



GSRANALYTIX

TOURISM

& HOSPITALITY MAGAZINE

TRAVEL • HOTELS • DESTINATIONS

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SPAIN EDITION

02



SPAIN

BEYOND THE POSTCARD

CULTURE • COASTS • CUISINE • LIVING CITIES

ES

EUROPE

COUNTRY PROFILE
ONE COUNTRY. MANY JOURNEYS

COUNTRY TOURISM OVERVIEW

A tourism superpower with regional depth
Spain combines global recognition with a remarkably broad product mix. Monumental cities, Atlantic and Mediterranean coasts, island resorts, gastronomy, art, wine, nature and year-round urban life allow the country to serve leisure, cultural, premium, meetings and long-stay demand at exceptional scale.


QUICK PROFILE
CAPITAL

Madrid

LANGUAGE

Spanish; strong regional languages

CURRENCY

Euro (EUR)

REGION

Southwestern Europe

CLIMATE

Mediterranean to Atlantic and alpine

CORE POSITION

Europe's most complete tourism portfolio

THE TOURISM PROPOSITION
01 YEAR-ROUND DIVERSITY

Cities, islands, beaches, heritage, nature, gastronomy and events reduce dependence on a single product or season.

02 GLOBAL ACCESS

Madrid and Barcelona anchor a dense airport and rail network, while regional gateways distribute visitors across the country.

03 CULTURAL CAPITAL

World-class museums, historic cities, architecture, festivals and 50 UNESCO World Heritage properties create enduring demand.

04 VALUE TO LUXURY

Spain spans accessible city breaks and family resorts through to design hotels, private villas, fine dining and curated experiences.

VERY HIGH
SCALE
VERY HIGH
PRODUCT DEPTH
MEDIUM
SEASONALITY
MATURE
INVESTMENT BASE

COMPETITIVE STRENGTHS

A DESTINATION BUILT FOR REPEAT VISITS

WHY SPAIN

Recognition is only the beginning. Spain's advantage is the ability to convert familiarity into repeat travel. Visitors can return for entirely different journeys - art cities, islands, gastronomy, hiking, festivals, wellness, golf, rail circuits or premium coastal stays - supported by a mature visitor economy.



01 GLOBAL BRAND POWER

Spain is immediately understood in major source markets, lowering destination education costs and helping new products launch under a trusted national umbrella.

02 EXCEPTIONAL PRODUCT RANGE

The same itinerary can combine Madrid, Barcelona, Andalusia, Basque gastronomy, Mediterranean islands and Atlantic landscapes.

03 HOSPITALITY KNOW-HOW

Deep expertise spans hotels, resorts, restaurants, events, destination management, transport, design and experience creation.

04 CONNECTIVITY AT SCALE

Large international gateways, regional airports, high-speed rail and strong road infrastructure make multi-stop travel practical.

05 CUISINE AS A DRIVER

Tapas culture, regional kitchens, seafood, wine routes, food markets and acclaimed restaurants turn dining into a reason to travel.

06 HERITAGE WITH LIVING ENERGY

Historic fabric is paired with contemporary culture, festivals, neighbourhood life and creative industries rather than presented as a static museum.

GSR PERSPECTIVE

Spain's next advantage will come from distributing value more evenly: across seasons, neighbourhoods, inland regions and smaller cities, while protecting the quality of life that makes the destination attractive.

DESTINATION PORTFOLIO
HIGH-RECOGNITION ANCHORS

ICONIC DESTINATIONS I


01 MADRID

A high-energy capital of museums, royal heritage, gastronomy, nightlife and business travel, with excellent rail access to the rest of Spain.

02 BARCELONA

Architecture, design, beaches, events and cruise connectivity create a rare city-and-sea proposition with worldwide recognition.

03 SEVILLE

Andalusian heritage, flamenco, monumental architecture, cuisine and riverfront life make Seville one of Europe's most atmospheric city breaks.

04 GRANADA

The Alhambra, Albaicin, university energy and access to the Sierra Nevada combine heritage, culture and nature in a compact destination.

05 SAN SEBASTIAN

La Concha Bay, pintxos, Michelin-level gastronomy and Basque identity position the city as a premium culinary and coastal escape.

06 MALLORCA

Beaches, villages, mountains, cycling, marinas and luxury hotels support family, active, wellness and high-end leisure demand.

DESTINATION PORTFOLIO
REGIONAL DEPTH AND NEW CIRCUITS

ICONIC DESTINATIONS II


01 VALENCIA

A Mediterranean city combining architecture, beaches, paella culture, major events and a growing reputation for design and urban quality.

02 BILBAO & BASQUE COUNTRY

Contemporary culture, industrial renewal, dramatic coastlines and a strong food identity support premium short breaks and touring.

03 SANTIAGO & GALICIA

The Camino de Santiago anchors spiritual and active travel, while Galicia adds seafood, Atlantic scenery, heritage towns and rural stays.

04 CANARY ISLANDS

Year-round climate, volcanic landscapes, beaches and resort infrastructure make the archipelago one of Europe's strongest winter-sun platforms.

05 COSTA DEL SOL

A mature international resort economy with beaches, golf, marinas, branded residences, gastronomy and growing premium-lifestyle demand.

06 TOLEDO & CENTRAL SPAIN

Historic towns, castles, wine landscapes and fast rail links from Madrid create high-potential cultural circuits beyond the capital.

EXPERIENCE ECONOMY
MORE THAN A DESTINATION CHECKLIST

TOURISM EXPERIENCES


01 TAPAS & MARKETS

Food markets, tapas bars, seafood and regional kitchens turn everyday dining into a highly shareable travel experience. Guided tastings, chef-led workshops and neighbourhood routes can convert short visits into deeper local spending.


02 WINE & RURAL ROUTES

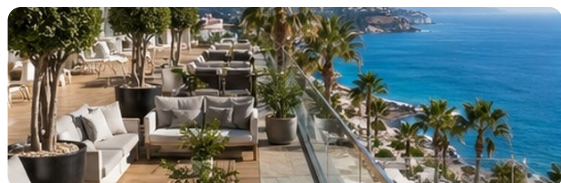
Rioja, Ribera del Duero, Priorat, Jerez and emerging regions connect wineries with landscapes, gastronomy and boutique lodging. Strong packaging can link cellar visits with cycling, heritage towns and seasonal food.


03 ISLAND & COASTAL LIFE

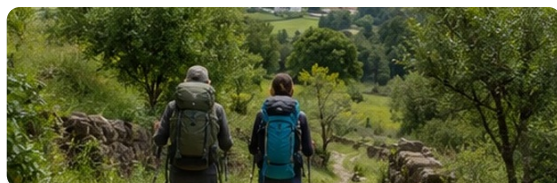
Mediterranean coves and Atlantic beaches support resorts, sailing, diving, wellness and low-density premium stays. The opportunity is to sell distinct island identities and shoulder-season experiences rather than beach capacity alone.


04 VOLCANIC NATURE

The Canary Islands add lava landscapes, stargazing, hiking and year-round outdoor travel to Spain's coastal offer. Protected scenery and mild winters create a strong platform for active, scientific and wellness travel.


05 DESIGN-LED HOSPITALITY

Urban lifestyle hotels, restored heritage properties and sea-view resorts use architecture and service to compete on value, not only price. Public spaces, food concepts and local programming increasingly define the stay.


06 CAMINO & SLOW TRAVEL

Walking routes connect small towns, rural businesses, local food and living heritage while naturally spreading visitor spending. Luggage transfer, accessible stages and curated stays can broaden the market beyond traditional pilgrims.

MARKET INTELLIGENCE
SCALE, VALUE AND MOMENTUM

KEY STATISTICS & MARKET DATA

SPAIN AT TOURISM SCALE

Record demand is increasingly measured by value, distribution and destination resilience.

96.8M

INTERNATIONAL TOURISTS

Full-year 2025 record; up from the previous historical high.

+4.6%

ARRIVALS GROWTH

International tourist arrivals in the first half of 2026 versus H1 2025.

EUR 1,393

AVERAGE SPEND PER TOURIST

June 2026; annual increase of 1.1 percent.

EUR 211

AVERAGE DAILY SPEND

June 2026; annual increase of 0.7 percent.

321.6M

AIRPORT PASSENGERS

Passengers handled by Aena's airport network in Spain in 2025.

50

UNESCO WORLD HERITAGE

Cultural, natural and mixed properties on the World Heritage List.

EUR 156.9

HOTEL REVENUE / OCCUPIED ROOM

July 2026 average, 6.8 percent above July 2025.

146.3M

NON-HOTEL OVERNIGHT STAYS

Record total for tourist apartments, campsites, rural stays and hostels in 2025.

HOSPITALITY LANDSCAPE
HOTELS, RESORTS AND LIVING ASSETS

A MATURE MARKET STILL EVOLVING

Spain's hospitality market is both scaled and segmented. International brands, domestic operators, independent hotels, resorts, hostels, rural accommodation, serviced apartments and the Paradores network serve very different demand profiles. The next cycle is increasingly shaped by renovation, operating efficiency, brand conversion and experience-led positioning.


01 URBAN LIFESTYLE

Madrid, Barcelona, Malaga, Valencia, Seville and Bilbao reward concepts that connect design, food, neighbourhood life and flexible public space.

02 RESORT REPOSITIONING

Island and coastal assets can move up the value chain through room upgrades, wellness, gastronomy, energy efficiency and stronger shoulder-season programming.

03 HERITAGE HOSPITALITY

Historic buildings and the Paradores model demonstrate how conservation, local identity and modern operations can create destination value.

04 EXTENDED STAY

Aparthotels, branded residences and serviced living respond to remote work, family travel, winter stays and internationally mobile professionals.

05 RURAL & NATURE

Small-scale lodging linked to walking, cycling, wine, food and protected landscapes can distribute demand beyond congested hotspots.

06 DIGITAL OPERATIONS

Revenue management, direct booking, multilingual service, CRM, energy data and AI-supported workflows are becoming core competitiveness tools.

DEMAND SIGNAL

The United Kingdom, France, Germany and the Netherlands remain central European source markets, while the United States, Latin America and selected Middle Eastern and Asian markets support higher-value and longer-haul growth.

SECTOR CHALLENGES
SUCCESS CREATES ITS OWN PRESSURE

GROWTH MUST PROTECT THE PRODUCT

Spain's challenge is not attracting attention. It is protecting resident acceptance, natural assets and service quality while converting record demand into broader and more durable value.

01 OVERCROWDING

Peak pressure in famous districts, islands and coastal resorts can weaken resident support and visitor satisfaction.

02 HOUSING & SOCIAL LICENCE

Short-term rental growth and affordability concerns require clearer local rules, enforcement and community dialogue.

03 CLIMATE & WATER

Heat, drought, wildfire risk and water stress demand resilient landscaping, efficient systems and seasonal adaptation.

04 WORKFORCE PRESSURE

Housing costs, seasonality and skills gaps can limit service quality; employers need stronger retention and career pathways.

05 INFRASTRUCTURE LOAD

Airports, transport, waste systems and public spaces need capacity aligned with both visitors and residents.

06 REGIONAL IMBALANCE

Iconic hubs absorb demand while inland regions and smaller cities often lack visibility, packaging and distribution.

THE CONTROL TEST

Every growth proposal should answer three questions: Does it improve local value? Can infrastructure carry it? Does it strengthen the destination outside the peak period?

THE NEXT TOURISM MODEL
QUALITY, BALANCE AND LOCAL BENEFIT

FROM VOLUME TO VALUE

BETTER TOURISM, NOT ONLY MORE

Spain Tourism 2030 places greater emphasis on a balanced, inclusive and sustainable model. The commercial opportunity is to turn that direction into products travellers can understand and businesses can measure.

01 SPREAD DEMAND

Build bookable routes across inland cities, northern regions and secondary gateways.

02 EXTEND SEASONS

Use culture, food, events, sport, wellness and remote-work stays beyond summer peaks.

03 RETROFIT THE BASE

Upgrade existing stock for energy, water, accessibility, comfort and operational efficiency.

04 MEASURE IMPACT

Track spend, length of stay, resident sentiment, resource intensity and local supply participation.

05 DIGITISE THE JOURNEY

Connect discovery, booking, mobility, interpretation and service through better data.

06 KEEP VALUE LOCAL

Strengthen regional food, crafts, guides, culture and small businesses inside the visitor economy.

2030 DESTINATION STANDARD

Competitive • Connected • Climate-ready • Community-positive • Measurable

INVESTMENT AND PARTNERSHIPS
A MARKET FOR OPERATORS AND INNOVATORS

INVEST WHERE VALUE COMPOUNDS

Spain offers scale, liquidity and product depth. Invest in Spain reported EUR 1.766 billion of hotel investment in the first half of 2025. The strongest opportunities are not limited to new construction: repositioning, technology, regional circuits, heritage conversion, wellness and climate-ready operations can create value within a mature destination economy.


01 HOTEL REPOSITIONING

Acquire, renovate or convert assets where design, operations, wellness and food can lift rate and seasonality.

02 REGIONAL CIRCUITS

Package smaller cities and rural destinations into bookable rail, road, food, wine and heritage journeys.

03 WELLNESS ECOSYSTEMS

Combine hospitality, thermal assets, preventive health, sport, nutrition and nature-based recovery.

04 DESTINATION TECHNOLOGY

Improve direct distribution, revenue management, visitor flow, multilingual service and resource monitoring.

05 BRANDED & EXTENDED STAY

Serve long-stay, family, remote-work and international lifestyle demand with flexible living formats.

06 LOCAL SUPPLY PLATFORMS

Connect hotels and visitors with regional food, crafts, guides, events and cultural experiences.

PARTNERSHIP FILTER
LOCAL VALUE
CLEAR MARKET
YEAR-ROUND
MEASURABLE

Sources: Invest in Spain tourism sector; hotel investment updates; GSR Analytix opportunity assessment.



GSRANALYTIX

CONNECTING SPAIN'S TOURISM WITH OPPORTUNITY

GSR Analytix connects destination insight, hospitality intelligence, tourism publications and international business visibility with practical market opportunity.

01

MARKET INTELLIGENCE

02

DESTINATION POSITIONING

03

PARTNER DISCOVERY

04

INVESTMENT DIALOGUE



SPAIN EDITION