

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. April 2021

The number of visitors and overnight stays at hotel establishments in the Basque Country continued to increase during April 2021

However, 28.1% of hotel establishments did not have any business on any day in April

In April 2021, the number of visitors and overnight stays recorded at hotel establishments in the Basque Country rose to 93,844 and 174,769, respectively, according to Eustat data. Visitor numbers had therefore recovered by 4.4% and overnight stays by 9.9% since March 2021.

Movement restrictions have been variable after the state of emergency was decreed on 14 March 2020 to combat the COVID-19 pandemic. In any case, April 2020 was the month where the measures had the largest impact on the tourism sector. Because hotel activity was reduced to healthcare and other essential staff, most series were not published due to statistical secrecy safeguards and statistical quality criteria, meaning that no year-on-year comparisons can be drawn with April 2020. As a result, March 2021 is used for comparisons over time.

Visitors, overnight stays and average stay in hotel establishments in the Basque Country. April 2021

| | Visitors | | Overnight stays | | Average stay | |
|--------------------------|---------------|------------|-----------------|-------------|--------------|-------------|
| | 04/2021 | m/m-1 (%) | 04/2021 | m/m-1 (%) | 04/2021 | 03/2021 |
| BASQUE COUNTRY | 93.844 | 4,4 | 174.769 | 9,9 | 1,86 | 1,77 |
| State origin | 80.641 | 5,1 | 147.584 | 10,8 | 1,83 | 1,74 |
| Foreign origin | 13.203 | -0,1 | 27.185 | 5,6 | 2,06 | 1,95 |
| ARABA/ÁLAVA | 15.633 | 1,3 | 32.401 | 10,9 | 2,07 | 1,89 |
| State origin | 13.688 | 0,9 | 28.113 | 10,2 | 2,05 | 1,88 |
| Foreign origin | 1.945 | 3,7 | 4.288 | 15,8 | 2,20 | 1,97 |
| Vitoria-Gasteiz | 11.684 | 6,0 | 24.469 | 10,1 | 2,09 | 2,01 |
| BIZKAIA | 40.003 | 8,0 | 74.290 | 9,3 | 1,86 | 1,84 |
| State origin | 35.267 | 7,4 | 63.134 | 8,2 | 1,79 | 1,78 |
| Foreign origin | 4.736 | 13,0 | 11.156 | 16,0 | 2,36 | 2,30 |
| Bilbao | 23.276 | -0,3 | 40.630 | 1,3 | 1,75 | 1,72 |
| GIPUZKOA | 38.208 | 2,0 | 68.078 | 10,1 | 1,78 | 1,65 |
| State origin | 31.686 | 4,5 | 56.337 | 14,1 | 1,78 | 1,63 |
| Foreign origin | 6.522 | -8,8 | 11.741 | -5,5 | 1,80 | 1,74 |
| Donostia / San Sebastián | 21.352 | -1,1 | 36.537 | 7,4 | 1,71 | 1,58 |

Source: Eustat. Survey on tourist establishments

In April 2021, Álava recorded 15,633 visitors and 32,401 overnight stays, 1.3% and 10.9% more than the previous month. In Bizkaia, there was an 8.0% increase in visitors and 9.3% in overnight stays in April 2021, standing at 40,003 and 74,290, respectively. Lastly, in Gipuzkoa, visitor

numbers and overnight stays stood at 38,208 and 68,078 in April 2021, following a month-on-month increase of 2.0% in visitors and 10.1% overnight stays.

In the same month, visitors from abroad accounted for 14.1% of all visitors, hence the proportion of visitors from the rest of Spain was 85.9%. Overnight stays showed a similar distribution, with people residing abroad accounting for 15.6% of overnight stays and people from the rest of Spain accounting for 84.4%.

Differences were observed between provinces: in Bizkaia, the number of visitors and overnight stays of people from abroad increased by 13.0% and 16.0%, respectively, compared to the previous month; in Álava, there was a 3.7% rise in visitors and 15.8% in overnight stays; in Gipuzkoa, on the other hand, the number of visitors from abroad was down 8.8% and overnight stays of people from abroad fell by 5.5% in month-on-month terms.

The average length of stay of visitors to the Basque Country during April was 1.86 days (it was 1.77 days in March). The average length of stay varied depending on origin of residence, given that in the case of foreigners it was 2.06 days and in the case of people from the rest of Spain it was 1.83 days. The difference was more striking in Bizkaia, with an average length of stay of people from abroad of 2.36 days, compared to 1.79 days for people from the rest of Spain.

Bed occupancy rates and profitability in hotel establishments in the Basque Country. April 2021

| | Occupancy rates(%) | | | | Profitability | | | |
|--------------------------|--------------------|------------|-------------|-------------|---------------|-------------|---------------|-------------|
| | by places | | by rooms | | ADR (euro) | | RevPar (euro) | |
| | 04/2021 | p.p.* | 04/2021 | p.p.* | 04/2021 | m/m-1 (%) | 04/2021 | m/m-1 (%) |
| BASQUE COUNTRY | 23,6 | 1,2 | 30,8 | 0,4 | 77,18 | 17,3 | 23,77 | 19,1 |
| ARABA/ÁLAVA | 27,2 | 2,5 | 34,4 | 0,4 | 69,15 | 15,3 | 23,75 | 16,6 |
| Vitoria-Gasteiz | 27,2 | 2,5 | 35,9 | 0,2 | 67,60 | 14,7 | 24,27 | 15,5 |
| BIZKAIA | 21,5 | 1,3 | 29,4 | 1,1 | 72,40 | 14,8 | 21,28 | 19,1 |
| Bilbao | 18,8 | -0,1 | 25,6 | 0,1 | 75,81 | 15,7 | 19,40 | 16,1 |
| GIPUZKOA | 24,8 | 0,5 | 31,0 | -0,4 | 86,62 | 20,5 | 26,92 | 19,3 |
| Donostia / San Sebastián | 24,9 | -1,4 | 30,0 | -2,8 | 104,52 | 25,7 | 31,40 | 15,1 |

Source: Eustat. Survey on tourist establishments

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

Bed and room occupancy rates of hotel establishments with business in April 2021 were higher than those observed in the previous month, going from 22.4% in March 2021 to 23.6% in April in the case of bed occupancy, and from 30.4% to 30.8% in the case of room occupancy.

The bed occupancy rate stood at 27.2% in Álava, 24.8% in Gipuzkoa and 21.5% in Bizkaia. The room occupancy rate was 34.4% in Álava, 31.0% in Gipuzkoa and 29.4% in Bizkaia.

The provincial capital with the highest bed occupancy rate was Vitoria-Gasteiz (27.2%), while Bilbao had the lowest (18.8%). The variation in room occupancy followed a similar trend, though to a lesser degree.

Profitability indicators of the sector followed an upward trend. The average daily rate (ADR) stood at 77.18 euros in April, up 17.3% on the 65.78 euros observed in March. All provinces saw an increase, standing at 86.62 euros in Gipuzkoa (104.52 euros in San Sebastián), 72.40 euros in Bizkaia (75.81 euros in Bilbao) and 69.15 euros in Álava (67.60 euros in Vitoria-Gasteiz).

Likewise, revenue per available room (RevPAR) in the Basque Country went from 19.96 euros in March to 23.77 in April 2021, an increase of 19.1%.

Hotel establishments that have been closed (%)

| | BASQUE COUNTRY | | | ARABA/ÁLAVA | | | BIZKAIA | | | GIPUZKOA | | |
|--------------|----------------|-------------|------------|-------------|-------------|-------------|-------------|-------------|------------|-------------|-------------|------------|
| | 2021 | 2020 | 2019 | 2021 | 2020 | 2019 | 2021 | 2020 | 2019 | 2021 | 2020 | 2019 |
| January | 42,7 | 18,2 | 16,9 | 41,3 | 18,7 | 18,7 | 38,8 | 16,2 | 14,1 | 46,0 | 19,7 | 18,6 |
| February | 42,2 | 15,1 | 16,7 | 42,1 | 16,0 | 21,3 | 37,2 | 15,0 | 13,7 | 46,0 | 15,1 | 17,9 |
| March | 31,6 | 14,1 | 10,5 | 25,0 | 17,3 | 14,7 | 28,9 | 12,7 | 8,7 | 35,2 | 14,3 | 10,8 |
| April | 28,1 | 91,0 | 5,7 | 23,7 | 92,0 | 13,3 | 22,6 | 87,7 | 3,5 | 33,4 | 93,2 | 5,6 |
| May | | 69,6 | 6,7 | | 73,3 | 12,0 | | 66,1 | 4,7 | | 71,3 | 6,9 |
| June | | 39,8 | 5,9 | | 38,7 | 9,3 | | 40,0 | 5,6 | | 39,9 | 5,2 |
| July | | 17,6 | 5,4 | | 26,7 | 9,3 | | 18,3 | 4,7 | | 14,9 | 4,9 |
| August | | 14,2 | 5,1 | | 26,7 | 9,3 | | 14,0 | 4,3 | | 11,3 | 4,6 |
| September | | 15,5 | 4,9 | | 28,0 | 9,3 | | 16,5 | 4,7 | | 11,7 | 3,9 |
| October | | 20,2 | 6,3 | | 29,3 | 9,3 | | 20,4 | 5,1 | | 17,9 | 6,6 |
| November | | 38,4 | 10,6 | | 36,0 | 9,3 | | 34,3 | 10,7 | | 42,2 | 10,8 |
| December | | 41,1 | 12,2 | | 36,0 | 13,3 | | 38,4 | 11,5 | | 44,4 | 12,5 |

Source: Eustat. Survey on tourist establishments

The variation in the percentage of hotel establishments closed every day of the month shows that the impact on the hotel sector of the restrictions adopted to tackle COVID-19, while still significant, had improved slightly. In April 2021, 28.1% of hotel establishments remained closed every day of the month, 2.5 percentage points less than in March 2021. In Gipuzkoa, 33.4% of establishments had no business at all in April 2021, while in Álava it was 23.7% and in Bizkaia, 22.8%.

During **Easter 2021** (from Thursday night to Sunday night), hotel establishments in the Basque Country recorded 27,738 visitors and 47,557 overnight stays. These figures need to be put into context with years other than 2020 for the reasons outlined above. Thus, the number of visitors recorded over the four nights of Easter 2021 was down 40.9% on 2019 and 33.7% lower than in 2018. The drops in the number of overnight stays with respect to the two years prior to the COVID-19 outbreak stood at 53.4% compared to 2019 and 46.3% compared to 2018.

The trends were uneven across the provinces. In Álava, the drop in visitor numbers compared to 2019 and 2018 was more moderate (down 19% and 11.3%, respectively) than in Gipuzkoa (33.3% and 29.4% lower) and especially Bizkaia (down 53.2% and 44.2% on 2019 and 2018, respectively). There were similar trends in terms of overnight stays.

It is worth noting, in any case, that the number of visitors and overnight stays of people from abroad fell by more than 80% compared to both years. Visitors and overnight stays of people from the rest of Spain performed better over the Easter period, with decreases of 15% in the case of visitor numbers and 36% in the case of overnight stays.

Visitors, overnight stays and occupancy rates of hotel establishments in the Basque Country by geographical area and origin. Easter(*)

| | Visitors | | | | Overnight stays | | | |
|--------------------------|---------------|------|---------------|---------------|-----------------|------|----------------|---------------|
| | 2021 | 2020 | 2019 | 2018 | 2021 | 2020 | 2019 | 2018 |
| HOTELS | | | | | | | | |
| BASQUE COUNTRY | 27.738 | : | 46.969 | 41.808 | 47.557 | : | 101.980 | 88.597 |
| State origin | 25.330 | : | 29.785 | 29.341 | 43.203 | : | 67.668 | 63.385 |
| Foreign origin | 2.408 | : | 17.184 | 12.467 | 4.354 | : | 34.312 | 25.212 |
| ARABA/ÁLAVA | 4.938 | : | 6.096 | 5.564 | 10.190 | : | 13.083 | 11.478 |
| Vitoria-Gasteiz | 3.271 | : | 3.754 | 3.843 | 6.712 | : | 8.512 | 7.959 |
| BIZKAIA | 10.469 | : | 22.385 | 18.769 | 16.973 | : | 47.262 | 41.276 |
| Bilbao | 6.469 | : | 13.517 | 11.487 | 10.092 | : | 28.999 | 25.621 |
| GIPUZKOA | 12.331 | : | 18.488 | 17.475 | 20.394 | : | 41.635 | 35.843 |
| Donostia / San Sebastián | 6.820 | : | 10.101 | 10.066 | 11.693 | : | 23.492 | 20.650 |

Source: Eustat. Survey on tourist establishments

(*) Easter: Thursday to Sunday (4 nights)

(:) Information unavailable, either due to the low quality of the data, secrecy (confidentiality) or any other reason of a statistical nature

Note. The coverage of the ETR for Hotels in April was **94.7%**. Eustat would like to thank all establishments that participated in this survey for their effort.

For further information:

Eustat - Euskal Estatistika Erakundea / Basque Statistics Institute

C/ Donostia-San Sebastián, 1 01010 Vitoria-Gasteiz

Press Service: servicioprensa@eustat.es Tel: 945 01 75 62