

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

The number of tourists at hotel establishments in the Basque Country fell by 63% in October 2020

The figures recorded in September fell and, in the case of foreign tourists, there was a drop of around 80%

The number of visitors registered at **hotel establishments** in the Basque Country in October, 109,393 people, dropped by 63.1% compared to same month of the previous year. The 209,716 overnight stays during October signified a year-on-year decrease of 63.6%. These figures represent a comparative deterioration with regard to the data observed in September, when 130,004 visitors and 249,794 overnight stays were recorded, comprising year-on-year decreases in September of 59% and 60.2%, respectively.

Visitor numbers, overnight stays, average stay, bed occupancy rates and profitability in hotel establishments in the Basque Country. October 2020

	Visitors		Overnight stays		Average stay		Degree of occupation (%)				Profitability			
	10/2020	m/m-12 (%)	10/2020	m/m-12 (%)	10/2020	10/2019	by places		by rooms		ADR (euro)	m/m-12 (%)	RevPar (euro)	
							10/2020	10/2019	10/2020	p.p.*			10/2020	m/m-12 (%)
BASQUE COUNTRY	109.393	-63,1	209.716	-63,6	1,92	1,94	25,5	-34,3	33,3	-39,9	69,2	-26,5	23,1	-66,6
State	83.006	-50,2	162.035	-48,2	1,95	1,88	-	-	-	-	-	-	-	-
Foreigners	26.387	-79,7	47.681	-81,8	1,81	2,02	-	-	-	-	-	-	-	-
ARABA/ÁLAVA	17.509	-53,2	33.290	-52,6	1,90	1,87	31,0	-22,2	41,5	-27,8	66,5	-8,4	27,6	-45,1
State	14.618	-45,5	27.705	-44,1	1,90	1,85	-	-	-	-	-	-	-	-
Extranjeros	2.891	-72,8	5.585	-72,9	1,93	1,94	-	-	-	-	-	-	-	-
Vitoria-Gasteiz	12.253	-52,6	24.289	-52,4	1,98	1,98	34,0	-21,0	47,1	-27,9	59,3	-6,4	27,9	-41,2
BIZKAIA	43.721	-68,8	91.334	-66,1	2,09	1,92	24,0	-34,7	32,5	-40,0	63,6	-29,9	20,7	-68,6
State	35.457	-56,3	74.011	-50,3	2,09	1,84	-	-	-	-	-	-	-	-
Foreigners	8.264	-86,0	17.323	-85,6	2,10	2,03	-	-	-	-	-	-	-	-
Bilbao	29.341	-68,4	58.391	-67,6	1,99	1,94	25,5	-40,3	33,7	-46,4	68,0	-34,0	22,9	-72,2
GIPUZKOA	48.163	-59,5	85.092	-64,0	1,77	1,99	25,4	-38,0	31,6	-43,9	77,0	-26,8	24,3	-69,4
State	32.931	-44,0	60.319	-47,4	1,83	1,95	-	-	-	-	-	-	-	-
Foreigners	15.232	-74,7	24.773	-79,7	1,63	2,03	-	-	-	-	-	-	-	-
Donostia / San Sebastián	28.873	-61,4	48.721	-67,1	1,69	1,98	25,4	-48,8	29,5	-56,7	93,3	-30,1	27,5	-76,1

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

Source: Eustat. Survey on tourist establishments

The crisis caused by COVID-19 continued to manifest itself in October with a major impact on the three provinces. In Bizkaia, visitor numbers in October 2020 fell by 68.8% on October 2019, in Gipuzkoa the decrease was 59.5% and, finally, the drop was 53.2% in Álava. In year-on-year terms, the number of overnight stays fell by 66.1% in Bizkaia, 64% in Gipuzkoa and 52.6% in Álava.

In October, hotel establishments in the Basque Country as a whole registered 83,006 visitors from Spain and 26,387 from abroad; 50.2% and 79.7% down on October 2019, respectively. Visitor numbers for those coming from abroad represented 24.1% of the total visitor numbers, whereas for the same month in 2019 this percentage rose to 43.8%.

This October the average length of stay was 1.92 days, below the average length of stay of 1.94 days observed in October 2019. Álava registered an increase from 1.87 days last year to 1.90 days in October this year; in Bizkaia the figure also increased from 1.92 days in October 2019 to 2.09 days in October 2020. Finally, in Gipuzkoa the average length of stay was down from 1.99 days in October 2019 to 1.77 days this October.

There was a decrease of 34.3 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 59.8% in October 2019 to 25.5% in October this year. By province, bed

occupancy rates stood at 31.0% for Álava, 24.0% for Bizkaia and 25.4% for Gipuzkoa, following year-on-year decreases of 22.2, 34.7 and 38 percentage points, respectively.

The room occupancy rate also registered a negative variation of 39.9 percentage points, standing at 33.3% for the Basque Country as a whole. By province, the values recorded were 41.5% for Álava, 32.5% in Bizkaia and 31.6% in Gipuzkoa.

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

2020	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
	Active	Closed	Active	Closed	Active	Closed	Active	Closed
October	501	127	53	22	191	49	257	56
September	525	96	54	21	198	39	273	36
August	532	88	55	20	203	33	274	35
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
October 2019	576	39	68	7	223	12	285	20

Source: Eustat. Survey on tourist establishments

In the Basque Country as a whole, a total of 501 hotel establishments were still operating in October of this year, 24 fewer than in the previous month, September 2020, and 75 fewer than the number open for at least one day in October 2019. On the other hand, the figure for establishments that were closed every day in October 2020 increased compared to the number of hotels that were also closed in September: 127 completely closed in October versus 96 in September 2020. In October 2019, however, 39 establishments were closed for the entire month.

The average daily rate (ADR) and hence the revenue per available room (RevPAR) are obtained using Big Data techniques as of October 2020

In October 2020, Eustat introduced advanced **Big Data** techniques into its processes for producing the ETR in order to obtain the average daily rate (ADR) and the derived variable, revenue per available room (RevPAR). The prices for each of the 120 previous days for every hotel establishment are captured from online booking platforms using web scraping technology. This information is combined with the directory of tourist establishments from the survey using approved statistical models with information sampled in previous years. For more information, the [methodological document](#) is available on the Eustat website.

With regards to the profitability indicators of the sector, the average daily rate (ADR) of hotels in the Basque Country stood at 69.2 euros in October 2020, down 26.5% on the year before. The average room rate was 66.5 euros in Álava, where it fell 8.4%, 63.6 euros in Bizkaia, a drop of 29.9%, and 77 euros in Gipuzkoa, down 26.8% compared to October 2019.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 23.1 euros in October 2020, 66.6% down on October 2019. The RevPAR was 27.6 euros in Álava, 20.7 euros in Bizkaia and 24.3 euros in Gipuzkoa, 45.1%, 68.6% and 69.4% lower than the same month in the previous year.

Rural accommodation

In October 2020, visitor numbers at **rural accommodation** in the Basque Country totalled 5,817, a year-on-year drop of 61.2%. Overnight stays, which numbered 14,238 people, fell by 53.9% compared to October 2019.

Visitors, overnight stays, average stay and occupancy rate in rural accommodation in the Basque Country. October 2020

	Visitors		Overnight stays		Average stay		Degree of occupation by places (%)	
	10/2020	m/m-12 (%)	10/2020	m/m-12 (%)	10/2020	10/2019	10/2020	p.p.*
BASQUE COUNTRY	5.817	-61,2	14.238	-53,9	2,45	2,06	11,3	-11,5
Araba/Álava	840	-74,7	2.182	-60,6	2,60	1,67	7,4	-10,0
Bizkaia	1.701	-64,8	3.612	-65,2	2,12	2,15	9,7	-16,1
Gipuzkoa	3.276	-52,0	8.444	-43,6	2,58	2,19	14,3	-9,5

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

Source: Eustat. Survey on tourist establishments

All three provinces saw significant drops. Visitor numbers were down by 74.7% in Álava, and by 64.8% and 52.0% in Bizkaia and Gipuzkoa, respectively. Overnight stays performed similarly, with negative variations of 60.6% in Álava, 65.2% in Bizkaia and 43.6% in Gipuzkoa.

The effect of the COVID-19 crisis in rural accommodation was similar to that observed in hotels. Thus, the establishments that offered accommodation in October totalled 356, compared to the 380 that were open in October 2019. Conversely, a total of 78 establishments remained closed during the entire period, as opposed to the 42 that were closed in October 2019.

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

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA		
	2020	Active	Closed	Active	Closed	Active	Closed	Active	Closed
October	356	78		89	17	105	25	162	36
September	363	66		93	12	107	23	163	31
August	359	69		93	12	105	24	161	33
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
October 2019	380	42		97	5	113	16	170	21

Source: Eustat. Survey on tourist establishments

Similarly, compared to the previous month, September 2020, a slight reduction in activity was observed, as there were 363 active accommodation establishments in that month as opposed to 356 recorded in October, whilst the number of closed establishments went from 66 in September to 78 in October.

Note: Eustat would like to thank all the establishments that have collaborated with this survey for making this effort despite the extraordinary current 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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