

Overnight stays hotel establishments in the Basque Country increased by 5.8% in March 2021

31.6% of hotel establishments did not have any business on any day in March 2021

In March 2021, the number of overnight stays recorded at hotel establishments in the Basque Country rose to 158,966, up 5.8% on March 2020, according to Eustat data. The year-on-year upturn in visitor numbers stood at 33.1%, with 89,930 visitors in March 2021.

To understand the intensity of these year-on-year variations, we must bear in mind that on 14 March 2020, a state of emergency was decreed in response to the COVID19 pandemic, which restricted movement to only essential activities.

At the provincial level, Álava recorded a 90.7% increase in visitor numbers and 48.6% in overnight stays in March 2021 compared to March 2020. In Bizkaia, visitor numbers rose by 17.2% and overnight stays were down 5.1%. In the case of Gipuzkoa, the number of visitors and overnight stays in March 2021 increased by 34.5% and 4.9%, respectively.

Visitors, overnight stays and average stay in hotel establishments in the Basque Country. March 2021

	Visitors		Overnight stays		Average stay	
	03/2021	m/m-12 (%)	03/2021	m/m-12 (%)	03/2021	03/2020
BASQUE COUNTRY	89.930	33,1	158.966	5,8	1,77	2,22
State origin	76.710	79,4	133.222	41,5	1,74	2,20
Foreign origin	13.220	-46,7	25.744	-54,1	1,95	2,26
ARABA/ÁLAVA	15.438	90,7	29.214	48,6	1,89	2,43
State origin	13.562	124,1	25.512	69,7	1,88	2,48
Foreign origin	1.876	-8,2	3.702	-20,0	1,97	2,26
Vitoria-Gasteiz	11.027	90,9	22.215	46,8	2,01	2,62
BIZKAIA	37.025	17,2	67.943	-5,1	1,84	2,27
State origin	32.835	67,0	58.324	36,4	1,78	2,17
Foreign origin	4.190	-64,9	9.619	-66,7	2,30	2,42
Bilbao	23.348	6,3	40.091	-13,5	1,72	2,11
GIPUZKOA	37.467	34,5	61.809	4,9	1,65	2,12
State origin	30.313	77,8	49.386	35,9	1,63	2,13
Foreign origin	7.154	-33,7	12.423	-45,0	1,74	2,09
Donostia / San Sebastián	21.579	28,2	34.025	-0,2	1,58	2,03

Source: Eustat. Survey on tourist establishments

A very uneven performance was observed in both the number of visitors and overnight stays depending on the person's habitual residence. The number of visitors from abroad fell by 46.7% compared to March 2020, whereas those from the rest of Spain increased by 79.4%. In the case of overnight stays, there was a decrease of 54.1% in the number of people residing abroad, whereas the number of overnight stays of people from the rest of Spain rose by 41.5%.

The average length of stay fell compared to March of the previous year, going from 2.22 days last March to 1.77 this March. In Gipuzkoa, it dropped from 2.12 days in March 2020 to 1.65 days in

March 2021, and in Bizkaia it fell from 2.27 days to 1.84 days. In Álava there was a sharper decline, going from an average stay of 2.43 days in March 2020 to 1.89 days in March 2021.

Bed occupancy rates and profitability in hotel establishments in the Basque Country. March 2021

	Occupancy rates(%)				Profitability			
	by places		by rooms		ADR (euro)		RevPar (euro)	
	03/2021	p.p.*	03/2021	p.p.*	03/2021	m/m-12 (%)	03/2021	m/m-12 (%)
BASQUE COUNTRY	22,4	-7,5	30,3	-9,2	65,78	-3,7	19,96	-26,1
ARABA/ÁLAVA	24,7	0,6	34,0	-0,4	59,97	5,0	20,37	3,9
Vitoria-Gasteiz	24,7	0,7	35,7	0,6	58,92	9,2	21,02	11,1
BIZKAIA	20,1	-9,7	28,3	-12,2	63,05	-10,7	17,86	-37,6
Bilbao	18,9	-12,5	25,5	-16,0	65,50	-14,5	16,71	-47,4
GIPUZKOA	24,3	-8,4	31,4	-9,1	71,90	3,6	22,56	-19,7
Donostia / San Sebastián	26,3	-8,7	32,8	-9,2	83,14	0,9	27,29	-21,1

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

Source: Eustat. Survey on tourist establishments

Bed and room occupancy rates of hotel establishments with business in March followed a downward trend in year-on-year terms. There was a 7.5 percentage point drop in the case of the bed occupancy rate and 9.2 in the room occupancy rate.

By province, Bizkaia saw the largest decreases both in the case of bed occupancy, which was down 9.7 percentage points on March 2020, and in room occupancy, which fell by 12.2 percentage points. The provincial capital that suffered the most in March was Bilbao, with falls in the bed and room occupancy rates of 12.5 and 16.0 percentage points respectively.

The profitability indicators of the sector, even with an uneven yet moderate variation in the average daily rate (ADR) by province, continue to show the effect of the health crisis on the hotel sector. In March, the revenue per available room (RevPAR) in the Basque Country decreased by 26.1% in year-on-year terms to 19.96 euros. The decreases recorded were 37.6% in Bizkaia and 19.7% in Gipuzkoa, whereas in Álava it was up 3.9%. By provincial capitals, there were drops of 47.4% in Bilbao and 21.1% in San Sebastián, while there was an increase of 11.1% in Vitoria-Gasteiz.

Hotel establishments that have been closed (%)

	BASQUE COUNTRY			ARABA/ÁLAVA			BIZKAIA			GIPUZKOA			
	2021	2020	2019	2021	2020	2019	2021	2020	2019	2021	2020	2019	
	January	42,7	18,2	16,9	41,3	18,7	18,7	38,8	16,2	14,1	46,0	19,7	18,6
February		42,2	15,1	16,7	42,1	16,0	21,3	37,2	15,0	13,7	46,0	15,1	17,9
March	31,6	14,1	10,5	25,0	17,3	14,7	28,9	12,7	8,7	35,2	14,3	10,8	
April		91,0	5,7		92,0	13,3		87,7	3,5		93,2	5,6	
May		69,6	6,7		73,3	12,0		66,1	4,7		71,3	6,9	
June		39,8	5,9		38,7	9,3		40,0	5,6		39,9	5,2	
July		17,6	5,4		26,7	9,3		18,3	4,7		14,9	4,9	
August		14,2	5,1		26,7	9,3		14,0	4,3		11,3	4,6	
September		15,5	4,9		28,0	9,3		16,5	4,7		11,7	3,9	
October		20,2	6,3		29,3	9,3		20,4	5,1		17,9	6,6	
November		38,4	10,6		36,0	9,3		34,3	10,7		42,2	10,8	
December		41,1	12,2		36,0	13,3		38,4	11,5		44,4	12,5	

Source: Eustat. Survey on tourist establishments

The variation in the percentage of hotel establishments closed every day of the month shows that the impact on the hotel sector of the restrictions adopted to tackle COVID-19, while still significant, had improved slightly. In March 2021, 31.6% of hotel establishments remained closed every day of the month, an increase of 17.5 percentage points on March 2020 and 21.1 points more than in March 2019. In Gipuzkoa, 35.2% of establishments had no business at all in March 2021, while in Bizkaia it was 28.9% and in Álava, 25.0%.

Informative note

The coverage of the ETR for Hotels in March was **93.7%**. Eustat would like to thank all establishments that participated in this survey for their effort.

For further information:

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