

SURVEY ON TOURIST ESTABLISHMENTS. JULY 2018

Visitors to hotel establishments in the Basque Country rose by 2.6% in July 2018

Foreign visitor numbers increased by 5.1% and they surpassed those from within Spain in absolute values in July

There were 322,653 visitors registered in the hotel establishments of the Basque Country in July 2018, 8,252 up on the same month of the previous year, which is an increase of 2.6%, according to Eustat data. The number of visitors increased by 3.8% in Bizkaia and Gipuzkoa, but fell by 3.7% in Álava.

Furthermore, overnight stays registered in hotel establishments of the Basque Country in June 2018 reached 660,108, which was an increase of 3.7% on those registered in July of the previous year, that is, there were 23,606 more overnight stays. In Gipuzkoa they rose by 5.7%, in Bizkaia they were up 4.0%, but in Álava they dropped by 3.5%.

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

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness by rooms	
	07/2018	m/m-12 (%)	07/2018	m/m-12 (%)	07/2018	07/2017	by places		by rooms		ADR (euro)	RevPar (euro)
							07/2018	p.p.*	07/2018	p.p.*		
BASQUE COUNTRY	660.108	3,7	322.653	2,6	2,05	2,02	70,2	0,7	78,2	0,2	105,3	82,4
State	337.620	3,6	160.713	0,3	2,10	2,03	-	-	-	-	-	-
Foreigners	322.488	3,8	161.940	5,1	1,99	2,01	-	-	-	-	-	-
ARABA/ÁLAVA	81.947	-3,5	45.985	-3,7	1,78	1,78	61,0	-1,4	70,3	-0,6	77,5	54,5
State	51.601	-5,8	26.490	-5,9	1,95	1,95	-	-	-	-	-	-
Extranjeros	30.346	0,7	19.495	-0,7	1,56	1,53	-	-	-	-	-	-
Vitoria-Gasteiz	57.722	-1,7	31.425	-3,4	1,84	1,80	61,5	-1,4	73,2	0,0	66,9	48,9
BIZKAIA	302.132	4,0	153.534	3,8	1,97	1,96	68,4	0,9	77,1	-0,3	87,7	67,6
State	163.806	5,8	80.570	2,0	2,03	1,96	-	-	-	-	-	-
Foreigners	138.326	2,0	72.964	5,8	1,90	1,97	-	-	-	-	-	-
Bilbao	184.088	2,4	95.950	5,1	1,92	1,97	73,7	1,1	82,1	-0,2	96,7	79,4
GIPUZKOA	276.029	5,7	123.134	3,8	2,24	2,20	75,9	1,0	82,6	1,1	133,9	110,6
State	122.213	5,1	53.653	1,0	2,28	2,19	-	-	-	-	-	-
Foreigners	153.816	6,2	69.481	6,0	2,21	2,21	-	-	-	-	-	-
Donostia / San Sebastián	160.784	7,0	68.836	7,7	2,34	2,35	83,0	-0,1	89,1	-1,3	174,5	155,6

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 0.3% in the Basque Country compared to July of the previous year, and the number of visitors from abroad increased by 5.1%. In the case of Álava, entries of Spanish visitors saw a 5.9% downturn and there was a 0.7% drop in the case of foreign visitors. In Bizkaia, the number of Spanish visitors was up by 2.0%, while the number of visitors from abroad rose by 5.8%. In Gipuzkoa there was an increase in Spanish visitor numbers of 1.0%, whereas the number of foreign visitors rose by 6.0%.

This July the average length of stay was 2.05 days, above the average length of stay of 2.02 days registered in July 2017. In Álava the average length of stay stood at 1.78 days, obtaining the same values as July 2017; in Bizkaia there was a slight increase from 1.96 in July 2017 to 1.97 days this July, and in Gipuzkoa the average length of stay was up from 2.20 days in July 2017 to 2.24 this July.

There was an increase of 0.7 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 69.5% in July 2017 to 70.2% in July this year. In Álava the bed occupancy rate fell by 1.4 percentage points, standing at 61.0% in July 2018. In Bizkaia, the bed occupancy rate rose by 0.9 percentage points, reaching 68.4%. In Gipuzkoa the bed occupancy rate improved by 1.0 percentage points, standing at 75.9% in July 2018.

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The occupancy rate per room also registered an increase, with a 0.2 percentage point rise for the Basque Country overall, reaching 78.2%. In Álava it was down by 0.6 percentage points, standing at 70.3%, and in Bizkaia it decreased by 0.3 percentage points, reaching 77.1%. Meanwhile, in Gipuzkoa there was a drop of 1.1 percentage points, registering 82.6% occupancy per room.

The highest hotel bed occupancy rate in July this year was in Donostia-San Sebastián (83.0%), followed by Gipuzkoa Costa (78.4%) and Bilbao (73.7%).

Taking into account the day of the week, at weekends there was a higher occupancy in the Basque Country as a whole in July 2018, with 77.8% of beds occupied, whilst the registered occupancy stood at 67.6% 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 105.3 euros in July 2018, 3.0% up on the year before. The average rate stood at 77.5 euros in Álava, where it rose by 4.2%; 87.7 euros in Bizkaia, with an increase of 6.1%, and 133.9 euros in Gipuzkoa, where it was down by 0.3%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 82.4 euros in July 2018, a 3.3% increase on July 2017. The RevPAR stood at 54.5 euros in Álava, 67.6 euros in Bizkaia, and 110.6 euros in Gipuzkoa.

The occupancy rate per room during the Getxo International Jazz Festival stood at 76.2% in the hotel establishments of Bizkaia

Visitor numbers during the 2018 Getxo International Jazz Festival increased to 25,364 in the hotel establishments of Bizkaia, 21.9% up on the 2017 edition. These were visits that occurred from 4 July to 08 July 2018 (5 nights). In this same period there were 47,912 overnight stays, with a room occupancy rate 76.2% higher, also by 9 percentage points, to that recorded between 28 June and 2 July 2017, the previous year's dates for the festival.

The occupancy rate per room during the BBK Live Festival stood at 90.5% in Bilbao

Visitor numbers during the 2018 BBK Live Festival increased to 15,618 in the hotel establishments of Bizkaia. These were visits that occurred from 12 to 14 July 2018 (3 nights). Over the same period there were 34,349 overnight stays in Bizkaia as a whole. In Bilbao there were 8,855 visitors, 243 down on the period between 6 and 8 July 2017, the dates for the festival that year. The number of overnight stays, for its part, stood at 20,034, with a room occupancy rate of 90.5% compared to the 92.1% of 2017, 1.6 points down.

The occupancy rate per room during the Vitoria-Gasteiz Jazz Festival stood at 87.3%

Visitor numbers during the Jazz Festival, between 17 and 21 July, rose to 7,622 in hotel establishments in Álava. In this same period, the total number of overnight stays in Álava was 15,908, with an occupancy rate per room of 84.1%. There were 5,272 visitors to Vitoria-Gasteiz,

8.3% down on 2017, and 10,891 overnight stays, an increase of 2%; an occupancy rate of 87.3% was recorded for the five nights in question, 8 tenths up on the occupancy rate during the 2017 festival, between 11 and 15 July.

The occupancy rate per room during the Donostia-San Sebastián Jazz Festival stood at 92.3% in the city

Visitor numbers during the last few days of the Donostia-San Sebastián Jazz Festival, between 25 and 29 July (5 nights), stood at 20,753 in hotel establishments in Gipuzkoa. In this same period, the number of overnight stays in Gipuzkoa was 45,908, with an occupancy rate per room of 84.5%. There were 12,270 visitors to Donostia-San Sebastián, 5.7% down on the period between 20 and 25 July, the dates for the 2017 festival, and 26,714 overnight stays. In addition, a room occupancy rate of 92.3% was recorded, seven tenths below the figure for the previous year (93%).

In rural accommodation, visitor numbers increased by 2.9% and overnight stays rose by 8.7% in July 2018

There were 22,599 visitors to rural tourism establishments in the Basque Country this July, 2.9% more than the same month of the previous year. By province, in Álava the number of visitors fell by 11.5%, in Bizkaia there was an increase of 10.7%, and in Gipuzkoa visitor numbers were up by 2.5%. The 5,876 visitors originating from abroad signified a rise of 3.2% with regards to those received a year ago and represented 26.0% of the total number of visitors. For their part, visitors from within Spain were up by 2.8%.

Rural tourism establishments and country cottages in the Basque Country recorded a total of 69,022 overnight stays in July, with an increase of 8.7% with respect to the same month of the previous year. At a provincial level, in Bizkaia they increased by 16.9% and in Gipuzkoa they rose by 7.1%; in Álava, however, they fell by 4.1%.

The bed occupancy rate stood at 48.6% with an increase of 2.9 percentage points on the figures obtained in July 2017. Álava recorded a drop of 1.7 percentage points, with a bed occupancy rate of 23.8%. In Bizkaia the occupancy rate was 49.8%, which meant an increase of 5.0 percentage points in relation to July 2017, and Gipuzkoa saw a rise of 3.7 percentage points to an occupancy rate this July of 58.7%.

Finally, the average length of stay per visitor increased this July with respect to July 2017, going from 2.89 days a year ago to 3.05 this last month.

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

	Overnight stays		Visitors		Average length		Degree of occupation by places (%)	
	07/2018	m/m-12 (%)	07/2018	m/m-12 (%)	07/2018	07/2017	07/2018	p.p.*
BASQUE COUNTRY	69.022	8,7	22.599	2,9	3,05	2,89	48,6	2,9
Araba/Álava	7.056	-4,1	2.773	-11,5	2,54	2,35	23,8	-1,7
Bizkaia	22.134	16,9	7.190	10,7	3,08	2,92	49,8	5,0
Gipuzkoa	39.832	7,1	12.636	2,5	3,15	3,02	58,7	3,7

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

Source: Eustat. Survey on tourist establishments

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