

SURVEY ON TOURIST ESTABLISHMENTS. Hotels. October 2025

In October 2025, overnight stays at hotel establishments in the Basque Country were up 4.8% in year-on-year terms

The room occupancy rate of hotels reached 76.6% and the ADR (average daily rate stood at €124.50

In **October 2025**, visitor numbers at hotel establishments in the Basque Country increased by 5.1% in year-on-year terms and overnight stays were up 4.8%, according to Eustat data. The 362,433 recorded visitors gave rise to a total of 716,818 overnight stays.

Foreign tourists accounted for 49.4% of visitors and 52.1% of overnight stays, following year-on-year increases of 4.4% in the case of visitors and 7.7% in that of overnight stays.

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

	Visitors		Overnight stays		Average stay	
	10/2025	m/m-12 (%)	10/2025	m/m-12 (%)	10/2025	10/2024
BASQUE COUNTRY	362,433	5.1	716,818	4.8	1.98	1.98
State origin	183,213	5.9	343,282	1.9	1.87	1.95
Foreign origin	179,220	4.4	373,536	7.7	2.08	2.02
Araba/Álava	45,835	-1.6	100,194	6.8	2.19	2.01
State origin	30,644	-1.2	63,469	0.8	2.07	2.03
Foreign origin	15,191	-2.5	36,725	19.0	2.42	1.98
Vitoria-Gasteiz	32,919	-5.7	78,392	7.1	2.38	2.10
Bizkaia	168,740	10.9	322,192	8.6	1.91	1.95
State origin	87,819	11.3	158,208	6.4	1.80	1.89
Foreign origin	80,921	10.5	163,984	10.8	2.03	2.02
Bilbao	114,576	13.7	224,979	10.3	1.96	2.02
Gipuzkoa	147,858	1.3	294,432	0.5	1.99	2.01
State origin	64,750	2.6	121,605	-2.8	1.88	1.98
Foreign origin	83,108	0.2	172,827	2.9	2.08	2.03
Donostia / San Sebastian	95,857	-2.9	200,604	0.2	2.09	2.03

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 November 20, 2025

Source: Eustat Tourist accommodating establishments survey

Álava recorded 45,835 visitors and 100,194 overnight stays, which represented a year-on-year drop in visitors of 1.6% although an increase of 6.8% in overnights stays. In the case of Gipuzkoa, visitor numbers were up 1.3% and overnight stays rose up 0.5%, with 147,858 visitors and 294,432 overnight stays. In Bizkaia, 168,740 visitors were recorded in October 2025 (10.9% more than in October 2024) and there were 322,192 overnight stays (up 8.6% on the same month of the previous year).

By provincial capital, visitor numbers fell by 5.7% in Vitoria-Gasteiz and 2.9% in San Sebastián, whereas in Bilbao they rose by 13.7%. In the case of overnight stays, compared to October of the previous year, they rose by 0.2% in San Sebastián, 7.1% in Vitoria-Gasteiz and 10.3% in Bilbao.

The average length of stay in hotel establishments in the Basque Country during October 2025 was 1.98 days, identical to that observed in the same month of the previous year¹.

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

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	10/2025	p.p. *	10/2025	p.p. *	10/2025	m/m-12 (%)	10/2025	m/m-12 (%)
BASQUE COUNTRY	62.1	1.9	76.6	1.5	124.53	7.9	95.41	10.0
Araba/Álava	58.8	3.2	79.9	6.4	99.98	9.9	79.84	19.5
Vitoria-Gasteiz	58.9	3.3	84.1	7.4	85.03	17.9	71.55	29.2
Bizkaia	62.1	3.4	76.7	1.3	122.74	6.1	94.15	7.9
Bilbao	68.5	4.0	84.1	0.7	137.70	6.5	115.74	7.4
Gipuzkoa	63.2	-0.2	75.4	-0.1	135.51	9.7	102.17	9.6
Donostia / San Sebastian	72.4	1.5	83.6	0.8	162.41	10.7	135.74	11.7

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 November 20, 2025

Source: Eustat Tourist accommodating establishments survey

The occupancy rate for the Basque Country as a whole in October stood at 62.1% in the case of beds and 76.6% in that of rooms. Compared to October 2024, this meant increases of 1.9 and 1.5 percentage points, respectively.

The average daily rate (applied to a double room with a bathroom offered as room only accommodation), or ADR was 124.5 euros in October 2025 in the Basque Country, which was a rise of 7.9% in respect of the previous October. The ADR stood at 135.5 euros in Gipuzkoa, 122.7 euros in Bizkaia and 100.0 euros in Álava. The differences were even greater by provincial capital, given that the ADR reached 162.4 euros in San Sebastián, 137.7 euros in Bilbao and, lastly, it stood at 85.0 euros in Vitoria-Gasteiz.

The RevPar, or average revenue per available room, was 95.4 euros in hotel establishments in the Basque Country in October 2025, 10.0% higher than that obtained in the same month of the previous year.

Annual cumulative total

In the cumulative period for the year to date (**January- October 2025**), compared to the same cumulative period of the previous year, visitor numbers rose by 3.5%, and overnight stays were up 4.0%. The average length of stay during these ten months was 2.00 days in 2025, very similar to the 1.99 days observed during 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 ten months of the year stood at 60.6% in the case of beds and 72.1% in that of rooms, 0.7 and 0.8 percentage points more, respectively, than in the same cumulative period of the previous year.

Note:

The response rate for the ETR for Hotels in October 2025 was **91.4%**. 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:**

Eustat - Euskal Estatistika Erakundea/Basque Statistics Institute
C/ Donostia-San Sebastián, 1 01010 Vitoria-Gasteiz
Press Service: servicioprensa@eustat.eus Tel.: 945 01 75 62