

SURVEY ON TOURIST ESTABLISHMENTS. TOURIST APARTMENTS AND OTHER TOURIST ACCOMMODATION. SEPTEMBER 2020

During the summer of 2020, the tourist establishments that best withstood the impact of the health crisis in the Basque Country were tourist apartments

Rioja Alavesa, the Bizkaia Coast, San Sebastián and the Gipuzkoa Coast offered the best results for both visitors and overnight stays at hotels

RESULTS SUMMER 2020: JULY, AUGUST AND SEPTEMBER

During **July, August and September** 2020, visitors and overnight stays in tourist apartments fell by 29.7% and 27.1%, respectively, compared to the same period of the previous year, according to data processed by Eustat. These decreases are more moderate than those recorded for other tourist establishments.

The reductions were prompted by the numbers of visitors who reside abroad, with a 66.4% drop in visitors and a 59.5% decrease in overnight stays, compared to summer 2019.

The bed occupancy rate during the summer months of 2020 was 30.3%, 13.7 percentage points lower than in summer 2019. As regards the apartment occupancy rate, it stood at 55.8% of the total, 18.8 percentage points below the value for the previous year.

Visitors, overnight stays, average length of stay and bed occupancy rates in tourist apartments of the Basque Country by province and origin. Summer 2020

	Entries		Overnight stays		Average stay		Degrees of occupation by seats		Degrees of occupation by apartments	
	p	p/p-1	p	p/p-1	p	p-1	p	p.p.*	p	p.p.*
BASQUE COUNTRY	21.697	-29,7	82.536	-27,1	3,80	3,67	30,3	-13,7	55,8	-18,8
State	17.673	-6,3	66.492	-9,8	3,76	3,91				
Foreigners	4.024	-66,4	16.045	-59,5	3,99	3,31				
ARABA/ÁLAVA	2.998	-20,0	19.850	-22,3	6,62	6,82	23,9	-5,3	54,3	-15,7
State	2.698	-8,1	17.128	-13,4	6,35	6,74				
Foreigners	299	-63,0	2.722	-52,8	9,09	7,12				
BIZKAIA	10.633	-31,4	31.917	-27,7	3,00	2,85	29,1	-20,9	50,2	-24,4
State	8.825	-8,3	26.537	-5,6	3,01	2,92				
Foreigners	1.808	-69,3	5.379	-66,4	2,98	2,72				
GIPUZKOA	8.066	-30,4	30.769	-29,4	3,81	3,76	38,9	-14,8	64,3	-15,2
State	6.150	-2,5	22.826	-11,5	3,71	4,09	-	-	-	-
Foreigners	1.917	-64,0	7.943	-55,4	4,14	3,37	-	-	-	-

p= summer: From July 1st to September 30th

p/p-1 Tasa de variación interanual en el último periodo observado (p) respecto al mismo periodo del año anterior (p-1)

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

Source: Eustat. Survey on tourist establishments

By province, Álava recorded the best figures during summer 2020, although visitor numbers were 20% lower than those for the previous summer and overnight stays fell by 22.3%. In Bizkaia, visitors were also down by 31.4% and overnight stays by 27.7%. Finally, in Gipuzkoa, visitor numbers and overnight stays dropped by 30.4% and 29.4%, respectively, compared to the summer months of 2019.

During the summer months of 2020, overnight stays fell by 48.5% in hotels, rural accommodation and tourist apartments as a whole in the Basque Country compared to summer 2019

In hotels, rural accommodation and tourist apartments as a whole in the Basque Country, the **results for July, August and September** 2020 reveal that the COVID-19 crisis has had a major impact on the sector. Both visitor numbers and overnight stays were affected significantly, with values of 588,441 visitors and 1,244,676 overnight stays, representing a decrease of 46.4% in visitors and 48.5% in overnight stays.

Visitors, overnight stays and degree of occupation by places in the tourist establishments in the Basque Country. Summer 2020

	Visitors						Overnight stays						Degrees of occupation by seats	
	p	%	p-1	%	p/p-1	p	%	p-1	%	p/p-1	p	p.p.*		
	BASQUE COUNTRY	588.441	100,0	1.097.215	100,0	-46,4	1.244.676	100,0	2.414.793	100,0	-48,5	39,1	-28,8	
State	419.788	71,3	570.670	52,0	-26,4	929.304	74,7	1.321.216	54,7	-29,7	-	-		
Foreigners	168.653	28,7	526.545	48,0	-68,0	315.373	25,3	1.093.577	45,3	-71,2	-	-		
ARABA/ÁLAVA	78.488	13,3	146.710	13,4	-46,5	165.972	13,3	311.152	12,9	-46,7	33,0	-20,5		
State	62.908	80,2	94.193	64,2	-33,2	138.856	83,7	216.535	69,6	-35,9	-	-		
Foreigners	15.579	19,8	52.516	35,8	-70,3	27.116	16,3	94.617	30,4	-71,3	-	-		
BIZKAIA	219.308	37,3	515.037	46,9	-57,4	466.740	37,5	1.071.293	44,4	-56,4	34,1	-34,2		
State	168.126	76,7	268.507	52,1	-37,4	369.060	79,1	582.589	54,4	-36,7	-	-		
Foreigners	51.182	23,3	246.530	47,9	-79,2	97.679	20,9	488.704	45,6	-80,0	-	-		
GIPUZKOA	290.645	49,4	435.468	39,7	-33,3	611.964	49,2	1.032.347	42,8	-40,7	46,5	-26,8		
State	188.754	64,9	207.969	47,8	-9,2	421.387	68,9	522.092	50,6	-19,3	-	-		
Foreigners	101.892	35,1	227.499	52,2	-55,2	190.577	31,1	510.255	49,4	-62,7	-	-		

p= summer: From July 1st to September 30th

p/p-1: tasa de variación interanual en el último periodo observado (p) respecto al mismo periodo del año anterior (p-1)

p.p.*: difference in percentage points on the same time of the previous year

Source: Eustat. Survey on tourist establishments

There were contrasting trends in tourist activity across the provinces. Bizkaia felt the greatest impact of the measures adopted to combat the health crisis, with visitor numbers and overnight stays 57.4% and 56.4% lower than in summer 2019. Álava was next, with visitors down by 46.5% and overnight stays by 46.7%. Finally, in Gipuzkoa the decreases were very significant but less pronounced, with visitors falling by 33.3% and overnight stays by 40.7%.

As regards the origin of visitors during the summer months of 2020, the reduction in foreign tourists was particularly pronounced, with visitor numbers falling by 68% and overnight stays by 71.2%, while for Spanish holidaymakers the figures were 26.4% and 29.7%, respectively.

As a result, the bed occupancy rate dropped in the Basque Country as a whole by 28.8 percentage points, standing at 39.1% in summer 2020. By province, it was 33.0% in Álava this summer (20.5 percentage points below the previous summer), in Bizkaia it stood at 34.1%, after a year-on-year drop of 34.2 percentage points, and finally, in Gipuzkoa the bed occupancy rate was 46.5%, i.e. 26.8 percentage points lower than in summer 2019.

Rioja Alavesa and the Gipuzkoa Coast were the areas where overnight stays in hotels fell the least

An analysis by geographical area offers greater insight into the varying impact of the crisis, at least as regards hotel accommodation. In Bizkaia, clearly the worst affected province, the *Bizkaia Coast* was the area that fared the best in comparison to the rest of the province, both for visitor numbers (-41.4%) and overnight stays (-41.7%).

The situation in Álava falls midway between the other provinces, but Rioja Alavesa stands out as the area that has best withstood the crisis, with decreases under 40% in both visitor numbers (-37.7%) and overnight stays (-38.5%).

In Gipuzkoa, which recorded the least negative figures, the *Gipuzkoa Coast* area stands out with reductions of less than 30% in visitor numbers (-29.7%) and 35.2% in overnight stays, whilst the performances of both *San Sebastián* and its *Metropolitan Area* were also more than 10 points less negative than the average for the Basque Country, both for visitors (-29.6% and -36.8%, respectively), and overnight stays (-40.3% and -40.7 %, respectively).

Visitors and overnight stays in hotel establishments of the Basque Country by geographical area. Summer 2020

	Visitors		Overnight stays	
	p	p/p-1	p	p/p-1
BASQUE COUNTRY	526.814	-47,4	1.034.437	-50,8
ARABA/ÁLAVA	69.140	-47,6	127.621	-50,1
Vitoria-Gasteiz	43.207	-51,9	83.414	-54,1
Rioja Alavesa	12.850	-37,7	21.668	-38,5
Rest of Álava	13.083	-39,1	22.539	-42,2
BIZKAIA	197.540	-58,7	397.875	-58,7
Bilbao	121.845	-59,3	230.784	-61,2
Metropolitan area (1)	28.061	-66,4	61.331	-61,8
Bizkaia coast	32.255	-41,4	67.929	-41,7
Inland Bizkaia	15.379	-61,4	37.831	-59,0
GIPUZKOA	260.134	-33,6	508.941	-42,2
Donostia / San Sebastián	155.319	-29,6	308.331	-40,3
Metropolitan area (1)	24.353	-36,8	49.567	-40,7
Gipuzkoa coast (1)	64.984	-29,7	115.423	-35,2
Inland Gipuzkoa	15.478	-61,6	35.620	-65,4

p= summer: From July 1st to September 30th

p/p-1 Tasa de variación interanual en el último periodo observado (p) respecto al mismo periodo del año anterior (p-1)

(1) Does not include the capital

Source: Eustat. Survey on tourist establishments

RESULTS SEPTEMBER 2020

As regards **tourist apartments** during **September 2020**, visitor numbers and overnight stays totalled 4,452 and 19,708, respectively. These figures represent a reduction of 45.4% for visitors and 32.8% for overnight stays, compared to September 2019. The decrease was particularly marked as regards people from abroad, with 81.4% fewer foreign visitors in September 2020 than in September of the previous year and 68.7% fewer overnight stays.

The average length of stay in tourist apartments in the Basque Country was 4.43 days in September 2020, above the average of 3.59 days in September 2019.

Visitors, overnight stays and average stay in tourist apartments in the Basque Country. September 2020

	Visitors		Overnight stays		Average stay	
	09/20	m/m-12 (%)	09/20	m/m-12 (%)	09/20	09/2019
BASQUE COUNTRY	4.452	-45,4	19.708	-32,8	4,43	3,59
State	3.907	-25,4	16.525	-13,7	4,23	3,66
Foreigners	544	-81,4	3.183	-68,7	5,85	3,48
ARABA/ÁLAVA	609	-32,2	5.936	-17,4	9,74	7,99
State	576	-27,7	5.207	-7,0	9,04	7,03
Extranjeros	33	-67,5	730	-54,1	21,85	15,46
BIZKAIA	2.191	-50,0	7.040	-37,2	3,21	2,56
State	1.984	-27,8	5.929	-14,6	2,99	2,53
Foreigners	208	-87,3	1.111	-74,0	5,35	2,62
GIPUZKOA	1.651	-42,7	6.731	-38,3	4,08	3,79
State	1.348	-20,3	5.389	-18,3	4,00	3,90
Foreigners	303	-74,5	1.342	-68,9	4,42	3,63

Source: Eustat. Survey on tourist establishments

Finally, Bizkaia was the province where visitor numbers fell the most in September 2020 in comparison to the same month of the previous year. There was a 50.0% decrease, resulting in 7,040 overnight stays (37.2% fewer than the previous year). Gipuzkoa was next, with 42.7% fewer visitors and 38.3% fewer overnight stays. In Álava, visitor numbers fell by 32.2% and overnight stays by 17.4%, compared to September 2019.

September was the worst-performing month in summer 2020 for both visitor numbers and overnight stays in tourist establishments as a whole in the Basque Country

During September 2020, both the visitors and overnight stays recorded in tourist establishments as a whole in the Basque Country fell by 58.8%, with values of 141,977 visitors and 289,414 overnight stays. Visitor numbers fell by 44% in July and by 37.6% in August, compared to the same months in 2019, and overnight stays dropped by 48.3% and 40.7%, respectively.

At the provincial level, it is worth noting the year-on-year decrease (September 2020 compared to September 2019) in Bizkaia, with 66.6% fewer visitors, resulting in a 64.5% drop in overnight stays. The next worst decrease was in Álava, with visitors falling by 55.8% and overnight stays by 52.5%. Finally, in Gipuzkoa, there was a 50.5% drop in visitors and a 54.8% reduction in overnight stays.

Visitors and overnight stays in hotels, rural accommodation and tourist apartments in the Basque Country. September 2020

	Visitors		Overnight stays	
	09/20	m/m-12 (%)	09/20	m/m-12 (%)
BASQUE COUNTRY	141.977	-58,8	289.414	-58,8
Araba/Álava	19.730	-55,8	42.671	-52,5
Bizkaia	53.999	-66,6	111.309	-64,5
Gipuzkoa	68.247	-50,5	135.433	-54,8

Source: Eustat. Survey on tourist establishments

In September, 15.1% of tourist accommodation remained closed

During the period marked by the Covid-19 health crisis, from March 2020 onwards, the **trend in the number of closed tourist accommodation establishments** reflects that the initial impact on the sector has gradually lessened, although in the summer months the percentage of closed establishments was still more than double that seen in the previous year. As such, the figure for establishments that were completely closed varied from 90.5% in April 2020 to 17.7% in July, 14.7% in August and 15.1% in September

Tourist accommodations that have been closed (%). COVID19 period

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
	2020	2019	2020	2019	2020	2019	2020	2019
September	15,1	6,2	17,7	7,6	16,0	6,2	13,5	5,6
August	14,7	6,3	17,2	7,1	14,9	5,7	13,6	6,4
July	17,7	6,4	20,7	7,1	18,3	5,7	16,1	6,7
June	36,4	7,9	36,0	7,6	35,7	7,5	37,0	8,2
May	65,0	8,7	69,0	8,6	62,5	7,8	65,2	9,4
April	90,5	8,0	92,6	9,1	87,8	6,5	91,6	8,6
March	17,8	13,0	15,8	11,7	18,2	11,5	18,2	14,5

Source: Eustat. Survey on tourist establishments

Note: Eustat would like to thank all the establishments that have collaborated with this survey and for their effort despite the extraordinary circumstances. As a result, it has been possible to disseminate this information, enabling the effects on this sector of the measures adopted in order to combat COVID-19 to be quantified.

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