

## SURVEY ON TOURIST ESTABLISHMENTS. DECEMBER 2017

## The balance for 2017 closed with a rise in visitor numbers of 3.6% and a rise in overnight stays of 2.6%

***In December 2017, visitors to hotel establishments in the Basque Country were up by 3.0%***

The 2017 annual balance for hotel establishments registered a 3.6% rise in visitor numbers and an increase of 2.6% in overnight stays in the Basque Country compared to the previous year. Thus, in 2017, there were 2,940,493 visitors, 103,268 more than the previous year, according to Eustat data.

In December 2017, there were 193,507 visitors registered in the hotel establishments of the Basque Country in December 193,507, 5,687 up on the same month of the previous year, which is an increase of 3.0%. The number of visitors rose by 8.6% in Bizkaia, but was down by 0.7% in Álava and 2.4% in Gipuzkoa.

Furthermore, overnight stays registered in hotel establishments of the Basque Country in December 2017 reached 356,567, which was an increase of 4.0% on those registered in December of the previous year, that is, there were 13,685 more overnight stays. There was a positive year-on-year change in terms of overnight stays in Bizkaia, where they were up 9.4%, but in Álava they dropped 1.9% and in Gipuzkoa they were down by 0.5%.

**Table 1.- Overnight stays, visitor numbers, average stay and bed occupancy rates in hotel establishments in the Basque Country. December 2017**

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness	
	12/2017	m/m-12 (%)	12/2017	m/m-12 (%)	12/2017	12/2016	by places		by rooms		ADR (euro)	RevPar (euro)
							12/2017	p.p.*	12/2017	p.p.*		
<b>BASQUE COUNTRY</b>	<b>356.567</b>	<b>4,0</b>	<b>193.507</b>	<b>3,0</b>	<b>1,84</b>	<b>1,83</b>	<b>42,3</b>	<b>1,4</b>	<b>49,7</b>	<b>1,2</b>	<b>74,1</b>	<b>36,8</b>
State	256.478	3,7	139.479	1,9	1,84	1,81	-	-	-	-	-	-
Foreigners	100.089	4,9	54.028	6,0	1,85	1,87	-	-	-	-	-	-
<b>ARABA/ÁLAVA</b>	<b>50.418</b>	<b>-1,9</b>	<b>28.869</b>	<b>-0,7</b>	<b>1,75</b>	<b>1,77</b>	<b>39,0</b>	<b>1,2</b>	<b>46,6</b>	<b>1,5</b>	<b>65,4</b>	<b>30,5</b>
State	41.276	-3,7	23.219	-5,6	1,78	1,74	-	-	-	-	-	-
Extranjeros	9.142	7,3	5.650	25,8	1,62	1,90	-	-	-	-	-	-
Vitoria-Gasteiz	37.744	-4,2	21.427	-3,1	1,76	1,78	41,3	1,0	50,8	1,0	56,6	28,7
<b>BIZKAIA</b>	<b>178.137</b>	<b>9,4</b>	<b>96.245</b>	<b>8,6</b>	<b>1,85</b>	<b>1,84</b>	<b>44,0</b>	<b>3,7</b>	<b>52,5</b>	<b>3,4</b>	<b>71,7</b>	<b>37,6</b>
State	130.196	11,2	71.548	8,8	1,82	1,78	-	-	-	-	-	-
Foreigners	47.941	4,8	24.697	8,1	1,94	2,00	-	-	-	-	-	-
Bilbao	121.289	5,8	64.164	3,3	1,89	1,85	50,5	3,2	59,0	2,5	76,3	45,1
<b>GIPUZKOA</b>	<b>128.012</b>	<b>-0,5</b>	<b>68.393</b>	<b>-2,4</b>	<b>1,87</b>	<b>1,83</b>	<b>41,6</b>	<b>-1,7</b>	<b>47,3</b>	<b>-2,0</b>	<b>81,3</b>	<b>38,4</b>
State	85.006	-2,8	44.712	-3,8	1,90	1,88	-	-	-	-	-	-
Foreigners	43.006	4,5	23.681	0,3	1,82	1,74	-	-	-	-	-	-
Donostia / San Sebastián	77.236	-5,5	41.363	-5,7	1,87	1,86	46,0	-4,5	51,6	-5,0	97,0	50,0

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

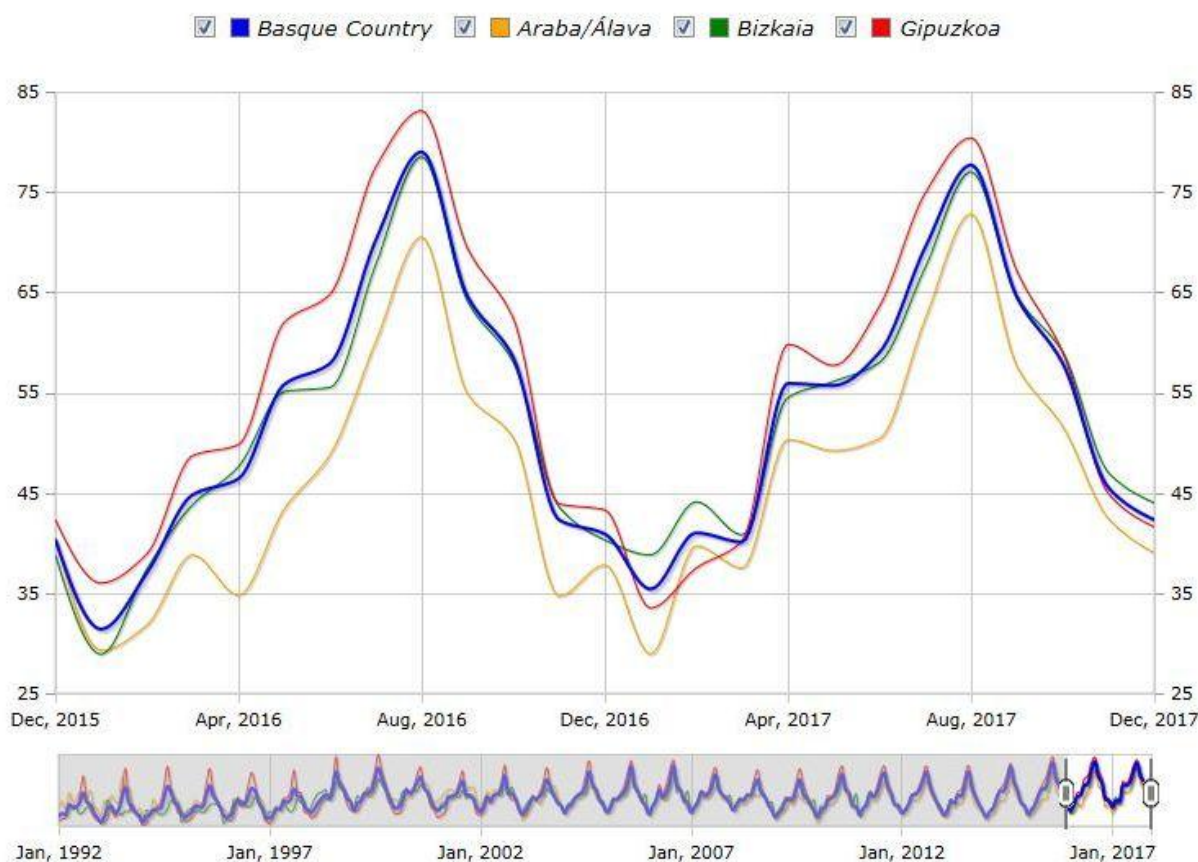
Source: Eustat. Survey on tourist establishments

The number of visitors from within Spain rose by 1.9% 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 5.6% decrease in visitors from Spain, and a 25.8% increase in foreign visitors. In Bizkaia the number of Spanish visitors was up by 8.8%, whereas the number of visitors from abroad rose by 8.1%. In Gipuzkoa there was a 0.3% increase in foreign visitor numbers, but the number of Spanish visitors fell by 3.8%.

The average length of stay was 1.84 days last December, an improvement upon the 1.83 days average length of stay that was registered in December 2016. In Álava there was a drop from 1.77 days last year to 1.75 days in December 2017; in Bizkaia it rose from 1.84 days in December 2016 to 1.85 days in December 2017; and for its part, the average length of stay in Gipuzkoa rose from 1.83 days in December 2016 to 1.87 days in December 2017.

There was an increase of 1.4 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 40.9% in December 2016 to 42.3% in December 2017. Álava experienced a rise of 1.2 percentage points, going from an occupancy rate of 37.8% in December 2016 to a rate of 39.0% in December 2017. Bizkaia saw an increase of 3.7 percentage points, going from a bed occupancy rate of 40.3% in December 2016 to a rate of 44.0% in December 2017. In Gipuzkoa the occupancy rate fell 1.7 percentage points, from the 43.3% achieved in December 2016 to 41.6% in December 2017.

### Evolution of the bed occupancy rate of the hotel establishments of the Basque Country by province (%)



Source: Eustat. Survey on tourist establishments

The occupancy rate per room also registered an upward trend, with a 1.2 percentage point increase for the Basque Country overall, where it stood at 49.7%. In Álava it was up by 1.5 percentage points, standing at 46.6%; in Bizkaia it increased by 3.4 percentage points, reaching 52.5%. Meanwhile, in Gipuzkoa there was a drop of 2.0 percentage points, registering 47.3% occupancy per room.

The highest hotel bed occupancy rate in December 2017 was in Bilbao (50.5%), followed by Donostia/San Sebastián (46.0%) and Gipuzkoa Costa (43.1%).

Taking into account the day of the week, at weekends there was a higher occupancy in the Basque Country as a whole in December 2017, with 49.7% of places occupied, whilst the registered occupancy stood at 38.8% 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 74.1 euros in December 2017, 5.4% up on the year before. The average rate stood at 65.4 euros in Álava, where it rose by 1.1%; 71.7 euros in Bizkaia, with an increase of 7.7%, and 81.3 euros in Gipuzkoa, where it rose 4.6%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 36.8 euros in December 2017, a 7.9% increase on December 2016. The RevPAR stood at 30.5 euros in Álava, 37.6 euros in Bizkaia, and 38.4 euros in Gipuzkoa.

### ***2017 annual balance for hotel establishments: over 100,000 more visitors***

In 2017 there were 2,940,493 visitors, 103,268 more than the previous year, with a 3.6% increase in visitor numbers. The number of visitors increased by 6.3% in Álava, 5.4% in Bizkaia and 0.5% in Gipuzkoa.

Overnight stays in 2017 stood at 5,635,712, that is, 145,213 overnight stays up on the previous year, or 2.6% more. Overnight stays were up by 3.2% in Álava, by 4.6% in Bizkaia and by 0.1% in Gipuzkoa.

The average length of stay fell, going from 1.94 days in 2016 to 1.92 days in 2017 in the Basque Country, whilst the bed occupancy rate was up by 1.2 percentage points, standing at 54.2% 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 85.2 euros in 2017, 5.0% up on the year before. The average rate stood at 71.1 euros in Álava, where it rose by 4.4%; 76.1 euros in Bizkaia, with an increase of 6.3%, and 102.1 euros in Gipuzkoa, where it rose 4.3%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 55.8 euros in 2017, a 6.8% increase on 2016. The RevPAR stood at 41.6 euros in Álava, 51.8 euros in Bizkaia, and 66.2 euros in Gipuzkoa.

**Table 2.- Overnight stays, visitor numbers, average stay and bed occupancy rates in hotel establishments in the Basque Country. 2017**

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness by rooms	
	2017	2017/2016 (%)	2017	2017/2016 (%)	2017	2016	by places		by rooms		ADR (euro)	RevPar (euro)
							2017	p.p.*	2017	p.p.*		
<b>BASQUE COUNTRY</b>	<b>5.635.712</b>	<b>2,6</b>	<b>2.940.493</b>	<b>3,6</b>	<b>1,92</b>	<b>1,94</b>	<b>54,2</b>	<b>1,2</b>	<b>65,4</b>	<b>1,1</b>	<b>85,2</b>	<b>55,8</b>
ARABA/ÁLAVA	759.243	3,2	427.508	6,3	1,78	1,83	48,8	3,9	58,6	1,9	71,1	41,6
BIZKAIA	2.693.894	4,6	1.414.460	5,4	1,90	1,92	54,6	2,4	68,0	2,7	76,1	51,8
GIPUZKOA	2.182.575	0,1	1.098.525	0,5	1,99	1,99	55,8	-1,6	64,9	-1,4	102,1	66,2

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

Source: Eustat. Survey on tourist establishments

***In rural accommodation, visitor numbers increased by 19.8% and overnight stays rose by 24.0% in December***

There were 11,285 visitors to rural accommodation in the Basque Country, 19.8% more than the same month of the previous year. By province, in Álava the number of visitors was up by 5.7%, in Bizkaia there was an increase of 16.5%, and in Gipuzkoa there was an increase of 31.5%.

The 499 visitors originating from abroad signified a rise of 9.2% with regards to those received a year ago and represented 4.4% of the total number of visitors. For its part, the number of visitors from within Spain rose by 20.3%.

Rural tourism establishments and country cottages in the Basque Country recorded a total of 28,698 overnight stays in December, with an increase of 24.0% with respect to the same month of the previous year. By province, in Álava they were up by 8.2%, in Bizkaia 4.0% and in Gipuzkoa 47.1%.

The bed occupancy rate stood at 23.7% with a rise of 4.0 percentage points from the figures obtained in December 2016. In Álava it increased by 0.4 percentage points, standing at 21.9%. In Bizkaia the occupancy rate was 21.3%, with an increase of 0.3 percentage points in relation to December 2016, and Gipuzkoa was up 7.9 percentage points to reach an occupancy rate of 26.1% in December 2017.

Finally, the average length of stay per visitor increased this December, going from 2.46 days a year ago to 2.54 this last month.

**Table 3.- Overnight stays, visitor numbers, average stay and occupancy rates in rural accommodation in the Basque Country. December 2017**

	Overnight stays		Visitors		Average length		Degree of occupation by places (%)	
	12/2017	m/m-12 (%)	12/2017	m/m-12 (%)	12/2017	12/2016	12/2017	p.p.*
<b>BASQUE COUNTRY</b>	<b>28.698</b>	<b>24,0</b>	<b>11.285</b>	<b>19,8</b>	<b>2,54</b>	<b>2,46</b>	<b>23,7</b>	<b>4,0</b>
Araba/Álava	6.065	8,2	2.944	5,7	2,06	2,01	21,9	0,4
Bizkaia	7.595	4,0	2.987	16,5	2,54	2,85	21,3	0,3
Gipuzkoa	15.038	47,1	5.354	31,5	2,81	2,51	26,1	7,9

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

**Source: Eustat. Survey on tourist establishments**

**2017 annual balance for rural tourism: visitor numbers rose by 4.9% and overnight stays rose by 3.0%**

There were 160,847 visitors to rural tourism establishments in the Basque Country in 2017, which was 4.9% up on the previous year, whilst overnight stays stood at 412,882, 3.0% up on 2016.

Visitor numbers increased in the three provinces: in Álava they rose by 6.2%, in Bizkaia they were up 1.7% and in Gipuzkoa they rose by 6.3%. Overnight stays also rose in the three provinces: by 0.7% in Álava, 0.1% in Bizkaia and 5.4% in Gipuzkoa.

The average stay per visitor fell from 2.61 days in 2016 to 2.57 days in 2017. The bed occupancy rate fell slightly, by one tenth of a percentage point, standing at 27.3% in 2017.

**Table 4.- Overnight stays, visitor numbers, average stay and occupancy rates in rural accommodation in the Basque Country. 2017**

	Overnight stays		Visitors		Average length		Degree of occupation (%)			
	2017	2017/2016 (%)	2017	2017/2016 (%)	2017	2016	by places		by rooms	
							2017	p.p.*	2017	p.p.*
<b>BASQUE COUNTRY</b>	<b>412.882</b>	<b>3,0</b>	<b>160.847</b>	<b>4,9</b>	<b>2,57</b>	<b>2,61</b>	<b>27,3</b>	<b>-0,1</b>	<b>28,82</b>	<b>-0,4</b>
ARABA/ÁLAVA	69.454	0,7	32.102	6,2	2,16	2,28	21,1	-0,5	21,88	-1,3
BIZKAIA	118.821	0,1	46.657	1,7	2,55	2,59	26,1	-0,9	28,17	-1,0
GIPUZKOA	224.607	5,4	82.088	6,3	2,74	2,76	30,9	0,6	32,61	0,5

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

**Source: Eustat. Survey on tourist establishments**

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