

24 June 2013

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

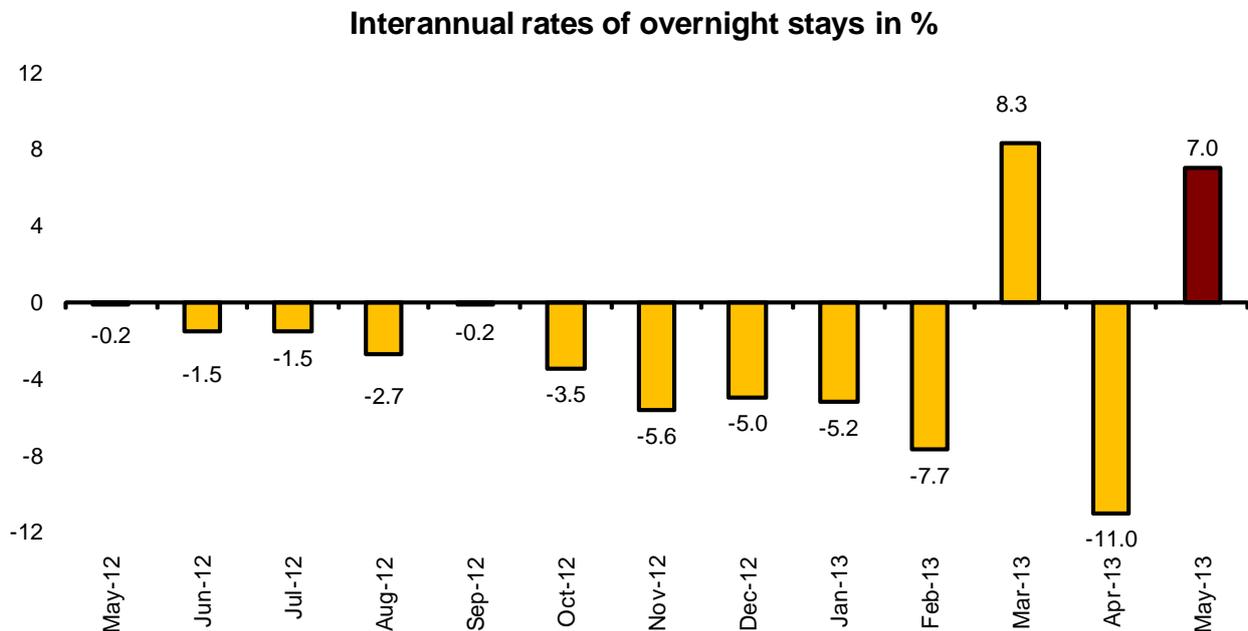
**Overnight stays in hotel establishments increase 7.0% in May, as compared with the same month in 2012**

**Hotels earn 36.3 euros per available room and invoice an average of 65.1 euros per occupied room**

During the month of May, 26.3 million overnight stays were recorded in hotel establishments, indicating a 7.0% increase as compared with the same month in 2012. Overnight stays for residents increased by 4.3%, as well as for non-residents that did so by 8.3%.

The average stay increased 1.8%, as compared with May 2012, standing at 3.2 nights per guest.

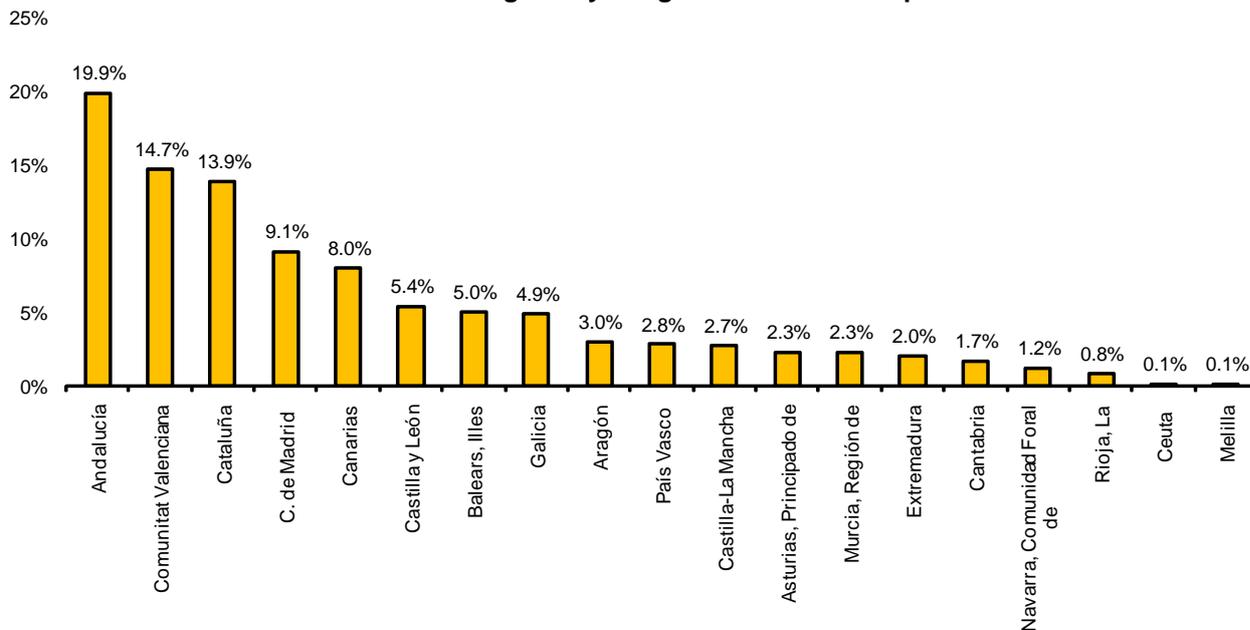
During the first five-month period of 2013, overnight stays decreased 1.0% as compared with the same month of the previous year.



**Main destinations**

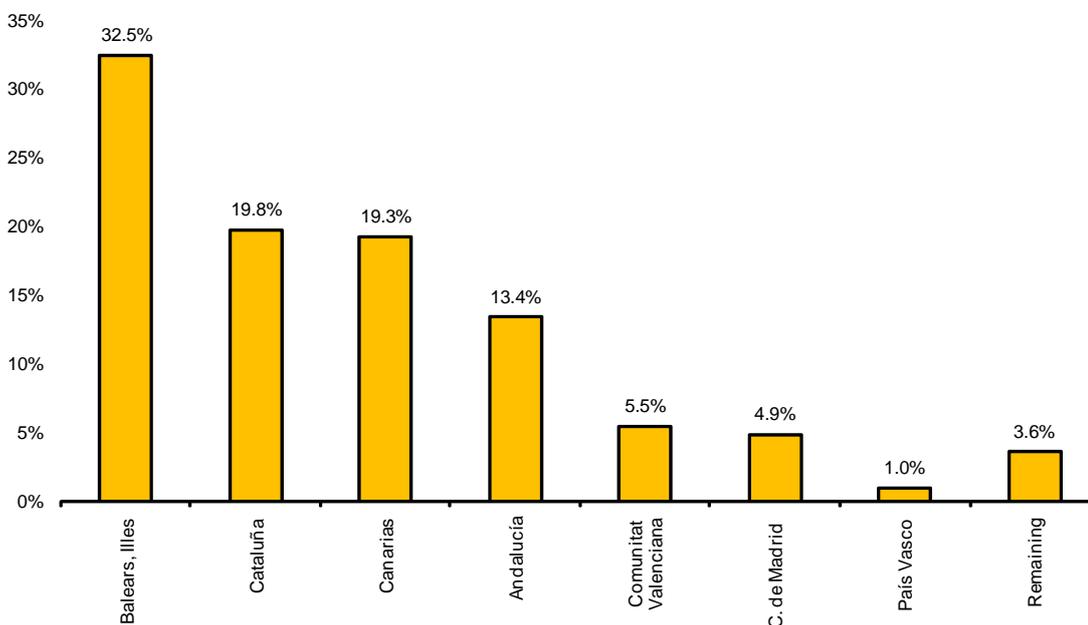
In May, Andalucía, Comunitat Valenciana, Cataluña and Comunidad de Madrid were the main destinations of guests resident in Spain, with interannual rates for overnight stays of 11.1%, 14.3%, -0.7% and -11.4%, respectively.

**Distribution of overnight stays of guests resident in Spain in %**



The main destination chosen by non-residents was Illes Balears. In this Autonomous Community, overnight stays by foreign nationals increased by 5.2%, as compared with the same month of 2012. Followed by Cataluña, with an annual rate of 12.8%, and Canarias, with an increase of 8.5%.

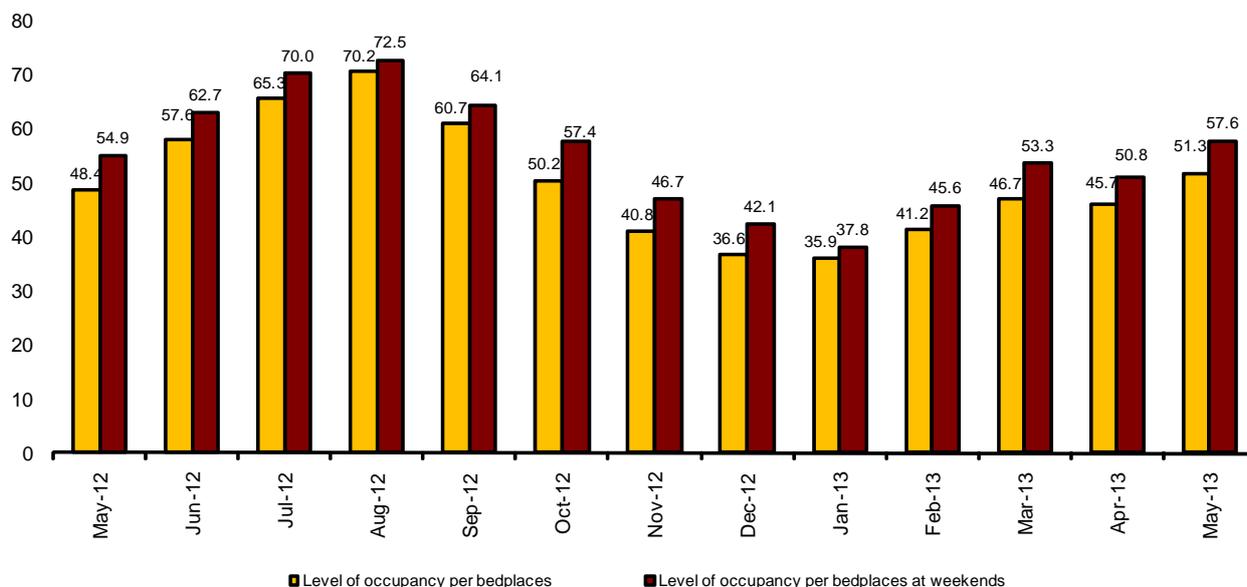
**Distribution of overnight stays of guests resident abroad in %**



### Hotel Occupancy

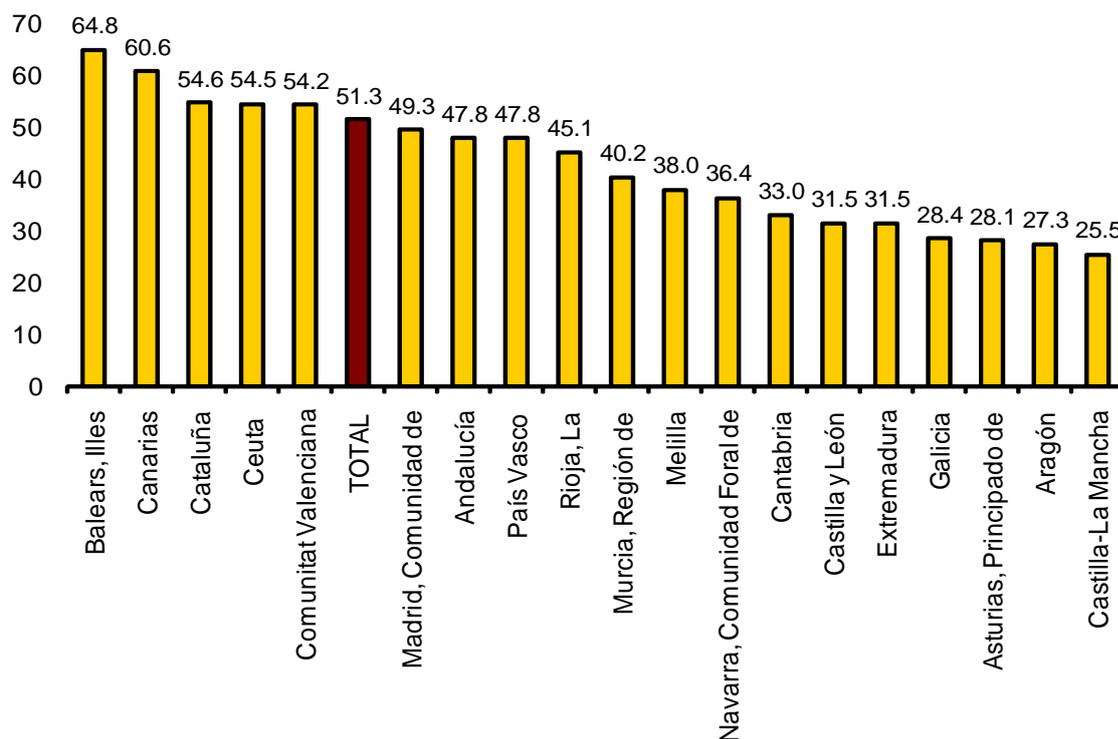
In terms of occupancy, 51.3% of the available bedplaces were occupied in May, with an annual increase of 6.1%. The weekend occupancy rate by bedplaces increased 4.8% and stood at 57.6%.

**Level of occupancy per bedplaces and per bedplaces at weekends**



During the month of May, Illes Balears was the Autonomous Community with the highest occupancy rate by bedplaces (64.8%), followed by Canarias (60.6%) and Cataluña (54.6%).

**Level of occupancy per bedplaces by Automous Communities**



By tourist areas, Barcelona presented both the highest occupancy rate by bedplaces in May (72.8%) and the highest weekend occupancy rate by bedplaces (81.9%). In the island of Mallorca over 5 million overnight stays were registered in May.

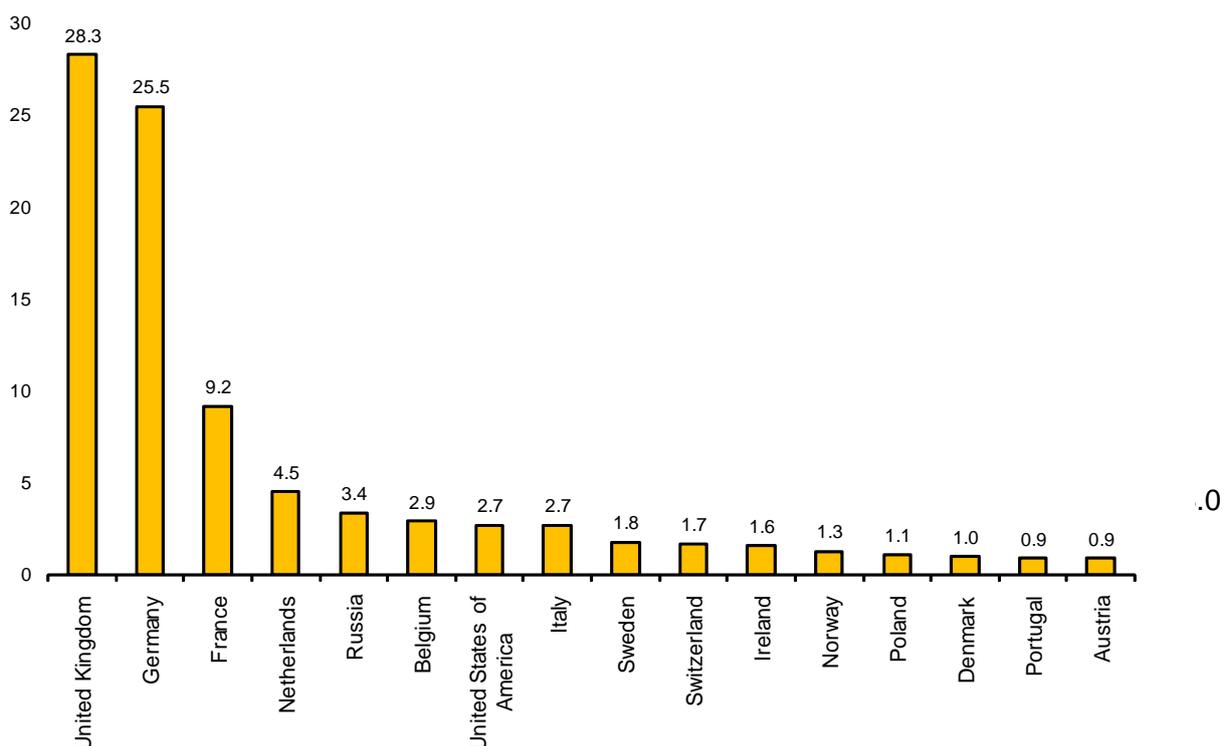
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Benidorm. Benidorm also reached the highest occupancy rate by bedplaces (80.5%) and the highest weekend occupancy (88.3%).

**Overnight stays of guests resident abroad**

Guests from the United Kingdom and Germany registered 28.3% and 25.5%, respectively, of the total of overnight stays by non-residents in May. The British market experienced a 9.9% annual increase, in turn, the German market decreased by 3.4%.

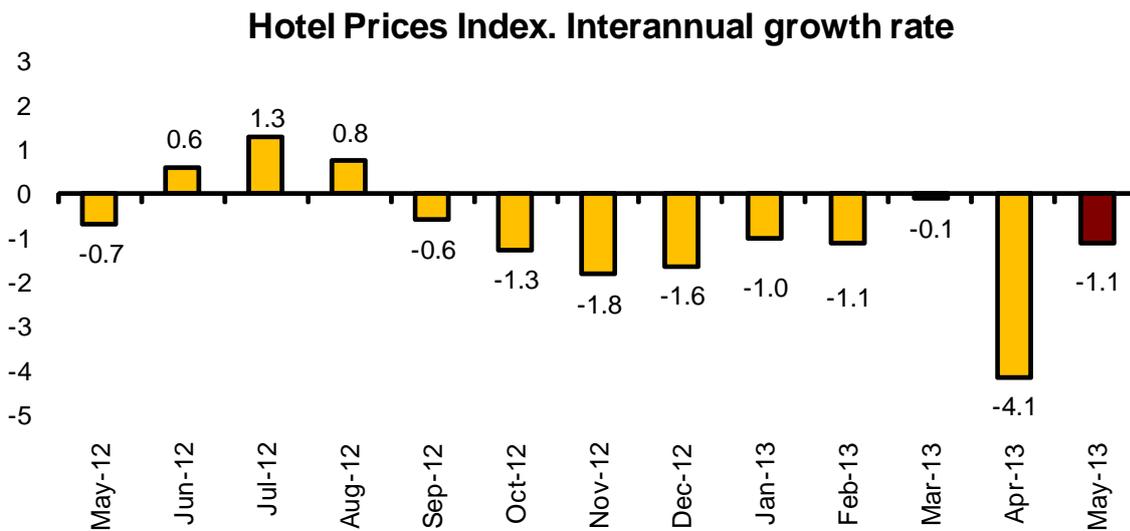
Overnight stays of guests from France, The Netherlands and Russia (the following countries of origin) registered annual rates of 23.1%, 8.7% and 18.0%, respectively.

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



## Hotel Prices

The annual rate of the Hotel Prices Index (HPI) registered  $-1.1\%$  in May, 3.0 points more than that of the previous month, and 0.4 points less than that registered the previous year.



The four Autonomous Communities (Cataluña, Illes Balears, Andalucía and Canarias) that carried 69.7% of the total load of the HPI in the month of May, showed negative annual rates, as compared with the same month of the previous year.

Cataluña, which carried the greatest load in the weighting structure this month, presented an annual rate of  $-2.5\%$ , 3.3 points higher than that estimated in April. Hotel prices experienced an increase of 5.4% in Illes Balears, 4.3 points higher as compared with the previous month. Andalucía registered a rate of  $-2.8\%$ , as compared with the  $-5.7\%$  registered in the previous month. In Canarias, the variation in prices is of 0.9%, 1.6 points higher as compared with the previous month.

The greatest decreases in hotel prices by hotel category were registered in three and two-silver-star hotels (with a  $-4.2\%$  rate), in two-gold-star hotels ( $-2.3\%$ ) and in three-gold-star hotels ( $-1.7\%$ ).

One-gold-star establishments ( $-1.0\%$ ), five-gold-star establishments ( $-0.4\%$ ) and one-silver-star establishments ( $-0.1\%$ ) registered negative annual rates. The only category that registered a positive evolution is that of the three-gold-star establishments (0.1%).

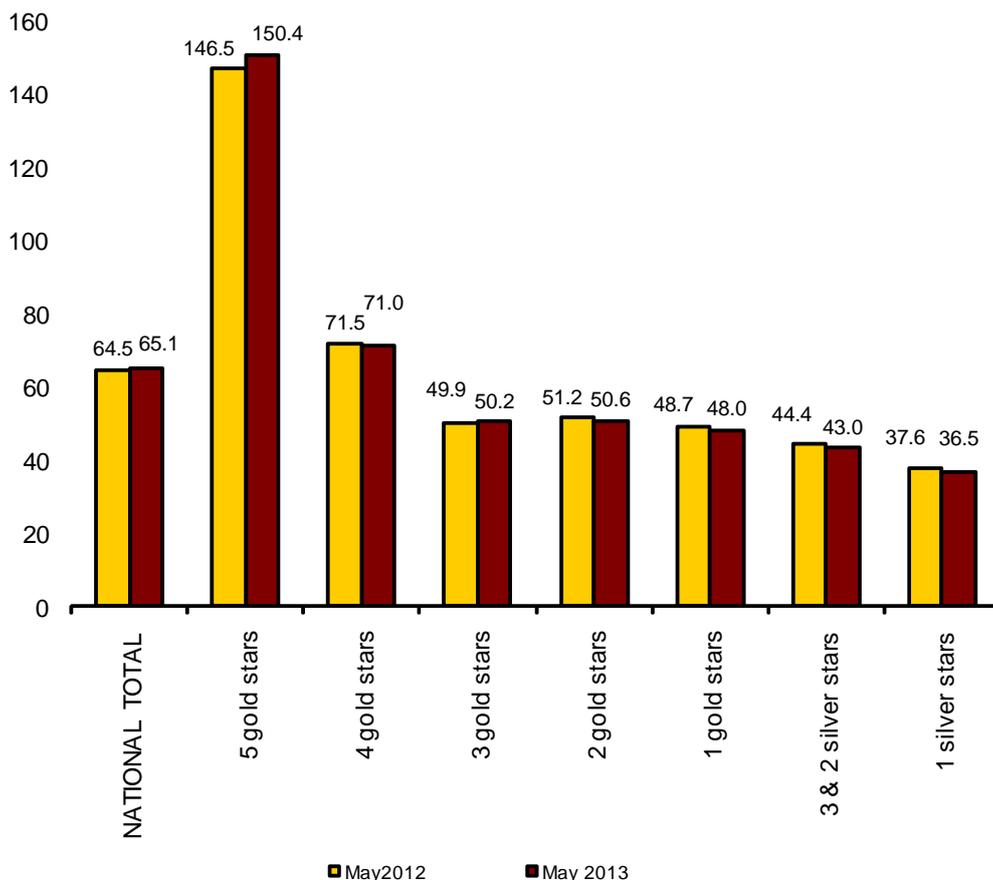
### Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in May was 65.1 euros, an increase of 0.8%, as compared with the same month in 2012.

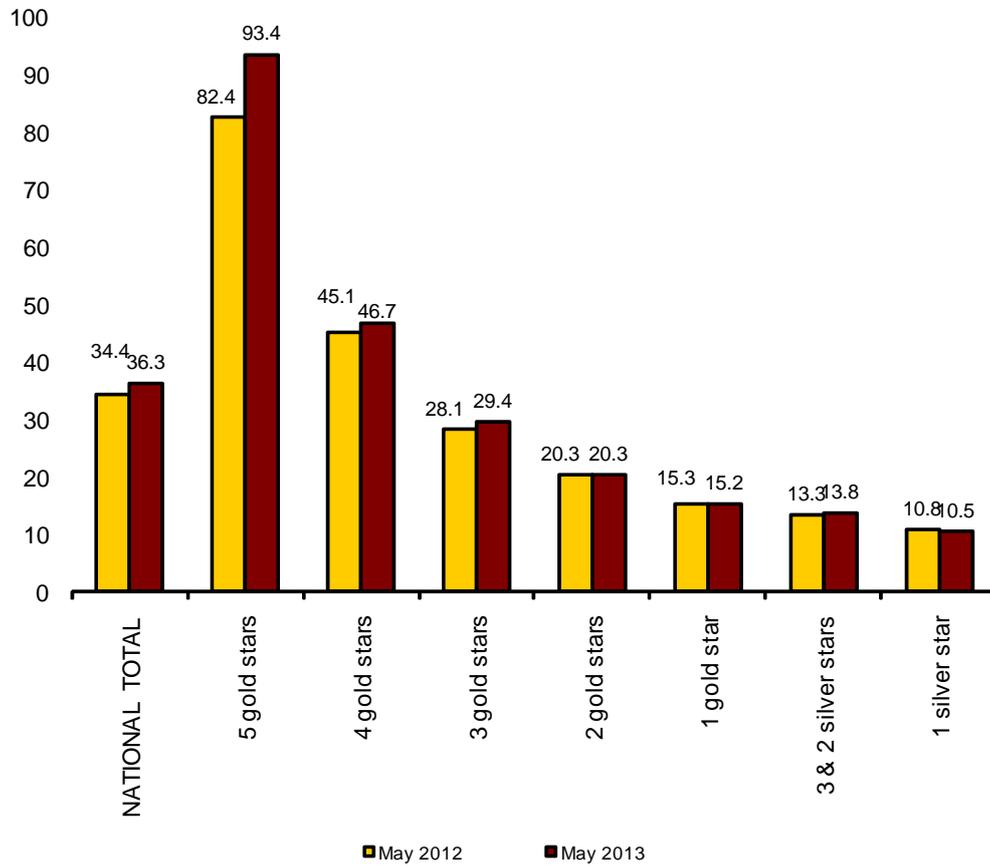
In turn, the average daily income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 36.3 euros, with a decrease of 5.4% as compared with May 2012.

By category, the average invoicing was 150.4 euros for five-star hotels, 71.0 euros for four-star hotels and 50.2 euros for three-star hotels. Income per available room for the same categories was 93.4, 46.7 and 29.4 euros, respectively.

**Average daily rate (ADR)**



**Revenue per available room (RevPAR)**



## Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

May 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	
<b>TOTAL</b>	<b>8,124,493</b>	<b>3,673,598</b>	<b>4,450,895</b>	<b>26,363,004</b>	<b>8,185,155</b>	<b>18,177,850</b>	<b>3.24</b>
HOTELS: Golden stars							
Five	429,560	125,282	304,277	1,428,267	269,282	1,158,985	3.32
Four	3,670,990	1,614,053	2,056,937	12,494,012	3,539,902	8,954,111	3.40
Three	2,526,660	1,107,745	1,418,915	8,901,191	2,691,914	6,209,277	3.52
Two	603,819	345,226	258,593	1,492,808	712,052	780,756	2.47
One	201,672	115,188	86,484	426,227	217,353	208,874	2.11
INNS: Silver stars							
Two and three	368,939	210,536	158,403	889,077	400,650	488,427	2.41
One	322,852	155,567	167,285	731,422	354,002	377,420	2.27
Interannual rate	5.17	1.74	8.17	7.04	4.31	8.32	1.78
Cumulative interannual rate	-2.54	-6.80	2.64	-1.04	-7.38	3.17	1.54

### 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	
<b>TOTAL</b>	<b>15,714</b>	<b>1,631,844</b>	<b>51.32</b>	<b>57.57</b>	<b>56.18</b>	<b>201,228</b>
HOTELS: Golden stars						
Five	267	82,722	55.09	62.18	62.26	23,618
Four	2,207	680,099	58.45	65.30	65.82	94,092
Three	2,802	505,250	55.80	61.14	59.63	55,524
Two	1,965	126,266	36.99	44.73	40.93	10,376
One	1,195	48,617	28.10	34.55	32.41	3,914
INNS: Silver stars						
Two and three	3,145	99,736	28.53	33.81	31.96	7,479
One	4,133	89,155	26.41	31.44	30.06	6,225
Interannual rate	-1.08	0.45	6.07	4.82	4.84	-1.32

### 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	Per rooms at weekend		

#### Tourist areas with a greater level of occupancy per month

Barcelona	120,027	528,527	239,235	1,420,350	72.82	81.85	82.51	2.56	12,244
Palma - Calvià	42,147	330,805	153,790	1,709,193	69.70	72.27	71.60	5.00	10,711
Isla de Mallorca	70,964	774,032	259,046	4,761,799	68.37	69.53	71.97	5.94	29,819
Sur de Tenerife	39,473	152,672	167,229	1,218,634	68.00	71.12	75.16	7.21	11,858
Sur de Gran Canaria	31,841	92,514	134,521	814,948	66.15	67.47	72.53	7.64	7,958
Costa Blanca	173,608	155,427	694,176	704,432	66.00	75.57	69.50	4.25	7,886
Isla de Lanzarote	19,685	66,411	106,420	568,894	64.69	65.98	72.64	7.84	5,023
Isla de Tenerife	72,160	173,467	314,780	1,365,008	63.73	66.81	69.95	6.84	14,953

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

Costa del Sol	148,214	301,934	360,465	1,258,199	61.96	68.05	67.71	3.60	10,935
Isla de Gran Canaria	49,759	98,417	177,759	835,879	61.78	63.75	68.39	6.84	8,914
Costa Brava	100,099	205,704	230,154	764,085	46.58	53.89	47.88	3.25	6,707
Costa Daurada	104,096	155,357	274,315	692,958	57.96	59.71	56.57	3.73	4,899
Islas de Ibiza-Formentera	30,044	147,344	115,876	821,946	58.30	58.26	59.36	5.29	6,067
Isla de Fuerteventura	8,547	79,048	32,158	695,903	53.61	54.78	61.97	8.31	6,167
Costa de la Luz de Cádiz	110,431	63,019	236,242	269,551	42.84	55.92	51.29	2.92	4,344
Isla de Menorca	10,180	48,404	31,367	323,716	45.41	40.04	44.98	6.06	2,482

#### Tourist sites with a greater level of occupancy per month

Benidorm	90,808	98,165	510,015	523,641	80.53	88.32	82.47	5.47	5,034
Torremolinos	34,232	93,486	107,659	387,154	78.25	81.18	80.35	3.87	2,514
Santa Margalida	2,294	42,258	3,978	330,232	76.39	80.60	80.39	7.50	1,877
Son Servera	245	30,621	1,740	231,470	75.04	57.49	63.57	7.56	1,194
Muro	4,906	54,321	12,024	376,514	75.03	77.62	85.35	6.56	2,212
Barcelona	111,614	506,383	218,232	1,366,000	73.64	82.29	83.29	2.56	11,806
Palma	33,946	173,646	98,254	796,379	73.53	81.94	77.93	4.31	5,338
Córdoba	50,348	48,010	85,831	72,246	73.18	84.01	77.19	1.61	863
Arona	9,846	46,051	42,794	371,836	71.83	70.81	75.58	7.42	3,065
Alcúdia	6,334	56,094	26,528	387,156	71.23	68.94	71.77	6.63	2,931

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

Madrid	326,511	365,376	543,119	818,484	53.48	65.34	65.36	1.97	11,903
Calvià	8,718	149,070	50,538	855,806	65.22	63.17	65.19	5.74	5,021
San Bartolomé de Tirajana	25,485	70,757	112,290	635,682	66.08	67.11	73.03	7.77	6,527
Adeje	18,115	81,080	78,697	668,466	68.77	72.58	79.18	7.53	6,507
Salou	42,142	99,445	136,408	487,829	66.13	66.21	63.96	4.41	2,739
Lloret de Mar	26,853	87,923	97,775	409,867	58.30	63.03	57.61	4.42	2,208
Pájara	4,347	51,738	18,339	469,885	53.40	53.11	60.55	8.71	4,250
Sevilla	85,328	120,230	154,092	250,614	66.90	77.25	75.25	1.97	2,885
Sant Llorenç des Cardassar	1,513	50,062	5,555	380,610	58.29	54.25	62.43	7.49	2,274
Yaiza	9,868	32,230	58,867	273,494	68.93	71.56	77.21	7.89	2,534

\* 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	%
<b>TOTAL</b>	<b>8,124,493</b>	<b>100.00</b>	<b>26,363,004</b>	<b>100.00</b>
Residents in Spain	3,673,598	45.22	8,185,155	31.05
Residents abroad	4,450,895	54.78	18,177,850	68.95
Total Residents abroad	4,450,895	100.00	18,177,850	100.00
Total Residents in U.E. (without Spain)	3,311,692	74.41	15,042,906	82.75
- Germany	813,062	18.27	4,631,048	25.48
- Austria	42,918	0.96	156,011	0.86
- Belgium	113,816	2.56	533,176	2.93
- Denmark	40,519	0.91	187,006	1.03
- Finland	24,223	0.54	93,481	0.51
- France	580,104	13.03	1,671,183	9.19
- Greece	9,573	0.22	21,901	0.12
- Ireland	67,031	1.51	284,576	1.57
- Italy	178,905	4.02	481,183	2.65
- Luxembourg	10,719	0.24	58,947	0.32
- Netherlands	183,048	4.11	817,128	4.50
- Poland	47,699	1.07	205,667	1.13
- Portugal	75,448	1.70	162,042	0.89
- United Kingdom	972,846	21.86	5,147,731	28.32
- Czech Republic	14,686	0.33	66,364	0.37
- Sweden	78,162	1.76	331,635	1.82
- Rest of UE*	58,935	1.32	193,827	1.07
Norway	52,912	1.19	244,363	1.34
Russia	134,670	3.03	617,879	3.40
Switzerland	77,655	1.74	301,974	1.66
Rest of Europe	85,733	1.93	280,496	1.54
Japan	55,249	1.24	92,170	0.51
United States of America	222,850	5.01	486,682	2.68
Rest of America	235,022	5.28	522,516	2.87
African's countries	39,610	0.89	87,441	0.48
Rest of the world	235,501	5.29	501,423	2.76

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

## Hotel Price Index (HPI). 2008 Base

May 2013

Provisional data

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

	Index	Interannual variation rate
<b>TOTAL</b>	<b>89.9</b>	<b>-1.1</b>
Andalucía	87.2	-2.8
Aragón	74.4	-2.2
Asturias, Principado de	83.2	-4.6
Balears, Illes	101.0	5.4
Canarias	98.5	0.9
Cantabria	84.3	-9.2
Castilla y León	85.4	-5.4
Castilla - La Mancha	85.3	-5.6
Cataluña	89.6	-2.5
Comunitat Valenciana	86.6	-1.7
Extremadura	86.6	-2.7
Galicia	89.8	-3.6
Madrid, Comunidad de	76.1	-6.7
Murcia, Región de	76.7	-2.0
Navarra, Comunidad Foral de	82.2	-6.5
País Vasco	88.8	0.3
Rioja, La	83.2	-3.1
Ceuta	101.8	-3.4
Melilla	98.2	3.8

### National General Index and breakdown by categories

	Index	Interannual variation rate
<b>TOTAL</b>	<b>89.9</b>	<b>-1.1</b>
<b>HOTELS: Gold stars</b>		
Five	87.3	-0.4
Fourth	88.0	-1.7
Three	92.4	0.1
Two	91.5	-2.3
One	99.1	-1.0
<b>HOSTALS: Silver stars</b>		
Three and two	89.1	-4.2
One	97.1	-0.1

## Indicators on the Profitability of the Hotel Sector

May 2013

Provisional data

### National ADR and RevPAR<sup>(\*)</sup> and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Variation Rate variation	RevPar (in euros)	Variation Rate variation
<b>TOTAL</b>	<b>65.1</b>	<b>0.8</b>	<b>36.3</b>	<b>5.4</b>
Andalucía	65.8	-0.7	36.0	5.8
Aragón	50.9	1.9	16.2	6.6
Asturias, Principado de	49.2	-7.2	15.1	-9.2
Balears, Illes	59.4	6.4	39.1	14.8
Canarias	71.7	3.9	48.4	9.6
Cantabria	54.2	-7.2	18.8	-4.9
Castilla y León	51.6	-4.8	18.2	-0.9
Castilla - La Mancha	55.0	-3.1	15.9	-5.3
Cataluña	74.6	1.2	43.9	4.2
Comunitat Valenciana	52.3	-2.0	30.6	7.9
Extremadura	54.3	-1.6	19.5	-4.1
Galicia	49.9	-4.2	15.9	0.9
Madrid, Comunidad de	77.5	-5.5	46.4	-12.7
Murcia, Región de	50.4	-1.0	23.8	12.3
Navarra, Comunidad Foral de	58.3	-6.1	23.9	-2.4
País Vasco	71.4	4.4	40.4	0.9
Rioja, La	60.4	4.1	31.1	4.8
Ceuta	66.3	-7.1	38.0	6.2
Melilla	63.1	-1.7	29.5	-18.3

### National ADR and RevPar<sup>(\*)</sup> and breakdown by categories

	ADR (in euros)	Variation Rate interannual	RevPar (in euros)	Variation Rate interannual
<b>TOTAL</b>	<b>65.1</b>	<b>0.8</b>	<b>36.3</b>	<b>5.4</b>
<b>HOTELS: Gold stars</b>				
Five	150.4	2.6	93.4	13.4
Four	71.0	-0.7	46.7	3.4
Three	50.2	0.6	29.4	4.6
Two	50.6	-1.2	20.3	-0.2
One	48.0	-1.3	15.2	-0.4
<b>GUESTHOUSES: Silver stars</b>				
Three and two	43.0	-3.1	13.8	3.3
One	36.5	-2.8	10.5	-2.6

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