

28 February 2007

Hotel Tourism Short Term Trends (HOS/HPI/HII)
January 2007. Provisional data

Overnight stays in hotel establishments increased 3.5% in May with respect to the same month in 2006

Hotel prices increased 2% in the interannual rate

During the month of January 12.5 million overnight stays were registered in hotel establishments, which supposes a 3.5% increase with respect to the same month in 2006. The increase in overnight stays occurs both in residents, whose interannual rate is 1.8%, and in non-residents (with an interannual variation of 4.9%).

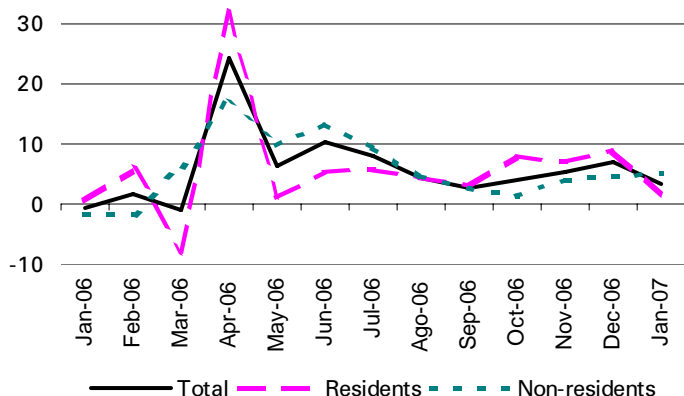
Since the interannual increase **in number of travellers (5.1%)** exceeds that of overnight stays, the **average stay is reduced in 1.6%** with respect to January 2006, at three overnight stays per traveller.

On the other hand, the **Hotel Price Index (HPI) registered a 2%** increase in the month of January, with a 1.1 % growth compared to the same month in 2006.

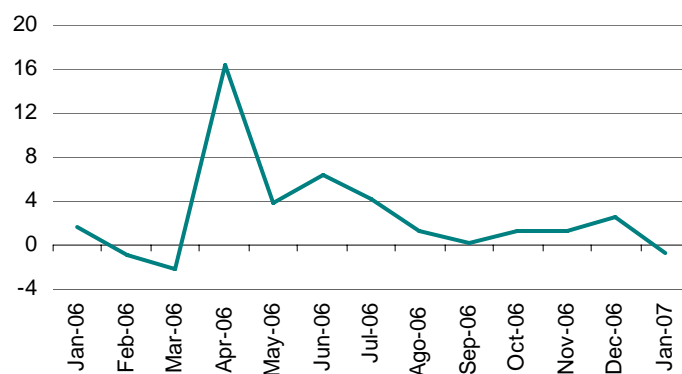
The Hotel Income Index (HII), which compared to the HPI also considers the variation in the tariff structure, reflects an interannual growth of income per occupied room of 2.9%.

During the month of January 40.6% of bed places offered were covered, which is a 0.8% decrease with respect to the same month from the previous year. **Level of occupancy by bed places at weekends is 42%**, with an interannual decrease of 3.5%.

Interannual rates of overnight stays in %



Interannual rates of occupancy rate by bedplaces



The levels of occupancy expected for March and April increase

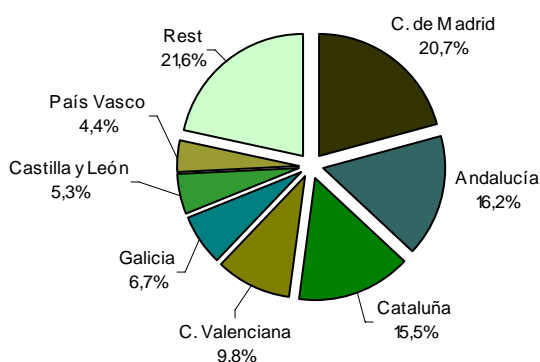
The levels of expected occupancy by room for the months of March and April register year-on-year rates of 7.8% and 8.7% respectively with respect to expected levels in January of the previous year for the same months.

New increase of overnight stays of German citizens

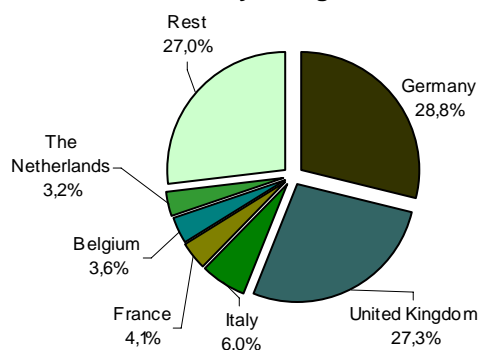
Travellers from Germany and United Kingdom account for 3.8 million overnight stays in January, 56.1% of the total for non-residents. The German market experiences a 5.7% interannual growth of overnight stays, whereas the British market registers a 1.2% decrease.

Overnight stays of travellers from Italy, France, and Belgium (the following markets) presented interannual rates of 0.7%, 8.4% and -0.2% respectively.

Overnight stays of Spanish guests by Autonomous Community of origin in %



Overnight stays of foreign guests by country of origin in %

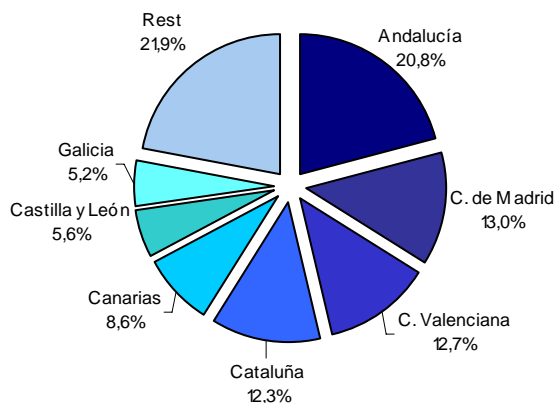


Canarias is the favourite destination of foreign travellers

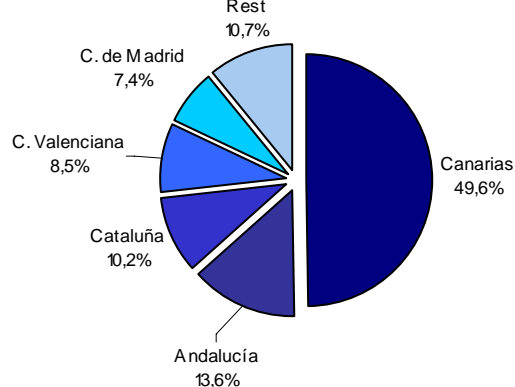
Most non-residents choose to come to Canarias. In this community, overnight stays of foreigners, representing 49.6% of the national total, increased 4.1% with respect to January 2006. Andalucía follows with an interannual rate of 6.7% and Cataluña, with a rate of 3.1%.

Andalucía, Comunidad de Madrid and Comunidad Valenciana are the main destinations of Spaniards, with year-on-year rates of overnight stays of 3.1%, 2.8% and 5.6%, respectively.

Distribution of overnight stays of Spanish travellers in %



Distribution of overnight stays of foreign travellers in %



Canarias reaches the highest degree of occupancy in the month of January

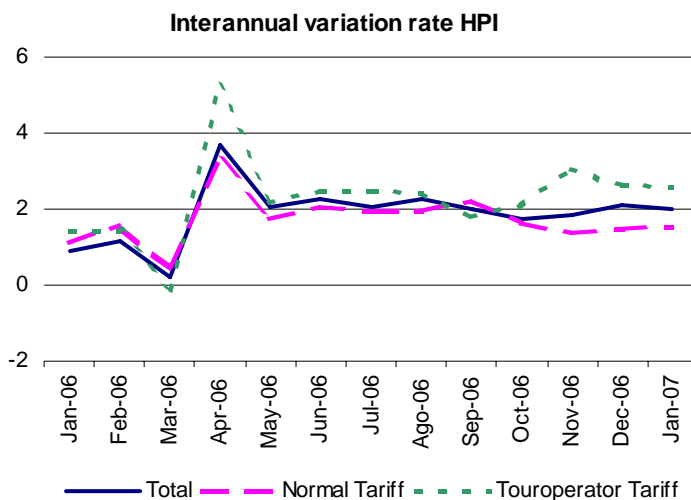
Canarias is the Autonomous Community with the highest level of occupation by bed places in the month of January (64.3%). It is followed by Comunidad de Madrid (45.2%) and Illes Balears (44%).

The **holiday areas** with the greatest levels of occupancy and overnight stays appear, as in previous months, in islands and coasts, and some area of the Pyrenees. The island of Gran Canaria thus obtains the greatest level of occupancy by bed places (70.4%), and the greatest level of occupancy by bed places at weekends (69.6%). Isla de Tenerife registers almost 1.8 million overnight stays in January.

Tourist sites with the greatest number of overnight stays are Madrid, San Bartolomé de Tirajana y Adeje. Arona reaches both the greatest level of occupancy by bed places (82.4%), and the greatest weekend occupancy (78.9%).

Hotel prices record an interannual rate of 2% in January

The interannual increase of the HPI is 2% in January, 0.1 point lower than that of the previous month, and 1.1 points higher than the interannual rate recorded one year ago. The difference between interannual rates of "Tour Operator and Travel Agency" (2.6%) and "Normal" (1.5%) prices decreases is maintained with respect to the previous month, "Tour Operator and Travel Agency" prices and "Group" prices being the only ones above the average growth in prices.



Hotel prices increase in all autonomous communities

The four communities (Canarias, Andalucía, Cataluña and Comunidad de Madrid) that involve 72.5% of the total weight of the Hotel Price Index in the month of January record positive interannual rates. Canarias, which has the greatest weight in the weightings structure this month (27.4%), records an interannual rate of 2%, 0.8% lower than that recorded in December. Andalucía, with an 0.3% increase, records a one point decrease in rate with respect to that reached last month, whereas Cataluña, with an interannual variation of 1.8%, maintains it without variation. Comunidad de Madrid records a rate of 3.5%, one point higher than that recorded last month.

Hotel prices increase compared to the previous year in all categories, except for that of five gold stars

Prices for five gold star hotels are the only ones that decrease in the month of January, 1% with respect to the same month from the previous year.

The most moderate growth rates are in three and four gold star hotels (with 1.6% and 2.2% rates, respectively).

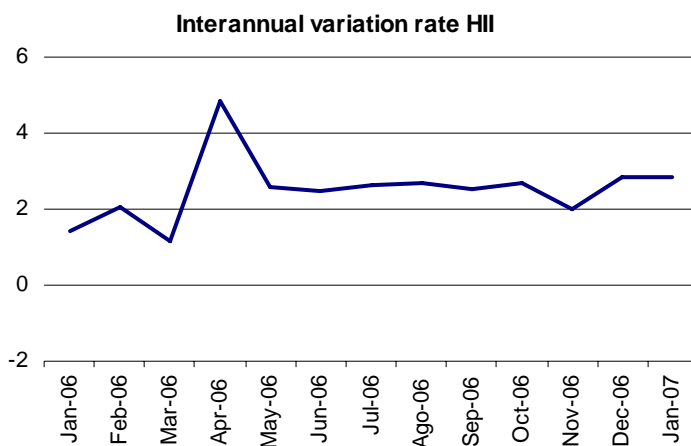
Hotels with one Silver Star are those increasing the most (8.8% in the interannual rate), followed by hotels with one gold star (whose prices increase 5.7%).

The interannual rate of the HII increases 2.9% in January

HII experiences an interannual growth of 2.9% in January, 0.1 points higher than the rate of the previous month and 1.5 points higher than that recorded one year ago.

The five communities (Canarias, Andalucía, Cataluña, Comunidad de Madrid and Comunidad Valenciana) involving 77.1% of the total weight of the income per occupied room index in the month of January record positive interannual rates (1.6%, 1.2%, 3.8%, 4.5% and 5.6%, respectively).

Income **per occupied room** increase in all categories. The most moderate growth appears in establishments with five and three gold stars, with rates amounting to 0.2% and 2.5%, respectively. The greatest interannual growth appeared in the category listing hotels with one Silver Star 6.3%.



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