

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

The fall in the number of visitors to and overnight stays at hotel establishments in the Basque Country in 2020 as a whole exceeded 60%

December 2020 ended with 41.1% of hotel establishments having been closed on every day of the month

In 2020, a year deeply marked by the health crisis caused by COVID-19, drops of 61.1% in visitor numbers and 61.5% in overnight stays at hotel establishments in the Basque Country were recorded, according to Eustat data. **There were 1,946,804 fewer visitors and 3,855,902 fewer overnight stays in 2020 than in 2019.**

The impact in the three provinces of travel restrictions adopted in March has been extraordinary. In Álava, visitor numbers fell by 58.6% and overnight stays by 57.1% in 2020 as a whole. In Gipuzkoa, the decreases on 2019 reached 56.9% in the case of visitor numbers and 59.7% in the case of overnight stays. Lastly, in Bizkaia, the drops were even more significant, both in the case of visitor numbers, with a decline of 65.3%, and in the case of overnight stays, which fell by 64.4%, compared to 2019.

Visitors, overnight stays, average stay, occupancy rates and profitability in hotel establishments in the Basque Country. 2020

	Visitors		Overnight stays		Average stay	
	2020	2020/2019 (%)	2020	2020/2019 (%)	2020	2019
BASQUE COUNTRY	1.238.100	-61,1	2.409.708	-61,5	1,95	1,97
State origin	876.196	-52,3	1.725.836	-51,8	1,97	1,95
Foreign origin	361.904	-73,1	683.872	-74,5	1,89	1,99
ARABA/ÁLAVA	172.340	-58,6	338.444	-57,1	1,96	1,89
State origin	138.071	-53,4	275.067	-51,5	1,99	1,92
Foreign origin	34.269	-71,5	63.377	-71,3	1,85	1,84
Vitoria-Gasteiz	121.494	-59,0	251.531	57,2	2,07	1,98
BIZKAIA	527.100	-65,3	1.046.347	-64,4	1,99	1,93
State origin	388.690	-56,3	770.992	-54,5	1,98	1,91
Foreign origin	138.410	-78,0	275.355	-77,8	1,99	1,97
Bilbao	349.737	-64,8	656.679	-65,5	1,88	1,92
GIPUZKOA	538.660	-56,9	1.024.917	-59,7	1,90	2,03
State origin	349.435	-46,5	679.777	-48,5	1,95	2,02
Foreign origin	189.225	-68,3	345.140	-71,7	1,82	2,04
Donostia-San Sebastián	317.195	-57,2	594.511	-61,0	1,87	2,06

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

Source: Eustat. Survey on tourist establishments

Numbers of foreign visitors and overnight stays of foreigners saw the largest decrease throughout 2020, with a 73.1% drop in visitors and 74.5% in the case of overnight stays compared to 2019. Bizkaia was the most affected by the decline in foreign tourism, as visitor numbers dropped by 78.0% and overnight stays by 77.8%.

Bed occupancy rates and profitability in hotel establishments in the Basque Country. 2020

	Occupancy rates(%)				Profitability			
	by places		by rooms		ADR (euro)		RevPar (euro)	
	2020	p.p.*	2020	p.p.*	2020	p/p-1 (%)	2020	p/p-1 (%)
BASQUE COUNTRY	32,8	-24,6	41,0	-27,4	72,62	-22,3	29,79	-53,4
ARABA/ÁLAVA	31,9	-19,7	41,9	-21,8	60,13	-17,0	25,17	-45,4
Vitoria-Gasteiz	32,5	-20,9	44,8	-23,3	54,36	-17,3	24,34	-45,6
BIZKAIA	30,5	-26,1	39,6	-29,1	66,00	-23,1	26,11	-55,7
Bilbao	31,4	-30,3	39,8	-34,7	69,52	-27,5	27,63	-61,3
GIPUZKOA	35,8	-24,6	42,5	-27,3	84,55	-22,9	35,91	-53,1
Donostia / San Sebastián	38,7	-28,7	43,8	-32,4	100,95	-27,9	44,23	-58,5

p/p-1 Tasa de variación interanual en el último periodo observado (p) respecto al mismo periodo del año anterior (p-1)

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

Source: Eustat. Survey on tourist establishments

In comparison with 2019, the bed occupancy rate in 2020 fell by 24.6 percentage points and 27.4 points when calculated based on rooms on offer. The bed occupancy rate thus stood at 32.8% and the room occupancy rate was 41.0%. In Álava, the bed occupancy rate fell by 19.7 percentage points and the room occupancy rate dropped 21.8 points. In the case of Bizkaia, the decreases stood at 26.1 and 29.1 percentage points, respectively, and, lastly, the bed occupancy rate fell by 24.6 percentage points and the room occupancy was down 27.3 points in the case of Gipuzkoa.

With regards to the profitability indicators of the sector, the average daily rate (ADR) of hotels in the Basque Country stood at 72.62 euros in 2020, down 22.3% on 2019. The average rate stood at 60.13 euros in Álava, where it fell by 17.0%; 66.00 euros in Bizkaia, with a decrease of 23.1%, and 84.55 euros in Gipuzkoa, following a 22.9% drop.

Lastly, the revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 29.79 euros in 2020, a 53.4% decrease on 2019. The RevPAR was 25.17 euros in Álava, 26.11 euros in Bizkaia and 25.91 euros in Gipuzkoa; meaning that the RevPAR was down 45.4%, 55.7% and 53.1%, respectively, in each of the territories.

2020 ended with 41.1% of their hotel establishments completely closed, compared to 12.2% of establishments that remained closed for the entire month of December 2019. The negative trend from the summer months therefore continued, with closures recorded in December exceeding those in June (39.8%).

Hotel establishments that have been closed (%). COVID19 period

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
	2020	2019	2020	2019	2020	2019	2020	2019
December	41,1	12,2	36,0	13,3	38,4	11,5	44,4	12,5
November	38,4	10,6	36,0	9,3	34,3	10,7	42,2	10,8
October *	20,2	6,3	29,3	9,3	20,4	5,1	17,9	6,6
September	15,5	4,9	28,0	9,3	16,5	4,7	11,7	3,9
August	14,2	5,1	26,7	9,3	14,0	4,3	11,3	4,6
July	17,6	5,4	26,7	9,3	18,3	4,7	14,9	4,9
June	39,8	5,9	38,7	9,3	40,0	5,6	39,9	5,2
May	69,6	6,7	73,3	12,0	66,1	4,7	71,3	6,9
April	91,0	5,7	92,0	13,3	87,7	3,5	93,2	5,6
March	14,1	10,5	17,3	14,7	12,7	8,7	14,3	10,8

Source: Eustat. Survey on tourist establishments

By province, 36.0% of hotel establishments in Álava, 38.4% in Bizkaia and 44.4% in Gipuzkoa were completely closed for the entire month of December 2020.

Hotel establishments: December 2020

In December 2020, there were 56,534 visitors registered in hotel establishments in the Basque Country, which was a drop of 72.9% compared to December 2019. The year-on-year decrease reached 70.6% in Álava, 73.0% in Bizkaia and 73.7% in Gipuzkoa.

Visitors, overnight stays and average stay in hotel establishments in the Basque Country. December 2020

	Visitors		Overnight stays		Average stay	
	12/2020	m/m-12 (%)	12/2020	m/m-12 (%)	12/2020	12/2019
BASQUE COUNTRY	56.534	-72,9	99.388	-74,1	1,76	1,84
State origin	46.340	-68,7	81.073	-70,3	1,75	1,84
Foreign origin	10.194	-83,2	18.315	-83,5	1,80	1,83
ARABA/ÁLAVA	8.468	-70,6	17.141	-68,0	2,02	1,86
State origin	6.755	-72,1	14.065	-68,8	2,08	1,86
Foreign origin	1.713	-63,1	3.076	-63,4	1,80	1,81
Vitoria-Gasteiz	7.552	-65,9	15.422	-63,4	2,04	1,90
BIZKAIA	28.229	-73,0	49.317	-74,3	1,75	1,83
State origin	25.170	-66,8	42.814	-68,8	1,70	1,81
Foreign origin	3.059	-89,4	6.503	-88,1	2,13	1,89
Bilbao	20.478	-71,9	32.713	-75,5	1,60	1,83
GIPUZKOA	19.837	-73,7	32.930	-76,3	1,66	1,84
State origin	14.415	-70,0	24.194	-73,3	1,68	1,88
Foreign origin	5.422	-80,1	8.736	-81,9	1,61	1,77
Donostia / San Sebastián	11.819	-75,8	18.144	-79,4	1,54	1,81

Source: Eustat. Survey on tourist establishments

The number of overnight stays stood at 99,388, a 74.1% drop in the Basque Country as a whole. By province, the decreases recorded were 68.0% in Álava, 74.3% in the case of Bizkaia and 76,3% in Gipuzkoa.

Of particular note is the drop in the number of visitors and overnight stays of travellers from abroad, which reached 83.2% in the case of visitor numbers and 83.5% in the case of overnight stays. Bizkaia saw the most significant decrease, with drops of around 90% for both.

The average length of stay was 1.76 days in December 2020, slightly below the 1.84 days average length of stay that was observed in December 2019. In Álava there was in fact an increase from 1.86 days in December 2019 to 2.02 days in December 2020; in Bizkaia the average stay was shortened from 1.83 days in December 2019 to 1.75 days in December 2020; the average length of stay was also down in Gipuzkoa, going from 1.84 days in December 2019 to 1.66 days in December 2020.

**Bed occupancy rates and profitability in hotel establishments in the Basque Country.
December 2020**

	Occupancy rates(%)				Profitability			
	by places		by rooms		ADR (euro)		RevPar (euro)	
	12/2020	p.p.*	12/2020	p.p.*	12/2020	m/m-12 (%)	12/2020	m/m-12 (%)
BASQUE COUNTRY	15,7	-28,5	21,4	-30,8	62,3	-18,9	13,3	-66,7
ARABA/ÁLAVA	17,9	-24,8	26,2	-26,1	57,5	-11,3	15,0	-55,6
Vitoria-Gasteiz	20,1	-25,3	29,7	-27,6	57,7	-2,6	17,1	-49,5
BIZKAIA	15,8	-28,5	21,5	-31,5	59,8	-20,0	12,8	-67,6
Bilbao	16,6	-33,1	22,0	-36,4	62,1	-23,0	13,7	-71,0
GIPUZKOA	14,5	-29,9	19,3	-31,7	68,9	-18,6	13,3	-69,2
Donostia / San Sebastián	15,2	-34,8	19,7	-35,9	81,5	-19,4	16,0	-71,5

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

Source: Eustat. Survey on tourist establishments

The bed occupancy rate in December 2020 fell compared to December 2019 by 28.5 percentage points, standing at 15.7% for the Basque Country as a whole. There were decreases across the board, with drops of 24.8 percentage points in Álava, 28.5 points in Bizkaia and 29.9 points in Gipuzkoa. By capitals, Bilbao and Donostia/San Sebastián are of particular note as their bed occupancy rates fell by 33.1 and 34.8 percentage points, respectively. Similar results were obtained when the room occupancy rate was analysed.

2020 balance for rural accommodation: the number of visitors fell by 59.2% and overnight stays dropped 52.4% compared to the previous year

Throughout 2020, a total of 68,184 visitors to rural tourism establishments and country cottages were recorded in the Basque Country, a drop of 59.2% on 2019. In a similar vein, the 205,389 overnight stays observed in 2020 were down 52.4% on the previous year. The drops in the number of foreign visitors and overnight stays were significant, as they were 81.8% and 77.9% lower in 2020 than in 2019.

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

	Visitors		Overnight stays		Average stay		Occupancy rates (%)		by rooms	
	2020	2020/2019 (%)	2020	2020/2019 (%)	2020	2019	2020	p.p.*	2020	p.p.*
BASQUE COUNTRY	68.184	-59,2	205.389	-52,4	3,01	2,58	18,4	-10,2	22,6	-9,5
State origin	62.008	-53,4	186.477	-46,1	3,01	2,60	-	-	-	-
Foreign origin	6.176	-81,8	18.912	-77,9	3,06	2,51	-	-	-	-
ARABA/ÁLAVA	11.076	-66,1	30.220	-59,1	2,73	2,26	11,5	-9,3	14,9	-8,1
State origin	10.694	-62,4	29.553	-54,6	2,76	2,29	-	-	-	-
Foreign origin	382	-91,0	667	-92,4	1,75	2,06	-	-	-	-
BIZKAIA	18.782	-63,8	57.089	-57,1	3,04	2,57	18,0	-11,5	22,5	-10,7
State origin	17.294	-56,6	52.909	-48,7	3,06	2,59	-	-	-	-
Foreign origin	1.488	-87,6	4.180	-86,1	2,81	2,50	-	-	-	-
GIPUZKOA	38.326	-53,6	118.080	-47,5	3,08	2,72	22,1	-9,8	26,5	-9,6
State origin	34.020	-47,5	104.015	-41,5	3,06	2,75	-	-	-	-
Foreign origin	4.306	-75,8	14.065	-69,9	3,27	2,63	-	-	-	-

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

Source: Eustat. Survey on tourist establishments

Visitor numbers decreased by 66.1% in Álava, 63.8% in Bizkaia and 53.6% in Gipuzkoa. As regards overnight stays, the registered year-on-year decreases were 59.1% in Álava, 57.1% in Bizkaia and 47.5% in Gipuzkoa. As in the case of hotel establishments, the number of foreign visitors and overnight stays of people from abroad saw the largest decreases compared to 2019, with drops of 81.8% and 77.9%, respectively, in the Basque Country as a whole.

The average length of stay per visitor increased in 2020, from 2.58 days in 2019 to 3.01 days in 2020. This increase was observed in all three provinces (from 2.26 days in 2019 to 2.73 days in 2020 in Álava, 2.57 days to 3.04 days in Bizkaia and from 2.72 days to 3.08 days in Gipuzkoa).

The bed occupancy rate fell from 10.2 percentage points and the room occupancy rate dropped by 9.5 percentage points. There were downturns in all three provinces.

Rural accommodations that have been closed (%). COVID19 period

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
	2020	2019	2020	2019	2020	2019	2020	2019
December	30,7	15,6	27,4	11,8	37,4	20,9	28,0	14,1
November	28,6	13,5	25,5	6,9	35,9	20,2	25,5	12,6
October *	18,0	10,0	16,0	4,9	19,2	12,4	18,2	11,0
September	15,4	8,1	11,4	6,9	17,7	9,4	16,0	7,9
August	16,1	8,1	11,4	5,9	18,6	9,4	17,0	8,4
July	18,6	8,3	16,2	5,9	21,4	8,7	17,9	9,4
June	33,4	11,4	35,2	6,9	32,6	12,6	33,0	13,1
May	60,9	12,1	71,4	6,8	57,8	14,1	57,2	13,6
April	92,7	11,6	97,1	6,8	91,4	12,5	91,2	13,6
March	23,1	17,5	15,2	10,9	27,1	18,1	24,7	20,5

Source: Eustat. Survey on tourist establishments

2020 ended with 30.7% of rural tourism establishments closed, whereas 15.6% were closed in the same month of the previous year. It is worth noting that for this type of accommodation, a large number of establishments remained open but did not report any business owing to the travel restrictions and limits on the number of individuals permitted per group.

Rural accommodation: December 2020

There were 963 visitors to rural tourism establishments in the Basque Country in December 2020, 91.2% fewer than the same month of the previous year. By province, in Álava the number of visitors was down 94.1%, in Bizkaia there was a drop of 93.2%, and in Gipuzkoa there was a decrease of 88.2%. The drop in visitor numbers is due to the fall in the number of visitors both from the rest of Spain (-91.2%) and from abroad (-91.1%).

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

	Visitors		Overnight stays		Average stay		Occupancy rates(%)			
	12/2020	m/m-12 (%)	12/2020	m/m-12 (%)	12/2020	12/2019	12/2020	p.p.*	12/2020	p.p.*
BASQUE COUNTRY	963	-91,2	2.950	-88,6	3,06	2,37	2,8	-18,5	4,4	-18,5
State origin	885	-91,2	2.768	-88,5	3,13	2,40	-	-	-	-
Foreign origin	78	-91,1	182	-89,7	2,33	2,00	-	-	-	-
ARABA/ÁLAVA	141	-94,1	515	-90,0	3,65	2,14	2,0	-15,7	3,3	-15,0
State origin	139	-94,1	513	-89,8	3,69	2,15	-	-	-	-
Foreign origin	2	-95,1	2	-97,6	1,00	2,07	-	-	-	-
BIZKAIA	252	-93,2	814	-89,5	3,23	2,09	2,9	-19,2	5,1	-19,6
State origin	195	-94,2	698	-90,2	3,58	2,12	-	-	-	-
Foreign origin	57	-84,5	116	-82,0	2,04	1,76	-	-	-	-
GIPUZKOA	570	-88,2	1.621	-87,6	2,84	2,71	3,2	-19,6	4,5	-19,5
State origin	551	-87,3	1.557	-87,0	2,83	2,76	-	-	-	-
Foreign origin	19	-96,0	64	-93,8	3,37	2,19	-	-	-	-

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

Source: Eustat. Survey on tourist establishments

In December 2020, 2,950 overnight stays were recorded at rural tourism establishments and country cottages in the Basque Country, a decrease of 88.6% compared to the same month of the previous year. By province, in Álava they were down 90%, in Bizkaia 89.5% and in Gipuzkoa 87.6%.

The bed occupancy rate was only 2.8%, 18.5 percentage points below the rate observed in December 2019. In Álava it decreased by 15.7 percentage points, standing at 2.0%. In Bizkaia, it fell by 19.2 percentage points and in Gipuzkoa by 19.6 points, with the bed occupancy rate standing at 2.9% and 3.2%, respectively.

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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