

SURVEY ON TOURIST ESTABLISHMENTS. APRIL 2018

Visitors to hotel establishments in the Basque Country fell by 1.0% in April 2018

The average daily rate (ADR) for hotels stood at 82.5 euros in April 2018, 2.2% up on the previous year

There were 255,590 visitors registered in the hotel establishments of the Basque Country in April 2018, 2,698 down on the same month of the previous year, which is a decrease of 1.0%, according to Eustat data. The number of visitors rose by 2.8% in Álava, 1.2% in Gipuzkoa, and 0.4% in Bizkaia. **When interpreting these data, it should be taken into account that Easter of 2017 was in April and this year, except for Resurrection Sunday and Easter Monday, it fell in March.**

Furthermore, overnight stays registered in hotel establishments of the Basque Country in April 2018 reached 487,418, which was an increase of 0.1% on those registered in April of the previous year, that is, there were 532 more overnight stays. There was a year-on-year upward trend in overnight stays in Bizkaia, which registered an increase of 2.5%. Meanwhile, in Álava and Gipuzkoa figures were down 2.2% and 1.8%, respectively.

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

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness by rooms	
	04/2018	m/m-12 (%)	04/2018	m/m-12 (%)	04/2018	04/2017	by places		by rooms		ADR (euro)	RevPar (euro)
							04/2018	p.p.*	04/2018	p.p.*		
BASQUE COUNTRY	487.418	0,1	255.590	-1,0	1,91	1,89	54,9	-1,0	66,2	0,8	82,5	54,6
State	281.095	-8,2	149.806	-7,6	1,88	1,89	-	-	-	-	-	-
Foreigners	206.323	14,2	105.784	10,0	1,95	1,88	-	-	-	-	-	-
ARABA/ÁLAVA	63.722	-2,2	35.629	-2,8	1,79	1,78	49,4	-0,9	59,8	1,0	69,2	41,4
State	46.143	-5,1	25.665	-5,2	1,80	1,80	-	-	-	-	-	-
Extranjeros	17.579	6,5	9.964	3,9	1,76	1,72	-	-	-	-	-	-
Vitoria-Gasteiz	47.625	1,9	25.755	0,7	1,85	1,83	52,7	0,6	65,1	2,5	56,1	36,5
BIZKAIA	229.521	2,5	118.199	-0,4	1,94	1,89	55,3	0,8	68,9	2,6	78,9	54,3
State	129.238	-6,9	68.405	-7,5	1,89	1,88	-	-	-	-	-	-
Foreigners	100.283	17,6	49.794	11,5	2,01	1,91	-	-	-	-	-	-
Bilbao	148.660	3,3	75.293	1,5	1,97	1,94	62,3	1,3	76,8	3,4	86,7	66,7
GIPUZKOA	194.175	-1,8	101.762	-1,2	1,91	1,92	56,4	-3,4	65,4	-1,4	91,4	59,8
State	105.714	-11,0	55.736	-8,7	1,90	1,95	-	-	-	-	-	-
Foreigners	88.461	12,0	46.026	9,7	1,92	1,88	-	-	-	-	-	-
Donostia / San Sebastián	116.450	-2,3	60.941	-0,5	1,91	1,95	64,2	-4,8	73,5	-3,4	114,7	84,4

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

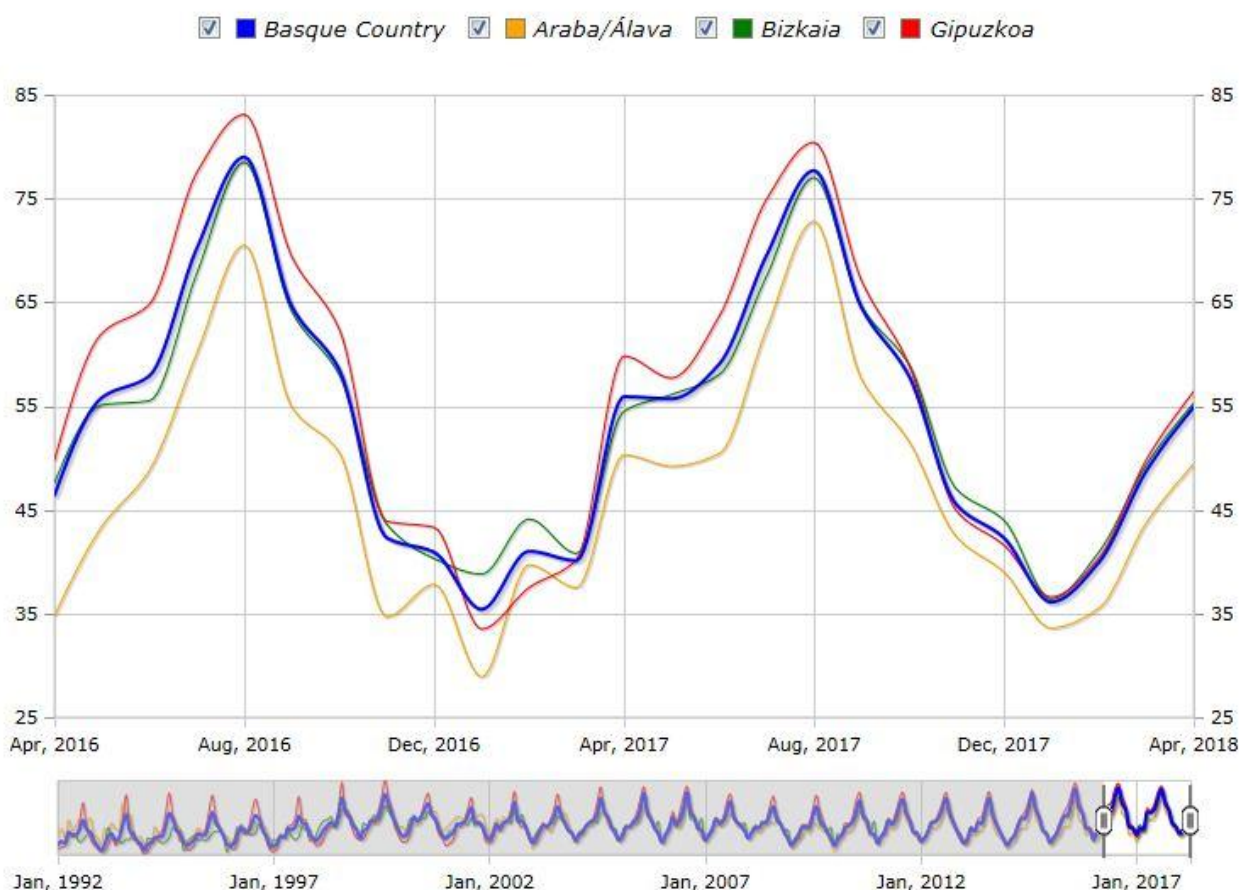
Source: Eustat. Survey on tourist establishments

The number of visitors from within Spain fell by 7.6% in the Basque Country compared to April of the previous year, and the number of visitors from abroad increased by 10.0%. In the case of Álava, entries of Spanish visitors saw a 5.2% downturn and a 3.9% increase in the case of foreign visitors. In Bizkaia, the number of Spanish visitors was down by 7.5%, whereas the number of visitors from abroad rose by 11.5%. In Gipuzkoa there was also a decrease in Spanish visitor numbers of 8.7%, whereas the number of foreign visitors rose by 9.7%.

This April the average length of stay was 1.91 days, above the average length of stay of 1.89 days that was registered in April 2017. In Álava there was an increase from 1.78 days last year to 1.79 days in April of this year; in Bizkaia it rose from 1.89 days to 1.94 days; but in Gipuzkoa, the average length of stay fell from 1.92 days in April 2017 to 1.91 days in April 2018.

There was a decrease of 1.0 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 55.9% in April 2017 to 54.9% in April this year. In Álava there was a drop of 0.9 percentage points, where it went from 50.3% to 49.4% this April. Bizkaia saw an increase of 0.8 percentage points, going from a bed occupancy rate of 54.5% in April 2017 to a rate of 55.3% in April 2018. In Gipuzkoa the occupancy rate was down 3.4 percentage point, going from 59.8% to 56.4%.

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 an increase, with a 0.8 percentage point rise for the Basque Country overall, reaching 66.2%. In Álava it was up by 1 percentage point, standing at 59.8%, and in Bizkaia it increased by 2.6 percentage points, reaching 68.9%. Meanwhile, in Gipuzkoa there was a drop of 1.4 percentage points, registering 65.4% occupancy per room.

The highest hotel bed occupancy rate in April this year was in Donostia/San Sebastián (64.2%), followed by Bilbao (62.3%) and Gipuzkoa Costa (54.9%).

Taking into account the day of the week, at weekends there was a higher occupancy in the Basque Country as a whole in April 2018, with 65.0% of places occupied, whilst the registered occupancy stood at 51.1% 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 82.5 euros in April 2018, 2.2% up on the year before. The average rate stood at 69.2 euros in Álava, where it fell by 1.2%; 78.9 euros in Bizkaia, with an increase of 5.6%, and 91.4 euros in Gipuzkoa, where it dropped slightly, by 0.1%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 54.6 euros in April 2018, a 3.5% upturn on April 2017. The RevPAR stood at 41.4 euros in Álava, 54.3 euros in Bizkaia, and 59.8 euros in Gipuzkoa.

In rural accommodation, visitor numbers decreased by 8.4% and overnight stays were down 20.2% in April 2018

There were 14,655 visitors to rural accommodation in the Basque Country in April, 8.4% less than the same month of the previous year. By province, in Álava the number of visitors was down by 26.5%, in Bizkaia there was a drop of 16.2%, and in Gipuzkoa there was an increase of 3.3%. The 2,722 visitors originating from abroad signified a rise of 35.8% with regards to those received a year ago and represented 18.6% of the total number of visitors. For its part, the number of visitors from within Spain fell by 14.8%.

Rural tourism establishments and country cottages in the Basque Country recorded a total of 32,046 overnight stays in April, with a decrease of 20.2% with respect to the same month of the previous year. At provincial level, they were down 33.8% in Álava, down by 23.8% in Bizkaia and also fell in Gipuzkoa by 12.8%.

The bed occupancy rate stood at 24.6% with a fall of 7.0 percentage points from the figures obtained in April 2017. Álava experienced a fall of 10.3 percentage points, with the bed occupancy rate standing at 19.2%. In Bizkaia the occupancy rate was 22.3%, which meant a decrease of 7.3 percentage points in relation to April 2017, and Gipuzkoa saw a fall of 5.3 percentage points, with an occupancy rate this April of 28.6%.

Finally, the average length of stay per visitor decreased this April with respect to April 2017, going from 2.51 days a year ago to 2.19 this last month.

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	Gaualdiak		Bidaia-riren sarrerak		Batez besteko egonaldia		Plazakako betetze-maila (%)	
	2018/04	m/m-12 (%)	2018/04	m/m-12 (%)	2018/04	2017/04	2018/04	p.p.*
EUSKAL AE	32.046	-20,2	14.655	-8,4	2,19	2,51	24,6	-7,0
Araba/Álava	5.374	-33,8	2.409	-26,5	2,23	2,48	19,2	-10,3
Bizkaia	8.698	-23,8	3.864	-16,2	2,25	2,47	22,3	-7,3
Gipuzkoa	17.974	-12,8	8.382	3,3	2,14	2,54	28,6	-5,3

p.p.*= aurreko urteko hilabete berarekiko portzentajeazko puntuko aldea

Iturria: Eustat. Establezimendu turistiko hartzaileen inkesta

Easter Balance for 2018

The occupancy rate by room during Easter was 75.8% in hotel establishments in the Basque Country, 6.6 percentage points fewer than the year before

The number of visitors to Basque hotel establishments rose to 41.808 during the 2018 Easter period from Thursday to Sunday (4 nights). This represents a 4.2% drop in visitors compared to the same Easter period in 2017. Of the total number of visitors, 12,467 (29.8%) were from abroad and 29,341 were from within Spain. The number of foreign visitors was down by 4.0% compared with the number of foreign visitors the previous year, and the number of visitors from within Spain fell by 4.2%.

Álava saw 5,564 visitors, 21.3% less than the previous year; Bizkaia 18,769 visitors, 5.6% less; and Gipuzkoa saw 17,475 visitors, which was a 4.7% increase.

In this same period, the total number of overnight stays in the Basque Country was 88,597, which was a decrease of 5.9% compared with 2017. Overnight stays dropped by 17.8% in Álava standing at 11,478. In Bizkaia they were down 4.5% to 41,276, and they fell 3.0% in Gipuzkoa to 35,843 overnight stays.

During Easter 2018, the occupancy rate by room was 75.8%, 6.6 percentage points less than for Easter 2017. By province, there was an occupancy rate of 67.6% in Álava, 76.0% in Bizkaia and 78.6% in Gipuzkoa. This translates as a decrease in occupancy rate of 14 percentage points in Álava, 5.9 percentage points in Bizkaia and 4.6 percentage points in Gipuzkoa compared with the rate for Easter 2017.

In the capitals, the highest occupancy rate by room was in Donostia-San Sebastián, with an occupancy rate of 87.1%, 3.9 percentage points lower than Easter the previous year. This was followed by Bilbao, which had a bed occupancy rate of 82.9%, 2.8 percentage points less than 2017, and Vitoria-Gasteiz, which attained an occupancy rate of 67.1%, down 14.5 percentage points.

The occupancy rate per room during Easter was 68.1% in the rural tourism establishments of the Basque Country

The number of visitors to rural tourism establishments in the Basque Country rose to 3,971 during the Easter period, with an increase of 2.3% compared to the same period of the previous year. Álava saw 681 visitors, 14.8% fewer than in the same period in 2017; Bizkaia saw 1,279 visitors, down 3.8%, and there were 2,011 visitors to Gipuzkoa, up 14.6% on the previous year.

During the same period, overnight stays dropped by 8.9% to 11,648 in the Basque Country as a whole. The three provinces experienced downturns of varying amounts.

The occupancy rate per room was 68.1% for the Basque Country as a whole, 67.4% in Álava, 62.3% in Bizkaia and 72.3% 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	Δ%
HOTELS						
BASQUE COUNTRY	41.808	-4,2	88.597	-5,9	75,8	-6,6
State	29.341	-4,2	63.385	-7,9	-	-
Foreigners	12.467	-4,0	25.212	-0,3	-	-
ARABA/ÁLAVA	5.564	-21,3	11.478	-17,8	67,6	-14,0
Vitoria-Gasteiz	3.843	-23,9	7.959	-16,7	67,1	-14,5
BIZKAIA	18.769	-5,6	41.276	-4,5	76,0	-5,9
Bilbao	11.487	1,0	25.621	-1,5	82,9	-2,8
GIPUZKOA	17.475	4,7	35.843	-3,0	78,6	-4,6
Donostia / San Sebastián	10.066	10,1	20.650	-1,2	87,1	-3,9
RURAL ACCOMMODATION						
BASQUE COUNTRY	3.971	2,3	11.648	-8,9	68,1	-1,7
ARABA/ÁLAVA	681	-14,8	2.431	-7,0	67,4	1,3
BIZKAIA	1.279	-3,8	3.277	-16,1	62,3	-7,2
GIPUZKOA	2.011	14,6	5.940	-5,2	72,3	0,7

(*) Easter: Thursday to Sunday (4 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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