

SURVEY ON TOURIST ESTABLISHMENTS. HOTELS AND RURAL ACCOMMODATION. AUGUST 2020

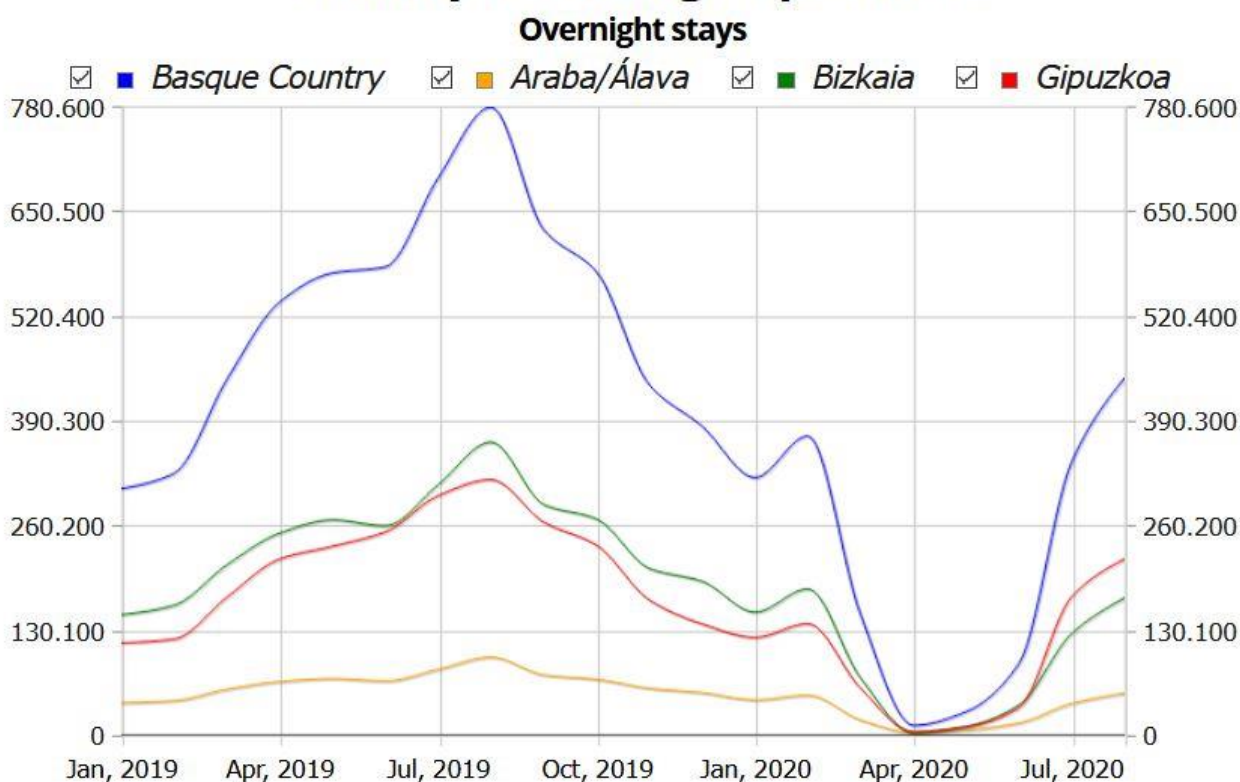
In August 2020 hotel establishments in the Basque Country registered a 39.2% drop in visitor numbers

The bed occupancy rate dropped from 79.6% in August 2019 to 49.8% in August 2020, but was almost 8 percentage points above July 2020

The number of visitors at hotel establishments in the Basque Country in August 2020 stood at 216,967, resulting in 444,267 overnight stays, which represented a year-on-year fall of 39.2% in visitors and of 43.1% in overnight stays, according to Eustat data.

These data show the prolonged effect of the COVID-19 crisis on the hotel sector in the Basque Country, although they are an improvement on those observed in July, which recorded year-on-year decreases of 45.2% in visitors and 50.8% in overnight stays.

Overnight stays in hotel establishments in the Basque Country according to province



Compared to the previous month, July 2020, there were 37,124 more visitors and 103,891 more overnight stays than in July. The moderate revival of activity was seen in all three provinces. In Álava, the 22,285 visitors and 40,275 overnight stays registered in July 2020 increased to 28,761 visitors and 53,091 overnight stays in August. In Bizkaia, 65,028 visitors were observed in July 2020 compared to the 82,814 registered in August, with overnight stays rising from 127,211 to 171,392.

Finally, in Gipuzkoa, visitors and overnight stays in August totalled 105,392 and 219,784, respectively, compared to the 92,530 and 172,890 observed in July.

The effect of the crisis this August compared to the same month of the previous year was not even across all the three provinces. In Álava, visitor numbers were down by 41.8% and overnight stays by 45.7%, and in Bizkaia visitor numbers fell by 52.0 % and overnight stays by 53.0%. On the other hand, in Gipuzkoa the year-on-year decrease was less pronounced, with a 21.9% drop in visitors and a 30.9% fall in overnight stays.

Overnight stays, visitor numbers, average stay, bed occupancy rates and profitability in hotel establishments in the Basque Country. August 2020

	Overnight stays		Visitors		Average stay		Degree of occupation (%)				Profitability			
	08/2020	m/m-12 (%)	08/2020	m/m-12 (%)	08/2020	08/2019	by places		by rooms		ADR (euro)		RevPar (euro)	
							08/2020	p.p.*	08/2020	p.p.*	08/2020	m/m-12 (%)	08/2020	m/m-12 (%)
BASQUE COUNTRY	444.267	-43,1	216.967	-39,2	2,05	2,19	49,8	-29,8	55,3	-29,6	91,9	-21,83	50,8	-49,08
State	315.854	-28,4	146.677	-21,2	2,15	2,37	-	-	-	-	-	-	-	-
Foreigners	128.413	-62,1	70.290	-58,9	1,83	1,98	-	-	-	-	-	-	-	-
ARABA/ÁLAVA	53.091	-45,7	28.761	-41,8	1,85	1,98	46,8	-25,2	53,6	-25,7	68,9	-13,84	36,9	-41,78
State	42.553	-37,3	21.819	-28,4	1,95	2,23	-	-	-	-	-	-	-	-
Extranjeros	10.538	-64,7	6.942	-63,4	1,52	1,57	-	-	-	-	-	-	-	-
Vitoria-Gasteiz	32.011	-53,0	16.694	-51,1	1,92	2,00	44,0	-26,9	54,2	-24,9	57,3	-21,36	31,1	-46,11
BIZKAIA	171.392	-53,0	82.814	-52,0	2,07	2,11	41,6	-37,6	48,2	-35,5	70,6	-27,77	34,0	-58,42
State	129.922	-37,3	60.164	-34,0	2,16	2,27	-	-	-	-	-	-	-	-
Foreigners	41.470	-73,6	22.650	-72,2	1,83	1,93	-	-	-	-	-	-	-	-
Bilbao	100.432	-55,1	51.931	-52,6	1,93	2,04	39,9	-42,7	44,7	-42,0	71,7	-34,87	32,0	-66,41
GIPUZKOA	219.784	-30,9	105.392	-21,9	2,09	2,36	60,0	-22,9	63,8	-24,5	116,1	-23,79	74,1	-44,90
State	143.379	-13,6	64.694	0,3	2,22	2,57	-	-	-	-	-	-	-	-
Foreigners	76.405	-49,7	40.698	-42,2	1,88	2,16	-	-	-	-	-	-	-	-
Donostia / San Sebastián	135.124	-27,6	63.111	-17,1	2,14	2,45	63,6	-25,7	66,1	-27,3	134,3	-31,72	88,8	-51,69

p.p.*= difference in percentage points on the same month of the previous year
 Source: Eustat. Survey on tourist establishments

Hotel establishments of the Basque Country as a whole registered 146,677 visitors from Spain, compared to 70,290 from abroad; 21.2% and 58.9% down on August 2019, respectively. Visitor numbers for those coming from abroad represented 32.4% of the total visitor numbers, whereas for the same month in 2019 this percentage rose to 47.9%.

This August the average length of stay was 2.05 days, below the average length of stay of 2.19 days registered in August 2019. In Álava there was a decrease from 1.98 days last year to 1.85 days in August of this year; in Bizkaia it fell from 2.11 days in August 2019 to 2.07 days in August 2020; the same pattern was seen in Gipuzkoa, where the average length of stay fell from the 2.36 days obtained in August 2019 to the 2.09 days obtained this August.

There was a decrease of 29.8 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 79.6% in August 2019 to 49.8% in August this year. By province, bed occupancy rates stood at 46.8%, 41.6% and 60% for Álava, Bizkaia and Gipuzkoa, following year-on-year decreases of 25.2, 37.6 and 22.9 percentage points, respectively.

The revenue per available room (RevPAR) was down 49.1% in August 2020 and the average daily rate (ADR) shrank by 21.8%

With regards to the profitability indicators of the sector, the average daily rate (ADR) of hotels in the Basque Country stood at 91.9 euros in August 2020, down 21.8% on the year before. The average rate stood at 68.9 euros in Álava, where it decreased by 13.8%; 70.6 euros in Bizkaia, with a decrease of 27.8%, and 116.1 euros in Gipuzkoa, down 23.8%.

The revenue per available room (RevPAR) in the Basque Country overall, which is dependent on the occupancy rate of hotel establishments, stood at 50.8 euros in August 2020, 49.1% down on August 2019. The RevPAR stood at 36.9 euros in Álava, 34.0 euros in Bizkaia, and 74.1 euros in Gipuzkoa.

In the Basque Country as a whole, establishments that have maintained some hotel activity returned to the level they had in March 2020, at the start of the pandemic, although below that recorded in August 2019. Specifically, 532 hotel establishments were open at some point during August 2020, exceeding the 510 recorded in July 2020, although not reaching the 581 that registered some activity in August 2019.

Hotel establishments that have been active and those that have remained closed. COVID19 period

2020	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
	Active	Closed	Active	Closed	Active	Closed	Active	Closed
August	532	88	55	20	203	33	274	35
July	510	109	55	20	192	43	263	46
June	372	246	46	29	141	94	185	123
May	188	430	20	55	80	156	88	219
April	56	563	6	69	29	207	21	287
March	532	87	62	13	206	30	264	44
August 2019	581	31	68	7	223	10	290	14

Source: Eustat. Survey on tourist establishments

By province the trend of reopening continued along the same lines as the previous month, but neither Álava nor Bizkaia attained the March 2020 levels of opening. Álava recorded the same hotel establishments with some activity as in July 2020, a figure slightly below the 68 registered in August 2019. Bizkaia went from 192 establishments open at some point in July 2020 to 203 in August. In August 2019 this figure stood at 223. In Gipuzkoa there were 274 establishments that opened at some point in August 2020, exceeding the 263 registered in July 2020, but without reaching the 290 that were open in August 2019.

Overnight stays registered in rural accommodation during August 2020 were down 29.6% compared to August 2019

The number of visitors to rural accommodation establishments in the Basque Country stood at 18,355 in August 2020, above the 14,054 observed in July, but 22.0% lower than those registered in August 2019. Similarly, overnight stays increased between July and August, going from 44,051 in July to 63,740 in August 2020. However, compared to August 2019, a 29.6% decrease in the number of overnight stays was observed.

By province, Álava recorded 3,007 visitors and 8,948 overnight stays in August 2020; Bizkaia 5,234 visitors and 19,452 overnight stays; and, finally, Gipuzkoa 10,114 visitors and 35,340 overnight stays. These figures are far below those observed in August 2019, especially in the case of Bizkaia, although they reveal the revival of activity in the three provinces.

Overnight stays, visitors, average stay and occupancy rate in rural accommodation in the Basque Country. August 2020

	Overnight stays		Visitors		Average stay		Degree of occupancy by places (%)	
	08/2020	m/m-12 (%)	08/2020	m/m-12 (%)	08/2020	08/2019	08/2020	p.p.*
BASQUE COUNTRY	63.740	-29,6	18.355	-22,0	3,47	3,84	48,8	-15,3
Araba/Álava	8.948	-37,3	3.007	-32,1	2,98	3,22	28,9	-15,7
Bizkaia	19.452	-30,7	5.234	-29,4	3,72	3,79	50,8	-14,9
Gipuzkoa	35.340	-26,6	10.114	-13,5	3,49	4,12	57,4	-14,9

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

Source: Eustat. Survey on tourist establishments

The effect of the COVID-19 crisis in **rural accommodation** was similar to that observed in hotels. Thus, the establishments that offered accommodation in August totalled 359, compared to the 385 that were open in August 2019. Conversely, a total of 69 establishments remained closed during the entire period, as opposed to the 34 that were closed in August 2019.

Likewise, as regards the previous month, July 2020, a slight increase in activity was observed, given that the number of establishments with activity in that month was 351, compared to the aforementioned 359 in August. In turn, the number of closed establishments went from 80 in July to 69 in August.

Rural tourism establishments that have been active and those that have remained closed.

2020	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
	Active	Closed	Active	Closed	Active	Closed	Active	Closed
August	359	69	93	12	105	24	161	33
July	351	80	88	17	103	28	160	37
June	285	143	68	37	87	42	130	64
May	167	260	30	75	54	74	83	111
April	31	396	3	102	11	117	17	177
March	329	99	89	16	94	35	146	48
August 2019	385	34	96	6	115	12	174	16

Source: Eustat. Survey on tourist establishments

Note: Eustat would like to thank all the establishments that have collaborated in making this effort despite the extraordinary circumstances. As a result, it has been possible to disseminate this information, enabling the effects of the measures adopted on this sector to be quantified.

For further information:

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