

SURVEY ON TOURIST ESTABLISHMENTS. HOTELS AND RURAL ACCOMMODATION. DECEMBER 2019

## The balance for 2019 closed with a 3.7% growth in both visitor numbers and overnight stays

**In December 2019, visitor numbers in hotel establishments in the Basque Country were up by 2.5%**

The 2019 annual balance for hotel establishments of the Basque Country registered an increase of 3.7% in both visitor numbers and overnight stays compared to the previous year, according to EUSTAT data. 2019 saw a total of 3,184,904 visitors, that is, 113,774 more than the previous year, and 6,265,610 overnight stays, 225,087 more than in 2018.

In December 2019, there were 208,813 visitors registered in hotel establishments in the Basque Country, which was a rise of 2.5%. The number of visitors was up 4.0% in Bizkaia and 1.8% in Gipuzkoa, but there was a drop of 0.7% in Álava.

Furthermore, overnight stays registered in hotel establishments of the Basque Country in December 2019 reached 384,037, which was an increase of 0.6% on those registered in December of the previous year, that is, there were 2,456 more overnight stays. There was also a positive year-on-year trend in overnight stays in Bizkaia, where they rose by 1.1% and in Gipuzkoa, where they were up 0.5%, however in Álava they were down by 0.5%.

**Overnight stays, visitor numbers, average stay and bed occupancy rates in hotel establishments in the Basque Country. December 2019**

	Overnight stays		Visitors		Average length		Degree of occupation (%)				Cost effectiveness by rooms			
	12/2019	m/m-12 (%)	12/2019	m/m-12 (%)	12/2019	12/2018	12/2019	p.p.*	12/2019	p.p.*	ADR (euro)	RevPar (euro)		
												12/2019	m/m-12 (%)	12/2019
<b>BASQUE COUNTRY</b>	<b>384.037</b>	<b>0,6</b>	<b>208.813</b>	<b>2,5</b>	<b>1,84</b>	<b>1,87</b>	<b>44,1</b>	<b>-0,4</b>	<b>52,1</b>	<b>0,2</b>	<b>76,8</b>	<b>1,65</b>	<b>40,0</b>	<b>2,12</b>
State	272.814	-0,1	148.120	1,2	1,84	1,87	-	-	-	-	-	-	-	-
Foreigners	111.223	2,5	60.693	6,0	1,83	1,89	-	-	-	-	-	-	-	-
<b>ARABA/ÁLAVA</b>	<b>53.517</b>	<b>-0,5</b>	<b>28.848</b>	<b>-0,7</b>	<b>1,86</b>	<b>1,85</b>	<b>42,7</b>	<b>1,1</b>	<b>52,2</b>	<b>2,9</b>	<b>64,8</b>	<b>-0,05</b>	<b>33,8</b>	<b>5,72</b>
State	45.112	1,2	24.210	0,9	1,86	1,86	-	-	-	-	-	-	-	-
Extranjeros	8.405	-8,7	4.638	-8,4	1,81	1,82	-	-	-	-	-	-	-	-
Vitoria-Gasteiz	42.174	2,1	22.179	2,4	1,90	1,91	45,4	1,4	57,2	3,6	59,2	3,93	33,9	11,01
<b>BIZKAIA</b>	<b>191.669</b>	<b>1,1</b>	<b>104.644</b>	<b>4,0</b>	<b>1,83</b>	<b>1,88</b>	<b>44,4</b>	<b>-2,2</b>	<b>53,0</b>	<b>-1,0</b>	<b>74,7</b>	<b>2,47</b>	<b>39,6</b>	<b>0,66</b>
State	137.209	-0,2	75.872	1,3	1,81	1,84	-	-	-	-	-	-	-	-
Foreigners	54.460	4,6	28.772	11,7	1,89	2,02	-	-	-	-	-	-	-	-
Bilbao	133.619	5,7	72.884	7,7	1,83	1,87	49,7	-2,2	58,4	-0,7	80,7	2,54	47,2	1,27
<b>GIPUZKOA</b>	<b>138.851</b>	<b>0,5</b>	<b>75.321</b>	<b>1,8</b>	<b>1,84</b>	<b>1,87</b>	<b>44,3</b>	<b>1,4</b>	<b>50,9</b>	<b>0,6</b>	<b>84,7</b>	<b>1,58</b>	<b>43,1</b>	<b>2,86</b>
State	90.493	-0,5	48.038	1,1	1,88	1,91	-	-	-	-	-	-	-	-
Foreigners	48.358	2,3	27.283	3,1	1,77	1,79	-	-	-	-	-	-	-	-
Donostia / San Sebastián	88.275	2,3	48.836	3,3	1,81	1,83	50,1	2,6	55,6	2,6	101,1	-0,37	56,1	4,41

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

Source: Eustat. Survey on tourist establishments

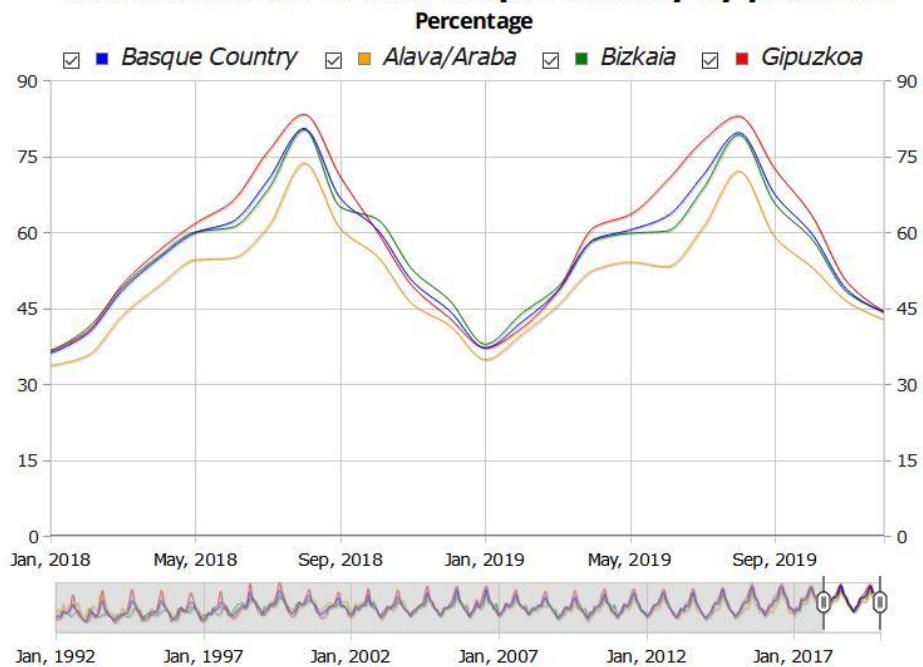
The number of visitors from within Spain rose by 1.2% in the Basque Country compared to December of the previous year, whilst the number of visitors from abroad rose by 6.0%. Álava registered a 0.9% increase in visitors from Spain, and an 8.4% decrease in foreign visitors. In Bizkaia, the number of visitors from within Spain rose by 1.3%, while the number of visitors from abroad increased by 11.7%. In Gipuzkoa there was an increase in Spanish visitor numbers of 1.1%, and the number of foreign visitors rose by 3.1%.

The average length of stay was 1.84 days last December, slightly below the 1.87 days average length of stay that was registered in December 2018. In Álava there was an increase from 1.85 days last year to 1.86 days in December 2019; in Bizkaia it decreased from 1.88 days in December

2018 to 1.83 days in December 2019; the average length of stay was also down in Gipuzkoa going from 1.87 days in December 2018 to 1.84 days in December 2019.

There was a decrease of 0.4 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 44.5% in December 2018 to 44.1% in December 2019. Álava experienced a rise of 1.1 percentage points, going from an occupancy rate of 41.6% in December 2018 to a rate of 42.7% in December 2019. The occupancy rate also rose in Gipuzkoa, 1.4 percentage points, from the 42.9% achieved in December 2018 to 44.3% in December 2019. In contrast, Bizkaia recorded a drop of 2.2 percentage points, going from a bed occupancy rate of 46.6% in December 2018 to a rate of 44.4% in December 2019.

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



The occupancy rate per room also registered an upward trend, with a 0.2 percentage point increase for the Basque Country overall, reaching 52.1%. In Álava it was up 2.9 percentage points, standing at 52.2%; in Bizkaia it increased by 0.6 percentage points to reach an occupancy rate per room of 50.9%; in Gipuzkoa it fell by 1 percentage point, standing at 53%.

The highest hotel bed occupancy rate this December was in Donostia-San Sebastián (50.1%), followed by Bilbao (49.7%) and Vitoria-Gasteiz (45.4%).

Taking into account the day of the week, at weekends there was a higher occupancy in the Basque Country as a whole in December 2019, with 60.4% of places occupied, whilst the registered occupancy stood at 38.3% 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 76.8 euros in December 2019, 1.65% up on the year before. The average rate stood at 64.8 euros in Álava, where it was almost the same as the previous year,

down just 0.05%; 74.7 euros in Bizkaia, with an increase of 2.5%, and 84.7 euros in Gipuzkoa, where it rose 1.6%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 40.0 euros in December 2019, a 2.1% increase on December 2018. The RevPAR stood at 33.8 euros in Álava, 39.6 euros in Bizkaia, and 43.1 euros in Gipuzkoa.

### **2019 ANNUAL BALANCE for hotel establishments: 225 thousand more overnight stays**

In 2019 there was a total of 6,265,610 overnight stays, that is, 225,087 more than the previous year, representing an increase of 3.7%. Overnight stays were up 6.3% in Gipuzkoa and 2.8% in Bizkaia, whereas they were down 0.5% in Álava.

Visitor numbers in 2019 stood at 3,184,904, that is, 113,774 more visitors than the previous year, with the same increase in relation to overnight stays, 3.7%. Visitor numbers were up 6.3% in Gipuzkoa and 3.7% in Bizkaia, but were down 3.4% in Álava.

The average length of stay remained at 1.97 days in 2019 in the Basque Country, whilst the bed occupancy rate was up by 0.6 percentage points, standing at 57.4% for the Basque Country as a whole.

Finally, with regards to the profitability indicators of the sector, the average daily rate (ADR) of hotels in the Basque Country stood at 93.4 euros in 2019, 3.2% up on the year before. The average rate stood at 72.4 euros in Álava, where it rose by 1.0%; 85.8 euros in Bizkaia, with an increase of 2.7%, and 109.7 euros in Gipuzkoa, where it was up 3.7%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 63.9 euros in 2019, a 4.6% increase on 2018. The RevPAR stood at 46.1 euros in Álava, 59.0 euros in Bizkaia, and 76.5 euros in Gipuzkoa.

#### **Overnight stays, visitor numbers, average stay and bed occupancy rates in hotel establishments in the Basque Country. 2019**

	Overnight stays		Visitors		Average length		Degree of occupation (%)		Cost effectiveness by rooms			
	2019	2019/2018 (%)	2019	2019/2018 (%)	2019	2018	by places		by rooms		ADR (euro)	RevPar (euro)
							2019	p.p.*	2019	p.p.*		
<b>BASQUE COUNTRY</b>	<b>6.265.610</b>	<b>3,7</b>	<b>3.184.904</b>	<b>3,7</b>	<b>1,97</b>	<b>1,97</b>	<b>57,4</b>	<b>0,6</b>	<b>68,4</b>	<b>0,9</b>	<b>93,4</b>	<b>3,24</b>
ARABA/ÁLAVA	788.003	-0,5	416.219	-3,4	1,89	1,84	51,6	0,4	63,7	1,7	72,4	1,03
BIZKAIA	2.936.963	2,8	1.518.091	3,7	1,93	1,95	56,6	-0,4	68,7	-0,3	85,8	2,75
GIPUZKOA	2.540.644	6,3	1.250.594	6,3	2,03	2,03	60,4	1,7	69,8	2,0	109,7	3,71
											63,9	4,60
											46,1	3,80
											59,0	2,27
											76,5	6,78

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

Source: Eustat Survey on tourist establishments

### ***In rural accommodation, visitor numbers decreased by 6.4% and overnight stays fell by 8.3% in December***

There were 10,924 visitors to rural accommodation in the Basque Country, 6.4% fewer than the same month of the previous year. By province, in Álava the number of visitors was up 5.7%, in Bizkaia there was a drop of 13%, and in Gipuzkoa there was a decrease of 6.3%.

The 878 visitors originating from abroad signified a decrease of 19.4% with regards to those received a year ago and represented 8% of the total number of visitors. For its part, the number of visitors from within Spain dropped by 5.1%.

Rural tourism establishments and country cottages in the Basque Country recorded a total of 25,917 overnight stays in December 2019, with a decrease of 8.3% compared to the same month of the previous year. By province, in Álava they were down 2.6%, in Bizkaia 20.4% and in Gipuzkoa 1.7%.

**Overnight stays, visitor numbers, average stay and occupancy rates in rural accommodation in the Basque Country. December 2019**

	Overnight stays		Visitors		Average length		Degree of occupation by places (%)	
	12/2019	m/m-12 (%)	12/2019	m/m-12 (%)	12/2019	12/2018	12/2019	p.p.*
<b>BASQUE COUNTRY</b>	<b>25.917</b>	<b>-8,3</b>	<b>10.924</b>	<b>-6,4</b>	<b>2,37</b>	<b>2,42</b>	<b>21,4</b>	<b>-2,0</b>
Araba/Álava	5.127	-2,6	2.391	5,7	2,14	2,33	17,7	-0,6
Bizkaia	7.755	-20,4	3.715	-13,0	2,09	2,28	22,1	-4,8
Gipuzkoa	13.035	-1,7	4.818	-6,3	2,71	2,58	22,7	-0,8

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

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

The bed occupancy rate stood at 21.4% with a fall of 2 percentage points from the figures obtained in December 2018. In Álava it decreased by 0.6 percentage points, standing at 17.7%. In Bizkaia the occupancy rate was 22.1%, but was down 4.8 percentage points in relation to December 2018, and Gipuzkoa saw a fall of 0.8 percentage points to reach an occupancy rate this December of 22.7%.

Finally, the average length of stay per visitor decreased this December, going from 2.42 days a year ago to 2.37 this last month.

**2019 ANNUAL BALANCE for rural tourism establishments: visitor numbers were down 3.1% and overnight stays fell by 4.1%**

There were 167,077 visitors to rural tourism establishments and country cottages in the Basque Country throughout 2019, which was 3.1% down on the previous year, whilst overnight stays stood at 431,689, 4.1% fewer than in 2018.

Visitor numbers were down 2.8% in Bizkaia and 7.1% in Gipuzkoa, but were up 7.8% in Álava. Overnight stays were also down in Bizkaia and Gipuzkoa, by 4.2% and 7.4%, respectively, and up 7.7% in Álava.

The average stay per visitor fell from 2.61 days in 2018 to 2.58 days in 2019. The bed occupancy rate fell almost one percentage point (-0.9 points), standing at 28.6% in 2019.

## Overnight stays, visitor numbers, average stay and occupancy rates in rural accommodation in the Basque Country. 2019

	Overnight stays		Visitors		Average length		Degree of occupation (%)		Degree of occupation (%)	
	2019	2019/2018 (%)	2019	2019/2018 (%)	2019	2018	by places		by rooms	
							2019	p.p.*	2019	p.p.*
<b>BASQUE COUNTRY</b>	<b>431.689</b>	<b>-4,1</b>	<b>167.077</b>	<b>-3,1</b>	<b>2,58</b>	<b>2,61</b>	<b>28,6</b>	<b>-0,9</b>	<b>32,1</b>	<b>-0,3</b>
ARABA/ÁLAVA	73.832	7,7	32.659	7,8	2,26	2,26	20,9	0,5	23,02	0,5
BIZKAIA	133.123	-4,2	51.873	-2,8	2,57	2,60	29,5	-0,2	33,22	0,5
GIPUZKOA	224.734	-7,4	82.545	-7,1	2,72	2,73	31,9	-1,8	36,04	-1,0

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

Source: Eustat. Survey on tourist establishments

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