vinetur

Spain’s hotel prices rose 7.4% in October, outpacing growth in overnight stays

Overnight stays increased 1.6%, occupancy slipped slightly, leaving higher room rates to drive revenue growth for hotel operators

Monday, November 23, 2026

Hotel prices in Spain rose 7.4% in October from a year earlier, while overnight stays increased 1.6%, a gap that points to stronger growth in room revenue than in guest volumes across the hospitality sector, according to provisional data released by Spain’s National Statistics Institute, or INE, on Monday, November 23.

The October figures showed that pricing continued to outpace demand even as both indicators slowed from September. The annual increase in the Hotel Price Index was 1.9 points lower than in September, the INE said. The annual rise in overnight stays was also weaker, down 0.3 points from the previous month.

For hotel operators, the main signal was that rate growth remained firm. The INE said the average daily room rate in October was 109.07 euros, up 7.4% from October 2025. In the summary accompanying the release, the statistics office also said billing per occupied room reached 130.4 euros, a 7.9% annual increase. Taken together, those figures indicate that unit revenue kept improving faster than overall room demand.

Total hotel overnight stays rose 1.6% from October 2025. The increase was concentrated in mid-range properties, with two-star and three-star hotels posting the strongest gains, according to the INE. Overnight stays at five-star hotels fell slightly.

Demand patterns also split between domestic and international travelers. Overnight stays by residents of Spain rose 3.2% in October, while stays by foreign visitors fell 0.6%. That mix matters for hotels because a stronger domestic market can support occupancy in many regions, but a drop in international demand can weigh on destinations that depend more heavily on overseas travelers.

The regional picture was uneven. The largest increases in overnight stays were recorded in Castilla-La Mancha, the Basque Country and the Canary Islands, the INE said. The sharpest declines were in Melilla, La Rioja and Castilla y León.

Occupancy figures suggested that demand growth was not strong enough to lift utilization. The occupancy rate by bed places stood at 48.4% in October, slightly below the level a year earlier. Room occupancy reached 62.2%, also down modestly on an annual basis.

The October data therefore showed a hotel market that was still able to raise prices at a solid pace even as growth in stays eased and occupancy softened. For hospitality businesses, that means revenue performance depended more on pricing and room yield than on a broad-based increase in the number of nights sold. The INE classified the October figures as provisional.