

**SURVEY ON TOURIST ESTABLISHMENTS. HOTELS AND RURAL ACCOMMODATION. SEPTEMBER 2020**

## Visitors registered at hotel establishments in the Basque Country fell by 47.4% during the summer of 2020 and overnight stays were down 50.8%

**The drop in tourists coming from abroad was over 67% and Spanish tourist numbers were down 27.4%**

During all the summer months of 2020 - July, August and September - visitors to hotel establishments in the Basque Country numbered 526,814, resulting in 1,034,437 overnight stays, a reduction of 47.4% in visitors and 50.8% in overnight stays compared to the same period of the previous year.

### Overnight stays, visitor numbers and bed occupancy rates in hotel establishments in the Basque Country. July, august and september 2020

	Overnight stays		Visitors		Degree of occupation (%)			
	Summer 2020	p/p-12 (%)	Summer 2020	p/p-12 (%)	by places		by rooms	
					Summer 2020	p.p.*	Summer 2020	p.p.*
<b>BASQUE COUNTRY</b>	<b>1.034.437</b>	<b>-50,8</b>	<b>526.814</b>	<b>-47,4</b>	<b>40,8</b>	<b>-32,0</b>	<b>47,5</b>	<b>-34,6</b>
State	745.608	-31,7	366.008	-27,4	-	-	-	-
Foreigners	288.829	-71,4	160.806	-67,7	-	-	-	-
<b>ARABA/ÁLAVA</b>	<b>127.621</b>	<b>-50,1</b>	<b>69.140</b>	<b>-47,6</b>	<b>38,8</b>	<b>-25,2</b>	<b>46,8</b>	<b>-28,1</b>
State	103.659	-39,7	54.049	-34,6	-	-	-	-
Extranjeros	23.962	-71,5	15.091	-69,5	-	-	-	-
<b>Vitoria-Gasteiz</b>	<b>83.414</b>	<b>-54,1</b>	<b>43.207</b>	<b>-51,9</b>	<b>38,8</b>	<b>-25,6</b>	<b>50,1</b>	<b>-28,3</b>
<b>BIZKAIA</b>	<b>397.875</b>	<b>-58,7</b>	<b>197.540</b>	<b>-58,7</b>	<b>34,7</b>	<b>-36,4</b>	<b>42,4</b>	<b>-38,8</b>
State	307.752	-39,2	149.082	-38,7	-	-	-	-
Foreigners	90.123	-80,3	48.458	-79,4	-	-	-	-
<b>Bilbao</b>	<b>230.784</b>	<b>-61,2</b>	<b>121.845</b>	<b>-59,3</b>	<b>33,4</b>	<b>-41,5</b>	<b>39,7</b>	<b>-45,3</b>
<b>GIPUZKOA</b>	<b>508.941</b>	<b>-42,2</b>	<b>260.134</b>	<b>-33,6</b>	<b>48,1</b>	<b>-29,8</b>	<b>53,3</b>	<b>-32,5</b>
State	334.197	-19,2	162.877	-8,5	-	-	-	-
Foreigners	174.744	-62,6	97.257	-54,5	-	-	-	-
<b>Donostia / San Sebastián</b>	<b>308.331</b>	<b>-40,3</b>	<b>155.319</b>	<b>-29,6</b>	<b>50,6</b>	<b>-33,9</b>	<b>54,2</b>	<b>-37,3</b>

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

Source: Eustat. Survey on tourist establishments

As such, the effect of the measures taken to combat COVID-19 continues to be a key factor in the development of the sector. In this respect, at the Basque Country level, the bed occupancy rate was 40.8%, 32.0 percentage points lower than the summer of 2019, and the room occupancy rate was 47.5%, 34.6 percentage points below the same period of the previous year.

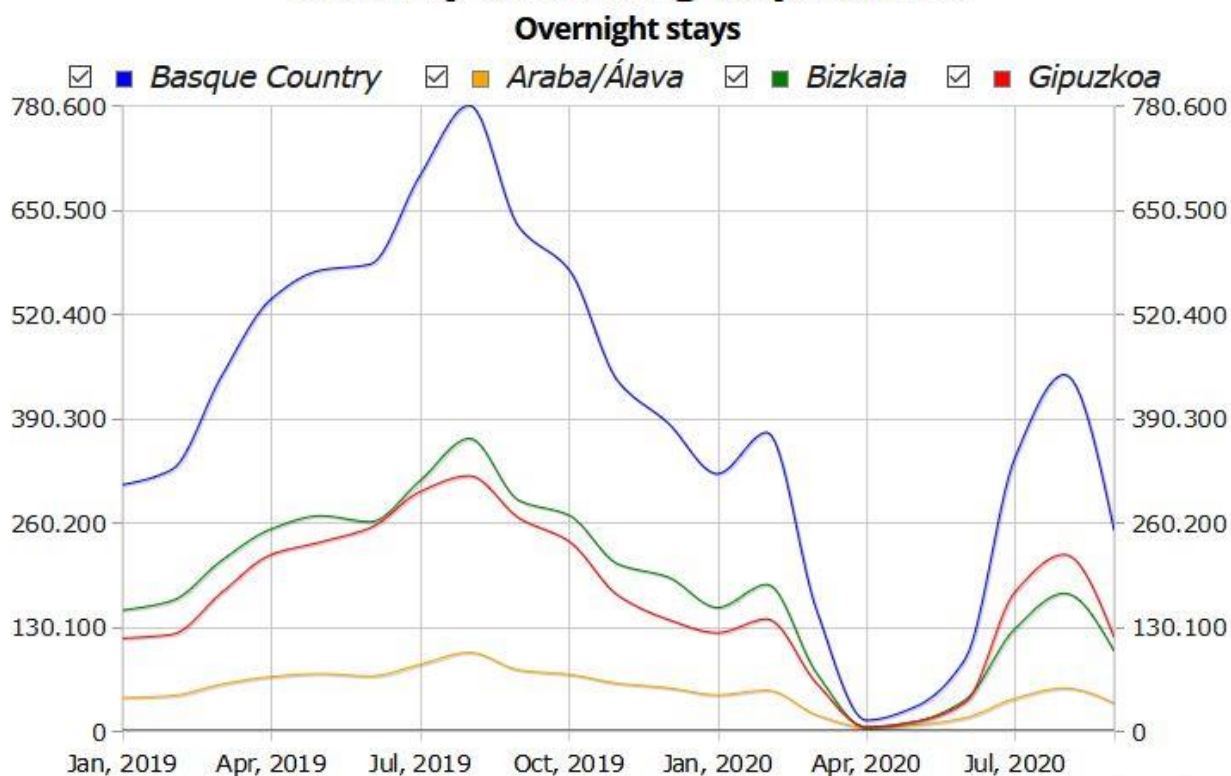
Performance at the provincial level, albeit negative in every case, differed in intensity; as such, Gipuzkoa was the province that registered the lowest decreases, with a drop of 33.6% in visitors and 42.2% in overnight stays; in Álava, however, visitor numbers fell by 47.6% and overnight stays by 50.1%; finally, Bizkaia was the province that recorded the greatest negative variation: 58.7% in both visitors and overnight stays.

As regards occupancy rates, there was a 32.5 percentage point decrease in Gipuzkoa, where the room occupancy rate was 53.3% and a 28.1 percentage point drop in Álava, a province that registered 46.8% room occupancy. Lastly, in Bizkaia, the room occupancy rate fell by 38.8 percentage points to 42.4% over the three summer months.

The loss of both visitors and overnight stays corresponding to tourists from abroad was particularly relevant. In the case of visitor numbers, of the 475,234 fewer visitors registered in summer 2020

compared to summer 2019, those representing foreign tourists amounted to 337,370, comprising 71% of the total. As regards overnight stays, of the 1,066,130 fewer overnight stays recorded this summer, 719,965 corresponded to people who habitually reside abroad, comprising 67.5% of the total decrease.

## Overnight stays in hotel establishments in the Basque Country according to province



**As regards September 2020**, both visitors and overnight stays registered at hotel establishments in the Basque Country experienced a considerable drop in comparison to the figures for the same month of the previous year. Visitor numbers, a total of 130,004 people, fell by 59.0% and overnight stays, which amounted to 249,794, dropped by 60.2%. These figures represent a comparative deterioration with regard to the data observed in August, when 216,967 visitors and 444,267 overnight stays were recorded, comprising year-on-year decreases in August of 39.2% and 43.1%, respectively.

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

	Overnight stays		Visitors		Average stay		Degree of occupation (%)				Profitability			
							by places		by rooms		ADR (euro)		RevPar (euro)	
	09/2020	m/m-12 (%)	09/2020	m/m-12 (%)	09/2020	09/2019	09/2020	p.p.*	09/2020	p.p.*	09/2020	m/m-12 (%)	09/2020	m/m-12 (%)
<b>BASQUE COUNTRY</b>	<b>249.794</b>	<b>-60,2</b>	<b>130.004</b>	<b>-59,0</b>	<b>1,92</b>	<b>1,98</b>	<b>30,0</b>	<b>-37,3</b>	<b>38,5</b>	<b>-42,6</b>	<b>71,7</b>	<b>-33,52</b>	<b>27,6</b>	<b>-68,45</b>
State	193.350	-36,4	99.807	-35,5	1,94	1,96	-	-	-	-	-	-	-	-
Foreigners	56.444	-82,6	30.197	-81,4	1,87	2,00	-	-	-	-	-	-	-	-
<b>ARABA/ÁLAVA</b>	<b>34.255</b>	<b>-54,7</b>	<b>18.094</b>	<b>-55,2</b>	<b>1,89</b>	<b>1,87</b>	<b>32,2</b>	<b>-26,7</b>	<b>42,0</b>	<b>-31,8</b>	<b>61,2</b>	<b>-17,22</b>	<b>25,7</b>	<b>-52,90</b>
State	29.199	-43,3	15.421	-42,8	1,89	1,91	-	-	-	-	-	-	-	-
Extranjeros	5.056	-79,1	2.673	-80,1	1,89	1,80	-	-	-	-	-	-	-	-
<b>Vitoria-Gasteiz</b>	<b>24.224</b>	<b>-54,8</b>	<b>11.941</b>	<b>-55,7</b>	<b>2,03</b>	<b>1,99</b>	<b>34,9</b>	<b>-24,6</b>	<b>47,4</b>	<b>-30,6</b>	<b>53,6</b>	<b>-16,47</b>	<b>25,4</b>	<b>-49,21</b>
<b>BIZKAIA</b>	<b>99.272</b>	<b>-65,4</b>	<b>49.698</b>	<b>-67,0</b>	<b>2,00</b>	<b>1,91</b>	<b>26,0</b>	<b>-39,5</b>	<b>35,3</b>	<b>-45,7</b>	<b>59,7</b>	<b>-37,87</b>	<b>21,1</b>	<b>-72,93</b>
State	81.047	-40,2	40.853	-43,6	1,98	1,87	-	-	-	-	-	-	-	-
Foreigners	18.225	-88,0	8.845	-88,7	2,06	1,94	-	-	-	-	-	-	-	-
<b>Bilbao</b>	<b>59.496</b>	<b>-66,8</b>	<b>31.635</b>	<b>-65,8</b>	<b>1,88</b>	<b>1,94</b>	<b>25,5</b>	<b>-44,4</b>	<b>33,8</b>	<b>-52,6</b>	<b>61,5</b>	<b>-44,56</b>	<b>20,8</b>	<b>-78,31</b>
<b>GIPUZKOA</b>	<b>116.267</b>	<b>-56,2</b>	<b>62.212</b>	<b>-50,6</b>	<b>1,87</b>	<b>2,11</b>	<b>33,8</b>	<b>-38,6</b>	<b>41,0</b>	<b>-42,9</b>	<b>86,5</b>	<b>-34,50</b>	<b>35,5</b>	<b>-67,97</b>
State	83.104	-28,9	43.533	-21,4	1,91	2,11	-	-	-	-	-	-	-	-
Foreigners	33.163	-77,6	18.679	-73,5	1,78	2,10	-	-	-	-	-	-	-	-
<b>Donostia / San Sebastián</b>	<b>68.053</b>	<b>-56,2</b>	<b>36.440</b>	<b>-49,0</b>	<b>1,87</b>	<b>2,18</b>	<b>34,1</b>	<b>-44,6</b>	<b>40,1</b>	<b>-50,1</b>	<b>103,6</b>	<b>-41,26</b>	<b>41,5</b>	<b>-73,91</b>

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

Source: Eustat. Survey on tourist establishments

The effect of the crisis this September compared to the same month of the previous year varied across the provinces. In Gipuzkoa, visitor numbers were down by 50.6% and overnight stays by 56.2%, and in Álava visitor numbers fell by 55.2 % and overnight stays by 54.7%. In Bizkaia the year-on-year decrease was less pronounced, with a 67.0% drop in visitors and a 65.4% fall in overnight stays.

Hotel establishments in the Basque Country as a whole registered 99,807 visitors from Spain, compared to 30,197 from abroad; 35.5% and 81.4% down on September 2019, respectively. Visitor numbers for those coming from abroad represented 23.2% of the total visitor numbers, whereas for the same month in 2019 this percentage rose to 51.2%.

This September the average length of stay was 1.92 days, below the average length of stay of 1.98 days observed in September 2019. Álava registered an increase from 1.87 days last year to 1.89 days in September this year; in Bizkaia the figure also increased from 1.91 days in September 2019 to 2.00 days in September 2020. Finally, in Gipuzkoa the average length of stay was down from 2.11 days in September 2019 to 1.87 days last September.

There was a decrease of 37.3 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 67.3% in September 2019 to 30.0% in September this year. By province, bed occupancy rates stood at 32.2%, 26.0% and 33.8% for Álava, Bizkaia and Gipuzkoa, following year-on-year decreases of 26.7, 39.5 and 38.6 percentage points, respectively.

The highest hotel bed occupancy rate in March this year was recorded on the Gipuzkoa coast (44.5%), followed by Vitoria-Gasteiz (34.9%) and Donostia-San Sebastián (34.1%).

The room occupancy rate also registered a negative variation of 42.6 percentage points, standing at 38.5% for the Basque Country as a whole. By province, the values recorded were 42% for Álava, 41% in Gipuzkoa and 35,3% in Bizkaia.

***The revenue per available room (RevPAR) was down 68.4% in September 2020 and the average daily rate (ADR) shrank by 33.5%***

With regards to the profitability indicators of the sector, the average daily rate (ADR) of hotels in the Basque Country stood at 71.7 euros in September 2020, down 33.5% on the year before. The average room rate was 61.2 euros in Álava, where it fell 17.2%, 59.7 euros in Bizkaia, a drop of 37.9%, and 86.5 euros in Gipuzkoa, down 34.5% compared to September 2019.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 27.6 euros in September 2020, 68.4% down on September 2019. The RevPAR was 25.7 euros in Álava, 21.1 euros in Bizkaia and 35.5 euros in Gipuzkoa, 52.9%, 72.9% and 68.0% lower than the same month in the previous year.

## Rural accommodation

**Overnight stays registered at rural accommodation during summer 2020 were down 36.4% compared to summer 2019**

**Overnight stays, visitors and occupancy rates in rural accommodation in the Basque Country. July, august and september 2020**

	Overnight stays		Visitors		Degrees of occupation (%)			
	Summer 2020	p/p-12 (%)	Summer 2020	p/p-12 (%)	By places		by rooms	
					Summer 2020	p.p.*	Summer 2020	p.p.*
<b>BASQUE COUNTRY</b>	<b>127.703</b>	<b>-36,4</b>	<b>39.930</b>	<b>-37,9</b>	<b>33,4</b>	<b>-15,1</b>	<b>38,3</b>	<b>-14,8</b>
State	117.204	-24,8	36.107	-24,7	-	-	-	-
Foreigners	10.499	-76,8	3.823	-76,7	-	-	-	-
<b>ARABA/ÁLAVA</b>	<b>18.501</b>	<b>-37,5</b>	<b>6.350</b>	<b>-42,1</b>	<b>20,5</b>	<b>-11,1</b>	<b>25,2</b>	<b>-8,8</b>
<b>BIZKAIA</b>	<b>36.948</b>	<b>-42,1</b>	<b>11.135</b>	<b>-47,9</b>	<b>32,9</b>	<b>-17,9</b>	<b>37,7</b>	<b>-17,7</b>
<b>GIPUZKOA</b>	<b>72.254</b>	<b>-32,8</b>	<b>22.445</b>	<b>-29,8</b>	<b>40,3</b>	<b>-14,9</b>	<b>45,3</b>	<b>-15,6</b>

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

Source: Eustat. Survey on tourist establishments

The visitor numbers at rural accommodation in the Basque Country during **July, August and September** 2020 amounted to 39,930 people, 37.9% down on the same period of the previous year. Overnight stays registered in the same period, 127,703, fell by 36.4% compared to summer 2019.

At the provincial level, the decrease in visitor numbers varied, totalling 47.9% in Bizkaia, 42.1% in Álava and 29.8% in Gipuzkoa. Overnight stays fell by 42.1% in Bizkaia, 37.5% in Álava and 32.8% in Gipuzkoa.

The drop in overnight stays led to a decrease in both bed and room occupancy rates at all rural accommodation in the Basque Country: 15.1 percentage points for the bed occupancy rate and 14.8 percentage points for the room occupancy rate, with 33.4% and 38.3% occupancy, respectively, during summer 2020.

**As regards September 2020**, visitor numbers at rural accommodation in the Basque Country totalled 7,521, a year-by-year drop of 61.1%. Overnight stays, which numbered 19,912 people, fell by 56.7% compared to September 2019.

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

	Overnight stays		Visitors		Average stay		Degree of occupation by places (%)	
	09/2020	m/m-12 (%)	09/2020	m/m-12 (%)	09/2020	09/2019	09/2020	p.p.*
<b>BASQUE COUNTRY</b>	<b>19.912</b>	<b>-56,7</b>	<b>7.521</b>	<b>-61,1</b>	<b>2,65</b>	<b>2,38</b>	<b>16,0</b>	<b>-18,3</b>
Araba/Álava	2.480	-65,1	1.027	-68,6	2,41	2,17	8,3	-15,1
Bizkaia	4.997	-67,6	2.110	-69,6	2,37	2,22	13,4	-24,5
Gipuzkoa	12.435	-47,1	4.384	-51,8	2,84	2,58	21,6	-15,6

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

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

All three provinces recorded significant drops. Visitor numbers in Bizkaia fell by 69.6% and in Álava and Gipuzkoa by 68.6% and 51.8%, respectively. Overnight stays performed similarly, with negative variations of 67.6% in Bizkaia, 65.1% in Álava and 47.1% in Gipuzkoa.

**Note:** Eustat would like to thank all the establishments that have collaborated with this survey and for their effort despite the extraordinary circumstances. As a result, it has been possible to disseminate this information, enabling the effects on this sector of the measures adopted in order to combat COVID-19 to be quantified.

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