

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

Overnight stays in hotel establishments in the Basque Country in November 2020 were down 79.2% compared to the same month of the previous year

A total of 243 establishments remained closed throughout November, 116 more than in October and almost at the level of June

The number of visitors registered at **hotel establishments** in the Basque Country in November, 41,367 people, dropped by 81.9% compared to same month of the previous year. The 90,493 overnight stays registered during November signified a year-on-year decrease of 79.2%. These figures represent a comparative deterioration with regard to the data observed in October, when 109,393 visitors and 209,716 overnight stays were recorded, meaning month-on-month decreases of 62.2% and 56.9%, respectively.

Visitors, overnight stays and average stay in hotel establishments in the Basque Country. November 2020

	Visitors		Overnight stays		Average stay	
	11/2020	m/m-12 (%)	11/2020	m/m-12 (%)	11/2020	11/2019
BASQUE COUNTRY	41.367	-81,9	90.493	-79,2	2,19	1,91
State origin	33.849	-78,6	73.275	-75,1	2,16	1,86
Foreign origin	7.518	-89,3	17.218	-87,8	2,29	2,02
ARABA/ÁLAVA	7.813	-74,7	18.014	-69,5	2,31	1,91
State origin	6.365	-74,3	14.945	-67,8	2,35	1,87
Foreign origin	1.448	-76,6	3.069	-75,7	2,12	2,05
Vitoria-Gasteiz	6.727	-69,3	15.402	-64,8	2,29	2,00
BIZKAIA	19.735	-82,2	46.078	-77,8	2,33	1,88
State origin	16.924	-78,1	38.074	-72,7	2,25	1,80
Foreign origin	2.811	-91,5	8.004	-88,3	2,85	2,05
Bilbao	11.922	-84,4	26.021	-81,5	2,18	1,85
GIPUZKOA	13.819	-84,1	26.401	-84,3	1,91	1,94
State origin	10.560	-81,2	20.256	-81,3	1,92	1,93
Foreign origin	3.259	-89,3	6.145	-89,8	1,89	1,98
Donostia / San Sebastián	6.698	-87,3	11.397	-88,6	1,70	1,88

Source: Eustat. Survey on tourist establishments

The negative impact of the crisis caused by COVID-19 on the hotel sector intensified during November in the three provinces. In Gipuzkoa, visitor numbers in November 2020 fell by 84.1% in relation to November 2019, in Bizkaia this decrease was 82.2% and, finally, in Álava they were down 74.7%. As regards overnight stays, the registered year-on-year decreases were as follows: 84.3% in Bizkaia, 77.8% in Gipuzkoa and 69.5% in Álava.

In November, hotel establishments in the Basque Country as a whole registered 33,849 visitors from Spain and 7,518 visitors from abroad, which was a decrease of 78.6% and 89.3%, respectively, in

respect of November 2019. Visitors coming from abroad in November 2020 represented 18.2% of total visitor numbers, whereas for the same month in 2019 this percentage rose to 30.7%.

This November the average length of stay was 2.19 days, above the average length of stay of 1.91 days observed in November 2019. Álava registered an increase from 1.91 days last year to 2.31 days in November this year; in Bizkaia the figure also increased from 1.88 days in November 2019 to 2.33 days in November 2020. In contrast, in Gipuzkoa the average length of stay was down from 1.94 days in November 2019 to 1.91 days this November.

Bed occupancy rates and profitability in hotel establishments in the Basque Country. November 2020

	Occupancy rates(%)				Profitability			
	by places		by rooms		ADR (euro)		RevPar (euro)	
	11/2020	p.p.*	11/2020	p.p.*	11/2020	m/m-12 (%)	11/2020	m/m-12 (%)
BASQUE COUNTRY	14,0	-34,5	21,2	-40,6	60,8	-24,5	12,9	-74,1
ARABA/ÁLAVA	18,7	-27,5	28,0	-32,0	56,6	-18,3	15,8	-61,8
Vitoria-Gasteiz	20,2	-28,4	30,9	-34,7	57,7	-6,5	17,8	-56,0
BIZKAIA	14,9	-33,1	22,8	-39,8	60,1	-25,2	13,7	-72,7
Bilbao	13,7	-39,5	20,5	-47,9	64,4	-27,8	13,2	-78,4
GIPUZKOA	10,9	-39,1	16,5	-44,9	64,7	-23,8	10,7	-79,5
Donostia / San Sebastián	8,9	-47,6	13,3	-54,5	81,1	-23,2	10,8	-85,0

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

Source: Eustat. Survey on tourist establishments

There was a decrease of 34.5 percentage points in the bed occupancy rate for the Basque Country overall, where it went from 48.5% in November 2019 to 14.0% in November this year. By province, bed occupancy rates stood at 18.7% for Álava, 14.9% for Bizkaia and 10.9 % for Gipuzkoa, following year-on-year decreases of 27.5, 33.1 and 39.1 percentage points, respectively.

The occupancy rate per room also dropped sharply, by 40.6 percentage points, in the Basque Country as a whole, standing at 21.2%. By province, the values recorded were 28% in Álava, 22.8% in Bizkaia and 16.5% in Gipuzkoa.

With regards to the profitability indicators of the sector, the average daily rate (ADR) of hotels in the Basque Country stood at 60.8 euros in November 2020, down 24.5% on the year before. The average room rate was 56.6 euros in Álava, where it fell 18.3%; 60.1 euros in Bizkaia, a drop of 25.2%; and 64.7 euros in Gipuzkoa, down 23.8% compared to November 2019.

The revenue per available room (RevPAR) in the Basque Country, which is dependent on the occupancy rate of hotel establishments, stood at 12.9 euros in November 2020, 74.1% down on November 2019. The RevPAR was 15.8 euros in Álava, 13.7 euros in Bizkaia and 10.7 euros in Gipuzkoa; down 61.9%, 72.7% and 79.5% on the same month of the previous year.

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

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
2020	Active	Closed	Active	Closed	Active	Closed	Active	Closed
November	389	243	48	27	159	83	182	133
October	501	127	53	22	191	49	257	56
September	525	96	54	21	198	39	273	36
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
November 2019	549	65	68	7	209	25	272	33

Source: Eustat. Survey on tourist establishments

In the Basque Country as a whole, 389 hotel establishments showed some activity during November 2020, 112 fewer than in the previous month and 160 fewer than the number that opened for at least one day in November 2019. The figure for establishments that were closed every day in November 2020 increased compared to those that were closed in October: 243 completely closed in November versus 127 in October 2020. In November 2019, however, 65 establishments were closed for the entire month.

Visitors registered at rural accommodation in the Basque Country plummeted by 93.1% and overnight stays fell by 85.5% in November 2020

In November 2020, visitors at **rural accommodation** in the Basque Country totalled 651, a year-on-year drop of 93.1%. Overnight stays, which numbered 3,017 people, fell by 85.5% compared to those registered in November 2019.

Visitors, overnight stays, average stay and occupancy rates in rural accommodation in the Basque Country. November 2020

	Visitors		Overnight stays		Average stay		Occupancy rates(%)			
	11/2020	m/m-12 (%)	11/2020	m/m-12 (%)	11/2020	11/2019	by places		by rooms	
							11/2020	p.p.*	11/2020	p.p.*
BASQUE COUNTRY	651	-93,1	3.017	-85,5	5	2,2	3	-13,9	5	-13,8
State origin	574	-93,1	2.653	-85,4	5	2,2	-	-	-	-
Foreign origin	77	-93,1	364	-86,1	5	2,3	-	-	-	-
ARABA/ÁLAVA	79	-96,4	386	-91,6	5	2,1	2	-13,9	3	-14,1
State origin	77	-96,4	384	-91,5	5	2,1	-	-	-	-
Foreign origin	2	-96,6	2	-97,7	1	1,5	-	-	-	-
BIZKAIA	204	-91,6	719	-86,3	4	2,2	2	-12,5	5	-12,7
State origin	177	-91,6	655	-85,4	4	2,1	-	-	-	-
Foreign origin	27	-91,4	64	-91,8	2	2,5	-	-	-	-
GIPUZKOA	368	-92,3	1.912	-82,6	5	2,3	4	-14,8	7	-14,3
State origin	320	-92,1	1.614	-82,6	5	2,3	-	-	-	-
Foreign origin	48	-93,5	298	-82,9	6	2,4	-	-	-	-

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

Source: Eustat. Survey on tourist establishments

All three provinces experienced severe decreases. Visitor numbers fell by 96.4% in Álava, 92.3% in Gipuzkoa and 91.6% in Bizkaia. Overnight stays performed similarly, with negative variations of 91.6% in Álava, 82.6% in Bizkaia and 86.3% in Gipuzkoa.

The number of rural tourism establishments that offered accommodation at some point in November rose to 312, compared to the 365 that did so in November 2019. Conversely, a total of 125 establishments remained closed during the entire period, as opposed to the 57 that were closed in November 2019.

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

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
2020	Active	Closed	Active	Closed	Active	Closed	Active	Closed
November	312	125	79	27	84	47	149	51
October	356	78	89	17	105	25	162	36
September	363	66	93	12	107	23	163	31
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
November 2019	365	57	95	7	103	26	167	24

Source: Eustat. Survey on tourist establishments

Similarly, a reduction in activity was also observed in respect of the previous month. There were 356 active rural tourism establishments in October 2020 as opposed to the 312 registered in November 2020, whilst the number of establishments closed during the entire month went from 78 in October to 125 in November 2020.

Note: Eustat would like to thank all the establishments that have collaborated with this survey for making this effort despite the extraordinary current 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.

For further information:

Eustat - Euskal Estatistika Erakundea / Basque Statistics Institute
 C/ Donostia-San Sebastián, 1 01010 Vitoria-Gasteiz
 Press Service: servicioprensa@eustat.es Tel: 945 01 75 62