

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. November 2025

In November 2025, visitor numbers at hotel establishments in the Basque Country increased by 1.6% in year-on-year terms.

The room occupancy rate in hotels reached 49.3% and the ADR (Average Daily Rate) remained at 97.83€

In **November 2025**, visitor numbers at hotel establishments in the Basque Country increased by 1.6% in year-on-year terms and overnight stays were up 0.3%, according to Eustat data. The 279,140 recorded visitors gave rise to a total of 541,502 overnight stays.

Foreign tourists accounted for 36.5% of visitors and 39.5% of overnight stays, following year-on-year increase of 5.3% in visitors and 8.1% in that of overnight stays.

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

| | Visitors | | Overnight stays | | Average stay | |
|--------------------------|----------------|-------------|-----------------|-------------|--------------|-------------|
| | 11/2025 | m/m-12 (%) | 11/2025 | m/m-12 (%) | 11/2025 | 11/2024 |
| BASQUE COUNTRY | 279,140 | 1.6 | 541,502 | 0.3 | 1.94 | 1.96 |
| State origin | 177,243 | -0.4 | 327,447 | -4.1 | 1.85 | 1.92 |
| Foreign origin | 101,897 | 5.3 | 214,055 | 8.1 | 2.10 | 2.05 |
| Araba/Álava | 38,799 | 2.7 | 84,830 | 4.2 | 2.19 | 2.15 |
| State origin | 30,316 | 2.7 | 60,892 | -1.9 | 2.01 | 2.10 |
| Foreign origin | 8,483 | 2.8 | 23,938 | 24.0 | 2.82 | 2.34 |
| Vitoria-Gasteiz | 29,598 | 2.9 | 68,743 | 4.2 | 2.32 | 2.30 |
| Bizkaia | 129,512 | 4.8 | 243,780 | 3.5 | 1.88 | 1.91 |
| State origin | 83,244 | 1.6 | 145,521 | -2.1 | 1.75 | 1.81 |
| Foreign origin | 46,268 | 11.3 | 98,259 | 13.1 | 2.12 | 2.09 |
| Bilbao | 90,092 | 5.4 | 171,784 | 3.1 | 1.91 | 1.95 |
| Gipuzkoa | 110,829 | -2.3 | 212,892 | -4.4 | 1.92 | 1.96 |
| State origin | 63,683 | -4.3 | 121,034 | -7.5 | 1.90 | 1.97 |
| Foreign origin | 47,146 | 0.5 | 91,858 | -0.0 | 1.95 | 1.96 |
| Donostia / San Sebastian | 74,661 | -2.9 | 142,642 | -5.4 | 1.91 | 1.96 |

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 December 19, 2025

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 38,799 visitors and 84,830 overnight stays, representing a year-on-year increase of 2.7% in visitor numbers and 4.2% in overnight stays. In the case of Gipuzkoa, the number of visitors fell by 2.3%, and overnight stays were down 4.4%, with a total of 110,829 visitors and 212,892 overnight stays. In Bizkaia, 129,512 visitors were recorded in November 2025 (4.8% more than in November 2024) and there were 243,780 overnight stays (3.5% more than in the same month of the previous year).

By provincial capital, visitor numbers rose by 2.9% in Vitoria-Gasteiz and 5.4% in Bilbao, while they fell by 2.9% in San Sebastián. As regards overnight stays, compared to November of the previous year, they were down 5.4% in San Sebastián and increased by 4.2% in Vitoria-Gasteiz and 3.1% in Bilbao.

The average length of stay in hotel establishments in the Basque Country during November 2025 was 1.94 days, below the 1.96 days observed in the same month of the previous year¹.

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

| | Occupancy rates (%) | | | | Profitability | | | |
|--------------------------|---------------------|-------------|-------------|-------------|---------------|-------------|----------------|-------------|
| | by seats | | by rooms | | ADR (euros) | | RevPAR (euros) | |
| | 11/2025 | p.p. * | 11/2025 | p.p. * | 11/2025 | m/m-12 (%) | 11/2025 | m/m-12 (%) |
| BASQUE COUNTRY | 49.3 | -0.5 | 62.8 | 0.6 | 97.83 | 4.6 | 61.48 | 5.6 |
| Araba/Álava | 50.4 | 0.1 | 69.9 | 2.5 | 88.94 | 10.3 | 62.19 | 14.4 |
| Vitoria-Gasteiz | 53.3 | 1.6 | 76.7 | 4.6 | 80.18 | 15.0 | 61.50 | 22.4 |
| Bizkaia | 49.7 | 0.9 | 64.1 | 0.9 | 101.15 | 4.9 | 64.82 | 6.4 |
| Bilbao | 54.5 | 0.1 | 69.7 | -0.4 | 108.02 | 4.4 | 75.25 | 3.9 |
| Gipuzkoa | 48.5 | -2.3 | 58.9 | -0.5 | 97.57 | 2.5 | 57.45 | 1.5 |
| Donostia / San Sebastian | 54.2 | -1.8 | 63.5 | -0.5 | 109.69 | 1.6 | 69.63 | 0.8 |

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 December 19, 2025

Source: Eustat Tourist accommodating establishments survey

The occupancy rate for the Basque Country as a whole in November reached 49.3% in the case of beds and 62.8% in that of rooms. This means a decrease of 0.5 percentage points in the case of beds and an increase of 0.6 percentage points in that of rooms compared to November 2024.

The average daily rate (applied to a double room with a bathroom offered as room only accommodation), or ADR was 97.8 euros in November 2025 in the Basque Country, which was a rise of 4.6% in respect of November 2024. The ADR stood at 97.6 euros in Gipuzkoa, 101.2 euros in Bizkaia and 88.9 euros in Álava. The differences were even greater by provincial capital, given that the ADR reached 109.7 euros in San Sebastián, 108.0 euros in Bilbao and, lastly, it stood at 80.2 euros in Vitoria-Gasteiz.

The RevPar, or average revenue per available room, was 61.5 euros in hotel establishments in the Basque Country in November 2025, 5.6% higher than that obtained in the same month of the previous year.

Annual cumulative total

In the cumulative period for the year to date (**January- November 2025**), in comparison to the same cumulative period of the previous year, visitor numbers rose by 3.4%, and overnight stays were up 3.7%. The average length of stay, with one month remaining to complete the year, was 1.99 days in 2025, identical to that observed in the same period of the previous year.

The occupancy rate during these eleven months stood at 59.6% in the case of beds and 71.3% in that of rooms, 0.6 and 0.8 percentage points higher, respectively, than in the same cumulative period 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.

Note:

The response rate for the ETR for Hotels in November 2025 was **89.3%**. 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:**

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