

## SURVEY ON TOURIST ESTABLISHMENTS. AUGUST 2017

## Visitors to hotel establishments in the Basque Country fell by 0.3% in August 2017

**The average daily rate (ADR) for hotels stood at 105.0 euros in August 2017, 6.7% up on the previous year**

There were 331,979 visitors registered in the hotel establishments of the Basque Country in August 2017, 1,064 down on the same month of the previous year, which is a decrease of 0.3%, according to Eustat data. The number of visitors was up by 1.2% in Gipuzkoa, whereas there was a drop of 2.8% in Álava, and 0.7% in Bizkaia.

Furthermore, overnight stays registered in hotel establishments of the Basque Country in August 2017 reached 713,065, which was a drop of 2.2% on those registered in August of the previous year, that is, there were 15,960 fewer overnight stays. The year-on-year figures for overnight stays were negative in the three provinces. In Bizkaia they were down by 3.1%, in Álava 2.2% and in Gipuzkoa 1.1%.

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

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness by rooms	
	08/2017	m/m-12 (%)	08/2017	m/m-12 (%)	08/2017	08/2016	08/2017	p.p.*	08/2017	p.p.*	ADR (euro)	RevPar (euro)
	<b>713.065</b>	<b>-2,2</b>	<b>331.979</b>	<b>-0,3</b>	<b>2,15</b>	<b>2,19</b>	<b>77,7</b>	<b>-1,3</b>	<b>83,6</b>	<b>-1,5</b>	<b>105,0</b>	<b>87,7</b>
<b>BASQUE COUNTRY</b>												
State	407.189	-7,3	173.866	-5,6	2,34	2,38	-	-	-	-	-	-
Foreigners	305.876	5,5	158.113	6,2	1,93	1,95	-	-	-	-	-	-
<b>ARABA/ÁLAVA</b>	<b>99.416</b>	<b>-2,2</b>	<b>52.177</b>	<b>-2,8</b>	<b>1,91</b>	<b>1,89</b>	<b>72,8</b>	<b>2,3</b>	<b>77,2</b>	<b>0,7</b>	<b>77,0</b>	<b>59,5</b>
State	67.987	-1,6	31.036	-1,4	2,19	2,19	-	-	-	-	-	-
Extranjeros	31.429	-3,7	21.141	-4,8	1,49	1,47	-	-	-	-	-	-
Vitoria-Gasteiz	69.162	-3,9	36.347	-3,0	1,90	1,92	73,6	1,7	79,2	-0,8	68,5	54,2
<b>BIZKAIA</b>	<b>332.193</b>	<b>-3,1</b>	<b>156.698</b>	<b>-0,7</b>	<b>2,12</b>	<b>2,17</b>	<b>77,0</b>	<b>-1,5</b>	<b>83,9</b>	<b>-1,3</b>	<b>87,1</b>	<b>73,0</b>
State	185.540	-11,1	81.109	-8,3	2,29	2,36	-	-	-	-	-	-
Foreigners	146.653	9,3	75.589	9,1	1,94	1,94	-	-	-	-	-	-
Bilbao	201.909	-3,2	98.185	-1,2	2,06	2,10	80,9	-2,5	87,1	-2,3	97,5	84,9
<b>GIPUZKOA</b>	<b>281.456</b>	<b>-1,1</b>	<b>123.104</b>	<b>1,2</b>	<b>2,29</b>	<b>2,34</b>	<b>80,4</b>	<b>-2,8</b>	<b>85,5</b>	<b>-2,8</b>	<b>136,1</b>	<b>116,4</b>
State	153.662	-4,8	61.721	-3,8	2,49	2,51	-	-	-	-	-	-
Foreigners	127.794	3,7	61.383	6,9	2,08	2,15	-	-	-	-	-	-
Donostia / San Sebastián	156.240	-0,5	67.126	4,3	2,33	2,44	85,2	-2,6	91,4	-1,2	175,2	160,1

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

Source: Eustat. Survey on tourist establishments

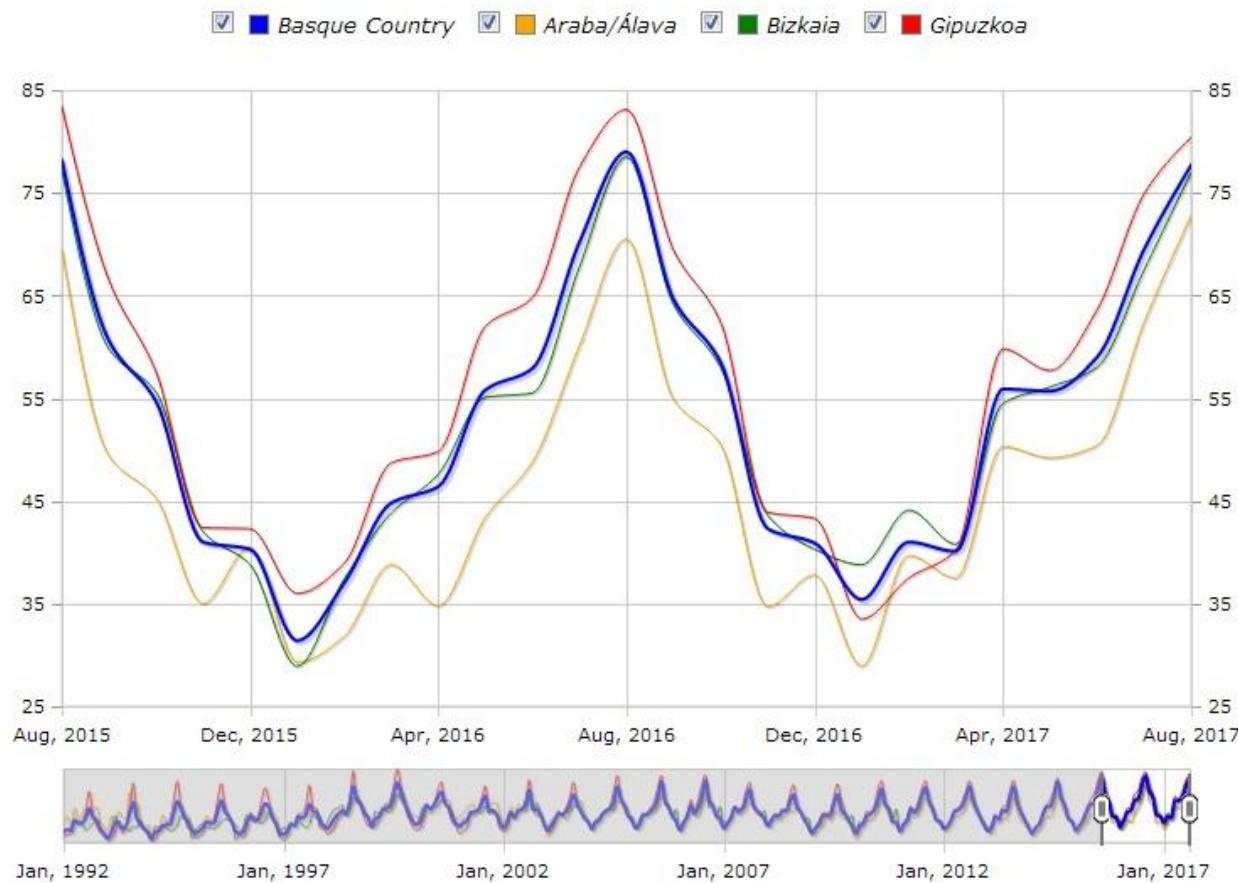
The number of visitors from within Spain registered a decrease in August 2017, compared to August of the previous year, with a drop of 5.6% in the Basque Country as a whole. However, the number of visitors from abroad increased by 6.2%. In the case of Álava, visitor numbers saw a downturn in both cases, of 1.4% for Spanish visitors and 4.8% in the case of foreign visitors. In

Bizkaia, the number of Spanish visitors was down by 8.3%, whereas the number of visitors from abroad rose by 9.1%. In Gipuzkoa there was a decrease in Spanish visitor numbers of 3.8%, and the number of foreign visitors rose by 6.9%.

This August the average length of stay was 2.15 days, below the average length of stay of 2.19 days registered in August 2016. However, in Álava there was an increase from 1.89 days last year to 1.91 days in August of this year; in Bizkaia there was a drop from 2.17 days to 2.12 days; and finally in Gipuzkoa, the average length of stay also fell from 2.34 days in August 2016 to 2.29 days in August 2017.

There was a decrease of 1.3 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 79.0% in August 2016 to 77.7% in August 2017. In Álava there was a rise of 2.3 percentage points, where it went from 70.5% to 72.8% this August. Bizkaia saw an increase of 1.5 percentage points, going from a bed occupancy rate of 78.5% in August 2016 to a rate of 77.0% in August 2017. In Gipuzkoa the occupancy rate fell 2.8 percentage points, going from 83.2% to 80.4%.

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



Source: Eustat. Survey on tourist establishments

The occupancy rate per room also registered a decrease, with a 1.5 percentage point drop for the Basque Country overall, reaching 83.6%. In Álava it was up by 0.7 percentage points, standing at

77.2%, and in Bizkaia it decreased by 1.3 percentage points, reaching 83.9%. Meanwhile, in Gipuzkoa there was a drop of 2.8 percentage points, registering 85.5% occupancy per room.

The highest hotel bed occupancy rate in August this year was in Gipuzkoa Costa (85.8%), followed by Donostia-San Sebastián (85.2%) and Bilbao (80.9%).

Taking into account the day of the week, at weekends there was a higher occupancy in the Basque Country as a whole in August 2017, with 82.5% of places occupied, whilst the registered occupancy stood at 76.0% 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 105.0 euros in August 2017, 6.7% up on the year before. The average rate stood at 77.0 euros in Álava, where it increased by 3.2%; 87.1 euros in Bizkaia, with an increase of 10.0%, and 136.1 euros in Gipuzkoa, where it went up by 4.5%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 87.7 euros in August 2017, a 4.8% increase on August 2016. The RevPAR stood at 59.5 euros in Álava, 73.0 euros in Bizkaia, and 116.4 euros in Gipuzkoa.

#### **The occupancy rate per room during the festivals of the three Basque capitals varied between 86.4% in Vitoria-Gasteiz and 94.1% in Donostia-San Sebastián**

In Vitoria-Gasteiz there were 8,258 visitors and 15,146 overnight stays during the 2017 Virgen Blanca festival, over the dates of 4 to 9 August 2017 (6 nights), with an occupancy rate per bed of 82.1% and per room of 86.4%. Compared to 2016, visitor numbers increased by 5.3% and overnight stays by 0.4%.

In Donostia-San Sebastián, during the Aste Nagusia celebrations, between 12 and 19 August 2017 (8 nights), 17,907 visitors and 42,016 overnight stays were recorded, with an occupancy rate per room of 88.5% and per bed of 94.1%. Compared to 2016, when the festival was held between 13 and 20 August (8 nights), visitor numbers increased in Donostia-San Sebastián by 5.7% whilst overnight stays decreased by 1.4%.

Visitor numbers during the 2017 Bilbao Aste Nagusia Festival increased to 27,178 in the hotel establishments of the capital of Bizkaia. These were visits that lasted from 19 to 27 August 2017 (9 nights). In this same period, the total number of overnight stays was 57,836, with an occupancy rate per bed of 80.2% and per room of 87.1%. Compared to 2016, when the Semana Grande (Big Week) festival was held between 20 and 28 August (9 nights), visitor numbers increased by 0.5%, but overnight stays were down by 1.8%.

#### **In rural accommodation, visitor numbers decreased by 1.8% and overnight stays fell by 7.2% in August 2017**

There were 24,070 visitors to rural accommodation in the Basque Country in August, 1.8% less than the same month of the previous year. By province, in Álava the number of visitors fell by 14.4%, but in Gipuzkoa there was a rise of 0.6%, and in Bizkaia there was an increase of 1.2%. The 4,681 visitors originating from abroad signified a decrease of 8.2% with regards to those received a year ago and represented 19.4% of the total number of visitors. For its part, the number of visitors from within Spain fell by 0.2%.

Rural tourism establishments and country cottages in the Basque Country recorded a total of 88,783 overnight stays in August, with a decrease of 7.2% with respect to the same month of the previous year. At provincial level, there were decreases in all three territories. In Álava they were down by 18.5%, in Bizkaia there was a drop of 10.5% and in Gipuzkoa they decreased by 2.2%.

The bed occupancy rate stood at 62.8% with a fall of 8.0 percentage points from the figures obtained in August 2016. Álava also recorded a decrease of 8.8 percentage points, with a bed occupancy rate of 37.7%. In Bizkaia the occupancy rate was 64.9%, which meant a decrease of 8.8 percentage points in relation to August 2016, and Gipuzkoa saw a fall of 7.8 percentage points to an occupancy rate in August 2017 of 71.9%.

Finally, the average length of stay per visitor decreased this August with respect to August 2016, going from 3.90 days a year ago to 3.69 this last month.

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

	Overnight stays		Visitors		Average length		Degree of occupation by places (%)	
	08/2017	m/m-12 (%)	08/2017	m/m-12 (%)	08/2017	08/2016	08/2017	p.p.*
<b>BASQUE COUNTRY</b>	<b>88.783</b>	<b>-7,2</b>	<b>24.070</b>	<b>-1,8</b>	<b>3,69</b>	<b>3,90</b>	<b>62,8</b>	<b>-8,0</b>
Araba/Álava	10.818	-18,5	3.668	-14,4	2,95	3,10	37,7	-8,8
Bizkaia	28.000	-10,5	7.896	1,2	3,55	4,01	64,9	-8,8
Gipuzkoa	49.965	-2,2	12.506	0,6	4,00	4,11	71,9	-7,8

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

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

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