

SURVEY ON HOST TOURIST ESTABLISHMENTS, DECEMBER 2018

The balance for 2018 closed with a rise in visitor numbers of 4.4% and a rise in overnight stays of 7.2%

In December 2018, overnight stays in hotel establishments in the Basque Country were up by 7.0%

The 2018 annual balance for hotel establishments registered a 4.4% rise in visitor numbers and an increase of 7.2% in overnight stays in the Basque Country compared to the previous year. Thus, in 2018, there were 3,071,130 visitors, 130,637 more than the previous year, according to Eustat data.

In December 2018, there were 203,662 visitors registered in the hotel establishments of the Basque Country, 10,155 up on the same month of the previous year, which is an increase of 5.2%. Visitor numbers increased in the three provinces: in Gipuzkoa by 8.1%, in Bizkaia by 4.6% and in Álava by 0.6%.

Furthermore, overnight stays registered in hotel establishments of the Basque Country in December 2018 reached 381,581, which was an increase of 7.0% on those registered in December of the previous year, that is, there were 25,014 more overnight stays. There was also a positive year-on-year variation in overnight stays in the three provinces: in Gipuzkoa they increased by 7.9%, in Álava by 6.7% and in Bizkaia they were up by 6.4%.

Overnight stays, visitor numbers, average stay and bed occupancy rates in hotel establishments in the Basque Country. December 2018

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness by rooms	
	12/2018	m/m-12 (%)	12/2018	m/m-12 (%)	12/2018	12/2017	by places		by rooms		ADR (euro)	RevPar (euro)
							12/2018	p.p.*	12/2018	p.p.*		
BASQUE COUNTRY	381.581	7,0	203.662	5,2	1,87	1,84	44,5	2,1	51,9	2,2	75,5	39,2
State	273.065	6,5	146.388	5,0	1,87	1,84	-	-	-	-	-	-
Foreigners	108.516	8,4	57.274	6,0	1,89	1,85	-	-	-	-	-	-
ARABA/ÁLAVA	53.803	6,7	29.056	0,6	1,85	1,75	41,6	2,7	49,4	2,8	64,8	32,0
State	44.599	8,1	23.990	3,3	1,86	1,78	-	-	-	-	-	-
Extranjeros	9.204	0,7	5.066	-10,3	1,82	1,62	-	-	-	-	-	-
Vitoria-Gasteiz	41.299	9,4	21.660	1,1	1,91	1,76	44,0	2,7	53,6	2,9	56,9	30,5
BIZKAIA	189.591	6,4	100.643	4,6	1,88	1,85	46,6	2,6	53,9	1,4	72,9	39,3
State	137.544	5,6	74.887	4,7	1,84	1,82	-	-	-	-	-	-
Foreigners	52.047	8,6	25.756	4,3	2,02	1,94	-	-	-	-	-	-
Bilbao	126.408	4,2	67.666	5,5	1,87	1,89	51,9	1,4	59,2	0,1	78,7	46,6
GIPUZKOA	138.187	7,9	73.963	8,1	1,87	1,87	42,9	1,3	50,3	3,0	83,4	41,9
State	90.922	7,0	47.511	6,3	1,91	1,90	-	-	-	-	-	-
Foreigners	47.265	9,9	26.452	11,7	1,79	1,82	-	-	-	-	-	-
Donostia / San Sebastián	86.297	11,7	47.256	14,2	1,83	1,87	47,5	1,5	53,0	1,4	101,4	53,8

p.p.*= difference in percentage points on the same month of the previous year

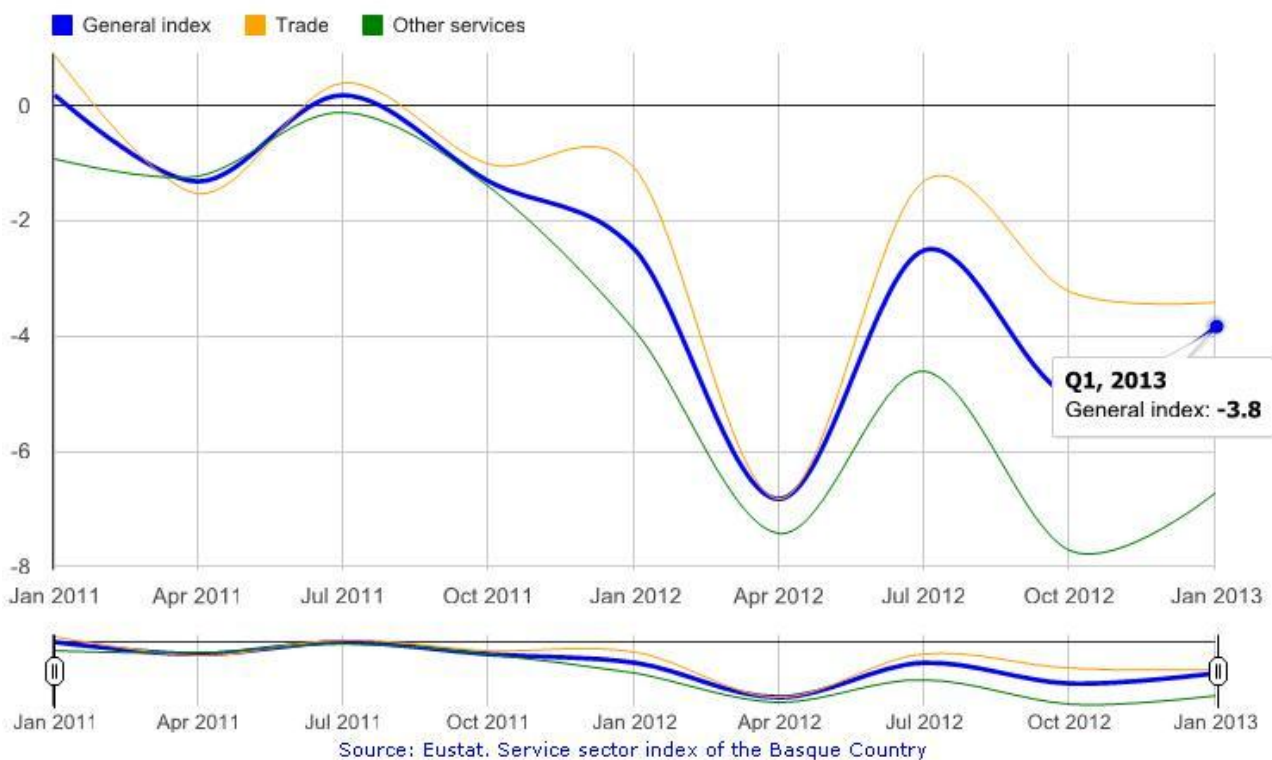
Source: Eustat. Survey on tourist establishments

The number of visitors from within Spain rose by 5.0% in the Basque Country compared to December of the previous year, whilst the number of visitors from abroad rose by 6.0%. Álava registered a 3.3% increase in visitors from within Spain, and a 10.3% drop in visitors from abroad. In Bizkaia, the number of Spanish visitors was up by 4.7%, while the number of visitors from abroad rose by 4.3%. In Gipuzkoa there was a 6.3% increase in visitors from within Spain, and a rise of 11.7% in those from abroad.

The average length of stay was 1.87 days last December, an improvement upon the 1.84 days average length of stay that was registered in December 2017. In Álava there was an increase from 1.75 days last year to 1.85 days in December 2018; in Bizkaia the average length of stay rose from 1.85 days in December 2017 to 1.88 days this December; and for its part, Gipuzkoa repeated the figures for December 2017, with an average length of stay of 1.87 days.

There was an increase of 2.1 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 42.3% in December 2017 to 44.5% in December 2018. Álava experienced a rise of 2.7 percentage points, going from an occupancy rate of 39.0% in December 2017 to a rate of 41.6% in December 2018. Bizkaia saw an increase of 2.6 percentage points, going from a bed occupancy rate of 44.0% in December 2017 to a rate of 46.6% in December 2018. In Gipuzkoa the occupancy rate fell 1.3 percentage points, from the 41.6% achieved in December 2017 to 42.9% in December 2018.

Year-on-year variation rate of the service sector index in the Basque Country. (%)
Corrected for calendar effects. Current prices



The occupancy rate per room also registered an upward trend, with a 2.2 percentage point increase for the Basque Country overall, where it stood at 51.9%. In Álava it was up by 2.8 percentage points, standing at 49.4%; in Bizkaia it increased by 1.4 percentage points to reach 53.9%; whereas in Gipuzkoa it rose by 3.0 percentage points, standing at 50.3% occupancy per room.

The highest hotel bed occupancy rate in December 2018 was in Bilbao (51.9%), followed by San Sebastián (47.5%) and Vitoria-Gasteiz (44.0%).

Taking into account the day of the week, at weekends there was a higher occupancy in the Basque Country as a whole in December 2018, with 56.4% of places occupied, whilst the registered occupancy stood at 39.5% on weekdays.

Finally, with regards to the **profitability indicators of the sector**, the average daily rate (ADR) of hotels in the Basque Country stood at 75.5 euros in December 2018, 1.9% up on the year before. The average rate stood at 64.8 euros in Álava, down 0.8%; 72.9 euros in Bizkaia, with an increase of 1.7%, and 83.4 euros in Gipuzkoa, where it rose 2.6%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 39.2 euros in December 2018, a 6.5% increase on December 2017. The RevPAR stood at 32.0 euros in Álava, 39.3 euros in Bizkaia, and 41.9 euros in Gipuzkoa.

The occupancy rate per room during the Immaculate Conception Bank Holiday was 65.9% in the hotel establishments in the Basque Country

In the Basque Country as a whole there were 35,995 visitors and 72,495 overnight stays during the 2018 Immaculate Conception Bank Holiday, over the dates of 5 to 8 December 2018 (4 nights), with an occupancy rate per bed of 61.5% and per room of 65.9%. In Álava there were 5,230 visitors and 10,738 overnight stays in the four given days and bed and room occupancy rates reached 61.4% and 66.0% respectively. In Bizkaia there were 16,980 visitors and 34,027 overnight stays, with a room occupancy rate of 62.3% and a bed occupancy rate of 66.9%. In Gipuzkoa there were 13,785 visitors and 27,730 overnight stays, with a room occupancy rate of 60.7% and a bed occupancy rate of 64.6%.

2018 annual balance for hotel establishments: over 3,000,000 visitors

In 2018 there were 3,071,130 visitors, that is, 130,637 more than the previous year, with a 4.4% increase in visitor numbers. Visitor numbers increased by 7.1% in Gipuzkoa, 3.5% in Bizkaia and 0.8% in Álava.

Overnight stays in 2018 stood at 6,040,523, that is, 404,811 overnight stays up on the previous year, or 7.2% more. Overnight stays were up by 4.4% in Álava, by 6.1% in Bizkaia and by 9.5% in Gipuzkoa.

The average length of stay rose, going from 1.92 days in 2017 to 1.97 days in 2018 in the Basque Country, whilst the bed occupancy rate was up by 2.6 percentage points, standing at 56.8% for the Basque Country as a whole.

Finally, with regards to the **profitability indicators of the sector**, the average daily rate (ADR) of hotels in the Basque Country stood at 90.5 euros in 2018, 6.2% up on the year before. The average rate stood at 71.7 euros in Álava, where it rose by 0.9%; 83.5 euros in Bizkaia, with an increase of 9.7%, and 105.8 euros in Gipuzkoa, where it rose 3.6%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 61.1 euros in 2018, a 9.6% increase on 2017. The RevPAR stood at 44.4 euros in Álava, 57.7 euros in Bizkaia, and 71.7 euros in Gipuzkoa.

Overnight stays, visitor numbers, average stay and bed occupancy rates in hotel establishments in the Basque Country. 2018

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Rentabilidad por Habitación	
	2018	2018/2017 (%)	2018	2018/2017 (%)	2018	2017	by places		by rooms		ADR (euros)	RevPar (euros)
							2018	p.p.*	2018	p.p.*		
BASQUE COUNTRY	6.040.523	7,2	3.071.130	4,4	1,97	1,92	56,8	2,6	67,5	2,1	90,5	61,1
ARABA/ÁLAVA	792.338	4,4	431.035	0,8	1,84	1,78	51,2	2,4	62,0	3,3	71,7	44,4
BIZKAIA	2.857.810	6,1	1.463.341	3,5	1,95	1,90	57,0	2,4	69,0	1,0	83,5	57,7
GIPUZKOA	2.390.375	9,5	1.176.754	7,1	2,03	1,99	58,7	2,9	67,8	2,9	105,8	71,7

p.p.*= difference in percentage points on the previous year
 Source: Eustat. Survey on tourist establishments

In rural accommodation, visitor numbers increased by 3.4%, but overnight stays fell by 1.5% in December

There were 11,670 visitors to rural accommodation in the Basque Country, 3.4% more than the same month of the previous year. By province, in Álava the number of visitors was down by 23.2%, in Bizkaia there was a drop of 4.0%, but in Gipuzkoa there was an increase of 42.9%.

The 1,089 visitors originating from abroad signified a rise of 118.2% with regards to those received a year ago and represented 9.3% of the total number of visitors. For its part, the number of visitors from within Spain fell by 1.9%.

Rural tourism establishments and country cottages in the Basque Country recorded a total of 28,272 overnight stays in December, with a decrease of 1.5% with respect to the same month of the previous year. By province, in Álava they were down 13.2% and in Gipuzkoa they fell by 11.8%, however in Bizkaia they were up 28.3%.

The bed occupancy rate stood at 23.3% with a fall of 0.4 percentage points from the figures obtained in December 2017. In Álava it decreased by 3.6 percentage points, standing at 18.3%. In Bizkaia the occupancy rate was 26.9%, with an increase of 5.7 percentage points in relation to December 2017, and Gipuzkoa saw a fall of 2.6 percentage points to reach an occupancy rate this December of 23.5%.

Finally, the average length of stay per visitor decreased this December, going from 2.54 days a year ago to 2.42 this last month.

Overnight stays, visitor numbers, average stay and occupancy rates in rural accommodation in the Basque Country. December 2018

	Overnight stays		Visitors		Average length		Degree of occupation by places (%)	
	12/2018	m/m-12 (%)	12/2018	m/m-12 (%)	12/2018	12/2017	12/2018	p.p.*
BASQUE COUNTRY	28.272	-1,5	11.670	3,4	2,42	2,54	23,3	-0,4
Araba/Álava	5.264	-13,2	2.262	-23,2	2,33	2,06	18,3	-3,6
Bizkaia	9.742	28,3	4.268	42,9	2,28	2,54	26,9	5,7
Gipuzkoa	13.266	-11,8	5.140	-4,0	2,58	2,81	23,5	-2,6

p.p.*= difference in percentage points on the same month of the previous year
 Source: Eustat. Survey on tourist establishments

2018 annual balance for rural tourism: visitor numbers were up 7.2% and overnight stays rose by 9.0%

There were 172,486 visitors to rural tourism establishments in the Basque Country throughout 2018, which was 7.2% up on the previous year, whilst overnight stays stood at 450,172, 9.0% up on 2017.

Visitor numbers were down 5.6% in Álava, but were up 14.4% in Bizkaia and rose by 8.2% in Gipuzkoa. Overnight stays were also down 1.3% in Álava, but were up 16.9% in Bizkaia and 8.0% in Gipuzkoa.

The average stay per visitor rose from 2.57 days in 2017 to 2.61 days in 2018. The bed occupancy rate increased by 2.2 percentage points to 29.5% in 2018.

Overnight stays, visitor numbers, average stay and occupancy rates in rural accommodation in the Basque Country. 2018

	Overnight stays		Visitors		Average length		Degree of occupation (%)			
	2018	2018/2017 (%)	2018	2018/2017 (%)	2018	2017	by places		by rooms	
							2018	p.p.*	2018	p.p.*
BASQUE COUNTRY	450.172	9,0	172.486	7,2	2,61	2,57	29,5	2,2	32,4	3,6
ARABA/ÁLAVA	68.560	-1,3	30.294	-5,6	2,26	2,16	20,4	-0,7	22,56	0,7
BIZKAIA	138.956	16,9	53.380	14,4	2,60	2,55	29,7	3,5	32,76	4,6
GIPUZKOA	242.656	8,0	88.812	8,2	2,73	2,74	33,7	2,7	37,01	4,4

p.p.*= difference in percentage points on the previous year

Source: Eustat. Survey on tourist establishments

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