

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. September 2025

In September 2025, overnight stays at hotel establishments in the Basque Country increased by 2.3% compared to September 2024

The cumulative number of overnight stays during the three summer months of 2025 was 1.9% higher than in 2024

In **September 2025**, visitor numbers at hotel establishments in the Basque Country increased by 1.3% in year-on-year terms and overnight stays were up 2.3%, according to Eustat data. The 364,088 recorded visitors gave rise to a total of 748,708 overnight stays.

Foreign tourists accounted for 55.8% of visitors and 56.9% of overnight stays, with visitor numbers rising by 2.7% and overnight stays by 5.6% in year-on-year terms.

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

| | Visitors | | Overnight stays | | Average stay | |
|--------------------------|----------------|--------------|-----------------|-------------|--------------|-------------|
| | 09/2025 | m/m-12 (%) | 09/2025 | m/m-12 (%) | 09/2025 | 09/2024 |
| BASQUE COUNTRY | 364,088 | 1.3 | 748,708 | 2.3 | 2.06 | 2.04 |
| State origin | 161,020 | -0.5 | 322,683 | -1.8 | 2.00 | 2.03 |
| Foreign origin | 203,068 | 2.7 | 426,025 | 5.6 | 2.10 | 2.04 |
| Araba/Álava | 46,149 | -10.7 | 104,096 | 2.1 | 2.26 | 1.97 |
| State origin | 28,882 | -13.2 | 64,262 | -4.5 | 2.22 | 2.02 |
| Foreign origin | 17,267 | -6.1 | 39,834 | 14.9 | 2.31 | 1.88 |
| Vitoria-Gasteiz | 33,218 | -14.6 | 79,632 | -0.0 | 2.40 | 2.05 |
| Bizkaia | 170,893 | 7.4 | 332,505 | 5.0 | 1.95 | 1.99 |
| State origin | 73,463 | 5.6 | 136,318 | 0.1 | 1.86 | 1.96 |
| Foreign origin | 97,430 | 8.8 | 196,187 | 8.6 | 2.01 | 2.02 |
| Bilbao | 114,954 | 9.9 | 230,290 | 6.9 | 2.00 | 2.06 |
| Gipuzkoa | 147,046 | -1.1 | 312,107 | -0.4 | 2.12 | 2.11 |
| State origin | 58,675 | -0.6 | 122,103 | -2.5 | 2.08 | 2.12 |
| Foreign origin | 88,371 | -1.4 | 190,004 | 1.1 | 2.15 | 2.10 |
| Donostia / San Sebastian | 88,412 | -6.7 | 199,926 | -5.3 | 2.26 | 2.23 |

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 October 20, 2025

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 46,149 visitors and 104,096 overnight stays, representing a year-on-year decrease in visitor numbers of 10.7%, but an increase in overnight stays of 2.1%. In the case of Gipuzkoa, the number of visitors fell by 1.1%, and overnight stays were down 0.4%, with a total of 147,046 visitors and 312,107 overnight stays. In Bizkaia, 170,893 visitors were recorded in September 2025 (7.4% more than in September 2024) and there were 332,505 overnight stays (5.0% more than in the same month of the previous year).

By provincial capital, visitor numbers fell by 14.6% in Vitoria-Gasteiz and 6.7% in San Sebastián, while they rose by 9.9% in Bilbao. As for overnight stays, compared to September of the previous year, they were down 5.3% in San Sebastián, remained unchanged in Vitoria-Gasteiz, and were up 6.9% in Bilbao.

The average length of stay in hotel establishments in the Basque Country during September 2025 was 2.06 days, slightly higher than the 2.04 days observed in the same month of the previous year¹.

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

| | Occupancy rates (%) | | | | Profitability | | | |
|--------------------------|---------------------|-------------|-------------|-------------|---------------|------------|----------------|-------------|
| | by seats | | by rooms | | ADR (euros) | | RevPAR (euros) | |
| | 09/2025 | p.p. * | 09/2025 | p.p. * | 09/2025 | m/m-12 (%) | 09/2025 | m/m-12 (%) |
| BASQUE COUNTRY | 66.6 | 0.3 | 80.8 | 1.0 | 146.58 | 8.5 | 118.37 | 9.8 |
| Araba/Álava | 63.1 | 1.1 | 85.0 | 6.1 | 100.80 | 9.5 | 85.64 | 17.8 |
| Vitoria-Gasteiz | 61.9 | 0.1 | 88.0 | 6.0 | 82.65 | 14.7 | 72.75 | 23.2 |
| Bizkaia | 66.2 | 1.9 | 80.1 | 1.3 | 131.32 | 9.8 | 105.22 | 11.5 |
| Bilbao | 72.6 | 2.0 | 86.6 | 1.2 | 149.19 | 10.5 | 129.15 | 12.1 |
| Gipuzkoa | 68.2 | -1.6 | 80.0 | -1.1 | 180.10 | 8.4 | 144.12 | 6.9 |
| Donostia / San Sebastian | 73.0 | -4.1 | 83.8 | -5.1 | 231.69 | 12.9 | 194.07 | 6.4 |

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 October 20, 2025

Source: Eustat Tourist accommodating establishments survey

The occupancy rate for the Basque Country as a whole in September reached 66.6% in the case of beds and 80.8% in that of rooms. In relation to September 2024, this meant an increase of 0.3 and 1.0 percentage points, respectively.

The average daily rate (applied to a double room with a bathroom offered as room only accommodation), or ADR, was 146.6 euros in September 2025 in the Basque Country, which was a rise of 8.5% in respect of September the previous year. The ADR stood at 180.1 euros in Gipuzkoa, 131.3 euros in Bizkaia and 100.8 euros in Álava. The differences were even greater by provincial capital, given that the ADR reached 231.7 euros in San Sebastián, 149.2 euros in Bilbao and, lastly, it stood at 82.7 euros in Vitoria-Gasteiz.

The RevPar, or average revenue per available room, was 118.4 euros in hotel establishments in the Basque Country in September 2025, 9.8% higher than that obtained in the same month of the previous year.

Annual cumulative total

In the cumulative period in the year to date (**January-September 2025**), in comparison to the same cumulative period of the previous year, visitor numbers rose by 3.3%, and overnight stays by 3.9%. The average length of stay during these nine months was 2.00 days in 2025, very similar to the 1.99 days observed in the same 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.

The occupancy rate during the first three quarters of the year stood at 60.4% in the case of beds and 71.6% in that of rooms, 1.0 and 1.1 percentage points higher, respectively, than in the same cumulative period of the previous year.

Balance for summer 2025

Over the three summer months, the room occupancy rate was 82.8%, 0.7 percentage points higher than summer 2024

During the three summer months as a whole (July, August and September 2025), 1,189,309 visitors were recorded at hotel establishments in the Basque Country, resulting in a total of 2,507,719 overnight stays, which represented increases in respect of the same cumulative period of the previous year of 1.4% and 1.9%, respectively.

Entries, overnight stays, average stay and occupancy rates in hotel establishments in the Basque Country by origin. Summer(*). 2025

| | Visitors | | Overnight stays | | | Average stay | | Occupancy rates (%) | | | |
|--------------------------|------------------|---------------|------------------|---------------|-------------|---------------|-------------|---------------------|-------------|-------------|--|
| | 2025 | 2025/2024 (%) | 2025 | 2025/2024 (%) | 2025 | 2025/2024 (%) | by seats | | by rooms | | |
| | | | | | | | 2025 | p.p.* | 2025 | p.p.* | |
| BASQUE COUNTRY | 1,189,309 | 1.4 | 2,507,719 | 1.9 | 2.11 | 2.10 | 72.3 | -0.0 | 82.8 | 0.7 | |
| State origin | 523,723 | -1.8 | 1,113,184 | -3.0 | 2.13 | 2.15 | - | - | - | - | |
| Foreign origin | 665,586 | 4.1 | 1,394,535 | 6.2 | 2.10 | 2.05 | - | - | - | - | |
| Araba/Álava | 155,699 | -8.6 | 332,264 | -2.7 | 2.13 | 2.00 | 65.8 | -2.0 | 83.5 | 3.2 | |
| State origin | 93,381 | -9.5 | 207,242 | -7.2 | 2.22 | 2.17 | - | - | - | - | |
| Foreign origin | 62,318 | -7.4 | 125,022 | 5.8 | 2.01 | 1.76 | - | - | - | - | |
| Vitoria-Gasteiz | 115,583 | -11.8 | 258,103 | -4.6 | 2.23 | 2.06 | 68.8 | -6.8 | 87.4 | 0.7 | |
| Bizkaia | 551,306 | 5.7 | 1,109,240 | 4.2 | 2.01 | 2.04 | 71.3 | 1.4 | 81.3 | 0.7 | |
| State origin | 242,621 | 2.7 | 488,737 | -0.7 | 2.01 | 2.08 | - | - | - | - | |
| Foreign origin | 308,685 | 8.1 | 620,503 | 8.4 | 2.01 | 2.00 | - | - | - | - | |
| Bilbao | 368,625 | 7.1 | 746,391 | 5.8 | 2.02 | 2.05 | 73.2 | 2.7 | 82.7 | -2.7 | |
| Gipuzkoa | 482,304 | 0.4 | 1,066,215 | 1.1 | 2.21 | 2.20 | 75.6 | -0.9 | 84.3 | -0.3 | |
| State origin | 187,721 | -3.2 | 417,205 | -3.4 | 2.22 | 2.23 | - | - | - | - | |
| Foreign origin | 294,583 | 2.8 | 649,010 | 4.2 | 2.20 | 2.17 | - | - | - | - | |
| Donostia / San Sebastian | 287,838 | -3.5 | 679,986 | -2.6 | 2.36 | 2.34 | 84.8 | 1.8 | 90.4 | -0.0 | |

(*)Months of July, August and September

p.p.*= difference in percentage points on the same month of the previous year

Date October 20, 2025

Source: Eustat Tourist accommodating establishments survey

Visitors from abroad increased by 4.1% compared to summer 2024 and overnight stays rose by 6.2%.

Álava accumulated 332,264 overnight stays during these three months, 2.7% fewer than during the previous summer. Gipuzkoa registered a total of 1,066,215 overnight stays, following a year-on-year increase of 1.1%. Bizkaia, with a total of 1,109,240 overnight stays, saw a rise of 4.2% in relation to summer of the previous year.

The average length of stay calculated for summer 2025 reached 2.11 days, slightly above the 2.10 days observed during the previous summer.

The occupancy rate in hotel establishments in the Basque Country as a whole reached 72.3% in the case of beds and 82.8% in the case of rooms, which meant a variation of 0.0 and 0.7 percentage points, respectively, compared to summer 2024.

By province, Gipuzkoa stood out with a bed occupancy rate of 75.6%, followed by Bizkaia with 71.3% and, finally, Álava with 65.8%. In the case of rooms, the occupancy rate reached 84.3% in Gipuzkoa, 83.5% in Álava and 81.3% in Bizkaia.

By provincial capital, San Sebastián saw the highest occupancy rates: 84.8% for beds and 90.4% for rooms. In Bilbao, the occupancy rates were 73.2% in the case of beds and 82.7% in that of rooms, and, lastly, in Vitoria-Gasteiz, these stood at 68.8% and 87.4%, respectively.

Note:

The response rate for the ETR for Hotels in September 2025 was **93.5%**. 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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