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**Bilbao
Airport**
Route
Development
Committee



Bilbao, a world benchmark in urban transformation, bringing in 1,615,918 visitors and expectations of growth in events, tourism, business and investment.

Come fly with us.

Bilbao Airport Route Development Committee



Driving air connectivity in the city of Bilbao and the province of Biscay.

It acts as go-between for the airlines and various authorities in the Basque Country to assist with growth or implementation.

MEMBERS: Basque Government, Biscay Provincial Council, Bilbao Town Hall, Aena-Bilbao Airport and Bilbao Air, along with the Chamber of Commerce.

PRESENTATION



Bloque 1

Bilbao / Bizkaia / País Vasco


- Strategic central location on the European Atlantic
- European competitive region
- Head office of leading multinationals
- Tourist destination with a prestigious brand
- Congresses and events with an international projection
- Unesco World Heritage sites
- Avant-gar de cuisine, with real appeal
- Record number of visitors
- Biscay
- Increasing visitor numbers
- Bilbao
- Hotels and accommodation
- Favourable seasonality
- Visitor profile in Biscay
- In pursuit of natural landscapes
- Rural tourism on the rise

Strategic central location on the European Atlantic

Bilbao is the capital of Biscay province, its largest city, and the Basque Country's economic and financial hub.




Biscay


1,152,651
people
live in the province of Biscay



2,217 km²
most densely populated area
of Basque Country

Basque Country


2,188,017
people
more than 52% of the population of Biscay



€33,896
PIB per cápita 2019.

Well above the figure for the State as a whole, similar to that of Europe's fully industrialised regions, and also above the EU-28 average.

European competitive region

Investment in R+ beyond the EU average.

With only 4.7% of the population of Spain, exports (chiefly to France and Germany) account for almost 9% of the total figure for the Spanish state.

Basque Country's innovation index is above the European Union average (103.6 compared to 100 for the EU).

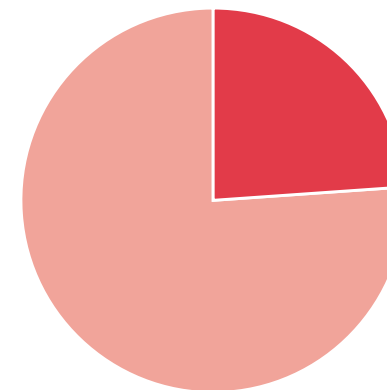
Source: SPRI



Basque industry accounts for **24.2% of GDP**, and its main features are efficiency, quality, technical excellence and its commitment to **internationalisation**.

It is a region brimming over with talent. It has renowned R+D centres working side by side with the authorities to implement new production processes, enhance current processes and deploy Industry 4.0. Foreign investment grew by 75% in the Basque Country in 2021 to reach 1,537 million €.

24.2% GDP
Basque industry



Source: ETR Survey by Eustat. In-house. 2019

The Basque Country's GDP per-capita is 24% higher than the national average and its productivity is 130%.

Head office of leading multinationals



Companies based in the Basque Country lead the way in fiercely competitive sectors such as energy, aeronautical construction and rail infrastructures, bioscience, automotive, machine tools and shipping, among others. **Companies with a strong international presence, generating a significant flow of business travellers.**



Source: In-house.

Tourist destination with a prestigious brand

The Bilbao brand has a huge capacity to draw in visitors.

Guggenheim Museum Bilbao is a world icon, one of the 20th century's major architectural creations.

Worldwide example of urban regeneration.

Guggenheim Museum Bilbao



449.477

visitors in the summer of 2022,
the best in its history

1,170,669

visitors in 2019 (precovid)

**Best
European
City
2018.**

Congresses and events with an international projection



Bilbao-Bizkaia has hosted major international events such as 'The World's 50 Best Restaurants' gala, which returns to the territory in 2021, the MTV Music ceremony, and the Rugby Challenge Cup. In the coming years, Bilbao will become the venue for the start of the Tour de France and the finals of the women's Champions League and the men's Europa League.

Unesco World Heritage sites

The Santimamiñe Cave, testimony to the earliest human art



The Way of St. James - Northern route, a pilgrim route with outstanding natural and historical heritage

The Bizkaia Transporter Bridge, one of the most outstanding examples of metal architecture from the Industrial Revolution

Avant-garde cuisine, with real appeal

A province that is home to Michelin stars, delicious pintxos (small bites), typical diches and outstanding wines such as Txakoli.

14
Michelin
stars.

Azurmendi*** / Eneko* /
Andra Mari* / Boroa* /
Etxanobe Atelier* /
Etxebarri* / Mina* /
Nerua Guggenheim* /
Zortziko* / Ola Martín
Berasategui* / Zarate* /
Ganera*


MICHELIN
2022

MICHELIN

Record number of visitors



Euskadi

4,000,000 ↑

of tourists from January to November 2022

10% more than in the same period of 2019 (precovid)

43% to Bizkaia, 41% to Gipuzkoa and 16% to Alava

3,800,000

visitors in 2019

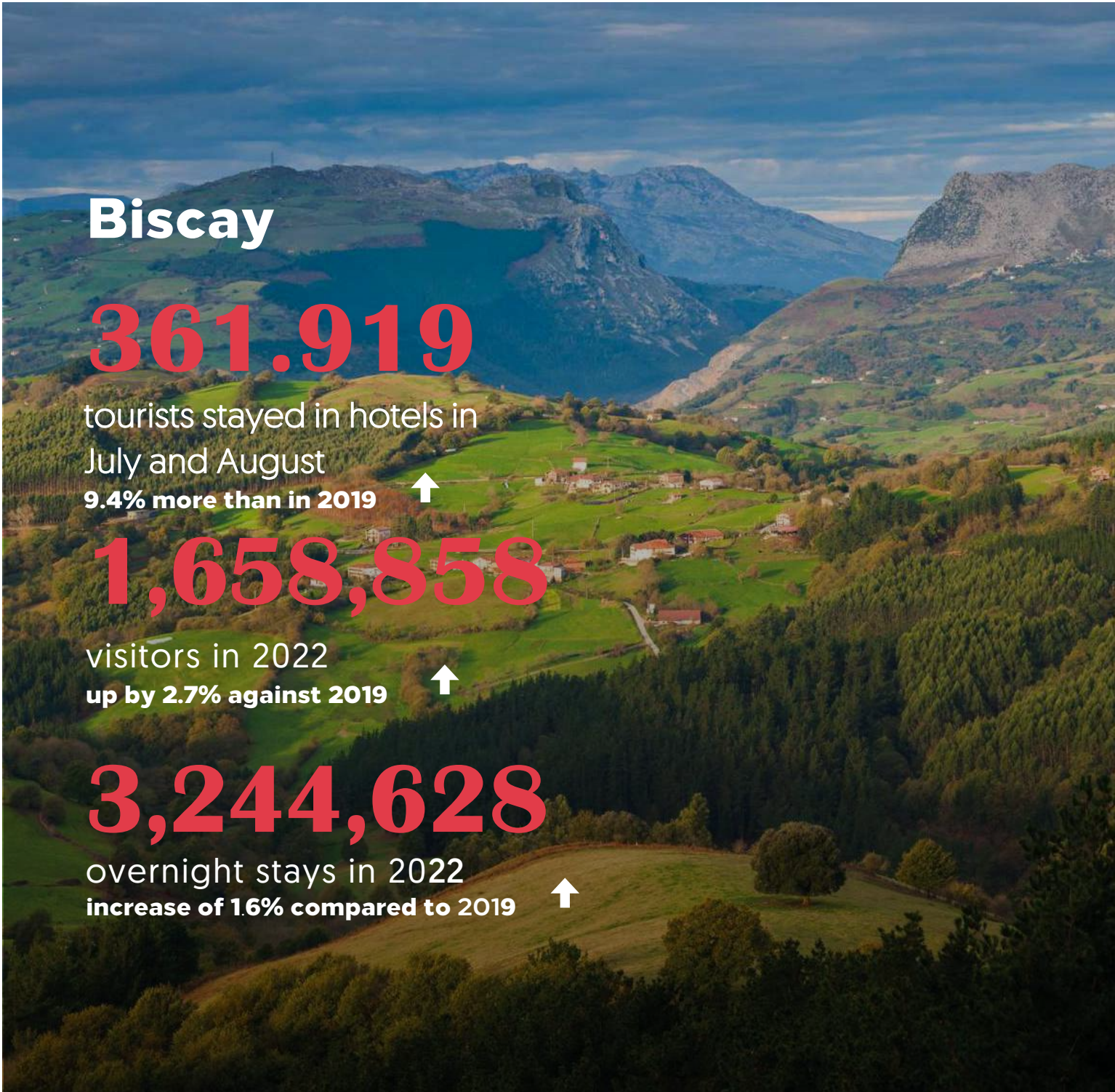
increase of 3.2% compared to 2018

7,978,593

overnight stays in 2019

up by 3.8% against 2018

Biscay



Main foreign source markets 2019 (%)

39%

Visitors, foreign market



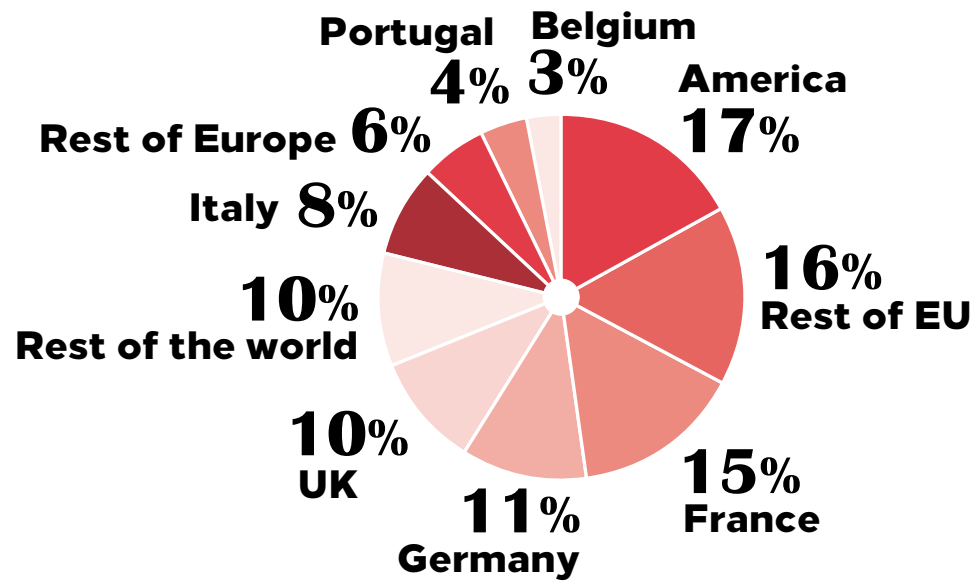
61%

Visitors, state market
Up by 5.6% against 2019



1.96

Average length of stay



Source: ETR Survey by Eustat. In-house.. 2019

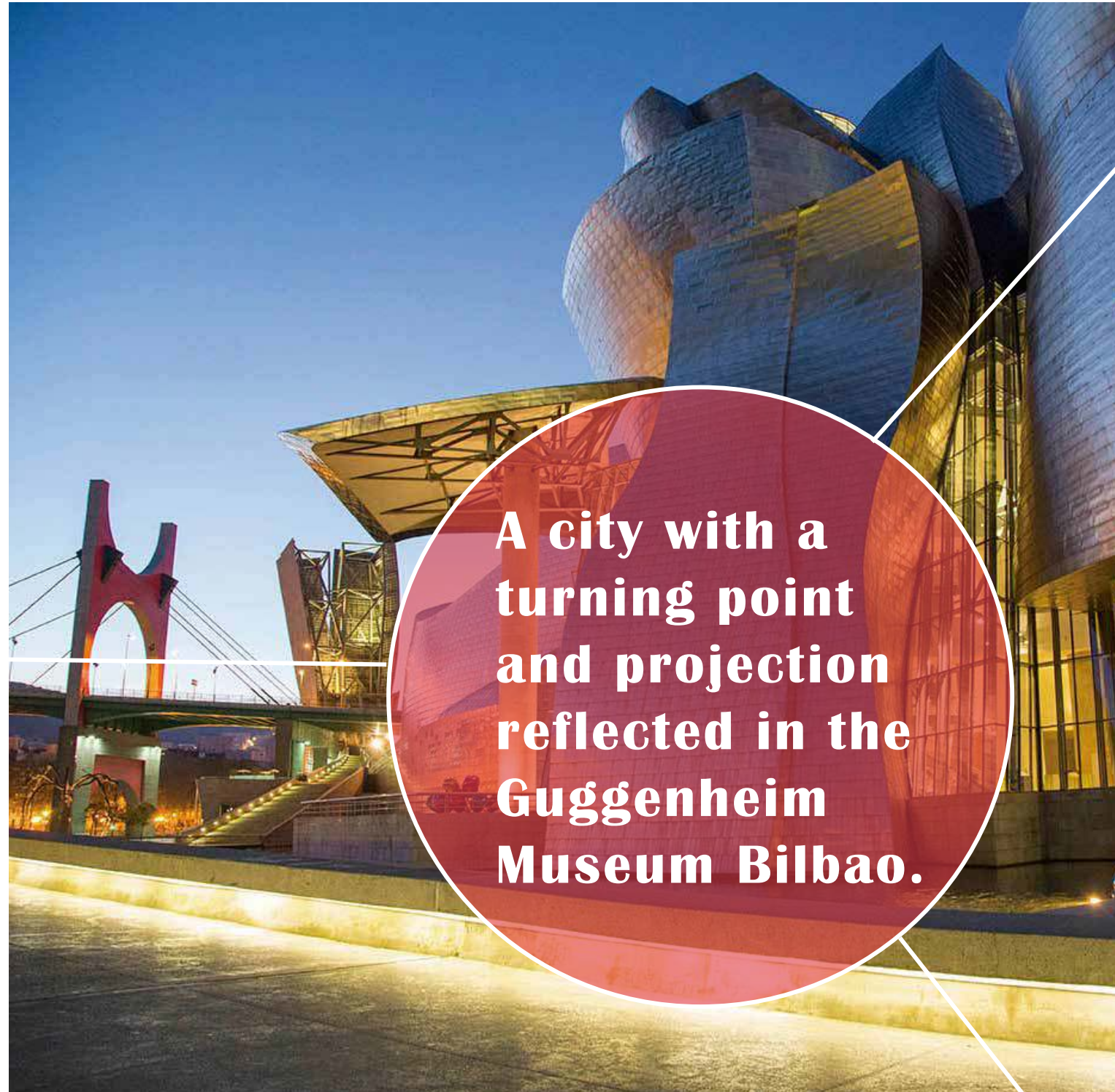
Increasing visitor numbers

year	Visitors		Overnight	
	total state	total foreign	total state	total foreign
2009	685,529	301,708	1,187,803	594,193
2010	748,129	349,911	1,358,126	674,152
2011	801,579	377,744	1,450,624	737,707
2012	774,650	399,977	1,434,623	783,117
2013	733,413	411,641	1,335,785	779,990
2014	720,635	420,197	1,372,787	816,139
2015	784,840	464,371	1,483,307	887,216
2016	842,140	499,580	1,604,000	970,955
2017	851,184	563,276	1,593,099	1,100,795
2018	865,589	597,752	1,664,326	1,193,484
2019	888,992	629,169	1,193,484	1,242,323
Var. (%)	+29.68%	+108.54%	+0.48%	+109.08%

Source: ETR Survey by Eustat. In-house. 2019



Bilbao



A city with a
turning point
and projection
reflected in the
Guggenheim
Museum Bilbao.

Bilbao's attractiveness has grown exponentially in recent years. Inbound travellers exceeded a million people in 2019. That was also the case for overnight stays, which rose from 1,746,276 to 1,977,943 over a 2-year period, according to Bizkaia Tourist Observatory data.

Bilbao

438,973

visitors from June to September 2022
up by 13.3% against 2019 ↑

Best summer of its history

1,977,943

overnights in 2019

Hotels and accommodation



The offer of hotels and accommodation in Bilbao Bizkaia has grown in parallel to its tourist attraction, adding **400 establishments** and more than **18,312 beds** in 2019, of which nearly 14,000 are located in the metropolitan area of Bilbao, which opened two more hotels in 2021.

Bilbao

13,248

places in 2022

Bizkaia

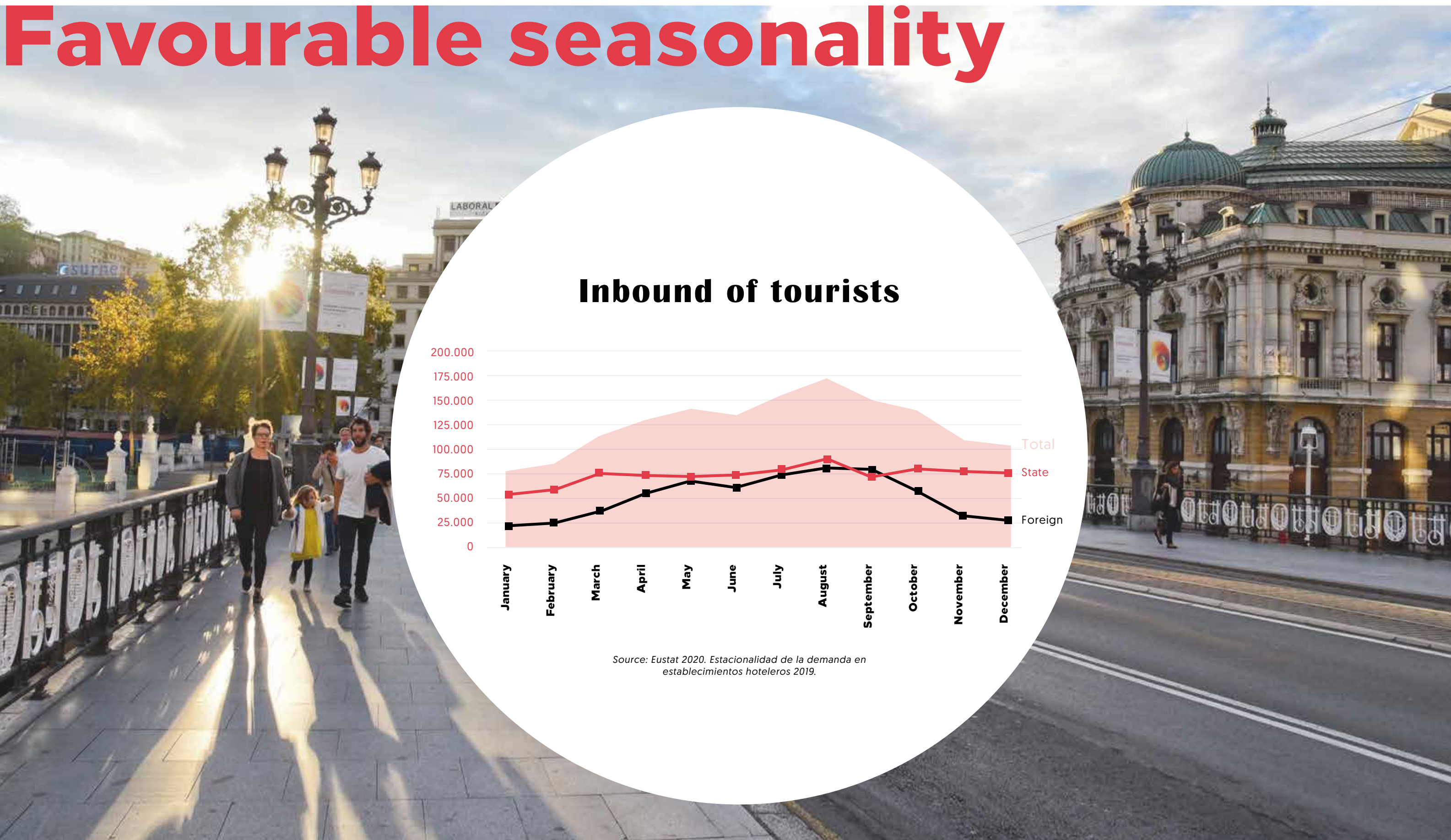
19,761

places in 2022

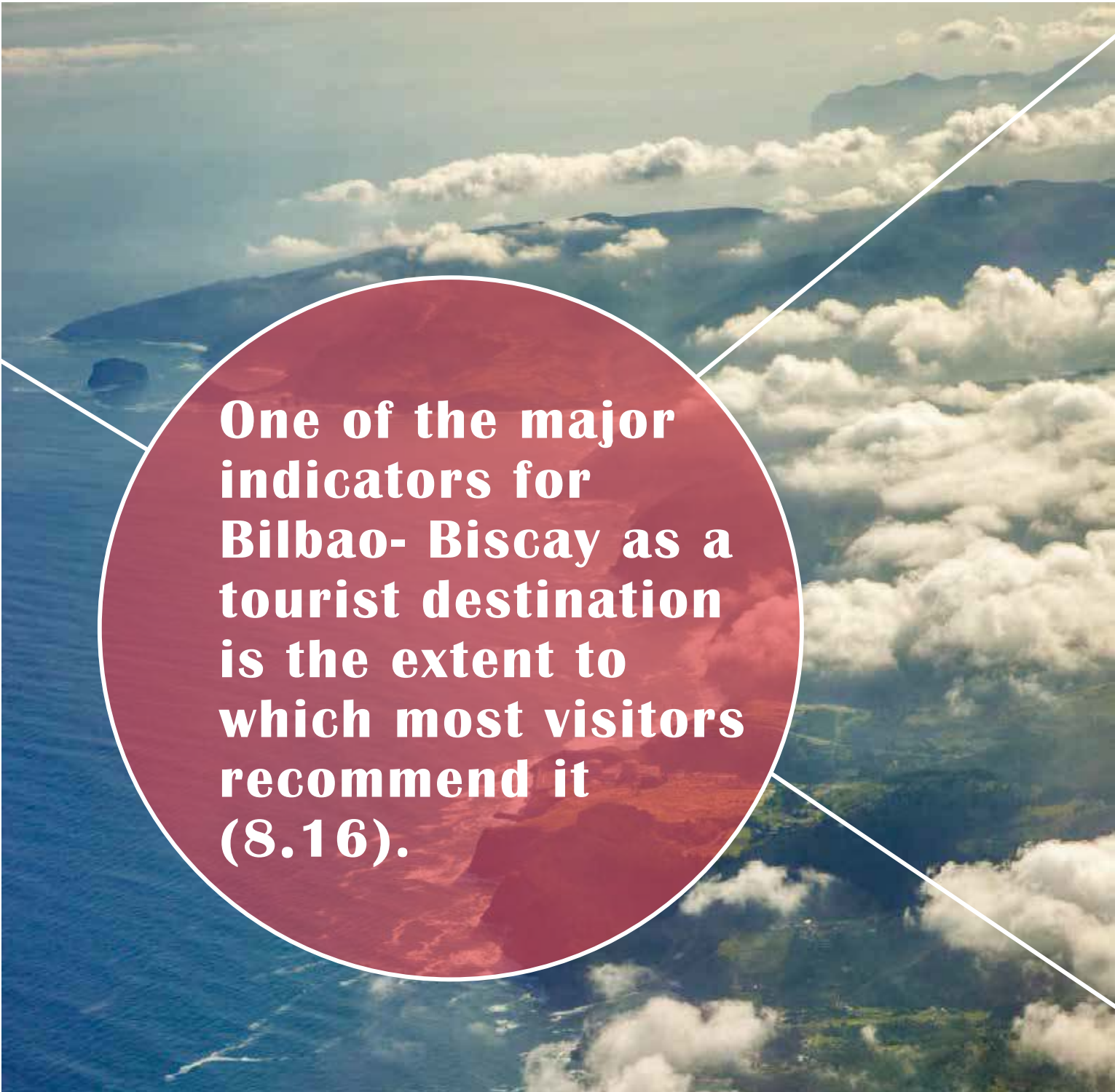
400

establishments

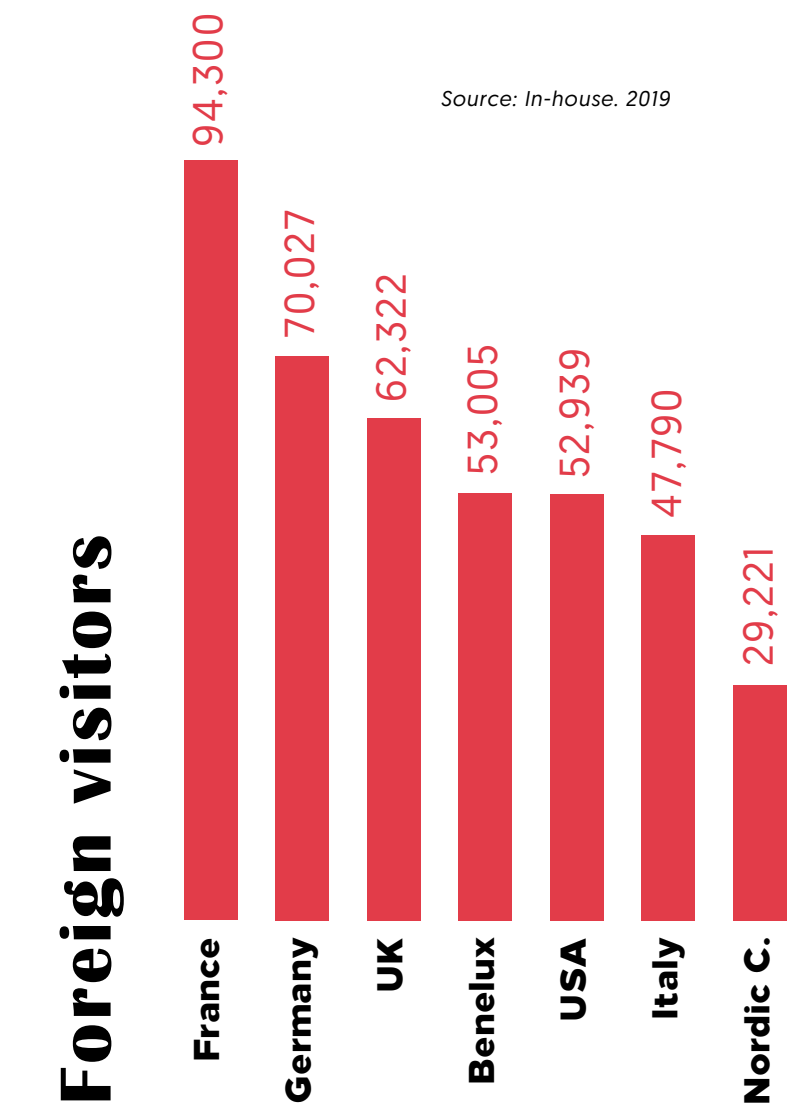
Favourable seasonality



Visitor profile in Biscay



Due to the country’s proximity, most foreigners visiting Biscay are still French, and **94,300** tourists were registered in 2019. 100% of US visitors arrive in the Basque Country by air, and the airport is also used en masse by almost 90% of German and British tourists.



€ **833**€

average spending per stay.

Up by 62.8% against 2019
Average spending by foreign visitors was substantially higher at 859.1 euros.
Source: ETR Survey by Eustat. In-house. 2019

In pursuit of natural landscapes

Armañón, Urkiola and Gorbeia are the province's three natural parks, beautiful landscapes with spectacular waterfalls, peaks rising up over 1,000 m high and unique geological formations.

A universe where you can reconnect with nature and which also offers a wealth of adventure and leisure activities.

The Urdaibai Biosphere Reserve, an exceptional natural enclave stretching over more than 22,000 ha.



Rural tourism on the rise



Biscay

53,320

2022 agritourism
inbound travellers

130,995

2022 agritourism
overnight stays

ETR (Residents Travel Survey) Data



122

rural accommodation units

1,237

places

Bizkaia Tourist Observatory

Euskadi



402

Rural houses Basque Country



32

Rural tourist apartments in the
Basque Country

Basque Government

THE AIRPORT

Block 2

Bilbao Airport

- In the midst of air traffic recovery
- Passengers using Bilbao Airport
- A great infrastructure moving forward with the sector
- A safe airport at the forefront
- New investments
- An innovating airport
- Standing by the airlines



Bilbao Airport

This is northern Spain's main airport, and the Basque Country's principal external connectivity hub. Is located only 12 kilometres from Bilbao.

Catchment area



5.129.583
passengers
in 2022

Up by 98.7% over 2019

1.811.566
international passengers
in 2022

Up by 71.1% over 2019

Best year in its history

44.919
operations
in 2022

Up by 70% over the previous year

34%
business

Source: Aena. Provisional non audited data 2019 (round trip)

Bilbao Airport

Ranked 14th in terms of passenger numbers

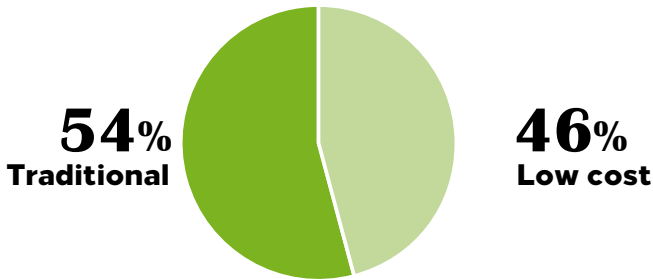
Ranked 7th, disregarding island airports

An airport with a major business traffic component (34%)

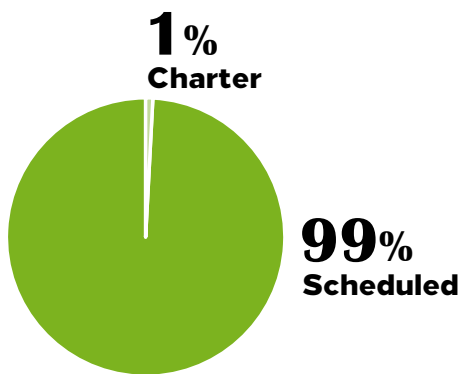


Source: Aena. Provisional non audited data 2019 (round trip)

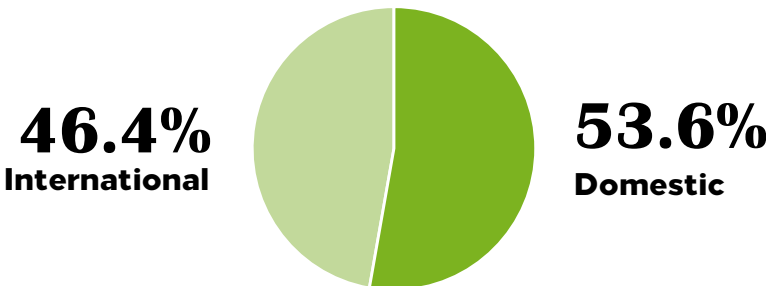
Airline



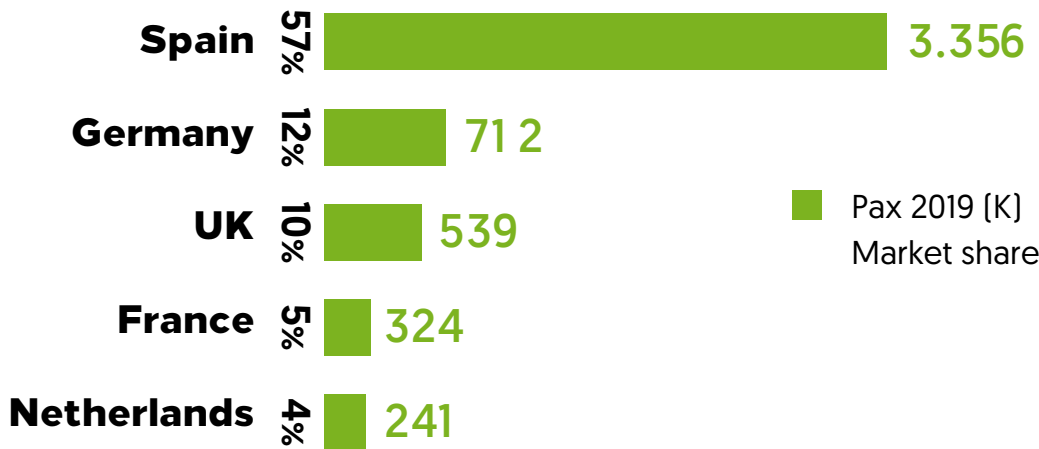
Flight



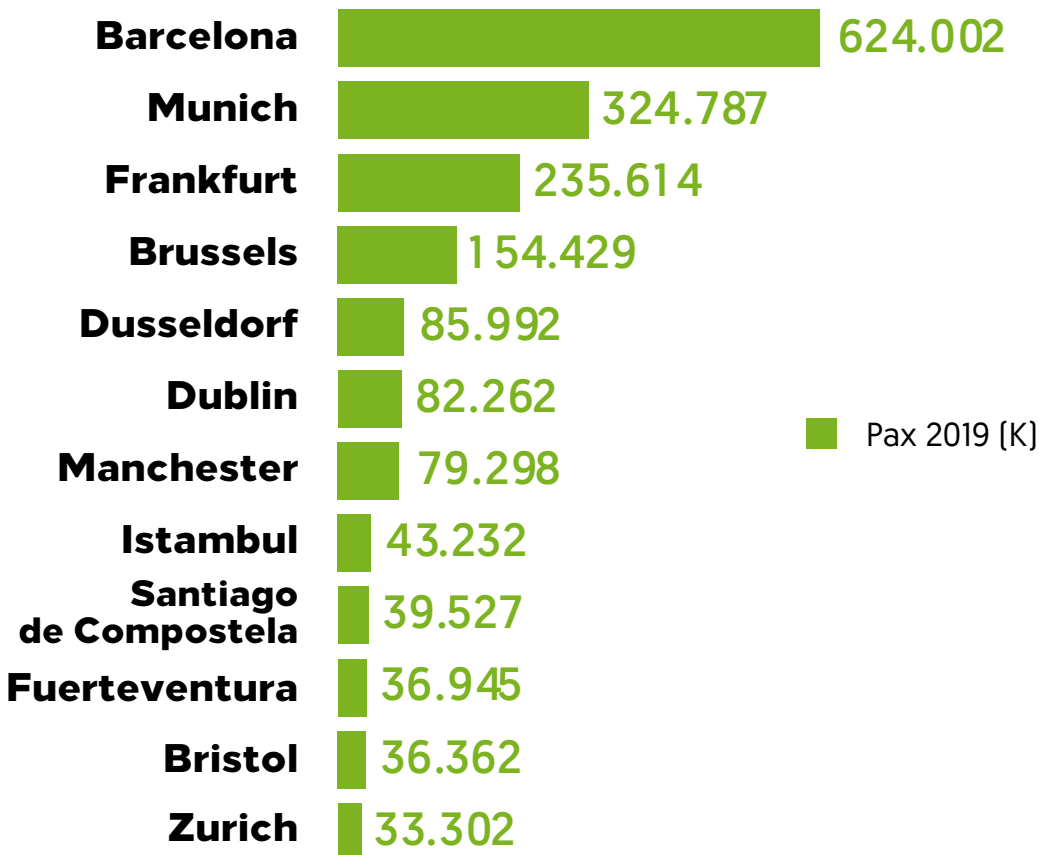
Traffic distribution



Main countries



Destinations operated only by one airline

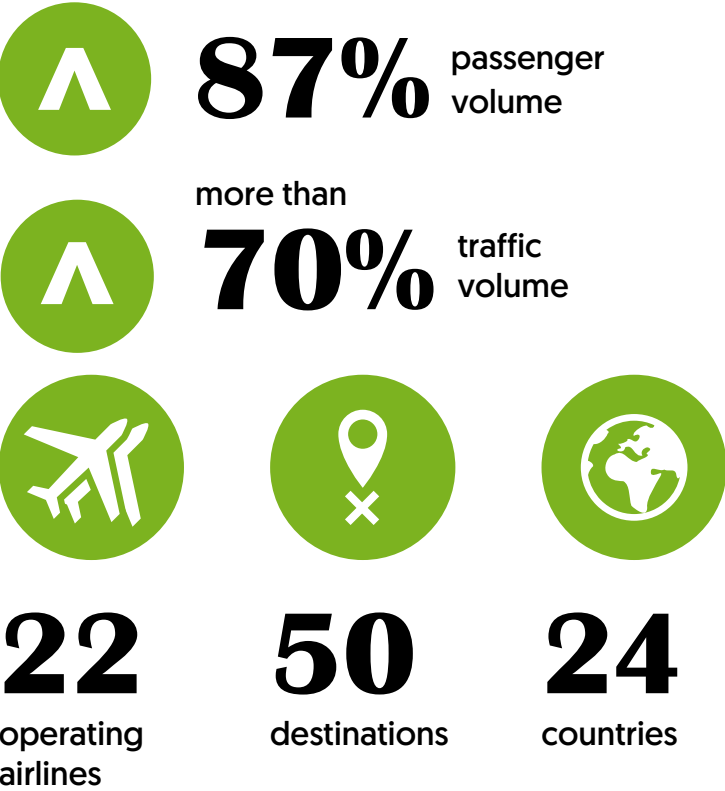


In the midst of air traffic recovery



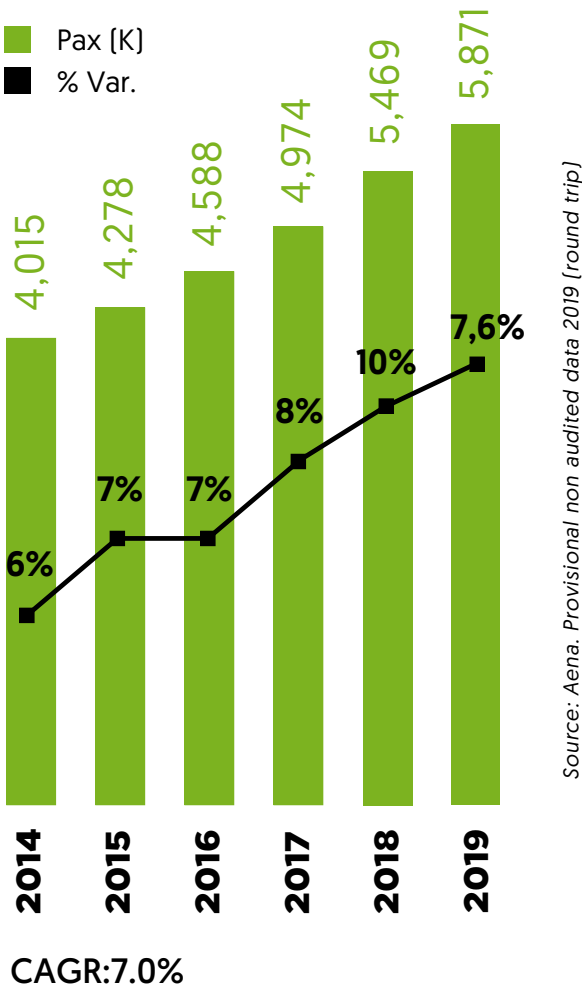
Bilbao Airport has recovered between January and December 2022 its passenger volume by 87% over 2019 and the volume of traffic by more than 70%.

Highlights 2022



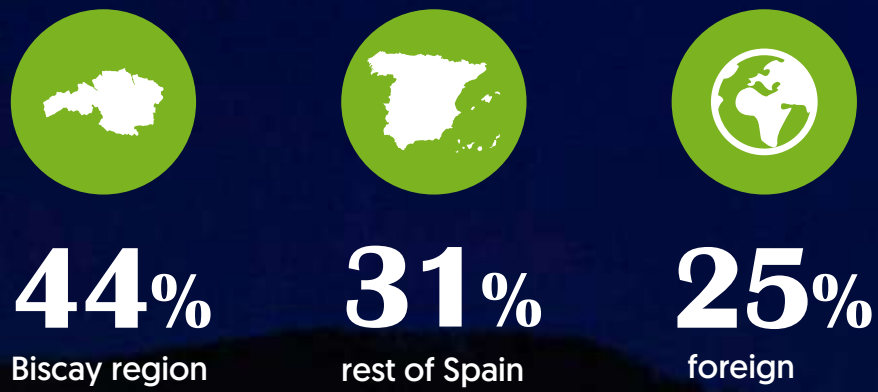
Source: Aena. INE. +5000 pax/year

Annual traffic evolution

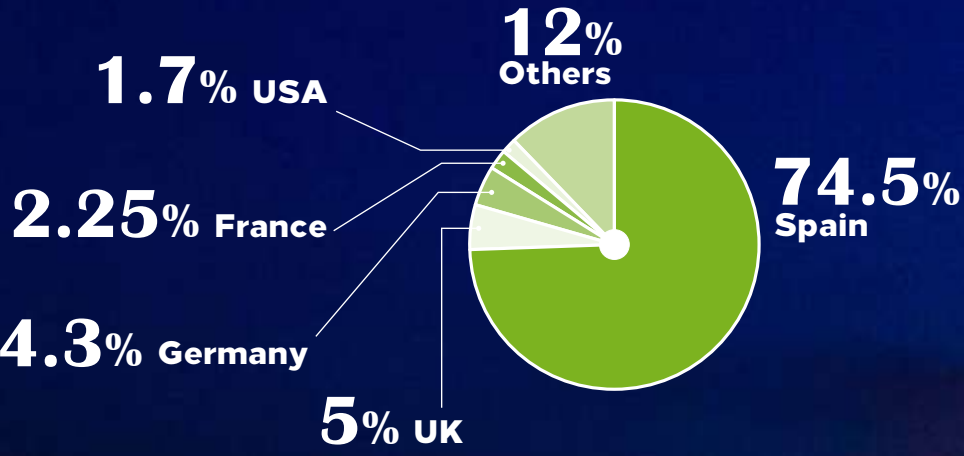


Passengers using Bilbao Airport

Residence



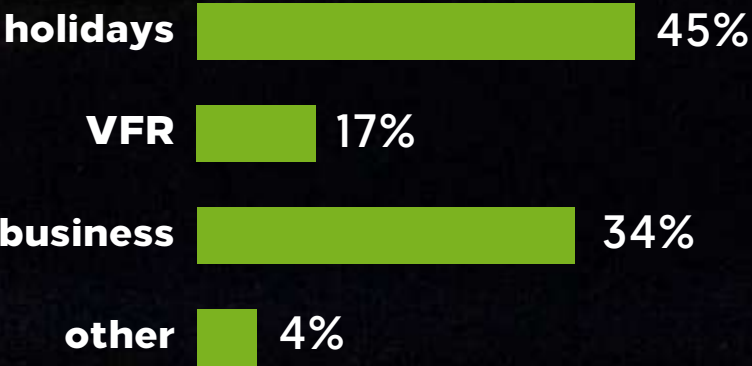
Travelers nationality



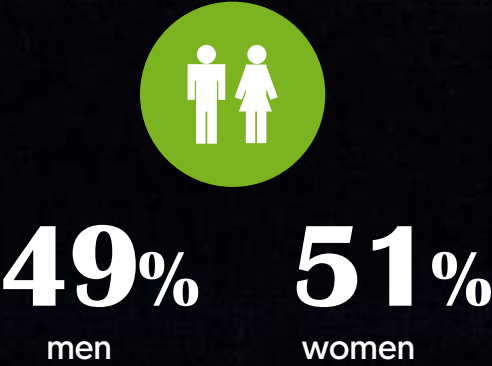
Source: Aena surveys EMMA 2019 (muestra=2.949)



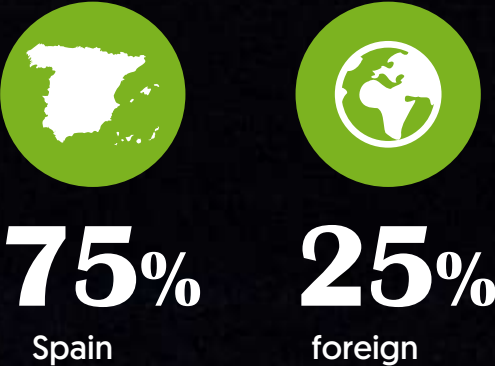
Reason for travelling



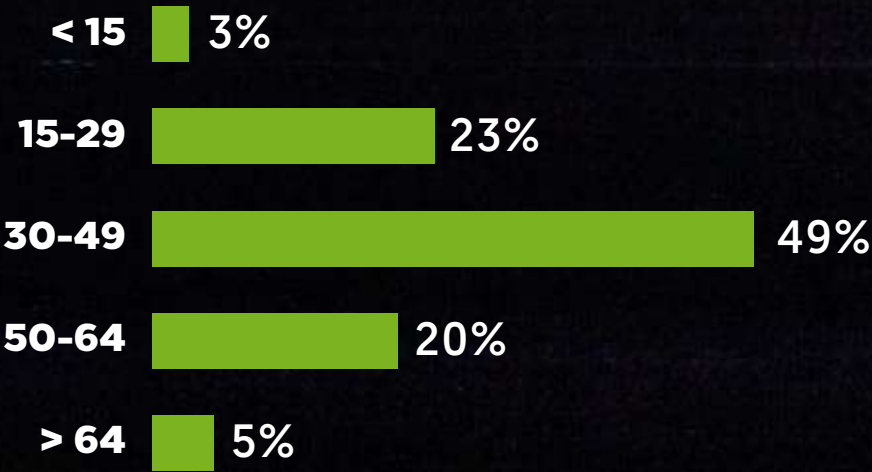
Gender



Nationality



Age



A great infrastructure moving forward with the sector

AENA is the airport's manager. It is the world's largest airport operator by passenger numbers.



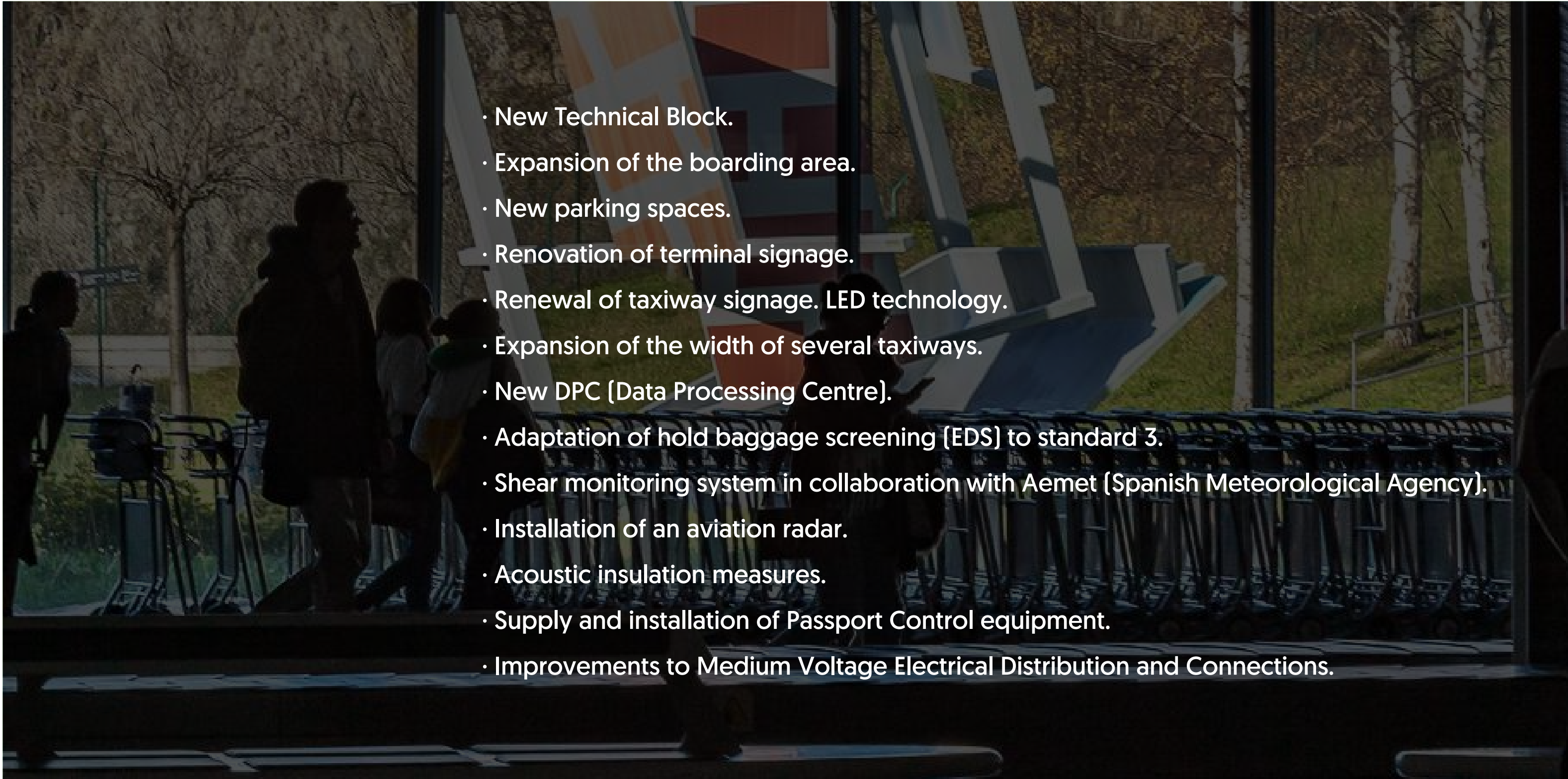
A safe airport at the forefront

Bilbao Airport, designated in 2019 the best on the European continent in the category of 5 to 10 million passengers by the Airports Council International (ACI) for the quality of the service it offers, its airport marketing proposals and its commitment to the environment.

It has been voted this year as the second best airport in Europe and ranks 24th among the world's major airports, according to the annual ranking of the air passenger rights organisation AirHelp.



New investments

- 
- New Technical Block.
 - Expansion of the boarding area.
 - New parking spaces.
 - Renovation of terminal signage.
 - Renewal of taxiway signage. LED technology.
 - Expansion of the width of several taxiways.
 - New DPC (Data Processing Centre).
 - Adaptation of hold baggage screening (EDS) to standard 3.
 - Shear monitoring system in collaboration with Aemet (Spanish Meteorological Agency).
 - Installation of an aviation radar.
 - Acoustic insulation measures.
 - Supply and installation of Passport Control equipment.
 - Improvements to Medium Voltage Electrical Distribution and Connections.

An innovating airport

**Bilbao Airport
is involved in
pilot technological
developments.**

Bilbao Airport is involved in pilot technological developments to improve passenger safety, management and experiences



Noise and Flight Path Monitoring System



Panomera camera system



Bird radar



Digital loudspeaker system



New APIS features

Standing by the airlines



New incentive policies



Promoting new routes events, anniversaries...



Customised monitors at boarding gates



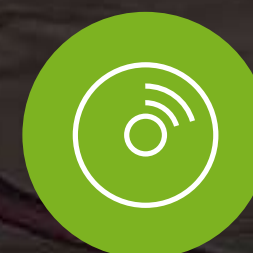
Second and third boarding pass reader



Airlines participating in weekly briefing



UCA equipment upgraded at check-in and boarding desks



Sectorised Digital Loudspeaker System

CONNECTIVITY




Block 3

Connectivity strategy

- Direct destinations from Bilbao
- Markets and new routes
- Summer Season 2022 Incentive
- Institutional backup
- Digital Marketing reference

Connectivity strategy



The connectivity strategy positions Euskadi as the main reference of this activity, as the gateway to the Bay of Biscay.

Air connectivity is essential to the city of Bilbao and the territory of Biscay to make them competitive as a tourist destination and promote economic development.

General objectives:

- **To boost the number of visitors to the Basque Country to drive tourism and the economy.**
- **To facilitate the globalisation of Basque businesses to connect them to key cities for the purposes of innovation and global economic development.**
- **To offer better connectivity so that passenger experiences bring about a better standard of living and greater demand for air transit services.**

Direct destinations from Bilbao

Bilbao Airport
Route Development Committee

- SUMMER-AUTUMN 2023
- **DESTINATIONS TO BE RECOVERED**
- NEW ROUTES TO BE ACHIEVED



Markets and new routes



At some point in the future consideration could be given to setting up connections to countries in the Americas with traditional links to Euskadi.

Winter Season 2022 Incentive



Condition

At the end of W22 [EOS ¹] the airline must have maintained the minimum programmed seats threshold in relation to HBD ¹ on each geographical zone.



Refund

Will be the result of multiplying the number of commercial departure passengers that exceed the load factor thresholds by its average passenger charge in each zone and the percentage of the refund established in each zone.



From 1st of November 2022 to 31st of March 2023

Must be requested before the end of March 2023 by sending an email to facturacion@aena.es or  [Request Incentive](#)

Note: The airline must carry at least 1,000 departure commercial passengers from November 2022 to March 2023.

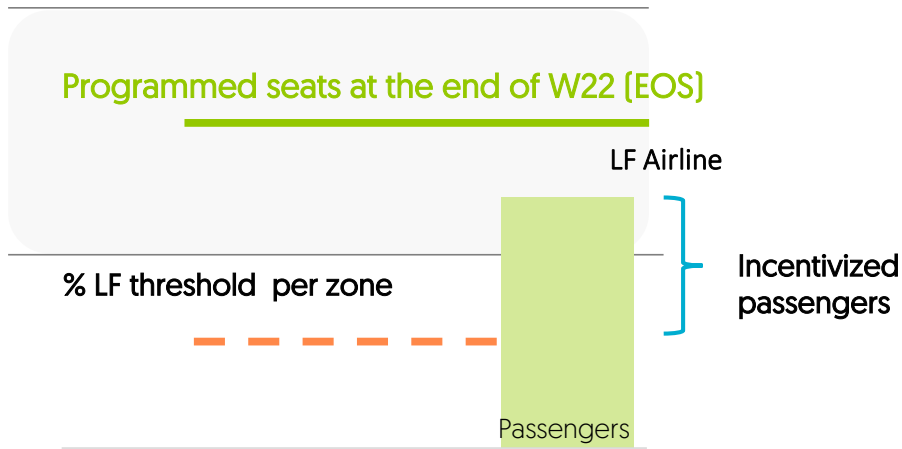
¹ EOS. End of Season [Program at 25th March 2023]. HBD. Historic Baseline Date [Program at 31st August 2022] ² Long haul corresponds to routes longer than 4,000 km and short haul < 4,000 km.

Parameters for the calculation of the refund per zone

	Zone 1 and 2 Short Haul ² & Latin America	Zone 3 Long Haul ² (Excl. Latin America)
Minimum seat threshold in relation to EOS / HBD ¹	85%	50%
Load Factor threshold	80%	70%
Passenger charge refund	50%	100%

Programmed seats at HBD

85% Programmed seats at HBD Short Haul and Latin America
50% Programmed seats at HBD Long Haul



Institutional backup



Working closely alongside the airlines, the institutions plan to arrange the following:

- 1.** Co-marketing campaigns to publicise the new routes.
- 2.** B2B events at destinations to generate business on the new routes.
- 3.** Joint communication campaigns.
- 4.** Incentive trips - famtrips and presstrips - to showcase the potential of the new routes for influencers, agencies and specialised and general communication media.
- 5.** Promotional events in Bilbao- Biscay to launch the company's own campaigns or tourism campaigns for the cities linked.
- 6.** Trade missions to boost business and institutional relations.
- 7.** Assistance with local-level management with Basque companies and institutions.
- 8.** Technical assistance in feasibility management and rollout of specific connectivity projects.
- 9.** Airlines and other connectivity players can also publicise their businesses on institutions' websites, social networks and newsletters.
- 10.** Arrangement of encounters with local press and organisation of press conferences.

Digital Marketing reference

Campaigns

"Discover your Bilbao Bizkaia side"

Reach: +11 million accounts on Facebook and nearly 9 million on Instragram
New followers: 122.555
Facebook: 39.751
Instagram: 82.804

www.visitbiscay.eus + www.bilbaoturismo.net



2,844,012
new users



3,773,671
sessions



9,435,821
page views

Datos 2018 - 2020

Cobranding

"Appetizing cities"

Promotional action in conjunction with Vueling, Visit Sevilla, Málaga Tourism, Costa del Sol, Visit Valencia and Barcelona Tourism.
Reach: +2.270.712
Clicks: +41.466 to Vueling website (sale of tickets to Bilbao)

[@visitbiscay](https://www.instagram.com/visitbiscay) + [@bilbaoturismo](https://www.instagram.com/bilbaoturismo)



120,400
Instagram followers



64,000
Facebook followers



9,622
Twitter followers

188,722
total followers

A photograph of the Bilbao Airport terminal at dusk. The terminal's distinctive, curved, metallic roof is illuminated from within, creating a bright glow against the darkening sky. The sky transitions from a deep purple at the top to a vibrant orange and red near the horizon. In the foreground, the lower levels of the terminal and some ground service equipment are visible. A large, semi-transparent blue circle is centered over the image, containing white text. Several thin, colored lines (blue, green, red, white) cross the image diagonally, intersecting the blue circle.

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