

SURVEY ON TOURIST ESTABLISHMENTS. Except hotels. March 2025

Overnight stays in rural accommodation in the Basque Country fell by 36.8% in March 2025, and in tourist apartments they were down 0.5%, due to the calendar effect of Holy Week

The decrease in the number of overnight stays in tourist hostels stood at 10.7% in respect of March of the previous year

The number of overnight stays in **rural accommodation** in the Basque Country fell by 36.8% in **March 2025** compared to the same month of the previous year, according to Eustat data. The number of visitors stood at 8,927, representing a drop of 26.8% in year-on-year terms, and led to 19,851 overnight stays. It must be taken into account that in 2024 Easter was in March, the month with which March of this year is compared, while in 2025 it was in April.

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

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
	03/2025	m/m-12 (%)	03/2025	m/m-12 (%)	03/2025	03/2024	by seats		by rooms	
							p.p.*	03/2025	p.p.*	03/2025
BASQUE COUNTRY	8.927	-26,8	19.851	-36,8	2,22	2,58	17,0	-8,1	20,8	-8,5
State origin	7.639	-27,1	16.889	-38,2	2,21	2,61	-	-	-	-
Foreign origin	1.288	-25,1	2.962	-27,5	2,30	2,38	-	-	-	-
Araba/Álava	1.325	-45,1	3.216	-47,7	2,43	2,55	10,5	-9,1	13,5	-9,8
State origin	1.196	-45,4	2.657	-54,3	2,22	2,66	-	-	-	-
Foreign origin	129	-42,2	559	67,9	4,33	1,49	-	-	-	-
Bizkaia	1.886	-48,7	3.846	-57,2	2,04	2,45	11,9	-13,8	14,9	-15,8
State origin	1.685	-47,4	3.458	-57,5	2,05	2,54	-	-	-	-
Foreign origin	201	-57,1	388	-54,7	1,93	1,83	-	-	-	-
Gipuzkoa	5.716	-6,5	12.789	-21,4	2,24	2,66	23,6	-4,1	28,6	-3,0
State origin	4.758	-6,4	10.774	-19,4	2,26	2,63	-	-	-	-
Foreign origin	958	-6,9	2.015	-30,5	2,10	2,82	-	-	-	-

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 25, 2025

Source: Eustat Tourist accommodating establishments survey

85.6% of visitors registered at rural accommodation in the Basque Country in March 2025 were from within Spain, which was a decrease of 27.1% in relation to the same month of the previous year. In the case of overnight stays, which fell by 36.8% in year-on-year terms, these accounted for 85.1% of those registered in March.

The year-on-year decrease in visitor numbers reached 45.1% in Álava. In Bizkaia there was a fall of 48.7%, while in Gipuzkoa the drop stood at 6.5%. Overnight stays were also down compared to March of the previous year, falling by 57.2% in the case of Bizkaia, 47.7% in Álava and 21.4% in Gipuzkoa.

The average length of stay in this type of establishment in the Basque Country was 2.22 days in March, a figure lower than the average length of stay of 2.58 days observed in the same month of 2024. 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.

The bed occupancy rate showed a year-on-year decrease of 8.1 percentage points, standing at 17.0%. The room occupancy rate, following a year-on-year drop of 8.5 percentage points, stood at 20.8%.

As regards **tourist apartments**, in March 2025 they welcomed a total of 15,277 visitors, resulting in 53,895 overnight stays. Compared to the previous March, the decreases were 2.8% in the case of visitor numbers and 0.5% 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. Private dwellings offered, marketed or temporarily relinquished for reasons of tourism are not included under the heading of dwellings for tourism use.

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

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
	03/2025	m/m-12 (%)	03/2025	m/m-12 (%)	03/2025	03/2024	03/2025	p.p. *	03/2025	p.p. *
BASQUE COUNTRY	15.277	-2.8	53.895	-0.5	3,53	3,45	31,3	-5,1	59,2	-4,7
State origin	10.903	-6,6	35.742	-4,3	3,28	3,20	-	-	-	-
Foreign origin	4.374	8,3	18.153	7,8	4,15	4,17	-	-	-	-
Araba/Álava	461	-44,3	8.788	-2,5	19,04	10,89	26,9	-1,3	73,6	-6,5
State origin	391	-48,8	5.251	-16,5	13,42	8,22	-	-	-	-
Foreign origin	70	11,2	3.537	29,6	31,00	31,00	-	-	-	-
Bizkaia	10.318	-4,6	25.205	6,1	2,44	2,20	30,3	-6,0	46,4	-0,6
State origin	7.440	-5,2	17.243	9,3	2,32	2,01	-	-	-	-
Foreign origin	2.878	-2,9	7.962	-0,3	2,77	2,69	-	-	-	-
Gipuzkoa	4.497	10,3	19.902	-7,0	4,43	5,25	35,1	-6,4	68,8	-5,3
State origin	3.072	0,2	13.248	-13,3	4,31	4,99	-	-	-	-
Foreign origin	1.425	41,0	6.654	8,6	4,67	6,06	-	-	-	-

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 25, 2025

Source: Eustat Tourist accommodating establishments survey

Visitors from within Spain accounted for 71.4% of visitors and 66.3% of overnight stays in tourist apartments, after registering year-on-year decreases of 6.6% and 4.3%, respectively.

The average length of stay for this type of establishment was 3.53 days in March 2025, slightly higher than that obtained in March 2024, which was 3.45 days.

The bed occupancy rate at the Basque Country level reached 31.3%, following a drop of 5.1 percentage points in relation to March 2024. The apartment occupancy rate fell by 4.7 percentage points to stand at 59.2%.

Finally, with regard to **tourist hostels**, in **March 2025** visitor numbers and overnight stays totalled 15,608 and 29,096, respectively. In relation to March of the previous year, these totals meant a decrease of 15.1% in the case of visitor numbers and 10.7% in that of overnight stays.

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

	Visitors		Overnight stays		Average stay		Degree of occupation by places (%)	
	03/2025	m/m-12 (%)	03/2025	m/m-12 (%)	03/2025	03/2024	03/2025	p.p.
BASQUE COUNTRY	15.608	-15.1	29.096	-10.7	1.86	1.77	29.0	-3.2
State origin	8.488	-9.4	15.591	-0.6	1.84	1.67	-	-
Foreign origin	7.120	-20.9	13.505	-20.1	1.90	1.88	-	-
Araba/Álava	381	55.9	489	8.2	1.28	1.85	10.9	1.8
State origin	314	35.1	422	-1.8	1.34	1.85	-	-
Foreign origin	67	469.4	67	203.7	1.00	1.88	-	-
Bizkaia	9.032	-18.9	16.675	-18.4	1.85	1.84	32.8	-6.0
State origin	5.144	-7.7	9.656	2.9	1.88	1.68	-	-
Foreign origin	3.888	-30.2	7.019	-36.6	1.81	1.99	-	-
Gipuzkoa	6.195	-11.4	11.932	2.0	1.93	1.67	26.5	-0.3
State origin	3.030	-15.1	5.513	-6.1	1.82	1.65	-	-
Foreign origin	3.165	-7.6	6.419	10.3	2.03	1.70	-	-

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 25, 2025

Source: Eustat Tourist accommodating establishments survey

The average length of stay in tourist hostels in the Basque Country in March 2025 was 1.86 days, as opposed to the 1.77 days observed in March 2024. Lastly, the occupancy rate was 29.0%, 3.2 points lower than that registered in the same month of the previous year.

Note:

The response rate of the Survey on Tourist Establishments in March 2025 was **98.5%** for Rural Accommodation, **93.2%** for Tourist Apartments and **91.3%** in the case of Tourist Hostels.

Eustat would like to thank all establishments that participated in this survey for their effort.

For further information:

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