

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. JULY 2025

In July 2025, overnight stays at hotel establishments in the Basque Country increased by 2.3% and visitor numbers were up 1.5%

The room occupancy rate stood at 81.6%, and the ADR or Average Daily Rate reached 144.5 euros, 4.4% more than the previous year.

In **July 2025**, visitor numbers in hotel establishments in the Basque Country were up 1.5% and overnight stays increased by 2.3% compared to July 2024, according to Eustat data. The 392,794 registered visitors gave rise to a total of 837,143 overnight stays.

Foreign tourists accounted for 57.0% of visitors and 57.2% of overnight stays, following rises of 4.5% in the case of visitors and 6.2% in that of overnight stays. In turn, the number of visitors and overnight stays from the rest of Spain decreased in year-on-year terms by 2.2% and 2.5%, respectively.

Visitors, overnight stays and average stay in hotel establishments in the Basque Country. July 2025

| | Visitors | | Overnight stays | | Average stay | |
|--------------------------|----------------|-------------|-----------------|-------------|--------------|-------------|
| | 07/2025 | m/m-12 (%) | 07/2025 | m/m-12 (%) | 07/2025 | 07/2024 |
| BASQUE COUNTRY | 392,794 | 1.5 | 837,143 | 2.3 | 2.13 | 2.11 |
| State origin | 168,896 | -2.2 | 358,580 | -2.5 | 2.12 | 2.13 |
| Foreign origin | 223,898 | 4.5 | 478,563 | 6.2 | 2.14 | 2.10 |
| Araba/Álava | 50,634 | -8.6 | 110,164 | -2.1 | 2.18 | 2.03 |
| State origin | 28,410 | -10.4 | 63,954 | -7.5 | 2.25 | 2.18 |
| Foreign origin | 22,224 | -6.2 | 46,210 | 6.5 | 2.08 | 1.83 |
| Vitoria-Gasteiz | 37,750 | -11.9 | 86,890 | -3.7 | 2.30 | 2.11 |
| Bizkaia | 182,820 | 5.2 | 360,833 | 3.2 | 1.97 | 2.01 |
| State origin | 81,371 | 1.9 | 162,364 | -0.4 | 2.00 | 2.04 |
| Foreign origin | 101,449 | 8.1 | 198,469 | 6.5 | 1.96 | 1.99 |
| Bilbao | 122,987 | 7.7 | 242,100 | 5.5 | 1.97 | 2.01 |
| Gipuzkoa | 159,340 | 0.9 | 366,146 | 2.8 | 2.30 | 2.26 |
| State origin | 59,115 | -3.4 | 132,262 | -2.3 | 2.24 | 2.21 |
| Foreign origin | 100,225 | 3.7 | 233,884 | 6.0 | 2.33 | 2.28 |
| Donostia / San Sebastian | 96,724 | -1.6 | 237,873 | 0.1 | 2.46 | 2.42 |

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 August 21, 2025

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 50,634 visitors and 110,164 overnight stays, representing decreases of 8.6% and 2.1%, respectively, compared to the previous year. In Bizkaia, growth reached 5.2% in the case of visitors and 3.2% in that of overnight stays, with a total of 182,820 visitors and 360,833 overnight stays. In Gipuzkoa, 159,340 visitors were recorded in July 2025 (0.9% more than in July 2024) and there were 336,146 overnight stays (2.8% more than in the same month of the previous year).

By provincial capital, visitor numbers increased in respect of the previous July by 7.7% in Bilbao, 1.6% in San Sebastián and 11.9% in Vitoria-Gasteiz. Regarding the number of overnight stays, in Vitoria-Gasteiz they fell by 3.7%, meanwhile in Bilbao they rose by 5.5%, and in San Sebastián by 0.1%.

The average length of stay¹ in hotel establishments in the Basque Country during July 2025 was 2.13 days, slightly higher than the 2.11 days observed in the same month of the previous year.

Bed occupancy rates and profitability in hotel establishments in the Basque Country. July 2025

| | Occupancy rates (%) | | | | Profitability | | | |
|--------------------------|---------------------|-------------|-------------|------------|---------------|-------------|----------------|-------------|
| | by seats | | by rooms | | ADR (euros) | | RevPAR (euros) | |
| | 07/2025 | p.p. * | 07/2025 | p.p. * | 07/2025 | m/m-12 (%) | 07/2025 | m/m-12 (%) |
| BASQUE COUNTRY | 71.5 | -0.1 | 81.6 | 0.9 | 144.53 | 4.4 | 117.91 | 5.6 |
| Araba/Álava | 65.0 | -1.6 | 81.3 | 3.3 | 100.13 | 10.8 | 81.42 | 15.4 |
| Vitoria-Gasteiz | 65.7 | -3.2 | 85.7 | 2.0 | 88.19 | 13.8 | 75.59 | 16.5 |
| Bizkaia | 68.5 | 0.2 | 78.4 | 0.1 | 118.35 | 0.7 | 92.78 | 0.8 |
| Bilbao | 73.2 | 0.2 | 82.7 | 0.3 | 127.90 | -0.5 | 105.75 | -0.1 |
| Gipuzkoa | 77.1 | 0.0 | 85.3 | 0.9 | 185.99 | 6.0 | 158.56 | 7.1 |
| Donostia / San Sebastian | 83.2 | 0.2 | 90.0 | -0.4 | 230.69 | 8.7 | 207.66 | 8.2 |

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 August 21, 2025

Source: Eustat Tourist accommodating establishments survey

The occupancy rate in July 2025 for the Basque Country as a whole was 71.5% in the case of beds and 81.6% in that of rooms. Compared to July 2024, this was a decrease of 0.1 percentage points in the case of beds and an increase of 0.9 percentage points in that of rooms.

Profitability, measured using the ADR or average daily rate (applied to a double room with a bathroom offered as room only accommodation), was 144.5 euros in July 2025 in the Basque Country, which was a rise of 4.4% in respect of July 2024. In the case of Gipuzkoa, the ADR reached 186.0 euros, in Bizkaia it was 118.4 euros and in Alava it stood at 100.1 euros. By provincial capital, the differences were greater, given that the ADR was 230.7 euros in San Sebastián, 127.9 euros in Bilbao and, lastly, 88.2 euros in Vitoria-Gasteiz.

The RevPar, or average revenue per available room in hotel establishments in the Basque Country in July 2025 was 117.9 euros, 5.6% higher than that obtained in the same month of the previous year.

¹ 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.

Annual cumulative total

In the cumulative period for the year to date (**January-July 2025**), compared to the same cumulative period of the previous year, visitor numbers rose by 4.0%, and overnight stays were up 4.8%. The average length of stay during these seven months was 1.96 days in 2025, compared to the 1.95 days observed in the same cumulative period of the previous year.

The occupancy rate during the first seven months of the year stood at 56.7% in the case of beds and 68.1% in that of rooms, 0.8 and 0.9 percentage points more than in the same cumulative period of the previous year.

Note:

The response rate of the ETR for Hotels in July 2025 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:

Eustat - Euskal Estatistika Erakundea/Basque Statistics Institute
C/ Donostia-San Sebastián, 1 01010 Vitoria-Gasteiz
Press Service: servicioprensa@eustat.eus Tel.: 945 01 75 62