846	60.68	61.27	66.40	8.11	6,363
Pájara	3,414	54,759	19,364	462,422	54.24	58.73	63.51	8.28	4,607
Calvià	10,539	63,932	61,813	357,315	57.35	63.39	66.06	5.63	3,000
Lloret De Mar	16,410	69,916	89,287	275,090	56.45	61.23	64.22	4.22	1,710
Salou	34,610	44,027	145,417	150,200	54.66	50.75	50.70	3.76	1,345
Valencia	62,833	69,284	106,710	163,871	51.48	58.24	61.39	2.05	2,032
Puerto De La Cruz	17,228	18,794	99,036	160,186	58.08	60.21	59.82	7.20	2,446
Granada	67,476	76,920	122,289	129,780	63.53	76.20	66.15	1.75	1,535
Mogán	4,111	27,448	16,502	222,627	61.97	67.40	71.92	7.58	1,850

* Not taken into account those included in the preceding table because they are in the bigger level of occupancy tables too.

4. Travellers, overnight stays and average stay by country of residence

Results by countries

Countries	Number of travellers		Overnight stays	
	Total	%	Total	%
TOTAL	6,282,260	100.00	19,085,628	100.00
Residents in Spain	3,112,438	49.54	7,156,410	37.50
Residents abroad	3,169,822	50.46	11,929,218	62.50
Total Residents abroad	3,169,822	100.00	11,929,218	100.00
Total Residents in U.E. (without Spain)	2,303,653	72.67	9,667,334	81.04
- Germany	505,468	15.95	2,751,798	23.07
- Austria	31,212	0.98	113,367	0.95
- Belgium	95,606	3.02	438,370	3.67
- Denmark	37,535	1.18	171,780	1.44
- Finland	26,206	0.83	114,643	0.96
- France	455,900	14.38	1,289,601	10.81
- Greece	7,655	0.24	18,789	0.16
- Ireland	46,342	1.46	196,320	1.65
- Italy	175,676	5.54	474,429	3.98
- Luxembourg	4,851	0.15	31,468	0.26
- Netherlands	130,236	4.11	483,728	4.05
- Poland	35,929	1.13	121,492	1.02
- Portugal	72,745	2.29	145,375	1.22
- United Kingdom	547,507	17.27	2,782,405	23.32
- Czech Republic	10,899	0.34	38,852	0.33
- Sweden	71,609	2.26	348,745	2.92
- Rest of UE*	48,278	1.52	146,171	1.23
Norway	44,027	1.39	197,737	1.66
Russia	75,947	2.40	270,406	2.27
Switzerland	75,027	2.37	302,191	2.53
Rest of Europe	77,953	2.46	210,337	1.76
Japan	44,996	1.42	71,904	0.60
United States of America	160,076	5.05	342,816	2.87
Rest of America	159,844	5.04	371,128	3.11
African's countries	38,630	1.22	86,097	0.72
Rest of the world	189,670	5.98	409,268	3.43

*Countries included in the Rest of UE: Bulgaria, Cyprus, Slovakia, Slovenia, Estonia, Hungary, Latvia, Lithuania, Malta and Romania

Hotel Price Index (HPI). 2008 Base

April 2013

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Interannual variation rate
TOTAL	88.2	-4.1
Andalucía	85.9	-5.7
Aragón	68.7	-8.6
Asturias, Principado de	83.1	-8.9
Balears, Illes	97.8	1.1
Canarias	99.7	-0.7
Cantabria	87.1	-9.1
Castilla y León	85.7	-8.3
Castilla - La Mancha	85.5	-6.8
Cataluña	86.7	-5.8
Comunitat Valenciana	87.2	-4.3
Extremadura	82.5	-6.6
Galicia	88.7	-7.0
Madrid, Comunidad de	76.4	-5.7
Murcia, Región de	77.8	-5.1
Navarra, Comunidad Foral de	81.6	-9.1
País Vasco	87.4	-2.5
Rioja, La	82.6	-4.3
Ceuta	94.6	-9.4
Melilla	95.1	-2.5

National General Index and breakdown by categories

	Index	Interannual variation rate
TOTAL	88.2	-4.1
HOTELS: Gold stars		
Five	83.7	-3.8
Fourth	88.1	-3.7
Three	89.1	-4.5
Two	88.8	-5.9
One	94.5	-3.7
HOSTALS: Silver stars		
Three and two	85.4	-8.9
One	96.7	-1.9

Indicators on the Profitability of the Hotel Sector

April 2013

Provisional data

National ADR and RevPAR^(*) and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Variation Rate variation	RevPar (in euros)	Variation Rate variation
TOTAL	66.0	-3.0	33.7	-8.0
Andalucía	61.4	-7.0	31.0	-12.0
Aragón	48.5	-8.8	12.2	-27.1
Asturias, Principado de	50.5	-7.5	12.8	-26.5
Balears, Illes	60.1	1.2	39.1	5.1
Canarias	77.8	2.3	53.1	1.9
Cantabria	55.9	-4.9	16.5	-16.3
Castilla y León	50.8	-9.7	15.4	-26.7
Castilla - La Mancha	53.2	-9.4	14.1	-24.4
Cataluña	75.3	-4.3	40.6	-11.3
Comunitat Valenciana	50.9	-5.0	27.2	-6.7
Extremadura	53.1	-7.9	18.2	-25.8
Galicia	48.8	-11.1	13.0	-20.5
Madrid, Comunidad de	75.7	-4.3	43.9	-11.5
Murcia, Región de	49.4	-6.8	22.2	-6.0
Navarra, Comunidad Foral de	58.4	-3.0	20.8	-7.6
País Vasco	67.1	-1.1	33.2	-8.7
Rioja, La	59.1	-1.7	24.9	-20.5
Ceuta	64.0	-8.0	29.8	-18.2
Melilla	65.8	2.3	35.2	2.5

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

	ADR (in euros)	Variation Rate interannual	RevPar (in euros)	Variation Rate interannual
TOTAL	66.0	-3.0	33.7	-8.0
HOTELS: Gold stars				
Five	147.1	-3.1	85.5	-3.1
Four	70.6	-3.6	42.9	-7.6
Three	51.3	-3.5	28.5	-8.0
Two	47.1	-10.2	15.7	-24.2
One	46.4	-6.2	13.1	-15.9
GUESTHOUSES: Silver stars				
Three and two	42.0	-4.2	11.2	-15.6
One	35.5	-6.7	9.1	-18.1

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