

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. August 2025

In August 2025 visitor numbers increased by 1.5% and overnight stays were up 1.2% in hotels in the Basque Country

The room occupancy rate reached 86.0% and prices increased by 7.3% in August 2025

In **August 2025**, visitor numbers at hotel establishments in the Basque Country rose by 1.5% and overnight stays by 1.2% in year-on-year terms, according to Eustat data. The 432,427 recorded visitors gave rise to a total of 921,868 overnight stays.

Foreign tourists accounted for 55.2% of visitors and 53.1% of overnight stays, following rises of 4.9% in the case of visitors and 6.6% in that of overnight stays.

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

	Visitors		Overnight stays		Average stay	
	08/2025	m/m-12 (%)	08/2025	m/m-12 (%)	08/2025	08/2024
BASQUE COUNTRY	432,427	1.5	921,868	1.2	2.13	2.14
State origin	193,807	-2.4	431,921	-4.3	2.23	2.27
Foreign origin	238,620	4.9	489,947	6.6	2.05	2.02
Araba/Álava	58,916	-7.0	118,004	-7.2	2.00	2.01
State origin	36,089	-5.4	79,026	-9.1	2.19	2.28
Foreign origin	22,827	-9.4	38,978	-3.0	1.71	1.60
Vitoria-Gasteiz	44,615	-9.6	91,581	-9.1	2.05	2.04
Bizkaia	197,593	4.7	415,902	4.4	2.10	2.11
State origin	87,787	1.2	190,055	-1.6	2.16	2.23
Foreign origin	109,806	7.6	225,847	10.0	2.06	2.01
Bilbao	130,684	4.1	274,001	5.1	2.10	2.08
Gipuzkoa	175,918	1.2	387,962	0.6	2.21	2.22
State origin	69,931	-5.0	162,840	-5.0	2.33	2.33
Foreign origin	105,987	5.7	225,122	5.1	2.12	2.14
Donostia / San Sebastián	102,702	-2.3	242,187	-3.0	2.36	2.38

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 September 22, 2025

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 58,916 visitors and 118,004 overnight stays, down 7.0% and 7.2%, respectively, on August of the previous year. Bizkaia, however, recorded 4.7% more visitors and 4.4% more overnight stays than the previous year, standing at 197,593 visitors and 415,902 overnight stays in August 2025. In turn, Gipuzkoa also experienced growth, of 1.2% in the case of visitor numbers, with a total of 175,918 visitors, and 0.6% in that of overnight stays, with 387,962.

By provincial capitals, visitor numbers fell by 9.6% in Vitoria-Gasteiz and 2.3% in San Sebastián. In Bilbao, visitor numbers were up 4.1%. Likewise, the decrease in overnight stays compared to August of the previous year reached 9.1% in Vitoria-Gasteiz and 3.0% in San Sebastián. Bilbao, however, recorded 5.1% more overnight stays.

The average length of stay in hotel establishments in the Basque Country during August 2025 was 2.13 days, similar the 2.14 days observed in the same month of the previous year.¹

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

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	08/2025	p.p. *	08/2025	p.p. *	08/2025	m/m-12 (%)	08/2025	m/m-12 (%)
BASQUE COUNTRY	78.5	-0.2	86.0	0.2	154.37	7.3	132.74	7.5
Araba/Álava	69.2	-5.5	84.1	0.3	106.20	8.9	89.35	9.4
Vitoria-Gasteiz	68.8	-6.8	87.4	0.7	96.93	9.9	84.76	10.9
Bizkaia	79.0	2.1	85.2	0.8	132.44	4.3	112.84	5.3
Bilbao	82.4	0.7	87.3	-0.8	144.58	4.8	126.24	3.8
Gipuzkoa	81.4	-1.0	87.5	-0.6	193.99	9.6	169.75	8.8
Donostia / San Sebastian	84.8	-2.1	90.4	-2.2	238.10	11.8	215.13	9.2

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 September 22, 2025

Source: Eustat Tourist accommodating establishments survey

The bed occupancy rate in the Basque Country as a whole in August stood at 78.5%, down 0.2 percentage points compared to August 2024. The room occupancy rate reached 86.0%, 0.2 percentage points above that obtained in August of the previous year.

The average daily rate (applied to a double room with a bathroom offered as room only accommodation), or ADR was 154.4 euros in August 2025 in the Basque Country, which was a rise of 7.3% in respect of August the previous year. The ADR stood at 194.0 euros in Gipuzkoa, 132.4 euros in Bizkaia and 106.2 euros in Álava. The differences were greater by provincial capital, given that the ADR reached 238.1 euros in San Sebastián, 144.6 euros in Bilbao and, lastly, 96.9 euros in Vitoria-Gasteiz.

The RevPar, or average revenue per available room, was 132.7 euros in hotel establishments in the Basque Country in August 2025, 7.5% higher than that obtained in the same month of the previous year.

In August, all three provincial capitals of the Basque Country celebrated their patron saint festivities or *Semana Grande* (Big Week) festivals. During the **Virgen Blanca festival** (4 to 9 August), there were 8,605 visitors and 18,964 overnight stays in hotel establishments in Vitoria-Gasteiz, 6.3% and 6.7% lower than those recorded during the same period of the previous year. This year, occupancy rates in this type of establishment reached 73.2% in the case of beds and 93.4% in that of rooms during the festivities.

San Sebastián's Semana Grande was celebrated from 9 to 16 August in 2025. During this period, a total of 26,674 visitors and 64,655 overnight stays were recorded. Compared to the previous year's *Semana Grande*, there was decrease in both visitor numbers (2.1%) and overnight stays (1.6%). The occupancy rate was 87.7% in the case of beds and 93.1% in the case of rooms.

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..

Lastly, **Bilbao's Aste Nagusia** (Big Week) celebrations took place between 16 and 24 August 2025, during which the number of visitors to hotel establishments was 37,746 and overnight stays 80,443. Both figures are higher than those observed the previous year: 4.7% in the case of visitor numbers and 6.0% in that of overnight stays. The bed occupancy rate was 83.6% and the room occupancy rate reached 88.5%.

Annual cumulative total

In the cumulative period in the year to date (**January- August 2025**), compared to the same cumulative period of the previous year, visitor numbers rose by 3.6%, and overnight stays were up 4.8%. The average length of stay during these seven months was 1.99 days in 2025, very similar to the 1.98 days observed in the same cumulative period of the previous year.

The occupancy rate during the first eight months of the year stood at 59.6% in the case of beds and 70.5% in that of rooms, 0.9 and 1.2 percentage points higher, respectively, than in the same cumulative period of the previous year.

Note:

The response rate for the ETR for Hotels in August 2025 was **94.2%**. 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