

23 October 2013

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

**Overnight stays in hotel establishments increase 2.0% in September, as compared with the same month of 2012**

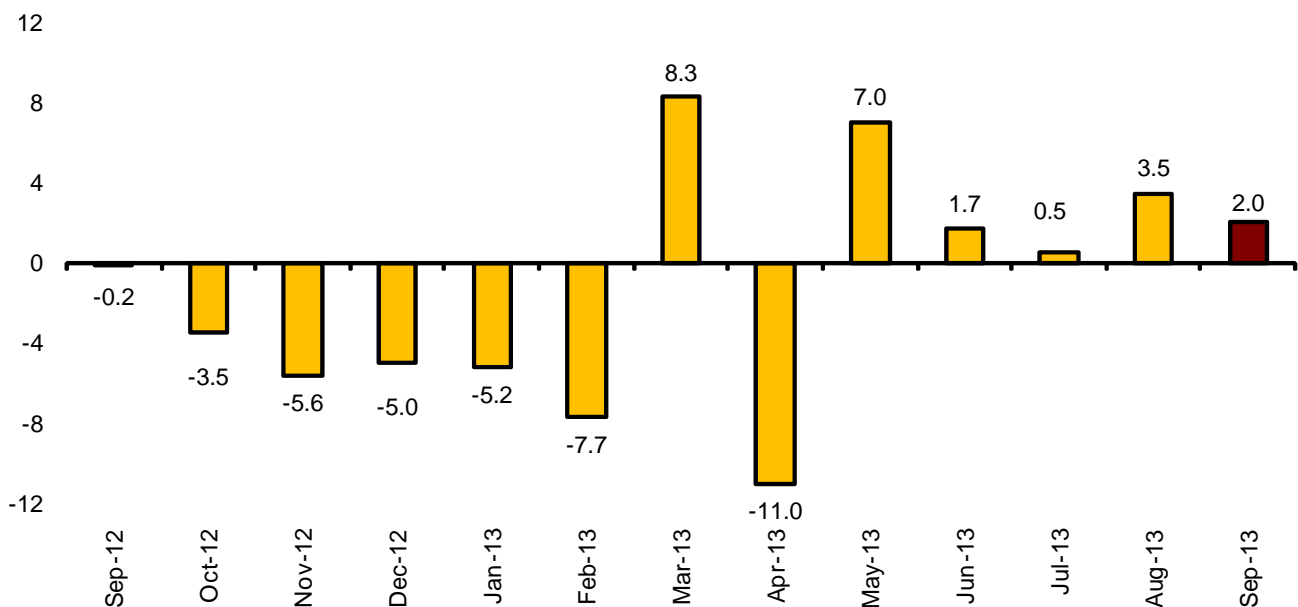
**Hotels earn 48.6 euros per available room and invoice an average of 72.4 euros per occupied room**

During the month of September, more than 32.6 million overnight stays were recorded in hotel establishments. This figure was 2.0% higher than that registered during the same month of 2012. Overnight stays for residents in Spain decreased 0.2%, whereas that for non-residents increased 3.0%.

The average stay increased 0.7%, as compared with September 2012, standing at 3.7 nights per guest.

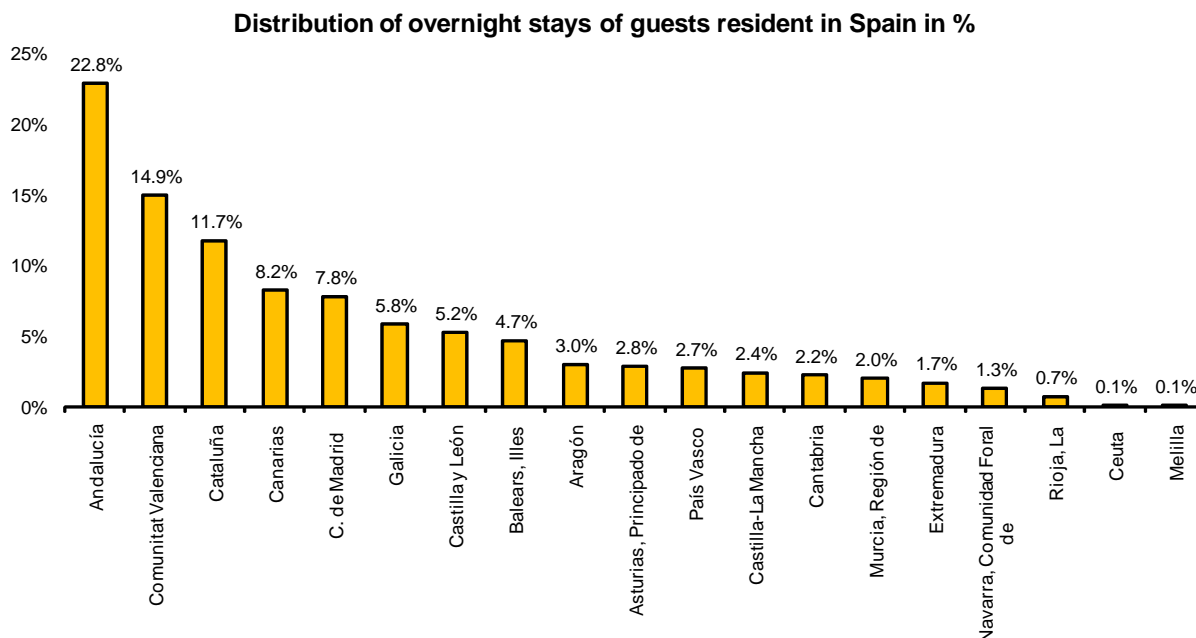
During the first nine months of 2013, overnight stays increased 0.8%, as compared with the same period of the previous year.

**Interannual rates of overnight stays in %**

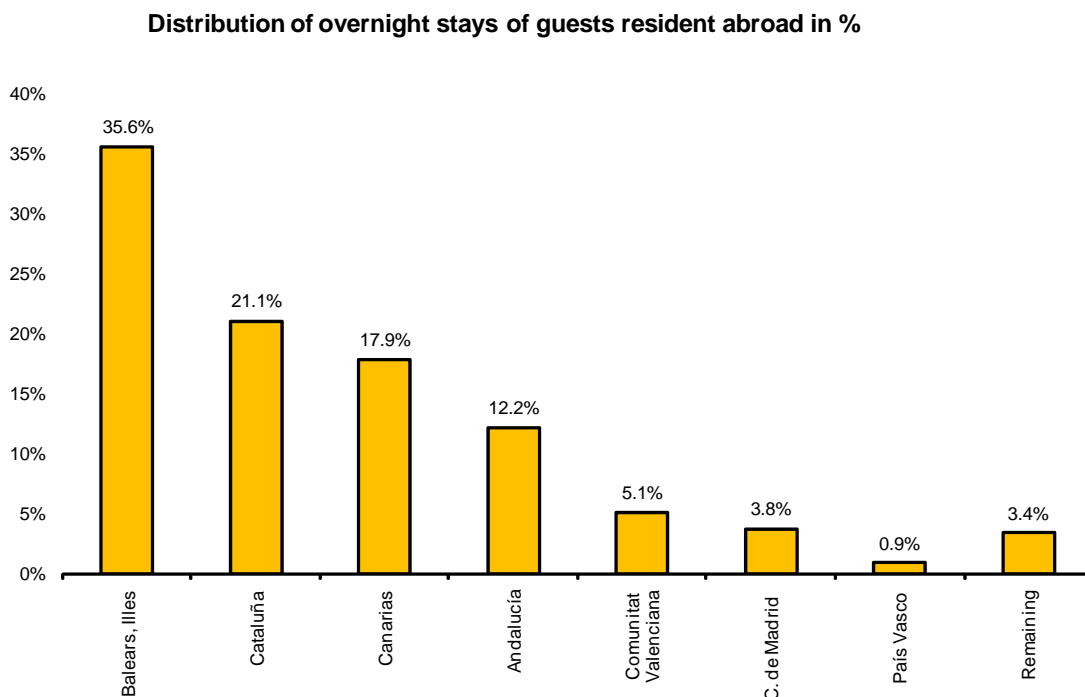


## Main destinations

In September, Andalucía, Comunitat Valenciana, Cataluña and Canarias were the main destinations of guests resident in Spain, with interannual rates for overnight stays of 7.6%, -1.5%, -10.7% and -6.8%, respectively.



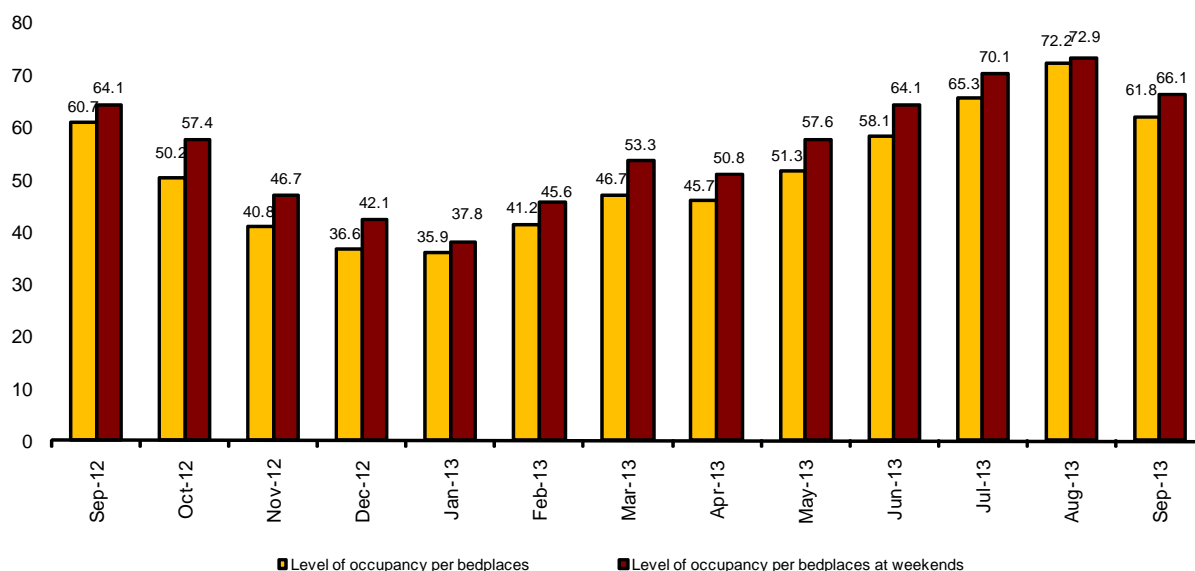
The main destination chosen by non-residents was Illes Balears, with a 35.6% of the total amount of overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 0.6%, as compared with the same month of 2012. Followed by Cataluña, (with a 21.1% of the total), and Canarias (17.9%), where overnight stays increased 2.7% and 5.0%, respectively.



## Hotel Occupancy

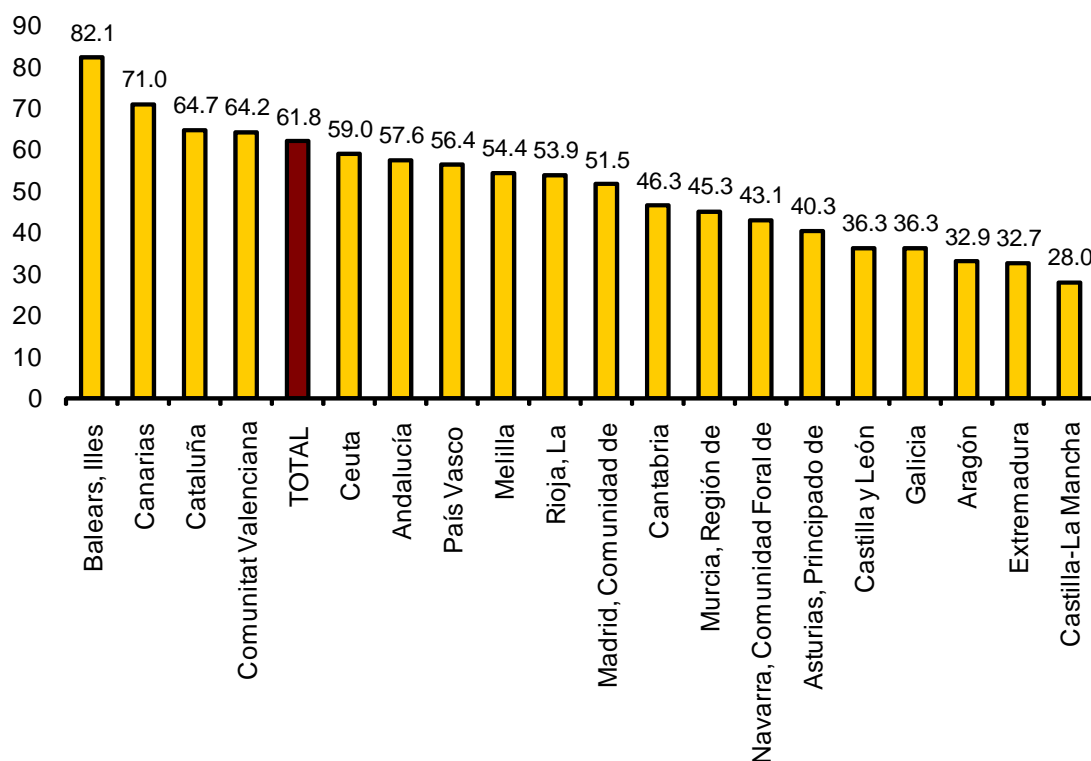
In terms of occupancy, 61.8% of the available bedplaces were occupied in September, with a 1.8% increase. The weekend occupancy rate by bedplaces increased 3.2% and stood at 66.1%.

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



Illes Balears registered the greatest occupancy rate by bedplaces in September (82.1%), followed by Canarias (71.0%) and Cataluña (64.7%).

**Level of occupancy per bedplaces by Autonomous Community**



By tourist areas, the island Mallorca registered the highest occupancy rate by bedplaces in September (83.7%), while the coast of Guipuzkoa registered the highest weekend occupancy rate by bedplaces (84.7%). In addition, the island of Mallorca, registered the highest number of overnight stays, with more than 6.4 millions.

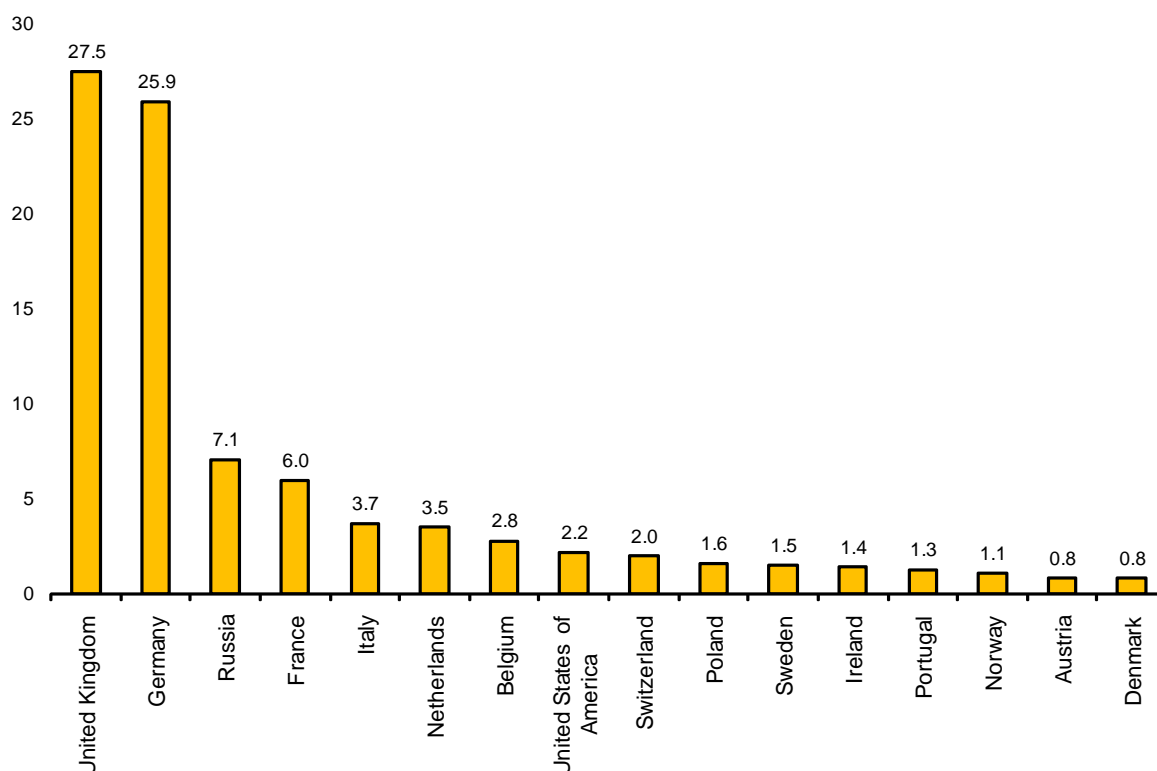
The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Son Servera reached both the highest occupancy rate by bedplaces (92.6%) and the highest weekend occupancy (92.9%).

### Overnight stays according to the country of origin of the guests

Guests from the United Kingdom and Germany registered 27.5% and 25.9%, respectively, of the total of overnight stays by non-residents in September. The British market experienced a 3.2% annual increase, while the German market increased 1.7%.

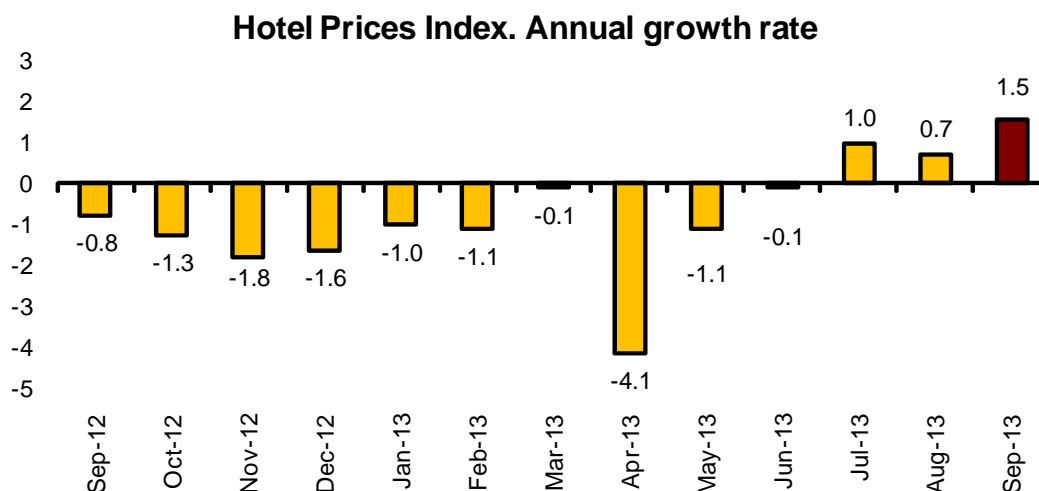
Overnight stays of guests from Russia, France and Italy (the following countries of origin) registered annual rates of 15.3%, 2.7% and -4.2%, respectively.

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



## Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at 1.5% in September, that is, 0.8 points more than that of the previous month, and 2.3 points more than that registered the previous year.



Illes Balears, Cataluña, Andalucía and Canarias were the Autonomous Communities that carried the greatest weight of total load of the HPI in the month of September (together they represent 73.8% of the total weight). Hotel prices increased 4.8% in the annual rate in Cataluña, 4.3% in Illes Balears and 2.1% in Canarias. In turn, they decreased 1.4% in Andalucía.

By hotel category, the decreases in hotel prices were registered in three and two-silver-star hotels (–3.9%), in one-golden-star hotels (–1.9%) and in two-golden-star hotels (–0.5%).

The remaining categories registered positive annual rates: three-golden-star establishments (3.7%), five-golden-star establishments (1.2%), four-golden-star establishments (0.9%) and one-silver-stars establishments (0.4%).

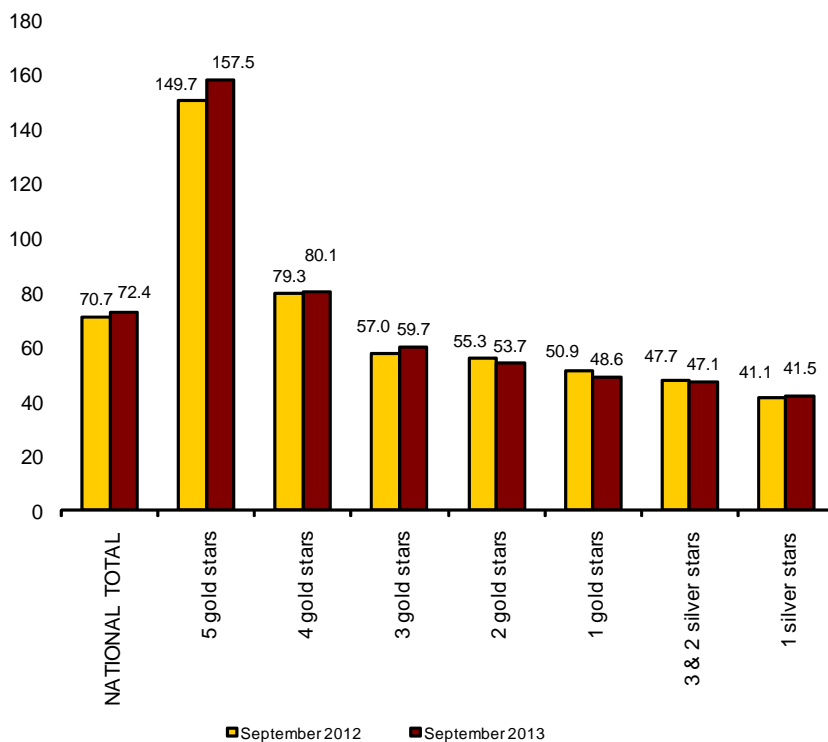
## Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in September was 72.4 euros, a 2.4% increase, as compared with the same month in 2012.

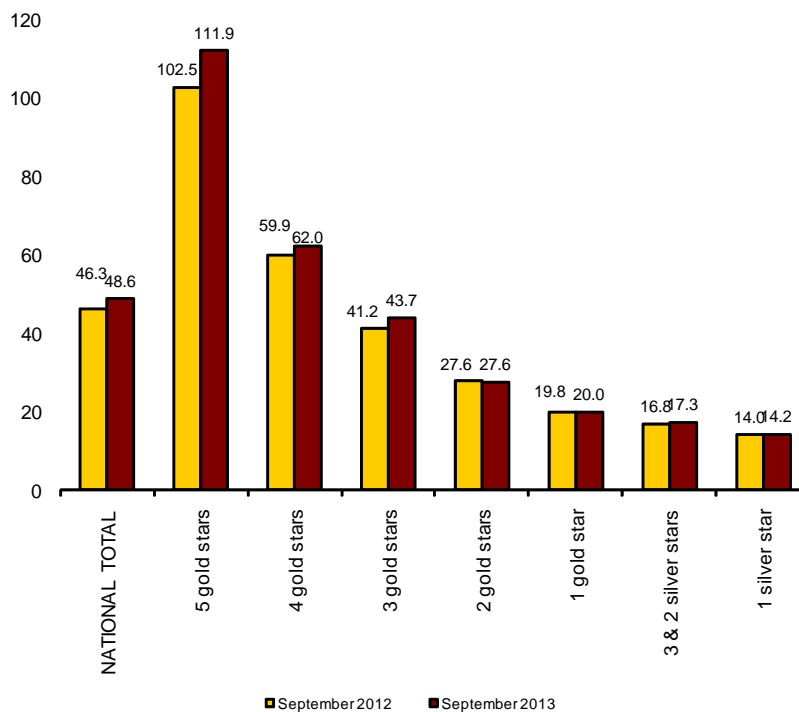
In turn, the average daily income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 48.6 euros, with a 5.1% increase as compared with September 2012.

By category, the average invoicing was 157.5 euros for five-star hotels, 80.1 euros for four-star hotels and 59.7 euros for three-star hotels. Income per available room for the same categories was 111.9, 62.0 and 43.7 euros, respectively.

### Average daily rate (ADR)



### Revenue per available room (RevPAR)



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

September 2013

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>8,869,420</b>	<b>4,048,296</b>	<b>4,821,124</b>	<b>32,690,944</b>	<b>9,943,284</b>	<b>22,747,660</b>	<b>3.69</b>
HOTELS: Golden stars							
Five	430,147	140,933	289,214	1,537,951	333,791	1,204,159	3.58
Four	3,943,494	1,747,788	2,195,706	15,120,488	4,426,559	10,693,929	3.83
Three	2,774,634	1,185,755	1,588,879	11,477,581	3,084,580	8,393,001	4.14
Two	693,486	398,193	295,293	2,021,883	905,147	1,116,736	2.92
One	251,292	148,918	102,374	625,208	310,686	314,522	2.49
INNS: Silver stars							
Two and three	412,419	246,210	166,209	1,035,433	492,313	543,120	2.51
One	363,949	180,499	183,450	872,400	390,207	482,193	2.40
Annual rate	1.29	0.69	1.80	2.01	-0.19	3.01	0.71
Cumulative annual rate	-0.01	-2.55	2.66	0.79	-3.25	3.10	0.80

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

Category	Estimated open establishments	Estimated bedplaces	Occupancy rate			Employed personnel
			Of bedplaces	Of bedplaces at weekend	Of bedrooms	
<b>TOTAL</b>	<b>16,419</b>	<b>1,731,431</b>	<b>61.81</b>	<b>66.14</b>	<b>67.36</b>	<b>227,190</b>
HOTELS: Golden stars						
Five	269	83,245	60.90	66.66	71.14	24,811
Four	2,298	716,764	68.95	73.26	77.42	105,559
Three	2,971	541,608	69.17	72.35	73.70	64,425
Two	2,098	138,735	48.12	54.99	51.83	12,305
One	1,299	55,538	37.17	42.53	41.36	4,722
INNS: Silver stars						
Two and three	3,253	103,220	33.26	38.80	36.96	8,289
One	4,232	92,320	31.37	35.51	34.85	7,079
Annual rate	-1.00	0.38	1.78	3.17	2.67	-1.48

### 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 bedplaces	Of bedrooms	at weekend		
Tourist area with a greater occupancy rate per month									
Isla de Mallorca	54,444	885,380	186,447	6,226,306	83.68	84.25	89.58	6.82	35,399
Palma - Calvià	36,845	370,436	113,355	2,172,368	80.79	84.47	87.59	5.61	12,981
Islas de Ibiza-Formentera	39,824	216,017	168,083	1,351,322	80.74	79.29	81.91	5.94	8,825
Isla de Lanzarote	23,230	69,289	147,069	632,002	76.64	73.94	85.09	8.42	5,351
Costa Blanca	177,166	158,619	758,668	837,461	76.11	81.31	78.27	4.75	8,759
Costa de Gipuzkoa	31,121	37,447	61,302	79,836	75.66	84.68	83.97	2.06	1,134
Costa Daurada	96,422	160,954	304,956	1,108,646	74.93	78.24	80.80	5.49	6,204
Sur de Tenerife	35,524	156,011	148,574	1,348,434	74.86	75.32	83.16	7.82	12,123

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

Costa del Sol	167,600	277,587	517,594	1,378,759	71.27	76.85	80.85	4.26	12,554
Isla de Tenerife	71,904	183,885	302,009	1,562,948	71.54	72.90	78.38	7.29	15,337
Barcelona	107,185	523,930	198,740	1,437,506	71.41	73.69	84.69	2.59	12,386
Costa Brava	112,039	247,311	254,216	1,182,135	62.11	65.68	64.63	4.00	8,266
Isla de Gran Canaria	60,710	110,200	251,904	968,795	68.21	70.78	75.69	7.14	10,188
Sur de Gran Canaria	42,779	102,167	200,700	940,893	71.87	73.54	79.30	7.88	9,270
Isla de Fuerteventura	18,101	107,992	83,192	864,097	73.91	71.17	81.55	7.51	6,729
Costa de la Luz de Cádiz	125,731	79,388	358,710	377,266	59.66	61.95	66.99	3.59	5,636

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

Son Servera	248	32,479	479	274,871	92.62	92.86	94.80	8.41	1,273
Santa Margalida	4,468	42,575	10,416	385,253	91.96	87.54	89.17	8.41	1,967
Alcúdia	1,783	66,515	7,754	535,223	91.75	91.48	95.60	7.95	3,109
Sant Josep de Sa Talaia	8,704	81,872	32,716	378,697	91.71	82.99	82.93	4.54	3,202
Muro	1,289	56,207	6,038	481,203	89.78	87.12	93.23	8.47	2,550
Benidorm	87,282	97,951	504,213	617,324	88.65	91.01	88.63	6.05	5,270
Eivissa	11,642	42,907	37,255	235,753	86.49	87.82	88.37	5.00	1,780
Salou	31,498	94,986	127,566	751,012	85.62	87.54	90.71	6.95	3,268
Malgrat de Mar	4,216	21,199	12,070	160,508	84.66	81.17	84.55	6.79	612
Torremolinos	43,215	61,721	157,591	388,073	83.63	86.30	90.09	5.20	2,806

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

Barcelona	99,023	503,921	181,540	1,383,901	72.37	74.46	85.26	2.60	11,962
Madrid	325,586	356,493	570,088	805,878	55.81	65.47	68.85	2.02	11,384
Calvià	7,040	169,861	32,295	1,172,673	81.28	82.85	87.75	6.81	6,351
Palma	29,752	191,038	73,937	930,741	80.10	86.50	87.41	4.55	6,103
San Bartolomé de Tirajana	34,711	75,768	161,435	712,456	73.36	74.68	80.01	7.91	7,402
Adeje	16,314	81,116	73,815	719,293	75.04	76.33	84.63	8.14	6,700
Lloret de Mar	22,799	110,755	55,626	637,140	75.18	76.29	78.08	5.19	2,691
Pájara	9,245	65,525	51,266	603,627	79.73	77.03	84.38	8.76	4,507
Sant Llorenç des Cardassar	699	62,685	4,082	548,880	83.29	81.15	91.76	8.72	3,065
Arona	7,742	48,159	40,170	421,920	79.95	80.42	87.49	8.27	3,061

\* 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>8,869,420</b>	<b>100.00</b>	<b>32,690,944</b>	<b>100.00</b>
Residents in Spain	4,048,296	45.64	9,943,284	30.42
Residents abroad	4,821,124	54.36	22,747,660	69.58
Total Residents abroad	4,821,124	100.00	22,747,660	100.00
Total Residents in E.U. (without Spain)	3,481,003	72.20	18,100,313	79.57
- Germany	912,504	18.93	5,881,840	25.86
- Austria	41,717	0.87	191,311	0.84
- Belgium	123,575	2.56	646,129	2.84
- Denmark	45,442	0.94	184,939	0.81
- Finland	22,729	0.47	85,140	0.37
- France	452,051	9.38	1,367,024	6.01
- Greece	9,812	0.20	27,276	0.12
- Ireland	74,572	1.55	322,775	1.42
- Italy	228,461	4.74	837,416	3.68
- Luxembourg	7,784	0.16	53,737	0.24
- Netherlands	166,692	3.46	806,279	3.54
- Poland	72,186	1.50	361,302	1.59
- Portugal	107,633	2.23	287,890	1.27
- United Kingdom	1,035,357	21.48	6,255,923	27.50
- Czech Republic	23,114	0.48	140,345	0.62
- Sweden	76,624	1.59	350,814	1.54
- Other EU countries*	80,748	1.67	300,173	1.32
Norway	58,759	1.22	253,568	1.11
Russia	228,252	4.73	1,623,627	7.14
Switzerland	98,262	2.04	450,300	1.98
Rest of Europe	99,155	2.06	381,939	1.68
Japan	62,336	1.29	112,572	0.49
United States of America	222,427	4.61	498,174	2.19
Rest of America	257,794	5.35	589,224	2.59
Africa	45,748	0.95	110,744	0.49
Other countries	267,389	5.55	627,199	2.76

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

## Hotel Price Index (HPI). 2008 Base

September 2013

Provisional data

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

	Index	Annual growth rate
<b>TOTAL</b>	<b>93.3</b>	<b>1.5</b>
Andalucía	86.5	-1.4
Aragón	64.9	0.6
Asturias, Principado de	87.8	0.5
Balears, Illes	104.2	4.3
Canarias	98.8	2.1
Cantabria	85.7	-3.7
Castilla y León	86.2	-3.7
Castilla - La Mancha	81.9	-6.3
Cataluña	98.4	4.8
Comunitat Valenciana	86.5	-0.2
Extremadura	85.2	-4.1
Galicia	89.3	-1.8
Madrid, Comunidad de	76.9	-4.4
Murcia, Región de	79.3	-2.2
Navarra, Comunidad Foral de	82.8	-5.8
País Vasco	96.5	0.0
Rioja, La	88.3	0.3
Ceuta	105.9	-4.1
Melilla	97.7	0.8

### National General Index and breakdown by categories

	Index	Annual growth rate
<b>TOTAL</b>	<b>93.3</b>	<b>1.5</b>
<b>HOTELS: Gold stars</b>		
Five	88.0	1.2
Fourth	91.7	0.9
Three	96.9	3.7
Two	92.5	-0.5
One	98.8	-1.9
<b>HOSTALS: Silver stars</b>		
Three and two	89.4	-3.9
One	98.3	0.4

## Indicators on the Profitability of the Hotel Sector

September 2013

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>72.4</b>	<b>2.4</b>	<b>48.6</b>	<b>5.1</b>
Andalucía	73.6	-2.6	48.2	3.8
Aragón	50.9	-0.4	19.1	5.9
Asturias, Principado de	55.0	-4.1	24.2	2.5
Balears, Illes	74.4	4.9	63.9	6.1
Canarias	75.3	4.5	58.9	6.8
Cantabria	59.1	-4.4	28.0	7.0
Castilla y León	53.4	-3.0	21.3	-1.4
Castilla - La Mancha	54.8	-4.8	17.8	-1.8
Cataluña	79.1	8.5	56.5	10.1
Comunitat Valenciana	64.5	-2.1	43.1	1.7
Extremadura	53.1	-1.3	19.0	-2.8
Galicia	53.6	-1.1	21.5	3.0
Madrid, Comunidad de	75.1	-5.4	47.6	-6.4
Murcia, Región de	60.9	0.5	29.2	7.2
Navarra, Comunidad Foral de	60.7	-3.9	29.2	3.1
País Vasco	80.2	1.0	53.5	-1.7
Rioja, La	61.8	-0.5	38.0	8.1
Ceuta	68.3	-4.8	35.1	-0.9
Melilla	64.5	3.0	43.0	12.4

### 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>72.4</b>	<b>2.4</b>	<b>48.6</b>	<b>5.1</b>
<b>HOTELS: Gold stars</b>				
Five	157.5	5.3	111.9	9.2
Four	80.1	1.1	62.0	3.5
Three	59.7	4.6	43.7	6.2
Two	53.7	-3.0	27.6	-0.3
One	48.6	-4.6	20.0	1.2
<b>GUESTHOUSES: Silver stars</b>				
Three and two	47.1	-1.3	17.3	3.4
One	41.5	0.9	14.2	1.8

(\*) ADR: Average Daily Rate

RevPAR: Revenue per Available Room