

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. June 2025

Visitors to hotel establishments in the Basque Country increased by 9.8% and overnight stays were up 8.7% in June 2025

The average daily rate (ADR) stood at 138.3 euros in June 2025, up 8% on the previous year

In **June 2025**, visitors to hotel establishments in the Basque Country increased by 9.8% and overnight stays were up 8.7% compared to June 2024, according to Eustat data. The 368,409 registered visitors gave rise to a total of 729,870 overnight stays.

Foreign tourists accounted for 52.4% of visitors and 54.3% of overnight stays, following rises of 11.0% in the case of visitors and 10.2% in that of overnight stays. In turn, the number of visitors and overnight stays from the rest of Spain increased in year-on-year terms by 8.6% and 6.9%, respectively.

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

	Visitors		Overnight stays		Average stay	
	06/2025	m/m-12 (%)	06/2025	m/m-12 (%)	06/2025	06/2024
BASQUE COUNTRY	368,409	9.8	729,870	8.7	1.98	2.00
State origin	175,431	8.6	333,261	6.9	1.90	1.93
Foreign origin	192,978	11.0	396,609	10.2	2.06	2.07
Araba/Álava	45,573	1.9	95,045	4.3	2.09	2.04
State origin	30,162	1.7	62,098	1.8	2.06	2.06
Foreign origin	15,411	2.1	32,947	9.5	2.14	1.99
Vitoria-Gasteiz	33,392	0.9	74,284	3.2	2.22	2.18
Bizkaia	167,392	10.7	316,907	9.6	1.89	1.91
State origin	82,265	10.2	151,835	9.0	1.85	1.87
Foreign origin	85,127	11.2	165,072	10.1	1.94	1.96
Bilbao	110,842	11.2	212,210	10.4	1.91	1.93
Gipuzkoa	155,444	11.5	317,918	9.1	2.05	2.09
State origin	63,004	10.1	119,328	7.0	1.89	1.95
Foreign origin	92,440	12.5	198,590	10.4	2.15	2.19
Donostia / San Sebastian	94,952	7.4	206,904	6.5	2.18	2.20

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 July 21, 2025

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 45,573 visitors and 95,045 overnight stays, representing increases of 1.9% and 4.3%, respectively, compared to the previous year. In Bizkaia, growth reached 10.7% in the case of visitors and 9.6% in that of overnight stays, with a total of 167,392 visitors and 316,907 overnight

stays. In Gipuzkoa, 155,444 visitors were recorded in June 2025 (11.5% more than in June 2024) and there were 317,918 overnight stays (9.1% more than in the same month of the previous year).

By provincial capital, visitor numbers increased in respect of the previous June by 0.9% in Vitoria-Gasteiz, 7.4% in San Sebastián and 11.2% in Bilbao. In the case of overnight stays, they rose by 3.2% in Vitoria-Gasteiz, 6.5% in San Sebastián and 10.4% in Bilbao.

The average length¹ of stay in hotel establishments in the Basque Country during June 2025 was 1.98 days, slightly lower than the 2.00 days observed in the same month of the previous year.

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

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	06/2025	p.p. *	06/2025	p.p. *	06/2025	m/m-12 (%)	06/2025	m/m-12 (%)
BASQUE COUNTRY	65.1	3.2	79.4	4.0	138.33	8.0	109.76	13.7
Araba/Álava	58.2	1.9	76.4	4.9	98.16	7.3	75.00	14.6
Vitoria-Gasteiz	58.3	1.4	80.4	5.4	82.38	12.9	66.24	20.9
Bizkaia	62.8	3.3	78.8	3.5	125.20	5.4	98.63	10.2
Bilbao	66.8	2.6	83.2	2.4	140.11	5.2	116.51	8.3
Gipuzkoa	70.2	3.6	81.0	4.2	165.58	10.3	134.10	16.4
Donostia / San Sebastian	76.0	4.8	85.8	4.9	208.38	12.7	178.75	19.5

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 July 21, 2025

Source: Eustat Tourist accommodating establishments survey

The occupancy rate in June 2025 for the Basque Country as a whole was 65.1% in the case of beds and 79.4% in that of rooms. Compared to June 2024, this was an increase of 3.2 percentage points in the case of beds and 4.0 percentage points in that of rooms.

Profitability, measured using the ADR or average daily rate (applied to a double room with a bathroom offered as room only accommodation), was 138.3 euros in June 2025 in the Basque Country, which was a rise of 8.0% in respect of June 2024. In the case of Gipuzkoa, the ADR reached 165.6 euros, in Bizkaia it was 125.2 euros and in Álava it stood at 98.2 euros. By provincial capital, the differences were greater, given that the ADR was 208.4 euros in San Sebastián, 140.1 euros in Bilbao and, lastly, 82.4 euros in Vitoria-Gasteiz.

The RevPar, or average revenue per available room in hotel establishments in the Basque Country in June 2025 was 109.8 euros, 13.7% higher than in the same month of the previous year.

Annual cumulative total

In the cumulative period in the year to date (**January-June 2025**), compared to the same cumulative period of the previous year, visitor numbers rose by 4.6%, and overnight stays were up 5.4%. The

¹The 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.

average length of stay during these six months was 1.93 days in 2025, compared to the 1.91 days observed in the same cumulative period of the previous year.

The occupancy rate during the first six months of the year stood at 54.0% in the case of beds and 65.7% in that of rooms, 1.0 and 0.9 percentage points more than in the same cumulative period of the previous year.

Note:

The response rate of the ETR for Hotels in June 2025 was **92.7%**. 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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