

23 January 2012

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)*
December 2012. *Provisional data*

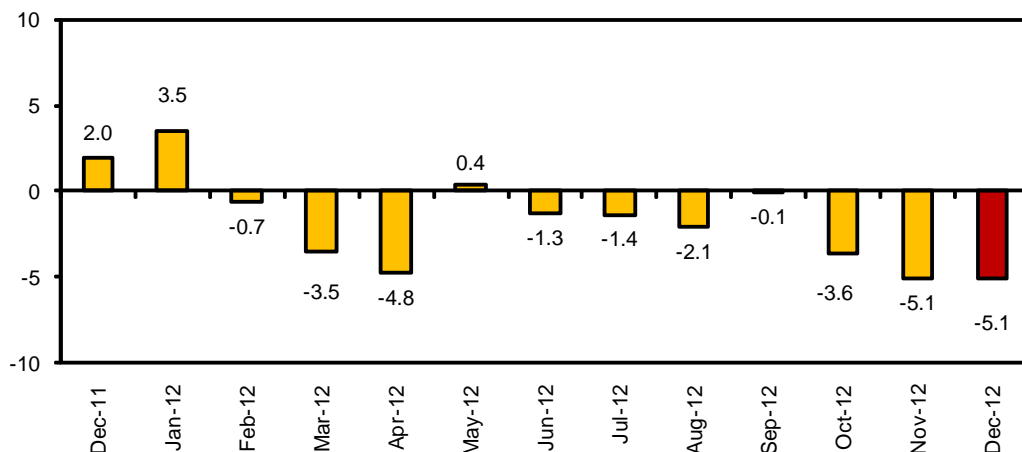
Overnight stays in hotel establishments decrease 5.1% in December, as compared with the same month in 2011

Hotels earn 28.1 euros per available room and invoice an average of 70.3 euros per occupied room

During the month of December, 12.3 million overnight stays were recorded in hotel establishments, indicating a 5.1% decrease as compared with the same month in 2011. Overnight stays for residents decreased 13.0%, whilst for non-residents experienced an increase of 1.7%.

The average stay increased 0.6%, standing at 2.9 nights per guest.

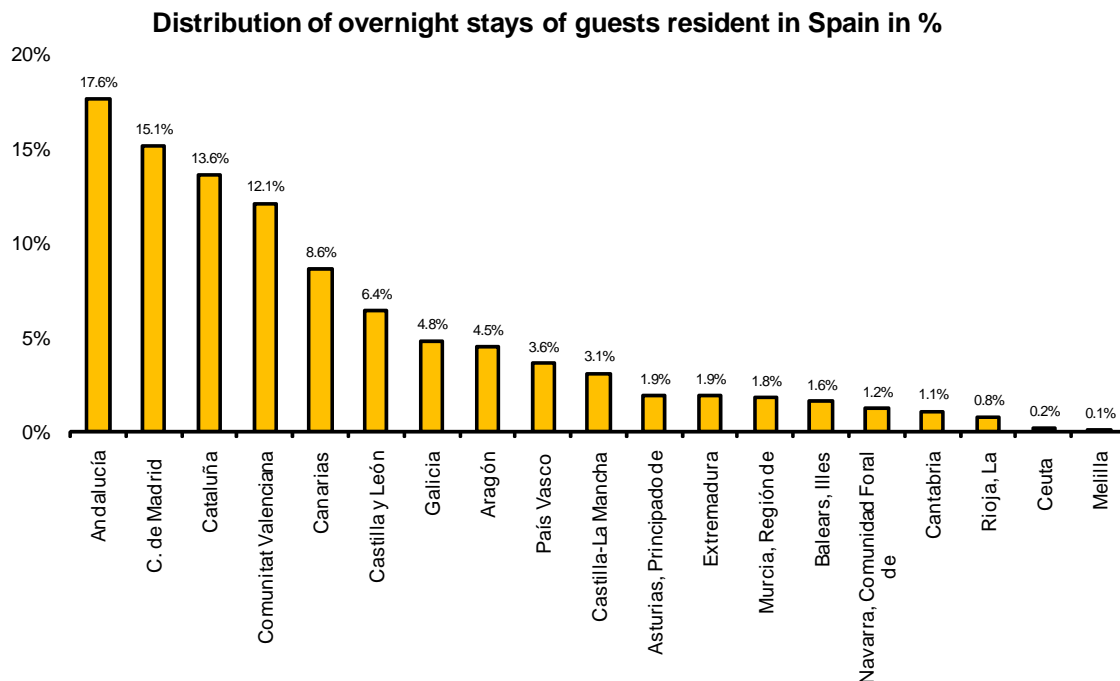
Interannual rates of overnight stays in %



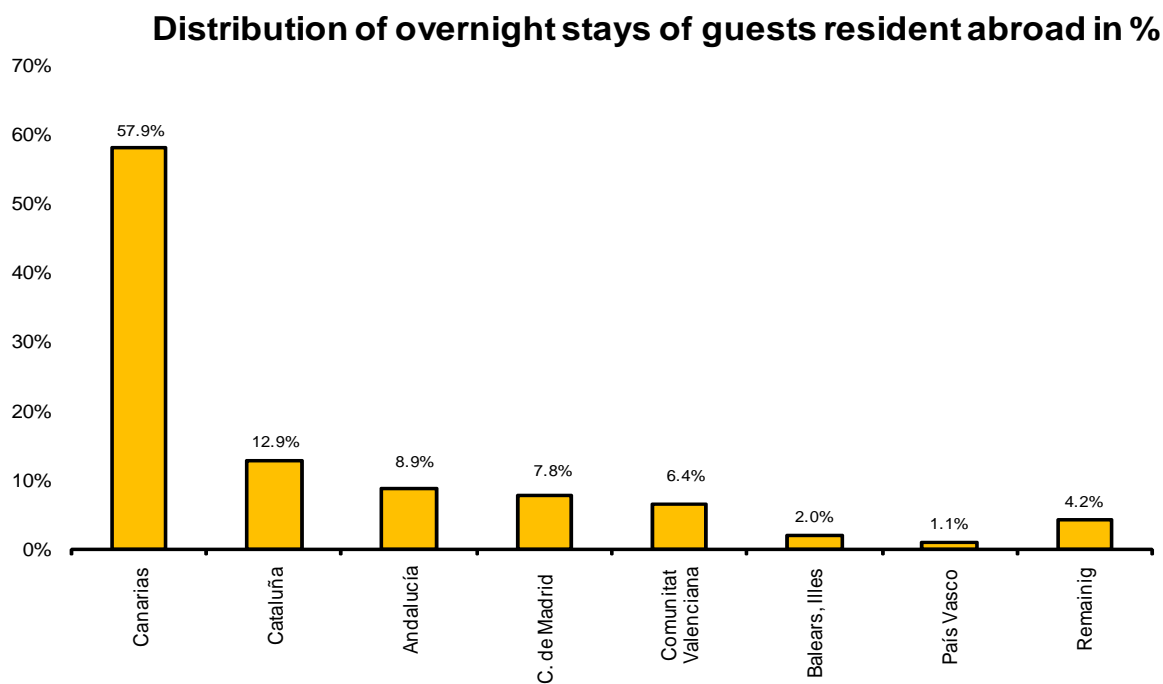
Main destinations

Andalucía, Comunidad de Madrid and Cataluña were the main destinations of guests resident in Spain, with interannual rates for overnight stays of -17.1%, -11.4% and -4.0%, respectively.

* It will be published a press release with a deep analysis of the annual results of the Hotel Occupancy Survey in January, 29th.

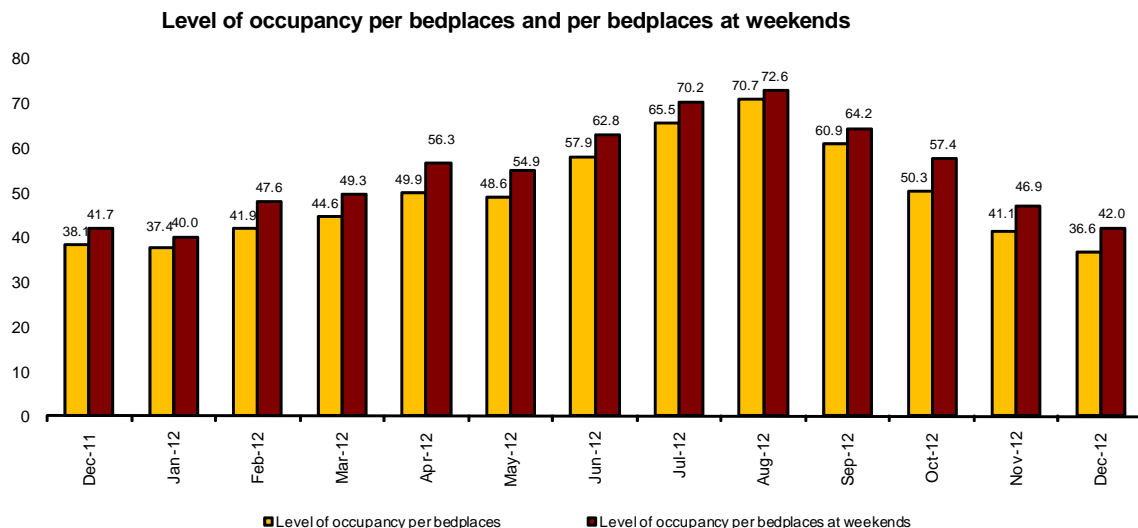


The main destination chosen by non-residents was Canarias. In this Autonomous Community, overnight stays by foreign nationals increased 6.3%, as compared to the same month of 2011. Cataluña followed it with an annual rate of –2.2%, and also Andalucía, with a decrease of 6.4%.



Hotel Occupancy

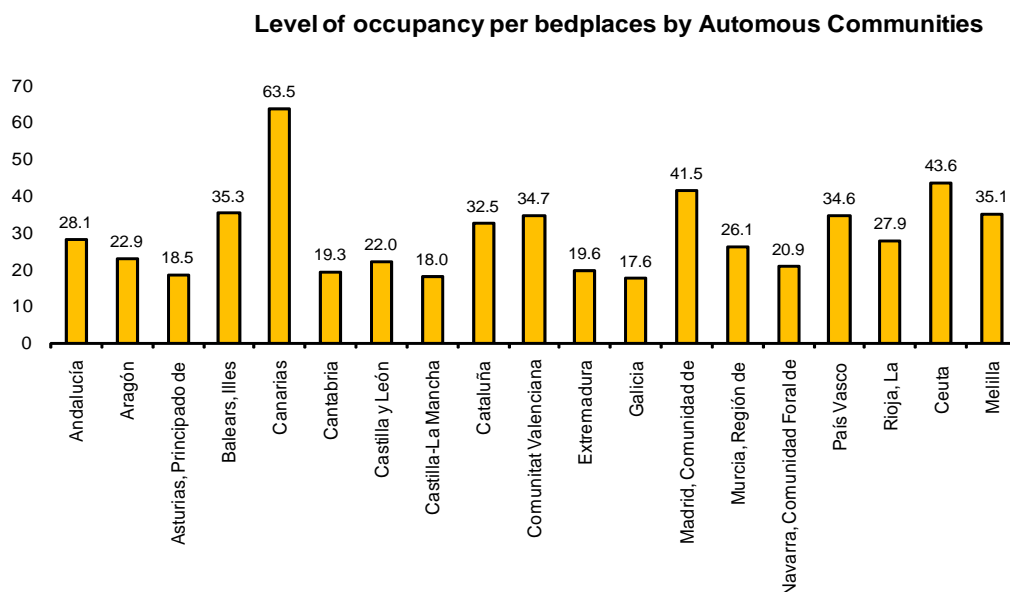
In terms of occupancy, 36.6% of the available bedplaces were filled in December, with an annual decrease of 4.0%. The weekend occupancy rate by bedplaces increased 0.5% and stood at 42.0%.



During the month of December, Canarias was the Autonomous Community with the highest occupancy rate by bedplaces (63.5%), followed by Comunidad de Madrid (41.5%) and Illes Balears (35.3%).

The South of Tenerife presented the highest occupancy rate by bedplaces (72.0%), and the highest weekend occupancy rate by bedplaces (72.6%). In the island of Tenerife more than 1.8 million of overnight stays were registered in December.

The tourist sites with the highest number of overnight stays were Madrid, Barcelona and San Bartolomé de Tirajana. Mogán reached both the highest occupancy rate by bedplaces (76.6%) and the highest weekend occupancy (79.3%).

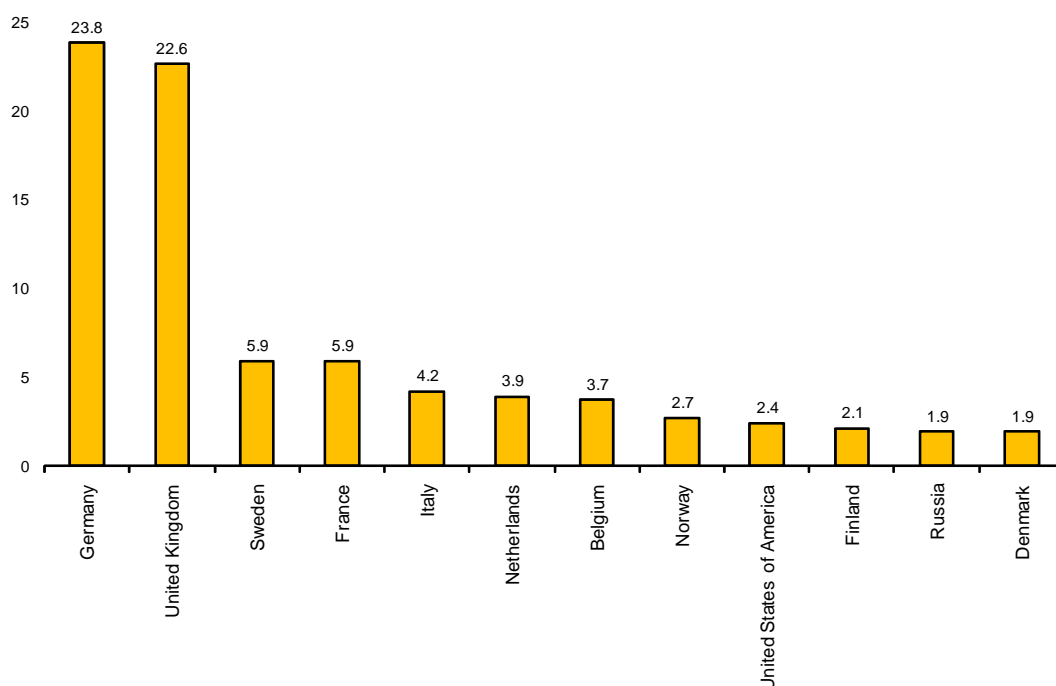


Overnight stays of guests resident abroad

Guests from Germany and the United Kingdom registered more than 3.2 million of overnight stays in December. The German market experienced a 4.3% annual decrease, whilst the British market increased 6.2%.

Overnight stays of guests from Sweden, France and Italy (the following countries of origin) registered annual rates of 25.0%, -5.4% and -20.4%, respectively.

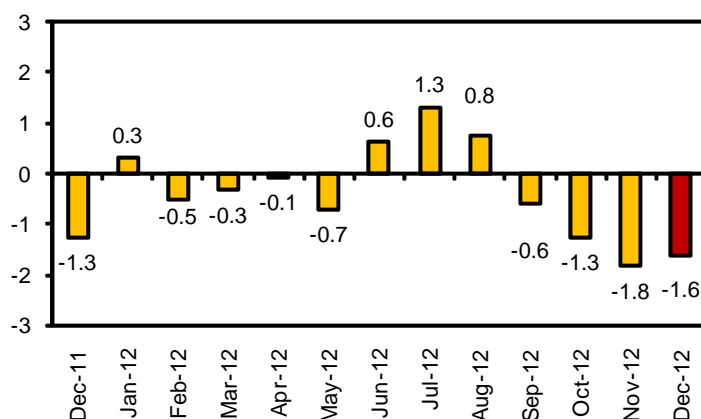
Overnight stays of guests resident abroad by country of origin in %



Hotel Price Index Performance

The **interannual rate of the Hotel Price Index (HPI)** was **-1.8%** in December, this rate being 0.4 points lower than that obtained in December 2011, and 0.2 points higher than that registered last month.

Hotel Prices Index. Interannual growth rate



Canarias, Comunidad de Madrid, Cataluña and Andalucía, that carried 75.9% of the total weight of the HPI in the month of December, showed uneven performance in their prices.

Canarias, which carried the greatest load in the weighting structure this month, presented an interannual rate of 1.6%, 0.1 points higher than that estimated in November. Hotel prices experienced a variation of -4.7% in Comunidad de Madrid, as compared to -3.9% registered the previous month. Cataluña showed a rate of -1.3%, as compared to the -3.2%, in the last month. Andalucía presented an annual variation of -3.4%, 0.4 points less than in November.

Hotel prices decreased in three-gold-star hotels (-4.5%), in one-silver-star hotels (-3.7%), in three and two-silver-star hotels (-3.1%), in one-gold star hotels (-2.9%), in two-gold-star (-1.8%) and in four-gold-star hotels (-0.8%).

Conversely, prices increased in five-gold-star hotels (0.6%).

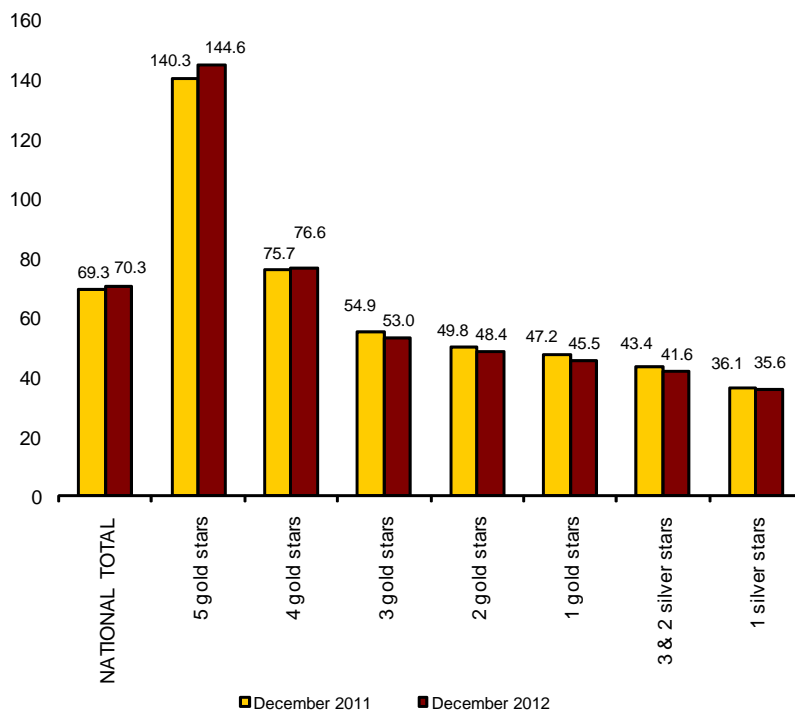
Indicators on the Profitability of the Hotel Sector

The average invoicing by hotels per occupied room (ADR) in December was 70.3 euros, 1.7 euros higher than the same month in 2011.

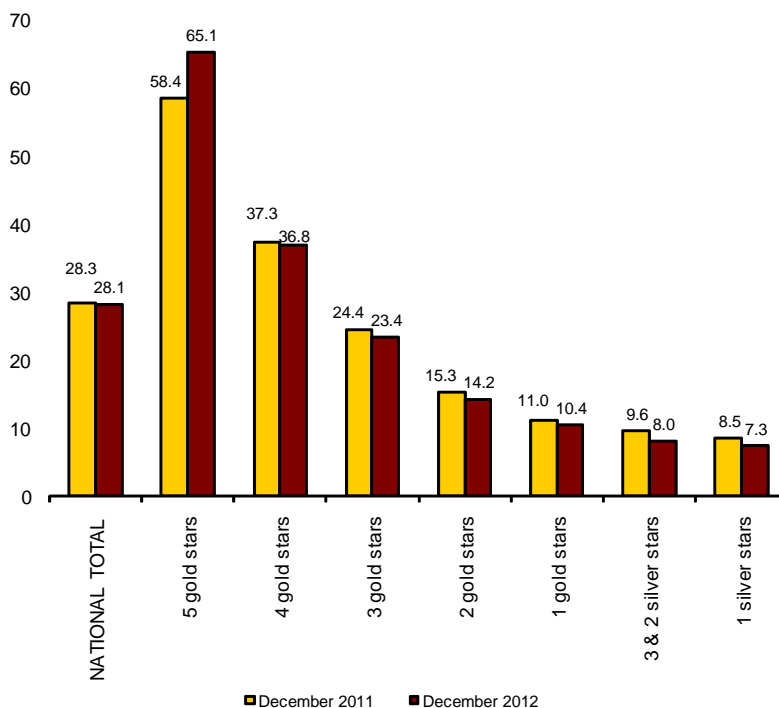
In turn, income per available room (RevPAR), that was conditioned by the occupancy registered in the hotel establishments, reached 28.1 euros, with a decrease of 0.7%..

By category, the average invoicing was 144.6 euros for five-star hotels, 76.6 euros for four-star hotels and 53.0 euros for three-star hotels. Income per available room for these same categories was 65.1, 36.8 and 23.4 euros, respectively.

Average daily rate in euros (ADR)



Revenue per available room in euros (RevPAR)



For further information see INEbase-www.ine.es/en/

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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

December 2012

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	4,332,715	2,641,151	1,691,564	12,377,271	5,293,103	7,084,168	2.86
HOTELS: Golden stars							
Five	283,560	118,625	164,935	913,406	239,952	673,453	3.22
Four	2,080,590	1,180,687	899,903	6,363,541	2,297,283	4,066,258	3.06
Three	1,128,332	726,058	402,274	3,308,816	1,531,712	1,777,104	2.93
Two	330,048	243,213	86,835	714,839	454,024	260,815	2.17
One	122,627	88,122	34,504	247,296	160,474	86,822	2.02
INNS: Silver stars							
Two and three	203,672	153,638	50,034	405,027	300,589	104,438	1.99
One	183,887	130,808	53,080	424,347	309,068	115,279	2.31
Interannual rate	-5.70	-8.71	-0.59	-5.12	-12.96	1.73	0.62
Cumulative interannual rate	-2.57	-6.08	1.50	-1.88	-8.42	2.27	0.70

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	13,009	1,083,684	36.59	41.97	40.23	138,238
HOTELS: Golden stars						
Five	231	73,877	39.51	46.41	45.25	20,429
Four	1,703	466,413	43.67	48.79	48.18	66,879
Three	1,972	261,544	40.53	46.78	44.51	29,593
Two	1,563	89,203	25.71	32.37	29.32	7,062
One	1,019	39,601	20.10	24.27	23.24	3,231
INNS: Silver stars						
Two and three	2,799	78,621	16.56	20.66	19.62	6,094
One	3,723	74,424	18.36	21.37	22.11	4,949
Interannual rate	-0.66	-1.21	-4.02	0.56	-2.24	-5.39

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

Sur de Tenerife	29,289	168,427	140,639	1,328,927	72.03	72.57	77.45	7.43	12,130
Sur de Gran Canaria	12,373	130,416	58,285	1,101,137	69.41	70.23	77.50	8.12	9,531
Isla de Tenerife	58,683	201,472	256,925	1,599,446	69.33	70.78	74.92	7.14	15,360
Isla de Gran Canaria	28,378	148,044	98,166	1,182,284	68.37	69.69	76.53	7.26	10,506
Isla de Lanzarote	14,814	65,213	63,607	553,862	58.05	58.58	66.59	7.72	4,923
Isla de La Gomera	1,513	5,511	2,636	27,362	57.30	41.55	45.31	4.27	360
Isla de Fuerteventura	6,087	79,976	22,126	702,542	52.94	53.37	62.36	8.42	6,440
Costa Blanca	113,410	61,350	389,605	332,628	42.70	49.27	48.52	4.13	5,931

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

Barcelona	116,657	273,087	214,494	680,928	39.35	47.01	44.80	2.30	11,992
Costa del Sol	75,713	78,488	183,720	298,694	32.40	33.07	34.87	3.13	5,888
Isla de Mallorca	19,089	29,556	69,371	139,570	36.15	40.48	43.20	4.30	2,473
Palma - Calvià	18,098	23,946	67,378	114,515	42.30	48.84	51.20	4.33	2,044
Costa Brava	55,182	38,614	103,644	76,370	29.79	35.07	30.93	1.92	1,946
Costa Daurada	49,506	13,816	79,513	31,507	24.84	35.11	26.56	1.75	1,257
Costa de la Luz de Cádiz	39,403	12,641	80,147	26,933	20.00	29.64	25.65	2.06	1,654
Pirineo Aragonés	36,185	2,311	93,384	4,991	28.95	39.41	24.40	2.56	1,039

Tourist sites with a greater level of occupancy per month

Mogán	1,813	39,506	7,769	312,970	76.57	79.28	83.65	7.76	1,950
Arona	6,595	45,232	35,908	385,669	75.58	76.36	80.34	8.13	2,966
Adeje	11,871	89,200	65,305	743,765	73.13	73.99	80.28	8.00	6,746
Puerto De La Cruz	17,250	22,139	88,337	231,034	67.69	71.70	73.03	8.11	2,460
San Bartolomé De Tirajana	10,525	90,728	50,732	787,444	67.00	67.19	75.44	8.28	7,590
Palmas De Gran Canaria (Las)	13,256	15,204	33,815	75,259	61.59	64.73	71.22	3.83	827
Tías	1,929	19,552	10,307	167,748	60.03	61.48	70.97	8.29	1,407
Yaiza	7,737	30,567	38,716	252,056	56.75	55.67	62.25	7.59	2,457
Benidorm	57,685	35,249	274,890	257,377	54.34	62.77	62.28	5.73	3,646
Pájara	2,685	51,683	10,773	476,118	53.39	52.26	62.24	8.96	4,461

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

Madrid	357,972	235,734	622,751	506,612	45.41	56.81	52.94	1.90	11,685
Barcelona	110,209	266,536	195,519	663,778	39.94	48.06	45.47	2.28	11,640
Sevilla	64,690	50,940	119,599	102,466	37.35	49.02	40.89	1.92	2,718
Granada	65,164	38,111	121,701	60,507	45.01	64.54	45.94	1.76	1,498
Valencia	52,813	32,512	91,393	74,506	30.59	40.29	35.04	1.94	1,902
Palma	17,227	20,038	65,288	85,839	42.89	47.25	49.27	4.06	1,712
Torremolinos	11,257	12,099	34,715	80,941	33.38	32.32	32.43	4.95	1,277
Teguise	2,623	12,523	8,616	106,105	50.52	53.77	63.49	7.57	866
Málaga	31,530	24,963	57,750	50,558	37.82	41.95	44.09	1.92	1,089
Córdoba	35,898	17,929	60,880	25,527	41.31	60.61	46.14	1.61	808

* 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	4,332,715	100.00	12,377,271	100.00
Residents in Spain	2,641,151	60.96	5,293,103	42.76
Residents abroad	1,691,564	39.04	7,084,168	57.24
Total Residents abroad	1,691,564	100.00	7,084,168	100.00
Total Residents in U.E. (without Spain)	1,165,161	68.88	5,702,256	80.49
- Germany	224,516	13.27	1,684,483	23.78
- Austria	11,656	0.69	62,785	0.89
- Belgium	45,472	2.69	258,663	3.65
- Denmark	22,187	1.31	131,006	1.85
- Finland	25,290	1.50	150,079	2.12
- France	187,109	11.06	419,194	5.92
- Greece	4,726	0.28	13,388	0.19
- Ireland	19,988	1.18	88,932	1.26
- Italy	112,821	6.67	295,973	4.18
- Luxembourg	3,670	0.22	19,606	0.28
- Netherlands	57,331	3.39	278,735	3.93
- Poland	13,947	0.82	65,786	0.93
- Portugal	56,065	3.31	107,725	1.52
- United Kingdom	279,245	16.51	1,598,166	22.56
- Czech Republic	4,329	0.26	17,454	0.25
- Sweden	67,018	3.96	419,513	5.92
- Rest of UE*	29,792	1.76	90,769	1.28
Norway	30,667	1.81	194,173	2.74
Russia	36,765	2.17	132,475	1.87
Switzerland	27,163	1.61	99,854	1.41
Rest of Europe	43,639	2.58	129,323	1.83
Japan	45,846	2.71	74,438	1.05
United States of America	76,545	4.53	168,538	2.38
Rest of America	105,433	6.23	238,712	3.37
African's countries	32,136	1.90	65,860	0.93
Rest of the world	128,208	7.58	278,539	3.93

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

Hotel Price Index (HPI). 2008 Base

December 2012

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

	Index	Interannual variation rate
TOTAL	91.7	-1.6
Andalucía	91.2	-3.4
Aragón	77.1	-4.8
Asturias, Principado de	83.3	-8.4
Balears, Illes	98.9	4.2
Canarias	98.8	1.6
Cantabria	88.8	-4.7
Castilla y León	88.1	-4.7
Castilla - La Mancha	87.8	-2.6
Cataluña	89.5	-1.3
Comunitat Valenciana	91.4	-3.9
Extremadura	86.4	-4.7
Galicia	89.7	-5.8
Madrid, Comunidad de	82.9	-4.7
Murcia, Región de	79.8	-8.0
Navarra, Comunidad Foral de	90.2	-7.5
País Vasco	92.7	1.1
Rioja, La	85.4	-6.6
Ceuta	84.9	-13.5
Melilla	99.1	-0.3

National General Index and breakdown by categories

	Index	Interannual variation rate
TOTAL	91.7	-1.6
HOTELS: Gold stars		
Five	91.4	0.6
Fourth	92.5	-0.8
Three	88.6	-4.5
Two	91.6	-1.8
One	91.5	-2.9
HOSTALS: Silver stars		
Three and two	92.1	-3.1
One	98.3	-3.7

Indicators on the Profitability of the Hotel Sector

December 2012

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	70.3	1.7	28.1	-0.7
Andalucía	60.0	0.5	18.1	-7.7
Aragón	53.7	-5.1	12.8	2.7
Asturias, Principado de	56.0	1.3	11.7	-3.8
Balears, Illes	64.9	5.9	27.2	33.6
Canarias	80.6	5.3	57.0	4.5
Cantabria	58.0	-9.3	12.8	-12.3
Castilla y León	52.7	-5.8	12.6	-10.7
Castilla - La Mancha	55.9	-3.6	11.9	-7.9
Cataluña	81.2	0.9	29.2	-1.6
Comunitat Valenciana	53.2	2.6	20.7	1.3
Extremadura	52.3	-8.0	12.7	-8.9
Galicia	49.7	-5.3	10.1	-6.8
Madrid, Comunidad de	74.7	-3.7	35.9	-12.0
Murcia, Región de	50.7	-13.9	14.6	-11.5
Navarra, Comunidad Foral de	61.3	-1.8	14.3	-11.8
País Vasco	69.3	4.3	27.6	-0.9
Rioja, La	63.9	0.9	19.6	-9.4
Ceuta	64.1	-9.8	24.8	-32.2
Melilla	63.2	1.1	29.2	-2.2

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

	ADR (in euros)	Variation Rate interannual	RevPar (in euros)	Variation Rate interannual
TOTAL	70.3	1.7	28.1	-0.7
HOTELS: Gold stars				
Five	144.6	3.8	65.1	11.9
Four	76.6	1.3	36.8	-1.3
Three	53.0	-3.0	23.4	-4.5
Two	48.4	-3.0	14.2	-7.4
One	45.5	-3.7	10.4	-5.5
GUESTHOUSES: Silver stars				
Three and two	41.6	-3.8	8.0	-16.4
One	35.6	-1.4	7.3	-14.1

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