

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

Overnight stays in hotel establishments increase 1.1% in July with respect to July 2006.

The interannual rate of hotel prices increases 3.3%.

During the month of July, 34.5 million overnight stays were registered in hotel establishments, which implies an increase of 1.1% with respect to the month of July 2006. The increase in overnight stays was observed for both residents (whose interannual rate was 1.3%), and non-residents (1%).

The average stay decreased 0.6% as compared with July 2006, standing at 3.7 overnight stays per guest.

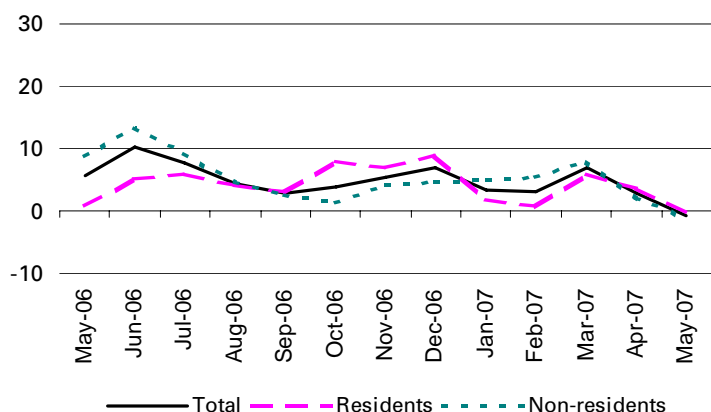
Over the first seven months of the year, 152 million overnight stays were registered, that is, 2.3% more than the same period in 2006, with increases of 2.7% for residents and 2% for non-residents. The **average stay** stood at 3.2 nights per guest, for a total of 1.1% less than the same period in 2006.

On the other hand, the **Hotel Price Index (HPI) registered an increase of 3.3%** in the month of July, with a 0.5 growth as compared with the same month in 2006.

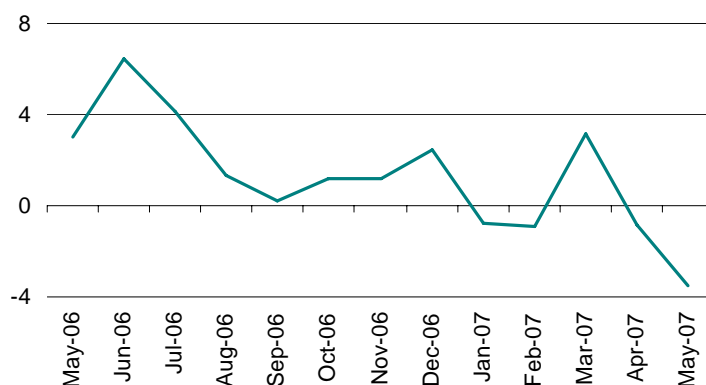
The Hotel Income Index (HII), which compared to the HPI also considers the variation in the tariff structure, reflected a 3.9% interannual growth in income per occupied room.

During the month of July, 68.1% of the available bed places were filled, which implies a decrease of 0.1% with respect to July 2006. **The weekend occupancy rate by bed places was 72.4%**, with an interannual increase of 0.3%.

Interannual rates of overnight stays in %



Interannual rates of occupancy rate by bedplaces



The occupancy rates expected for September and October increase.

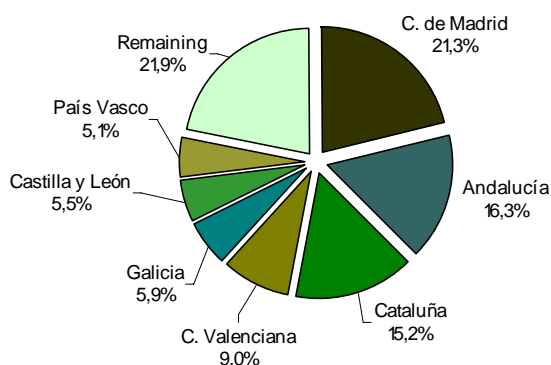
The occupancy rates by room expected for the months of September and October registered interannual rates of 0.6% and 3.1%, respectively, with respect to the rates expected in July of last year for the same months.

Overnight stays of British citizens increase, while those of German citizens decrease.

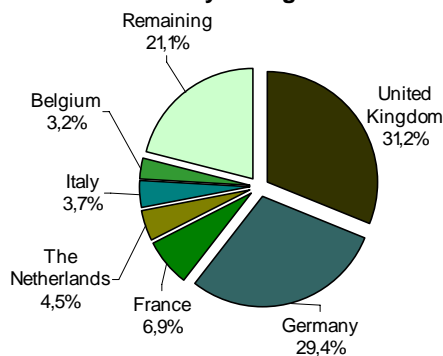
Guests from the United Kingdom and Germany registered almost 11.6 million overnight stays in July, accounting for 56.4% of the total for non-residents. The British market experienced an interannual increase of 1.4% in its overnight stays, while the German market experienced a decrease of 0.2%.

The overnight stays of Italian, French and Dutch guests (the following markets) presented interannual rates of -0.4%, -3.9% and -2.6%.

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



Overnight stays of foreign guests by country of origin in %

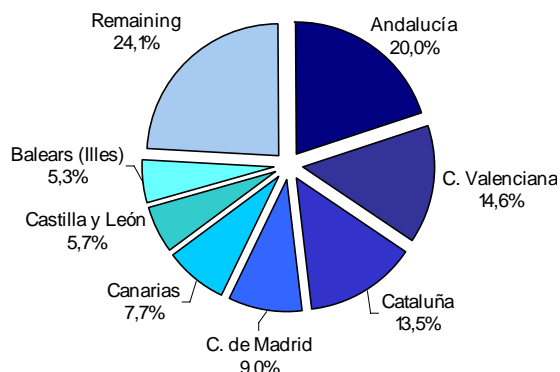


Illes Balears is the preferred destination of foreign guests.

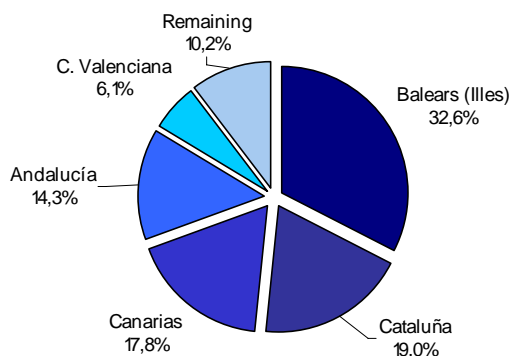
Most non-residents chose to come to Illes Balears. Within this community, overnight stays by guests, which represented 40.4% of the national total, increased 1.1% with respect to July 2006. It was followed by Cataluña, with an interannual rate of -2.4%, and by Canarias, with a rate of 1.3%.

Andalucía, Comunitat Valenciana and Cataluña were the main destinations for Spaniards, with interannual rates for overnight stays of 2.6%, 2.5% and -4.1%, respectively.

Distribution of overnight stays of Spanish travellers in %



Distribution of overnight stays of foreign travellers in %



Illes Balears reaches the highest occupancy rate in the month of July.

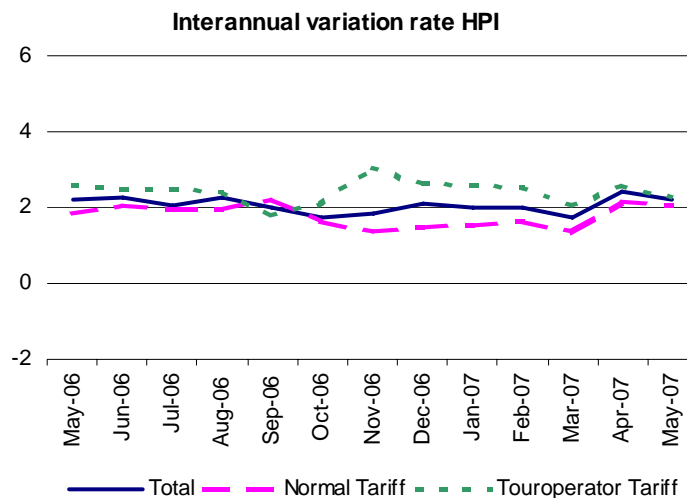
Illes Balears was the Autonomous Community with the highest occupancy rate by bed places for the month of July (89.4%). It was followed by Canarias (75.9%) and Comunitat Valenciana (71.5%).

The **tourist areas** with the highest occupancy and overnight stay rates were located on the islands and the coasts. The Island of Mallorca accounted for the highest occupancy rate by bed spaces (90.9%), and the highest weekend occupancy rate by bed spaces (89.7%). The Island of Mallorca is also the area where the greatest number of overnight stays were registered in July with over seven million bed places occupied.

The **tourist sites** with the highest number of overnight stays were Calvià, Benidorm and Palma de Mallorca. Calvià, in turn, had the highest occupancy rate in bed places (99%) and Alcudia had the highest weekend occupancy rate (95.2%).

Hotel prices increase in July.

The interannual increase of the HPI stood at 3.3% in July, which was 0.5 points above the rate from the prior month and the rate registered one year ago. The difference between the interannual rates of "Tour Operator and Travel Agency Tariff" (4.1%) and Normal Tariff (2.5%) increased with respect to the previous month.



Hotel prices increase in all Autonomous Communities.

The Communities with the greatest Hotel Price Index weightings in July were Illes Balears, Cataluña, Andalucía and Canarias, and they represent 70.4% of the total weight of the indicator. Illes Balears, which carried the largest load in the weight structure this month (21.1%), showed an interannual rate of 3.9%, that is, 0.4 points higher than the rate registered one month prior, in June.

Cataluña yielded a rate of 5%, 1.9 points higher than the rate registered in June 2007. Andalucía, however, experienced a price increase of 3%, 1.7 points higher than the previous month. Canarias reached a rate of 0.1%, 1 points lower than the rate registered in the previous month.

Hotel prices increase in all categories.

The prices of five- and four-gold-star hotels increased in July, that is, 2.5% as compared with the same month last year.

Three-gold-star hotels had interannual rates of 3.7%.

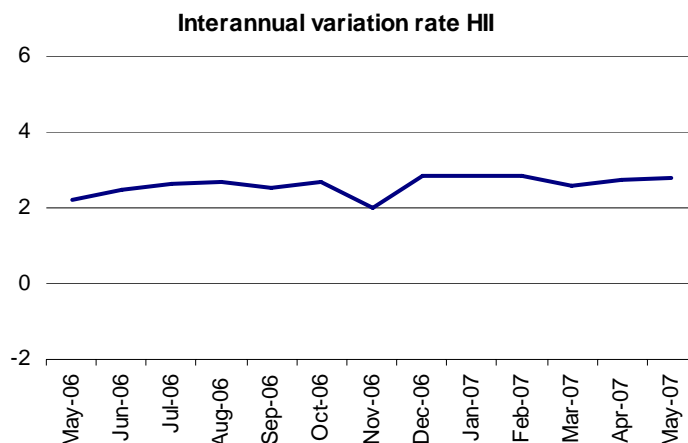
Hotels with one gold star increased the most (an interannual rate of 6.8%), followed by hotels with one gold star (5.1%).

The HII experiences an increase of 3.9% in the interannual rate in July.

The HII showed an interannual increase of 3.9% in July, 0.3 points higher than the rate registered in June and 0.4 points higher than the rate registered last year.

The four Communities (Illes Balears, Cataluña, Andalucía, and Canarias), which represent 70.7% of the total weight of the income index per occupied room in the month of July, registered positive interannual rates (5.7%, 5%, 2.5% and 0.6%, respectively).

Income **per occupied room** increased in all categories. The most moderate growth was found in four- and five-gold-star establishments, with rates of 2.2% and 3.6%, respectively. The highest interannual increase was found in the one- gold -star category (5.8%).



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