

## SURVEY ON TOURIST ESTABLISHMENTS. Except hotels. November 2025

## Visitor stays in tourist apartments in the Basque Country rose by 4.7% in November 2025 while in rural accommodation they fell by 7.1%

***The number of overnight stays in tourist hostels increased by 7%***

Visitor numbers in **rural accommodation** in the Basque Country fell by 7.1% compared to the same month of the previous year and overnight stays by 11.1%, according to data prepared by Eustat. With these year-on-year variations, in November the number of visitors reached 9,593 and the number of overnight stays stood at 20,532.

### Visitors, overnight stays, average length of stay and bed occupancy rates in rural tourism establishments in the Basque Country. November 2025

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
	11/2025	m/m-12 (%)	11/2025	m/m-12 (%)	11/2025	11/2024	by seats		by rooms	
							11/2025	p.p.*	11/2025	p.p.*
<b>BASQUE COUNTRY</b>	<b>9.593</b>	<b>-7,1</b>	<b>20.532</b>	<b>-11,1</b>	<b>2,14</b>	<b>2,24</b>	<b>16,7</b>	<b>-2,0</b>	<b>21,0</b>	<b>-2,1</b>
State origin	8.300	-8,7	16.996	-15,5	2,05	2,21	-	-	-	-
Foreign origin	1.293	4,8	3.536	19,2	2,73	2,40	-	-	-	-
<b>Araba/Álava</b>	<b>1.980</b>	<b>-20,2</b>	<b>4.452</b>	<b>-16,3</b>	<b>2,25</b>	<b>2,15</b>	<b>14,2</b>	<b>-2,3</b>	<b>17,4</b>	<b>-2,9</b>
State origin	1.777	-23,8	3.506	-28,9	1,97	2,12	-	-	-	-
Foreign origin	203	37,2	946	143,2	4,66	2,63	-	-	-	-
<b>Bizkaia</b>	<b>2.614</b>	<b>-19,0</b>	<b>5.469</b>	<b>-18,5</b>	<b>2,09</b>	<b>2,08</b>	<b>16,4</b>	<b>-3,2</b>	<b>21,4</b>	<b>-3,0</b>
State origin	2.250	-23,5	4.802	-20,3	2,13	2,05	-	-	-	-
Foreign origin	364	27,3	667	-3,3	1,83	2,41	-	-	-	-
<b>Gipuzkoa</b>	<b>4.999</b>	<b>8,3</b>	<b>10.611</b>	<b>-4,0</b>	<b>2,12</b>	<b>2,40</b>	<b>18,1</b>	<b>-1,1</b>	<b>22,7</b>	<b>-1,0</b>
State origin	4.273	12,0	8.688	-5,2	2,03	2,40	-	-	-	-
Foreign origin	726	-9,3	1.923	1,9	2,65	2,36	-	-	-	-

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 23, 2025

Source: Eustat Tourist accommodating establishments survey

Following an increase of 4.8% compared to the previous November, visitors from abroad accounted for 13.5% of the total number of visitors in rural accommodation in the Basque Country during November 2025. Meanwhile, as regards overnight stays, those by visitors from abroad represented 17.2% of the total, after observing an increase of 19.2% compared to November 2024.

By province, visitor numbers fell by 20.2% in Álava and 19.0% in Bizkaia, while in Gipuzkoa they rose by 8.3%. Overnight stays were down 18.5% in Bizkaia, 16.3% in Álava and 4.0% in Gipuzkoa.

The average length of stay in this type of establishment in the Basque Country was 2.14 days in November 2025, slightly lower than the 2.24 days average length of stay observed in the same month of the previous year<sup>1</sup>.

The bed occupancy rate was 2 percentage points lower than that obtained in November 2024, standing at 16.7%. Meanwhile, the room occupancy rate saw a year-on-year decrease of 2.1 percentage points, reaching 21.0% in November 2025.

In regards to **tourist apartments**, in November 2025 there was a total of 14,789 visitors, giving rise to 55,741 overnight stays. Comparing this data with that of the previous November, the increase reached 4.7% in the case of visitor numbers and 7.7% in that of overnight stays.

Each of the accommodation units offered under a business operating unit, managed under the block or combined mode, is referred to as a tourist apartment<sup>2</sup>.

## Visitors, overnight stays, average length of stay and bed occupancy rates in tourist apartments of the Basque Country. November 2025

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
	11/2025	m/m-12 (%)	11/2025	m/m-12 (%)	11/2025	11/2024	by seats		by apartments	
							11/2025	p.p.*	11/2025	p.p.*
<b>BASQUE COUNTRY</b>	<b>14.789</b>	<b>4.7</b>	<b>55.741</b>	<b>7.7</b>	<b>3.77</b>	<b>3.66</b>	<b>31.7</b>	<b>-1.1</b>	<b>64.6</b>	<b>1.4</b>
State origin	10.546	-0.1	36.542	2.2	3.46	3.38	-	-	-	-
Foreign origin	4.243	18.9	19.198	20.0	4.52	4.48	-	-	-	-
<b>Araba/Álava</b>	<b>657</b>	<b>22.1</b>	<b>8.276</b>	<b>-3.8</b>	<b>12.60</b>	<b>15.98</b>	<b>24.8</b>	<b>-2.1</b>	<b>65.6</b>	<b>-10.0</b>
State origin	559	14.9	4.957	-13.4	8.87	11.77	-	-	-	-
Foreign origin	98	89.6	3.320	15.5	30.00	30.00	-	-	-	-
<b>Bizkaia</b>	<b>10.870</b>	<b>7.7</b>	<b>29.221</b>	<b>26.4</b>	<b>2.69</b>	<b>2.29</b>	<b>32.4</b>	<b>0.1</b>	<b>60.9</b>	<b>12.6</b>
State origin	7.732	2.1	19.174	18.1	2.48	2.14	-	-	-	-
Foreign origin	3.138	24.8	10.047	46.0	3.20	2.74	-	-	-	-
<b>Gipuzkoa</b>	<b>3.262</b>	<b>-6.8</b>	<b>18.243</b>	<b>-8.9</b>	<b>5.59</b>	<b>5.72</b>	<b>34.7</b>	<b>-2.2</b>	<b>69.1</b>	<b>-5.1</b>
State origin	2.255	-9.8	12.412	-9.9	5.50	5.51	-	-	-	-
Foreign origin	1.007	0.5	5.831	-6.6	5.79	6.23	-	-	-	-

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 23, 2025

Source: Eustat Tourist accommodating establishments survey

Visitors from abroad accounted for 28.7% of the total number of visitors and 34.4% of the total number of overnight stays in tourist apartments in the Basque Country, after registering year-on-year increases of 18.9% and 20.0%, respectively, in November.

<sup>1</sup> 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.

<sup>2</sup> Private dwellings offered, marketed or temporarily relinquished for reasons of tourism **are not included under the heading of dwellings for tourism use**.

The average length of stay in tourist apartments was 3.77 days in November 2025, slightly higher than obtained in November 2024, which stood at 3.66 days for the Basque Country as a whole. The average length of stay in this type of establishment was 12.60 days in Álava, 5.59 days in Gipuzkoa and 2.69 days in Bizkaia.

The bed occupancy rate at the Basque Country level reached 31.7% in November 2025, up 1.1 percentage points on that observed in November 2024. Meanwhile, the apartment occupancy rate increased by 1.4 percentage points to stand at 64.6%.

With regard to **tourist hostels** in the Basque Country, in November 2025, there was a year-on-year increase in visitor numbers of 7.0%, a total of 13,805 generating 25,772 overnight stays, 10.8% more than a year earlier. 8,473 visitors were recorded in Bizkaia, 4,232 in Gipuzkoa and lastly, in Álava, there were 1,100 visitors in this type of accommodation.

In November 2025, the average length of stay in tourist hostels in the Basque Country stood at 1.87 days, and the bed occupancy rate reached 25.8%, following a year-on-year increase of 0.9 percentage points.

## Visitors, overnight stays, average length of stay and bed occupancy rates in tourist hostels of the Basque Country. November 2025

	Visitors		Overnight stays		Average stay		Degree of occupation by places (%)	
	11/2025	m/m-12 (%)	11/2025	m/m-12 (%)	11/2025	11/2024	11/2025	p.p.
<b>BASQUE COUNTRY</b>	<b>13,805</b>	<b>7.0</b>	<b>25,772</b>	<b>10.8</b>	<b>1.87</b>	<b>1.80</b>	<b>25.8</b>	<b>0.9</b>
State origin	7,538	9.6	13,192	9.7	1.75	1.75	-	-
Foreign origin	6,267	4.1	12,580	11.9	2.01	1.87	-	-
<b>Araba/Álava</b>	<b>1,100</b>	<b>106.4</b>	<b>1,470</b>	<b>107.1</b>	<b>1.34</b>	<b>1.33</b>	<b>33.2</b>	<b>19.0</b>
State origin	890	75.1	1,228	79.4	1.38	1.35	-	-
Foreign origin	210	740.2	242	865.7	1.15	1.00	-	-
<b>Bizkaia</b>	<b>8,473</b>	<b>14.0</b>	<b>16,376</b>	<b>14.9</b>	<b>1.93</b>	<b>1.92</b>	<b>32.6</b>	<b>0.8</b>
State origin	4,467	16.7	7,663	13.1	1.72	1.77	-	-
Foreign origin	4,007	11.1	8,713	16.5	2.17	2.07	-	-
<b>Gipuzkoa</b>	<b>4,232</b>	<b>-14.2</b>	<b>7,926</b>	<b>-4.5</b>	<b>1.87</b>	<b>1.68</b>	<b>17.6</b>	<b>-1.6</b>
State origin	2,182	-14.3	4,301	-5.8	1.97	1.79	-	-
Foreign origin	2,050	-14.2	3,625	-3.0	1.77	1.56	-	-

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)

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### Cumulative data (January- November 2025)

For 2025 to date, **rural accommodation** in the Basque Country attained 171,538 visitors and 445,862 overnight stays; in both cases 5.1% more than those obtained for the same cumulative period of 2024. The average stay was 2.60 days, identical to that of the previous year. The bed occupancy rate reached 32.2%, compared to the 30.2% obtained in the same cumulative period of 2024. The room occupancy rate also exceeded the 35.1% obtained in 2024, standing at 37.4% for these eleven months of 2025.

As regards **tourist apartments**, in the cumulative period until November, visitor numbers reached 260,433, resulting in 774,079 overnight stays; this was an increase in respect of the same period of 2024 of 30.6% in the case of visitor numbers and 16.3% in that of overnight stays. The average length of stay was 2.97 days in these eleven months of 2025, compared to the 3.34 days observed in the same period of 2024. The bed occupancy rate stood at 40.2%, identical to the figure achieved in the same period of 2024. The apartment occupancy rate, reached 71.9%, 5.4 percentage points above that obtained in the equivalent period of 2024.

Referring to **tourist hostels**, in 2025 to date they have accumulated 253,290 visitors and 455,257 overnight stays, following increases of 4.7% in the case of visitor numbers and 4.2% in that of overnight stays, compared to the same months of 2024. The average stay was 1.80 days, slightly below the 1.81 days in the cumulative period of the previous year. Lastly, the bed occupancy rate was 40.6%, 0.7 percentage points higher than that obtained during the same cumulative period of 2024.

**Note:**

The response rate for the Survey on Tourist Establishments this month was **91.2%** for Rural Accommodation, **84.5%** for Tourist Apartments and **88.1%** for Tourist Hostels. Eustat would like to thank all establishments that participated in this survey for their effort.

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