

Executive summary

Tourism in Spain 2026: new opportunities for sustainable growth and of higher added value

The Spanish tourism sector faces 2026 from a position of strength, with a positive outlook prospects after stabilisation of post-pandemic growth. In 2025, Spain reaffirmed its global leadership with 97 million international arrivals and record spending of €135 billion, ranking second worldwide. Tourism GDP grew by 2.7% and is expected to maintain a growth rate of around 2.5%-2.7% in the coming years. This scenario reflects a more balanced sector, with clear signs of regional diversification and deseasonalisation, and with emerging segments that boost its added value.

Among the trends that are becoming established and will continue to shape the future of the sector are its deseasonalisation, with a more even distribution of activity throughout the year, and diversification towards rural destinations, which are gaining ground against traditional sun and beach destinations. In addition, domestic tourists are reducing their domestic trips and increasing their spending on international destinations. By region, Andalusia leads the growth of international tourism in the peak summer season of 2025, while Catalonia loses prominence to the Balearic Islands. The hotel sector is maintaining record occupancy rates and increasing its profitability, albeit at a more moderate pace.

In this context, as outlined in the second article of this report, **luxury tourism** emerges as a strategic segment to increase the added value of the sector. Although it represents only 3% of international cards, it accounts for 20% of in-person spending. The premium tourist spends an average of €731 per day compared to €46 for the conventional tourist. Madrid leads this segment, driven by the opening of ultra-premium hotels, followed by the Balearic Islands, Barcelona and coastal enclaves, such as Marbella. Building loyalty among these travellers and attracting markets, such as the

US, Switzerland or Persian Gulf countries, will be key to reinforcing this trend.

Another key vector that we analyse in the third article is the so-called **silver tourism**, which focuses on people over 65 years old. This group already represents 21% of the population and has an above-average income. According to data on card payments from CaixaBank, it accounts for 16% of national tourist spending and shows a marked preference for domestic destinations and trips outside of peak season. Its role is essential to destationalise demand and revitalise rural areas, where it accounts for more than 20% of tourist spending. With demographic projections anticipating strong growth in the senior segment, adapting the offering to their needs will be crucial to harnessing their potential.

The dynamism of tourism has also boosted related sectors, such as the **catering sector**, which has doubled its turnover since 2021 and has reached record highs in employment. However, as we analysed in the fourth article, the Spanish catering sector has a high business turnover. Each year, one in ten companies enters or leaves the market, with a business turnover well above the national average and the rest of Europe. Reducing this vulnerability requires moving towards more scalable and professionalised business models, capable of improving profitability and survival in a highly competitive and seasonally sensitive environment.

In short, the Spanish tourism sector faces the future with clear opportunities: consolidate strategic segments, such as luxury and silver tourism, strengthen business competitiveness and continue to make progress on deseasonalisation and geographical diversification of destinations. Spain has the ingredients to consolidate its global tourism leadership and guarantee balanced and sustainable development in the coming years.