

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. December 2021

Hotel establishments recovered in 2021 compared to 2020 but did not reach the occupancy figures registered in 2019 in the Basque Country

In December 2021, visitor numbers and overnight stays tripled in year-on-year terms and represented, respectively, 87.1% and 87.7% of those registered in December 2019

The 2021 annual balance, the second year marked by the COVID-19 pandemic, despite registering an increase of 75.5% in visitor numbers and 73.4% in overnight stays in respect of 2020 in hotel establishments in the Basque Country, did not recover the figures obtained in 2019, according to Eustat data.

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

	Visitors		Overnight stays		Average stay	
	2021	p/p-1 (%)	2021	p/p-1 (%)	2021	2020
BASQUE COUNTRY	2.172.927	75,5	4.178.716	73,4	1,92	1,95
State origin	1.536.502	75,4	2.996.608	73,6	1,95	1,97
Foreign origin	636.425	75,9	1.182.108	72,9	1,86	1,89
Araba/Álava	315.601	83,1	610.063	80,3	1,93	1,96
State origin	251.408	82,1	494.833	79,9	1,97	1,99
Foreign origin	64.193	87,3	115.230	81,8	1,80	1,85
Vitoria-Gasteiz	228.943	88,4	460.741	83,2	2,01	2,07
Bizkaia	952.191	80,6	1.831.983	75,1	1,92	1,99
State origin	696.365	79,2	1.343.825	74,3	1,93	1,98
Foreign origin	255.826	84,8	488.158	77,3	1,91	1,99
Bilbao	631.481	80,6	1.191.971	81,5	1,89	1,88
Gipuzkoa	905.135	68,0	1.736.670	69,4	1,92	1,90
State origin	588.729	68,5	1.157.950	70,3	1,97	1,95
Foreign origin	316.406	67,2	578.720	67,7	1,83	1,82
Donostia / San Sebastian	553.626	74,5	1.074.157	80,7	1,94	1,87

p/p-1 Year-on-year rate of change in the last observed period (p) with respect to the same period of the previous year (p-1)

Date January 21, 2022

Source: Eustat Tourist accommodating establishments survey

Throughout 2021, the number of visitors registered in hotel establishments in the Basque Country rose to 2,172,927, creating a total of 4,178,716 overnight stays. These figures, in effect, reached

68.2% of those observed in 2019 in the case of visitor numbers and 66.7% in that of overnight stays.

In respect of 2020, however, there was a significant increase in both variables, with growth rates of around 75% at the Basque Country level. By province, growth was generalised. In the case of Álava, visitor numbers and overnights stays increased by 83.1% and 80.3%, respectively. In Bizkaia, visitor numbers rose by 80.6% and overnight stays by 75.1%; and in Gipuzkoa, the variations were 68.0% in the case of visitor numbers and 69.4% in that of overnight stays.

The capitals have evolved in a similar manner, visitor numbers increasing in 2021 compared to 2020 by 88.4% in Vitoria-Gasteiz, 80.6% in Bilbao and 74.5% in San Sebastián, and overnight stays increasing by 83.2%, 81.5% and 80.7%, respectively.

The average length of stay in 2021 at the Basque Country level stood at 1.92 days, slightly below the 1.95 days registered in 2020 and also below the 1.97 days of 2019.

At the provincial level, the values obtained in average length of stay were also 1.92 days, except in Álava, where said value was surpassed by one tenth, standing at 1.93 days for 2021 as a whole.

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

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	2021	p.p. *	2021	p.p. *	2021	p/p-1 (%)	2021	p/p-1 (%)
BASQUE COUNTRY	41,1	8,3	48,8	7,8	89,44	21,9	43,66	45,0
Araba/Álava	40,5	8,6	50,8	9,0	76,19	24,4	38,72	51,1
Vitoria-Gasteiz	40,7	8,2	53,2	8,4	66,20	19,3	35,19	41,6
Bizkaia	38,4	7,9	46,4	6,9	78,56	17,4	36,49	37,9
Bilbao	39,9	8,5	46,8	7,1	83,60	18,0	39,16	39,1
Gipuzkoa	44,5	8,7	51,0	8,5	106,47	25,2	54,27	50,2
Donostia / San Sebastian	48,9	10,2	54,1	10,3	128,44	26,4	69,46	56,1

p/p-1 Year-on-year rate of change in the last observed period (p) with respect to the same period of the previous year (p-1)

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

Date January 21, 2022

Source: Eustat Tourist accommodating establishments survey

The bed occupancy rate in hotel establishments in the Basque Country stood at 41.1% in 2021, and in the case of rooms at 48.8%, which meant an increase of 8.3 and 7.8 percentage points in relation to 2020, respectively.

In Gipuzkoa the bed occupancy rate reached, for the year as a whole, 44.5%, in Álava it stood at 40.5% and in Bizkaia at 38.4%. The capitals saw values slightly higher than those of their respective provinces.

The room occupancy rate was 51.0% in Gipuzkoa, 50.8% in Álava and, finally, 46.4% in Bizkaia. In respect of the capitals, San Sebastian achieved a room occupancy rate of 54.1%, Vitoria-Gasteiz of 53.2% and Bilbao of 46.8%.

Profitability indicators improved throughout 2021 in respect of those observed the previous year. The average daily rate or ADR in the Basque Country, following an annual increase of 21.9% stood at 89.44 euros. In the case of the RevPAR the value in 2021 was 43.66 euros, which represented an increase of 45.0% in relation to 2020.

December 2021

The number of visitors and overnight stays registered in hotel establishments in the Basque Country during December 2021 rose to 181,836 and 336,886, respectively.

The revival in the hotel sector in relation to December 2020 therefore stood at 221.6% in the case of visitor numbers and at 239.0% in that of overnight stays, however visitor numbers in December 2021 represented 87.1% of those of December 2019 and overnight stays 87.7%.

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

	Visitors		Overnight stays		Average stay	
	12/2021	m/m-12 (%)	12/2021	m/m-12 (%)	12/2021	12/2020
BASQUE COUNTRY	181.836	221,6	336.886	239,0	1,85	1,76
State origin	131.545	183,9	245.313	202,6	1,86	1,75
Foreign origin	50.291	393,3	91.573	400,0	1,82	1,80
Araba/Álava	27.177	220,9	52.209	204,6	1,92	2,02
State origin	22.532	233,6	43.445	208,9	1,93	2,08
Foreign origin	4.645	171,2	8.764	184,9	1,89	1,80
Vitoria-Gasteiz	21.384	183,2	42.696	176,9	2,00	2,04
Bizkaia	83.654	196,3	157.303	219,0	1,88	1,75
State origin	64.741	157,2	119.891	180,0	1,85	1,70
Foreign origin	18.913	518,3	37.412	475,3	1,98	2,13
Bilbao	58.978	188,0	110.073	236,5	1,87	1,60
Gipuzkoa	71.005	257,9	127.374	286,8	1,79	1,66
State origin	44.272	207,1	81.977	238,8	1,85	1,68
Foreign origin	26.733	393,0	45.397	419,7	1,70	1,61
Donostia / San Sebastian	48.974	314,4	87.342	381,4	1,78	1,54

m/m12 Rate of year-on-year change in the last observed month (m) compared to the same month of the previous year (m-12)

Date January 21, 2022

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 27,177 visitors and 52,209 overnight stays in December 2021, 220.9% and 204.6% more than in the same month of the previous year, respectively. In Bizkaia, visitor numbers

increased by 196.3% and overnight stays were up 219.0% in December 2021, reaching a total of 83,654 visitors and 157,303 overnight stays. Lastly, in Gipuzkoa, the number of visitors and overnight stays stood at 71,005 and 127,374 in December 2021, following a year-on-year rise of 257.9% in visitor numbers and 286.8% in overnight stays. Of particular note was the increase in foreign visitor numbers and overnight stays in the Basque Country as a whole, having practically quintupled the values observed in December 2020.

The average length of stay in December 2021 was 1.85 days in the Basque Country as a whole, above that obtained in the same month of 2020, which was 1.76 days. In December 2019 this variable stood at 1.84 days.

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

	Occupancy rates (%)				Profitability				
	by seats		by rooms		ADR (euros)		RevPAR (euros)		
	12/2021	p.p. *	12/2021	p.p. *	12/2021	m/m-12 (%)	12/2021	m/m-12 (%)	
BASQUE COUNTRY	36,2	20,5	42,6	21,3	75,62		21,4	32,23	142,0
Araba/Álava	38,5	20,6	48,4	22,2	69,24		20,5	33,50	123,0
Vitoria-Gasteiz	40,5	20,4	52,7	23,0	60,18		4,4	31,71	85,3
Bizkaia	36,0	20,2	43,2	21,8	73,47		23,0	31,75	147,5
Bilbao	38,6	21,9	44,9	22,9	78,37		26,1	35,22	157,6
Gipuzkoa	35,6	21,1	39,8	20,6	81,21		17,8	32,36	143,5
Donostia / San Sebastian	40,1	24,9	43,2	23,6	91,66		12,5	39,61	147,3

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

m/m12 Rate of year-on-year change in the last observed month (m) compared to the same month of the previous year (m-12)

Date January 21, 2022

Source: Eustat Tourist accommodating establishments survey

As regards the occupancy rates in December 2021, figures for the Basque Country as a whole reached 36.2% in the case of beds and 42.6% in that of rooms. Compared to December 2020, the increases stood at 20.5 and 21.2 percentage points, respectively. In relation to December 2019, however, the bed occupancy rate was down 7.9 percentage points and the room occupancy rate fell by 9.5 percentage points.

Profitability, measured using the ADR or average daily rate, in the Basque Country as a whole reached 75.62 euros in December 2021. At the provincial level, Gipuzkoa stood out with 81.21 euros, followed by Bizkaia with 73.47 euros and Álava with 69.24 euros. By provincial capitals, the ADR rose to 91.66 euros in San Sebastián, 78.37 euros in Bilbao and 60.18 euros in Vitoria-Gasteiz. All these figures imply some significant year-on-year increases, of 26.1% in Bilbao, 12.5% in San Sebastian and 4.4% in Vitoria-Gasteiz. In December 2019 the ADR for the whole of the Basque Country stood at 76,79 euros, 1.17 euros more than in December 2021.

Finally, the RevPar at the Basque Country level was 32.23 euros in December 2021, 18.91 euros above that registered in December 2020. In the case of Álava, it reached 33.50 euros, in Gipuzkoa it was 32.36 euros and in Bizkaia it stood at 31.75 euros. The percentage increase in respect of the

same month of 2020 showed significant improvements, with 147.5% Bizkaia, 143.5% in Gipuzkoa and 123.0% in Álava.

Note

The coverage of the ETR for Hotels in December 2021 was **81.0%**. Eustat would like to thank all establishments that participated in this survey for their effort.

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