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A Portrait of Our Tourists



In this number...

Non-resident tourists

The resident tourist

Distribution by type of accommodation

Overnight stays in hotels establishments, country of residence and preferred destinations

The slowdown in most countries' tourism activity between the first and second quarters of 2020 due to the covid-19 pandemic raised many questions about the sector's recovery during the rest of the year. This edition of INE Figures thus offers an informational overview of the resident tourists who travelled from their place habitual residence and the non-residents who visited us in 2019 and 2018, analysing access routes, where they stayed, how much they spent and main destinations visited.

In 2019, hotels accounted for 65.4% of overnight stays by non-resident travellers, and 21.2% of those by resident tourists. Among the tourist accommodations on the market*, overnight hotel stays represented

73.1% of the total. We analyse this indicator's distribution by provinces and main destinations according to country of residence, highlighting the strong presence of non-residents on the islands, in large cities and in some coastal provinces.

Sources: INE (Statistics on Tourist Movements at the Borders, Tourist Expenditure Survey, Resident Tourism Survey, Hotels: Occupancy Survey, Price Index and Profitability Indicators, Campsites: Occupancy Survey and Price Index, Tourist Apartments: Occupancy Survey and Price Index, Rural Tourism Accommodations: Occupancy Survey and Price Index and Hostels: Occupancy Survey), Association of Land and Mercantile Registrars of Spain (Property Statistics).



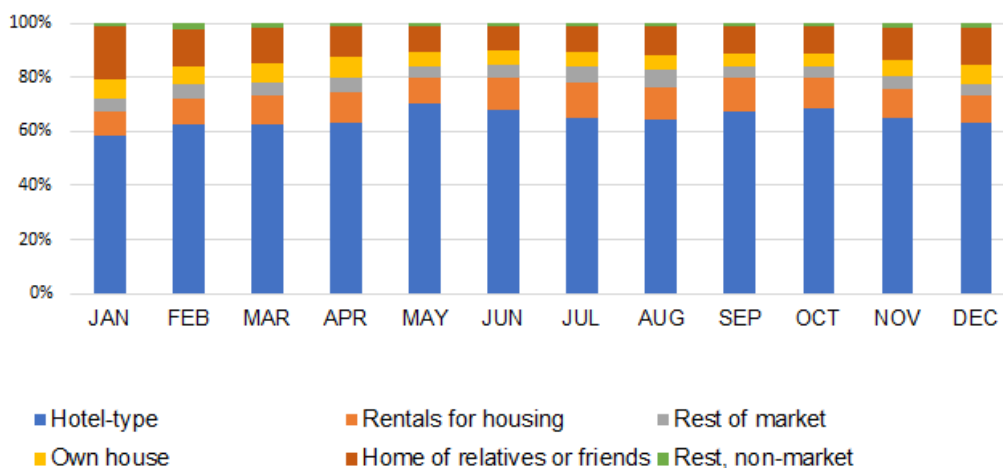
Leisure, Plane, and Hotel

83.7 million non-resident travellers visited us in 2019. 87.4% of these visits were made for leisure, recreation and holidays and 6.4% were for business and professional reasons. The leisure motivation predominates throughout the year, with a high in August and a low in January. The highest number of visitors for leisure was recorded in August, and the highest number of visitors for business in June.

The main access route for these travellers was airports (82.1%), followed by highways (15.2%), ports (2.3%) and, to a much lesser extent, trains (0.4%). The most airport entries were in July and the most highway entries in August, while the peak month for ports was September and July for trains.

According to the survey on Tourist Movements at Borders, non-resident tourists stayed primarily in market establishments* (hotels, 65.4%; rental housing, 11.3%; rest, 5.0%). A significant number used non-market accommodations, such as staying with family or friends or in properties they owned (11.3% and 5.9%, respectively). In almost all cases, the maximum occupancy for these tourists was reached in August, except in rental housing, where the maximum was reached in July.

Non-resident tourists according to primary accommodation. 2019



British, Germans and French were those who visited us the most

The non-resident tourists who visited us the most in 2019 were residents of the United Kingdom (21.6% of the total), Germany (13.4%) and France (13.3%). Lagging behind were residents of Italy (5.4%), the Netherlands (4.4%), the United States (4.0%) and Belgium (3.0%).

One week, on average

When the twelve months of the year are aggregated, expenditure of non-resident tourists exceeded 92.2 billion euros in 2019. This comes to 1,102 euros per tourist. The average daily expenditure was 154 euros and the average trip duration was 7.2 days. The highest total expenditure value came in the months of July and August, coinciding with the largest number of visitors. The highest average daily expenditure per person was in the months of May and June (163 euros), and the highest average duration was in January (8.05 days) and August (7.97 days).



* Market accommodation is considered hotels, aparthotels, pensions, hostels, inns and the like, rental dwellings or rooms, rural tourism accommodations, hostels, campsites and any other paid accommodation service, even if payment is subsidized. Non-market accommodations are those provided free of charge by family or friends, as well as owned vacation homes, shared-use dwellings (timeshare), house swaps between two individuals and other trips where the night is spent camping outdoors, in the car, in a caravan parked outside a camping site, etc.

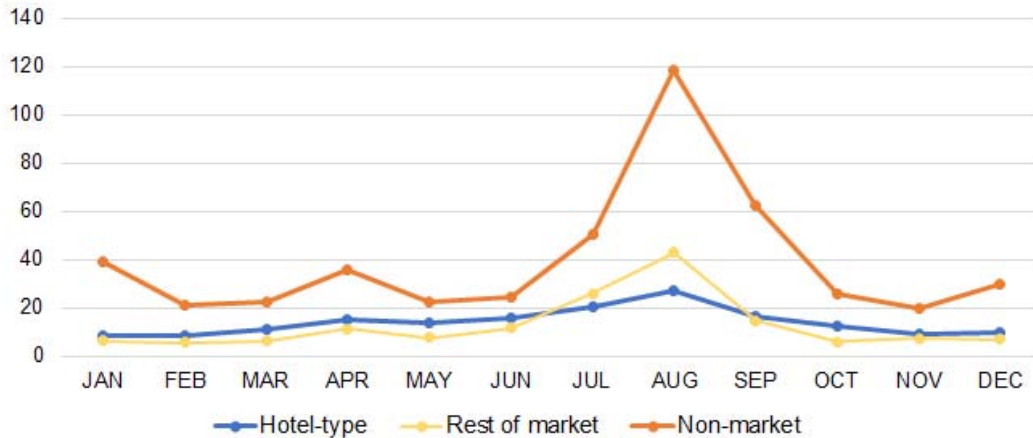


In resident tourism, family housing prevails

Resident tourists, meanwhile, travelled mainly within Spain (almost 90% of all trips by residents were made within Spain). They stayed to a greater extent in the houses of family or friends (42.0%), followed by hotel accommodations (20.9%), owned vacation houses (20.3%) and rental houses (8.1%), according to the Residents Travel Survey.

August was the month with the highest number of overnight stays in all types of accommodations (25.0% of the total took place this month), with a significant increase in stays at non-market accommodations (houses of family or friends, owned vacation houses and other non-market accommodations). 77.7% of overnight stays by residents in non-market accommodations took place in August.

Overnight stays of residents by type of accommodation 2019 (millions)



For personal reasons and in their own vehicles

Travel for personal reasons (except business and professional reasons) accounts for 91.7% of the total. Among these, leisure, recreation and holidays predominate (56.4%), followed by visits to family or friends (37.6%).

Three out of every four trips were made in personal vehicles (75.6%), followed by air travel (11.6%). Rail and bus had a similar weight (5.2%), while only 1.1% of resident trips used sea transport.

How much do we spend?

The spending of residents on trips within Spain was estimated at 32.0 billion euros in 2019, or 184.2 euros per person. The average daily expenditure was 49.3 euros and the average trip duration was 3.7 days. In terms of total expenditure, the highest value was in August, coinciding with the longest average duration of travel (7.14 days) and the highest average expenditure per person (270.6 euros). However, the highest average daily expenditure per person was recorded in May, June and November (61.5).

The total expenditure of resident tourists on their trips abroad is estimated at 16.1 billion. That comes to 797.8 euros per person, with an average daily expenditure of 111.2 euros. The average duration in this case is 7.2 days. The largest number of trips abroad were made in August and April. Europe (not including Spain) is our main destination when we travel abroad, and within Europe, France, Italy and Portugal are the top destinations. In France and Portugal, trips with an average duration of 1 to 3 nights predominate, while in Italy most trips were 4 to 7 nights.



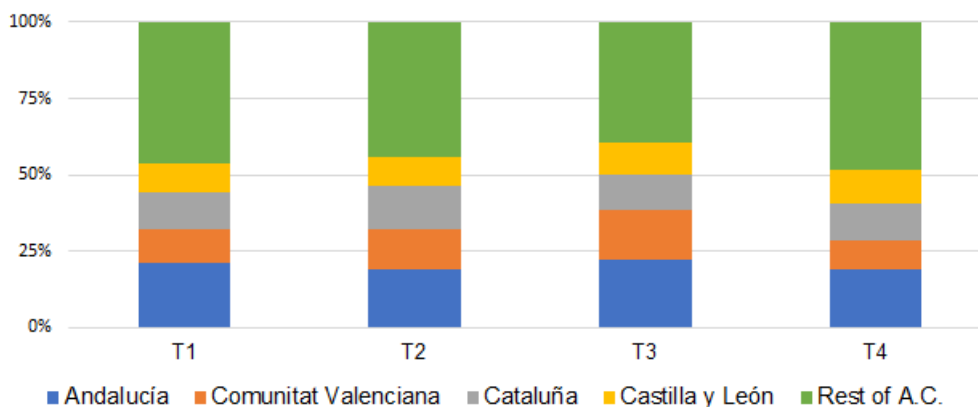
Andalucía, main destination

In 2019, almost half of all overnight stays by resident tourists in Spain were concentrated in three autonomous communities: Andalucía (20.8%), Comunitat Valenciana (13.8%) and Cataluña (12.1%). With a slightly lower weight was Castilla y León (10.2%).

For their part, the Autonomous Communities with the fewest overnight stays by residents were La Rioja (0.8%), Comunidad Foral de Navarra (1.3%), Illes Balears and País Vasco (both with 2.3% of the total).

Andalucía remained the travel destination of choice among autonomous communities (16.9% of trips) and Cataluña rose one place to become the second most popular destination (13.0%).

Overnight stays of residents by Autonomous Community. 2019



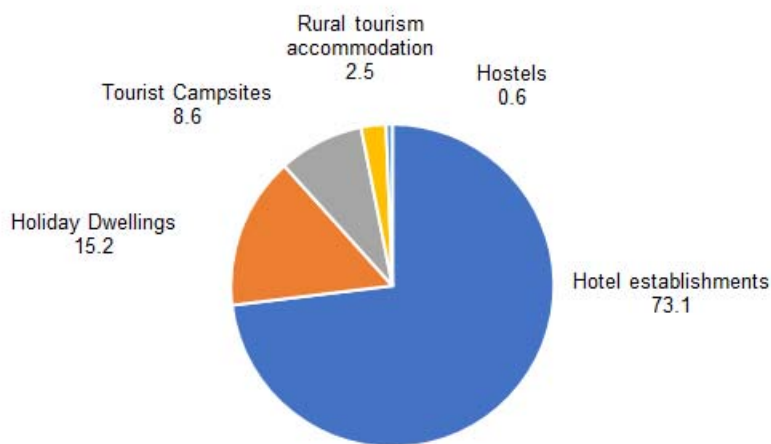


More non-resident tourism in apartments and hotels, less in rural tourism accommodations

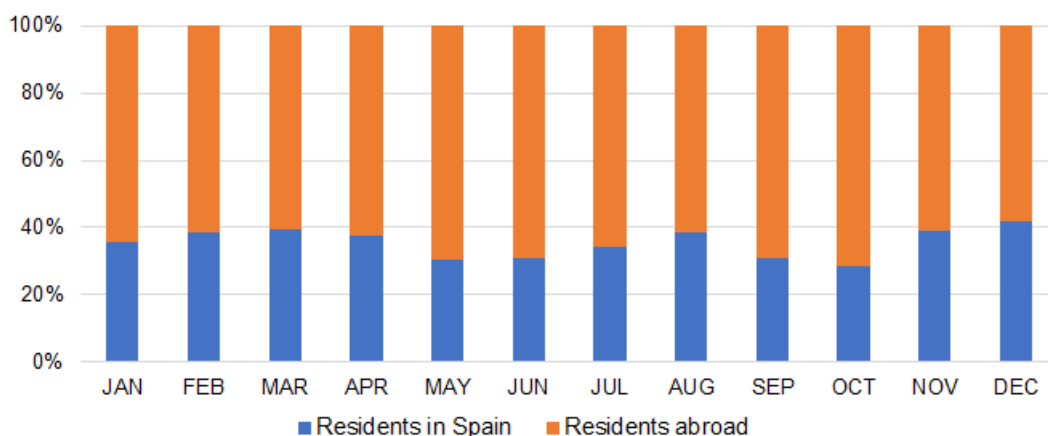
As far as market tourist accommodations go, hotels concentrated the majority of overnight stays (73.1% of the total), followed by tourist apartments (15.2), campsites (8.6%) and other accommodations.

Overnight stays by non-residents predominate in hotels and apartments (65.2% and 73.1%, respectively). Conversely, the weight of residents is greater in the rest of the accommodations, although this varies throughout the year, especially in campsites, where the influx of residents increases between the months of April and September.

Overnight stays in tourist accommodations. 2019 (%)



Overnight hotels stays by traveller residence. 2019





More overnight stays by residents in most provinces

Despite the preference for non-market accommodations among residents (42.0% stayed in the houses of family or friends, and 20.3% in owned vacation houses), residents outweighed non-residents in most of the peninsular provinces in terms of annual overnight hotel stays. Here, the main destinations for residents were Madrid, Alicante and Barcelona.

On the other hand, overnight hotel stays by non-resident tourists prevailed over those by residents in ten provinces, with Illes Balears, Las Palmas and Barcelona being the main destinations.

Predominant hotel stays in each province according to the traveller's residence. 2019

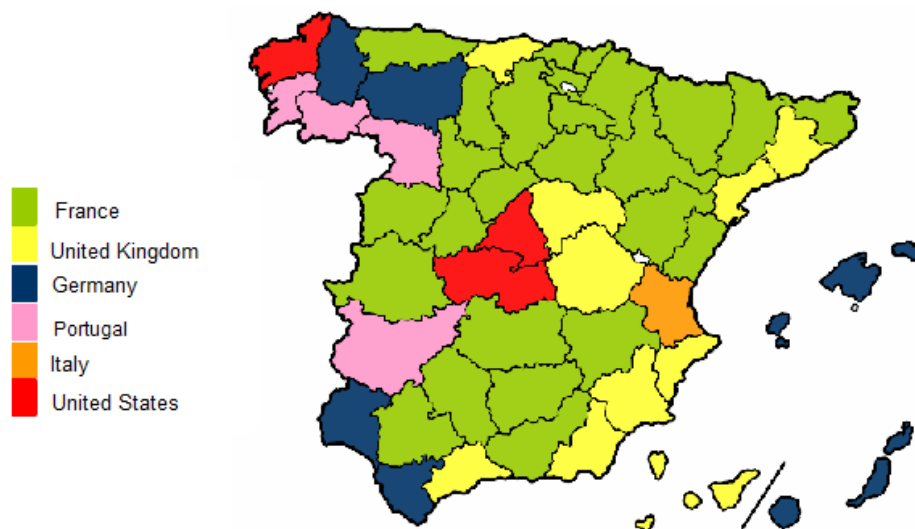


■ Provinces where non-resident overnight stays exceed resident overnight stays

By country of residence, the disaggregated overnight hotel stay data from 2018 reveals that travellers from European countries predominated in almost all provinces, except in Ceuta and Melilla, where travellers were from African countries, and in A Coruña, Madrid and Toledo, where travellers were predominantly from the United States.

Among tourists from different countries, it was the French who registered the most overnight stays in the peninsular provinces. The British accounted for 25.3% of all overnight stays in 2019. Furthermore, in 2018 they were the predominant non-residents in 10 provinces, the second in 20 and the third in 14.

Main overnight hotel stays by non-residents, by country of residence. 2018



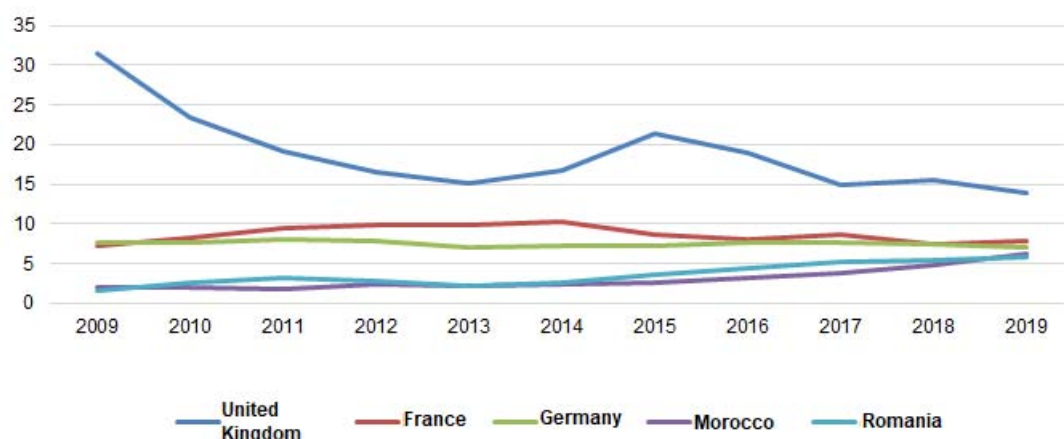
Tourists and home buyers

The predominant weight of British tourists is also seen in the fact that they have bought the most houses, according data collected by the Real Estate Registry Statistics. They are followed by the French, the Germans and the Moroccans. The latter were in fourth place in 2019, following a sustained rise in recent years.

The strong British presence in housing purchases in Spain is related to the high percentage of non-resident tourists who visit us and whose main accommodation is a family houses or an owned vacation property (11.2% and 5.9%, respectively).

In recent years there has been a change in trend in housing purchases by foreigners (although not only by the British) that can in part be explained by uncertainty on the part of the main buyers regarding the future relationship with the EU.

Main nationalities of foreign home buyers in Spain (% of total for each year)



Source: Real Estate Registry Statistics. Yearbook 2019

In which provinces did non-residents concentrate their preferences?

The provincial and nationality analysis of overnight hotel stays during 2018 allows us to see preferred areas according to nationality.

Based on this classification, the island provinces are once again most frequently repeated as top destinations among Europeans, with the exception of the French, who choose the Catalan provinces closest to the border (Girona and Barcelona). Among the peninsular provinces chosen by Europeans, Malaga also stands out as the second favourite destination among the Irish.

On the other hand, large cities (Madrid and Barcelona) were the main attractor among non-Europeans (Americans and Japanese), while Russians opted to a greater extent for two Catalan coastal provinces (Tarragona and Barcelona).

Higher provincial hotel stays according to the traveller's country. 2018

Traveler's country	Destination 1	Destination 2
Germany	Illes Balears	Las Palmas
Austria	Illes Balears	Las Palmas
Belgium	Sta. Cruz de Tenerife	Las Palmas
Denmark	Illes Balears	Las Palmas
United States	Barcelona	Madrid
Finland	Las Palmas	Sta. Cruz de Tenerife
France	Girona	Barcelona
Greece	Barcelona	Madrid
Ireland	Las Palmas	Málaga
Italy	Illes Balears	Barcelona
Japan	Barcelona	Madrid
Luxembourg	Illes Balears	Las Palmas
Norway	Las Palmas	Illes Balears
Netherlands	Illes Balears	Las Palmas
Poland	Las Palmas	Illes Balears
Portugal	Illes Balears	Madrid
United States	Illes Balears	Las Palmas
Czechia	Illes Balears	Barcelona
Russia	Tarragona	Barcelona
Sweden	Illes Balears	Las Palmas
Switzerland	Illes Balears	Las Palmas

