

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. September 2024

In September 2024, there were fewer visitors and overnight stays at hotel establishments in the Basque Country than the previous year

The cumulative number of overnight stays during the three summer months of 2024 was 1.1% higher than in 2023

In **September 2024**, visitor numbers at hotel establishments in the Basque Country decreased by 1.8% in year-on-year terms and overnight stays were down 0.2%, according to Eustat data. The 359,503 registered visitors gave rise to a total of 731,977 overnight stays.

Foreign tourists accounted for 55.0% of visitors and 55.1% of overnight stays, despite visitor numbers falling by 0.7% and overnight stays by 0.2%.

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

	Visitors		Overnight stays		Average stay	
	09/2024	m/m-12 (%)	09/2024	m/m-12 (%)	09/2024	09/2023
BASQUE COUNTRY	359.503	-1,8	731.977	-0,2	2,04	2,00
State origin	161.867	-3,2	328.699	-0,1	2,03	1,97
Foreign origin	197.636	-0,7	403.278	-0,2	2,04	2,03
Araba/Álava	51.668	6,4	101.929	2,1	1,97	2,05
State origin	33.273	7,3	67.265	5,0	2,02	2,07
Foreign origin	18.395	4,7	34.664	-3,0	1,88	2,03
Vitoria-Gasteiz	38.879	10,5	79.642	4,4	2,05	2,17
Bizkaia	159.115	-6,5	316.819	-3,2	1,99	1,92
State origin	69.542	-7,0	136.218	-1,3	1,96	1,84
Foreign origin	89.573	-6,1	180.601	-4,7	2,02	1,99
Bilbao	104.555	-5,1	215.337	-3,3	2,06	2,02
Gipuzkoa	148.720	0,8	313.229	2,4	2,11	2,07
State origin	59.052	-3,7	125.216	-1,4	2,12	2,07
Foreign origin	89.668	4,1	188.013	5,0	2,10	2,08
Donostia / San Sebastian	94.797	5,1	211.068	6,2	2,23	2,20

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 October 22, 2024

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 51,668 visitors and 101,929 overnight stays, 6.4% and 2.1% more than in September the previous year. In Gipuzkoa, growth reached 0.8% in the case of visitor numbers and 2.4% in that of overnight stays, with a total of 148,720 visitors and 313,229 overnight stays. In Bizkaia, 159,115 visitors were recorded in September 2024 (6.5% less than in September 2023) and there were 316,819 overnight stays (3.2% less than in the same month of the previous year).

By provincial capital, visitor numbers rose by 10.5% in Vitoria-Gasteiz and 5.1% in San Sebastián, while they fell by 5.1% in Bilbao. Likewise, the increase in overnight stays compared to the previous September reached 4.4% in Vitoria-Gasteiz and 6.2% in San Sebastián, with a decrease of 3.3% in Bilbao.

The average length of stay in hotel establishments in the Basque Country during September 2024 was 2.04 days, higher than the 2.00 days observed in the same month of the previous year. 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. September 2024

	Occupancy rates (%)					Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)		
	09/2024	p.p. *	09/2024	p.p. *	09/2024	m/m-12 (%)	09/2024	m/m-12 (%)	
BASQUE COUNTRY	66,2	-2,8	79,8	-3,1	135,05		4,0	107,78	0,2
Araba/Álava	62,0	-2,8	78,9	-2,3	92,08		-2,1	72,67	-4,9
Vitoria-Gasteiz	61,8	-2,5	82,0	-2,2	72,05		-1,8	59,07	-4,4
Bizkaia	64,3	-3,3	78,9	-3,6	119,62		4,5	94,34	0,0
Bilbao	70,5	-3,3	85,3	-4,3	135,05		3,4	115,23	-1,6
Gipuzkoa	69,8	-2,4	81,2	-2,8	166,18		4,5	134,87	1,1
Donostia / San Sebastian	77,1	-0,8	88,9	-0,7	205,26		2,7	182,47	1,9

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 October 22, 2024

Source: Eustat Tourist accommodating establishments survey

The occupancy rate for the Basque Country as a whole in September stood at 66.2% in the case of beds and 79.8% in that of rooms. In relation to September 2023, this meant a decrease of 2.8 and 3.1 percentage points, respectively.

The average daily rate (applied to a double room with a bathroom offered as room only accommodation), or ADR, was 135.1 euros in September 2024 in the Basque Country, which was a rise of 4.0% in respect of September the previous year. The ADR stood at 166.2 euros in Gipuzkoa, 119.6 euros in Bizkaia and 92.1 euros in Álava. The differences were greater by provincial capital, given that the ADR reached 205.3 euros in San Sebastián, 135.1 euros in Bilbao and, lastly, it stood at 72.1 euros in Vitoria-Gasteiz.

The RevPar, or average revenue per available room, was 107.8 euros in hotel establishments in the Basque Country in September 2024, 0.2% higher than that obtained in the same month of the previous year.

Balance for summer 2024

The room occupancy rate for the three summer months as a whole stood at 82.2%, 2 percentage points lower than in summer 2023

During the three summer months as a whole (July, August and September 2024), 1,172,545 visitors were recorded at hotel establishments in the Basque Country, resulting in a total of 2,461,084 overnight stays, which represented increases in respect of the same cumulative period of the previous year of 0.1% and 1.1%, respectively.

Entries, overnight stays, average stay and occupancy rates in hotel establishments in the Basque Country by origin. Summer(*). 2024

	Visitors		Overnight stays			Average stay		Occupancy rates (%)				
	2024	2024 / 2023 (%)	2024	2024 / 2023 (%)	2024	2024 / 2023 (%)	2024	p.p. *	by seats		by rooms	
									2024	p.p. *	2024	p.p. *
BASQUE COUNTRY	1.172.545	0,1	2.461.084	1,1	2,10	2,08	72,3	-1,9	82,2	-2,0		
Residents in the state	533.217	-2,8	1.147.791	-1,1	2,15	2,12	-	-	-	-		
Foreign residents	639.328	2,6	1.313.293	3,2	2,05	2,04	-	-	-	-		
Araba/Álava	170.414	2,8	341.596	4,5	2,00	1,97	67,8	-1,1	80,3	-1,5		
Residents in the state	103.140	1,6	223.387	5,4	2,17	2,09	-	-	-	-		
Foreign residents	67.274	4,7	118.209	2,9	1,76	1,79	-	-	-	-		
Vitoria-Gasteiz	131.072	5,8	270.612	7,3	2,06	2,04	68,9	4,6	83,7	-0,5		
Bizkaia	521.641	-3,3	1.064.719	-1,8	2,04	2,01	69,9	-2,2	80,6	-2,1		
Residents in the state	236.176	-6,4	492.409	-3,8	2,08	2,03	-	-	-	-		
Foreign residents	285.465	-0,5	572.310	-0,1	2,00	2,00	-	-	-	-		
Bilbao	344.255	-3,2	705.403	-2,5	2,05	2,03	81,7	-3,1	88,1	-3,2		
Gipuzkoa	480.490	2,9	1.054.769	3,2	2,20	2,19	76,5	-1,8	84,6	-2,0		
Residents in the state	193.901	-0,5	431.995	-1,2	2,23	2,24	-	-	-	-		
Foreign residents	286.589	5,4	622.774	6,4	2,17	2,15	-	-	-	-		
Donostia / San Sebastian	298.164	5,7	698.319	7,5	2,34	2,30	86,8	9,0	92,5	2,9		

(*)Months of July, August and September

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

Date October 22, 2024

Source: Eustat Tourist accommodating establishments survey

Visitors from abroad increased by 2.6% compared to summer 2023 and overnight stays rose by 3.2%.

Álava accumulated 341,596 overnight stays during these three months, 4.5% more than during the previous summer. Gipuzkoa registered a total of 1,054,769 overnight stays, following a year-on-year increase of 3.2%. Bizkaia, on the other hand, with a total of 1,064,719 over the three-month period, saw the number of overnight stays fall by 1.8% compared to summer of the previous year.

The average length of stay calculated for summer 2024 reached 2.10 days, slightly above the 2.08 days observed during the previous summer.

The occupancy rate in hotel establishments in the Basque Country as a whole reached 72.3% in the case of beds and 82.2% in the case of rooms, which meant a decrease of 1.9 and 2.0 percentage points respectively.

By province, Gipuzkoa stood out with a bed occupancy rate of 76.5%, followed by Bizkaia with 69.9% and, finally, Álava with 67.8%. In the case of rooms, all three provinces had an occupancy rate in excess of 80.0%: 84.6% in Gipuzkoa, 80.6% in Bizkaia and 80.3% in Álava.

By provincial capital, San Sebastián saw the highest occupancy rates: 86.8% for beds and 92.5% for rooms. In Bilbao, the occupancy rates were 81.7% in the case of beds and 88.1% in that of rooms, and, lastly, in Vitoria-Gasteiz, these stood at 68.9% and 83.7%, respectively.

Note:

The response rate for the ETR for Hotels in September 2024 was **93.6%**. 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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