

SURVEY ON TOURIST ESTABLISHMENTS. MARCH 2017

## Visitors to hotel establishments in the Basque Country fell by 4.9% in March 2017

***The average daily rate (ADR) for hotels stood at 69.2 euros in March 2017, 1.2% down on the previous year***

There were 198,093 visitors registered in the hotel establishments of the Basque Country in March 2017, 10,142 down on the same month of the previous year, which is a decrease of 4.9%, according to Eustat data. The number of visitors fell by 9.9% in Gipuzkoa, 2.0% in Bizkaia, and 0.5% in Álava. When interpreting these data, it should be taken into account that Easter of 2016 was in March, whereas this year it was in April.

Furthermore, overnight stays registered in hotel establishments of the Basque Country in March 2017 reached 352,924, which was a drop of 10.2% on those registered in March of the previous year, that is, there were 40,028 fewer overnight stays. There was also a year-on-year negative trend in overnight stays in the three provinces: in Gipuzkoa they were down 15.4%, in Álava 8.8% and in Bizkaia 6.1%.

**Table 1.- Overnight stays, visitor numbers, average stay and bed occupancy rates in hotel establishments in the Basque Country. March 2017**

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness by rooms	
	03/2017	m/m-12 (%)	03/2017	m/m-12 (%)	03/2017	03/2016	03/2017	p.p.*	03/2017	p.p.*	ADR (euro)	RevPar (euro)
<b>BASQUE COUNTRY</b>	<b>352.924</b>	<b>-10,2</b>	<b>198.093</b>	<b>-4,9</b>	<b>1,78</b>	<b>1,89</b>	<b>40,1</b>	<b>-4,7</b>	<b>52,5</b>	<b>-2,3</b>	<b>69,2</b>	<b>36,4</b>
State	236.532	-15,2	137.787	-7,2	1,72	1,88	-	-	-	-	-	-
Foreigners	116.392	2,1	60.306	0,8	1,93	1,91	-	-	-	-	-	-
<b>ARABA/ÁLAVA</b>	<b>49.143</b>	<b>-8,8</b>	<b>28.943</b>	<b>-0,5</b>	<b>1,70</b>	<b>1,85</b>	<b>37,5</b>	<b>-1,2</b>	<b>48,6</b>	<b>-1,0</b>	<b>62,8</b>	<b>30,5</b>
State	38.014	-11,9	23.327	0,2	1,63	1,85	-	-	-	-	-	-
Extranjeros	11.129	3,8	5.616	-3,3	1,98	1,85	-	-	-	-	-	-
Vitoria-Gasteiz	38.297	-7,0	21.568	1,1	1,78	1,93	41,5	-0,6	54,8	-2,0	55,4	30,3
<b>BIZKAIA</b>	<b>171.062</b>	<b>-6,1</b>	<b>95.832</b>	<b>-2,0</b>	<b>1,79</b>	<b>1,86</b>	<b>40,8</b>	<b>-3,0</b>	<b>55,5</b>	<b>0,1</b>	<b>68,5</b>	<b>38,0</b>
State	111.485	-12,0	65.207	-6,0	1,71	1,83	-	-	-	-	-	-
Foreigners	59.577	7,5	30.625	7,9	1,95	1,95	-	-	-	-	-	-
Bilbao	115.314	-6,8	62.603	-5,8	1,84	1,86	47,5	-4,2	63,1	-1,0	74,3	46,9
<b>GIPUZKOA</b>	<b>132.719</b>	<b>-15,4</b>	<b>73.318</b>	<b>-9,9</b>	<b>1,81</b>	<b>1,93</b>	<b>40,2</b>	<b>-8,5</b>	<b>50,4</b>	<b>-5,9</b>	<b>72,6</b>	<b>36,6</b>
State	87.033	-20,2	49.253	-11,7	1,77	1,96	-	-	-	-	-	-
Foreigners	45.686	-4,6	24.065	-6,0	1,90	1,87	-	-	-	-	-	-
Donostia / San Sebastián	78.623	-11,0	43.798	-4,7	1,80	1,92	45,6	-7,5	56,4	-4,6	85,3	48,1

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

Source: Eustat. Survey on tourist establishments

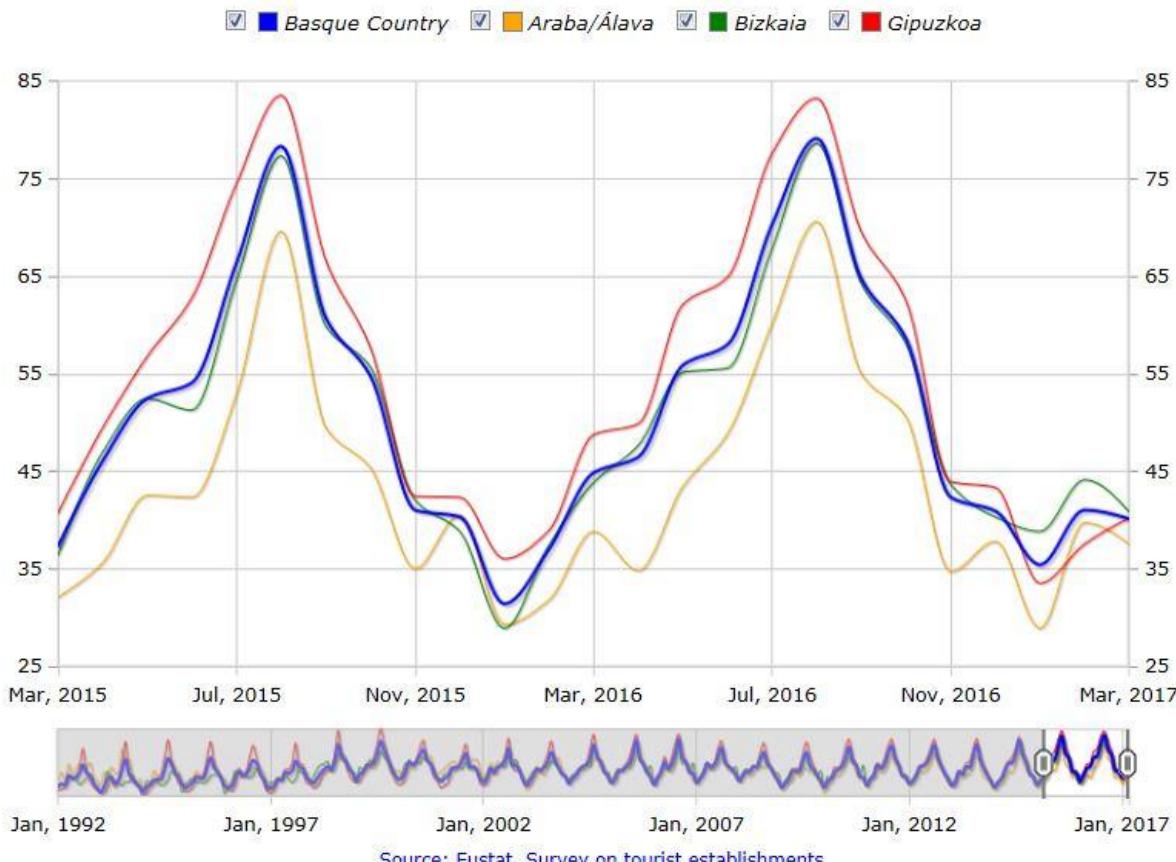
The number of visitors from within Spain fell by 7.2% in the Basque Country compared to March of the previous year, and the number of visitors from abroad increased by 0.8%. The performance varied across all three provinces. In the case of Álava, entries of Spanish visitors saw a 0.2%

upturn, but a 3.3% decrease in the case of foreign visitors. In Bizkaia, the number of Spanish visitors was down by 6.0%, whereas the number of visitors from abroad rose by 7.9%. In Gipuzkoa there was a decrease both in Spanish visitor numbers, of 11.7%, and in the number of foreign visitors, which fell by 6.0%.

This March the average length of stay was 1.78 days, below the average length of stay of 1.89 days that was registered in March 2016. The average length of stay was lower in all three provinces. In Álava there was a drop of 1.85 days last year to 1.70 days in March of this year; in Bizkaia it fell from 1.86 days to 1.79 days; and finally in Gipuzkoa, the average length of stay in March 2016 was 1.93 days compared to 1.81 days this March.

There was a downturn of 4.7 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 44.8% in March 2016 to 40.1% in March this year. In Álava there was a drop of 1.2 percentage points, where it went from 38.7% to 37.5% this March. Bizkaia saw a decrease of 3.0 percentage points, going from a bed occupancy rate of 43.8% in March 2016 to a rate of 40.8% this March. In Gipuzkoa the occupancy rate fell 8.5 percentage points, going from 48.7% to 40.2%.

**Evolution of the bed occupancy rate of the hotel establishments of the Basque Country by province (%)**



The occupancy rate per room also registered a downturn, with a 2.3 percentage point increase for the Basque Country overall, where it stood at 52.5%. In Álava it was down by one percentage point, standing at 48.6%; in Bizkaia it increased by 0.1 percentage points, reaching 55.5%. Meanwhile, in Gipuzkoa there was a drop of 5.9 percentage points, registering 50.4% occupancy per room.

The highest hotel bed occupancy rate in March this year was in Bilbao (47.5%), followed by Donostia/San Sebastián (45.6%) and Vitoria-Gasteiz (41.5%).

Taking into account the day of the week, at weekends there was a higher occupancy in the Basque Country as a whole in March 2017, with 53.4% of places occupied, whilst the registered occupancy stood at 34.6% on weekdays.

Finally, 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 March 2017, 1.2% up on the year before. The average rate stood at 62.8 euros in Álava, where it decreased by 2.5%; 68.5 euros in Bizkaia, with an increase of 3.9%, and 72.6 euros in Gipuzkoa, where it dropped 6.1%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 36.4 euros in March 2017, a 5.3% decrease on March 2016. One again there were provincial differences: in Álava, the RevPAR stood at 30.5 euros, 38.0 euros in Bizkaia, and 36.6 euros in Gipuzkoa.

***In rural accommodation, visitor numbers decreased by 9.5% and overnight stays were down 34.2% in March 2017***

There were 9,300 visitors to rural tourism establishments in the Basque Country in March, 9.5% fewer than the same month of the previous year. By province, the number of visitors was up by 44.1% in Álava, in Bizkaia there was a drop of 26.8%, and in Gipuzkoa there was a decrease of 16.4%. The 761 visitors originating from abroad signified an increase of 17.1% with regards to those received a year ago and represented 8.2% of the total number of visitors. For its part, the number of visitors from within Spain fell by 11.3%.

Rural tourism establishments and country cottages in the Basque Country recorded a total of 17,943 overnight stays in March, with a decrease of 34.2% with respect to the same month of the previous year. At provincial level, they were down 28.9% in Álava, down by 41.1% in Bizkaia and also fell in Gipuzkoa by 33.0%.

The bed occupancy rate stood at 14.6% with a fall of 8.1 percentage points from the figures obtained in March 2016. Álava also recorded a decrease of 5.8 percentage points, with a bed occupancy rate of 14.3%. In Bizkaia, the occupancy rate stood at 10.9%, resulting in a decrease of 8.6 percentage points in relation to March 2016, whereas in Gipuzkoa rates fell by 8.8 percentage points, reaching an occupancy rate of 17.0% this January.

Finally, the average length of stay per visitor decreased this March with respect to March 2016, going from 2.65 days a year ago to 1.93 this last month.

**Table 2.- Overnight stays, visitor numbers, average stay and occupancy rates in rural accommodation in the Basque Country. March 2017**

	Overnight stays		Visitors		Average length		Degree of occupation by places (%)	
	03/2017	m/m-12 (%)	03/2017	m/m-12 (%)	03/2017	03/2016	03/2017	p.p.*
<b>BASQUE COUNTRY</b>	<b>17.943</b>	<b>-34,2</b>	<b>9.300</b>	<b>-9,5</b>	<b>1,93</b>	<b>2,65</b>	<b>14,6</b>	<b>-8,1</b>
Araba/Álava	3.864	-28,9	2.368	44,1	1,63	3,31	14,3	-5,8
Bizkaia	4.089	-41,1	2.044	-26,8	2,00	2,49	10,9	-8,6
Gipuzkoa	9.990	-33,0	4.888	-16,4	2,04	2,55	17,0	-8,8

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

**Source: Eustat. Survey on tourist establishments**

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