

High-Impact Tourism and Sustainability in Madrid

Executive Summary



Madrid is writing a new chapter in its positioning as a high-value urban destination. In recent years, a combination of structural, economic, cultural, and urban factors has driven meaningful changes in the tourism and services offerings, in the city's international image, and in how Madrid competes for the higher-spending international travelers.

This destination, with its compact urban model and efficient public transport network, stands out for its human scale and high cultural density: museums, hotels, shopping areas, and restaurants are all within walking distance, facilitating an integrated and efficient experience for high-impact visitors.

Added to this is the Community of Madrid, with three UNESCO World Heritage Cities—Alcalá de Henares, Aranjuez, and San Lorenzo de El Escorial—, the Sierra de Guadarrama National Park, and attractions such as the Madrid Wine Route, which enhance the experience by combining culture, nature, and gastronomy within close proximity.

This report, prepared by Virtuoso exclusively for Madrid Turismo by Ifema Madrid, is groundbreaking in its deep and comprehensive analysis of this evolution and the effects of high-impact international tourism on the sustainability of the city understood in its broadest sense: economic, environmental, and sociocultural.



A pioneering study

This research is a methodological milestone: it identifies and profiles high-impact international travelers, compares their behavior with a control group, and measures their contribution to the local value chain. It measures how much they spend and how, on what, and what effect that spending has on the local value chain.

Given the lack of standardized indicators for this segment, the study combines document analysis, more than 30 in-depth interviews, questionnaires, direct observation, and a survey of 524 international travelers with explicit eligibility criteria. The results are triangulated with official sources and market data, and complemented by a selection of best practices and representative case studies.

WHAT DO WE MEAN BY 'HIGH-IMPACT TRAVELERS'?

They are those who, in addition to generating a significantly greater economic contribution to the destinations they visit, place special value on sustainability, authenticity, and a connection with the local culture. They seek quality, excellence in service, and unique experiences; they prefer high-end accommodations and cuisine prepared with local products.

PILLAR 1. Economic impact: more value per visitor

The results of the survey "Sustainable Luxury Travel Research: The Environmental, Cultural, and Economic Contributions of Luxury Tourism in Madrid" show that high-impact international travelers are a decisive driver of value creation in Madrid.

The research estimates that this profile generates a total impact of approximately €980 per day on the Madrid economy and €6,860 per traveler when direct, indirect, and induced effects are considered. These metrics allow us to interpret not only immediate consumption, but also its capacity to stimulate employment, suppliers, services, and local spending across successive layers of the urban economy.

The difference compared to the average traveler can also be seen in the total expenditure declared at the destination. **According to the study, the high-impact traveler spends an average of €10,183 per trip in Madrid, compared to €6,253 for the non-luxury traveler, and stays longer in the city, with a median of seven days compared to five.**

The key is not only the volume, but also the structure of spending. This profile allocates 2.4 times more to accommodation, 2.1 times more to food, 1.7 times more to experiences, and 3.3 times more to shopping. **On average, this traveler contributes 2.4 times more to Madrid's economy than the non-luxury traveler.**

HOW DOES THE HIGH-IMPACT TRAVELER BEHAVE IN MADRID?

- They stay in five-star and luxury hotels
 - They seek out signature cuisine
 - They shop in the premium segment
 - They demand exclusive cultural experiences
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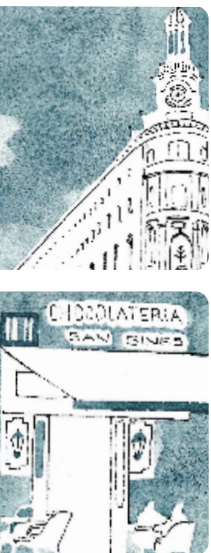
The high-impact traveler is a key driver of value creation:¹

- **€980 daily impact on Madrid's economy**
- **€6,860 per traveler**
- **€10,183 average expenditure per trip**
- **Average stay of 7 days**
- **Expenditure 2.4 times higher than average**

High-impact travelers tend to stay longer and spend more in Madrid, particularly on shopping, accommodation, dining, and experiences. On average, shopping expenditure among high-impact travelers is 3.3 times higher than that of average travelers.

Within the high-impact segment itself, the report highlights a sub-profile: **those who travel with the assistance of a Virtuoso agency spend up to 6.1 times more than conventional travelers**, and in their spending structure, experiences can represent up to 31% of the total associated with the stay and include high-cost premium formats such as private tours, specialized guides, or even the occasional privatization of spaces.

Urban and cultural advantages of Madrid



The study also shows that this type of visitor greatly values pedestrian mobility. **Ninety-six percent consider it important to be able to get around on foot when deciding where to stay, compared to 89% of the average traveler.**

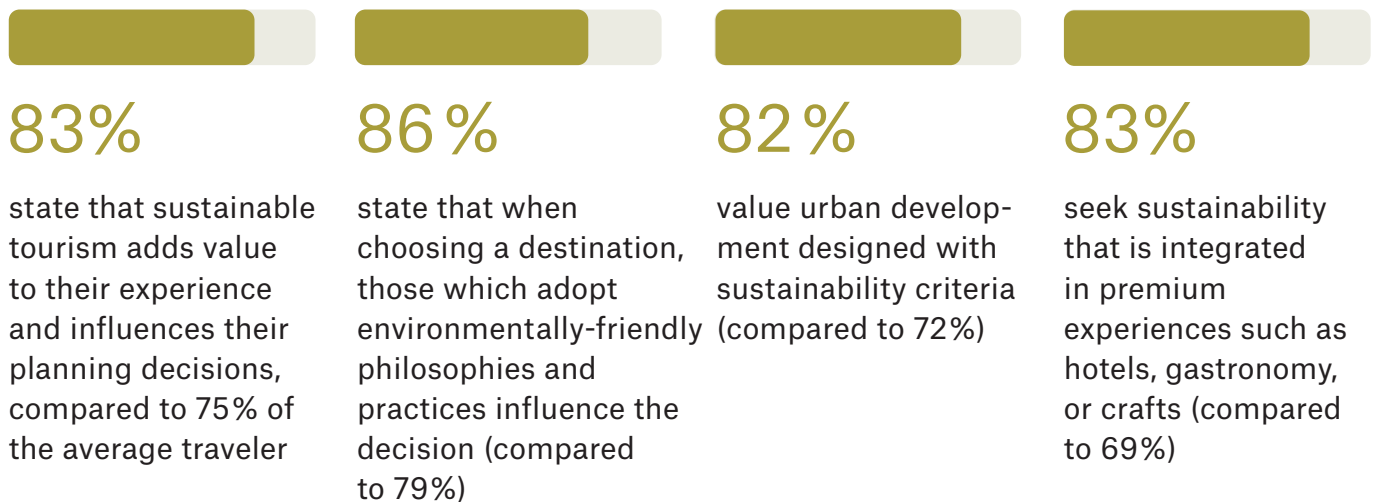
Madrid's rich heritage and human scale facilitate an experience in which museums, hotels, shopping districts, and a vibrant culinary scene coexist within easy reach. The Community of Madrid has 41 five-star or five-star luxury hotels with 6,663 rooms and 13,653 beds, 36 of which are located in the city of Madrid.² In addition, the Paisaje de la Luz (Landscape of Light) axis, a UNESCO World Heritage Site, is home to institutions such as the Prado National Museum, the Thyssen-Bornemisza National Museum, and the Reina Sofía Museum. In recent years, the Royal Collections Gallery has also opened, and urban improvements—such as the creation of pedestrian zones around the Royal Palace and the renovation of Gran Vía—have enhanced the urban experience and the quality of public spaces.



Moreover, the surrounding region has taken on an increasingly prominent role as a natural extension of the experience. The report highlights the proximity of first-rate heritage and natural sites throughout the Community of Madrid, which also encourage longer stays and a more diverse experience, such as the Monastery of San Lorenzo de El Escorial and the Royal Sites linked to the history of the monarchy, including Aranjuez, as well as Alcalá de Henares and the natural environment of the Sierra de Guadarrama.

PILLAR II. Environmental impact

The contribution of high-impact tourism to sustainability is further strengthened by its focus on responsible practices. The report identifies that high-impact travelers have a more demanding and proactive mindset when it comes to sustainability throughout their entire trip.



According to the survey's results, comparing destination perceptions among major European capitals for this same high-impact profile, Madrid ranks even higher than Paris and Lisbon in key destination experience attributes. In particular, it stands out for its perception as a safe, unique, inclusive, and historic city, reinforcing a distinctive offering based on identity, urban quality, and an integrated experience.

Another key finding is this segment's ability to diversify their experience and spread their spending beyond the most central areas. One part of the study shows that 68% visit Madrid Río and 63% visit Las Quintas de Madrid, demonstrating an interest in exploring areas and attractions beyond the traditional tourist circuit.

PILLAR III. Culture and the experience economy

Forty-nine percent of high-impact travelers seek exclusive and private experiences and double their spending in this area. In practice, many of these experiences rely on local networks of culture, heritage, historic businesses, crafts, restaurants, specialized guides, and personalized services. The high price of these experiences, such as private visits to museums or cultural institutions, contributes very positively to the increased revenue for these establishments, both public and private.

This profile of visitor not only seeks to do more things, but also to experience them that can only be found here: places with character, crafts and know-how, Spanish products, neighborhood stories, and businesses with a legacy. This demand has contributed to the **revitalization of small businesses, traditional and historic shops, and offerings with local identity, which are finding a new niche and greater visibility within the high-impact tourism ecosystem.**

At the same time, high-end hotels, including those belonging to international chains, are investing in the neighborhood and integrating its identity into the guest experience. This includes, for example, incorporating amenities and details from traditional shops and local brands with a long history, such as La Pajarita, whose sweets are part of the welcome experience in certain establishments.

However, the report identifies a significant demand gap that points to specific opportunities for the city and the local tourism industry in relation to the offerings aimed at high-impact travelers. According to the survey, six out of ten high-impact visitors expressed an intention to make a purchase during their stay, but only five actually did so.

A similar pattern can be observed in activities such as visiting local markets and wellness experiences. This gap creates an opportunity to better design, package, and communicate a more visible, curated, and connected offering for this profile, especially in labor-intensive sectors that generate direct and skilled employment, from therapists and wellness professionals to specialists in products, retail, and experiences.

AN INTEGRATED ECOSYSTEM

Over the past decade, Madrid and its surrounding areas have built an integrated ecosystem that brings together public-private partnerships, improved connectivity, international investment, and the development of high-end cultural, gastronomic, and commercial offerings with a local identity.

In this process, the development of super-premium products and services has been crucial: exclusive after-hours cultural experiences in major museums, new hospitality and entertainment models based on exclusive access, and personalized services with high added value. From an urban perspective, the growth of the segment has been supported by the restoration of architectural heritage in the historic center, raising quality standards and reinforcing identity and urban fabric through a sustainable approach.

Connectivity is another key pillar of this transformation. Adolfo Suárez Madrid-Barajas Airport reached 68.1 million passengers in 2025, solidifying Madrid as an international hub.³ Added to this is a renowned culinary scene: 31 Michelin-starred restaurants in the city (39 stars in total), and 35 establishments and 43 stars in the Community of Madrid,⁴ reflecting a gastronomic offering that extends beyond the city center. In fact, in the survey, 35% of high-impact travelers plan to dine at a Michelin-starred restaurant during their stay.



The dynamism of premium consumption confirms the city’s positioning. Tax-free spending grew by 163% between June 2023 and May 2024, with an average purchase amount of €2,600, placing Madrid as the second European destination in terms of luxury shopping profitability per tourist.⁵

Overall, the data shows that high-impact international tourism is not an isolated phenomenon, but rather the result of a structural transformation that combines investment, infrastructure, product sophistication, and heritage enhancement, consolidating a model aimed at generating greater economic value with less relative pressure on the territory.

A STRATEGIC OPPORTUNITY

High-impact international tourism allows Madrid to generate greater economic value with less relative pressure on the territory, strengthen skilled employment, and consolidate its cultural identity as a global competitive advantage. This report not only quantifies an emerging reality, but also provides a methodological framework to guide public and private decisions toward a more profitable, sustainable, and distinctive growth model within the European context.

NOTES:

1. Virtuoso, "2026 Sustainable Luxury Travel Research. The Environmental, Cultural, and Economic Contributions of Luxury Tourism in Madrid."
2. INE, Hotel Occupancy Survey (EOH), provisional figures for the end of 2025 published in January 2026 (5* and 5* Grand Luxury segment, Community of Madrid and city of Madrid).
3. AENA. Press release: "Adolfo Suárez Madrid-Barajas Airport closes 2025 with record traffic figures." January 13, 2026.
4. MICHELIN Guide Spain (2026 edition)
5. Indicator: "Purchases by non-EU travelers." Updated January 2026; last month available cited: December 2025.

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