

## SURVEY ON TOURIST ESTABLISHMENTS (EETR) MARCH 2008

## The number of visitors in March 2008 fell by 1%

### ***Overnight stays registered a 3% increase in relation to March 2007***

164,428 visitors were registered in the hotel establishments of the A.C. of the Basque Country in March 2008; 2000 less visitors than in the same month of last year, meaning a 1% decrease, according to Eustat data. The number of visitors increased by 1% in Gipuzkoa but decreased by 6% in Álava and 1% in Bizkaia.

The number of visitors from within the state fell by 1% and the number of overseas visitors decreased by 3%. The number of visitors from within the state decreased in Álava (-2%) and Bizkaia (-1%), but remained practically unchanged in Gipuzkoa (0%). The number of foreigners increased by 2% in Gipuzkoa but decreased by 17% in Álava and 3% in Bizkaia.

Among visitors from within the state an increase was registered for those coming from Catalonia, Galicia, the community of Valencia, Castilla-La Mancha and Asturias, in particular. There was a decrease in the number of visitors from Aragon, the Balearic Islands and La Rioja. Among foreigners, those coming from Portugal, Italy, Latin America, Japan and Non EU European countries increased in number, while those coming from the United Kingdom, France, Sweden, Ireland, Finland, among others, decreased.

Overnight stays registered in March 2008 came to 307,637; a rise of 3% in relation to March of the previous year, which is to say over 8,000 more overnight stays. The inter-annual evolution of overnight stays was positive in Gipuzkoa and Bizkaia where numbers rose 7% and 1%, respectively. In Álava numbers fell by 3%.

Throughout the A.C of the Basque Country the average length of stay went from 1.80 days last year to 1.87 this past March. This index increased in all three provinces: In Gipuzkoa the length of stay rose from 1.81 to 1.92 days and in Álava and Bizkaia the length of stay rose by 3% in both cases with an average stay of 1.76 and 1.87 days for March 2008.

The degree of occupancy by place increased by 5%; going from 41.55% in March of last year to 43.50% this March. It should be noted that this increase affected Gipuzkoa with a degree of occupancy at 43.04% and Bizkaia, where the degree of occupancy went from 42.06% to 44.34%. In Álava it remained virtually unchanged, registered at 42.0%.

## Agrotourism A rise in the number of visitors (17%) and overnight stays (55%)

9,713 visitors were registered in the agrotourism establishments of the A.C. of the Basque Country in March; 17% more than in the same month of last year. Numbers increased by 11% in Álava, 22% in Bizkaia and by 12% in Gipuzkoa. The rise seen among visitors from within the state was 16% in the A.C. of the Basque Country overall: numbers increased by 11% in Álava, 22% in Bizkaia and 14% in Gipuzkoa. The number of foreigners increased by 37% in the A.C. of the Basque Country as a whole, with dramatic percentage rises. In Álava there was a 14% increase and in Bizkaia it rose 123%. In Gipuzkoa there was a 6% fall.

Overnight stays in the agrotourism establishments of the A.C. of the Basque Country came to 29,123 in March, meaning an 55% increase in relation to the same month of last year, with positive inter-annual growth rates in all three provinces. In Álava they went up 58%, in Bizkaia by 65% and in Gipuzkoa they increased 49% in relation to March 2007.

The average length of stay per visitor increased in the A.C. of the Basque Country overall in relation to March of 2007, going from 2.26 days a year earlier to 3.00 this March. This index improved in Álava (42%) with an average of 3.23 days; it also increased in Bizkaia (28%) at 2.92 days and in Gipuzkoa (32%) with an average of 2.97 days.

The degree of occupancy by place registered a 53% increase going from 18.66% last year to 28.47% this March, thanks to increases in Álava (47%), Bizkaia (62%) and Gipuzkoa (49%). Álava had a degree of occupancy by place at 22.40%, Bizkaia was at 27.29% and Gipuzkoa was at 29.80%.

## Data from 2008 Holy Week

In the period starting Monday of Holy Week and Friday of Easter week (March 17 to the 28, 2008) the number of visitors decreased by 14% and the number of overnight stays in hotels throughout the A.C. of Basque Country fell by 18.2% in relation to the previous year (April 2 to 13th, 2007).

The average length of stay during Holy Week fell from 1.98 days last year to 1.89 days in 2008. The degree of occupancy fell from 50.75% in 2007 to 43.05% in 2008.

At Agrotourism establishments during the same period there was a 5.7% decrease in the number of visitors but a 1.9% increase in overnight stays, thanks to the average length of stay increasing from 3.57 days in 2007 to 3.86 days in 2008.

During the most important days of Holy Week (Thursday, Friday and Saturday) the degree of occupancy at hotel establishments was at 69.26% and reached 89.82% at agrotourism establishments in the C.A. of the Basque Country.

**Table 1: Monthly Results**

	A.C. OF EUSKADI					ARABA/ALAVA					BIZKAIA					GIPUZKOA				
	03 2008	%	03 2007	%	Δ %	03 2008	%	03 2007	%	Δ %	03 2008	%	03 2007	%	Δ %	03 2008	%	03 2007	%	Δ %
<b>HOTEL ESTABLISHMENTS</b>																				
<b>OVERNIGHT STAYS</b>	307.637	100	299.499	100		3 43.040	100	44.349	100	-3	147.634	100	145.875	100	1	116.963	100	109.275	100	7
National	224.460	73	210.604	70	7	34.939	81	34.076	77	3	102.331	69	95.673	66	7	87.190	75	80.855	74	8
Foreigners	83.177	27	88.895	30	-6	8.101	19	10.273	23	-21	45.303	31	50.202	34	-10	29.773	25	28.420	26	5
Capital	182.561	59	183.798	61	-1	32.302	75	35.100	79	-8	91.160	62	93.126	64	-2	59.099	51	55.572	51	6
Coast	35.025	11	32.056	11	9	-	-	-	-	-	12.611	9	10.570	7	19	22.414	19	21.486	20	4
Inland	90.051	29	83.645	28	8	10.738	25	9.249	21	16	43.863	30	42.179	29	4	35.450	30	32.217	29	10
<b>ENTRY OF TRAVELLERS</b>	164.428	100	166.523	100	-1	24.483	100	25.959	100	-6	79.055	100	80.130	100	-1	60.890	100	60.434	100	1
National	119.869	73	120.518	72	-1	19.439	79	19.879	77	-2	55.397	70	55.821	70	-1	45.033	74	44.818	74	0
Foreigners	44.559	27	46.005	28	-3	5.044	21	6.080	23	-17	23.658	30	24.309	30	-3	15.857	26	15.616	26	2
Capital	97.803	59	103.542	62	-6	17.599	72	19.509	75	-10	46.928	59	50.589	63	-7	33.276	55	33.444	55	-1
Coast	15.894	10	16.555	10	-4	-	-	-	-	-	6.191	8	5.793	7	7	9.703	16	10.762	18	-10
Inland	50.731	31	46.426	28	9	6.884	28	6.450	25	7	25.936	33	23.748	30	9	17.911	29	16.228	27	10
<b>AVERAGE STAY</b>	1,87		1,80		4	1,76		1,71		3	1,87		1,82		3	1,92		1,81		6
<b>OCCUPANCY LEVEL BY PLACES</b>	43,50		41,55		5	42,00		41,92		0	44,34		42,06		5	43,04		40,75		6
Capital	47,26		47,62		-1	46,73		50,32		-7	47,82		49,47		-3	46,73		43,44		8
Coast	40,55		36,47		11	-	-	-	-	-	37,42		27,99		34	42,56		42,86		-1
Inland	38,39		33,87		13	32,19		25,65		25	40,38		34,91		16	38,28		35,76		7
<b>OCCUPANCY LEVEL BY ROOMS</b>	53,24		54,05		-1	51,74		52,34		-1	55,12		55,83		-1	51,40		52,28		-2
Capital	57,47		63,61		-10	59,06		61,75		-4	57,70		68,16		-15	56,13		57,39		-2
Coast	46,64		44,56		5	-	-	-	-	-	48,11		37,59		28	45,73		50,13		-9
Inland	48,32		42,30		14	33,54		31,97		5	52,42		42,16		24	48,19		46,51		4
<b>AGRO-TOURISM</b>																				
<b>OVERNIGHT STAYS</b>	29.123	100	18.770	100	55	5.257	100	3.331	100	58	9.383	100	5.692	100	65	14.483	100	9.747	100	49
National	26.202	90	15.698	84	67	4.867	93	2.636	79	85	8.070	86	4.815	85	68	13.265	92	8.247	85	61
Foreigners	2.921	10	3.072	16	-5	390	7	695	21	-44	1.313	14	877	15	50	1.218	8	1.500	15	-19
<b>ENTRY OF TRAVELLERS</b>	9.713	100	8.301	100	17	1.628	100	1.462	100	11	3.211	100	2.501	100	28	4.874	100	4.338	100	12
National	8.982	92	7.769	94	16	1.517	93	1.365	93	11	2.845	89	2.337	93	22	4.620	95	4.067	94	14
Foreigners	731	8	532	6	37	111	7	97	7	14	366	11	164	7	123	254	5	271	6	-6
<b>AVERAGE STAY</b>	3,00		2,26		33	3,23		2,28		42	2,92		2,28		28	2,97		2,25		32
<b>OCCUPANCY LEVEL BY PLACES</b>	28,47		18,66		53	27,40		18,62		47	27,19		16,77		62	29,80		19,99		49
<b>OCCUPANCY LEVEL BY ROOMS</b>	31,00		22,87		36	29,26		21,98		33	31,30		21,71		44	31,49		24,03		31

Source: EUSTAT

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