

23 March 2007

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

Overnight stays in hotel establishments increased 3.2% in February, as compared with the same month in 2006.

Hotel prices increased 2% in the interannual rate

During the month of February 13.6 million overnight stays were registered in hotel establishments, representing a 3.2% increase with regards to the same month in the same month of 2006. The increase in overnight stays occurs both in residents, whose interannual rate is 0.9%, and in non-residents (with an interannual variation of 5.4%).

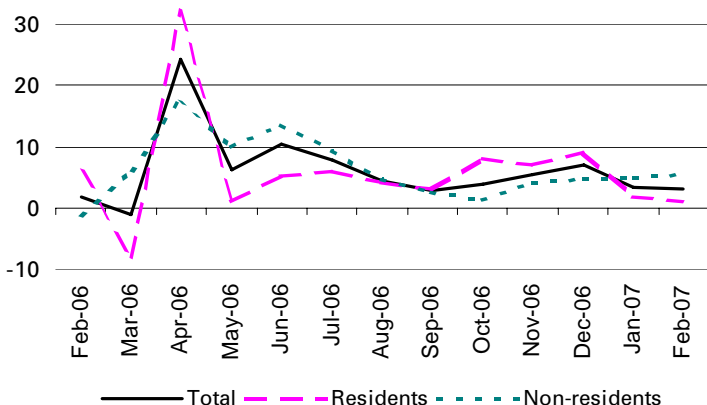
Since the interannual increase in **number of guests (3.8%)** exceeds that of overnight stays, the **average stay is reduced in 0.6%** with respect to January 2006, at three overnight stays per guest.

On the other hand, the **Hotel Price Index (HPI) registered a 2% increase** in the month of January, with a 0.6 base points growth compared to the same month in 2006.

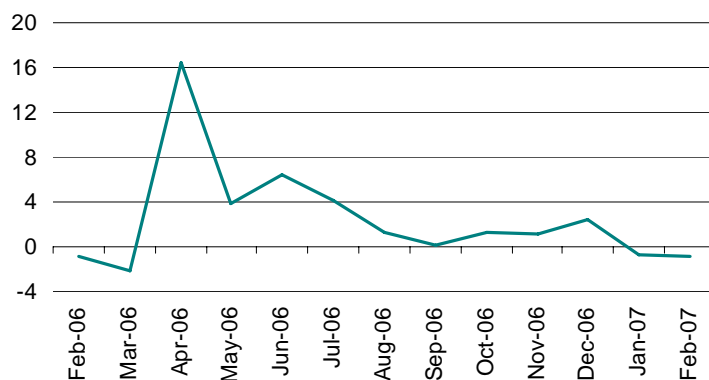
The Hotel Income Index (HII), which compared to the HPI also considers the variation in the tariff structure, reflects an interannual growth of income per occupied room of 2.8%.

During the month of February 46.1% of bedplaces offered were covered, representing a 0.9% decrease with respect to the same month from the previous year. **Level of occupancy by bedplaces at weekends is 51.5%**, with an interannual decrease of 1%.

Interannual rates of overnight stays in %



Interannual rates of occupancy rate by bedplaces



The levels of occupancy expected for March and April increase

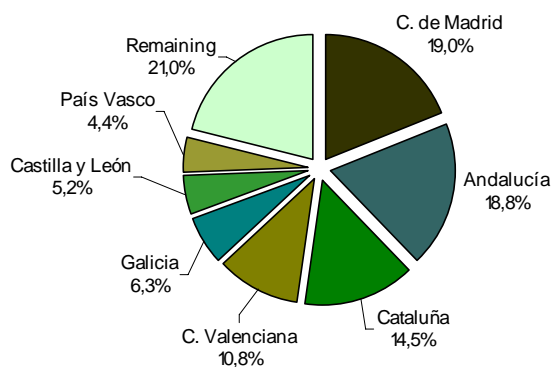
The levels of occupancy expected by room for the months of March and April register year-on-year rates of 5.5% and 4.9% respectively with respect to expected levels in January of the previous year for the same months.

New increase of overnight stays of German citizens

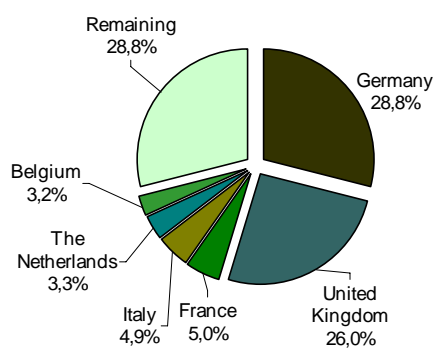
Guests from Germany and the United Kingdom account for 3.9 million overnight stays in February, 54.8% of the total for non-residents. The German market experiences a 7% interannual growth of overnight stays, whereas the British market registers a 1.5% decrease 1.5%.

Overnight stays of guests from Italy, France, and Netherlands (the following markets) presented interannual rates of -6.3%, 3.4% and -2% respectively.

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



Overnight stays of foreign guests by country of origin in %

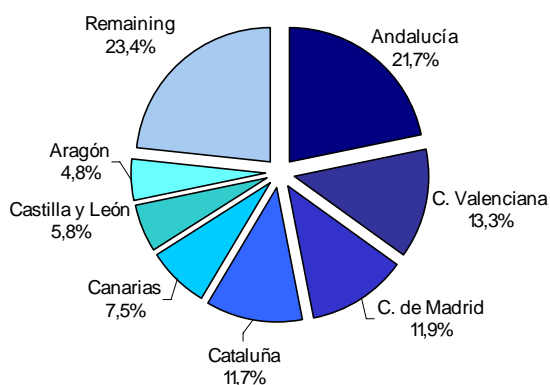


Canarias is the favourite destination of foreign guests

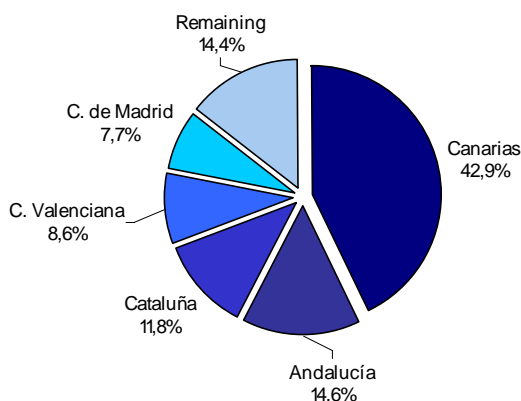
Most non-residents choose to come to Canarias. In this community, overnight stays of foreigners, representing 42.9% of the national total, increased 4.1% with respect to February 2006. It is followed by Andalucía, with an interannual rate of 4.3% and Cataluña, with a rate of 1.2%.

Andalucía, Comunidad Valenciana and Comunidad de Madrid are the main destinations for Spaniards, with year-on-year rates of overnight stays of 4.7%, 5% and 0.6%, 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 February

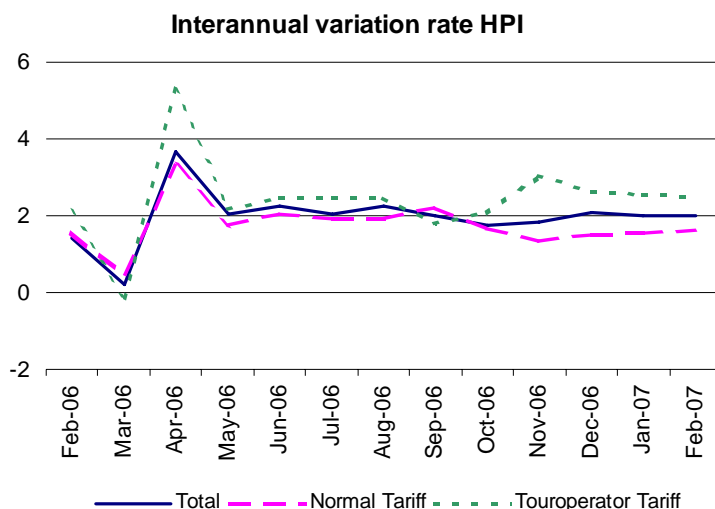
Canarias is the Autonomous Community with the highest level of occupation by bedplaces in the month of February (64.7%). It is followed by Comunidad de Madrid (53.4%) and Illes Balears (51.5%).

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. Isla de La Gomera registered the greatest occupancy ratio by bedplaces (71.3%). Isla de Gran Canaria rendered the greatest occupancy levels by bedplaces at weekends (70.2%), registering almost 1.7 million overnight stays during February.

The **tourist sites** with the greatest number of overnight stays are Madrid, Barcelona and San Bartolomé de Tirajana. Arona reaches the greatest level of occupancy by bedplaces (77.7%) and Benasque registers the greatest weekend occupancy (88.4%).

Hotel prices record an interannual rate of 2% in February

The interannual increase of the HPI is 2% in February, an identical rate as that of the previous month, and 0.6 points higher than the rate recorded one year ago. The difference between interannual rates of "Tour Operator and Travel Agency" (2.5%) and "Normal" (1.6%) prices decreases 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 decrease in Región de Murcia

Hotel prices increase in all autonomous communities except in the Region of Murcia (-0.9%). The four communities (Canarias, Andalucía, Cataluña and Comunidad de Madrid) concentrating 70.1% of the total weight of the income per occupied room index in the month of February record positive interannual rates. Canarias, which has the greatest weight in the weightings structure this month (23%), records an interannual rate of 1.3%, 0.7% lower than that recorded in December. Andalucía, Comunidad de Madrid and Cataluña, registered rates of 0.5%, 2.4% and 3.9% exceeding by 0.2, 0.4 and 0.6 points, respectively, those registered in January 2007.

Hotel prices increase in all categories

Hotel prices increase compared to the previous year in all categories. The mildest growth rates were registered in establishments with five and three gold stars, (with 0.4% and 1.8% rates, respectively).

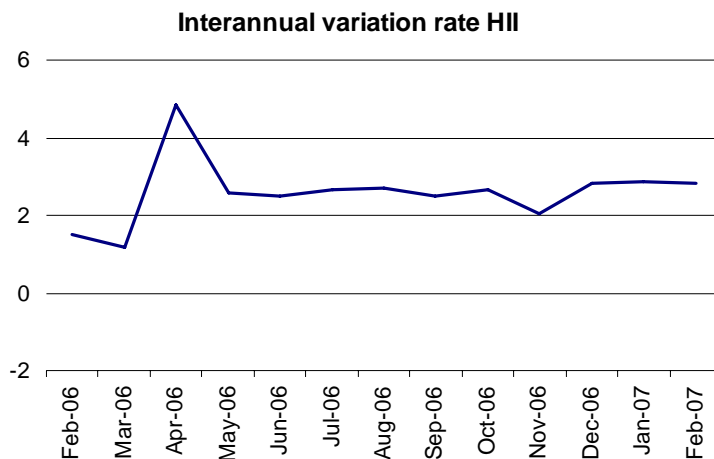
Hotels with one silver star are those increasing the most (6.3% in the interannual rate), followed by hotels with one gold star (whose prices increase 5.5%).

The interannual rate of the HII increases 2.8% in February

HII experiences an interannual growth of 2.8% in February, 0.1 points higher than the rate of the previous month and 1.3 points higher than that recorded one year ago.

The five communities (Canarias, Andalucía, Cataluña, Comunidad de Madrid and Comunidad Valenciana) representing 74% of the total weight of the income per occupied room index in the month of February record positive interannual rates (0.9%, 1.4%, 4%, 4.4% and 3.8%, respectively).

Income **per occupied room** increased in all categories. The most moderate growth rates were recorded in establishments with five and four gold stars, with 1.5% and 2.1% rates, respectively. The greatest interannual growth appeared in the category listing hotels with one silver star 5.6%.



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