

24 August 2020

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
July 2020. Provisional data

Overnight stays in hotel establishments decrease 73.4% in July as compared with the same month of 2019

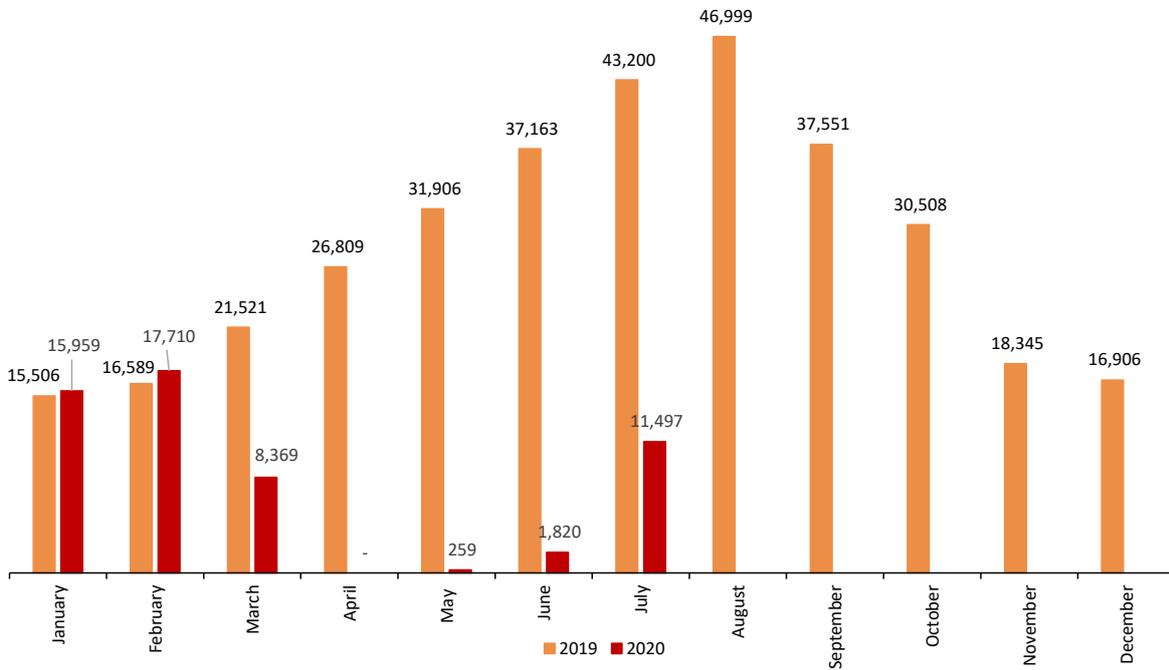
COVID-19's Effects on the Hotel Tourism Short-Term Trends (HOS/HPI/IPHS) in July

- In accordance with Royal Decree 555/2020¹, the state of alarm came to an end on June 21st, allowing population mobility throughout the national territory. In the month of July, the number of open establishments increased compared to June, rising from 5,896 to 12,068 (29.5% less than in July 2019). The total number of bed-places offered was 1,025,713, or 52.7% of the total.
- During the month of July, 4.3 million travellers stayed in a hotel establishment, with a total of 11.5 overnight stays. These figures represent 35.7% and 26.6%, respectively, of the estimated totals a year ago. Four-star hotels were the most visited, followed by three-star.
- Despite the progressive opening of external borders, in July, residents of Spain provided the most support for hotel activity (3.2 million travellers compared to 1.1 million non-residents). This is also reflected in the volume of overnight stays, which reached 7.4 million for residents, compared to 4.1 million for non-residents.
- The average traveller hotel stay decreased by 25.5% as compared with a year ago, standing at 2.7 overnight stays per traveller.
- Hotel prices were down 8.2% compared to July 2019.
- Andalucía is the autonomous community where the most establishments were open in July, and where the most travellers stayed hotels: nearly 900 thousand (2.5 million overnight stays). It was followed by Cataluña and Comunidad Valenciana.
- In the first seven months of 2020, there were 55.6 million overnight stays in Spanish hotels, 71.1% less than the same period for 2019.
- The data collected during the month of July made it possible to disseminate the same volume of information as prior to March 2020 and the COVID-19 pandemic. This data was of sufficient quality to be utilized by the interested parties. Territorial data dissemination was thus recovered at the point and tourist area level.

¹ Royal Decree 555/2020, of June 5th, extends the high alert period declared by Royal Decree 463/2020, of March 14, which declared the high alert period in order to manage the health crisis situation caused by COVID-19.

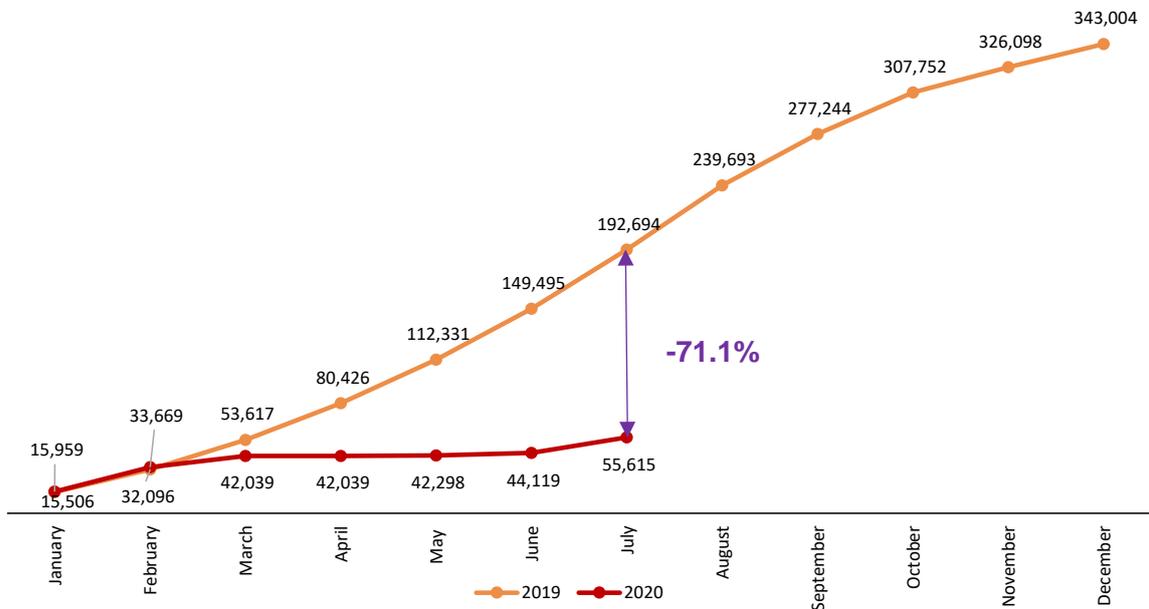
Overnight stays. Comparison 2019-2020

Thousands



Cumulative overnights. Comparison 2019-2020

Thousands



Open establishments

In July, a total of 12,068 hotels were open in Spain, 29.5% less than in the same month of 2019. This represents 62.5% of the total directory of establishments in that month.

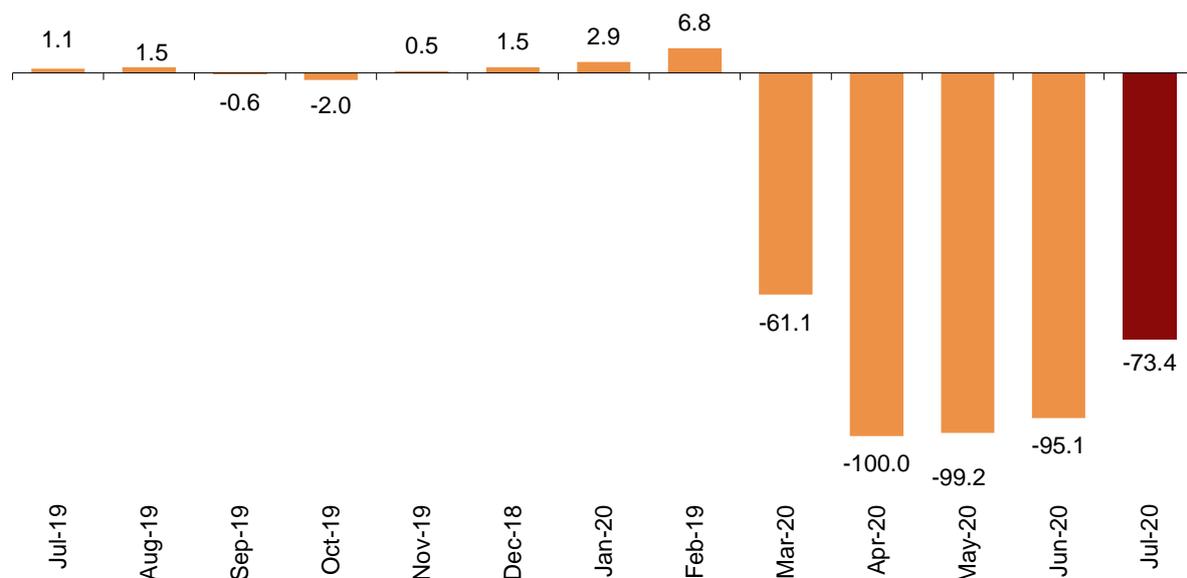
Categoría	Número establecimientos abiertos estimados según la encuesta	Porcentaje sobre el total de establecimientos de directorio	Número de habitaciones estimadas según la encuesta	Porcentaje sobre el total de habitaciones de directorio	Número de plazas estimadas según la encuesta	Porcentaje sobre el total de plazas de directorio
TOTAL	12.068	62,5	489.509	52,7	1.025.713	52,7
HOTELES: Estrellas oro						
Cinco	172	47,6	22.043	41,0	47.894	41,6
Cuatro	1.613	56,0	208.246	51,7	454.942	51,9
Tres	1.866	59,4	116.138	47,0	248.021	47,2
Dos	1.641	69,2	42.962	58,5	84.778	58,7
Una	1.125	73,9	23.828	71,2	46.748	71,6
HOSTALES: Estrellas plata						
Tres y dos	2.535	66,5	38.065	66,0	72.401	65,9
Una	3.116	59,8	38.228	63,3	70.929	64,1
Tasa anual	-29,5		-44,6		-44,8	

Overnight stays

Overnight stays in hotel establishments reached 11.4 million in July, representing a decrease of 73.4% compared to the 43.1 million for the same month of 2019.

Annual variation rate for overnight stays

Percentage



During the first seven months of 2020, overnight stays decreased by 71.1% as compared to the same period of the previous year.

By country of residence, overnight stays by residents of Spain decreased by 50.0% in the annual rate, exceeding 7.4 million. In turn, overnight stays by non-residents fell by 85.7%, reaching 4.0 million.

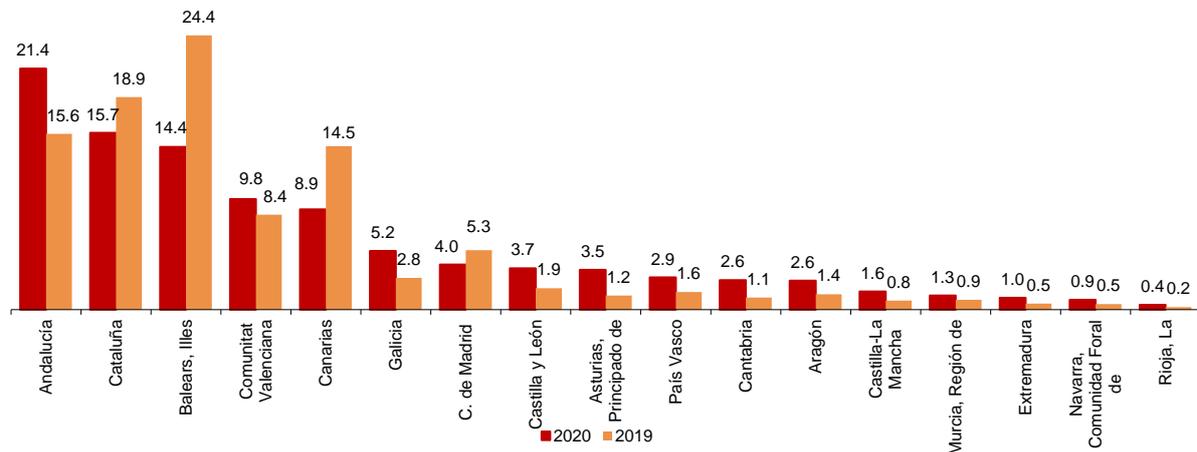
Furthermore, the average stay decreased 25.5% compared to July 2019, standing at 2.7 overnight stays per traveller.

Destinations

Andalucía, Cataluña, and Comunitat Valenciana were the main destinations of residents in Spain in July, with annual variation rates in the number of overnight stays of -63.5%, -77.9% and -69.0%, respectively.

Distribution of overnight stays Comparison May 2019-2020

Percentage



Andalucía, Cataluña and Comunitat Valenciana were the main destinations of residents in Spain in July, with variation rates in the number of overnight stays of -46.0%, -48.0% and -60.2% respectively.

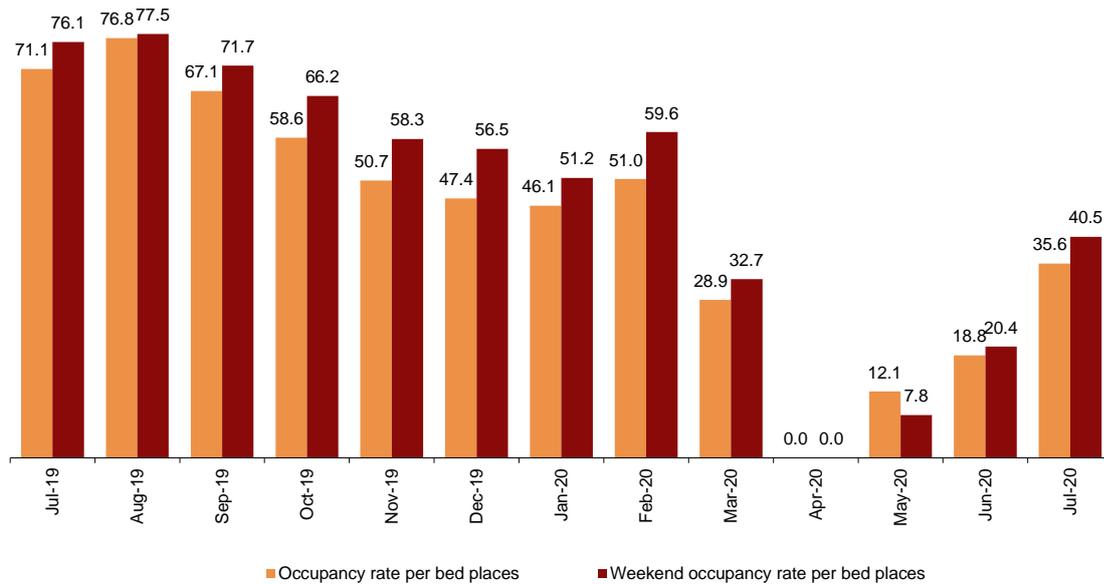
The main destination chosen by non-residents was Illes Balears, with 33.3% of total overnight stays. In this Autonomous Community, overnight stays by foreign nationals fell by 86.1% as compared to July 2019. Following this, the main destinations of non-residents were Cataluña (with 18.7% of the total overnight stays and a decrease of 87.7%) and Canarias (with 16.3% of the total and a decrease of 87.1%).

Hotel occupancy

In July, 35.6% of the available bed-places were occupied, indicating an annual decrease of 50.0%. The weekend occupancy rate by bed-places declined by 46.8%, standing at 40.5%.

Occupancy rate

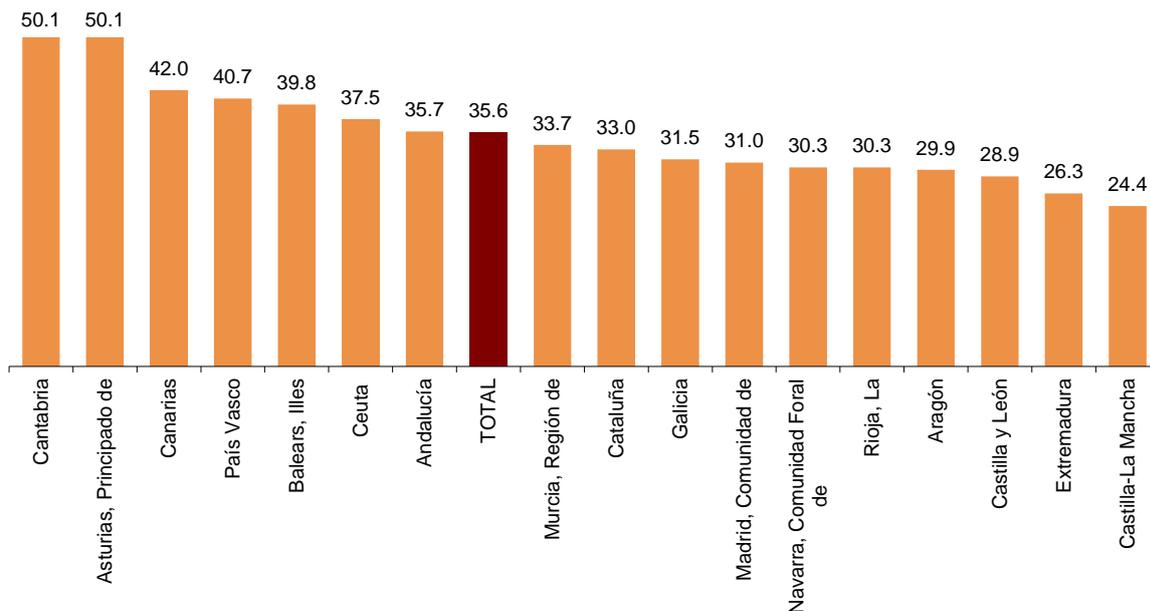
Percentage



Cantabria and Principado de Asturias had the highest occupancy rate by bed-places during July (50.1% each).

Occupancy rate per bed-places by Autonomous Community.

Percentage



By tourist areas, La Costa Verde had the highest occupancy level by bed-places (55.6%), while Terres de L'Ebre had the highest weekend occupancy rate (68.3%). The island of Mallorca registered the highest number of overnight stays, with 1.1 million.

The tourist spots with the most overnight stays were Madrid, Palma de Mallorca and Barcelona. Comillas had the highest occupancy rate by bed-places (71.2%) and Barbate the highest weekend occupancy rate (84.5%).

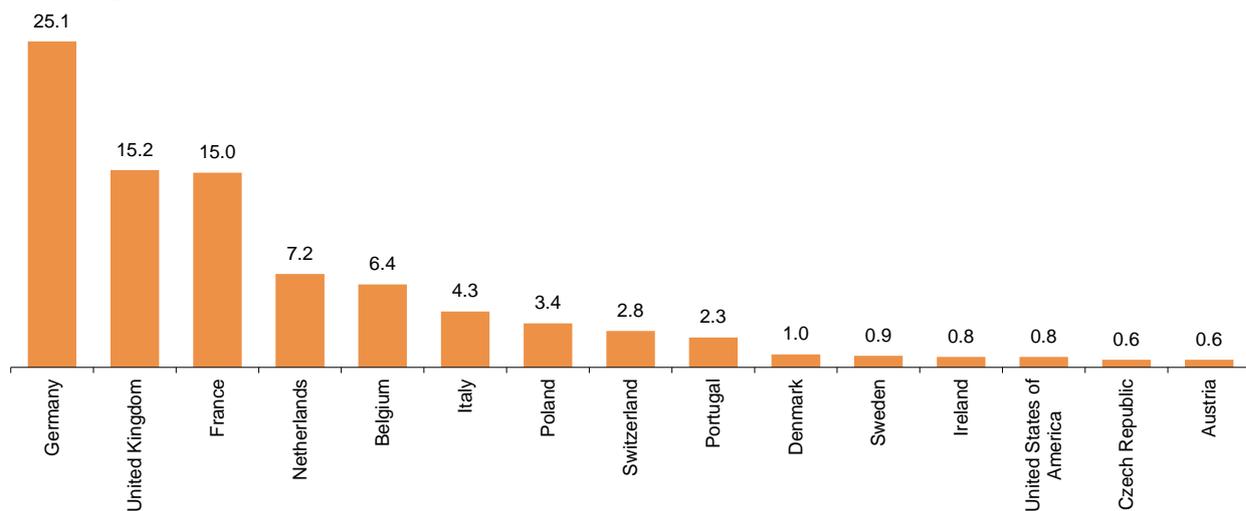
Overnight stays according to the country of origin of the travellers

Travellers from the Germany and the United Kingdom accounted for 25.1% and 15.2%, respectively, of total overnight stays of non-residents in hotel establishments in July. The German market had an annual variation rate of -79.4%, and the British market a rate of -91.4%.

Overnight stays of travellers from France, the Netherlands, and Belgium (the following countries of origin) registered annual rates of -72.6%, -75.4% and -71.7% respectively.

Distribution of non-residents overnight stays. Main country of residence

Percentage



Hotel Prices

The annual rate of the Hotel Prices Index (HPI) stood at -8.2% in July, which is 9.6 points below that registered last month and 3.5 points above that registered last month.

Hotel Price Index

National and breakdown by categories

	Índice	Tasa de variación anual
TOTAL	111,73	-8,22
HOTELES: Estrellas oro		
Cinco	101,24	-6,88
Cuatro	106,34	-8,76
Tres	123,52	-8,03
Dos	115,90	-5,49
Una	111,84	-11,26
HOSTALES: Estrellas plata		
Tres y dos	113,21	-9,92
Una	114,01	-6,71

By categories, the largest price decrease was recorded in establishments with one gold star (-11.3%).

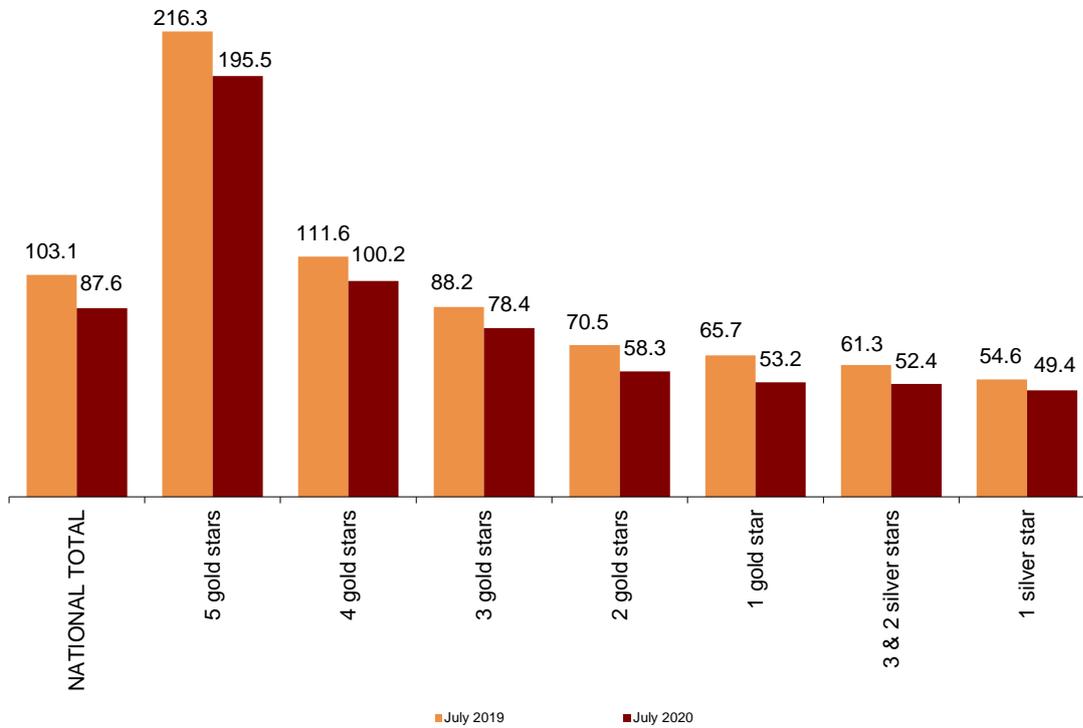
Hotel Sector Profitability

In July, the average daily rate per occupied room (ADR) was 87.6 euros, a decrease of 15.1% as compared to the same month in 2019.

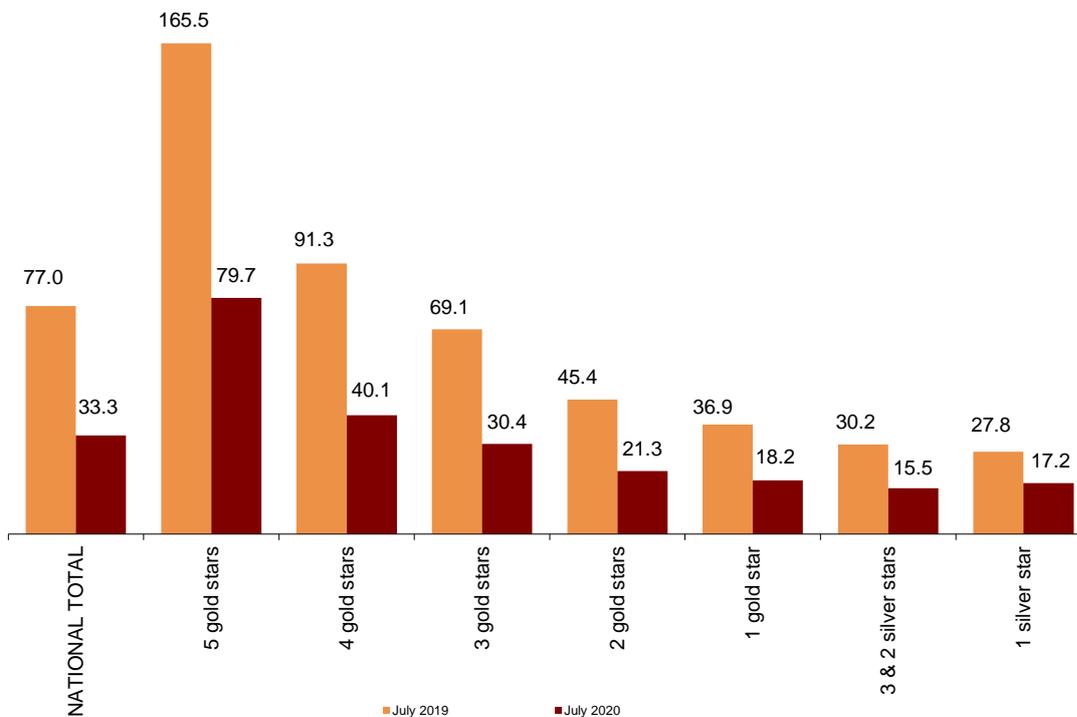
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 33.3 euros, with a 56.8% decrease.

By category, the average rate was 195.5 euros for five-star hotels, 100.2 euros for four-star hotels and 78.4 euros for three-star hotels. Revenue per available room for these same categories were 79.7, 40.1 and 30.4 euros, respectively.

Average daily rate by hotel category
Euros



Revenue per available room by hotel category
Euros



Revision and updating of data

Coinciding with today's publication, the INE has updated the data corresponding to July 2019 in the Hotel Occupancy Survey (HOS), the Hotel Price Index (HPI) and the Indicators on the Profitability of the Hotel Sector (IPHS).

Methodological note

The main objective of the Hotel Occupancy Survey (HOS) is to ascertain the behaviour of a series of variables that make it possible to describe the fundamental characteristics of the hotel sector, from the viewpoint of both supply and demand, thus meeting the needs of national institutions and the requirements of international organisations for knowledge regarding the sector.

The Hotel Price Index (HPI) is a statistical measure of the monthly evolution of prices applied to clients by hotel entrepreneurs.

The main objective of the Indicators of Profitability of the Hotel Sector (IRSH) is to facilitate decision-making in the hotel sector. These are the *Average Daily Rate* (ADR), which collects the average daily income per occupied room; and the *Revenue per Available Room* (RevPAR), which collects the average daily revenue per available room.

Type of operation: monthly continuous survey.

Population scope: all hotel establishments.

Geographical scope: the entire national territory.

Reference period of the results: the month.

Reference period of the information: seven consecutive days of each month, chosen randomly in such way that, between all the establishments, the entire month is covered.

Sample design: stratified sampling by province and establishment category, with 4 and 5 gold star categories being exhaustive.

Sample size: approximately 9,250 establishments in winter and 11,200 in summer.

Collection method: questionnaire filled in directly by the hotel establishment.

For more information on these statistical operations, you can consult the [methodology and the standardised methodological report](#) for each operation in INEbase.

For further information see **INEbase:** www.ine.es/en/ Twitter: [@es_ine](https://twitter.com/es_ine)

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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

July 2020

Provisional Data

24th August 2020

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	
TOTAL	4,330,564	3,217,885	1,112,680	11,496,862	7,433,836	4,063,025	2.65
HOTELS: Golden stars							
Five	186,825	109,926	76,899	565,894	261,015	304,879	3.03
Four	1,878,976	1,342,531	536,445	5,542,941	3,388,113	2,154,829	2.95
Three	1,138,388	838,089	300,299	2,941,482	1,875,667	1,065,815	2.58
Two	394,701	328,251	66,450	819,679	667,482	152,197	2.08
One	202,932	163,781	39,150	437,627	328,032	109,596	2.16
INNS: Silver stars							
Two and three	264,949	219,665	45,284	545,370	442,659	102,711	2.06
One	263,794	215,641	48,152	643,868	470,869	172,999	2.44
Annual rate	-64.28	-43.24	-82.76	-73.39	-50.01	-85.66	-25.49
Cumulative annual rate	-67.68	-59.62	-75.24	-71.14	-62.76	-75.58	-10.71

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

Category	Estimated open establishments	Estimated bedrooms	Estimated bed-places	Occupancy rate			Employed personnel
				Of bed-places	Of bed-places at weekend	Of bedrooms	
TOTAL	12,068	489,509	1,025,713	35.55	40.45	38.36	114,990
HOTELS: Golden stars							
Five	172	22,043	47,894	37.56	44.50	39.69	13,324
Four	1,613	208,246	454,942	38.39	42.81	40.67	56,211
Three	1,866	116,138	248,021	37.68	41.45	40.12	25,622
Two	1,641	42,962	84,778	30.97	37.86	36.15	7,022
One	1,125	23,828	46,748	30.05	37.29	34.21	3,355
INNS: Silver stars							
Two and three	2,535	38,065	72,401	24.20	29.76	28.97	4,955
One	3,116	38,228	70,929	29.21	35.13	34.12	4,500
Annual rate	-29.49	-44.61	-44.82	-50.02	-46.83	-48.40	-59.31

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 bed-places	Of bed-places at weekend	Of bedrooms		
Tourist area with a greater occupancy rate per month									
Costa Verde	86,703	6,406	213,308	13,869	55.57	61.19	57.02	2.44	1,528
Costa de Gipuzkoa	35,402	23,615	70,138	44,313	51.90	63.73	55.18	1.94	966
Terres de L'Ebre	29,160	3,159	68,142	9,540	48.21	68.29	50.79	2.40	568
Sur de Gran Canaria	34,943	22,287	128,776	156,202	47.35	40.33	47.15	4.98	3,023
Costa de La Luz de Cádiz	177,509	19,480	520,663	65,096	47.17	53.34	49.14	2.97	5,601
Isla de Fuerteventura	11,019	28,563	47,560	207,214	46.89	48.95	48.04	6.44	2,890
Isla de Gran Canaria	45,075	25,139	154,871	164,608	46.88	41.71	48.57	4.55	3,442
Costa de Bizkaia	7,706	1,953	16,084	3,727	45.94	54.82	55.89	2.05	170

Tourist area with a greater number of overnight stays per month¹

Isla de Mallorca	41,007	185,460	119,142	1,065,813	41.48	38.41	41.66	5.23	12,453
Costa del Sol	156,847	79,759	405,825	288,313	34.08	39.70	36.73	2.93	7,770
Costa Brava	163,741	106,395	345,248	346,913	39.35	50.39	40.98	2.56	5,786
Palma - Calvià	19,498	92,550	51,748	473,488	43.95	43.48	46.60	4.69	5,681
Costa Blanca	159,380	41,440	384,971	122,350	36.21	45.98	38.64	2.53	4,758
Costa Daurada	122,765	35,659	270,428	113,441	32.62	40.58	32.51	2.42	3,270
Costa de la Luz de Huelva	83,204	4,778	297,163	18,063	42.58	51.32	41.15	3.58	2,889
Rías Baixas	104,030	10,447	281,887	26,274	36.27	43.98	36.52	2.69	3,200

¹Sin considerar los incluidos en la tabla anterior, por aparecer también con mayor grado de ocupación.

Tourist site with a greater occupancy rate per month

Comillas	4,843	286	13,163	417	71.18	60.81	66.37	2.65	82
Valdés	5,093	796	9,161	981	66.61	69.10	57.21	1.72	65
Barbate	15,941	537	38,848	1,871	65.09	84.52	69.73	2.47	316
Llanes	15,159	736	46,794	2,010	64.68	62.59	63.24	3.07	279
Hondarribia	3,719	1,239	7,517	2,018	63.65	77.72	70.32	1.92	112
Níjar	11,319	294	32,380	791	63.50	74.28	65.91	2.86	192
Ribadesella	6,611	424	20,144	1,396	63.00	73.70	64.15	3.06	169
Palafrugell	13,236	4,281	22,890	9,443	62.78	77.33	64.08	1.85	337
Suances	11,016	351	24,677	690	62.49	75.73	62.13	2.23	175
Colunga	5,248	238	10,046	362	62.12	75.19	57.98	1.90	89

Tourist site with a greater number of overnight stays per month¹

Madrid	91,430	35,336	174,365	132,327	31.30	31.48	38.05	2.42	2,175
Palma de Mallorca	12,574	48,434	30,790	209,608	44.78	46.68	47.14	3.94	2,854
Barcelona	35,642	64,719	69,711	165,053	25.65	25.77	29.19	2.34	2,959
Calvià	4,696	35,741	15,829	218,409	40.44	38.81	42.34	5.79	2,355
San Bartolomé de Tirajana	24,595	18,248	92,229	134,564	50.96	42.98	48.92	5.29	2,600
Benidorm	46,743	14,444	137,713	54,348	31.93	40.01	32.02	3.14	2,003
Lloret de Mar	26,813	24,685	57,468	114,877	33.82	40.18	31.89	3.35	1,085
Pájara	6,840	18,032	32,409	138,903	48.82	51.26	49.42	6.89	2,026
Torremolinos	33,267	12,975	96,625	63,917	33.69	41.56	33.32	3.47	1,431
Valencia	46,799	27,412	90,624	67,623	38.58	51.19	45.75	2.13	1,370

¹Sin considerar los incluidos en la tabla anterior, por aparecer también con mayor grado de ocupación.

4. Guests and overnight stays by country of residence

Results by country

Countries	Number of guests		Overnight stays	
	Total	%	Total	%
TOTAL	4,330,564	100.00	11,496,862	100.00
Residents in Spain	3,217,885	74.31	7,433,836	64.66
Residents abroad	1,112,680	25.69	4,063,025	35.34
Total Residents abroad	1,112,680	100.00	4,063,025	100.00
TOTAL Residents in EU-27¹ (without Spain)	788,427	70.86	2,902,905	71.45
- Germany	188,442	16.94	1,020,618	25.12
- Austria	6,163	0.55	23,241	0.57
- Belgium	63,594	5.72	261,591	6.44
- Denmark	11,437	1.03	41,720	1.03
- Finland	3,688	0.33	11,231	0.28
- France	232,170	20.87	607,701	14.96
- Greece	1,763	0.16	3,964	0.10
- Ireland	10,146	0.91	32,603	0.80
- Italy	57,926	5.21	175,039	4.31
- Luxembourg	2,831	0.25	10,810	0.27
- Netherlands	77,304	6.95	292,169	7.19
- Poland	29,295	2.63	136,585	3.36
- Portugal	40,106	3.60	91,698	2.26
- Czech Republic	5,843	0.53	25,272	0.62
- Sweden	11,706	1.05	37,425	0.92
-Other EU-27 countries ²	46,013	4.14	131,236	3.23
Norway	2,929	0.26	8,910	0.22
United Kingdom	147,166	13.23	619,246	15.24
Russia	8,096	0.73	26,253	0.65
Switzerland	28,760	2.58	115,006	2.83
Rest of Europe	24,951	2.24	66,597	1.64
Japan	1,212	0.11	3,466	0.09
United States of America	12,518	1.13	31,545	0.78
Rest of America	47,137	4.24	160,510	3.95
Africa	18,382	1.65	45,346	1.12
Other countries	33,102	2.97	83,241	2.05

¹ Since 31 January 2020, The United Kingdom is no longer part of the E.U., hence the aggregate UE-27 is published.

² Countries included in Other UE-27 countries: Bulgaria, Cyprus, Croatia, Slovakia, Slovenia, Estonia, Hungary, Latvia, Lithuania, Malta and Romania

Hotel Price Index (HPI). 2008 Base

July 2020

Provisional data

1. National General Index and breakdown by Autonomous Cities and Communities

	Index	Annual growth rate
TOTAL	111.73	-8.22
Andalucía	100.70	-9.64
Aragón	64.22	1.33
Asturias, Principado de	100.13	1.26
Balears, Illes	146.38	-4.41
Canarias	130.66	2.20
Cantabria	100.31	-3.74
Castilla y León	94.02	-1.81
Castilla - La Mancha	92.27	1.20
Cataluña	97.10	-17.78
Comunitat Valenciana	107.96	-7.37
Extremadura	98.06	-1.26
Galicia	99.17	-3.78
Madrid, Comunidad de	74.65	-17.59
Murcia, Región de	83.33	-6.81
Navarra, Comunidad Foral de	75.07	-20.69
País Vasco	99.13	-19.63
Rioja, La	86.27	-2.75
Ceuta	101.11	-9.80
Melilla	97.95	-3.02

2. National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	111.73	-8.22
HOTELS: Gold stars		
Five	101.24	-6.88
Fourth	106.34	-8.76
Three	123.52	-8.03
Two	115.90	-5.49
One	111.84	-11.26
HOSTALS: Silver stars		
Three and two	113.21	-9.92
One	114.01	-6.71

Indicators on the Profitability of the Hotel Sector July 2020

Provisional data

National ADR and RevPAR¹ and breakdown by Autonomous Cities and Communities

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	87.58	-15.09	33.25	-56.79
Andalucía	96.94	-10.08	37.66	-51.47
Aragón	58.29	2.02	19.17	-33.76
Asturias, Principado de	71.60	6.91	38.50	-5.48
Balears, Illes	127.75	0.93	49.69	-55.96
Canarias	92.64	-6.14	38.95	-50.50
Cantabria	83.94	-2.53	42.44	-26.06
Castilla y León	56.70	-0.82	18.55	-31.65
Castilla - La Mancha	53.81	-2.14	15.63	-25.56
Cataluña	84.79	-22.04	30.10	-64.94
Comunitat Valenciana	85.70	-9.26	33.20	-55.87
Extremadura	57.70	-0.52	17.62	-28.86
Galicia	63.63	-0.65	21.13	-40.50
Madrid, Comunidad de	57.21	-34.28	21.49	-65.92
Murcia, Región de	67.49	-14.01	22.75	-53.10
Navarra, Comunidad Foral de	62.95	-30.88	23.70	-54.71
País Vasco	87.69	-19.16	40.55	-52.80
Rioja, La	62.26	-1.03	22.12	-32.27
Ceuta	66.15	-6.31	27.15	-42.49
Melilla	64.60	-12.15	17.79	-61.96

¹ ADR: Average Daily Rate
RevPAR: Revenue per Available Room

National ADR and RevPar¹ and breakdown by categories

	ADR (in euros)	Annual growth rate	RevPar (in euros)	Annual growth rate
TOTAL	87.58	-15.09	33.25	-56.79
HOTELS: Gold stars				
Five	195.46	-9.64	79.67	-51.87
Four	100.24	-10.20	40.12	-56.05
Three	78.43	-11.05	30.37	-56.03
Two	58.28	-17.35	21.30	-53.09
One	53.18	-18.99	18.15	-50.81
GUESTHOUSES: Silver stars				
Three and two	52.41	-14.49	15.48	-48.81
One	49.42	-9.41	17.17	-38.29

¹ ADR: Average Daily Rate
RevPAR: Revenue per Available Room