

## SURVEY ON TOURIST ESTABLISHMENTS. APARTMENTS. MARCH 2018

## Visitors to hotel establishments in the Basque Country increased by 16.2% in March 2018

***In the three central Easter days (Thursday to Saturday), the drop in the occupancy rate per room was widespread***

There were 230,273 visitors registered in the hotel establishments of the Basque Country in March 2018, 32,180 up on the same month of the previous year, which is an increase of 16.2%. The number of visitors was up in Álava by 10.7%, in Bizkaia there was an increase of 13.0%, and in Gipuzkoa, 22.7%, **although it should be taken into account when analysing these data that this year Easter fell in March, and last year it was in April.**

Furthermore, overnight stays registered in hotel establishments of the Basque Country in March 2018 reached 440,918, which was an increase of 24.9% on those registered in March of the previous year; that is, there were 87,994 more overnight stays. The year-on-year figures for overnight stays were also positive in the three provinces. They were up by 16.1% in Álava, by 23.3% in Bizkaia and 30.3% in Gipuzkoa.

**Table 1.- Overnight stays, visitor numbers, average stay and bed occupancy rates in hotel establishments in the Basque Country. March 2018**

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness by rooms	
	03/2018	m/m-12 (%)	03/2018	m/m-12 (%)	03/2018	03/2017	03/2018	p.p.*	03/2018	p.p.*	ADR (euro)	RevPar (euro)
<b>BASQUE COUNTRY</b>	<b>440.918</b>	<b>24,9</b>	<b>230.273</b>	<b>16,2</b>	<b>1,91</b>	<b>1,78</b>	<b>48,7</b>	<b>8,6</b>	<b>58,9</b>	<b>6,4</b>	<b>76,6</b>	<b>45,1</b>
State	296.486	25,3	159.006	15,4	1,86	1,72	-	-	-	-	-	-
Foreigners	144.432	24,1	71.267	18,2	2,03	1,93	-	-	-	-	-	-
<b>ARABA/ÁLAVA</b>	<b>57.048</b>	<b>16,1</b>	<b>32.050</b>	<b>10,7</b>	<b>1,78</b>	<b>1,70</b>	<b>43,7</b>	<b>6,2</b>	<b>54,1</b>	<b>5,4</b>	<b>69,8</b>	<b>37,8</b>
State	45.504	19,7	25.802	10,6	1,76	1,63	-	-	-	-	-	-
Extranjeros	11.544	3,7	6.248	11,3	1,85	1,98	-	-	-	-	-	-
Vitoria-Gasteiz	42.699	11,5	22.971	6,5	1,86	1,78	46,0	4,5	58,7	3,9	58,9	34,5
<b>BIZKAIA</b>	<b>210.972</b>	<b>23,3</b>	<b>108.274</b>	<b>13,0</b>	<b>1,95</b>	<b>1,79</b>	<b>49,3</b>	<b>8,5</b>	<b>60,8</b>	<b>5,4</b>	<b>74,8</b>	<b>45,5</b>
State	137.971	23,8	73.696	13,0	1,87	1,71	-	-	-	-	-	-
Foreigners	73.001	22,5	34.578	12,9	2,11	1,95	-	-	-	-	-	-
Bilbao	133.880	16,1	70.826	13,1	1,89	1,84	54,2	6,7	66,7	3,6	81,5	54,4
<b>GIPUZKOA</b>	<b>172.898</b>	<b>30,3</b>	<b>89.949</b>	<b>22,7</b>	<b>1,92</b>	<b>1,81</b>	<b>49,8</b>	<b>9,6</b>	<b>58,3</b>	<b>7,9</b>	<b>81,1</b>	<b>47,3</b>
State	113.011	29,8	59.508	20,8	1,90	1,77	-	-	-	-	-	-
Foreigners	59.887	31,1	30.441	26,5	1,97	1,90	-	-	-	-	-	-
Donostia / San Sebastián	98.937	25,8	52.771	20,5	1,87	1,80	54,9	9,2	63,9	7,5	99,1	63,3

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

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

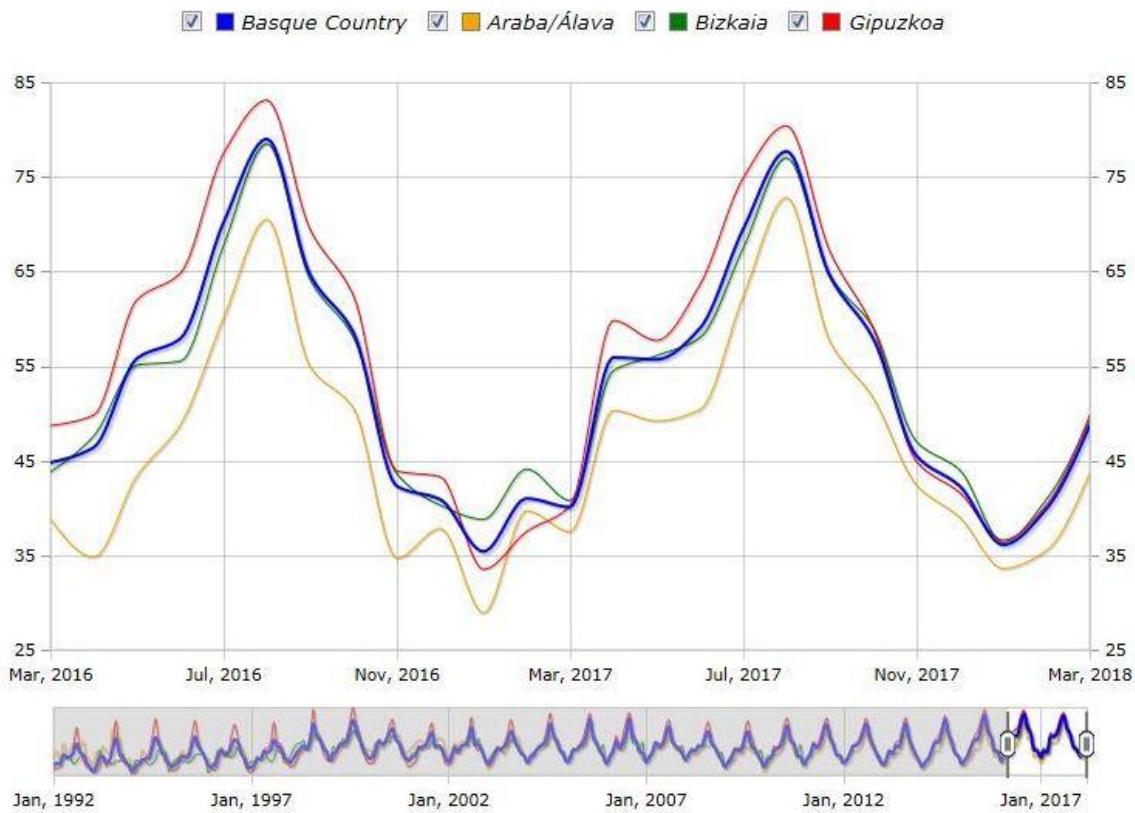
The number of visitors from within Spain rose by 15.4% in the Basque Country compared to March of the previous year, whilst the number of visitors from abroad rose by 18.2%. Álava registered a 10.6% increase in visitors from Spain, and a 11.3% increase in foreign visitors. In Bizkaia the number of Spanish visitors was up by 13.0%, whereas the number of visitors from abroad rose by

12.9%. In Gipuzkoa there was an increase in Spanish visitor numbers of 20.8%, and the number of foreign visitors rose by 26.5%.

The average length of stay in March was 1.91 days, compared to the 1.78 days average stay registered in March 2017. In Álava there was an increase from 1.70 days last year to 1.78 days in March this year; in Bizkaia there was also a rise from 1.79 days to 1.95 days; and for its part, the average length of stay in Gipuzkoa increased from 1.81 days in March 2017 to 1.92 days this March.

There was an upturn of 8.6 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 40.1% in March 2017 to 48.7% in March this year. Álava experienced an increase of 6.2 percentage points, going from 37.5% to 43.7%. In Bizkaia it was up 8.5 percentage points, going from 40.8% in March 2017 to 49.3% this March. In Gipuzkoa the occupancy rate rose 9.6 percentage points, from the 40.2% reached in March 2017 to 49.8% this March.

#### 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 an upward trend, with a 6.4 percentage point increase for the Basque Country overall, reaching 58.9%. In Álava it was up by 5.4 percentage points, standing at 54.1%; in Bizkaia it rose by 5.4 percentage points to reach 60.8%; whereas in Gipuzkoa it increased by 7.9 percentage points, standing at 58.3% occupancy per room.

The highest hotel bed occupancy rate this March was in Donostia/San Sebastián (54.9%), followed by Bilbao (54.2%) and Gipuzkoa Costa (48.0%).

Taking into account the day of the week, at weekends there was a higher occupancy in the Basque Country as a whole in March 2018, with 60.7% of places occupied, whilst the registered occupancy stood at 42.8% 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 76.6 euros in March 2018, 10.6% up on the year before. The average rate stood at 69.8 euros in Álava, where it rose by 11.3%; 74.8 euros in Bizkaia, with an increase of 9.2%, and 81.1 euros in Gipuzkoa, where it rose 11.8%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 45.1 euros in March 2018, a 24.0% upturn on March 2017. The RevPAR stood at 37.8 euros in Álava, 45.5 euros in Bizkaia, and 47.3 euros in Gipuzkoa.

***In rural accommodation, visitor numbers increased by 26.6% and overnight stays rose by 52.0% in March 2018***

There were 11,776 visitors to rural accommodation in the Basque Country, 26.6% more than the same month of the previous year. By province, in Álava the number of visitors was down by 6.0%, in Bizkaia there was an increase of 31.0%, and in Gipuzkoa there was a rise of 40.6%.

The 1,368 visitors originating from abroad signified a rise of 79.8% with regards to those received a year ago and represented 11.6% of the total number of visitors. For its part, the number of visitors from within Spain rose by 21.9%.

Rural tourism establishments and country cottages in the Basque Country recorded a total of 27,281 overnight stays in March 2018, with an increase of 52.0% with respect to the same month of the previous year. By province, in Álava they were up by 37.4%, in Gipuzkoa, 49.3% and in Bizkaia, by 72.5%.

The bed occupancy rate stood at 21.5% with a rise of 6.9 percentage points compared to the figures obtained in March 2017. In Álava it increased by 4.1 percentage points, standing at 18.4%. In Bizkaia, the occupancy rate stood at 18.5%, with an increase of 7.5 percentage points in relation to March 2017, whereas in Gipuzkoa it rose by 7.9 percentage points, reaching an occupancy rate of 24.9% this March.

Finally, the average length of stay per visitor increased this March, going from 1.93 days a year ago to 2.32 this last month.

**Table 2.- Overnight stays, visitor numbers, average stay and occupancy rates in rural accommodation in the Basque Country. March 2018**

	Overnight stays		Visitors		Average length		Degree of occupation by places (%)	
	03/2018	m/m-12 (%)	03/2018	m/m-12 (%)	03/2018	03/2017	03/2018	p.p.*
	<b>BASQUE COUNTRY</b>		<b>27.281</b> <b>52,0</b>		<b>11.776</b> <b>26,6</b>		<b>2,32</b> <b>1,93</b>	
Araba/Álava	5.309	37,4	2.227	-6,0	2,38	1,63	18,4	4,1
Bizkaia	7.055	72,5	2.678	31,0	2,63	2,00	18,5	7,5
Gipuzkoa	14.917	49,3	6.871	40,6	2,17	2,04	24,9	7,9

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

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

## ***Easter Balance for the period comprising Thursday to Saturday***

### ***The occupancy rate by room during Easter was 81.4% in hotel establishments in the Basque Country, 7.8 percentage points fewer than the year before***

The number of visitors to Basque hotel establishments rose to 34,123 during the period from Thursday 29 to Saturday 31 March (3 nights) in Easter 2018. This represents a 6.4% drop in visitors compared to the same Easter period in 2017, from Thursday 13 April to Saturday 15 April. Of the total number of visitors, 9,271 (27.2%) were from abroad and 24,852 were from within Spain. Both the number of visitors from within Spain and those from abroad was down by 6.4% compared with numbers from the previous year.

Álava saw 4,791 visitors, 22.6% less than the previous year; Bizkaia 15,946 visitors, 4.8% less; and Gipuzkoa saw 13,386 visitors, which was a 0.9% decrease.

In this same period, the total number of overnight stays in the Basque Country was 71,674, which was a decrease of 6.7% compared with 2017. Overnight stays dropped by 15.5% in Álava to 9,792; in Bizkaia they were down 4.9% to 34,095, and they fell 5.6% in Gipuzkoa to 27,787 overnight stays.

During Easter 2018, the occupancy rate by room was 81.4%, 7.8 percentage points less than for Easter 2017. By province, there was an occupancy rate of 77.4% in Álava, 83.0% in Bizkaia and 80.9% in Gipuzkoa, which translates as decrease in occupancy rates of 12.2 percentage points in Álava, 7.3 percentage points in Bizkaia and 6.9 percentage points in Gipuzkoa compared with the rate for Easter 2017.

In the capitals, the highest occupancy rate per room was in Rioja Alavesa, with an occupancy rate of 97.5%, 1.9 percentage points more than Easter the previous year. This was followed by Donostia-San Sebastián, which had a bed occupancy rate of 87.5%, 7.0 percentage points down on 2017, with Bilbao attaining an occupancy rate of 87.2%, 5.7 percentage points down.

### ***The occupancy rate per room during Easter was 79.2% in the rural tourism establishments of the Basque Country***

The number of visitors during Easter increased to 3,120 in the rural tourism establishments in the Basque Country. Álava saw 654 visitors, 12.3% fewer than in the same period in 2017; Bizkaia saw 974 visitors, 16.4% less, and there were 1,492 fewer visitors in Gipuzkoa, 4.8% down on the previous year.

During the same period, overnight stays dropped by 3.0% to 10,192, and the Basque Country as a whole experienced downturns in all three provinces.

The occupancy rate per room was 79.2% for the Basque Country as a whole, 80.5% in Álava, 74.5% in Bizkaia and 81.8% in Gipuzkoa.

**Table 3. Visitor numbers, overnight stays and occupancy rates of hotel establishments and rural accommodation in the Basque Country by origin and geographical area. Holy Week(\*). 2018**

	Visitors		Overnight stays		Degree of occupation by rooms	
	2018	Δ%	2018	Δ%	2018	p.p.
<b>HOTELS</b>						
<b>BASQUE COUNTRY</b>	<b>34.123</b>	<b>-6,4</b>	<b>71.674</b>	<b>-6,7</b>	<b>81,4</b>	<b>-7,8</b>
State	24.852	-6,4	53.642	-7,6	-	-
Foreigners	9.271	-6,4	18.032	-4,1	-	-
<b>ARABA/ÁLAVA</b>	<b>4.791</b>	<b>-22,6</b>	<b>9.792</b>	<b>-15,5</b>	<b>77,4</b>	<b>-12,2</b>
Vitoria-Gasteiz	3.370	-23,3	6.861	-13,5	77,6	-12,1
<b>BIZKAIA</b>	<b>15.946</b>	<b>-4,8</b>	<b>34.095</b>	<b>-4,9</b>	<b>83,0</b>	<b>-7,3</b>
Bilbao	9.780	1,3	20.442	-3,8	87,2	-5,7
<b>GIPUZKOA</b>	<b>13.386</b>	<b>-0,9</b>	<b>27.787</b>	<b>-5,6</b>	<b>80,9</b>	<b>-6,9</b>
Donostia / San Sebastián	7.729	3,4	15.481	-5,2	87,5	-7,0
<b>RURAL ACCOMMODATION</b>						
BASQUE COUNTRY	3.120	-10,3	10.192	-3,0	79,2	2,4
ARABA/ÁLAVA	654	-12,3	2.174	-0,5	80,5	3,2
BIZKAIA	974	-16,4	2.955	-7,8	74,5	-0,1
GIPUZKOA	1.492	-4,8	5.063	-1,1	81,8	3,8

(\*) Easter: Thursday to Saturday (3 nights)

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

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

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