

# Hotels in the Basque Country: visitors, overnight stays, occupancy rates and profitability.

## December 2025

### **Highlights**

#### 2025

**Visitors:** the Basque Country recorded 3,896,837 visitors, an increase of 3.5% compared to 2024.

**Overnight stays:** the number of overnight stays rose to 7,727,069, up 3.6% on 2024.

**Average length of stay<sup>1</sup>:** 1.98 days, the same as in 2024.

**Room occupancy rate:** 69.8%, 0.8 points higher than in 2024.

**Profitability:** the ADR (average daily rate per room) stood at 120.4 euros and the RevPar (average daily revenue per room) was 84.0 euros, up 5.6% and 6.9% on 2024.

#### December 2025

**Visitors:** the Basque Country recorded 257,307 visitors, 5.9% more than in December 2024.

**Overnight stays:** the number of overnight stays rose to 476,356, up 1.7% on December 2024.

**Average length of stay:** 1.85 days, below the 1.93 days recorded in December of the previous year.

**Room occupancy rate:** 52.8%, 0.6 points higher than in December 2024.

**Profitability:** the ADR (average daily rate per room) stood at 91.9 euros and the RevPar (average daily revenue per room) was 48.5 euros, up 5.5% and 6.7% on December 2024.

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<sup>1</sup> Number of days, on average, that customers remain in each of the establishments where they stay overnight. This does not refer to the total length of their stay in the Basque Country.

## Statistical analysis

### 2025

In 2025, visitor numbers and overnight stays at hotel establishments in the Basque Country rose by 3.5% and 3.6%, respectively, resulting in 3,896,837 visitors and 7,727,069 overnight stays, according to Eustat data.

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

	Visitors		Overnight stays		Average stay	
	2025	p/p-1 (%)	2025	p/p-1 (%)	2025	2024
<b>BASQUE COUNTRY</b>	<b>3,896,837</b>	<b>3.5</b>	<b>7,727,069</b>	<b>3.6</b>	<b>1.98</b>	<b>1.98</b>
State origin	2,029,247	1.5	3,908,373	0.4	1.93	1.95
Foreign origin	1,867,590	5.8	3,818,696	7.2	2.04	2.02
<b>Araba/Álava</b>	<b>511,882</b>	<b>-2.7</b>	<b>1,096,472</b>	<b>1.9</b>	<b>2.14</b>	<b>2.05</b>
State origin	352,369	-2.6	740,754	-0.2	2.10	2.05
Foreign origin	159,513	-2.9	355,718	6.5	2.23	2.03
Vitoria-Gasteiz	387,954	-4.7	880,219	0.8	2.27	2.14
<b>Bizkaia</b>	<b>1,791,639</b>	<b>7.6</b>	<b>3,427,735</b>	<b>6.4</b>	<b>1.91</b>	<b>1.93</b>
State origin	943,415	4.9	1,727,071	2.5	1.83	1.87
Foreign origin	848,224	10.7	1,700,664	10.7	2.00	2.01
Bilbao	1,233,349	9.3	2,382,586	7.8	1.93	1.96
<b>Gipuzkoa</b>	<b>1,593,316</b>	<b>1.3</b>	<b>3,202,862</b>	<b>1.3</b>	<b>2.01</b>	<b>2.01</b>
State origin	733,463	-0.5	1,440,548	-1.9	1.96	1.99
Foreign origin	859,853	3.0	1,762,314	4.1	2.05	2.03
Donostia / San Sebastián	1,019,260	-1.0	2,122,612	-0.5	2.08	2.07

p/p-1 Year-on-year rate of change in the last observed period (p) with respect to the same period of the previous year (p-1)

Date January 22, 2026

Source: Eustat Tourist accommodating establishments survey

Over the course of 2025, Álava recorded a total of 511,882 visitors (13.1% of the total number registered in the Basque Country), giving rise to 1,096,472 overnight stays (14.2% of the total). Bizkaia accounted for 46.0% of visitor numbers (1,791,639) and 44.4% of overnight stays (3,427,735). Lastly, Gipuzkoa accounted for 40.9% of visitors, contributing 1,593,316 to the total, and 3,202,862 overnight stays, representing 41.4% of the total.

These figures translate into year-on-year increases in visitor numbers of 7.6% in Bizkaia and 1.3% in Gipuzkoa, while in Álava they represent a decrease of 2.7% compared to 2024 as a whole. In 2025, overnight stays performed positively in all three provinces, with increases in respect of the previous year of 6.4% in Bizkaia, 1.9% in Álava and 1.3% in Gipuzkoa.

The number of visitors from abroad in 2025 was 5.8% higher than that recorded in 2024. In the case of overnight stays, the increase was even greater, with annual growth reaching 7.2%.

By provincial capital, visitor numbers in Vitoria-Gasteiz and San Sebastián fell by 4.7% and 1.0%, respectively, in year-on-year terms, while in Bilbao they rose by 9.3%. Overnight stays were down 0.5% in San Sebastián, but up 0.8% in Vitoria-Gasteiz and 7.8% in Bilbao.

The average length of stay in 2025 was 1.98 days in the Basque Country as a whole, identical to that observed in the previous year. In the case of Álava, this figure stood at 2.14 days compared to 2.05 in 2024. In Bizkaia, it was 1.91 days, very similar to the 1.93 days obtained in 2024 and, lastly, in Gipuzkoa, it stood at 2.01 days, the same figure as the previous year.

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

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	2025	p.p.*	2025	p.p.*	2025	p/p-1 (%)	2025	p/p-1 (%)
<b>BASQUE COUNTRY</b>	<b>58.3</b>	<b>0.6</b>	<b>69.8</b>	<b>0.8</b>	<b>120.38</b>	<b>5.6</b>	<b>84.02</b>	<b>6.9</b>
<b>Araba/Álava</b>	<b>55.5</b>	<b>0.4</b>	<b>72.6</b>	<b>3.8</b>	<b>91.09</b>	<b>6.7</b>	<b>66.09</b>	<b>12.6</b>
Vitoria-Gasteiz	56.6	0.2	77.2	4.3	78.88	9.8	60.86	16.2
<b>Bizkaia</b>	<b>57.5</b>	<b>1.9</b>	<b>69.3</b>	<b>1.1</b>	<b>112.52</b>	<b>4.2</b>	<b>77.96</b>	<b>5.9</b>
Bilbao	62.5	1.2	74.5	0.1	122.93	4.2	91.60	4.3
<b>Gipuzkoa</b>	<b>60.3</b>	<b>-0.7</b>	<b>69.4</b>	<b>-0.5</b>	<b>140.07</b>	<b>7.3</b>	<b>97.22</b>	<b>6.5</b>
Donostia / San Sebastian	65.6	-0.2	73.7	-0.6	168.62	8.7	124.19	7.8

p/p-1 Year-on-year rate of change in the last observed period (p) with respect to the same period of the previous year (p-1)

p.p.\*=difference in percentage points of the previous year

Date January 22, 2026

Source: Eustat Tourist accommodating establishments survey

In 2025, occupancy rates at hotel establishments for the Basque Country as a whole were 58.3% in the case of beds and 69.8% in that of rooms. Compared to 2024, the bed occupancy rate increased by 0.6 percentage points, while the room occupancy rate rose by 0.8 points.

With regard to profitability indicators, 2025 closed with an ADR of 120.4 euros for the Basque Country as a whole and a RevPar of 84.0 euros, 5.6% and 6.9% more than the previous year, respectively.

### December 2025

Focusing the analysis on **December 2025**, visitor numbers at hotel establishments in the Basque Country increased by 5.9% and overnight stays were up 1.7% in year-on-year terms (December 2025 compared to December 2024). The total number of visitors, which rose to 257,307, led to a total of 476,356 overnight stays.

Foreign visitors accounted for 35.2% of the total number of visitors and 37.3% of overnight stays in December 2025, higher percentages to those recorded in December 2024, when visitors and overnight stays from abroad represented 34.0% and 35.0%, respectively. The number of visitors and overnight stays from abroad increased in year-on-year terms by 9.6% and 8.4%, respectively.

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

	Visitors		Overnight stays		Average stay	
	12/2025	m/m-12 (%)	12/2025	m/m-12 (%)	12/2025	12/2024
<b>BASQUE COUNTRY</b>	<b>257,307</b>	<b>5.9</b>	<b>476,356</b>	<b>1.7</b>	<b>1.85</b>	<b>1.93</b>
State origin	166,766	4.0	298,577	-1.9	1.79	1.90
Foreign origin	90,541	9.6	177,779	8.4	1.96	1.99
<b>Araba/Álava</b>	<b>37,854</b>	<b>3.5</b>	<b>78,953</b>	<b>1.5</b>	<b>2.09</b>	<b>2.13</b>
State origin	29,810	4.1	57,120	-4.0	1.92	2.08
Foreign origin	8,044	1.6	21,833	19.7	2.71	2.30
Vitoria-Gasteiz	29,617	-0.4	64,834	-2.3	2.19	2.23
<b>Bizkaia</b>	<b>115,458</b>	<b>6.0</b>	<b>209,278</b>	<b>0.4</b>	<b>1.81</b>	<b>1.91</b>
State origin	78,418	3.2	134,708	-2.8	1.72	1.82
Foreign origin	37,040	12.5	74,570	6.7	2.01	2.12
Bilbao	85,787	7.9	155,193	0.8	1.81	1.94
<b>Gipuzkoa</b>	<b>103,995</b>	<b>6.7</b>	<b>188,125</b>	<b>3.4</b>	<b>1.81</b>	<b>1.87</b>
State origin	58,538	5.0	106,749	0.6	1.82	1.90
Foreign origin	45,457	8.9	81,376	7.2	1.79	1.82
Donostia / San Sebastián	71,820	6.6	133,902	6.2	1.86	1.87

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 January 22, 2026

Source: Eustat Tourist accommodating establishments survey

In Álava, there were 37,854 visitors and 78,953 overnight stays, 3.5% and 1.5% more than in December the previous year. In Bizkaia, there was an increase of 6.0% in the case of visitors and 0.4% in that of overnight stays, with a total of 115,458 visitors and 209,278 overnight stays. In Gipuzkoa, 103,995 visitors were recorded in the last month of 2025 (6.7% more than in December 2024) and there were 188,125 overnight stays (3.4% more than the same month of the previous year).

By provincial capital, visitor numbers fell by 0.4% in Vitoria-Gasteiz, but were up in both Bilbao (7.9%) and San Sebastián (6.6%). Compared to December of the previous year, the number of overnight stays decreased by 2.3% in Vitoria-Gasteiz, but rose by 0.8% in Bilbao and 6.2% in San Sebastián.

The average length of stay in December 2025 was 1.85 days in the Basque Country as a whole, below that obtained in the same month of 2024, which was 1.93 days.

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

	Occupancy rates (%)				Profitability			
	by seats		by rooms		ADR (euros)		RevPAR (euros)	
	12/2025	p.p. *	12/2025	p.p. *	12/2025	m/m-12 (%)	12/2025	m/m-12 (%)
<b>BASQUE COUNTRY</b>	<b>44.4</b>	<b>0.4</b>	<b>52.8</b>	<b>0.6</b>	<b>91.87</b>	<b>5.5</b>	<b>48.47</b>	<b>6.7</b>
<b>Araba/Álava</b>	<b>45.9</b>	<b>-1.7</b>	<b>59.5</b>	<b>-0.4</b>	<b>81.68</b>	<b>7.5</b>	<b>48.59</b>	<b>6.8</b>
Vitoria-Gasteiz	49.2	-1.4	65.7	0.2	75.52	9.0	49.58	9.3
<b>Bizkaia</b>	<b>42.8</b>	<b>-0.3</b>	<b>51.2</b>	<b>0.2</b>	<b>94.47</b>	<b>6.8</b>	<b>48.35</b>	<b>7.2</b>
Bilbao	47.9	-1.0	56.7	0.1	99.59	8.1	56.42	8.2
<b>Gipuzkoa</b>	<b>45.6</b>	<b>1.9</b>	<b>52.0</b>	<b>1.4</b>	<b>93.39</b>	<b>3.3</b>	<b>48.57</b>	<b>6.0</b>
Donostia / San Sebastián	50.6	3.8	56.0	4.0	101.08	-0.2	56.63	7.6

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 January 22, 2026

Source: Eustat Tourist Accommodating Establishments Survey

The occupancy rate in December 2025 for the Basque Country as a whole was 44.4% in the case of beds and 52.8% in that of rooms. Compared to December 2024, the bed occupancy rate increased by 0.4 percentage points and the room occupancy rate rose by 0.6 points.

Profitability, measured using the ADR or average daily rate, reached 91.9 euros in December 2025 in the Basque Country as a whole, which was a rise of 5.5% compared to December of the previous year. In the case of Bizkaia, the ADR reached 94.5 euros, in Gipuzkoa it was 93.4 euros and in Álava it stood at 81.7 euros. By provincial capital, the differences were similar, given that the ADR was 101.1 euros in San Sebastián, 99.6 euros in Bilbao and, lastly, 75.5 euros in Vitoria-Gasteiz. The RevPar, or average revenue per available room, was 48.5 euros in the Basque Country in December 2025, 6.7% higher than in the same month of the previous year.

### Note:

The coverage of the ETR for Hotels in December 2025 was **81.1%**. 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\*\*](#)

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