

The Hospitality sector in the Basque Country records the best result in the historical series in 2023, after a growth of 19.2%

The sub-sector of Hotels and Other accommodation saw the most growth in terms of turnover (10.5%), employment (4.5%) and number of establishments (4.3%)

The *Hospitality* sector in the Basque Country, which encompasses companies that offer accommodation services as well as those offering food and drink, finished the year 2023 with an improvement in its year-end profits, which grew by 19.2%, amounting to 347 million, according to Eustat data. This is the best result of the available historical series, valued at current prices.

It also experienced growth in both turnover, calculated at 6.4%, and gross value added at factor cost (which represents the wealth generated and is equivalent to gross output minus intermediate consumption after adjustment for subsidies and indirect taxes), which rose by 7.4%, reaching 1,848 million.

The Basque *Hospitality* sector employed 62,190 people in 13,460 establishments, amounting to a drop of 0.3% in the number of people working and an increase of 0.3% in the number of establishments, compared to the figures from the previous year. In absolute values, this represents a small decrease of 216 jobs, although the number of establishments grew slightly, 13,460 versus 13,420.

Self-employed workers made up 7.7% of the total turnover in the sector, just over three points less than 10 years previously

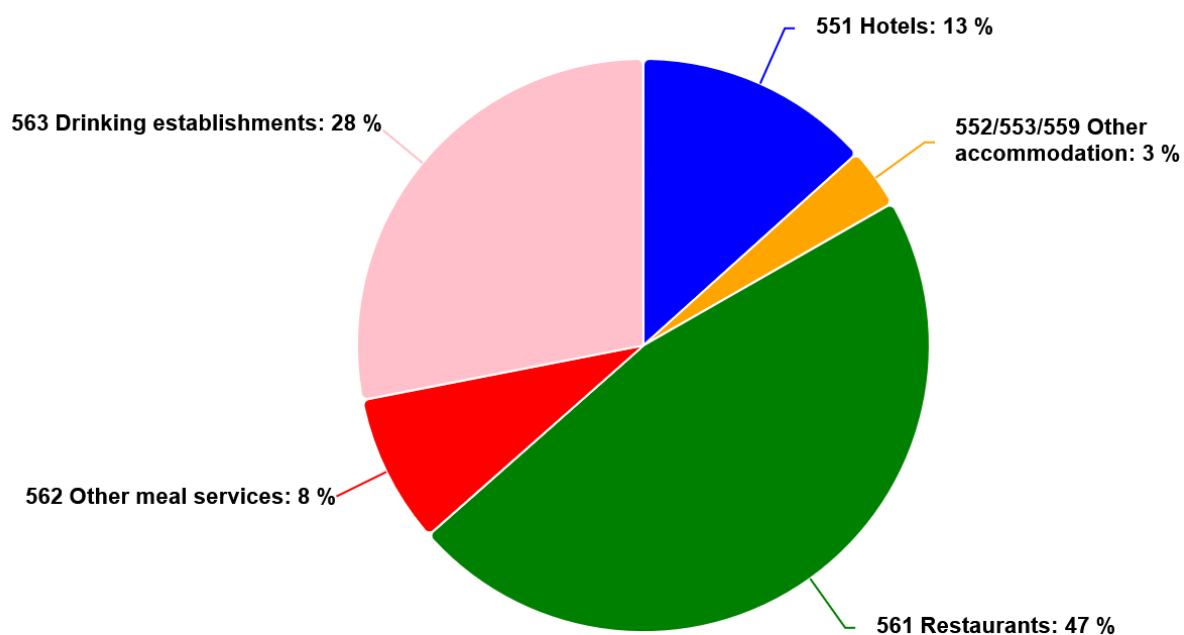
Establishments run by self-employed workers without salaried employees accounted for 7.7% of the turnover figure in the hospitality sector in 2023. This amount decreased by slightly over three percentage points compared with 2013 (11%) and was very variable depending on the various sub-activities it comprises.

Thus, *Drinks Establishments* in which only their owners work made up 44% of the *Drinks Establishments* in the whole of the Basque Country, and they accounted for 20.2% of the total, in which 20% of the total number of people working in this type of establishment were self-employed.

As regards *Restaurants and Food Stalls*, just over one in ten establishments (13%) was exclusively run by self-employed personnel, which, as a whole, represented 2.6% of the employment for this type of establishment, and made up 2.5% of the turnover for their sector.

Distribution of the turnover of the Hospitality sector of the Basque Country by activity groups. 2023

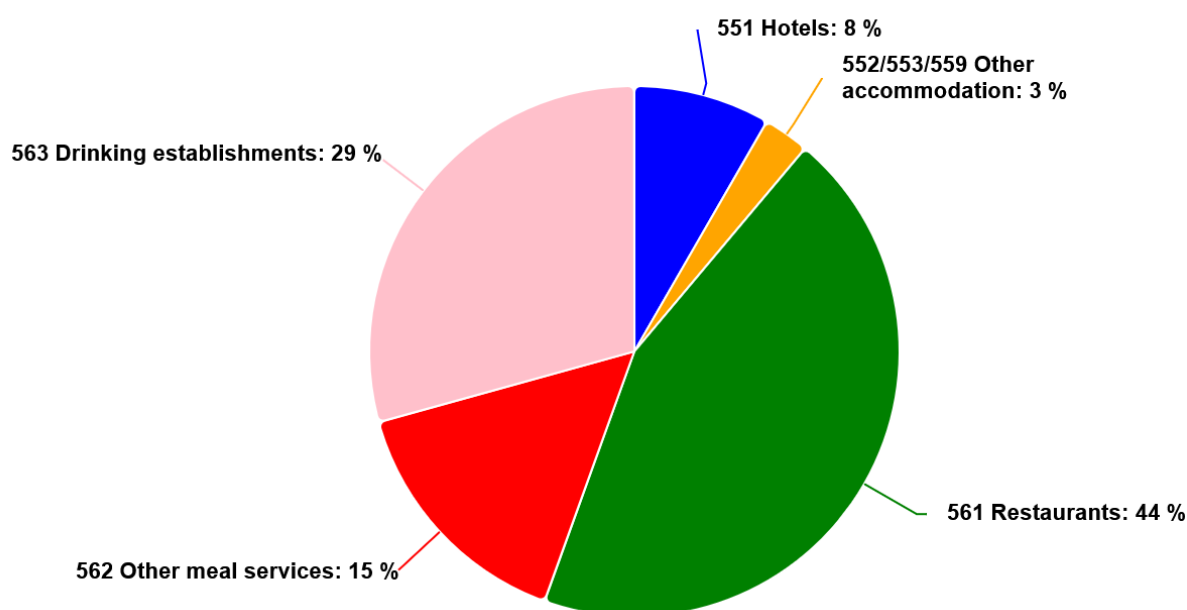
percentage



Source: Eustat. Services survey

Distribution of the employed staff of the Hospitality sector of the Basque Country by activity groups. 2023

percentage



Source: Eustat. Services survey

Within *Hospitality*, the *Food & Drink* division, which in turn includes the sub-sectors of *Restaurants*, *Other Food Services* and *Drinks Establishments*, was dominant. It accounted for 89.1% of establishments, 88.9% of employment and 83.3% of turnover.

Its turnover reached 3,536 million euros, an increase of 5.6% compared to the figure for the previous year. On the other hand, employment shrank by 0.9%, losing 511 jobs, with a total of 55,266 people working in this division. Some establishments were also lost, 20 specifically.

2023, an outstanding year for Restaurants and Food Stalls

The *Food & Drink* division also managed to finish the year with a positive year-end result: the 281 million euros constitute the highest in the known historical series, in terms of nominal prices.

An analysis of the results at a more disaggregated level of activity reveals that *Restaurants and Food Stalls*, the most significant sub-sector, saw a positive variation of 8.9% in turnover, also increasing employment (+4.5%) and the number of establishments (+3.2%).

The year 2023 can be considered as an outstanding year for the sub-sector of *Restaurants and Food Stalls*, since it hit highs both in the number of establishments (4,422) as well as employment (27,594), sales (1,986 million euros), year-end profits (120 millions) and added value (836 million).

In turn, the sub-sector of *Drinks Establishments* increased its turnover by 3.6% compared to the previous year, although it saw a decrease in both the number of people employed (-2.5%), and the number of establishments (-2.2%).

As for the *Other Food Services* sub-sector, catering, among others saw a decrease in turnover (-4.6%). The number of people employed also fell (-11.5%) and only the number of establishments grew (3.2%).

More notable was the increase in the *Accommodation Services* division, made up of the sub-sectors of *Hotels and Other Accommodation*. Its employment and supply grew, with an increase of 295 people and 60 establishments, putting the figures for 2023 at 6,924 people employed (4.5% more) and 1,465 establishments (4.3% more). Its turnover exceeded 711 million euros, which is 10.5% higher turnover than the previous financial year.

Main variables of Hospitality sector of the Basque Country by activity group (thousands of euros). 2023

	Establishments		Personnel employed		Turnover		Profit for the year	
	Value	Annual variation 2023-2022 (%)	Value	Annual variation 2023-2022 (%)	Value	Annual variation 2023-2022 (%)	Value	Annual variation 2023-2022 (%)
HOSTELRY	13.460	0,3	62.190	-0,3	4.246.766	6,4	347.423	19,2
Accommodation services	1.465	4,3	6.924	4,5	710.802	10,5	66.789	23,3
Hotels and similar accommodation	662	2,5	5.183	5,6	567.233	11,8	48.651	16,8
Other accommodation	803	5,8	1.741	1,2	143.569	6,0	18.138	44,9
Food and beverage services	11.995	-0,2	55.266	-0,9	3.535.964	5,6	280.634	18,3
Restaurants and food stalls	4.422	3,2	27.594	4,5	1.986.083	8,9	120.205	25,8
Other meal services	293	3,2	9.461	-11,5	359.025	-4,6	6.108	-17,0
Drinking establishments	7.280	-2,2	18.211	-2,5	1.190.856	3,6	154.321	15,0

Date March 19, 2025

Source: Eustat. Services survey

Positive trend in economic indicators in the three provinces

All three provinces performed positively compared with the figures for the previous year. Comparatively, hospitality turnover rose by 5.7% in Gipuzkoa, 6.3% in Álava and 6.9% in Bizkaia. The number of establishments changed less, growing by 0.8% and 0.1% in Bizkaia and Gipuzkoa respectively, but falling in Álava, by -1.2%. Employment grew in Bizkaia by 0.8%, but fell by 1.3% in Álava and was down 1.5% in Gipuzkoa.

Main variables of Hospitality sector of the Basque Country by province (thousands of euros). 2023

	Basque Country	Annual variation 2023-2022 (%)	Araba/Álava	Annual variation 2023-2022 (%)	Bizkaia	Annual variation 2023-2022 (%)	Gipuzkoa	Annual variation 2023-2022 (%)
NU establishments	13.460	0,3	1.920	-1,2	7.091	0,8	4.449	0,1
Personnel employed NU	62.190	-0,3	8.806	-1,3	30.809	0,8	22.575	-1,5
Turnover	4.246.766	6,4	557.912	6,3	2.051.524	6,9	1.637.330	5,7

Date March 19, 2025

Source: Eustat. Services survey

For further information:

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