

SURVEY ON TOURIST ESTABLISHMENTS. HOTELS AND RURAL ACCOMMODATION. JULY 2020

In the month of July 2020, half the number of overnight stays were recorded in the Basque Country compared to July of the previous year

The number of establishments that have maintained some activity has increased to 510, 138 more than in June, but less than the 581 in July 2019

The number of visitors at hotel establishments in the Basque Country in July 2020 stood at 179,843, equating to 340,376 overnight stays, compared to 328,082 visitors and 692,414 overnight stays during the same month of the previous year, i.e. 45.2% and 50.8% fewer in July 2020 than in July 2019, respectively, according to Eustat data. These data reveal the prolonged effect of the COVID-19 crisis on the hotel sector in the Basque Country.

Despite this, following the end of the state of alarm on 21 June and with the limitations and prior conditions established via the order of 9 May (SDN/399/2020) for the reopening to the public of hotels and tourist establishments, the activity of the sector progressively increased during the month of July.

In this context, in the Basque Country as a whole, establishments that have maintained some hotel activity went from 372 recorded in June to 510 in the month of July 2020 – still below the 581 recorded in July 2019. Establishments that closed for the entire month, on the other hand, decreased from 246 in June to 109 in July 2020, triple the number of those that were closed in the same month of the previous year, namely 33.

Hotel establishments that have been active and those that have remained closed. COVID19 period

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
	Active	Closed	Active	Closed	Active	Closed	Active	Closed
2020								
July	510	109	55	20	192	43	263	46
June	372	246	46	29	141	94	185	123
May	188	430	20	55	80	156	88	219
April	56	563	6	69	29	207	21	287
March	532	87	62	13	206	30	264	44
July 2019	581	33	68	7	223	11	290	15

Source: Eustat. Survey on tourist establishments

By province, the trend of progressive reopening was generalised, going in Álava from 46 establishments with activity in June 2020 to 55 in July 2020; in Bizkaia this went from 141 establishments with some activity in June to 192 in July and, finally, in Gipuzkoa the number of establishments with activity in July was 263, when in June there were 185. These figures are, in any case, lower than those observed in July 2019, when establishments with activity stood at 68 in Álava, 223 in Bizkaia and 290 in Gipuzkoa.

The effect of the crisis this July compared to the same month of the previous year was not even across all the three provinces. In Álava, visitor numbers were down by 47.1% and overnight stays by 51.3%, and in Bizkaia visitor numbers fell by 58.0% and overnight stays by 59.2%. On the other hand, in Gipuzkoa the year-on-year decrease was less pronounced, with a 29.3% decline in visitors and 42.0% decline in overnight stays.

Overnight stays, visitor numbers, average stay, bed occupancy rates and profitability in hotel establishments in the Basque Country. July 2020

	Overnight stays		Visitors		Average stay		Degree of occupation (%)				Profitability			
	07/2020	m/m-12 (%)	07/2020	m/m-12 (%)	07/2020	07/2019	by places		by rooms		ADR (euro)		RevPar (euro)	
							07/2020	p.p.*	07/2020	p.p.*	07/2020	m/m-12 (%)	07/2020	m/m-12 (%)
BASQUE COUNTRY	340.376	-50,8	179.843	-45,2	1,89	2,11	42,0	-29,1	48,3	-32,1	85,9	-22,35	41,5	-53,33
State	236.404	-31,8	119.524	-26,7	1,98	2,13	-	-	-	-	-	-	-	-
Foreigners	103.972	-69,9	60.319	-63,4	1,72	2,10	-	-	-	-	-	-	-	-
ARABA/ÁLAVA	40.275	-51,3	22.285	-47,1	1,81	1,96	36,9	-24,0	44,5	-27,2	68,1	-14,08	30,3	-46,67
State	31.907	-39,2	16.809	-33,2	1,90	2,09	-	-	-	-	-	-	-	-
Extranjeros	8.368	-72,2	5.476	-67,8	1,53	1,77	-	-	-	-	-	-	-	-
Vitoria-Gasteiz	27.179	-54,8	14.572	-49,4	1,87	2,09	37,3	-25,1	48,4	-29,4	58,8	-18,00	28,5	-48,99
BIZKAIA	127.211	-59,2	65.028	-58,0	1,96	2,01	36,1	-32,3	43,4	-35,5	70,8	-21,74	30,7	-56,95
State	96.783	-40,8	48.065	-39,8	2,01	2,05	-	-	-	-	-	-	-	-
Foreigners	30.428	-79,5	16.963	-77,4	1,79	1,97	-	-	-	-	-	-	-	-
Bilbao	70.856	-62,9	38.279	-60,8	1,85	1,96	34,3	-37,5	40,4	-41,6	73,2	-27,90	29,6	-64,49
GIPUZKOA	172.890	-42,0	92.530	-29,3	1,87	2,28	49,7	-28,3	54,4	-30,7	102,7	-28,00	55,9	-53,95
State	107.714	-17,6	54.650	-5,9	1,97	2,25	-	-	-	-	-	-	-	-
Foreigners	65.176	-61,1	37.880	-48,0	1,72	2,30	-	-	-	-	-	-	-	-
Donostia / San Sebastián	105.154	-39,7	55.768	-23,6	1,89	2,39	53,3	-31,9	55,8	-35,0	121,1	-35,96	67,6	-60,63

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

Source: Eustat. Survey on tourist establishments

Compared to the previous month, June 2020, both visitors and overnight stays increased considerably in the month of July, with the former going from 47,669 to 179,843 and the latter from 89,823 to 340,376. The revival of activity was observed in all three provinces. In Álava, the 8,151 visitors and 16,085 overnight stays registered in June 2020 increased to 22,285 visitors and 40,275 overnight stays in July. In Bizkaia, 20,201 visitors were observed in June 2020 compared to the 65,028 registered in July, with overnight stays rising from 38,406 to 127,211. Finally, in Gipuzkoa, visitors and overnight stays in July totalled 92,530 and 172,890, respectively, compared to the 19,317 and 35,332 observed in June.

In the month of July 2020, 119,524 visits by travellers from the rest of Spain were recorded throughout the Basque Country, compared to 60,319 from abroad; 26.7% and 63.4% less than in July 2019, respectively. Visitor numbers for those coming from abroad represented 33.5% of the total visitor numbers, whereas for the same month in 2019 this percentage rose to 50.3%.

This July the average length of stay was 1.89 days, below the average length of stay of 2.11 days registered in July 2019. In Álava there was a decrease from 1.96 days last year to 1.81 days in July of this year; in Bizkaia it fell from 2.01 days in July 2019 to 1.96 days in July 2020; in Gipuzkoa, for its part, the average length of stay fell from the 2.28 days obtained in July 2019 to the 1.87 days obtained this July.

There was a decrease of 29.1 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 71.1% in July 2019 to 42.0% in July this year. By province, bed occupancy rates stood at 36.9%, 36.1% and 49.7% for Álava, Bizkaia and Gipuzkoa, following year-on-year decreases of 24.0, 32.3 and 28.3 percentage points, respectively.

The revenue per available room fell by at least half in July 2020 compared to the previous year

Finally, with regards to the profitability indicators of the sector, the average daily rate (ADR) of hotels in the Basque Country stood at 85.9 euros in July 2020, 22.4% down on the previous year. The average rate stood at 68.1 euros in Álava, down 14.1%; 70.8 euros in Bizkaia, with a decrease of 21.7%, and 102.7 euros in Gipuzkoa, 28.0% less.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 41.5 euros in July 2020, 53.3% down on July 2019. The RevPAR stood at 30.3 euros in Álava, 30.7 euros in Bizkaia, and 55.9 euros in Gipuzkoa.

351 rural accommodation establishments had business in the month of July 2020, compared to 285 in the previous month

The effect of the COVID-19 crisis in **rural accommodation** was similar to that observed in hotels. Thus, the establishments that offered accommodation in July totalled 351, compared to the 385 that were open in July 2019. Conversely, a total of 80 establishments remained closed during the entire period, as opposed to the 35 that closed in July 2019.

However, as regards the previous month, June 2020, a notable increase in activity was observed, given that the number of establishments with activity in that month was 285, compared to the aforementioned 351 in June. In turn, the number of closed establishments went from 143 in June to 80 in July.

Rural tourism establishments that have been active and those that have remained closed.

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
2020	Active	Closed	Active	Closed	Active	Closed	Active	Closed
July	351	80	88	17	103	28	160	37
June	285	143	68	37	87	42	130	64
May	167	260	30	75	54	74	83	111
April	31	396	3	102	11	117	17	177
March	329	99	89	16	94	35	146	48
July 2019	385	35	96	6	116	11	173	18

Source: Eustat. Survey on tourist establishments

The number of visitors to rural accommodation establishments in the Basque Country stood at 14,054 in July 2020, which was much higher than the 5,063 observed in June, but 34.5% lower than those registered in July 2019. Similarly, overnight stays tripled between June and July, going from 14,847 in June to 44,051 in July 2020. However, compared to July 2019, a 31.7% decrease in the number of overnight stays was observed.

Overnight stays, visitors, average stay and occupancy rate in rural accommodation in the Basque Country. July 2020

	Overnight stays		Visitors		Average stay		Degree of occupation by places (%)	
	07/2020	m/m-12 (%)	07/2020	m/m-12 (%)	07/2020	07/2019	07/2020	p.p.*
BASQUE COUNTRY	44.051	-31,7	14.054	-34,5	3,13	3,00	34,8	-11,6
Araba/Álava	7.073	-14,2	2.316	-29,2	3,05	2,52	23,8	-2,4
Bizkaia	12.499	-38,5	3.791	-45,8	3,30	2,90	33,9	-13,9
Gipuzkoa	24.479	-31,8	7.947	-29,1	3,08	3,20	40,7	-14,6

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

Source: Eustat. Survey on tourist establishments

By province, Álava recorded 2,316 visitors and 7,073 overnight stays, Bizkaia 3,791 visitors and 12,499 overnight stays and, finally, Gipuzkoa 7,947 visitors and 24,479 overnight stays in July.

These figures are far below those observed in July 2019, especially in the case of Bizkaia, although they reveal the revival of activity in the three provinces.

NOTE REGARDING THE EFFECT OF THE COVID-19 CRISIS ON THE SURVEY ON TOURIST ESTABLISHMENTS

Royal Decree 463/2020, of 14 March, declared a state of alarm in order to manage the health crisis caused by **COVID-19**. The exceptional measures adopted subsequently have had a direct impact on the usual activity of tourist establishments. The closure was practically total until the publication of Order SND/399/2020, of 9 May, establishing the conditions for gradual limited opening.

Following the end of the state of alarm on 21 June and with the limitations and prior conditions established via the order of 9 May (SDN/399/2020) for the reopening to the public of hotels and tourist establishments, the activity of this sector progressively increased.

Eustat would like to thank all the establishments that have collaborated in making this effort despite the extraordinary circumstances. As a result, it has been possible to disseminate this information, enabling the effects of the measures adopted on this sector to be quantified.

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