

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. March 2024

Overnight stays in hotel establishments in the Basque Country rose by 19.5% in March 2024, which included Easter this year

The average daily rate was 92.68 euros in March 2024 in the Basque Country, which represented a rise of 9.5% compared to March 2023

In **March 2024**, visitor numbers at hotel establishments in the Basque Country increased by 16.5% and overnight stays were up 19.5%, according to Eustat data. The 300,688 registered visitors gave rise to a total of 575,846 overnight stays. It should be borne in mind that in 2024 Easter took place in March, while in 2023 it was in April.

Foreign tourists accounted for 38.2% of visitors and 39.3% of overnight stays, following rises of 28.9% in the case of visitors and 31.1% in that of overnight stays. In turn, the number of visitors and overnight stays from the rest of Spain increased in year-on-year terms by 10.0% and 13.0% respectively.

Visitors, overnight stays and average stay in hotel establishments in the Basque Country. March 2024

	Visitors		Overnight stays		Average stay	
	03/2024	m/m-12 (%)	03/2024	m/m-12 (%)	03/2024	03/2023
BASQUE COUNTRY	300.668	16,5	575.846	19,5	1,92	1,87
State origin	185.833	10,0	349.753	13,0	1,88	1,83
Foreign origin	114.835	28,9	226.093	31,1	1,97	1,94
Araba/Álava	41.645	16,1	86.206	23,3	2,07	1,95
State origin	32.282	15,6	62.595	16,4	1,94	1,93
Foreign origin	9.363	18,1	23.611	46,3	2,52	2,03
Vitoria-Gasteiz	32.720	12,9	71.323	22,3	2,18	2,01
Bizkaia	126.330	11,5	240.001	13,3	1,90	1,87
State origin	78.155	3,4	140.136	4,3	1,79	1,78
Foreign origin	48.175	27,6	99.865	28,7	2,07	2,05
Bilbao	85.866	3,1	165.261	7,7	1,92	1,84
Gipuzkoa	132.693	21,9	249.639	24,7	1,88	1,84
State origin	75.396	15,2	147.022	21,1	1,95	1,85
Foreign origin	57.297	32,0	102.617	30,2	1,79	1,82
Donostia / San Sebastian	91.195	25,8	171.490	32,2	1,88	1,79

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 April 22, 2024

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 41,645 visitors and 86,206 overnight stays, 16.1% and 23.3% more than in March the previous year. In Bizkaia, growth reached 11.5% in the case of visitors and 13.3% in that of overnight stays, with a total of 126,330 visitors and 240,001 overnight stays. In Gipuzkoa, 132,693 visitors were recorded in March 2024 (21.9% more than in March 2023) and there were 249,639 overnight stays (24.7% more than in the same month of the previous year).

By provincial capital, visitor numbers rose by 12.9% in Vitoria-Gasteiz, 3.1% in Bilbao and 25.8% in San Sebastián. Likewise, the increase in overnight stays compared to March of the previous year reached 22.3% in Vitoria-Gasteiz, 7.7% in Bilbao and 32.2% in San Sebastián.

The average length of stay in hotel establishments in the Basque Country during March 2024 was 1.92 days, higher than that obtained in the same month of 2023, which was 1.87 days.

The average length of stay refers to the number of days that, on average, travellers remain in each of the establishments where they stay overnight, and not the total length of their stay in the Basque Country.

Bed occupancy rates and profitability in hotel establishments in the Basque Country. March 2024

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	03/2024	p.p. *	03/2024	p.p. *	03/2024	m/m-12 (%)	03/2024	m/m-12 (%)
BASQUE COUNTRY	53,2	6,8	64,0	6,0	92,68	9,5	59,29	20,8
Araba/Álava	52,0	5,6	64,1	4,0	78,90	4,0	50,59	10,9
Vitoria-Gasteiz	54,4	5,7	69,2	4,1	68,53	3,0	47,40	9,4
Bizkaia	50,5	6,5	63,0	6,5	95,98	13,2	60,45	26,2
Bilbao	56,6	6,9	70,7	7,8	103,92	13,6	73,46	27,7
Gipuzkoa	56,6	7,2	65,0	6,0	94,02	7,3	61,11	18,2
Donostia / San Sebastian	61,9	8,5	70,6	8,5	105,53	5,0	74,54	19,4

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 April 22, 2024

Source: Eustat Tourist accommodating establishments survey

The occupancy rate in March 2024 for the Basque Country as a whole was 53.2% in the case of beds and 64.0% in that of rooms. In relation to March 2023, the increases were 6.8 and 6.0 percentage points, respectively.

Profitability, measured using the ADR or average daily rate (applied to a double room with a bathroom offered as room only accommodation), was 92.68 euros in March 2024 in the Basque Country, which was a rise of 9.5% in respect of March 2023. In the case of Bizkaia, the ADR reached 95.98 euros, in Gipuzkoa it was 94.02 euros and in Álava it stood at 78.90 euros. By provincial capital, the differences were greater, given that the ADR was 105.53 euros in San Sebastián, 103.92 euros in Bilbao and, lastly, 68.53 euros in Vitoria-Gasteiz.

The RevPar, or average revenue per available room, was 59.29 euros in hotel establishments in the Basque Country in March 2024, 20.8% higher than that obtained in the same month of the previous year.

Balance for Easter 2024

The number of visitors recorded this Easter saw a slight increase of 0.6%, with a total of 51,747. In March 2024 as a whole, Easter visitors accounted for 17.2% of the monthly total. In 2024, Easter was celebrated between 28 and 31 March, while the previous year it took place between 6 and 9 April.

The number of overnight stays registered at hotel establishments in the Basque Country during Easter, between Thursday and Sunday (4 nights), was lower than that recorded during Easter 2023. In fact, the 106,143 overnight stays observed during Easter 2024 represented a decrease of 1.8% compared to the previous year.

Occupancy rates for the Basque Country as a whole stood at 73.4% for beds and 78.4% for rooms. These percentages represented a decrease of 2.9 percentage points in the case of beds and 3.0 points in that of rooms.

In Álava, the bed occupancy rate rose by 3.7 percentage points in relation to the previous Easter, while in Gipuzkoa and Bizkaia it fell by 2.3 and 5.7 percentage points, respectively. The room occupancy rate was down in all three provinces, falling by 0.3 percentage points in Álava, 0.8 in Gipuzkoa and 6.0 in Bizkaia.

Visitors from abroad accounted for 39.4% of total visitors and 36.0% of overnight stays, increasing their numbers by 11.9% and 4.5% respectively compared to Easter 2023. Domestic tourism registered lower values than those of the previous year, with decreases of 5.7% in visitor numbers and 5.1% in overnight stays.

Visitors, overnight stays and bed occupancy rates in hotel establishments in the Basque Country by geographical area and origin. Easter (*). 2024

	Visitors		Overnight stays		Occupancy rates (%)			
	2024	2024/2023 (%)	2024	2024/2023 (%)	by seats		by rooms	
					2024	p.p. *	2024	p.p. *
BASQUE COUNTRY	51.747	0,6	106.143	-1,8	73,4	-2,9	78,4	-3,0
State origin	31.355	-5,7	67.947	-5,1	-	-	-	-
Foreign origin	20.392	11,9	38.196	4,5	-	-	-	-
ARABA/ALAVA	7.503	9,5	15.959	11,5	73,4	3,7	79,3	-0,3
Vitoria-Gasteiz	5.656	15,7	12.381	13,9	73,2	3,9	81,4	-0,2
BIZKAIA	20.937	-9,5	44.665	-9,7	69,8	-5,7	74,4	-6,0
Bilbao	13.485	-13,5	29.813	-11,8	77,8	-4,8	82,4	-3,4
GIPUZKOA	23.307	8,6	45.519	2,6	77,3	-2,3	82,4	-0,8
Donostia / San Sebastian	15.666	22,5	30.450	9,8	82,9	-1,5	88,0	0,0

(*)Easter: Thursday to Sunday (4 nights).

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

Date April 22, 2024

Source: Eustat Tourist accommodating establishments survey

By province, the performance of this Easter compared to that of the previous year was disparate. Visitor numbers increased by 9.5% in Álava and 8.6% in Gipuzkoa, while in Bizkaia they fell by 9.5%. Likewise, overnight stays were up 11.5% in Álava and 2.6% in Gipuzkoa, but down 9.7% in Bizkaia.

As regards each of the provincial capitals, Vitoria-Gasteiz saw an increase of 15.7% in visitor numbers and 13.9% in overnight stays. San Sebastián registered 22.5% more visitors and 9.8% more overnight stays than during Easter the previous year. Lastly, in Bilbao, visitor numbers fell by 13.5% while overnight stays were down 11.8%.

Note:

The response rate for the ETR for Hotels in March 2024 was **91.3%**. Eustat would like to thank all establishments that participated in this survey for their effort.

Data browser for tourism in the Basque Country. Hotel establishments**For further information:**

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