

23 September 2020

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

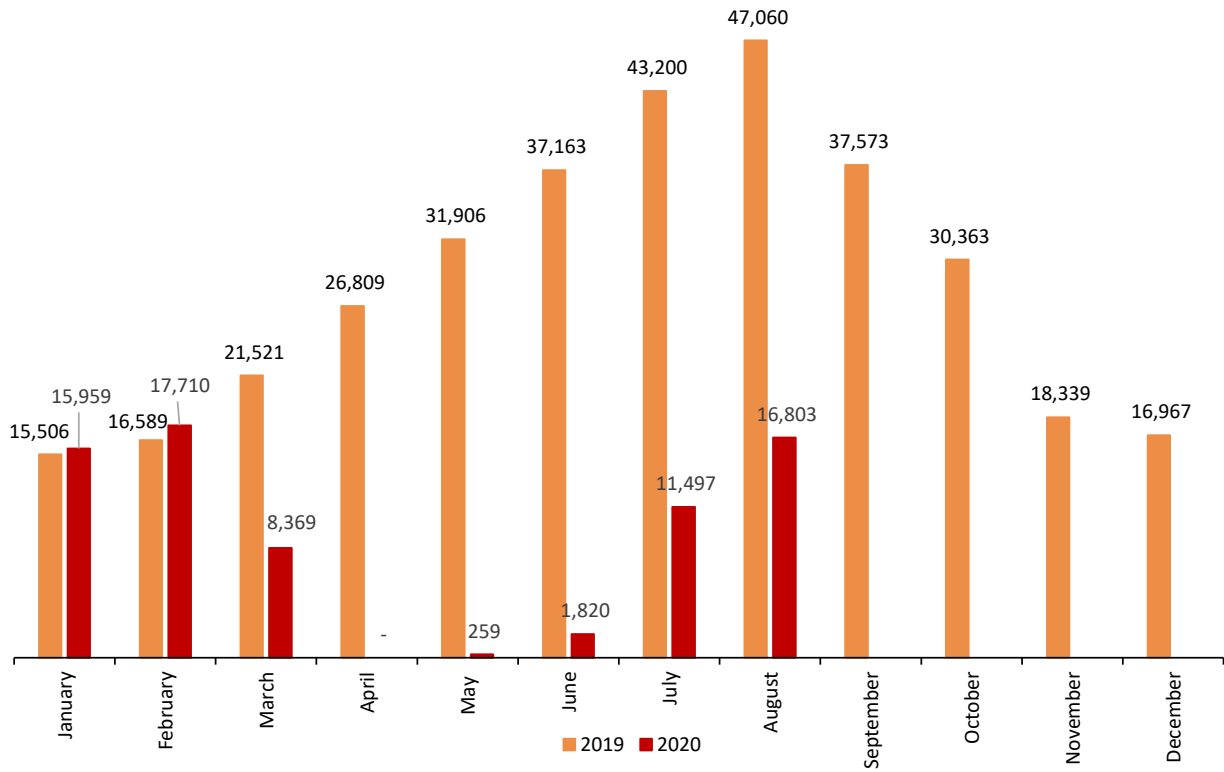
Overnight stays in hotel establishments decrease by 64.3% in August as compared with the same month of 2019

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

- In the month of August, the number of open establishments increased compared to July, from 12,068 to 13,008. However, they remained 23.2% less than in August 2019. The total number of bed-places offered was 1,196,259, or 61.4% of the total.
- Hotel establishments received 5.8 million travellers in August, who made 16.8 million overnight stays. These figures represent 45.2% and 35.7%, respectively, of the estimated totals a year ago. Four-star hotels were the most visited.
- Resident in Spain supported hotel activity in August to a greater extent (4.6 million, compared to 1.2 million non-residents), and this was also reflected in overnight stays (12.0 million residents, compared to 4.7 million non-residents).
- The average stay decreased by 21.1% as compared to a year ago, standing at 2.9 overnight stays per traveller.
- Hotel prices were down 9.6% compared to August 2019.
- Cantabria (70.6%) and Principado de Asturias (68.2%) were the autonomous communities with the highest degree of hotel occupancy in August. Hotels in Colunga and Ribadesella (Principado de Asturias), Suances (Cantabria) and Broto (Huesca) were the tourist spots that registered the highest occupancy, above 80%.
- During the aggregate July-August period, the number of overnight stays decreased 68.6% as compared with the same period in 2019. Resident overnight stays decreased by 41.3% and non-resident overnight stays did so by 84.5%.
- In the first eight months of 2020, there were 72.4 million overnight stays, 69.8% less than the same period for 2019.

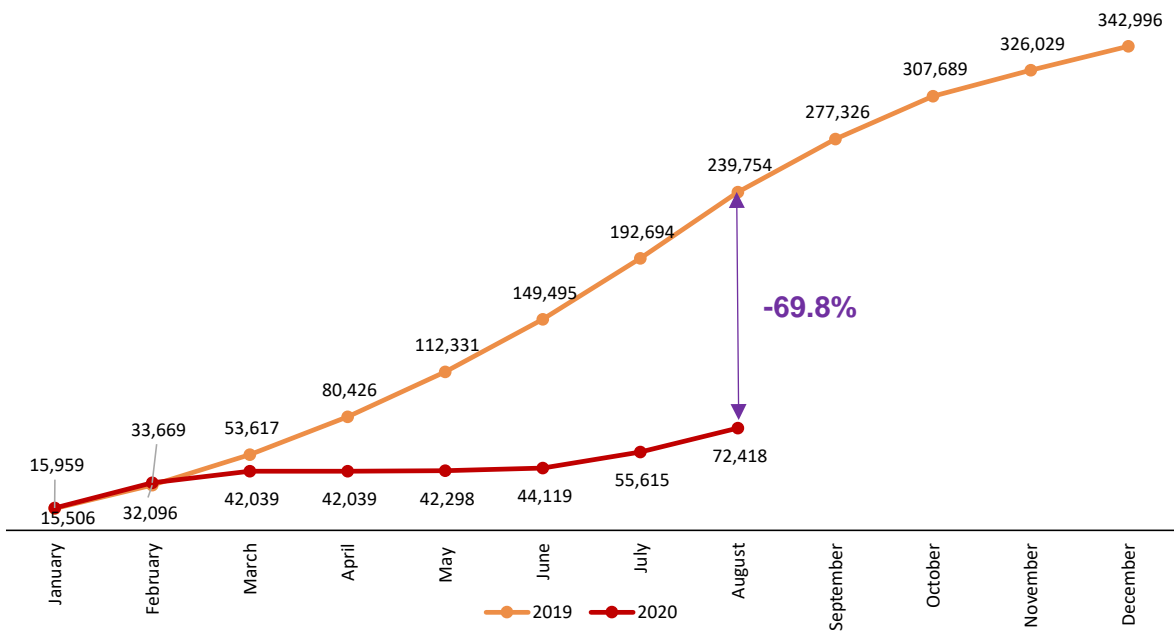
Overnight stays. Comparison 2019-2020

Thousands



Cumulative overnights. Comparison 2019-2020

Thousands



Open establishments

In August, a total of 13,008 hotels were open in Spain, 23.2% less than in the same month of 2019. This represents 67.4% of the total directory of establishments in that month.

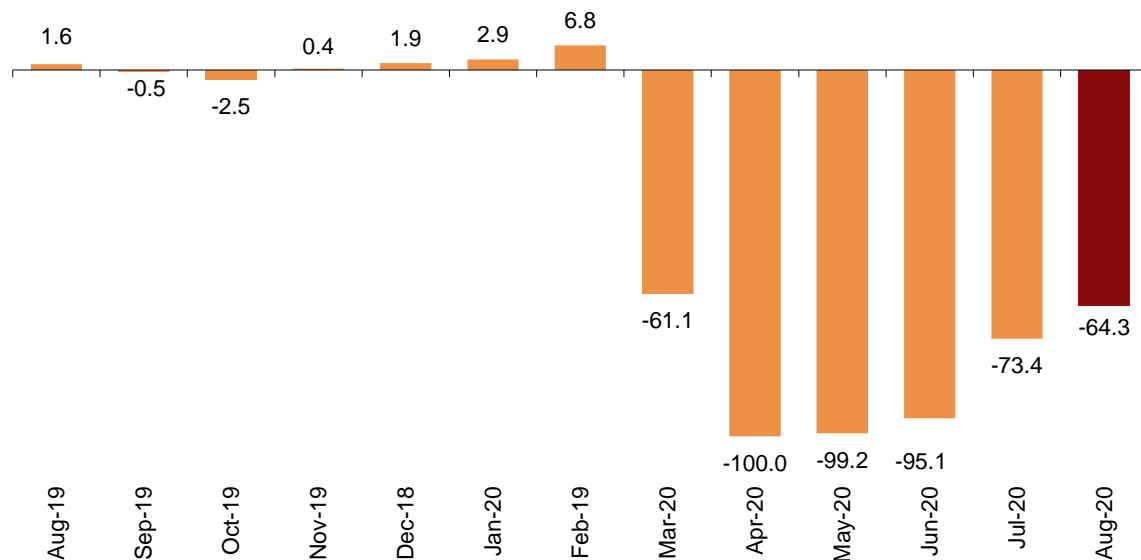
Categoría	Número establecimientos abiertos estimados según la encuesta	Porcentaje sobre el total de establecimientos de directorio	Número de habitaciones estimadas según la encuesta	Porcentaje sobre el total de habitaciones de directorio	Número de plazas estimadas según la encuesta	Porcentaje sobre el total de plazas de directorio
TOTAL	13.008	67,4	566.588	61,0	1.196.259	61,4
HOTELES: Estrellas oro						
Cinco	218	60,4	31.444	58,4	68.928	59,8
Cuatro	1.851	64,2	248.419	61,7	543.565	62,0
Tres	2.048	65,3	134.285	54,3	290.413	55,3
Dos	1.758	74,1	46.018	62,6	91.114	63,1
Una	1.200	78,8	25.946	77,8	51.108	78,5
HOSTALES: Estrellas plata						
Tres y dos	2.682	70,2	40.357	69,9	76.257	69,4
Una	3.250	62,4	40.119	66,4	74.874	67,5
Tasa anual	-23,2		-35,8		-35,6	

Overnight stays

Overnight stays in hotel establishments reached 16.8 million in August, representing a decrease of 64.3% compared to the 47.0 million for the same month of 2019.

Annual variation rate for overnight stays

Percentage



During the aggregate July-August period, the number of overnight stays increased 68.6% as compared with the same period in 2019. Resident overnight stays decreased by 41.3% and non-resident overnight stays did so by 84.5%.

During the first eight months of 2020, overnight stays decreased 69.8%, as compared with the same period of the previous year.

By country of residence, overnight stays by residents of Spain decreased by 34.1% in the annual rate, exceeding 12.0 million. In turn, overnight stays by non-residents fell by 83.4%, reaching 4.7 million.

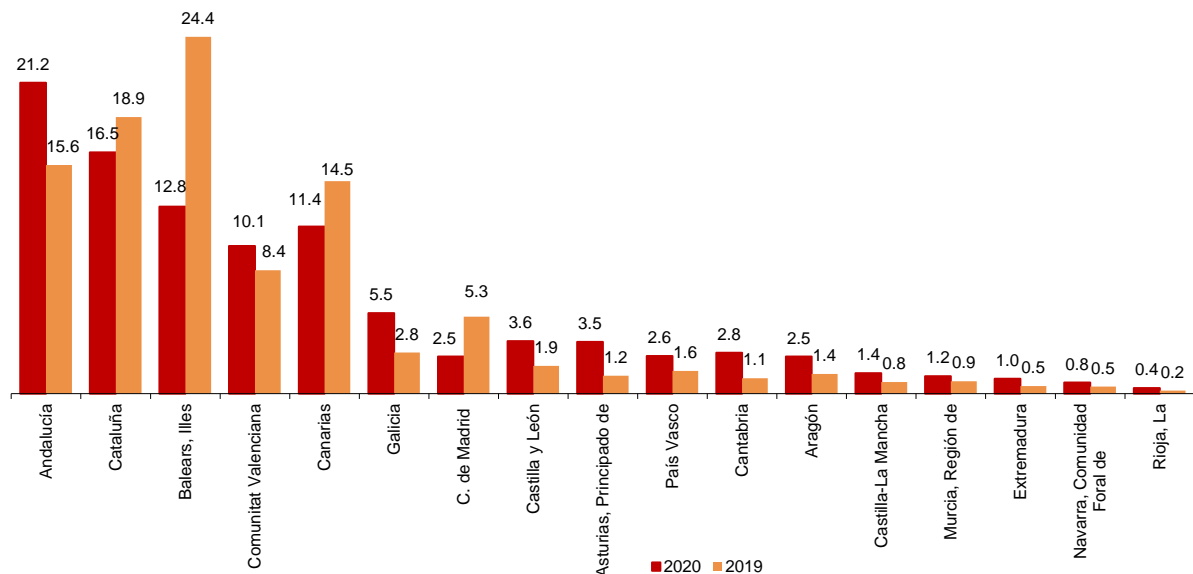
Furthermore, the average stay decreased 21.1% compared to August 2019, standing at 2.9 overnight stays per traveller.

Destinations

Andalucía, Cataluña, and Illes Balears were the main destinations of residents in Spain in August, with annual variation rates in the number of overnight stays of -53.0%, -68.9% and -80.2%, respectively.

Distribution of overnight stays Comparison May 2019-2020

Percentage



In August, the main destinations of travellers residing in Spain were Andalusia, Cataluña and the Comunitat Valenciana, which presented annual variation rates in the number of overnight stays of -33.2%, -19.8% and -45.9% respectively.

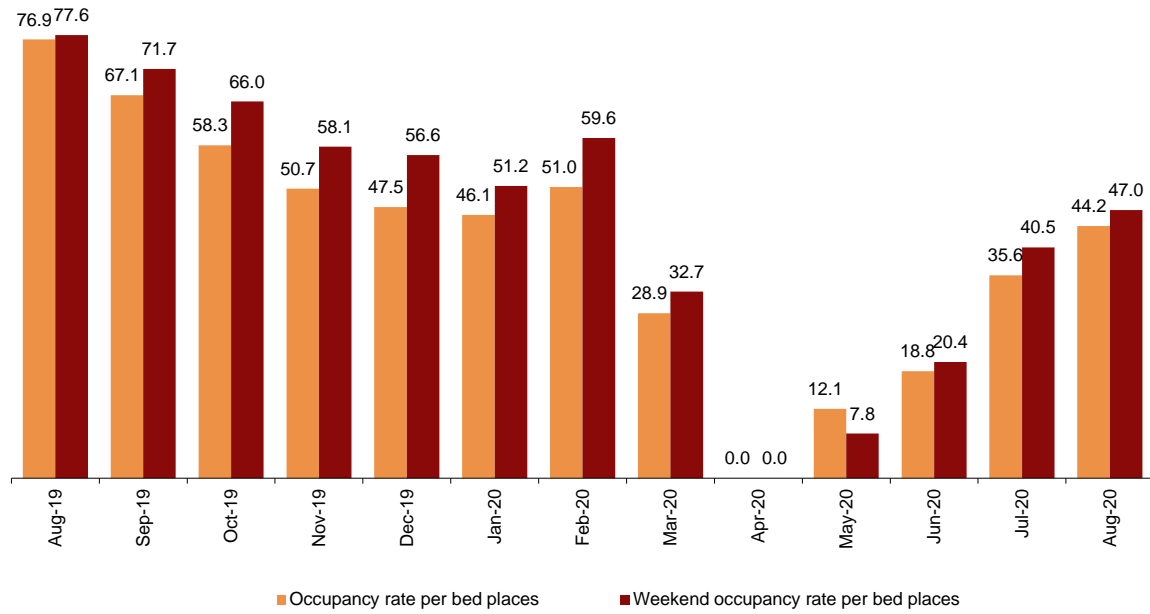
The main destination chosen by non-residents was Illes Balears, with 29.7% of total overnight stays. In this Autonomous Community, overnight stays by foreign nationals decreased 85.6% as compared to August 2019. The next most popular destinations of non-residents were Canarias (with 21.6% of the total overnight stays and a decrease of 79.9%) and Cataluña (with 16.0% of the total and a decrease of 88.1%).

Hotel occupancy

In August, 44.2% of the available bed-places were covered, with an annual decrease of 42.5%. The weekend occupancy rate by bed-places declined by 39.5%, standing at 47.0%.

Occupancy rate

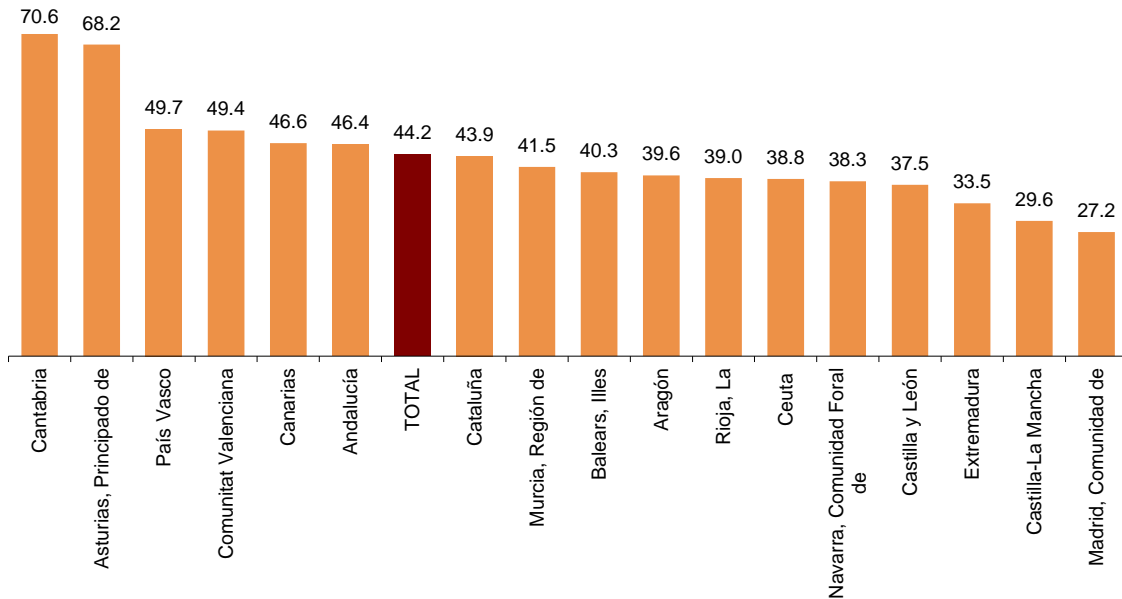
Percentage



Cantabria showed the highest occupancy rate by bed-places in August (70.6%). It was followed by Principado de Asturias, with 68.2%.

Occupancy rate per bed-places by Autonomous Community

Percentage



By tourist areas, La Costa Verde reached both the highest level of occupancy by bed-places (70.6%), and the greatest weekend occupancy rate (70.8%). The island of Mallorca registered the highest number of overnight stays, with 1.4 million.

The tourist spots with the most overnight stays were San Bartolomé de Tirajana, Benidorm and Palma de Mallorca. Colunga reached the highest occupancy rate by bed-places (88.8%) and the greatest weekend occupancy rate (89.7%).

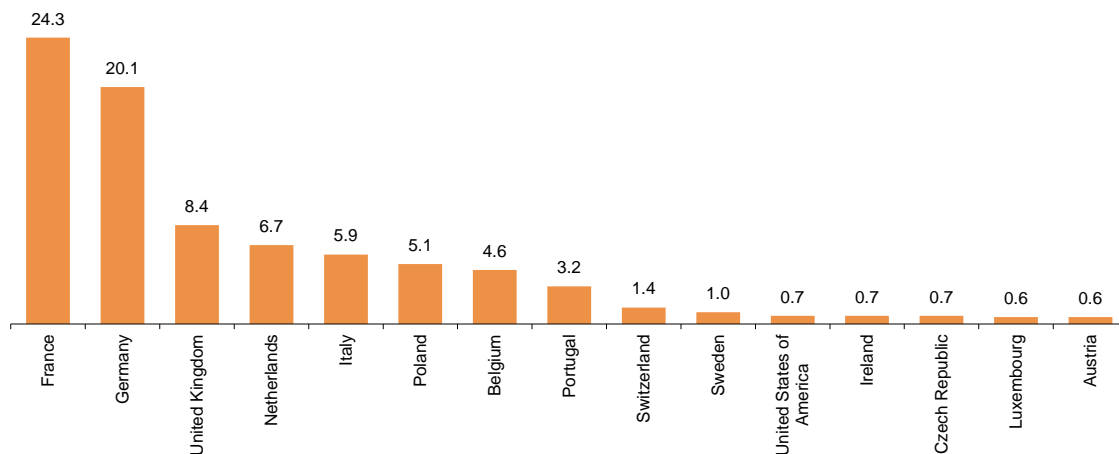
Overnight stays according to the country of origin of the travellers

In August, travellers from France and Germany concentrated 24.3% and 20.1% of total overnight stays of non-residents in hotel establishments, respectively. The French market had an annual variation rate of -67.0%, and the German market a rate of -79.4%.

Overnight stays of travellers from the United Kingdom, the Netherlands and Italy (the following countries of origin) registered annual rates of -94.5%, -73.7% and -85.0%, 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 -9.6% in August, which is 11.8 points below that registered last month and 1.4 point less than that registered last month.

Hotel Price Index

National and breakdown by categories

	Índice	Tasa de variación anual
TOTAL	111,33	-9,65
HOTELES: Estrellas oro		
Cinco	101,22	-9,34
Cuatro	105,37	-11,03
Tres	124,85	-7,78
Dos	113,13	-6,27
Una	117,08	-8,99
HOSTALES: Estrellas plata		
Tres y dos	107,74	-10,43
Una	114,92	-6,74

By categories, the largest price decrease was recorded in establishments with four gold stars (-11.0%).

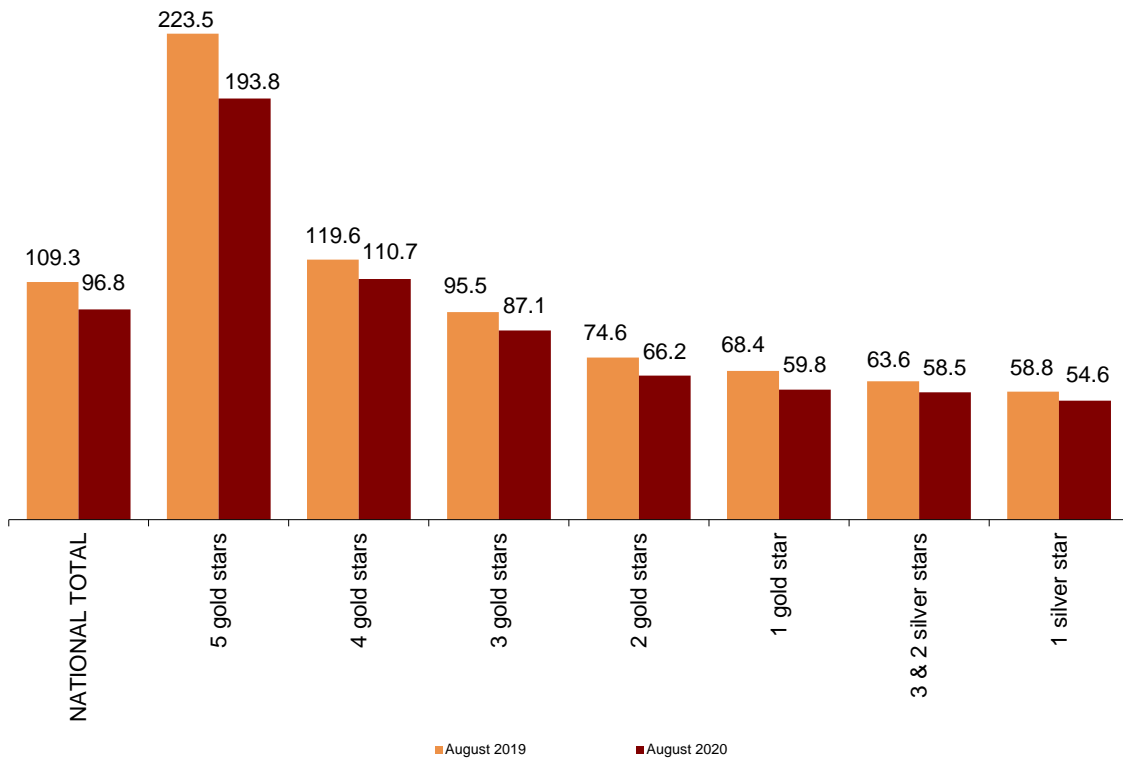
Hotel Sector Profitability

In August, the average daily rate per occupied room (ADR) was 96.8 euros, a decrease of 11.5% as compared to the same month in 2019.

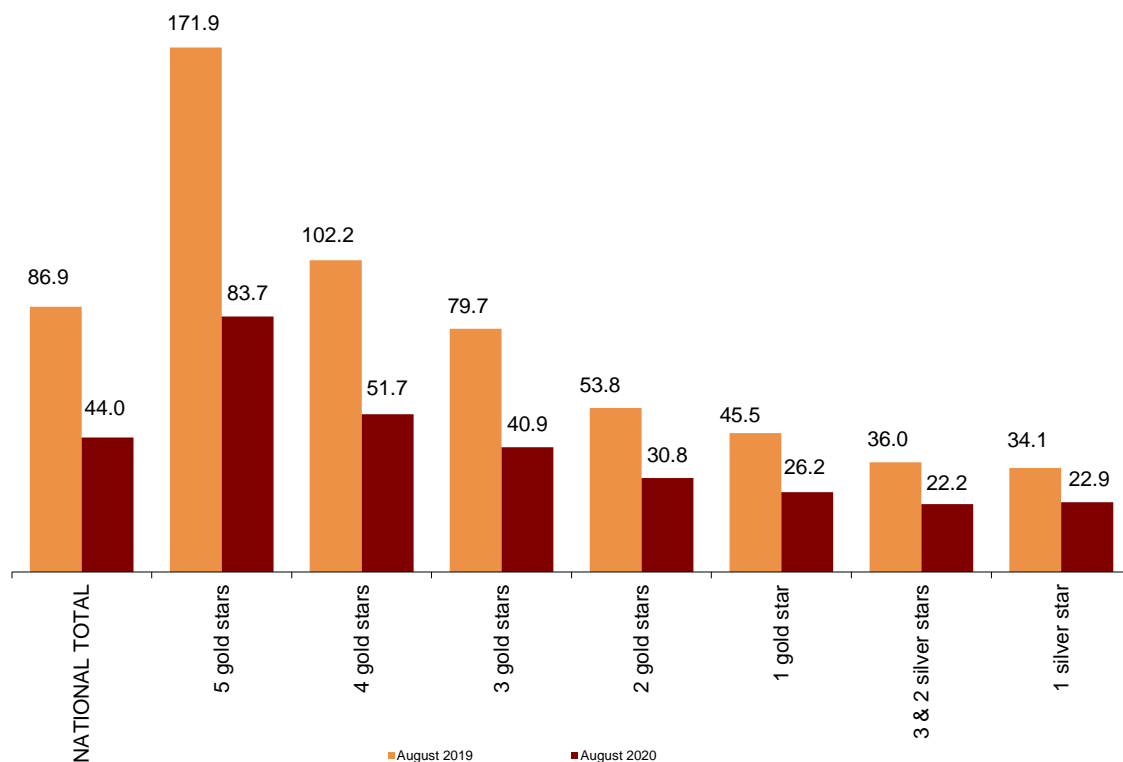
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 44.0 euros, with a 49.3% decrease.

By category, the average rate was 193.8 euros for five-star hotels, 110.7 euros for four-star hotels and 87.1 euros for three-star hotels. Revenue per available room for these same categories were 83.7, 51.7 and 40.9 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 the month of August 2019 of the Hotel Price Index (HPI) and of 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)

August 2020

Provisional Data

23rd September 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	5,892,395	4,637,629	1,254,766	16,802,742	12,016,967	4,785,775	2.85
HOTELS: Golden stars							
Five	275,581	180,667	94,914	923,683	533,913	389,770	3.35
Four	2,528,816	1,939,885	588,931	8,085,396	5,564,702	2,520,694	3.20
Three	1,518,041	1,186,031	332,010	4,236,523	2,963,510	1,273,013	2.79
Two	550,144	473,429	76,715	1,236,621	1,047,750	188,872	2.25
One	279,236	233,727	45,509	622,054	527,388	94,666	2.23
INNS: Silver stars							
Two and three	381,375	326,792	54,583	821,142	703,991	117,151	2.15
One	359,203	297,100	62,103	877,323	675,714	201,609	2.44
Annual rate	-54.77	-27.91	-80.98	-64.29	-34.14	-83.39	-21.06
Cumulative annual rate	-65.43	-54.03	-76.22	-69.79	-56.62	-77.04	-12.62

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	13,008	566,588	1,196,259	44.20	47.00	45.86	139,318
HOTELS: Golden stars							
Five	218	31,444	68,928	42.56	45.08	43.05	18,085
Four	1,851	248,419	543,565	46.48	48.95	47.25	68,236
Three	2,048	134,285	290,413	45.81	48.00	47.45	30,342
Two	1,758	46,018	91,114	43.26	47.97	47.16	7,894
One	1,200	25,946	51,108	38.86	42.07	42.55	3,842
INNS: Silver stars							
Two and three	2,682	40,357	76,257	34.47	38.04	38.09	5,676
One	3,250	40,119	74,874	37.64	42.03	42.58	5,242
Annual rate	-23.22	-35.76	-35.56	-42.49	-39.46	-42.07	-51.33

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	104,492	6,130	293,222	13,868	70.56	70.76	72.33	2.78	1,756
Isla de El Hierro	1,139	41	4,960	153	65.27	64.27	73.48	4.33	44
Costa de Gipuzkoa	41,901	25,210	96,816	52,803	65.11	69.17	68.01	2.23	1,072
Terres de L'Ebre	35,810	3,008	95,688	8,882	63.68	69.81	63.70	2.69	575
Val d'Aran	30,568	2,589	95,060	5,489	61.42	59.89	63.59	3.03	508
Costa de La Luz de Cádiz	218,415	25,088	714,728	83,242	60.82	64.91	64.25	3.28	6,184
Pirineus	99,434	5,122	241,426	9,301	60.24	62.18	64.95	2.40	1,514
Costa da Morte	25,683	2,309	49,664	3,296	59.23	63.24	60.67	1.89	331

Tourist area with a greater number of overnight stays per month¹

Isla de Mallorca	111,303	173,127	363,395	1,060,932	38.96	36.66	39.13	5.01	14,980
Costa Brava	278,525	102,310	737,878	327,130	52.94	56.19	53.82	2.80	6,831
Costa del Sol	236,905	91,416	704,036	354,958	45.41	47.49	47.41	3.23	8,986
Costa Blanca	244,881	50,924	689,572	163,182	53.23	57.90	54.44	2.88	5,887
Costa Daurada	201,316	47,454	506,396	148,611	47.98	51.65	47.68	2.63	3,604
Palma - Calvià	45,981	86,141	150,201	484,307	41.33	38.32	41.20	4.80	6,476
Isla de Gran Canaria	79,763	36,492	308,695	294,116	52.18	58.38	53.09	5.19	6,082
Sur de Gran Canaria	68,115	33,710	274,132	282,203	52.82	58.99	52.38	5.46	5,622

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

Colunga	5,608	326	15,493	723	88.83	89.68	89.33	2.73	109
Ribadesella	8,797	284	28,713	1,501	86.29	88.79	87.19	3.33	171
Suances	12,656	218	34,736	480	80.71	79.81	80.53	2.74	214
Broto	4,254	484	11,754	1,079	80.67	82.70	81.81	2.71	32
Níjar	13,450	472	40,060	1,596	78.65	82.18	83.69	2.99	214
Arnuero	12,825	434	39,466	1,041	77.83	86.56	84.37	3.05	260
Villaviciosa	4,691	73	16,712	452	77.17	71.33	70.86	3.60	88
Vall de Boí, La	11,395	229	34,449	677	76.73	70.26	79.15	3.02	252
Cangas de Onís	24,545	1,221	60,750	2,260	76.02	75.89	83.42	2.45	366
Valdés	6,628	487	10,879	740	75.99	78.97	70.92	1.63	79

Tourist site with a greater number of overnight stays per month¹

San Bartolomé de Tirajana	51,157	27,514	204,270	231,794	53.99	59.43	53.32	5.54	4,600
Benidorm	84,937	22,079	282,740	87,818	52.56	54.18	50.81	3.46	2,706
Palma de Mallorca	30,823	54,387	111,891	249,885	42.35	39.77	40.62	4.25	3,590
Lloret de Mar	64,065	31,783	173,198	145,768	49.33	49.64	45.34	3.33	1,600
Pájara	13,454	25,386	71,056	218,532	50.94	50.14	51.65	7.46	2,834
Madrid	73,330	37,164	152,344	130,633	26.95	28.10	31.47	2.56	2,539
Calvià	14,927	29,813	50,526	213,876	38.14	34.65	38.39	5.91	2,656
Torremolinos	51,305	13,959	177,655	78,176	44.41	43.55	46.45	3.92	1,625
Salou	54,187	22,496	164,844	85,121	49.53	52.31	46.07	3.26	996
Adeje	27,327	18,750	96,390	141,726	40.09	44.44	40.98	5.17	4,128

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	5,892,395	100.00	16,802,742	100.00
Residents in Spain	4,637,629	78.71	12,016,967	71.52
Residents abroad	1,254,766	21.29	4,785,775	28.48
Total Residents abroad	1,254,766	100.00	4,785,775	100.00
TOTAL Residents in EU-27¹ (without Spain)	932,451	74.31	3,738,222	78.11
- Germany	153,006	12.19	962,551	20.11
- Austria	6,243	0.50	27,201	0.57
- Belgium	51,122	4.07	220,231	4.60
- Denmark	5,458	0.43	19,513	0.41
- Finland	1,987	0.16	5,908	0.12
- France	362,463	28.89	1,160,938	24.26
- Greece	1,949	0.16	5,056	0.11
- Ireland	10,729	0.86	33,504	0.70
- Italy	78,117	6.23	283,588	5.93
- Luxembourg	5,665	0.45	27,445	0.57
- Netherlands	73,722	5.88	322,388	6.74
- Poland	39,393	3.14	245,208	5.12
- Portugal	61,722	4.92	153,287	3.20
- Czech Republic	7,136	0.57	32,892	0.69
- Sweden	11,002	0.88	45,562	0.95
-Other EU-27 countries ²	62,737	5.00	192,948	4.03
Norway	1,671	0.13	5,569	0.12
United Kingdom	107,910	8.60	402,748	8.42
Russia	9,124	0.73	29,193	0.61
Switzerland	15,698	1.25	67,743	1.42
Rest of Europe	34,955	2.79	112,450	2.35
Japan	2,123	0.17	4,238	0.09
United States of America	13,634	1.09	34,154	0.71
Rest of America	65,513	5.22	201,535	4.21
Africa	27,409	2.18	70,597	1.48
Other countries	44,278	3.53	119,326	2.49

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 August 2020

Provisional data

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

	Index	Annual growth rate
TOTAL	111.33	-9.65
Andalucía	98.71	-11.91
Aragón	70.59	-1.47
Asturias, Principado de	103.81	1.74
Balears, Illes	139.03	-8.94
Canarias	126.04	-0.60
Cantabria	109.49	0.88
Castilla y León	93.55	-3.64
Castilla - La Mancha	93.49	3.76
Cataluña	101.85	-16.79
Comunitat Valenciana	105.09	-10.47
Extremadura	100.70	0.15
Galicia	99.51	-5.52
Madrid, Comunidad de	79.60	-10.37
Murcia, Región de	89.57	-4.55
Navarra, Comunidad Foral de	95.31	-2.75
País Vasco	102.86	-19.70
Rioja, La	93.34	-1.51
Ceuta	95.20	-7.64
Melilla	102.52	-0.20

2. National General Index and breakdown by categories

	Index	Annual growth rate
TOTAL	111.33	-9.65
HOTELS: Gold stars		
Five	101.22	-9.34
Fourth	105.37	-11.03
Three	124.85	-7.78
Two	113.13	-6.27
One	117.08	-8.99
HOSTALS: Silver stars		
Three and two	107.74	-10.43
One	114.92	-6.74

Indicators on the Profitability of the Hotel Sector

August 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	96.77	-11.45	44.02	-49.32
Andalucía	109.96	-9.67	53.27	-44.99
Aragón	66.77	2.03	27.73	-30.21
Asturias, Principado de	89.48	8.90	63.17	-0.69
Balears, Illes	133.53	-2.25	53.72	-57.19
Canarias	99.54	-4.25	48.44	-43.97
Cantabria	102.54	2.35	75.33	-3.43
Castilla y León	59.46	-0.29	23.52	-32.41
Castilla - La Mancha	57.52	2.01	18.86	-20.15
Cataluña	96.20	-12.68	42.85	-53.80
Comunitat Valenciana	92.95	-12.09	46.20	-48.21
Extremadura	62.99	1.33	22.25	-27.21
Galicia	70.74	-0.65	32.13	-33.87
Madrid, Comunidad de	55.14	-25.83	16.40	-64.45
Murcia, Región de	75.21	-9.32	29.87	-47.99
Navarra, Comunidad Foral de	67.50	-2.25	29.46	-38.53
País Vasco	93.77	-19.38	49.73	-50.20
Rioja, La	64.65	-2.68	26.28	-36.65
Ceuta	70.53	-5.28	27.39	-48.58
Melilla	68.99	-2.54	19.17	-65.05

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	96.77	-11.45	44.02	-49.32
HOTELS: Gold stars				
Five	193.75	-13.33	83.68	-51.31
Four	110.66	-7.45	51.70	-49.40
Three	87.08	-8.82	40.90	-48.66
Two	66.20	-11.26	30.77	-42.76
One	59.84	-12.47	26.18	-42.40
GUESTHOUSES: Silver stars				
Three and two	58.50	-8.05	22.23	-38.19
One	54.63	-7.09	22.90	-32.80

¹ ADR: Average Daily Rate

RevPAR: Revenue per Available Room