

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. March 2025

Visitor numbers and overnight stays in hotel establishments in the Basque Country fell by 6.4% and 6.3% in March 2025

The average length of stay was 1.92 days, the same value as in March 2024

In **March 2025**, visitor numbers at hotel establishments in the Basque Country decreased by 6.4% in year-on-year terms and overnight stays were down 6.3%, according to Eustat data. It should be noted that in 2024 Easter was celebrated in March, the month with which March of this year is compared, while in 2025 it is celebrated in April. The 281,462 registered visitors gave rise to a total of 539,566 overnight stays.

Foreign tourists accounted for 38.5% of visitors and 40.6% of overnight stays, following year-on-year decreases of 5.8% in the case of visitors and 3.1% in that of overnight stays.

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

	Visitors		Overnight stays		Average stay	
	03/2025	m/m-12 (%)	03/2025	m/m-12 (%)	03/2025	03/2024
BASQUE COUNTRY	281.462	-6,4	539.566	-6,3	1,92	1,92
State origin	173.236	-6,8	320.469	-8,4	1,85	1,88
Foreign origin	108.226	-5,8	219.097	-3,1	2,02	1,97
Araba/Álava	36.984	-11,2	81.433	-5,5	2,20	2,07
State origin	28.211	-12,6	58.310	-6,8	2,07	1,94
Foreign origin	8.773	-6,3	23.123	-2,1	2,64	2,52
Vitoria-Gasteiz	29.596	-9,5	68.930	-3,4	2,33	2,18
Bizkaia	128.894	2,0	238.618	-0,6	1,85	1,90
State origin	78.216	0,1	135.407	-3,4	1,73	1,79
Foreign origin	50.678	5,2	103.211	3,4	2,04	2,07
Bilbao	94.049	9,5	176.839	7,0	1,88	1,92
Gipuzkoa	115.584	-12,9	219.515	-12,1	1,90	1,88
State origin	66.809	-11,4	126.752	-13,8	1,90	1,95
Foreign origin	48.775	-14,9	92.763	-9,6	1,90	1,79
Donostia / San Sebastian	77.151	-15,4	148.144	-13,6	1,92	1,88

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 April 22, 2025

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 36,984 visitors and 81,433 overnight stays, down 11.2% and 5.5% compared to the previous February, respectively. In Bizkaia, 128,894 visitors were recorded in March 2025 (2.0% more than in March 2024) which gave rise to 238,618 overnight stays (0.6% less than in the same month of the previous year). In Gipuzkoa, visitor numbers fell by 12.9%, and overnight stays were down 12.1%, with a total of 115,584 visitors and 219,515 overnight stays.

By provincial capital, visitor numbers fell by 9.5% in Vitoria-Gasteiz and 15.4% in San Sebastián, while they rose by 9.5% in Bilbao. Likewise, overnight stays fell by 3.4% in Vitoria-Gasteiz and 13.6% in San Sebastián, rising by 7.0% in Bilbao.

The average length of stay in hotel establishments in the Basque Country during March 2025 was 1.92 days, identical to that observed in the same month of the previous year. 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.

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

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	03/2025	p.p. *	03/2025	p.p. *	03/2025	m/m-12 (%)	03/2025	m/m-12 (%)
BASQUE COUNTRY	48,6	-4,6	60,2	-3,8	89,03	-3,9	53,56	-9,7
Araba/Álava	49,5	-2,5	65,5	1,4	76,33	-3,3	50,01	-1,1
Vitoria-Gasteiz	52,4	-2,1	72,0	2,8	67,34	-1,7	48,47	2,3
Bizkaia	47,7	-2,8	59,5	-3,5	89,67	-6,6	53,37	-11,7
Bilbao	54,7	-1,9	67,3	-3,4	95,16	-8,4	64,04	-12,8
Gipuzkoa	49,5	-7,1	59,0	-6,0	93,25	-0,8	55,01	-10,0
Donostia / San Sebastian	55,4	-6,4	64,3	-6,4	106,40	0,8	68,37	-8,3

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 April 22, 2025

Source: Eustat Tourist accommodating establishments survey

The occupancy rate for the Basque Country as a whole in March 2025 was 48.6% in the case of beds and 60.2% in that of rooms. This was an decrease of 4.6 and 3.8 percentage points respectively compared to March 2024.

The average daily rate (applied to a double room with a bathroom offered as room only accommodation), or ADR was 89.0 euros in March 2025 in the Basque Country, which was a drop of 3.9% compared to the previous March. The ADR stood at 93.3 euros in Gipuzkoa, 89.7 euros in Bizkaia and 76.3 euros in Álava. By capital, the values obtained for the ADR were: 106.4 euros in San Sebastián, 95.2 euros in Bilbao and 67.3 euros in Vitoria-Gasteiz.

Finally, the RevPar, or average revenue per available room in hotel establishments, in the Basque Country in March 2025 was 53.6 euros, 9.7% lower than in the same month of the previous year.

Note:

The response rate for the ETR for Hotels in March 2025 was **95.5%**. 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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