

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

At the close of 2020, hotels, rural accommodation and tourist apartments as a whole in the Basque Country had 4 million fewer overnight stays than in 2019

The number of tourist establishments closed every day in December 2020 in the Basque Country was around 36% of the total

During **2020**, activity in terms of the number of visitors and overnight stays at tourist establishments as a whole included in the survey (hotel establishments, rural accommodation and tourist apartments) shows the direct effect that the measures adopted to tackle the crisis caused by COVID-19 have had on the tourism sector. 2020 closed with a total of 1,351,804 visitors and 2,820,063 overnight stays, a decrease on 2019 of 60.7% and 59.8%, respectively.

In Gipuzkoa, the number of visitors fell by 56.6% throughout the year and overnight stays were down 57.9%, in Álava they fell by 58.7% and 54.6% and, lastly, in Bizkaia the number of visitors and overnight stays in 2020 dropped 64.8% and 63.2% compared to the year before.

When analysed by origin or residence, the steepest drops were observed in the number of visitors and overnight stays of people from abroad, at 73.3% and 74.0%, respectively. The drop in the number of foreign visitors was more pronounced in Bizkaia.

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

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
	2020	2020/2019 (%)	2020	2020/2019 (%)	2020	2019	by places		by rooms / apartments	
							2020	p.p.*	2020	p.p.*
BASQUE COUNTRY	1.351.804	-60,7	2.820.063	-59,8	2,09	2,04	30,1	-22,2	39,4	-25,1
State origin	975.372	-52,0	2.073.721	-50,0	2,13	2,04	-	-	-	-
Foreign origin	376.431	-73,3	746.342	-74,0	1,98	2,04	-	-	-	-
ARABA/ÁLAVA	190.314	-58,7	430.920	-54,6	2,26	2,06	26,6	-16,1	39,0	-18,6
State origin	155.042	-53,6	357.126	-48,9	2,30	2,09	-	-	-	-
Foreign origin	35.272	-72,0	73.794	-70,4	2,09	1,98	-	-	-	-
BIZKAIA	568.588	-64,8	1.176.977	-63,2	2,07	1,98	28,8	-24,7	38,5	-27,5
State origin	424.929	-55,7	880.964	-53,2	2,07	1,96	-	-	-	-
Foreign origin	143.658	-78,1	296.012	-77,5	2,06	2,00	-	-	-	-
GIPUZKOA	592.902	-56,6	1.212.166	-57,9	2,04	2,11	33,0	-22,0	40,6	-24,8
State origin	395.401	-46,4	835.631	-46,7	2,11	2,13	-	-	-	-
Foreign origin	197.501	-68,6	376.535	-71,3	1,91	2,09	-	-	-	-

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

Source: Eustat. Survey on tourist establishments

The yearly average length of stay in 2020 was 2.09, slightly higher than the average recorded in 2019, which was 2.04 days. At the provincial level, Álava came out top with 2.26, and Bizkaia and Gipuzkoa posted figures similar to the Basque Country average: 2.07 and 2.04 days, respectively.

The bed occupancy rate fell by 22.2 percentage points on 2019, standing at 30.1% in 2020. The room/apartment occupancy rate was 39.4% after falling 25.1 percentage points compared to the previous year.

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

	BASQUE COUNTRY		ARABA/ÁLAVA		BIZKAIA		GIPUZKOA	
	2020	2019	2020	2019	2020	2019	2020	2019
December	35,8	6,1	29,4	11,6	36,5	14,8	37,6	12,8
November	34,0	11,5	29,4	7,5	34,2	13,6	35,4	11,5
October *	18,8	7,7	20,6	6,6	19,4	7,4	17,8	8,3
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

* Revised data

The variation in the number of establishments completely closed in the months of 2020 reveals that, after the near-total closure in April and, to a lesser extent, in May, there was a slight change in trend, as the number of establishments closed in August 2020 stood at 14.7%. From then, owing to restrictions on travel and group sizes, establishments' supply fell from one month to the next, and the year ended with 35.8% of tourist establishments closed for the whole month of December.

Visitors, overnight stays, average stay and occupancy rates in hotels, rural accommodation and tourist apartments in the Basque Country. December 2020

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
	12/2020	m/m-12 (%)	12/2020	m/m-12 (%)	12/2020	12/2019	by places		by rooms/apartments	
							12/2020	p.p.*	12/2020	p.p.*
BASQUE COUNTRY	59.720	-73,6	118.691	-72,5	1,99	1,91	14,2	-26,0	20,8	-28,3
State origin	49.204	-69,8	97.167	-69,1	1,97	1,93	-	-	-	-
Foreign origin	10.515	-83,3	21.524	-81,7	2,05	1,87	-	-	-	-
ARABA/ÁLAVA	9.016	-72,2	22.885	-65,0	2,54	2,02	15,3	-20,3	25,3	-22,3
State origin	7.274	-73,7	18.938	-66,2	2,60	2,02	-	-	-	-
Foreign origin	1.742	-63,3	3.947	-58,4	2,27	2,00	-	-	-	-
BIZKAIA	29.710	-73,4	54.261	-73,9	1,83	1,86	14,5	-27,5	20,5	-30,5
State origin	26.466	-67,6	46.892	-68,9	1,77	1,84	-	-	-	-
Foreign origin	3.244	-89,1	7.369	-87,1	2,27	1,92	-	-	-	-
GIPUZKOA	20.994	-74,5	41.545	-73,9	1,98	1,94	13,3	-26,7	19,2	-28,2
State origin	15.464	-71,2	31.337	-70,9	2,03	2,00	-	-	-	-
Foreign origin	5.529	-80,5	10.208	-80,2	1,85	1,81	-	-	-	-

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

Source: Eustat. Survey on tourist establishments

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In **December 2020**, it was observed that the decreases compared to the same month of the previous year (December 2019) were 73.6% in the case of visitor numbers and 72.5% in the case of overnight stays. At the provincial level, the negative variations were similar in the case of visitor numbers, where they exceeded 70% across the board. The fall in the number of overnight stays varied between 65.0% in Álava to 73.9% in both Bizkaia and Gipuzkoa. Bizkaia was the province most affected by the decline in the number of visitors and overnight stays of people from abroad, with drops of 89.1% and 87.1%, respectively, compared to December 2019.

The average length of stay in December 2020 was slightly higher than that recorded in December 2019, at 1.99 days. The bed occupancy rate stood at around 14.2% for the Basque Country as a whole, with a drop of 26 percentage points on December 2019. The rate per room/apartment was calculated at 20.8%, following a year-on-year downturn of 28.3 percentage points.

Tourist apartments

The **2020 annual balance** for tourist apartments fell slightly less than for tourist establishments as a whole included in the survey (hotels and guesthouses, rural accommodation and tourist apartments). The 45,520 visitors and 204,966 overnight stays recorded throughout the year were down 49.4% and 36.9%, respectively. The smallest decrease compared to the previous year was observed in Álava, with a drop of 39.5% in visitor numbers and 28.3% in overnight stays.

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

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
	2020	2020/2019 (%)	2020	2020/2019 (%)	2020	2019	by places		by apartments	
							2020	p.p.*	2020	p.p.*
BASQUE COUNTRY	45.520	-49,4	204.966	-36,9	4,50	3,61	22,5	-10,1	48,0	-15,7
State origin	37.168	-38,3	161.408	-26,4	4,34	3,64	-	-	-	-
Foreign origin	8.351	-71,9	43.558	-58,7	5,22	3,55	-	-	-	-
ARABA/ÁLAVA	6.898	-39,5	62.256	-28,3	9,03	7,62	20,9	-4,7	55,3	-11,7
State origin	6.277	-36,5	52.506	-21,6	8,36	6,77	-	-	-	-
Foreign origin	621	-58,9	9.750	-51,0	15,70	13,17	-	-	-	-
BIZKAIA	22.706	-50,6	73.541	-41,0	3,24	2,71	21,9	-15,1	43,6	-18,8
State origin	18.945	-39,0	57.063	-31,3	3,01	2,67	-	-	-	-
Foreign origin	3.760	-74,7	16.477	-60,4	4,38	2,80	-	-	-	-
GIPUZKOA	15.916	-51,2	69.169	-38,9	4,35	3,47	25,1	-10,6	46,0	-15,5
State origin	11.946	-38,2	51.839	-25,1	4,34	3,58	-	-	-	-
Foreign origin	3.970	-70,2	17.330	-60,5	4,37	3,30	-	-	-	-

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

Source: Eustat. Survey on tourist establishments

In 2020, the average length of stay was 4.5 days in the Basque Country as a whole, which was higher than the 3.61 days observed in 2019.

The bed occupancy rate also registered a negative variation of 10.1 percentage points compared to 2019, standing at 22.5% for the Basque Country as a whole. The apartment occupancy rate reached 48.0% after falling 15.7 percentage points compared to 2019.

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The last month of the year, December 2020, closed with 2,223 visitors and 16,353 overnight stays in tourist establishments as a whole in the Basque Country. These figures represent a reduction of 65.0% for visitor numbers and 26.0% for overnight stays, compared to December 2019.

By province, visitor numbers fell by 64.9%, 61.1% and 71.1% in Álava, Bizkaia and Gipuzkoa, respectively. The falls in overnight stays compared to December 2019 were uneven, with year-on-year drops of 23.4% in Álava, 49.3% in Bizkaia and 1.9% in Gipuzkoa.

Visitors, overnight stays, average stay and occupancy rates in tourist apartments in the Basque Country. December 2020

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
	12/2020	m/m-12 (%)	12/2020	m/m-12 (%)	12/2020	12/2019	12/2020	p.p.*	12/2020	p.p.*
BASQUE COUNTRY	2.223	-65,0	16.353	-26,0	7,36	3,48	17,2	-9,5	39,0	-14,3
State origin	1.979	-60,4	13.326	-22,3	6,73	3,43	-	-	-	-
Foreign origin	243	-82,0	3.027	-38,9	12,44	3,67	-	-	-	-
ARABA/ÁLAVA	407	-64,9	5.229	-23,4	12,85	5,88	18,9	-4,2	53,5	-4,3
State origin	380	-65,2	4.360	-25,4	11,47	5,35	-	-	-	-
Foreign origin	27	-60,5	869	-12,0	31,00	14,44	-	-	-	-
BIZKAIA	1.229	-61,1	4.130	-49,3	3,36	2,58	12,0	-18,8	26,2	-23,0
State origin	1.101	-56,6	3.380	-45,7	3,07	2,45	-	-	-	-
Foreign origin	128	-79,4	750	-61,0	5,86	3,09	-	-	-	-
GIPUZKOA	587	-71,1	6.994	-1,9	11,92	3,50	21,2	-5,3	39,4	-12,9
State origin	498	-63,7	5.586	9,8	11,21	3,70	-	-	-	-
Foreign origin	88	-86,6	1.408	-31,1	15,94	3,09	-	-	-	-

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

Source: Eustat. Survey on tourist establishments

In December 2020, the figures for the average length of stay were higher than in the same month of the previous year (7.36 days in December 2020 compared to 3.48 days in December 2019), especially in Álava and Gipuzkoa.

Occupancy rates, on the other hand, dropped considerably in December 2020. In the case of bed occupancy calculated by rooms/apartments, this fell 9.5 percentage points to 17.2% and, although the occupancy rate of apartments stood at 39.0%, it had fallen by 14.3 percentage points compared to December 2019.

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.

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