

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

## Overnight stays in rural accommodation in the Basque Country increased by 6.2% in September 2025, and in tourist apartments they rose by 20.4%

*During the three summer months, overnight stays were up 4.0% in rural accommodation and 15.2% in tourist apartments*

Visitor numbers in **rural accommodation** in the Basque Country rose by 11.2% in **September 2025** in respect of the same month of the previous year, while overnight stays were up 6.2%, according to Eustat data. With these year-on-year variations, in September the number of visitors reached 19,651 and the number of overnight stays stood at 47,340.

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

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
							by seats		by rooms	
	09/2025	m/m-12 (%)	09/2025	m/m-12 (%)	09/2025	09/2024	09/2025	p.p. *	09/2025	p.p. *
<b>BASQUE COUNTRY</b>	<b>19,651</b>	<b>11.2</b>	<b>47,340</b>	<b>6.2</b>	<b>2.41</b>	<b>2.52</b>	<b>35.1</b>	<b>2.0</b>	<b>42.2</b>	<b>1.9</b>
State origin	13,285	17.6	32,069	8.7	2.41	2.61	-	-	-	-
Foreign origin	6,366	-0.1	15,271	1.5	2.40	2.36	-	-	-	-
<b>Álava</b>	<b>3,530</b>	<b>27.0</b>	<b>7,933</b>	<b>28.2</b>	<b>2.25</b>	<b>2.23</b>	<b>25.1</b>	<b>5.9</b>	<b>29.3</b>	<b>4.2</b>
State origin	2,728	41.2	6,293	50.1	2.31	2.17	-	-	-	-
Foreign origin	802	-5.4	1,640	-17.8	2.04	2.35	-	-	-	-
<b>Bizkaia</b>	<b>7,025</b>	<b>18.2</b>	<b>16,110</b>	<b>17.0</b>	<b>2.29</b>	<b>2.32</b>	<b>40.5</b>	<b>6.2</b>	<b>47.1</b>	<b>7.2</b>
State origin	4,245	11.2	10,282	8.7	2.42	2.48	-	-	-	-
Foreign origin	2,780	30.9	5,828	35.3	2.10	2.03	-	-	-	-
<b>Gipuzkoa</b>	<b>9,096</b>	<b>1.7</b>	<b>23,297</b>	<b>-5.3</b>	<b>2.56</b>	<b>2.75</b>	<b>36.7</b>	<b>-2.9</b>	<b>45.3</b>	<b>-2.9</b>
State origin	6,312	13.8	15,494	-2.3	2.45	2.86	-	-	-	-
Foreign origin	2,784	-18.1	7,803	-10.8	2.80	2.57	-	-	-	-

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 21, 2025

Source: Eustat Tourist accommodating establishments survey

Following a slight decrease of 0.1% compared to the previous September, visitors from abroad accounted for 32.4% of the total number of visitors in Basque Country rural accommodation in September 2025. Meanwhile, as regards overnight stays, those by visitors from abroad represented 32.3% of the total, after rising by 1.5% compared to September 2024.

By province, visitor numbers were up 27.0% in Álava and 18.2% in Bizkaia, while Gipuzkoa recorded a more moderate increase of 1.7%. With regard to overnight stays, they rose by 28.2% in Álava and 17.0% in Bizkaia, while in Gipuzkoa they were down 5.3% in year-on-year terms.

The average length of stay in this type of establishment in the Basque Country was 2.41 days in September 2025, below the 2.52 days average length of stay observed in the same month of the previous year<sup>1</sup>.

The bed occupancy rate was 2.0 percentage points higher than that obtained in September 2024, standing at 35.1%. Meanwhile, the room occupancy rate saw a year-on-year increase of 1.9 percentage points, rising to 42.2% in September 2025.

In relation to **tourist apartments**, in September 2025 there were a total of 26,526 visitors, resulting in 79,474 overnight stays. Comparing this data with that of the previous September, the increase reached 35.0% in the case of visitor numbers and 20.4% 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. September 2025

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
							by seats		by apartments	
	09/2025	m/m-12 (%)	09/2025	m/m-12 (%)	09/2025	09/2024	09/2025	p.p. *	09/2025	p.p. *
<b>BASQUE COUNTRY</b>	<b>26,526</b>	<b>35.0</b>	<b>79,474</b>	<b>20.4</b>	<b>3.00</b>	<b>3.36</b>	<b>43.8</b>	<b>1.9</b>	<b>79.6</b>	<b>6.7</b>
State origin	13,782	20.0	42,477	10.5	3.08	3.35	-	-	-	-
Foreign origin	12,744	56.0	36,997	34.3	2.90	3.37	-	-	-	-
<b>Araba/Álava</b>	<b>756</b>	<b>-32.5</b>	<b>11,083</b>	<b>19.7</b>	<b>14.67</b>	<b>8.27</b>	<b>33.3</b>	<b>3.8</b>	<b>73.8</b>	<b>-4.6</b>
State origin	579	-39.3	7,466	15.0	12.90	6.81	-	-	-	-
Foreign origin	177	5.8	3,617	30.9	20.46	16.54	-	-	-	-
<b>Bizkaia</b>	<b>19,140</b>	<b>42.2</b>	<b>40,527</b>	<b>29.3</b>	<b>2.12</b>	<b>2.33</b>	<b>45.1</b>	<b>0.8</b>	<b>79.7</b>	<b>18.0</b>
State origin	9,719	25.9	19,828	16.4	2.04	2.21	-	-	-	-
Foreign origin	9,421	64.2	20,700	44.7	2.20	2.49	-	-	-	-
<b>Gipuzkoa</b>	<b>6,630</b>	<b>30.7</b>	<b>27,864</b>	<b>9.7</b>	<b>4.20</b>	<b>5.01</b>	<b>47.5</b>	<b>2.0</b>	<b>81.8</b>	<b>-0.8</b>
State origin	3,484	24.0	15,184	1.8	4.36	5.31	-	-	-	-
Foreign origin	3,147	39.1	12,681	21.0	4.03	4.63	-	-	-	-

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 21, 2025

Source: Eustat Tourist accommodating establishments survey

Visitors from abroad accounted for 48.0% of the total number of visitors and 46.6% of the total number of overnight stays in tourist apartments in the Basque Country, after registering year-on-year increases of 56.0% and 34.3%, respectively, during September.

<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 3.00 days in September 2025, below that obtained in September 2024, which stood at 3.36 days for the Basque Country as a whole. The average length of stay in this type of establishment was 14.67 days in Álava, 4.20 days in Gipuzkoa and 2.12 days in Bizkaia.

The bed occupancy rate at the Basque Country level reached 43.8% in September 2025, up 1.9 percentage points on that observed in September 2024. Meanwhile, the apartment occupancy rate increased by 6.7 percentage points to stand at 79.6%.

With regard to **tourist hostels** in the Basque Country, in September 2025, there was a year-on-year increase in visitor numbers of 5.8%, with a total of 26,346 visitors generating 46,780 overnight stays, 13.3% more than a year earlier. 15,584 visitors were recorded in Bizkaia, 9,637 in Gipuzkoa and lastly, in Álava, there were 1,125 visitors in this type of accommodation.

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

	Visitors		Overnight stays		Average stay		Degree of occupation by places (%)	
	09/2025	m/m-12 (%)	09/2025	m/m-12 (%)	09/2025	09/2024	09/2025	p.p.
<b>BASQUE COUNTRY</b>	<b>26,346</b>	<b>5.8</b>	<b>46,780</b>	<b>13.3</b>	<b>1.78</b>	<b>1.66</b>	<b>43.1</b>	<b>4.0</b>
State origin	9,458	9.3	17,889	23.8	1.89	1.67	-	-
Foreign origin	16,888	4.0	28,891	7.6	1.71	1.65	-	-
<b>Araba/Álava</b>	<b>1,125</b>	<b>328.9</b>	<b>1,658</b>	<b>256.0</b>	<b>1.47</b>	<b>1.77</b>	<b>32.3</b>	<b>23.0</b>
State origin	942	288.3	1,431	220.9	1.52	1.84	-	-
Foreign origin	183	828.1	227	1,051.3	1.24	1.00	-	-
<b>Bizkaia</b>	<b>15,584</b>	<b>26.3</b>	<b>29,133</b>	<b>44.6</b>	<b>1.87</b>	<b>1.63</b>	<b>51.7</b>	<b>14.6</b>
State origin	5,596	20.4	11,330	54.0	2.02	1.58	-	-
Foreign origin	9,988	29.8	17,802	39.1	1.78	1.66	-	-
<b>Gipuzkoa</b>	<b>9,637</b>	<b>-21.6</b>	<b>15,989</b>	<b>-22.7</b>	<b>1.66</b>	<b>1.68</b>	<b>34.0</b>	<b>-10.8</b>
State origin	2,920	-22.3	5,127	-22.9	1.76	1.77	-	-
Foreign origin	6,717	-21.2	10,862	-22.6	1.62	1.65	-	-

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 21, 2025

Source: Eustat Tourist accommodating establishments survey

In September 2025, the average length of stay in tourist hostels in the Basque Country stood at 1.78 days, and the bed occupancy rate reached 43.1%, following a year-on-year increase of 4.0 percentage points.

### **Cumulative data (January-September 2025)**

For 2025 to date, **rural accommodation** in the Basque Country attained 144,190 visitors and 388,802 overnight stays; 5.0% and 5.3% more than those obtained for the same cumulative period of 2024. The average stay stood at 2.70 days, similar to the 2.69 days of the previous year. The bed occupancy rate reached 34.5%, compared to the 32.3% obtained in the same cumulative period of 2024. The room occupancy rate also exceeded the 37.1% obtained in 2024, standing at 39.7% for these nine months of 2025.

As regards **tourist apartments**, in the cumulative period until September, visitor numbers reached 220,342, resulting in 643,449 overnight stays; this was an increase in respect of the same period of 2024 of 32.6% in the case of visitor numbers and 16.8% in that of overnight stays. The average stay was 2.92 days in these nine months of 2025, compared to the 3.32 days observed in the same period of 2024. The bed occupancy rate stood at 41.2%, one tenth below the figure achieved in the same period of 2024. The apartment occupancy rate, however, reached 72.2%, 5.6 percentage points above that obtained in the equivalent period of 2024.

Referring to **tourist hostels**, in 2025 to date they have accumulated 212,710 visitors and 384,347 overnight stays, following increases of 3.0% in the case of visitor numbers and 2.0% in that of overnight stays, compared to the same months of 2024. The average stay was 1.81 days, slightly below the 1.82 days recorded the previous year. Lastly, the bed occupancy rate was 42.1%, 0.1 percentage points lower than that obtained during the same cumulative period of 2024.

### **Balance for summer 2025**

During the three summer months as a whole (July, August and September 2025), overnight stays in **rural accommodation** in the Basque Country increased by 4.0% compared to summer of the previous year, while visitor numbers were up 2.3%.

At provincial level, overnight stays rose by 0.8% in Gipuzkoa, 2.6% in Bizkaia and 18.7% in Álava. Meanwhile, the number of visitors this summer increased by 13.9% in Álava and 4.9% in Bizkaia, while in Gipuzkoa it fell by 3.0% compared to the summer months of 2024.

## **Visitors, overnight stays, average length of stay and bed occupancy rates in rural tourism establishments in the Basque Country. Summer(\*). 2025**

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
							by seats		by rooms	
	2025	2025/2024 (%)	2025	2025/2024 (%)	2025	2024	2025	p.p.	2025	p.p.
<b>BASQUE COUNTRY</b>	<b>68,757</b>	<b>2.3</b>	<b>220,937</b>	<b>4.0</b>	<b>3.21</b>	<b>3.16</b>	<b>52.0</b>	<b>2.1</b>	<b>58.0</b>	<b>2.2</b>
State origin	46,520	0.1	153,837	-0.5	3.31	3.33	-	-	-	-
Foreign origin	22,237	7.5	67,100	16.0	3.02	2.80	-	-	-	-
<b>Araba/Álava</b>	<b>12,867</b>	<b>13.9</b>	<b>36,675</b>	<b>18.7</b>	<b>2.85</b>	<b>2.74</b>	<b>38.1</b>	<b>7.1</b>	<b>43.5</b>	<b>6.3</b>
State origin	9,299	11.5	27,273	19.2	2.93	2.74	-	-	-	-
Foreign origin	3,568	20.7	9,402	17.2	2.64	2.71	-	-	-	-
<b>Bizkaia</b>	<b>22,475</b>	<b>4.9</b>	<b>66,884</b>	<b>2.6</b>	<b>2.98</b>	<b>3.04</b>	<b>54.1</b>	<b>1.9</b>	<b>59.3</b>	<b>1.3</b>
State origin	14,349	-2.6	45,981	-2.3	3.20	3.19	-	-	-	-
Foreign origin	8,126	21.2	20,903	15.0	2.57	2.71	-	-	-	-
<b>Gipuzkoa</b>	<b>33,415</b>	<b>-3.0</b>	<b>117,378</b>	<b>0.8</b>	<b>3.51</b>	<b>3.38</b>	<b>57.3</b>	<b>-0.5</b>	<b>64.1</b>	<b>0.7</b>
State origin	22,872	-2.4	80,583	-4.9	3.52	3.62	-	-	-	-
Foreign origin	10,543	-4.4	36,795	16.2	3.49	2.87	-	-	-	-

(\*)Months of July, August and September

p.p.= difference in percentage points with the equivalent period of the previous year

Date October 21, 2025

Source: Eustat Tourist accommodating establishments survey

The average length of stay remained at 3.21 days, slightly exceeding the 3.16 days seen in summer 2024. It is worth highlighting that the average length of stay in Gipuzkoa was 3.51 days, followed by 2.98 days in Bizkaia and 2.85 days in Álava.

Occupancy rates in this type of accommodation for the Basque Country as a whole were 52.0% in the case of beds and 58.0% in that of rooms, an improvement of 2.1 percentage points in the case of beds and an increase of 2.2 percentage points in the case of rooms.

With regard to **tourist apartments** in the Basque Country, the number of visitors rose to 98,494 during summer 2025, following an increase of 26.2% compared to the previous summer. Meanwhile, the number of overnight stays stood at 279,588, 15.2% more than in summer 2024.

At provincial level, of particular note was the 33.8% rise in visitor numbers and the 20.4% rise in overnight stays in Bizkaia. Gipuzkoa posted increases of 18.6% and 11.9% with respect to the same variables and, lastly, in Álava, there was a 19.0% drop in the number of visitors, which meant a 5.9% rise in overnight stays.

## Visitors, overnight stays, average length of stay and bed occupancy rates in tourist apartments of the Basque Country. Summer(\*). 2025

	Visitors		Overnight stays		Average stay		Occupancy rates (%)			
							by seats		by rooms	
	2025	2025/2024 (%)	2025	2025/2024 (%)	2025	2024	2025	p.p.	2025	p.p.
<b>BASQUE COUNTRY</b>	<b>98,494</b>	<b>26.2</b>	<b>279,588</b>	<b>15.2</b>	<b>2.84</b>	<b>3.11</b>	<b>50.1</b>	<b>-1.2</b>	<b>82.2</b>	<b>10.8</b>
State origin	49,403	18.2	146,993	9.1	2.98	3.22	-	-	-	-
Foreign origin	49,090	35.5	132,595	22.8	2.70	2.98	-	-	-	-
<b>Araba/Álava</b>	<b>3,172</b>	<b>-19.0</b>	<b>34,010</b>	<b>5.9</b>	<b>10.72</b>	<b>8.20</b>	<b>32.9</b>	<b>-0.7</b>	<b>74.2</b>	<b>-8.6</b>
State origin	2,418	-20.5	24,244	4.7	10.03	7.61	-	-	-	-
Foreign origin	754	-13.5	9,767	8.9	12.95	10.29	-	-	-	-
<b>Bizkaia</b>	<b>65,574</b>	<b>33.8</b>	<b>141,531</b>	<b>20.4</b>	<b>2.16</b>	<b>2.40</b>	<b>51.6</b>	<b>-4.5</b>	<b>81.9</b>	<b>14.8</b>
State origin	32,275	23.6	69,062	10.9	2.14	2.38	-	-	-	-
Foreign origin	33,300	45.4	72,470	31.1	2.18	2.41	-	-	-	-
<b>Gipuzkoa</b>	<b>29,747</b>	<b>18.6</b>	<b>104,046</b>	<b>11.9</b>	<b>3.50</b>	<b>3.71</b>	<b>57.7</b>	<b>2.2</b>	<b>85.7</b>	<b>14.3</b>
State origin	14,711	16.5	53,687	9.0	3.65	3.90	-	-	-	-
Foreign origin	15,036	20.8	50,358	15.2	3.35	3.51	-	-	-	-

(\*)Months of July, August and September

p.p.= difference in percentage points with the equivalent period of the previous year

Date October 21, 2025

Source: Eustat Tourist accommodating establishments survey

The average length of stay was 2.84 days for the three summer months of 2025 as a whole, compared to the 3.11 days observed in the same period of 2024.

The occupancy rate for the Basque Country as a whole in summer 2025 stood at 50.1% in terms of beds, with a decrease of 1.2 percentage points in respect of 2024, and 82.2% in terms of apartments, a rise of 10.8 percentage points in year-on-year terms.

During the summer months of 2025, the number of visitors in **tourist hostels** in the Basque Country reached 99,842, which led to a total of 185,211 overnight stays. The increase in relation to the previous summer reached 3.4% in the case of visitor numbers and 6.0% in that of overnight stays.

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

	Visitors		Overnight stays		Average stay		Occupancy rates (%)	
							by seats	
	2025	2025/2024 (%)	2025	2025/2024 (%)	2025	2024	2025	p.p.
<b>BASQUE COUNTRY</b>	<b>99,842</b>	<b>3.4</b>	<b>185,211</b>	<b>6.0</b>	<b>1.86</b>	<b>1.81</b>	<b>55.8</b>	<b>1.8</b>
State origin	36,202	8.1	76,256	22.2	2.11	1.86	-	-
Foreign origin	63,640	1.0	108,954	-3.0	1.71	1.78	-	-
<b>Araba/Álava</b>	<b>4,797</b>	<b>236.9</b>	<b>7,533</b>	<b>156.1</b>	<b>1.57</b>	<b>2.07</b>	<b>47.9</b>	<b>28.5</b>
State origin	3,387	155.7	5,842	110.9	1.72	2.09	-	-
Foreign origin	1,410	1,321.9	1,691	885.7	1.20	1.73	-	-
<b>Bizkaia</b>	<b>54,640</b>	<b>2.9</b>	<b>105,450</b>	<b>11.6</b>	<b>1.93</b>	<b>1.78</b>	<b>61.5</b>	<b>4.9</b>
State origin	20,457	4.2	44,962	34.6	2.20	1.70	-	-
Foreign origin	34,184	2.1	60,489	-0.9	1.77	1.82	-	-
<b>Gipuzkoa</b>	<b>40,405</b>	<b>-3.8</b>	<b>72,227</b>	<b>-6.6</b>	<b>1.79</b>	<b>1.84</b>	<b>49.9</b>	<b>-4.9</b>
State origin	12,359	-1.4	25,453	-3.0	2.06	2.09	-	-
Foreign origin	28,046	-4.8	46,775	-8.5	1.67	1.74	-	-

(\*)Months of July, August and September

p.p.= difference in percentage points with the equivalent period of the previous year

Date October 21, 2025

Source: Eustat Tourist accommodating establishments survey

### Note:

The response rate for the Survey on Tourist Establishments this month was **89.4%** for Rural Accommodation, **89.1%** for Tourist Apartments and **86.8%** for Tourist Hostels. Eustat would like to thank all establishments that participated in this survey for their effort.

### For further information:

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