

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. December 2023

In 2023, visitor numbers and overnight stays at hotel establishments in the Basque Country increased by 10.4% and 12% respectively, compared to 2022

In December 2023, visitor numbers rose by 6.6% and overnight stays were up 7.0% in relation to December 2022

In 2023 as a whole, the total number of visitors at hotel establishments in the Basque Country rose to 3,687,240 and there were 7,214,545 overnight stays, according to Eustat data. Compared to 2022 as a whole, there was a 10.4% increase in the case of visitor numbers and 12.0% in that of overnight stays.

Visitors, overnight stays and average stay in hotel establishments in the Basque Country. 2023

	Visitors		Overnight stays		Average stay	
	2023	p/p-1 (%)	2023	p/p-1 (%)	2023	2022
BASQUE COUNTRY	3.687.240	10,4	7.214.545	12,0	1,96	1,93
State origin	2.013.945	3,7	3.883.449	5,1	1,93	1,90
Foreign origin	1.673.295	19,7	3.331.096	21,3	1,99	1,97
Araba/Álava	503.596	11,2	998.496	18,2	1,98	1,87
State origin	349.857	10,7	699.341	15,3	2,00	1,92
Foreign origin	153.739	12,6	299.155	25,7	1,95	1,74
Vitoria-Gasteiz	385.087	14,8	799.431	23,3	2,08	1,93
Bizkaia	1.688.130	11,5	3.233.468	11,8	1,92	1,91
State origin	937.583	2,9	1.737.531	2,4	1,85	1,86
Foreign origin	750.547	24,6	1.495.937	25,1	1,99	1,99
Bilbao	1.151.352	10,9	2.233.620	12,9	1,94	1,91
Gipuzkoa	1.495.514	8,8	2.982.581	10,3	1,99	1,97
State origin	726.505	1,5	1.446.577	3,9	1,99	1,95
Foreign origin	769.009	16,8	1.536.004	17,0	2,00	1,99
Donostia / San Sebastian	960.282	11,3	1.947.513	11,4	2,03	2,03

p/p-1 Year-on-year rate of change in the last observed period (p) with respect to the same period of the previous year (p-1)

Date January 23, 2024

Source: Eustat Tourist accommodating establishments survey

At provincial level, the number of visitors at hotel establishments in Álava over the course of 2023 rose to 503,596, 13.7% of the total for the Basque Country, which led to 998,496 overnight stays, 13.8% of the total. Bizkaia accounted for 45.8% of visitor numbers (1,688,130) and 44.8% of overnight stays (3,233,468). Gipuzkoa, with 40.6% of visitors, contributed 1,495,514 to the overall figure, and the 2,982,581 overnight stays there comprised 41.3% of the total.

These figures represented year-on-year growth in the number of visitors of 11.2% in Álava, 11.5% in Bizkaia and 8.8% in Gipuzkoa. Overnight stays performed similarly in 2023, with increases in respect of the previous year of 18.2% in Álava, 11.8% in Bizkaia and 10.3% in Gipuzkoa. Of particular note were the rises in foreign visitor numbers and overnight stays in the Basque Country, calculated at 19.7% and 21.3%, respectively.

The three provincial capitals performed better than the rest of the corresponding province, with year-on-year increases in the total number of visitors throughout the year of 14.8% in Vitoria-Gasteiz, 11.3% in San Sebastián and 10.9% in Bilbao. Likewise, in the case of overnight stays, the year-on-year rises stood at 23.3% in Vitoria-Gasteiz, 11.4% in San Sebastián and 12.9% in Bilbao.

The average length of stay in 2023 was 1.96 days in the Basque Country as a whole, slightly higher than that observed the previous year, which was 1.93 days. In Álava, this was 1.98 days compared to 1.87 in 2022; in Bizkaia it stood at 1.92 days, very similar to the 1.91 days obtained in 2022 and finally, in Gipuzkoa it reached 1.99 days compared to 1.97 days the year before.

Bed occupancy rates and profitability in hotel establishments in the Basque Country. 2023

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	2023	p.p. *	2023	p.p. *	2023	p/p-1 (%)	2023	p/p-1 (%)
BASQUE COUNTRY	57,8	3,9	68,5	5,0	108,25	9,6	74,12	18,2
Araba/Álava	54,5	4,4	67,9	5,2	84,31	3,9	57,26	12,4
Vitoria-Gasteiz	55,6	5,4	71,8	6,1	71,03	4,8	50,97	14,5
Bizkaia	56,0	4,2	67,7	5,8	100,70	10,5	68,13	20,8
Bilbao	61,3	5,5	73,4	7,7	111,14	10,4	81,52	23,3
Gipuzkoa	61,1	3,3	69,6	3,9	125,22	10,7	87,20	17,4
Donostia / San Sebastian	65,8	3,0	73,4	4,2	151,62	9,2	111,29	15,8

p/p-1 Year-on-year rate of change in the last observed period (p) with respect to the same period of the previous year (p-1)

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

Date January 23, 2024

Source: Eustat Tourist accommodating establishments survey

In 2023, occupancy rates at hotel establishments for the Basque Country as a whole were 57.8% in the case of beds and 68.5% in that of rooms. In relation to 2022, the bed occupancy rate saw a rise of 3.9 percentage points and the room occupancy rate was up 5.0 points.

With regard to profitability indicators, 2023 closed with an ADR of 108.25 euros for the Basque Country as a whole and a RevPar of 74.12 euros, 9.6% and 18.2% more than the previous year.

In **December 2023**, visitor numbers at hotel establishments in the Basque Country increased by 6.6% and overnight stays were up 7.0% in year-on-year terms. The total number of visitors, which rose to 255,471, led to a total of 470,907 overnight stays.

Foreign visitors accounted for 30.9% of the total number of visitors and 31.5% of overnight stays in December 2023, slightly higher percentages than those recorded in December 2022, when visitors and overnight stays from abroad represented 28.9% and 29.1% respectively. The number of visitors and overnight stays from the rest of Spain increased in year-on-year terms by 3.7% and 3.4% respectively.

Visitors, overnight stays and average stay in hotel establishments in the Basque Country. December 2023

	Visitors		Overnight stays		Average stay	
	12/2023	m/m-12 (%)	12/2023	m/m-12 (%)	12/2023	12/2022
BASQUE COUNTRY	255.471	6,6	470.907	7,0	1,84	1,84
State origin	176.561	3,7	322.634	3,4	1,83	1,83
Foreign origin	78.910	13,8	148.273	15,6	1,88	1,85
Araba/Álava	36.190	-3,4	73.275	7,8	2,02	1,81
State origin	29.320	-5,8	57.220	2,1	1,95	1,80
Foreign origin	6.870	8,3	16.055	34,2	2,34	1,89
Vitoria-Gasteiz	29.119	-4,9	62.338	9,2	2,14	1,87
Bizkaia	120.474	9,5	217.145	7,1	1,80	1,84
State origin	87.568	7,3	153.191	4,4	1,75	1,80
Foreign origin	32.906	15,6	63.954	14,2	1,94	1,97
Bilbao	83.846	3,7	153.789	3,3	1,83	1,84
Gipuzkoa	98.807	7,2	180.487	6,5	1,83	1,84
State origin	59.673	3,6	112.223	2,8	1,88	1,89
Foreign origin	39.134	13,3	68.264	13,3	1,74	1,74
Donostia / San Sebastian	69.295	7,4	125.919	6,6	1,82	1,83

m/m12 Rate of year-on-year change in the last observed month (m) compared to the same month of the previous year (m-12)

Date January 23, 2024

Source: Eustat Tourist accommodating establishments survey

In Álava 36,190 visitors and 73,275 overnight stays were recorded, showing a 3.4% decrease in visitor numbers but a 7.8% increase in overnight stays compared to the previous December. In Bizkaia, growth reached 9.5% in the case of visitors and 7.1% in that of overnight stays, with a total of 120,474 visitors and 217,145 overnight stays. In Gipuzkoa, 98,807 visitors were recorded in the last month of 2023 (7.2% more than in December 2022) and there were 180,487 overnight stays (6.5% more than the same month of the previous year).

By provincial capital, visitor numbers fell by 4.9% in Vitoria-Gasteiz, 7.4% in San Sebastián and 3.7% in Bilbao. As regards overnight stays, compared to the previous December, there were increases in all three capitals, reaching 9.2% in Vitoria-Gasteiz, 6.6% in San Sebastián and 3.3% in Bilbao.

The average length of stay in December 2023 was 1.84 days in the Basque Country as a whole, identical to that obtained in the same month of 2022.

Bed occupancy rates and profitability in hotel establishments in the Basque Country. December 2023

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	12/2023	p.p. *	12/2023	p.p. *	12/2023	m/m-12 (%)	12/2023	m/m-12 (%)
BASQUE COUNTRY	46,8	2,5	54,5	3,7	84,57		6,5	46,05
Araba/Álava	47,0	1,1	58,2	3,2	75,24		4,2	43,78
Vitoria-Gasteiz	49,9	2,2	63,6	4,9	68,43		5,1	43,55
Bizkaia	46,8	3,9	54,9	5,2	84,63		7,9	46,42
Bilbao	51,9	3,3	60,0	5,1	89,61		7,0	53,80
Gipuzkoa	46,7	1,4	52,6	1,9	88,43		5,9	46,48
Donostia / San Sebastian	50,3	0,9	54,7	1,0	97,55		5,5	53,37
								7,4

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

m/m12 Rate of year-on-year change in the last observed month (m) compared to the same month of the previous year (m-12)

Date January 23, 2024

Source: Eustat Tourist accommodating establishments survey

Occupancy rates in December 2023 for the Basque Country as a whole stood at 46.8% for beds and 54.5% for rooms. Compared to December 2022, this was an increase of 2.5 and 3.7 percentage points respectively.

Profitability, measured using the ADR or average daily rate, reached 84.57 euros in December 2023 in the Basque Country as a whole, which was a rise of 6.5% compared to the previous December. In the case of Gipuzkoa, the ADR reached 88.43 euros, in Bizkaia this was 84.63 euros and in Álava it stood at 75.24 euros. By provincial capital, the differences were greater, given that the ADR was 97.55 euros in San Sebastián, 89.61 euros in Bilbao and, lastly, 68.43 euros in Vitoria-Gasteiz. The RevPar, or average revenue per available room, was 46.05 euros in the Basque Country in December 2023, 14.2% higher than in the same month of the previous year.

Informative note

The coverage of the ETR for Hotels in December 2023 was **81.2%**. Eustat would like to thank all establishments that participated in this survey for their effort.

Data browser for tourism in the Basque Country. Hotel establishments

For further information:

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