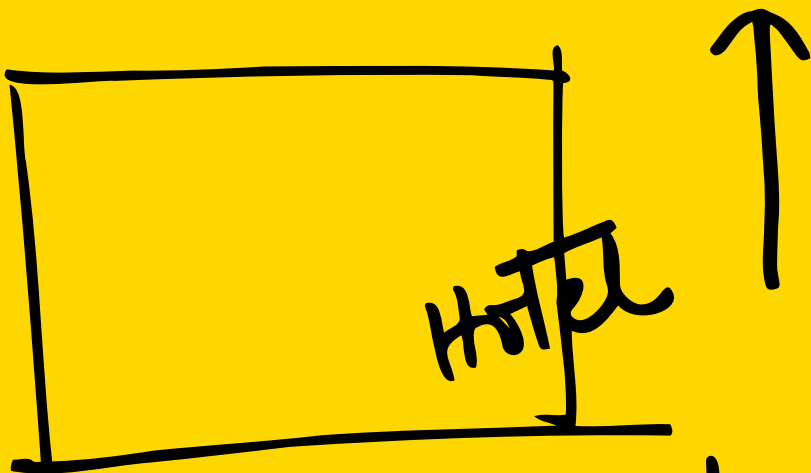


# Madrid. Tourism Report

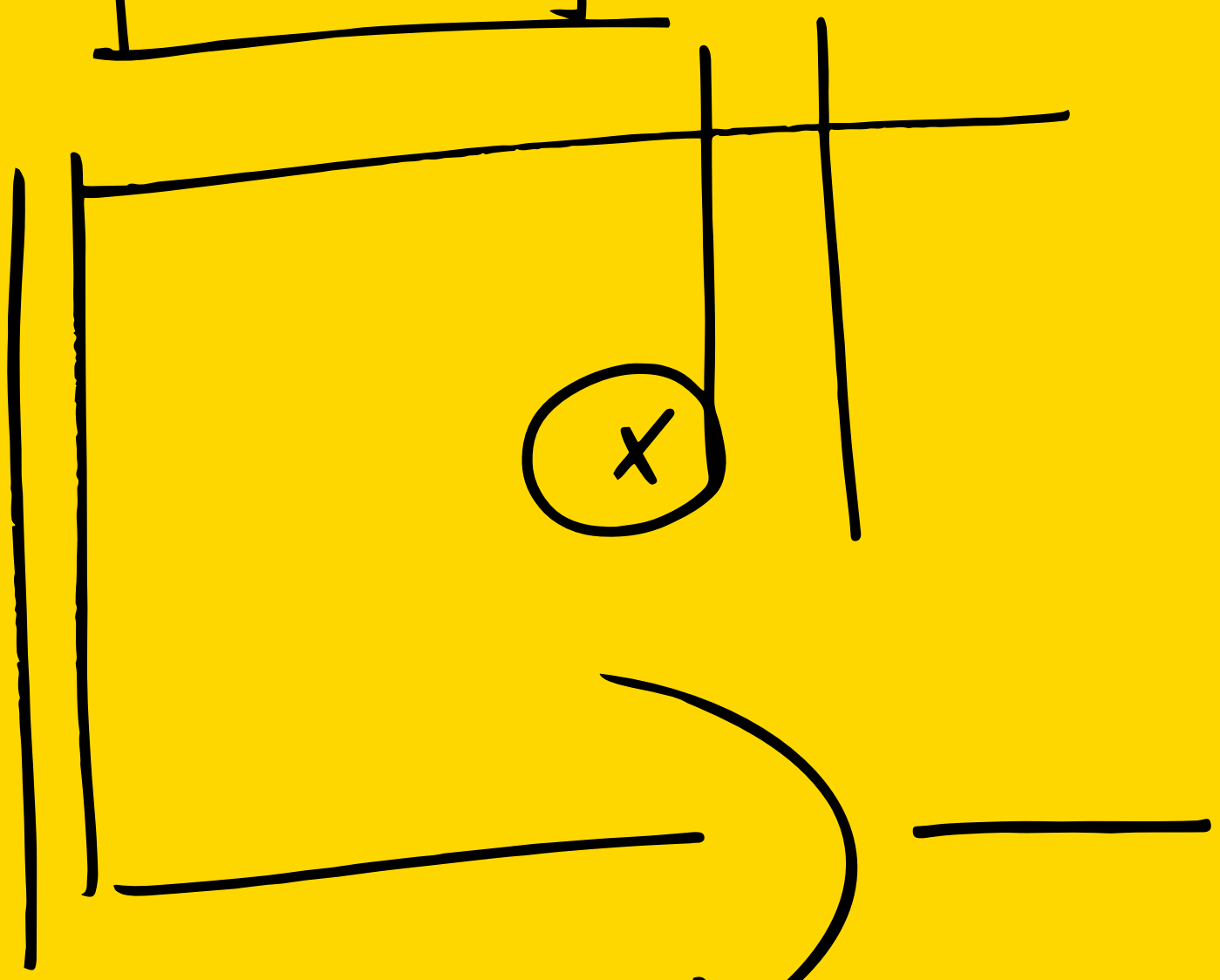


# 19





~~XXXXXX~~



14:00  
Corrido!

sol

→  
lavapies

# WELCOME



Madrid is an exciting and passionate experience. This is what visitors – more than 10.4 million in 2019 – say about our city. There are many reasons to visit Madrid, all of which underscore the savoir faire of the city's residents and tourism sector. My sincere thanks to everyone on behalf of all of us on the city council.

Without a doubt, travellers to Madrid discover a city with a captivating cultural heritage, an internationally diverse and renowned entertainment offering, and a gastronomic scene that merges tradition and innovation. But Madrid is much more than that. It also offers an inviting and professional backdrop for major gatherings and conferences, sporting events and film shoots.

The important global challenges of urban tourism should strengthen us as a society. It's time to shine a light on the initiatives that make Madrid a more sustainable, accessible and high-quality destination. The 2019 Madrid Tourism Report is yours to page through. Understanding how tourism works will help Madrid develop. The city is a project built day by day, by all of us.

José Luis Martínez-Almeida,  
Mayor of Madrid

Executive  
Summary

# MADRID AT A GLANCE

How has tourism  
in the city evolved  
in 2019?

Madrid's strength as an urban destination grew in 2019. Total overnight stays in regulated establishments surpassed 22 million. International travellers generated more than 60% of these overnight stays. The city's open and welcoming atmosphere, connectivity and accessibility, together with its cultural, gastronomical and leisure offer, are the main reasons behind Madrid's national and international renown as a tourism destination.

In 2019, Madrid welcomed a total of 10,419,709 travellers, a 2.06% increase over 2018. Of these, more than 5.5 million (54.85%) were international travellers, who generated a total spend of more than €10,451 million.

One factor that confirms Madrid's standing as an urban destination is the growth in average stay by visitors to the city. The average stay was 2.17 nights in 2019, a 3.56% increase over the previous year.

The Madrid Destino Tourism Department (City Hall of Madrid) presents the 2019 Madrid Tourism Report, a guide to analyse and communicate the supply and demand of the city's tourism to better understand and meet the needs and expectations of this vital sector.

+22  
M

OVERNIGHT  
STAYS

On this occasion, the report also includes the results of a study on the city of Madrid as a culinary destination.

In terms of international outbound markets, the U.S. is once again the most important for Madrid, as well as the one with the greatest growth. In 2019, 809,409 U.S. travellers visited the city, an 18.7% increase compared to 2018. Tourists from China stand out as the second outbound market with the greatest growth and visitors from Italy recover from previous levels.



On the other hand, meetings tourism continues to grow in the city. Data from 2018 – the last official figures – leave no room for doubt: more than 23,300 meetings were held in the city, representing 14.8% year-on-year growth. According to the latest ranking by the International Congress and Convention Association (ICCA), Madrid ranks third as a global meetings venue.

The latest global tourism trends and industry expectations place Madrid in an ideal competitive situation for the coming decade. To this end, the Tourism Department of the City Hall of Madrid promotes a responsible management model grounded on sustainability and digital transformation, in benefit of both visitors and residents. Lastly, the Business Perception Survey, carried out by Madrid Destino's Tourist Intelligence Centre, underlines the Madrid tourism sector's highly positive assessment of the results obtained in 2019.

2019 Madrid

# TABLE OF CONTENTS

Tourism Report

01. Destination Madrid		02. Visitor experience	
	Page		Page
Introduction	8	Introduction	28
2019 by the numbers	9	The Madrid experience	29
Main outbound markets	10	Leisure and entertainment	30
Travellers, overnight stays and average stay	12	Cultural patrimony	34
Key accomodation indicators	17	Gastronomic tourism	36
Connectivity	20	Major events	38
Tourist spending	22	Academic tourism	39
Meetings tourism	24	Shopping tourism	40
		Visitor services	42

### 03. 2020 trends and forecasts

	Page
Introduction	46
Global tourism by the numbers	47
Worldwide trends in the tourism ecosystem	48
Toward a sustainable and high-quality tourism	53
Industry forecasts	55

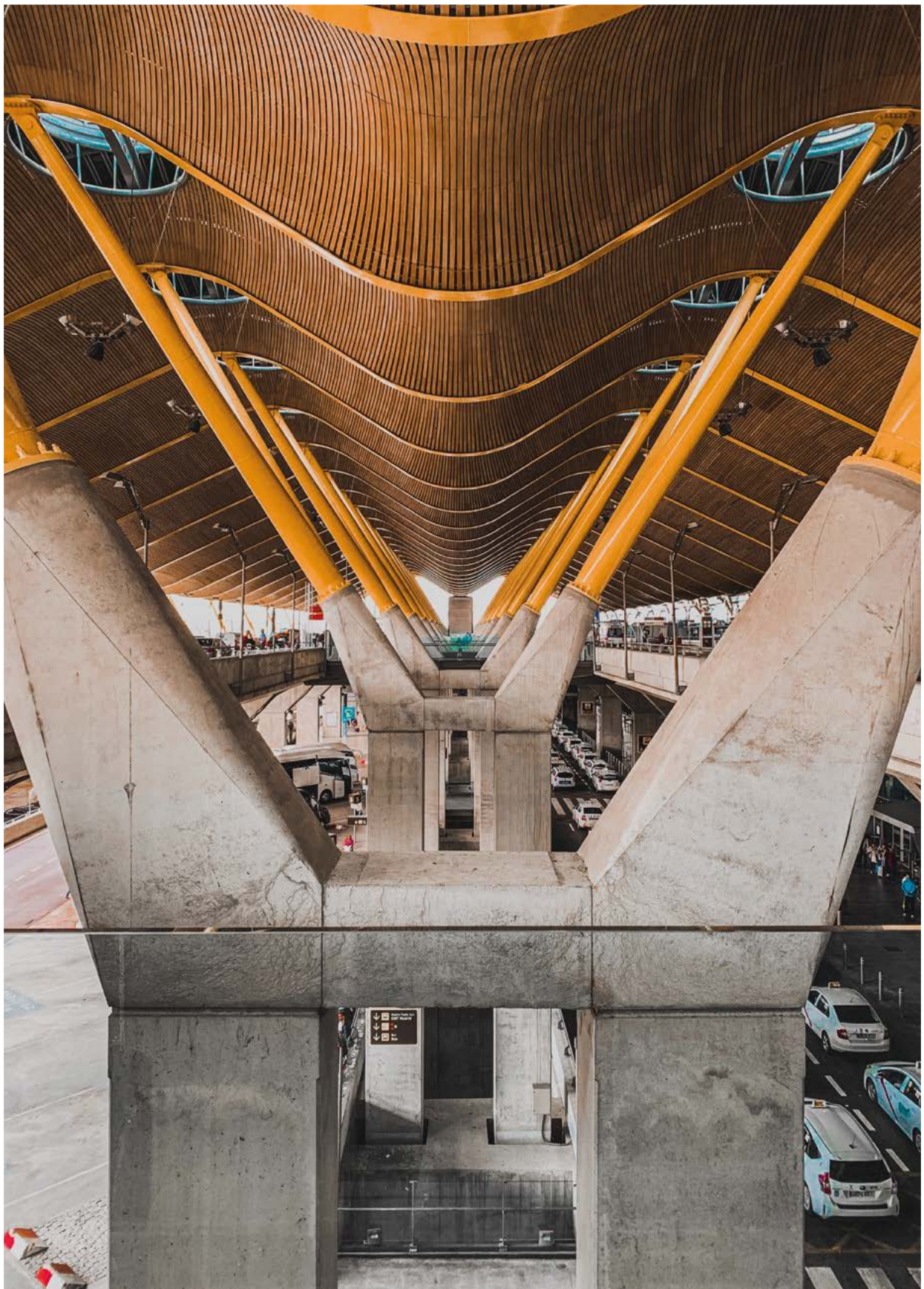
### 04. Promoting tourism from Madrid's City Hall: high-impact management

	Page
Introduction	62
Key indicators	63
Visitor services	64
Travel Trade and Connectivity	65
Tourism marketing	66
Madrid Convention Bureau	68
Madrid Film Office	69
Research notes	71
Images	72

# 01

A good year. Developments in 2019 in terms of the number of visitors, overnight stays, duration of stay, hotel occupancy and tourism spending all underscore Madrid as an outstanding urban destination. International travellers represent 55% of total visitors.

→ Destination  
Madrid



5.7

MILLION  
INTERNATIONAL  
VISITORS  
IN 2019

Clearly, 2019 was a good year for the tourism industry in the city of Madrid. According to the Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAP) elaborated by Spain's National Statistics Institute (INE), **Madrid received 10.4 million visitors, who generated 22.6 million overnight stays in hotels and regulated apartments.** The significance of the international market is evidenced by a 9.7% volume increase in overnight stays with respect to the previous year, already denoting 63% of the total.

78%

HOTEL OCCUPANCY  
RATE BY ROOM

Madrid has 841 hotel establishments (8.5% more than in 2018), reaching a 78% occupancy rate, compared to 76% in the previous year. **In terms of hotel rooms, 63.81% fall in the four- and five-star categories.**

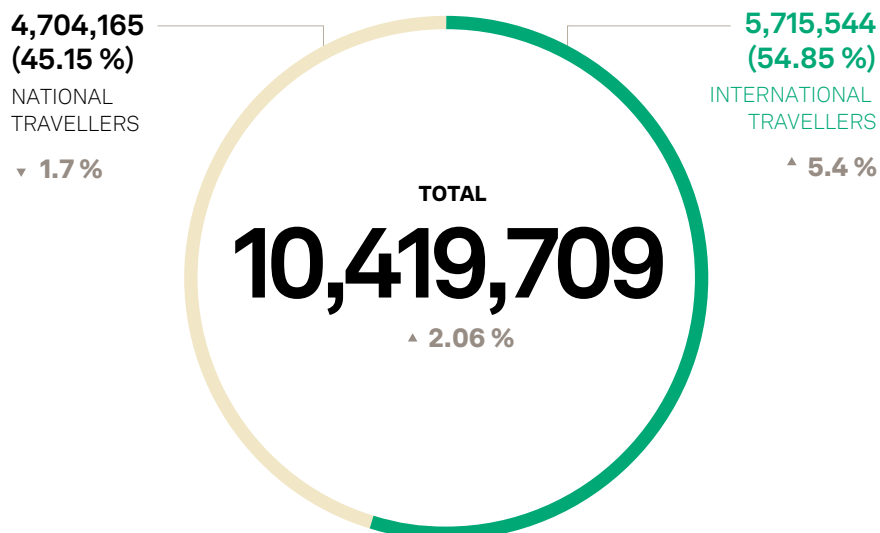
UPWARD TREND  
OF HOTEL  
PROFITABILITY  
AND PERFORMANCE  
INDICATORS

For its part, the sector noted an average stay of 2.17 nights, a 3.56% increase over 2018. **This uptick in average stay was driven by solid international demand,** which registered an average stay of 2.5 nights, considerably longer than the 1.78 nights of national travellers. Against a context of rising hotel demand and number of available rooms, the positive evolution of hotel profitability and performance indicators is especially noteworthy. The average daily rate (ADR) is €101.56 and revenues per available room (or RevPAR) are €79.61, as noted by the National Statistics Institute (INE). These solid results are also reflected in tourism spending. The international travellers who visited the Community of Madrid spent a total of €10,451.50 million in 2019, a 12.58% increase compared to 2018.

# 2019 BY THE NUMBERS

◆ = YEAR-ON-YEAR VARIATION

## Travellers



## Average stay

Nights in Madrid

OVERALL

**2.17**

▲ 3.5 %

NATIONAL

**1.77**

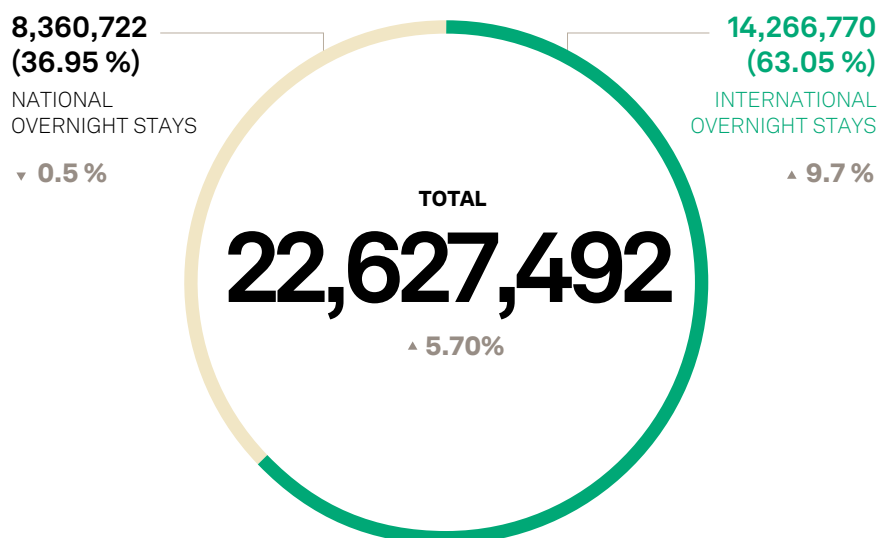
▲ 1.2 %

INTERNATIONAL

**2.50**

▲ 4.1 %

## Overnight stays



## International travellers spending

TOTAL

**10,451**

MILLION EUROS

▲ 12.58 %

DAILY AVERAGE

**270**

EUROS

▲ 10.86 %

Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

# MAIN OUTBOUND MARKETS

The U.S. is the most important outbound international market for the city of Madrid and also the one with the greatest growth. In 2019, Madrid welcomed more than 809,000 U.S. travellers, denoting a 14.16% market share and an 18.70% increase compared to 2018 according to the Hotel Occupancy Survey (EOH) and Tourist Apartment

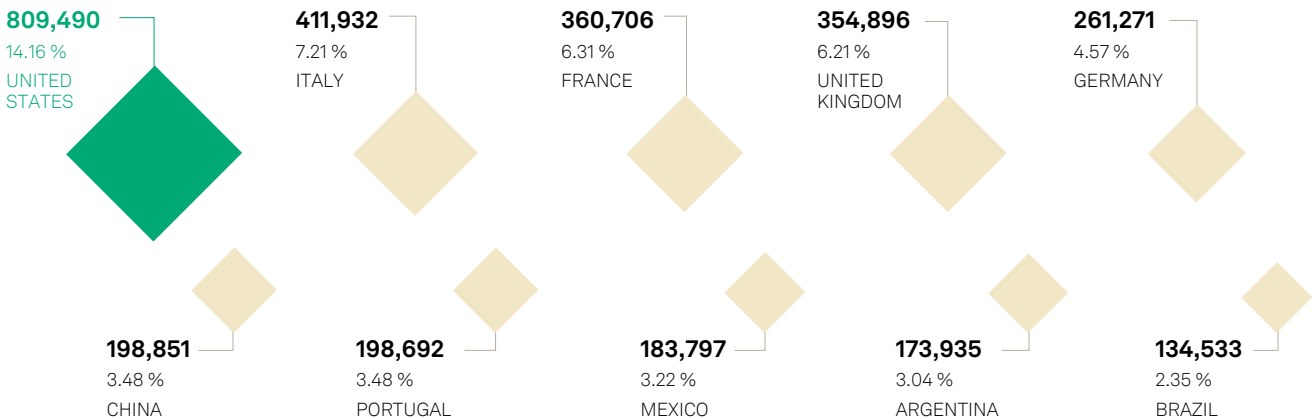
Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE). Italy is the second largest outbound market, returning to previous levels after a 1.7% drop in 2018. With regard to Latin America, Brazil is the fastest-growing market, expanding by more than 5.2% in 2018, followed by Mexico, which grew by 3.29%.

**198,851**  
travellers from China, a market that grew 16.82% over 2018

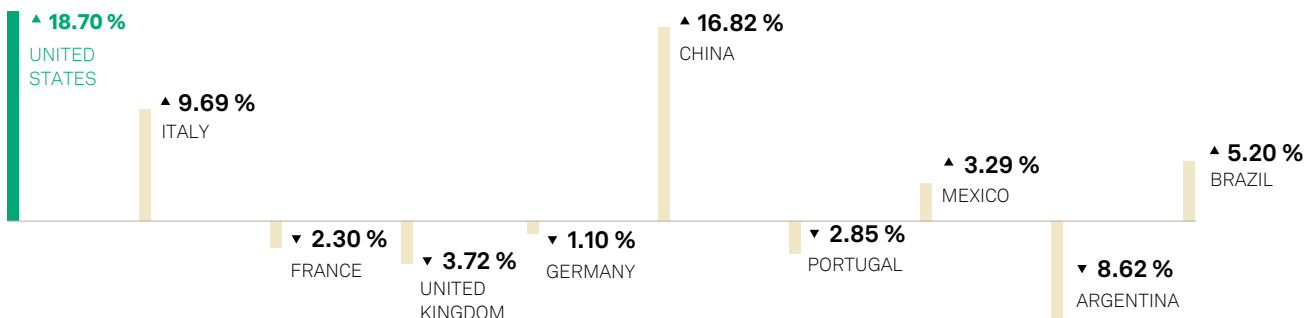
**411,932**  
travellers from Italy, the second core outbound market with 9.69% growth

## International outbound markets

Total travellers and % over total travellers



## Year-on-year variation of international outbound markets



Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

**THE U.S. CONSOLIDATES ITS POSITION AS THE TOP INTERNATIONAL OUTBOUND MARKET FOR MADRID**

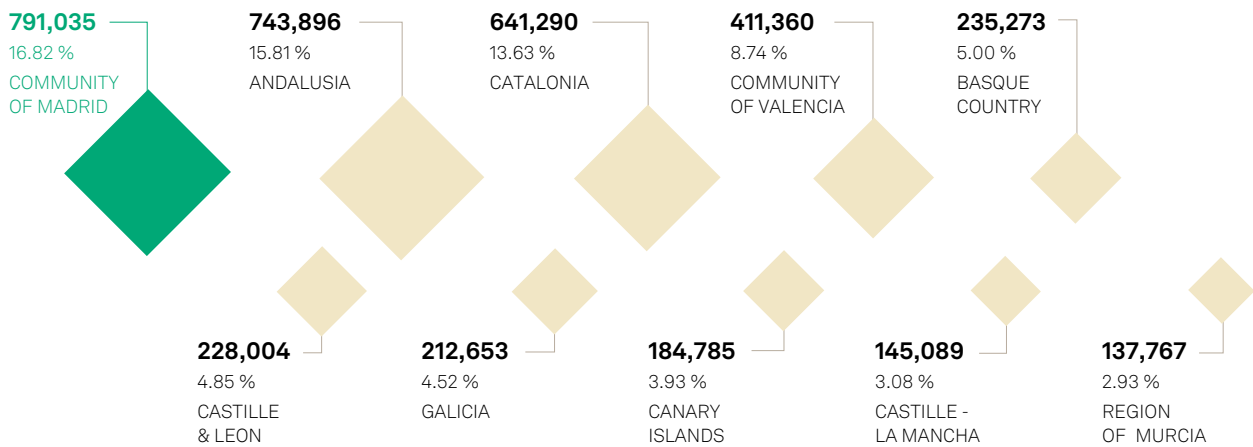
**THE REGIONS OF MADRID, ANDALUSIA & CATALONIA TOP THE LIST**

came roughly 790,000 visitors from the Community of Madrid, 743,000 from Andalusia and 650,000 from Catalonia. These three markets represent 50% of the total volume of national travellers. The largest year-on-year increase was seen in the inbound market of the Community of Madrid, which grew 6.64% over 2018.

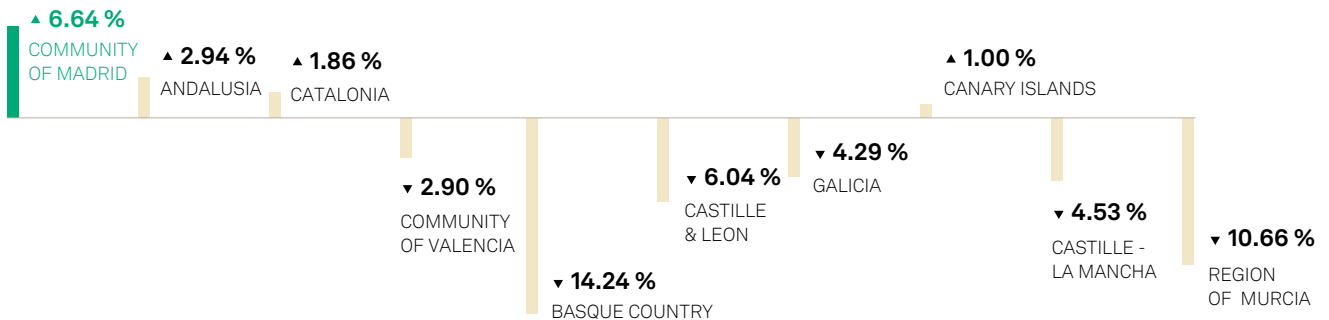
For another year running, the regions of Madrid, Andalusia and Catalonia are the top three inbound markets for the city of Madrid. In 2019, the city wel-

### Inbound markets

Total travellers and % over total travellers



### Year-on-year variation of inbound markets



Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

# TRAVELLERS, OVERNIGHT STAYS AND AVERAGE STAY

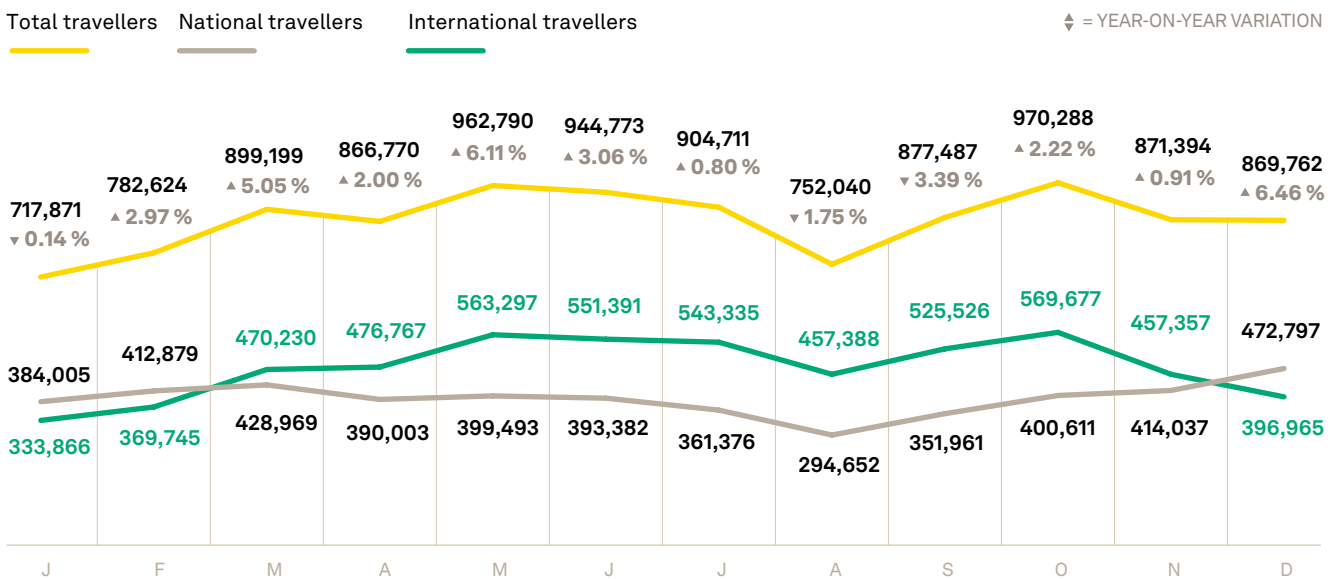
## Steady upturn in the volume of travellers

The international market has consolidated its role as the main source of travellers to Madrid. Based on information from the INE, the city received 5,715,544 international travellers in 2019, denoting a 5.4% increase compared to 2018 (5,424,969 travellers). This uptick dovetailed with a downturn in the national market, which declined 1.7%, from 4,784,756 travellers in 2018 to 4,704,165 travellers in 2019. The drop in national market might stem from a slowdown in Spain's economic growth, as well as a greater sensitivity of national travellers to the increase in the ADR (7.78%) in 2019.

SINCE 2016,  
INTERNATIONAL  
TRAVELLERS TO  
MADRID EXCEED  
NATIONAL  
TRAVELLERS

**970,288**  
travellers arrived to Madrid in  
October, setting an all-time record

## Monthly evolution of travellers

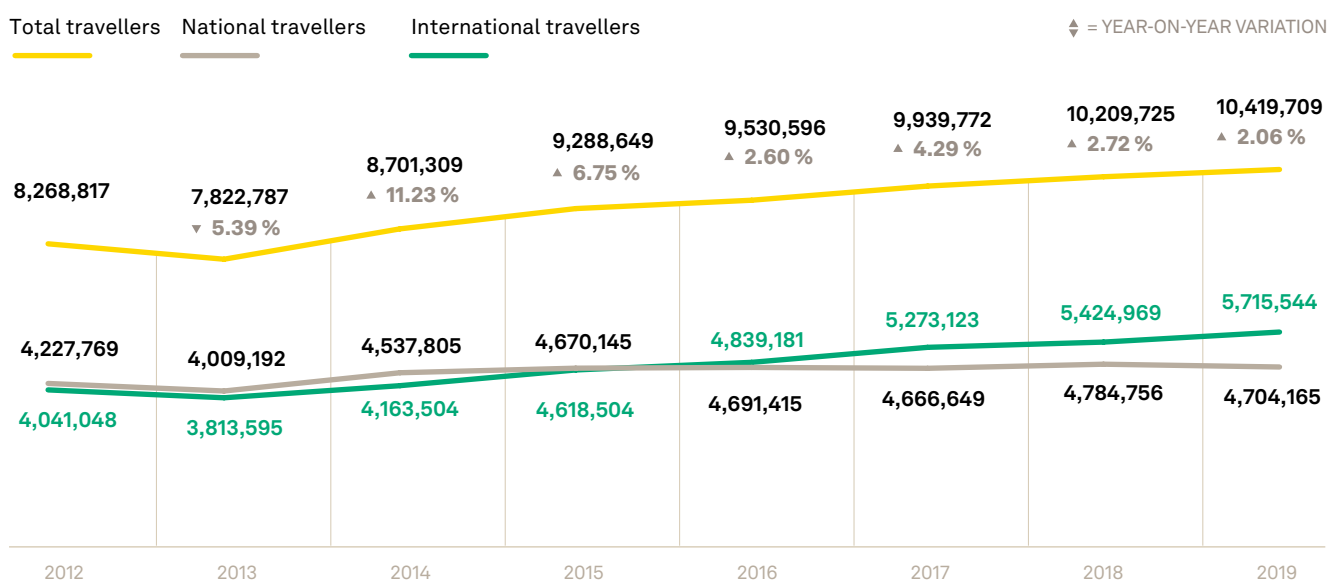


Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

**+6 %**  
 DECEMBER  
 RECORDED  
 THE HIGHEST  
 YEAR-ON-YEAR  
 INCREASE OF  
 TRAVELLERS



## Annual evolution of travellers



Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

## More than 14 million international overnight stays

According to the INE, Madrid registered 14,266,770 international overnight stays in hotels and regulated apartments in 2019, growing 9.7% over the previous year; and 8,360,722 national overnight stays, reflecting a 0.5% drop compared to 2018. In 2019, the international market represented 63.05% of the total volume of overnight stays, compared to 36.95% generated from the national

**+63 %**

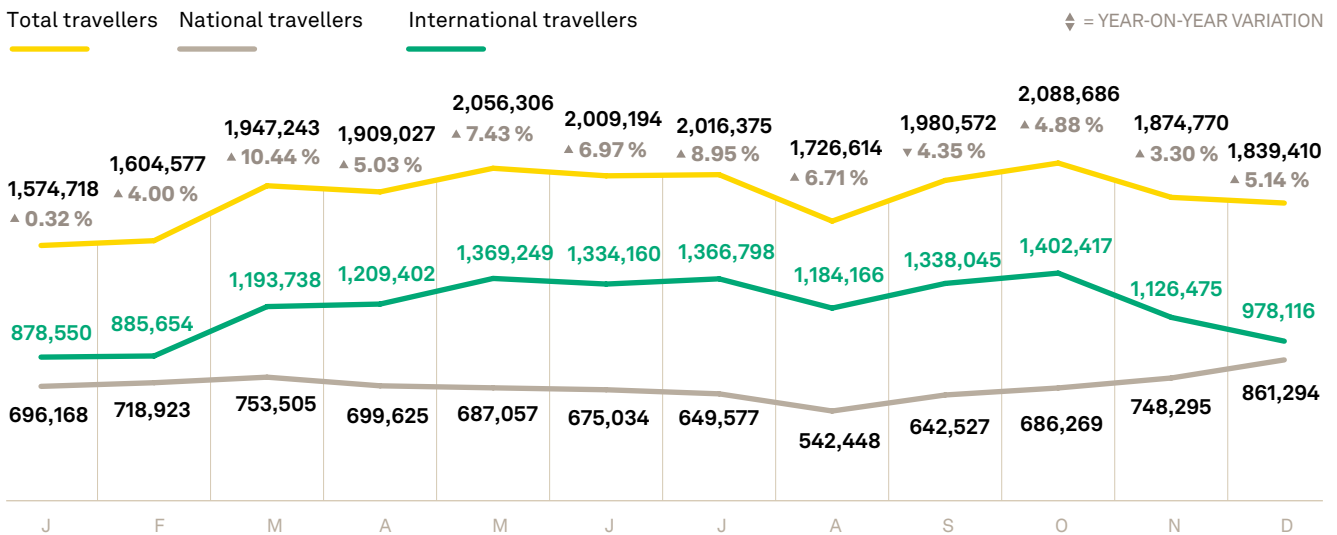
of overnight stays are generated by international travellers

**+35 %**

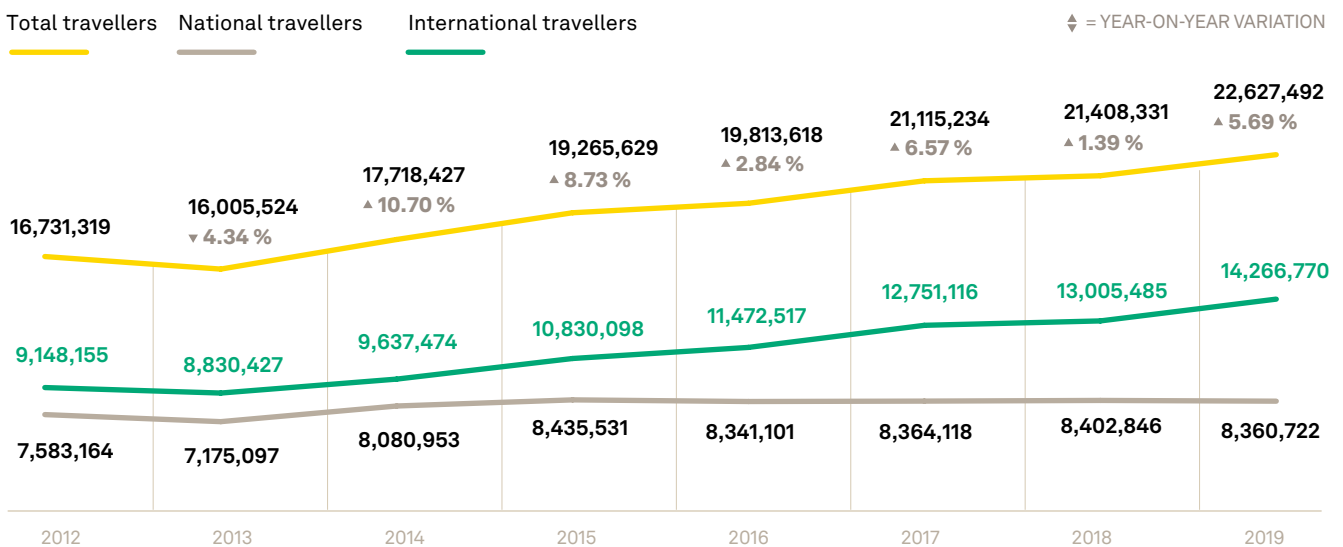
INCREASE IN THE NUMBER OF OVERNIGHT STAYS FROM 2014 TO 2019

market. October was the month with the largest volume, with 2,088,686 overnight stays. Nonetheless, the highest year-on-year increase was in March, which recorded a 10.44% increase in overnight stays compared to 2018.

### Monthly evolution of overnight stays



### Annual evolution of overnight stays



Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

## March: more visitors and lengthier stays

The monthly evolution of travellers and overnight stays in 2019 shows some interesting peculiarities. In July, the number of overnight stays in hotels and regulated apartments grew 9% compared to 2018, while the volume of travellers increased by only 0.8%. July was also notable in terms of average stay, at 2.23 nights. Events like LGBTI Pride and music festivals such as Río Babel and Mad Cool might explain these figures.

Another noteworthy month was June, when the final of the UEFA Champions League, held in Madrid's Wanda Metropolitano Stadium, might have been the motivating factor behind the year-on-year growth of travellers and overnight stays.

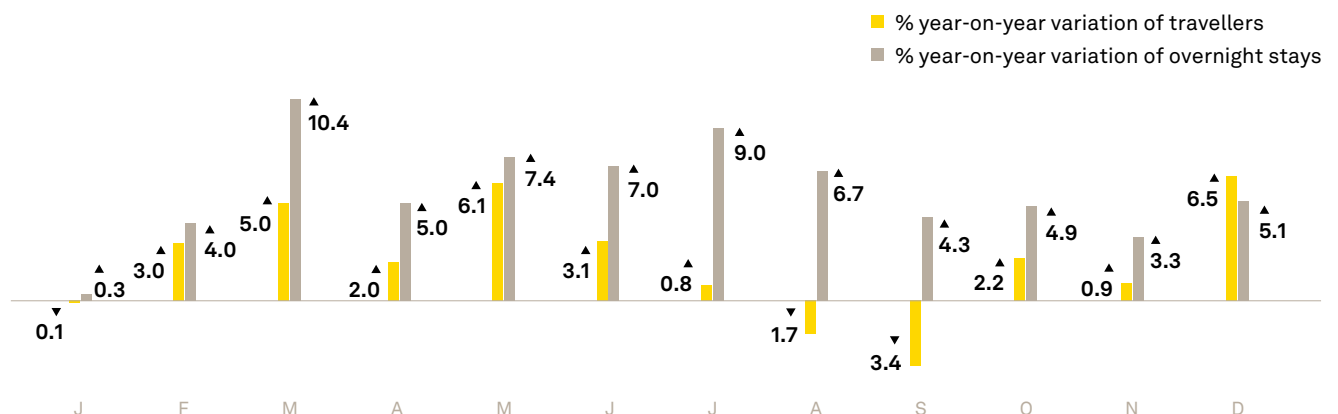
Notable variations are also seen in August, when the volume of travellers fell by 1.7% and nonetheless, overnight stays grew by 6.7%. This explains why it was the month with the highest average stay: 2.3 nights.

Lastly, December was amongst the months with the greatest variations. The number of travellers increased by 6.5% and overnight stays by 5.1%, most likely due to the celebration of the COP25 Climate Summit.

**DECEMBER**  
 recorded a significant increase in the number of travellers and overnight stays

COMPARED TO 2018, OVERNIGHT STAYS GREW MORE THAN TRAVELLERS IN JUNE, JULY & AUGUST

Monthly variation of travellers & overnight stays



Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

## Average stay in the city increases

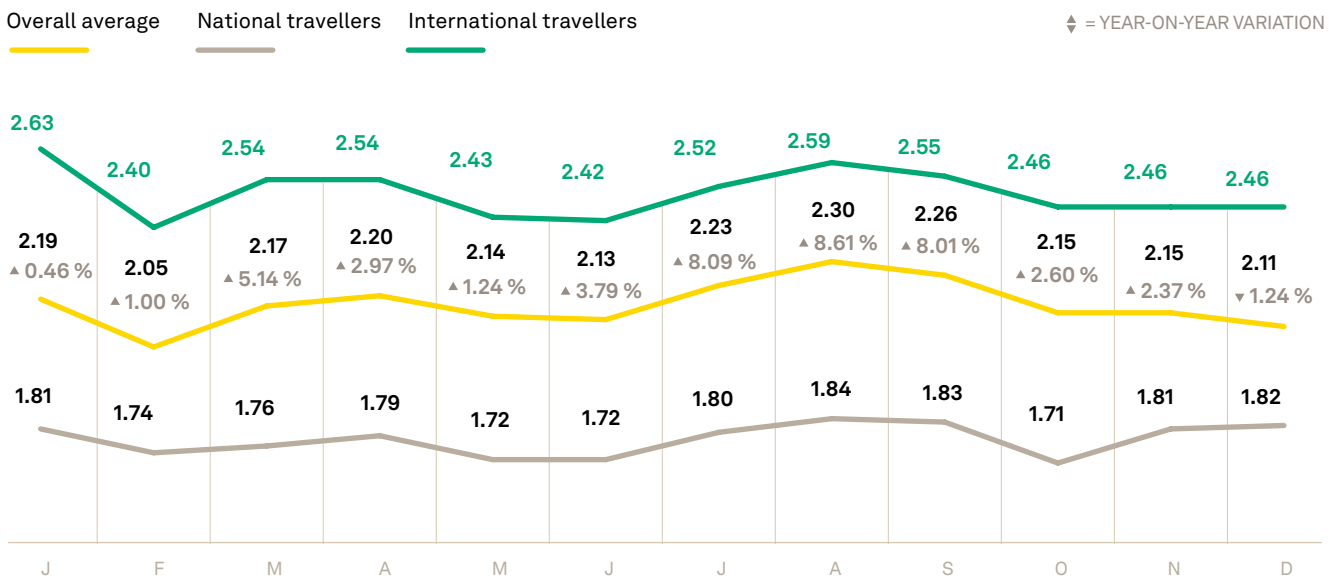
AUGUST WAS THE MONTH WITH THE HIGHEST AVERAGE STAY OVERALL

In 2019, the average stay in Madrid was 2.17 nights, due mainly to behaviour in international demand (2.50 nights). Average stay peaked in August, with 2.30 nights. Between 2011 and 2019, the tourism indicator of average stay has followed an upward trend.

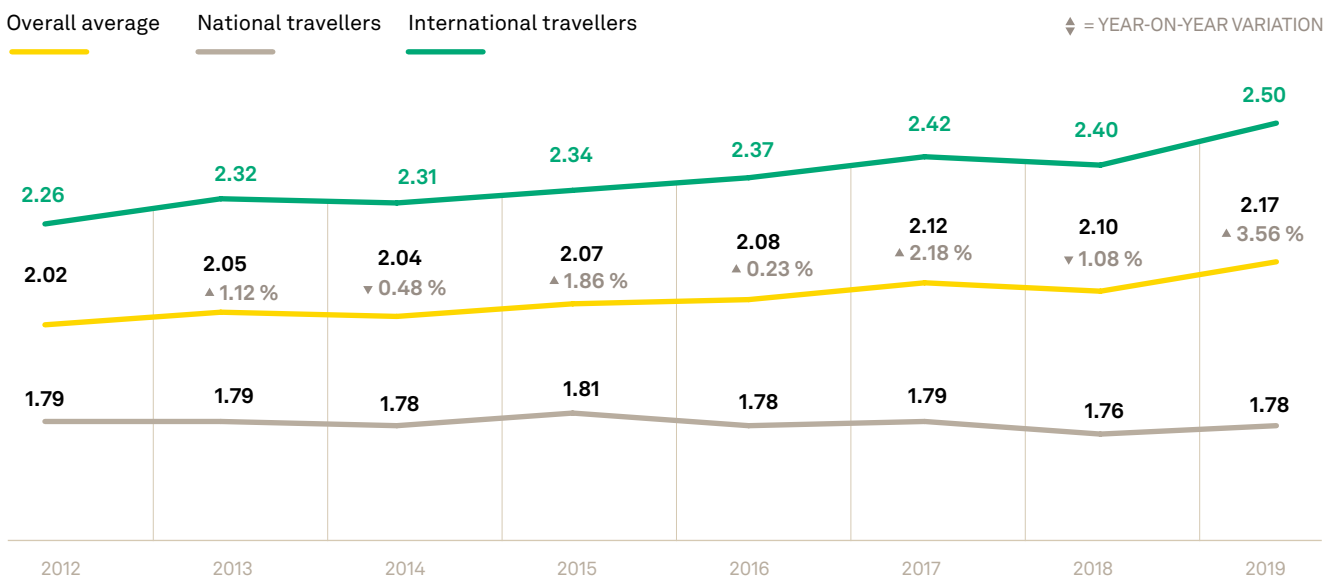
# 2.63

nights in January, the month with the highest international average stay

### Monthly evolution of average stay



### Annual evolution of average stay



Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

# KEY ACCOMMODATION INDICATORS

## More than 60% of bed-places are 4- and 5-star

The city of Madrid has 841 hotel establishments. The number of hotels opened in the city increased 8.47% compared to 2018. There are an estimated 45,046 hotel rooms, 3.84% more than the previous year.

With regard to average occupancy per room, June recorded the highest rate, with 86.6%.

In terms of estimated bed-places available, the number reached 87,648, reflecting a 2.55% increase over the previous year. By categories, the largest growth was observed in five-star bed-places, which grew by 10.75% compared to 2018.

# +86%

AVERAGE  
OCCUPANCY  
PER ROOM  
IN JUNE

## Hotel infrastructure

◆ = YEAR-ON-YEAR VARIATION

### TOTAL ROOMS

# 45,046

▲ 3.84%

### AVAILABLE BED-PLACES

# 87,648

▲ 2.55%

### PERSONNEL EMPLOYED

# 12,287

▲ 5.73%

### ADR

# 101.56 €

▲ 7.78%

### REVPAR

# 79.61 €

▲ 6.80%

### AVERAGE OCCUPANCY PER ROOM

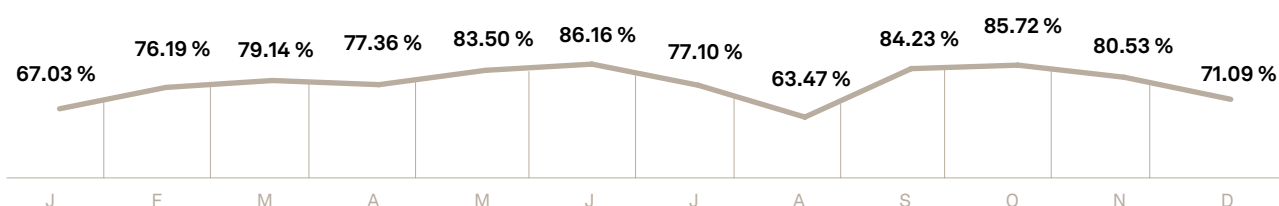
# 77.63 %

▲ 1.22%

## DISTRIBUTION BY CATEGORY



## AVERAGE OCCUPANCY RATE PER ROOM



Source: Hotel Occupancy Survey (EOH) and Tourist Apartment Occupancy Survey (EOAT) elaborated by the National Statistics Institute (INE).

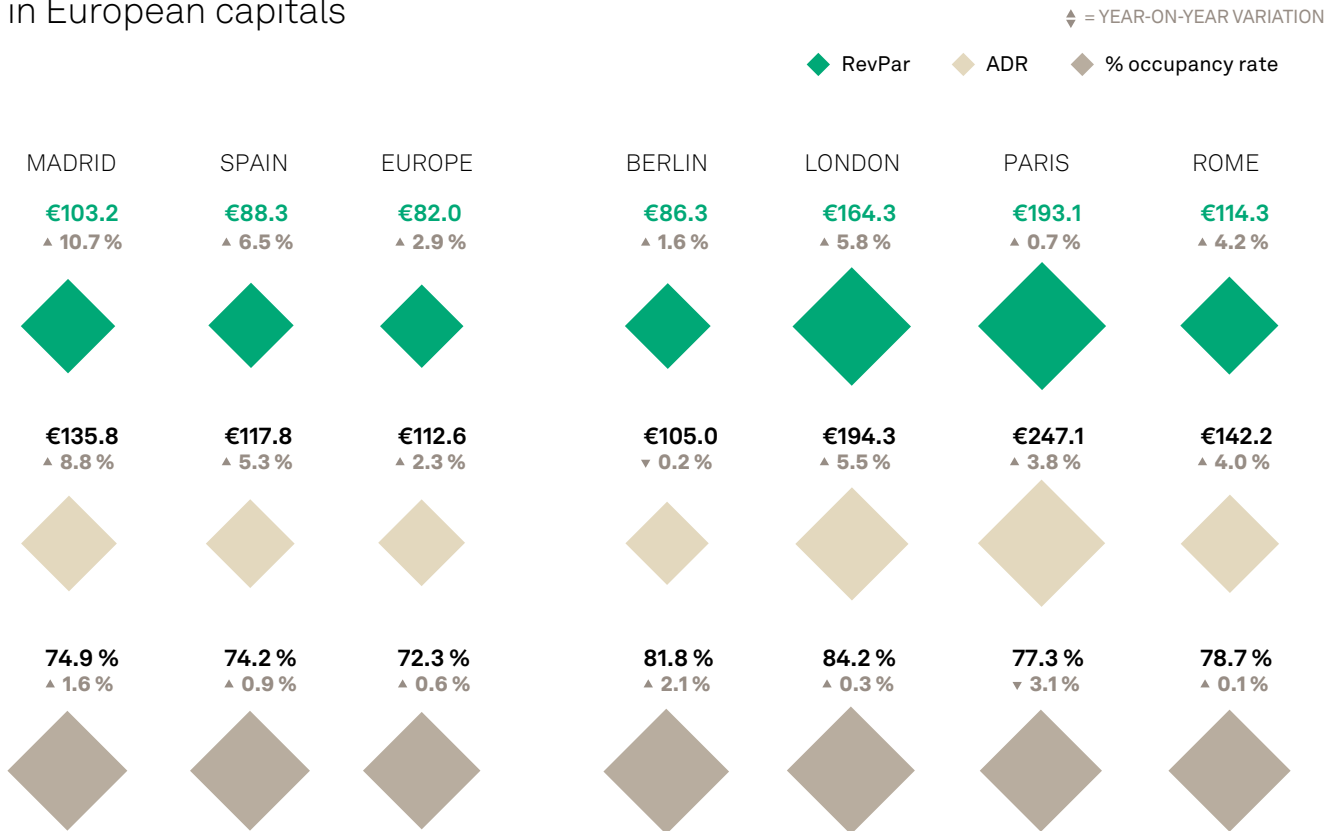
## Madrid's hotel profitability: higher than the European average

Economic globalisation requires a benchmarking of hotel profitability of the main European cities. Data from the specialist firm STR Global were used for this assessment. With regard to ADR, Madrid falls above the mean at €135.80 although lower than Rome, London and Paris. In terms of RevPAR, Madrid achieves a rate of €103.20, a 10.7% increase over the previous year (€93.20).

Madrid's occupancy rate is 74.9%, higher than averages in Spain (74.2%) and Europe (72.3%). That said, it's worth noting that all of the European cities highlighted (Berlin, London, Paris and Rome) recorded better results than Madrid in terms of occupancy rate.



## Hotel profitability in European capitals



Source: STR Global (detailed information in the "Research Notes").

## Main data on Homes for Tourism Use

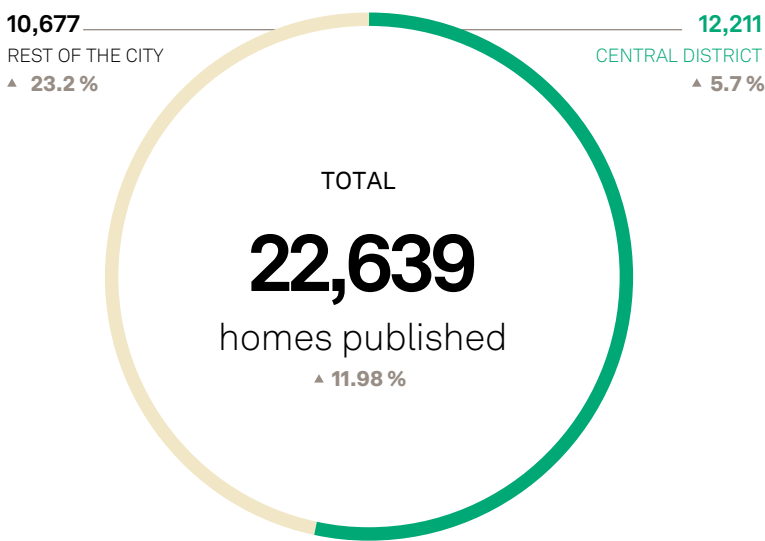
According to the specialist firm Transparent Intelligence, there were more than 22,000 Homes for Tourism Use (HTU) published in 2019, 11% more than in 2018. More than half are located in the Central District.

**88 %**

of homes for tourism use have 1 or 2 bedrooms

### Homes for tourism use\*

⬆️ = YEAR-ON-YEAR VARIATION



### AVERAGE PRICE PUBLISHED

**90.08**

€/NIGHT  
CENTRAL DISTRICT

**77.10**

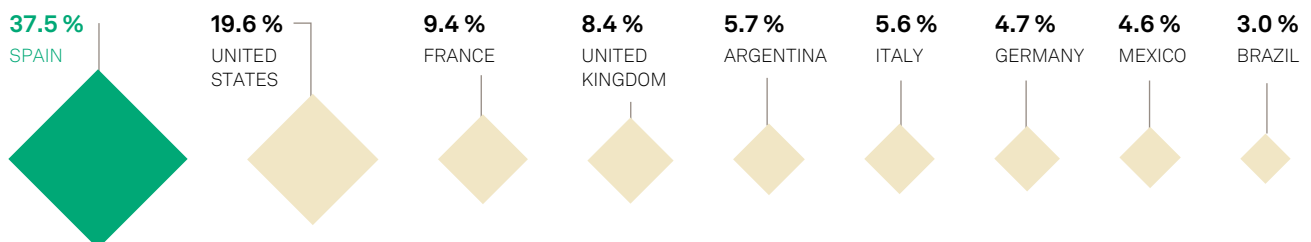
€/NIGHT  
REST OF THE CITY

### ESTIMATED HOMES PER NUMBER OF ROOMS



### COUNTRIES OF ORIGIN

% over total HTU users. Data from July 2018 to July 2019.



\*The data on homes for tourism use are not official City Hall of Madrid figures. They were provided by the specialist firm Transparent Intelligence.

Source: Transparent Intelligence (detailed information in "Research Notes").

# CONNECTIVITY

## Adolfo Suárez Madrid – Barajas Airport

Market share by geographic region

EUROPE	46.1%
SPAIN	27.1%
LATIN AMERICA	14.4%
NORTH AMERICA	5.4%
MIDDLE EAST	3%
AFRICA	2.7%
ASIA-PACIFIC	1.3%

5<sup>TH</sup> BUSIEST EUROPEAN AIRPORT BY PASSENGER VOLUME BEHIND LONDON, PARIS, AMSTERDAM AND FRANKFURT

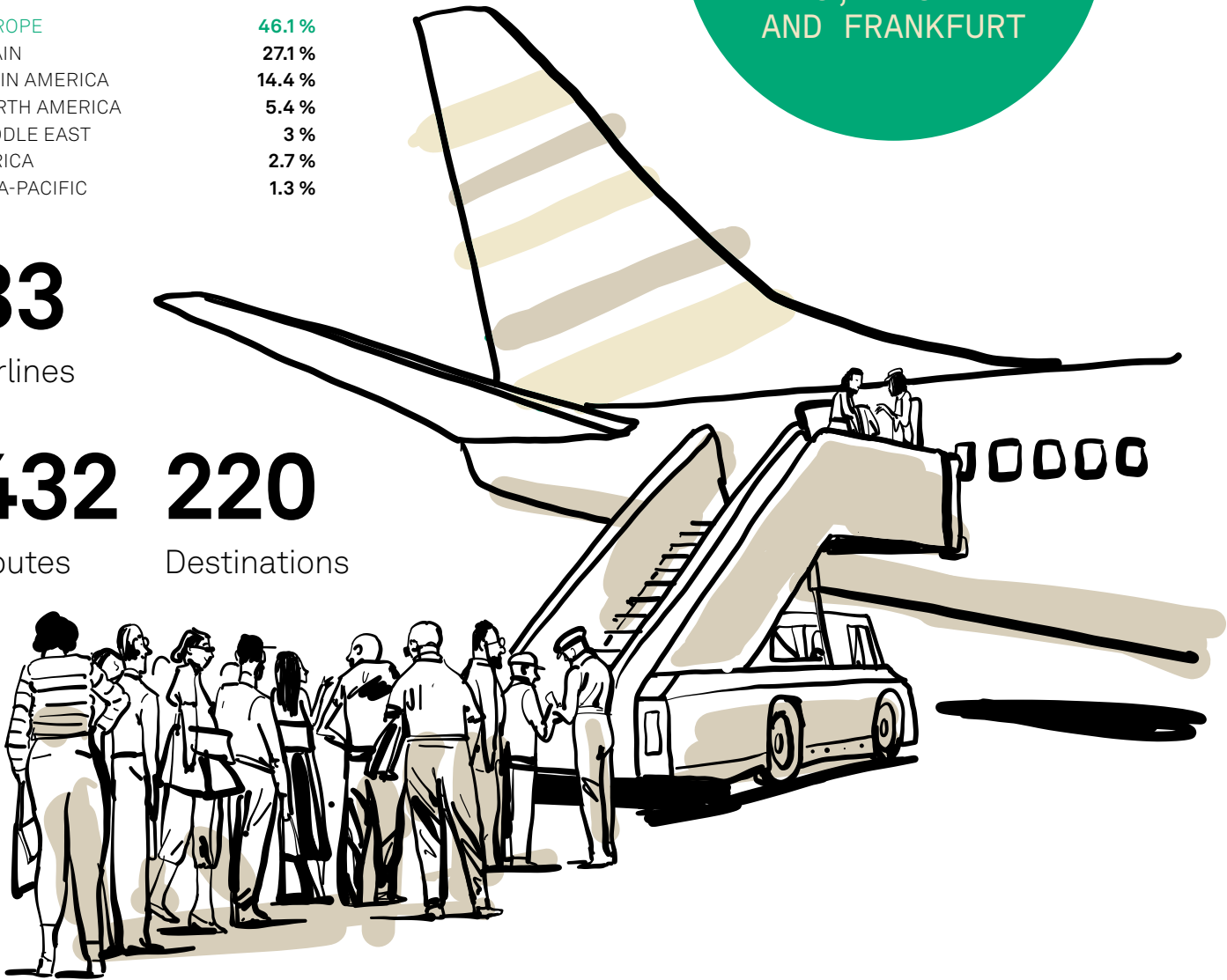
# 83

Airlines

# 432 220

Routes

Destinations



# 61.7 M

Passengers in 2019

## 16.7 M <sup>▲ 4.7%</sup>

PASSENGERS DOMESTIC FLIGHTS

## 16.5 M <sup>▲ 11.3%</sup>

PASSENGERS INTERCONTINENTAL FLIGHTS

## 28.5 M <sup>▲ 6.6%</sup>

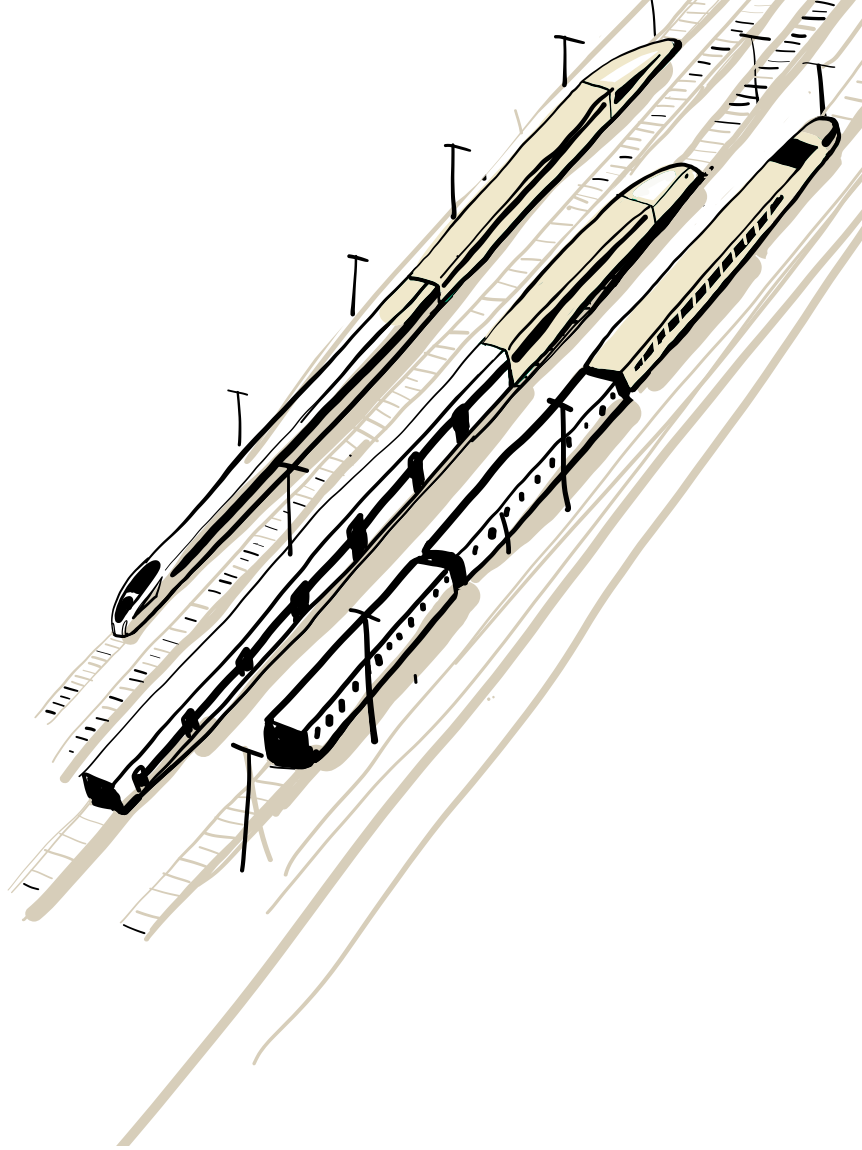
PASSENGERS EUROPEAN FLIGHTS

Source: AENA.

The connectivity of Madrid is one of the reasons it's such a competitive urban destination. The Adolfo Suárez Madrid-Barajas Airport once again broke records, with a total of 61.7 million passengers in 2019, a 6.6% increase over 2018. More than 45 million came from European and inter-continental flights. Madrid's airport ranks fifth in Europe in terms of passenger volume.

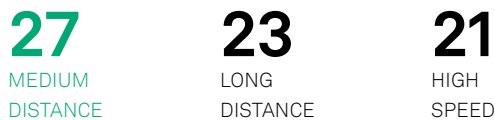
The city of Madrid is connected to 220 destinations and the Adolfo Suárez Madrid-Barajas Airport operates 83 airlines with more than 430 routes. By geographic regions, Europe, Spain and Latin America generate the highest market share. In 2019, five new destinations were opened in Europe, one in China and another in Brazil.

In terms of railway connectivity, in 2019 there were 21 provinces connected by high-speed trains and 23 connected by long-distance trains. Overall, passengers with arrival/departure in Madrid totalled 30.5 million. On the other hand, a total of 2 million bus tickets with origin/destination in Madrid were sold between January and December 2019.



## Train

### Connected provinces



### High speed / Long distance

STATION	TRAVELLERS	%
MADRID-PUERTA DE ATOCHA	<b>19.6 M</b>	<b>82 %</b>
MADRID-CHAMARTIN	<b>3.9 M</b>	<b>16 %</b>
MADRID-ATOCHA CERCANIAS	<b>0.5 M</b>	<b>2 %</b>
<b>TOTAL</b>	<b>24.1 M</b>	

## Bus

TICKETS WITH ORIGIN /  
DESTINATION MADRID

**2,051,713**

ORIGIN OF  
TRAVELLERS

**60 % NATIONAL**  
**40 % INTERNATIONAL**

### Total travellers

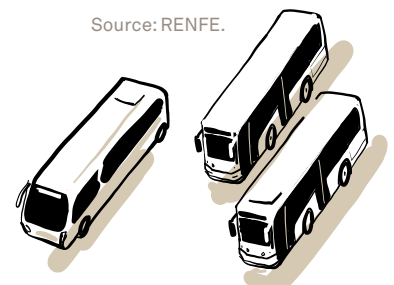
**30.5 M**

### Medium distance

STATION	TRAVELLERS	%
MADRID-PUERTA DE ATOCHA	<b>2.9 M</b>	<b>45 %</b>
MADRID-CHAMARTIN	<b>2.6 M</b>	<b>40 %</b>
MADRID-ATOCHA CERCANIAS	<b>0.7 M</b>	<b>10 %</b>
MADRID-PRINCIPE PIO	<b>0.3 M</b>	<b>5 %</b>
<b>TOTAL</b>	<b>6.4 M</b>	

### TOP 3 ROUTES

- 1. MALAGA - MADRID**
- 2. BARCELONA - MADRID**
- 3. GRANADA - MADRID**



Source: RENFE.

Source: Movelia.

# TOURIST SPENDING



In 2019, tourist spending by international visitors in the Community of Madrid followed an upward trend, with growth in the primary indicators. According to the INE's Tourist Spending Survey (EGATUR), international visitor expenditures totalled €10,451 in 2019, up 12.59% from the previous year. Meanwhile, average daily spending increased by 10.86% to €270. June recorded an average daily spending per person of €1,541, the highest of the year. For its part, December was the month with the greatest year-on-year variation, recording an average daily spending of €1,487, a 10% increase over 2018.

Madrid has seen an uptick in total tourist spending and average daily spending by international visitors since 2019. Total spending in 2015-2019 grew by 64%, indicating a sharp increase in tourist-related turnover.

64 %

increase in international tourist spending since 2015

According to a report obtained through a collaboration with Mastercard Data & Services, more than 60% of international spending in 2019 was comprised by the food, catering, accommodation, and fashion and shopping sectors. The highest average transactions correspond to fashion and shopping (€212), vehicle hires (€199) and technology.

[More information in Chapter 2 "Shopping tourism"].

11 %

INCREASE IN AVERAGE DAILY SPENDING PER PERSON

## Tourist spending international travellers

◆ = YEAR-ON-YEAR VARIATION

TOTAL

# 10,451

MILLION EUROS

▲ 12.6 %

AVERAGE PER PERSON

# 1,369

EUROS

▲ 5.5 %

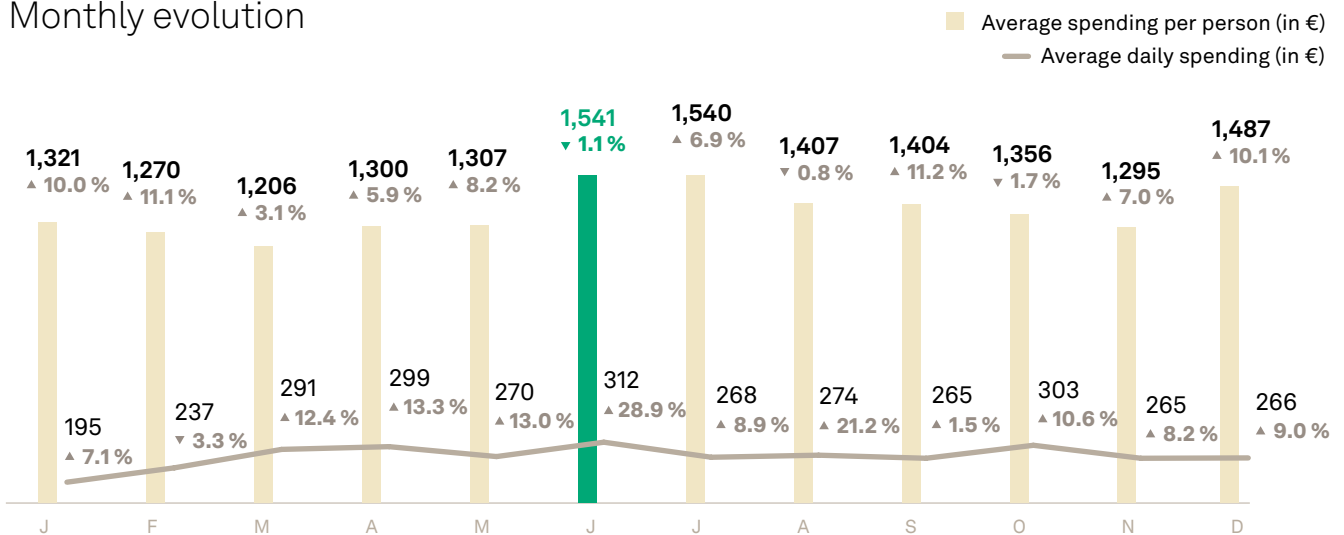
DAILY AVERAGE

# 270

EUROS

▲ 10.9 %

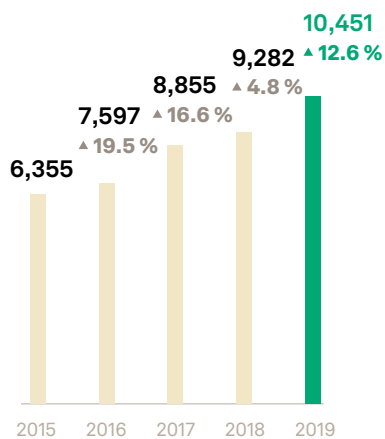
## Monthly evolution



## Annual evolution

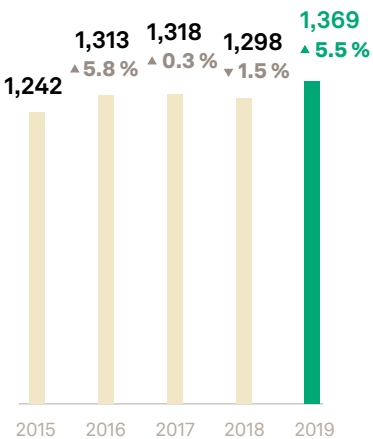
TOTAL

Millions of €



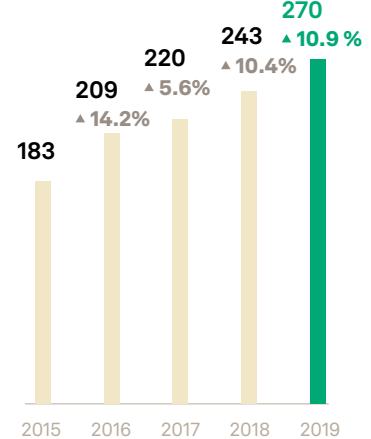
AVERAGE PER PERSON

In €



DAILY AVERAGE

In €



Source: Tourist Spending Survey (INE). Data from the Community of Madrid.

# MEETINGS TOURISM

## Madrid, at the forefront

The meetings-and-events sector remains one of the most stable markets and amongst those with the highest returns in Madrid, especially in terms of brand equity. In 2019, the city of Madrid was once again distinguished as “Europe’s Leading Meetings & Conferences Destination.” Additionally, the city was honoured as the “World’s Leading Meetings & Conferences Destination” by the 2019 World Travel Awards, marking a historical milestone for both the city of Madrid and Spain as a whole. In both cases, Madrid hopes to repeat its success in 2020.

Thanks to solid international marketing efforts, Madrid has an increasingly identifiable brand, especially in the area of conferences. Madrid was listed third as an international destination in the latest International Congress & Convention Association (ICCA) ranking.

With regard to marketing activities in 2019, of note is the creation of new work formats to enable international professionals to discover Madrid from new perspectives. One such example is the 2019 Madrid Agency Forum, which convened 25 European agencies in July.

Thanks to initiatives such as these and others like trade fairs and workshops, the city has hosted more than 20,000 events per year and achieved an economic impact of approximately €1 billion since 2017. In terms of the volume of visitors, Madrid’s meetings tourism accounts for 12% of the total.

### Main Congresses in 2019

- 29<sup>th</sup> International Congress of the European Respiratory Society (ERS): 22,000 delegates
- 20<sup>th</sup> Annual European League Against Rheumatism (EULAR) Congress: 14,000 delegates
- World ATM Congress: 8,200 delegates
- 28<sup>th</sup> International Congress of the European Academy of Dermatology and Venereology (EADV): 12,500 delegates

€920  
M

GENERATED  
BY THE MORE  
THAN 23,000  
MEETINGS HELD  
IN THE CITY

**THE POSITIVE  
RIPPLE  
EFFECT OF  
EVENTS:  
MADRID’S  
LEGACY  
STRATEGY**

There is a growing awareness in the tourism sector of the invaluable impact that congresses have on local communities in host cities by promoting a rich exchange of knowledge, in-house research, relocation of talent, academ-

ic research and new trade relations. In response to this growing market trend, Madrid has developed a pioneering legacy strategy to inspire congress and conference promoters to host events that make a positive impact on the city. In general, these events relate to social and environmental issues. Examples in 2019 include the European Respiratory Society Congress, which encouraged Madrid residents to adopt healthy lifestyle habits (Healthy Lungs for Life Campaign) and the first-aid training offered during the 4<sup>th</sup> European Emergency Medical Services Congress.

THE MEETINGS  
INDUSTRY HAS  
AN INVALUABLE  
IMPACT ON LOCAL  
COMMUNITIES

# MICE Tourism

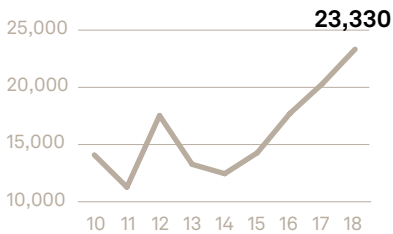
Data from January to December 2018

## TOTAL MEETINGS

Annual evolution

YEAR-ON-YEAR VARIATION 2017-2018

▲ 14.8 %

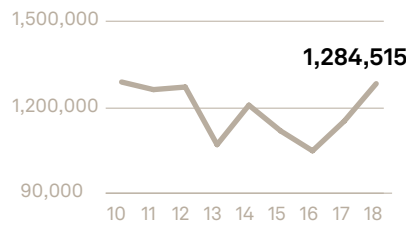


## TOTAL PARTICIPANTS

Annual evolution

YEAR-ON-YEAR VARIATION 2017-2018

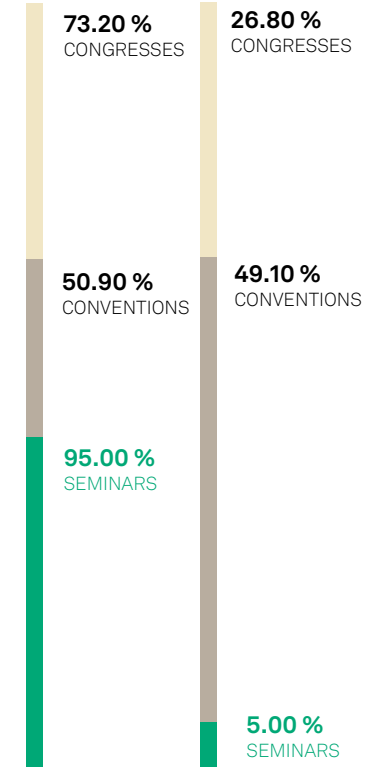
▲ 11.2 %



## ORIGIN OF PARTICIPANTS

SPAIN

OUTSIDE SPAIN



## TYPES OF MEETINGS

7,932  
(34 %)

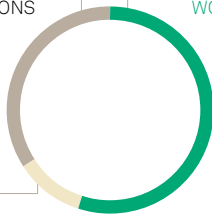
CONVENTIONS

12,832  
(55 %)

WORKSHOPS

2,566  
(11 %)

CONGRESSES



## TYPES OF PARTICIPANTS

423,890  
(33%)

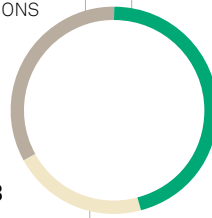
CONVENTIONS

590,877  
(46 %)

SEMINARS

269,748  
(21 %)

CONGRESSES



## TOTAL ECONOMIC IMPACT

# 919.6

MILLION EUROS

## IMPACT BY REVENUES

In millions of €

394.9

INSCRIPTIONS

261.7

MISC. SPENDING

218.7

ACCOMMODATION

44.3

TRAVEL  
COMPANION



## ASSESSMENT OF THE VENUE

from 0 to 10

# 8.1

## ASSESSMENT OF THE EVENT ORGANISATION

# 8.6

## ASSESSMENT OF THE CITY OF MADRID

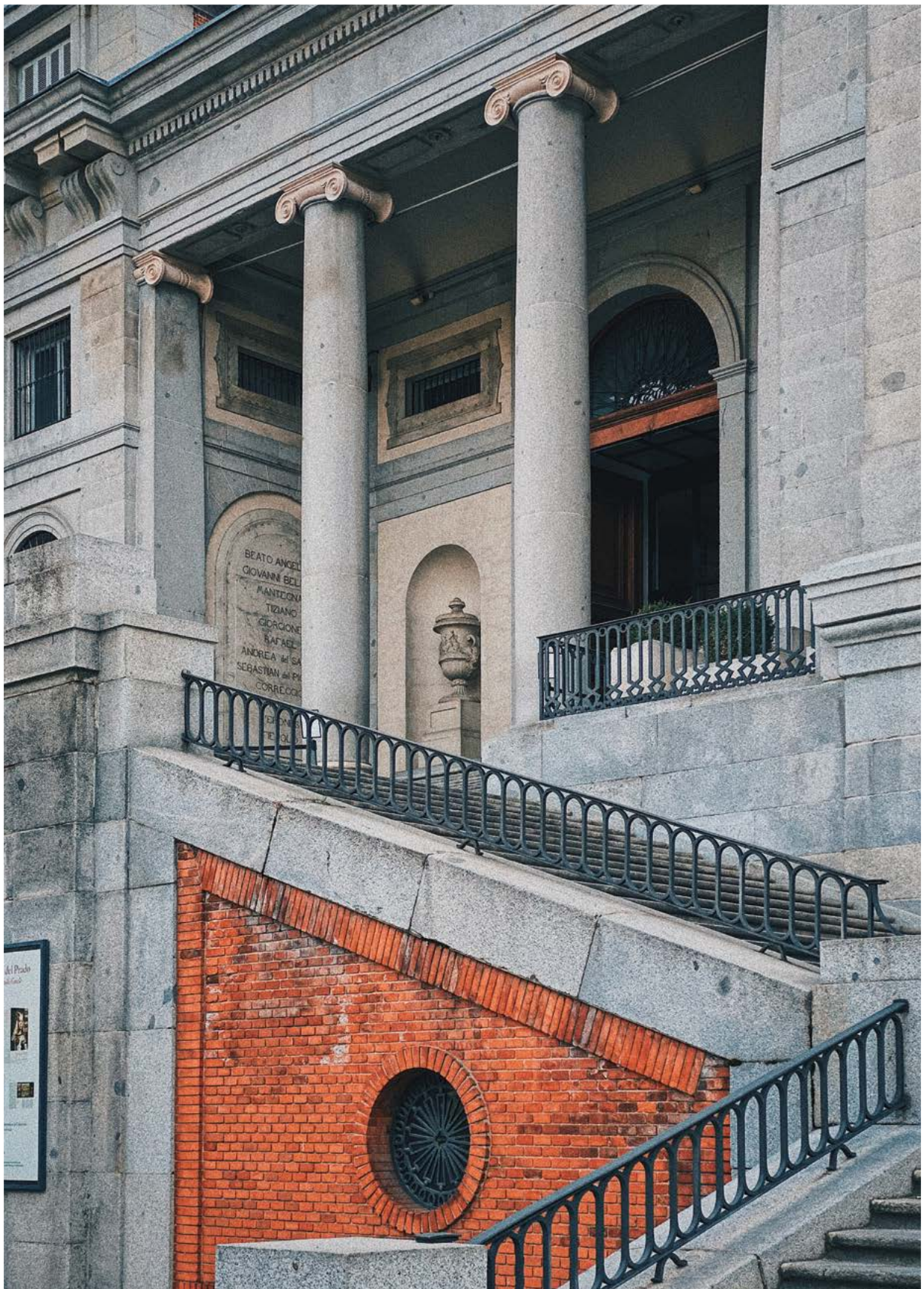
# 8.0

Source: Madrid Convention Bureau, 2018 data.

# 02

Madrid merges a broad array of experiences into a single destination. Its cultural legacy, leisure and culinary offering, connectivity and welcoming atmosphere have made it into a global benchmark for urban tourism. More than 80% of visitors surveyed said they would come to Madrid again.

→ Visitor  
experience



In a global context shaped by growing complexity and ever-evolving socioeconomic, cultural, technological and environmental change, Madrid has successfully positioned itself on the cutting edge of urban tourism trends. In fact, **more than 80% of visitors would return to the city of Madrid** according to the 2019 Tourism Perception Survey, which gathered feedback from over 1,600 visitors to Tourist Assistance and Information Services centres.

**3-5**

DAYS IS THE  
OPTIMAL AMOUNT  
OF TIME TO  
SPEND IN  
MADRID



**71%**

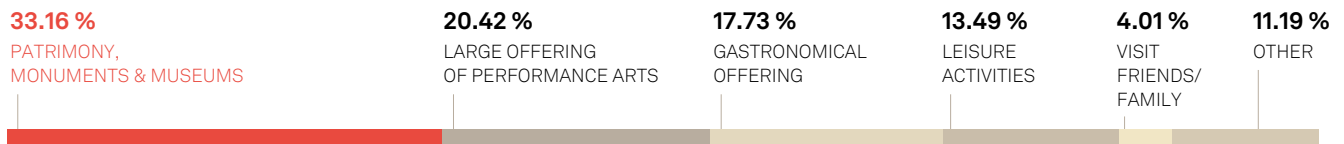
OF TRAVELLERS  
VISIT MADRID  
FOR ITS  
HISTORIC  
PATRIMONY,  
GASTRONOMY AND  
CULTURAL  
OFFERING

Madrid boasts an extensive commercial offering, interesting sociocultural and leisure activities and an impressive calendar of international events. In addition to its cultural patrimony – the main reason to visit Madrid – the city provides the backdrop for varied theatre and musical performances and culinary experiences. Also worth highlighting is Madrid’s communication and transportation infrastructure, which have made the city into an international reference point.

**The inviting character of Madrid’s residents stands out as one of its most distinguishing features.** According to the 2019 Tourism Perception Survey, for tourists, hospitality is the fourth most important factor in shaping the city’s image. Madrid’s patrimony and cultural heritage rank first.

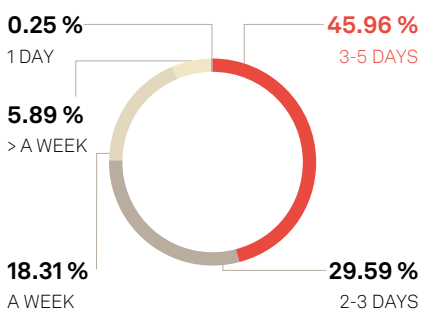
# THE MADRID EXPERIENCE

Main reasons for your visit to Madrid

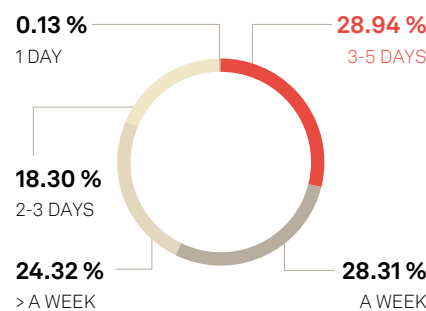


What's the optimal duration and season for a visit to Madrid?

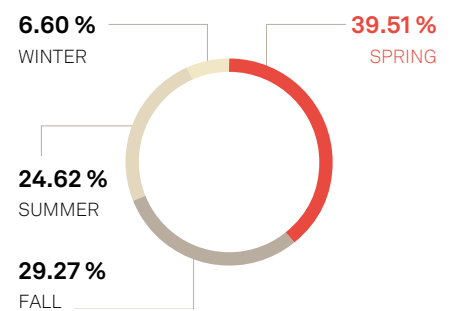
OPTIMAL AMOUNT OF TIME TO VISIT MADRID



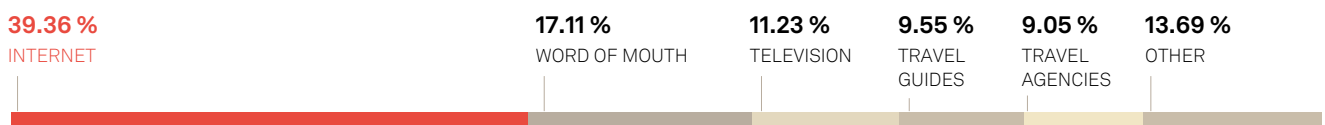
OPTIMAL AMOUNT OF TIME TO VISIT MADRID & SURROUNDING AREAS



WHAT'S THE BEST SEASON TO VISIT MADRID?



Which information channels did you use to prepare your trip?



# 97.64 %

of those surveyed associate the city's service offer with a middle-high purchasing power

What level of purchasing power reflects the city's service offer?



Source: 2019 Tourism Perception Survey from the Tourism Intelligence Centre of Madrid Destino.

# LEISURE AND ENTERTAINMENT



Madrid is a hub for leisure and entertainment, concerts and festivals, theatrical and musical performances. It's no surprise that respondents of the Tourism Perception Survey highlight Madrid's broad offering of performing arts (20% of respondents) and leisure offering (13%) amongst their main reasons for visiting the city.

According to the *2019 SGAE Annual Report* on dramatic, musical and audiovisual arts, in 2018 – the last year with official data – the Community of Madrid hosted 22,408 popular music concerts, making it the Spanish region with the most concerts.

Plays also represent an important tourism attraction, with Madrid offering the broadest portfolio in the country. Based on data from the *2019 SGAE Annual Report*, 15,704 plays ran in Madrid in 2018, representing 33.5% of the total national offer.

The musicals performed on Madrid's Gran Vía are a key differentiator. In 2019, roughly 1,630,000 spectators attended musicals in Madrid, underlining the sector's strength in Spain's capital city. According to the Association of Producers and Theatres of Madrid (APTEM), these productions collectively accrued €109.7 million in turnover.

MORE THAN 22,000 CONCERTS WERE HELD IN THE MADRID REGION ACCORDING TO THE 2019 SGAE ANNUAL REPORT

1.6M

SPECTATORS  
ATTENDED  
MUSICALS IN  
MADRID IN 2019

Some of these shows have become tourist draws in their own right, like *The Lion King*, now in its ninth season, with 3,500 performances and five million spectators since its 2011 debut. Another example is *Billy Elliot*, which celebrated its third season in 2019. To date, the show has given 800 performances before a total of 700,000 spectators.

+15,000

theatrical performances were  
registered in 2019

PARQUE  
WARNER MADRID  
IS AMONGST  
THE 20<sup>TH</sup> MOST  
VISITED PARKS  
IN EUROPE

Yet there's much more in Madrid's leisure and entertainment offering. The global leisure-park operator Parques Reunidos (Madrid Amusement Park, Zoo Aquarium, Faunia, Atlantis Aquarium and Parque Warner Madrid) recorded a 13.1% increase in visitors in the first quarter of 2019. Attracting 2.1 million visitors in 2018, Parque Warner Madrid is amongst the 20 most visited parks in Europe.

THE NEXT  
DESTINATION  
IS STILL AN  
ENIGMA

Entertainment options change over time. The rise of escape rooms in urban areas is leading to a new way to travel: tourism aimed at solving enigmas. As *National Geographic* magazine pointed out in October 2019, "There's a new generation of escape-room connoisseurs. Not content with those in their home cities, they want to see the world." Madrid is home to more than 200 rooms according to the publication.

Did your experience in Madrid live up to your expectations?

1 - TOTALLY DISAGREE | 5 - TOTALLY AGREE

**SAFETY & CLEANLINESS**

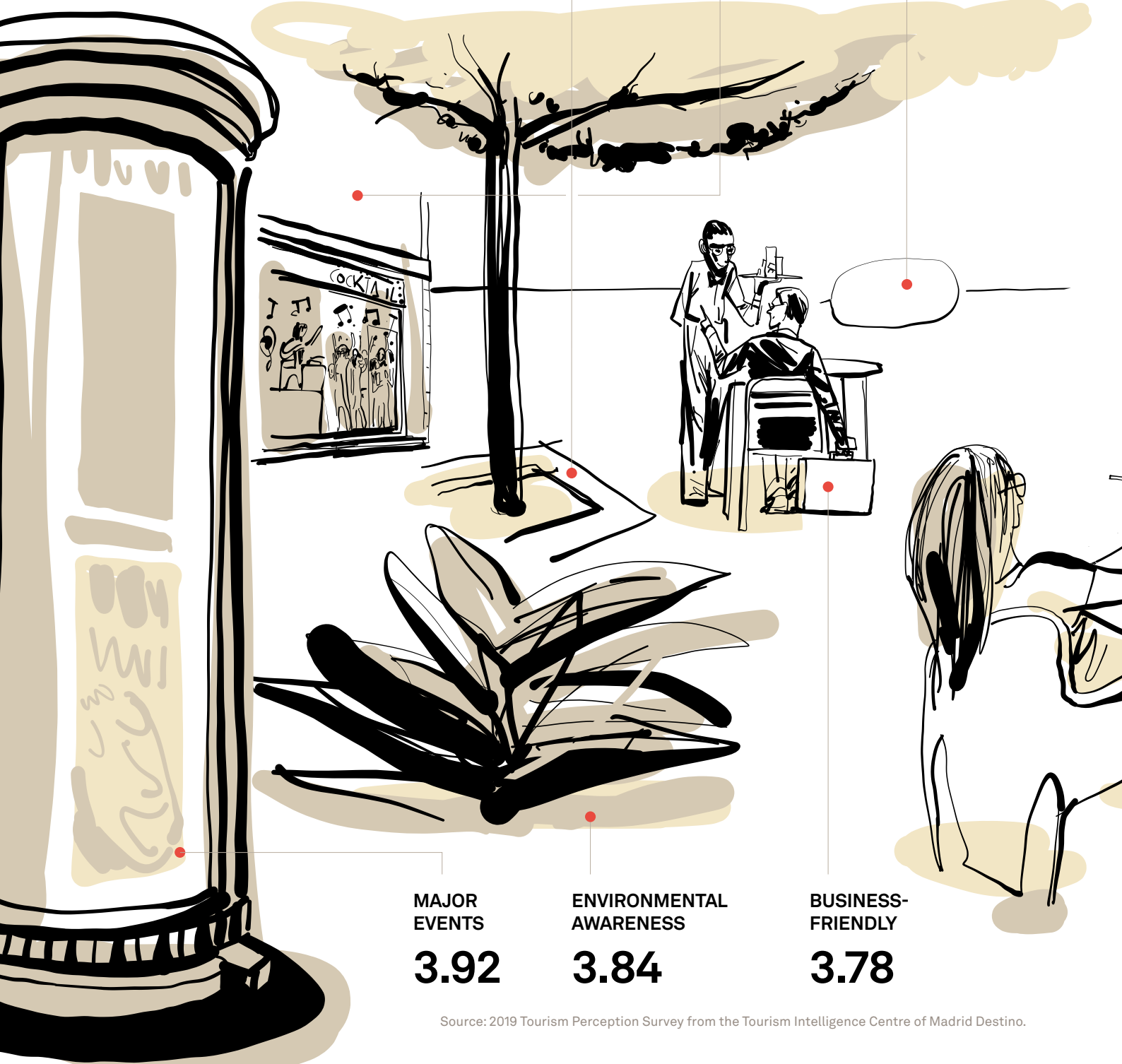
**3.77**

**NIGHTTIME LEISURE OFFERING**

**3.89**

**COMMUNICATIONS IN ENGLISH**

**3.83**



**MAJOR EVENTS**

**3.92**

**ENVIRONMENTAL AWARENESS**

**3.84**

**BUSINESS-FRIENDLY**

**3.78**

Source: 2019 Tourism Perception Survey from the Tourism Intelligence Centre of Madrid Destino.

OPEN & FRIENDLY  
PEOPLE

4.12

CITY WITH  
GREAT FOOD

4.04

TRANSPORTATION  
SYSTEM

4.03

PATRIMONY &  
CULTURAL AGENDA

4.2



HOSPITALITY,  
CULTURAL AGENDA,  
GASTRONOMY &  
TRANSPORTATION  
ARE THE CITY'S  
MOST VALUED  
ATTRIBUTES

GOOD PRICE-QUALITY  
RELATIONSHIP

3.89

FASHION & SHOPPING  
OFFERING

3.96

CHILD-FRIENDLY  
CITY

3.75



# CULTURAL PATRIMONY



## MADRID'S UNPARALLELED TRIANGLE OF ART

Madrid's well-known *Triangle* or *Avenue of Art* broke visitor records in 2019. In its bicentenary, the Prado Museum observed a 10% increase in the number of visitors compared to 2018. And the volume of visitors was even higher in the Reina Sofía Museum and Thyssen-Bornemisza Museum.

### Visitors in 2019

◆ = YEAR-ON-YEAR VARIATION

**4,425,699** ▲ 13.5 %  
REINA SOFIA  
NATIONAL ART MUSEUM

**3,203,417** ▲ 10.7 %  
PRADO NATIONAL  
MUSEUM

**1,547,967** ▼ 0.3 %  
ROYAL PALACE

**1,034,941** ▲ 14.1 %  
THYSSEN-BORNEMISZA  
NATIONAL MUSEUM

**499,300** ▼ 3.2 %  
ARCHAEOLOGICAL  
MUSEUM

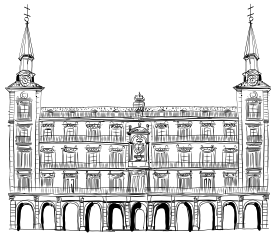
**+10%**  
INCREASE IN  
VISITORS  
DURING THE  
PRADO MUSEUM'S  
BICENTENARY

Patrimony, monuments and museums have become the primary motivating factors to visit Madrid according to 33.6% of respondents of the Tourism Perception Survey. Altogether, the city has 1,800 monuments, 200 historical buildings and 70 museums. When it comes to assessing the visitor experience once in Madrid, the city's patrimony and cultural agenda received the highest marks, exceeding travellers' expectations.

In addition to its most renowned museums, Madrid also boasts emblematic spaces like the Liria Palace, opened to the public in September 2019, and the Royal Palace's Museum of Royal Collections. Expected to open in 2020, the museum will showcase paintings, sculptures, tapestries and carriages treasured by various kings throughout Spain's history.

## Which Madrid icons were you familiar with?

Of the 1,619 visitors interviewed at the city's Visitor Services sites, nearly 65% were familiar with the Plaza Mayor before arriving to the city. It's Madrid's flagship icon, followed by the Puerta del Sol and the Prado Museum.



PLAZA MAYOR

64.71 %



PUERTA DEL SOL

63.98 %



PRADO MUSEUM

59.12 %



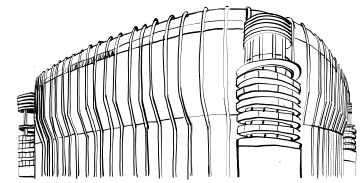
ROYAL PALACE

52.26 %

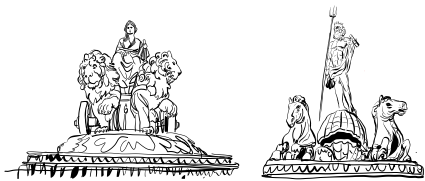


PUERTA DE ALCALÁ

49.73 %

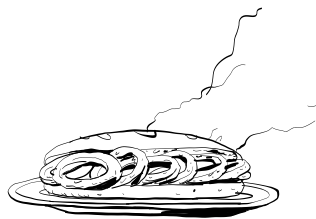
SANTIAGO BERNABÉU  
STADIUM

48.93 %



CIBELES / NEPTUNO

36.88 %



CALAMARI SANDWICHES

35.62 %



KILOMETRE 0

29.63 %

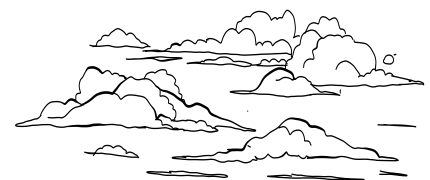


GRAN VÍA

27.30 %

THE BEAR &  
THE STRAWBERRY TREE

21.64 %



MADRID SKY

12.32 %

Source: 2019 Tourism Perception Survey from the Tourism Intelligence Centre of Madrid Destino.

# GASTRONOMICAL TOURISM

In Madrid, traditional markets, centuries-old establishments and the most modern and original restaurants live side by side. At the same time, the city offers a diverse gastronomic scene, from the most authentic Madrid-based and Spanish cuisine to the latest global trends and avant-garde culinary creations. Without a doubt, the city's gastronomy has become one of the main reasons behind its privileged position as an acclaimed tourist destination. The 2019 Tourism Perception Survey underscores this fact: Madrid's gastronomic and restaurant offering are the third most important reason for visiting the city.



GASTROFESTIVAL  
INCLUDED 400  
PARTICIPATING  
ESTABLISHMENTS  
& INSTITUTIONS

There are 47 municipal markets operating in the city, of which, 16 are gastronomic markets. These singular spaces offer both high-quality products as well as culinary experiences, with examples such as the Markets of San Fernando, San Antón, Vallehermoso and San Miguel, which welcomes more than 10 million visitors every year according to data provided by its owner company (Redevco). At the same time, the city also offers culinary sites where visitors can enjoy higher-end, gourmet experiences, such as Platea and the San Delfonso Market.

Based on a 2019 report by Hostelería Madrid, Tripadvisor and The Fork, there are a total of 31,398 bars and restaurants in the Community of Madrid, 30% of which are restaurants. Traf-

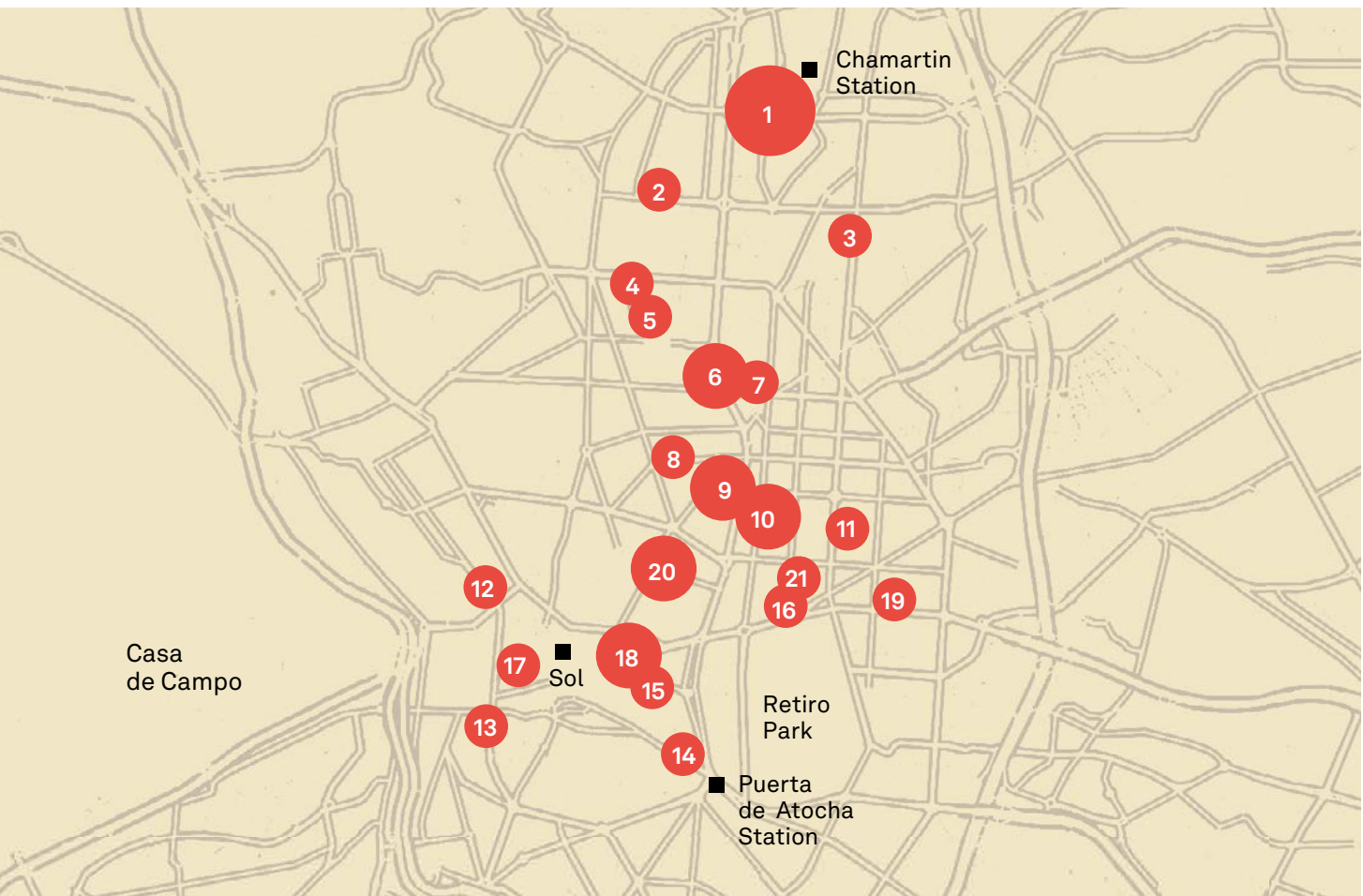
fic data from the Tripadvisor platform indicate travellers' ever-increasing interest in visiting Madrid, as evidenced by a 9.6% increase in page visits on Madrid-related content in 2019 compared to 2018.

Gastronomic events have also gained traction. Madrid Fusion (13,000 participants) is the fifth most recognised event by visitors. Meanwhile, Gastrofestival celebrated its 10<sup>th</sup> edition in 2019, attracting 450 companies and public- and private-sector institutions.

The Michelin Guide once again recognised the innovation and creativity of Madrid's gastronomic offering. In 2019, there were 21 Michelin-starred restaurants in the capital city.

**10 M**

VISITORS A  
YEAR INCLUDE  
A STOP AT THE  
SAN MIGUEL  
MARKET

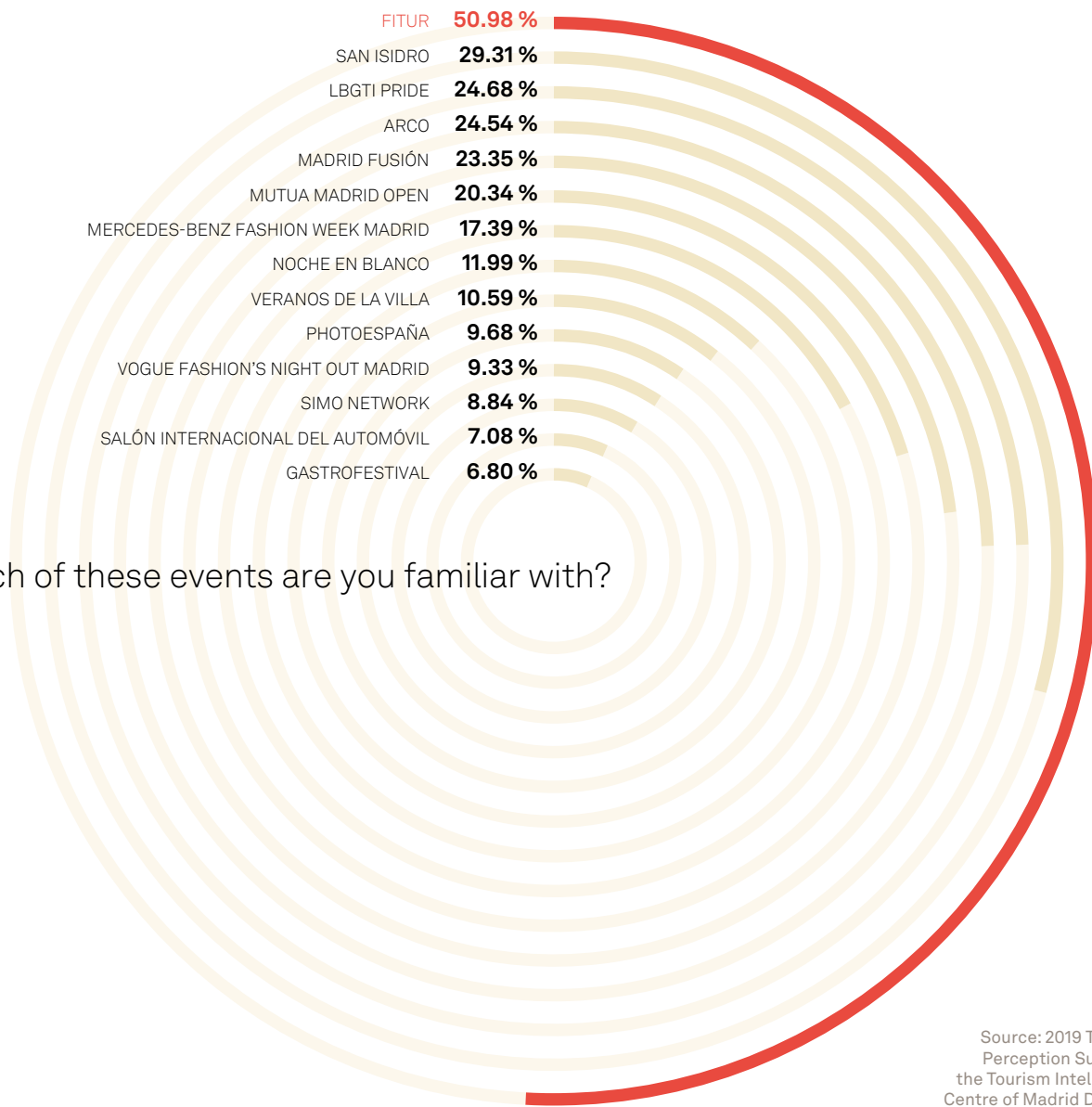


## Michelin-starred restaurants in Madrid

- |   |  |  |   |   |  |
|---|--|--|---|---|--|
| <p><b>1</b><br/><b>DIVERXO</b><br/>DABIZ MUÑOZ<br/>★★★<br/>NH EUROBUILDING,<br/>Padre Damián, 23</p>    | <p><b>2</b><br/><b>KABUKI</b><br/>RICARDO SANZ<br/>★<br/>Avda. Presidente<br/>Carmona, 2</p> | <p><b>3</b><br/><b>GYTÁN</b><br/>JAVIER ARANDA<br/>★<br/>c/ Príncipe de<br/>Vergara, 205</p> | <p><b>4</b><br/><b>CLOS MADRID</b><br/>MARCOS GRANDA<br/>★<br/>c/ Raimundo Fdez.<br/>Villaverde, 28</p> | <p><b>5</b><br/><b>EL INVERNADERO</b><br/>RGO. DE LA CALLE<br/>★<br/>c/ Ponzano, 85</p>       | <p><b>6</b><br/><b>SANTCELONI</b><br/>OSCAR VELASCO<br/>★★<br/>P.º de la<br/>Castellana, 57</p>    |
| <p><b>7</b><br/><b>A'BARRA</b><br/>JOSÉ GÓMEZ<br/>★<br/>c/ del Pinar, 15</p>                            | <p><b>8</b><br/><b>LÚA</b><br/>MANUEL DOMÍNGUEZ<br/>★<br/>P.º Eduardo Dato, 5</p>            | <p><b>9</b><br/><b>COQUE</b><br/>HNOS. SANDOVAL<br/>★★<br/>c/ Marqs. de Riscal, 11</p>       | <p><b>10</b><br/><b>RAMÓN FREIXA</b><br/>RAMÓN FREIXA<br/>★★<br/>c/ Claudio Coello, 67</p>              | <p><b>11</b><br/><b>PUNTO MX</b><br/>ROBERTO RUIZ<br/>★<br/>Gral. Pardiñas, 40</p>            | <p><b>12</b><br/><b>EL CLUB ALLARD</b><br/>J. C. FUENTES<br/>★<br/>c/ de Ferraz, 2</p>             |
| <p><b>13</b><br/><b>EL CORRAL DE<br/>LA MORERÍA</b><br/>DAVID GARCÍA<br/>★<br/>c/ de la Morería, 17</p> | <p><b>14</b><br/><b>YUGO THE<br/>BUNKER</b><br/>JULIÁN MÁRMOL<br/>★<br/>c/ San Blas, 4</p>   | <p><b>15</b><br/><b>CEBO</b><br/>AURELIO MORALES<br/>★<br/>Crr.ª de San<br/>Jerónimo, 34</p> | <p><b>16</b><br/><b>KABUKI<br/>WELLINGTON</b><br/>RICARDO SANZ<br/>★<br/>c/ Velázquez, 6</p>            | <p><b>17</b><br/><b>LA CANDELA<br/>RESTÓ</b><br/>SAMI ALÍ<br/>★<br/>c/ De la Amnistía, 10</p> | <p><b>18</b><br/><b>PACO RONCERO<br/>RESTAURANTE</b><br/>PACO RONCERO<br/>★★<br/>c/ Alcalá, 15</p> |
| <p><b>19</b><br/><b>LA TASQUERÍA</b><br/>JAVI ESTEVEZ<br/>★<br/>c/ Duq. de Sesto, 48</p>                | <p><b>20</b><br/><b>DSTAGE</b><br/>DIEGO GUERRERO<br/>★★<br/>c/ Regueros, 8</p>              | <p><b>21</b><br/><b>ÁLBORA</b><br/>AGUSTÍN GONZÁLEZ<br/>★<br/>c/ Jorge Juan, 33</p>          |   |   |  |

Source: Prepared by the authors.

# MAJOR EVENTS



Which of these events are you familiar with?

Source: 2019 Tourism Perception Survey of the Tourism Intelligence Centre of Madrid Destino.

Major sports, festival and musical events are attracting a greater number of visitors each year, currently ranking as the fifth most important factor when it comes to positioning the city of Madrid in the minds of potential travellers. When shown a list of the city's major events, travellers most often recognise FITUR, the San Isidro festival and LGBTI Pride.

In recent years, Madrid has attracted numerous new national and international events. A key highlight in 2019 was the music festival Mad Cool. Since its launch four years ago, the

event has brought together more than 663,000 attendees reflecting 86 different nationalities and generating €174 million in terms of economic impact on the city, according to the consultancy PwC.

With regard to sport events, amongst the most notable in 2019 was the UEFA Champions League final, held in Madrid's Wanda Metropolitano between Tottenham Hotspur and Liverpool on 1 June. Hotel occupancy was 95% and estimated revenues reached €18 million in bars and restaurants.

THE FITUR FAIR, THE SAN ISIDRO FESTIVAL AND LGBTI PRIDE ARE THE MOST WELL-KNOWN EVENTS

In addition to Europe's most important football final, the city also hosted other internationally recognised events including the Mutua Madrid Open, the Davis Cup tennis tournaments and the Madrid Marathon.

**Direct economic impact:**

- UEFA Champions League Final: €60M
- Mutua Madrid Open: €100M
- Madrid Marathon: €4M

Source: Confederación Empresarial de Madrid, Instituto de Estudios Turísticos and Universidad Europea de Madrid.

THE UEFA  
CHAMPIONS LEAGUE  
HAD AN ECONOMIC  
IMPACT OF €60  
MILLION

## ACADEMIC TOURISM



Madrid and its environs have the greatest concentration of higher-education offerings in Spain, with six public and eight private universities. According to the study *Data and Figures of the Spanish University System*, carried out by the Ministry of Science, Innovation and Universities (the most recent with official data), the number of international students in Spain during the 2017-2018 academic year climbed to 126,670. Of these students, almost 25% (30,135) studied in the Community of Madrid. Madrid is the community with the most international students enrolled in undergraduate and post-graduate education, with 16,304 and 9,994, respectively.

Academic tourism can be directly linked with the number of tourists who decide to stay in the homes of family or friends. According to the INE, from January to November 2019, 16.91% of international tourists chose to stay in the homes of families or friends in the Community of Madrid.

**30,135**

international students

# SHOPPING TOURISM



Madrid is a shopping destination where luxury, great brands, alternative fashion houses and quality local artisans commingle. According to a report on international visitors in Madrid, obtained through a collaboration with Mastercard, “fashion and shopping” is the top sales category (25.6%), with the highest average transaction at €212.

Outbound markets of China, the U.S. and the U.K. make up 35% of international spending. Chinese visitors register the highest average spending (€116), although in terms of volume of transactions, the British hold first place at 20%. The centre of Madrid attracts the greatest volume of international spending, followed by the districts of Salamanca, Chamartín and Barajas, according to distribution data.

In terms of tax-free sales made by non-EU visitors, and according to data provided by the international payment services firm Planet Intelligence, the average cost per transaction in Madrid amounts to €348. By nationality, the Chinese outbound market holds the top spot (21% of the total) with the highest average transaction (€825).

The U.S. follows with 10% of the total and an average transaction of €513. The five following places correspond to the LATAM market, which reflects 30% of tax-free sales in Madrid. The highest volume of sales takes place in the Salamanca neighbourhood (39% of the total).

THE SALAMANCA DISTRICT GENERATES THE HIGHEST AVERAGE TRANSACTION: €230

**26 %**

OF INTERNATIONAL TOURIST SPENDING IS ON FASHION AND SHOPPING

## International visitor spending



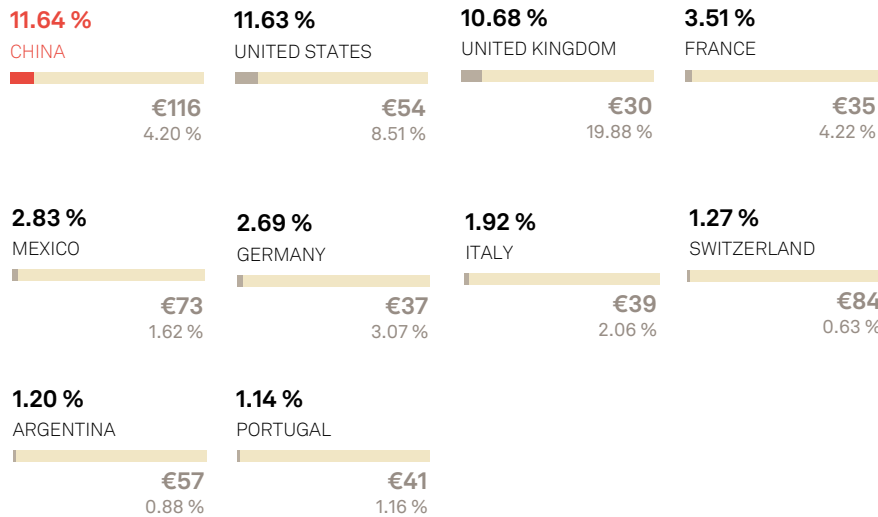
### OUTBOUND MARKETS BY SPENDING

#### % spending by country

COUNTRY

Average transaction amount

% of transaction of total payments



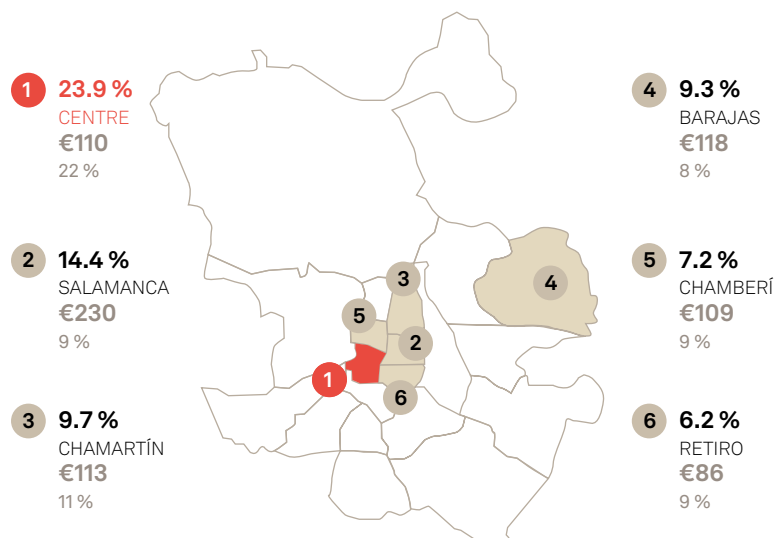
### DISTRICTS WITH HIGHEST SPENDING

#### % spending by district

DISTRICT

Average transaction amount

% of transaction of total payments



Data obtained through a collaboration with Mastercard.

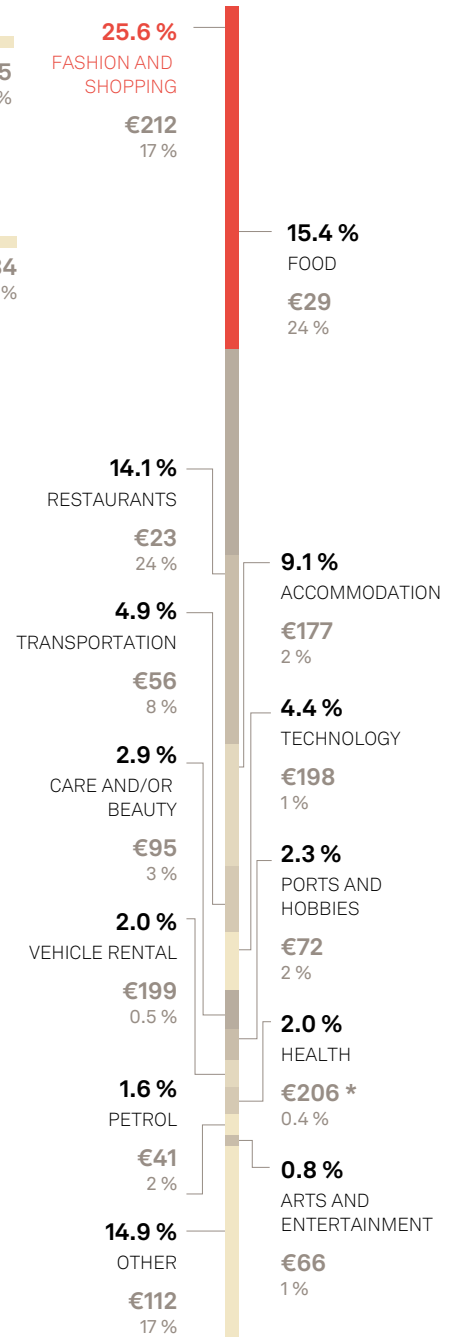
### WHAT DO INTERNATIONAL VISITORS BUY?

#### % spending by industry

COUNTRY

Average transaction amount

% of transaction of total payments



\* The figure in the "Health" category is slightly elevated, most likely because tourists do not have private medical insurance.

# VISITOR SERVICES



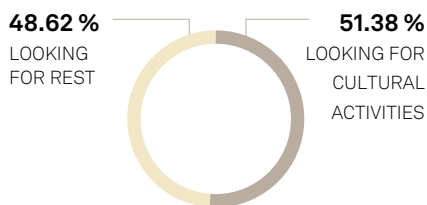
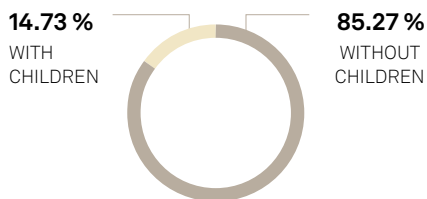
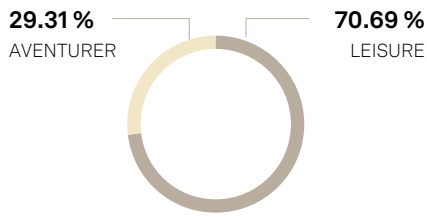
**65 %**  
OF VISITORS  
WHO REQUESTED  
INFORMATION ARE  
INTERNATIONAL

The city of Madrid's Tourist Assistance and Information Services (SAIT) includes a centre and nine tourist information points, which served 2,051,089 visitors in 2019. Of these, 65% were international travellers. Those from France used this service most, followed by the United States, Italy, Argentina and Germany.

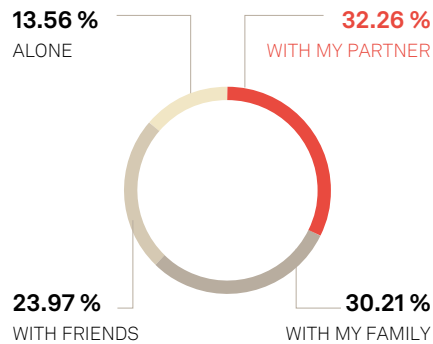
In 2019, the SAIT renewed its "Q of Tourism Quality" certification, with a total score of 9.5, following the UNE Standard 14785:2015 of April 2015. It marked the ninth year that the Institute of Quality Tourism of Spain (ICTE) has renewed its certification of the Madrid's SAIT.

IN 2019,  
THE CITY OF  
MADRID'S SAIT  
SERVED MORE  
THAN 2 MILLION  
TRAVELLERS

## What types of tourists came to Madrid?



## How did they travel?

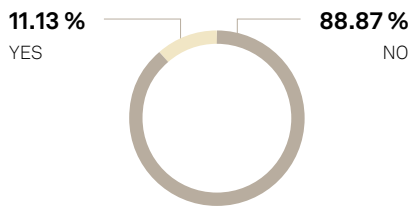


# 80.15 %

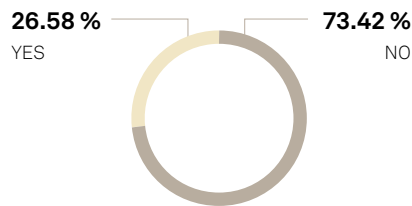
of tourists surveyed would visit the city again

## Tourist loyalty

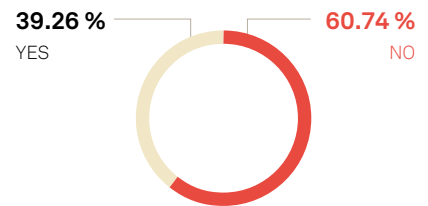
IS THIS YOUR FIRST TIME IN EUROPE?



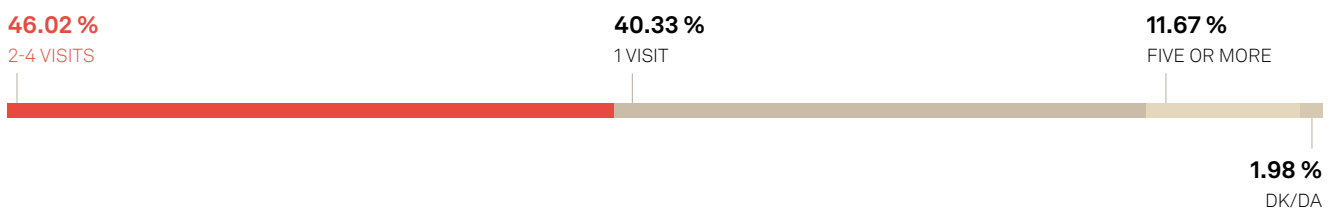
IS THIS YOUR FIRST TIME IN SPAIN?



IS THIS YOUR FIRST TIME IN MADRID?



HOW MANY TIMES HAVE YOU VISITED MADRID?



Source: 2019 Tourism Perception Survey by the Tourism Intelligence Centre of Madrid Destino.

# 03

In the current context of climate change and digital transformation, we must act responsibly in order to manage unlimited growth in urban tourism. The city of Madrid pursues a path toward quality and sustainable tourism.

→ 2020  
trends and  
forecasts



According to the 2020 World Tourism Barometer of the World Tourism Organization, international tourist arrivals grew 4% globally in 2019, rising to 1.5 billion tourists. The year 2019 marked the 10<sup>th</sup> consecutive year of growth, demonstrating the strength of the tourist industry on a global level.

Despite growth across every region, the tourism sector slowed in 2019 compared to 2017 and 2018 as a result of collapse of the British group Thomas Cook, uncertainty surrounding Brexit, global economic deceleration, and geopolitical and social tensions. At the time of writing this report, the consequences of the COVID-19 on the tourism sector had not been officially evaluated and will undoubtedly affect the WTO's growth forecasts for 2020.



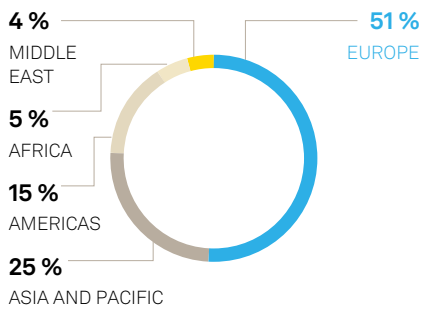
WORLDWIDE  
TOURISM  
REGISTERED  
1.5 BILLION  
TRAVELLERS  
IN 2019

Responsibly managing tourism growth is essential to ensure the sector can increasingly contribute to the socioeconomic development of local communities. In absolute terms, Europe received 743 million international tourists, maintaining world leadership and representing 51% of the global market, although its year-on-year growth (+4%) is lower than in previous years. According to data from the National Statistics Institute (INE), Spain received 83.7 million international tourists (+ 1.2% compared to 2018). **This figure places our country in second place in the world ranking, behind only France, which received 89.4 million international tourists.**

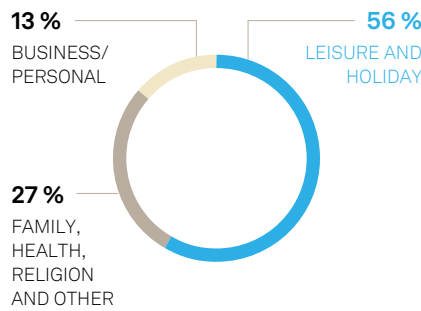
The city of Madrid, with 10,419,709 travellers in 2019, is positioned as a solid international destination. Air connectivity data provided by AENA reflect this: of the 213,189 arrivals to the Adolfo Suárez Madrid-Barajas Airport in 2019 – 4% more than in 2018 – 143,868 followed international routes, representing 67% of the total.

# GLOBAL TOURISM BY THE NUMBERS

## Destination

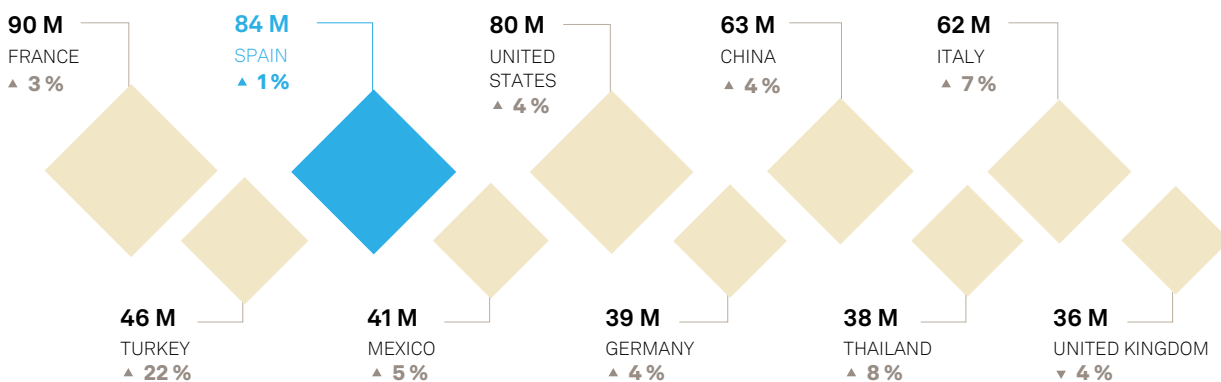


## Reason for trip

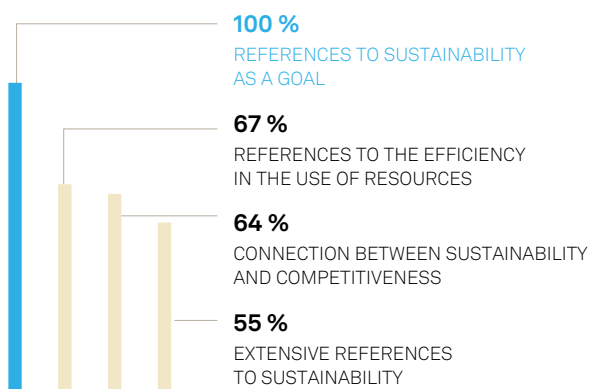


## World tourism ranking

◆ = YEAR-ON-YEAR VARIATION



## How does sustainability emerge in tourism policies?



# 743 M

tourists travelled to Europe in 2019

# 10.4 M

travellers chose Madrid as a destination (54.8 % were international)

Source: Baseline Report on the integration of sustainable consumption and production patterns into tourism policies, World Tourism Organization (WTO).

# GLOBAL TRENDS OF THE TOURIST SYSTEM



## 01. Asian market boom continues

The Asia-Pacific region registered year-on-year growth of 6.2% in 2018 compared to the previous year, placing it third amongst outbound regions with the highest year-on-year growth. The region ranked only behind the Middle East (+10.2%) and Africa (+7.1%), according to data from the World Tourism Organization (WTO). In absolute terms, Asia-Pacific ranked as the second most important outbound region with 358.7 million travellers, behind only Europe, with 672.3 million.

To provide some context, however, in 2019, airline reservations in Asia and the Pacific with destinations to other global regions grew by 8%, making it the first outbound region in the world, according to the 2020 Edition of the World Tourism Barometer.

The sustained growth of outbound tourism in this region in the last four years has also been reflected in the number of travellers to the city of Madrid. According to the INE, China ranks second amongst outbound markets to Madrid with the greatest growth in 2019. Chinese tourism to the city increased by 17% to more than 198,000 travellers, behind only the U.S., which grew by 19% over 2018 and registered 809,490 travellers. Based on these figures, China clearly represents a strategic market for Madrid. To this end, the City of Madrid Film Office has worked to support the production of Chinese television projects: the travel programme *Spain Passion* and the reality celebrity show *My Dearest Ladies* demonstrate a growing interest amongst the Asian public in Madrid.

According to data from the European Commission, China was the fastest growing market worldwide, mainly due to the expanding middle-class population, ease of visa processing and increase in airline connections.

[At the close of this edition, the consequences of the expansion of COVID-19 in the tourism sector had not been officially evaluated].

# 359

MILLION TRAVELLERS FROM ASIA-PACIFIC, PLACING IT SECOND AMONGST OUTBOUND REGIONS IN ABSOLUTE TERMS

CHINA RANKS SECOND AMONGST OUTBOUND MARKETS TO MADRID WITH GREATEST GROWTH

55 %

OF GENERATION  
Z WANTS TO  
VISIT AT  
LEAST THREE  
CONTINENTS  
OVER THE NEXT  
DECADE

## 02. Sustainable development and climate change

Tourism companies and destinations will be forced to adapt their strategies and procedures to the demands of climate change and the Sustainable Development Goals (SDGs) of Agenda 2030. The UN Conference on Climate Change-COP25, held in Madrid (December 2019), highlighted proposals from tourism companies to address climate change and tourists' growing awareness of responsible consumption.

The hotel sector is carrying out initiatives such as eliminating single-dose packaging for bathroom

items in hotels in order to reduce plastic consumption. Increased scrutiny of the airline industry's large carbon footprint has also led to advancements, including mobile boarding passes, more efficient aircraft and greater use of renewable energy.

The overall trend in tourism demand is characterised by greater social and environmental responsibility. In this context, the travel sector must also strive to reduce its environmental impact, especially in light of the intentions of Generation Z (people born between 1994 and 2010) to travel more than previous generations. According to a 2019 Booking.com study, 85% of Gen Zers have a "bucket list" of destinations to visit and 55% want to tour at least three continents over the next decade.

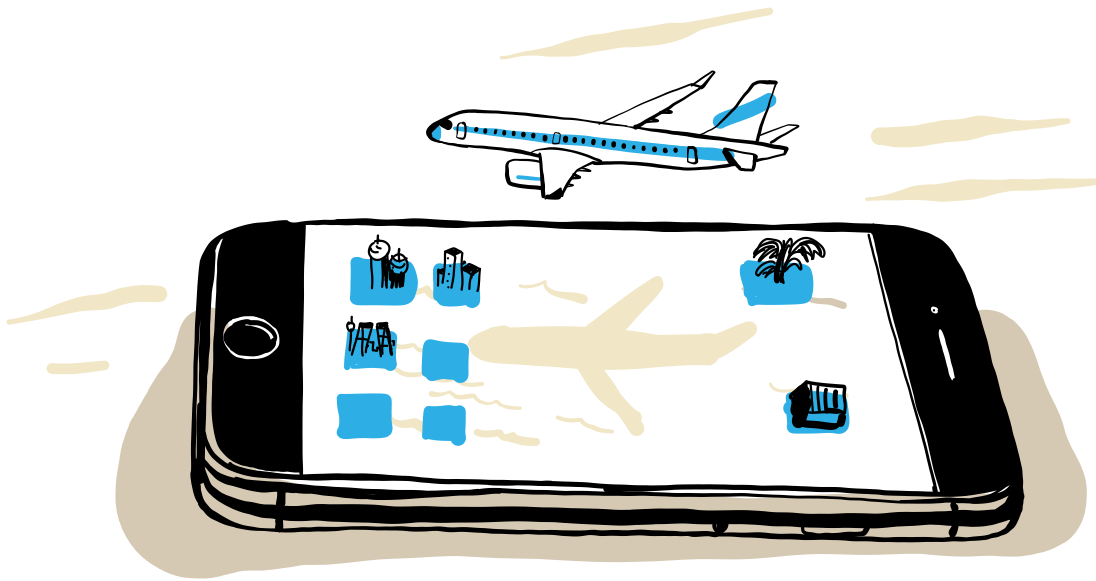
### HOW GENERATION Z TRAVELS

In 2019, the travel portal and search engine Booking.com led a study on Generation Z's reasons to travel. Results showed that 67% are very enthusiastic about the destinations they will visit in the future. In addition, 78% prefer to invest their money in tourism products, ahead of saving to buy housing.

At the same time, 60% are seeking to use means of transportation that are more respectful of the environment once they reach their destination. The digital ecosystem represents an important source of inspiration for Generation Z, with 45% trusting the recommendations of someone they don't personally know, such as influencers and celebrities, when making travel decisions.

78% OF  
YOUNG PEOPLE  
PREFER TO  
INVEST IN  
TOURISM THAN  
SAVING FOR  
A HOME





### 03. Artificial intelligence and digitalisation

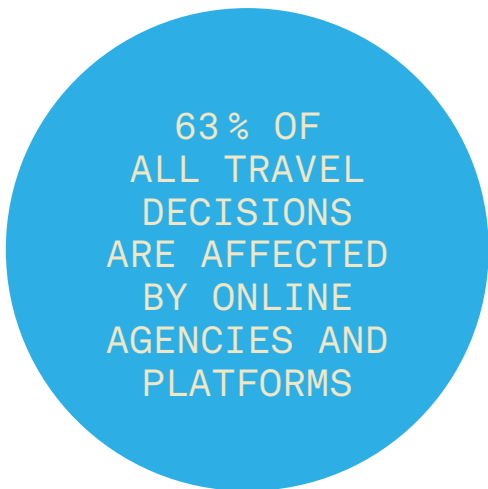
The revolution of information and communication technology (TIC) will continue to critically influence companies in the tourism sector and destination management entities. Rapid technological progress will lead the sector's main digital platforms to employ artificial intelligence systems in order to offer personalised experiences to potential travellers (2019 Booking.com study).

The *Euromonitor International 2020* report echoes these predictions, highlighting artificial intelligence as one of the main global consumption trends in 2020. Nonetheless, the report also stresses that experience personalisation should be combined with greater privacy when using customers' personal data.

In the digitisation sphere, a study by the Expedia Group (2019) confirms that 63% of family travel decisions are affected by online opinion platforms and online travel agencies.

The use of mobile devices is becoming increasingly relevant for planning and booking travel. According to the *Think with Google* study (2018)

carried out by this multinational technological firm, 48% of U.S. citizens feel comfortable planning and booking their entire trip through mobile devices. In addition, based on the results of the 2019 *Megatrends Shaping the Future of Travel* report, prepared by Euromonitor International, online reservations are expected to represent 52% of the total volume in 2024 and mobile sales, 25% of all reservations.



**52 %**  
OF ALL  
RESERVATIONS  
WILL BE  
DIGITAL IN  
2024

SUSTAINABILITY  
AND COMMITMENT  
TO LOCAL  
COMMERCE AND  
AUTHENTICITY  
WILL BE KEY

## 04. The city as the epicentre of experiential tourism

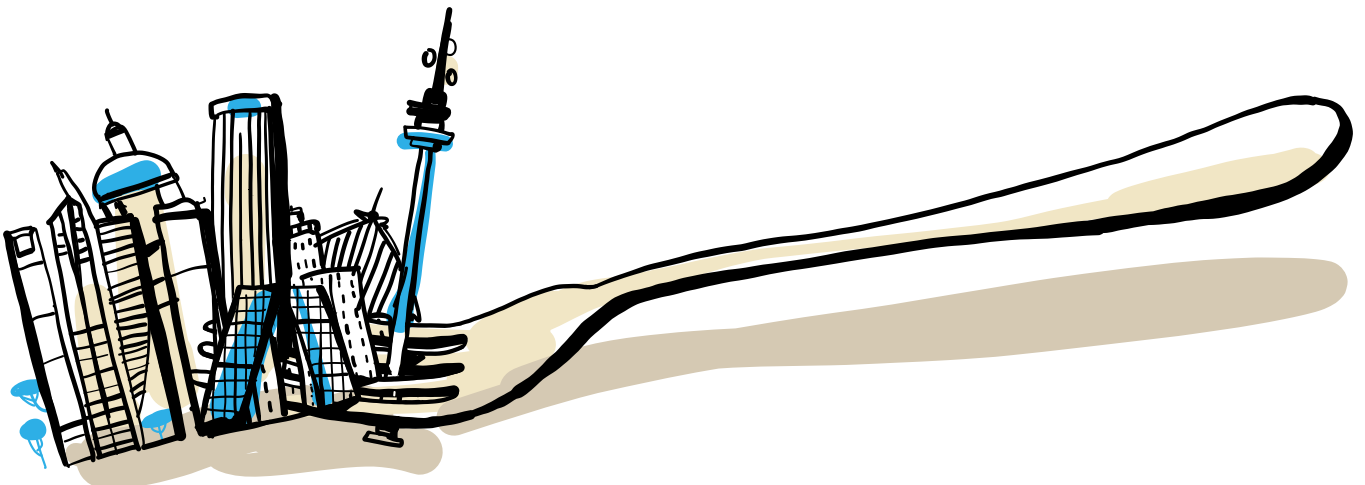
According to the 2019 Booking.com study, travellers will lean toward destinations that allow them to enjoy all their desired experiences in a more compact space-time framework. In this sense, large cities have enormous opportunities for improving their competitive positioning in the marketplace. Within the wide portfolio of experiences available in cities, gastronomic tourism has demonstrated its potential as a main driver for urban destinations.

A commitment to sustainability, local products and commerce, as well as the authenticity of the experience and quality, have made gastronomy an important differentiating factor. In fact, the ability to reserve a table at a certain restaurant has become the key element in some cases when making decisions about travel, revealing gastro-

nomie entertainment as a core factor in the tourist experience.

In addition, the increasing importance of large international events, the leisure and entertainment offer, patrimony, the cultural agenda and the growth of music tourism will also strengthen the competitive position of the city of Madrid as an urban destination in 2020.

GASTRONOMIC  
ENTERTAINMENT  
IS A DRIVING  
FACTOR BEHIND  
TOURIST  
EXPERIENCES



## 05. Other trends in urban tourism

The growth of these destinations has generated a wide variety of specific trends:

**Evolution of DMOs.** *Destination Marketing Organisations* (DMOs) previously focused exclusively on tourism promotion, yet recently shifted their approach to become *Destination Management Organisations*. These entities offer tourism management in all its dimensions, including competitiveness, spatial redistribution and management of tourist flows, the development of participatory governance, the design of tourism intelligence systems and the progression towards a truly sustainable tourism model.

**Segmentation focused on priority outbound markets.** Within the marketing strategy of a tourist destination, segmentation has traditionally been considered a fundamental tool for increasing the efficiency of promotional campaigns.

However, strategies must now focus on capturing new demand segments within source markets where Madrid is favourably positioned. In other words, it's a matter of attracting a higher-level tourist demand, with greater purchasing power and longer average stays.

COMPETITIVENESS,  
A REDISTRIBUTION  
OF FLOWS AND  
PARTICIPATORY  
GOVERNANCE  
CHARACTERISE  
TOURIST  
MANAGEMENT

THE  
SEGMENTATION  
STRATEGY IS  
TO ATTRACT  
A HIGHER-  
LEVEL DEMAND  
FROM PRIORITY  
MARKETS



# TOWARD A SUSTAINABLE AND HIGH-QUALITY TOURISM



The centre of Madrid is undergoing a hotel restructuring process, with large international luxury chains committed to making their mark. One example is Hotel Pestana, which opened its doors in 2019. The hotel is located in the former Casa de la Carnicería in the Plaza Mayor, one of the city's most emblematic spaces.

Other notable openings were the Bless Collection Hotel in Velázquez, the Hotel Aloft Gran Vía – the more urban and technological brand of Marriott Hotels – and the RIU Plaza España, which offers

585 rooms and a rooftop terrace that preserve the hotel's historical flavour.

The first Four Seasons in Spain is set to open in 2020. The hotel will be located in the Canalejas complex, a group of historical buildings that will include a commercial gallery of luxury products and a leading gastronomic space for quality tourism. Another highlight is the reopening of the iconic Hotel Ritz (Mandarin Oriental), following its most important refurbishment in its 110-year history. The new Hard Rock Hotel Madrid will also

THE CANALEJAS  
COMPLEX, HOME  
TO A FOUR  
SEASONS HOTEL,  
WILL OPEN IN  
MAY 2020

THE  
SECTOR'S  
LUXURY CHAINS  
HAVE COMMITTED  
TO BEING IN  
THE CITY  
CENTRE

launch and, in 2021, the W Madrid Hotel (Marriott Hotels), with a design inspired by Bosch's *The Garden of Delights*, will open to the public.

Currently, more than 60% of the available hotel beds are in the luxury and high-end category, with a total of 55,936 beds distributed in four- and five-star hotels. In 2019, five-star establishments was the hotel category with the highest growth, expanding by 17% compared to the previous year.

Currently, quality tourism is characterised by the cosmopolitan traveller, known for setting trends and their social and environmental commitment. Madrid is moving towards a growth model inspired by quality and sustainability, generating value for both the visitor and residents. The great challenge in the coming years will be advancing towards a sustainable tourism model, diversifying tourist flows to avoid massification, preserving traditional trade and promoting the economic and social dimension of sustainable development.

**17%**  
INCREASE OF  
FIVE-STAR  
HOTELS IN 2019



# INDUSTRY FORECASTS



THE CITY'S PROMOTIONAL CAMPAIGNS AND CONNECTIVITY ARE HIGHLY VALUED BY PROFESSIONALS

Collaborating with the city's tourism sector is key for defining strategies that can respond to current tourism challenges. The Tourist Intelligence Centre of Madrid Destino carried out the 2<sup>nd</sup> Business Perception Survey amongst the main industry players. The goal was to understand their perspectives for 2020 and their current assessment of the destination.

Of the 100 professionals surveyed, those dedicated to accommodation (31%), leisure and culture (20%), brokering (14%) and catering (10%) were the most represented. The vision of transport companies and services (4%) and event agencies (2%) was also included.

According to the results, 2019 was a very positive year for the sector. Some 81% of those surveyed affirmed that their company's turnover increased in 2019.

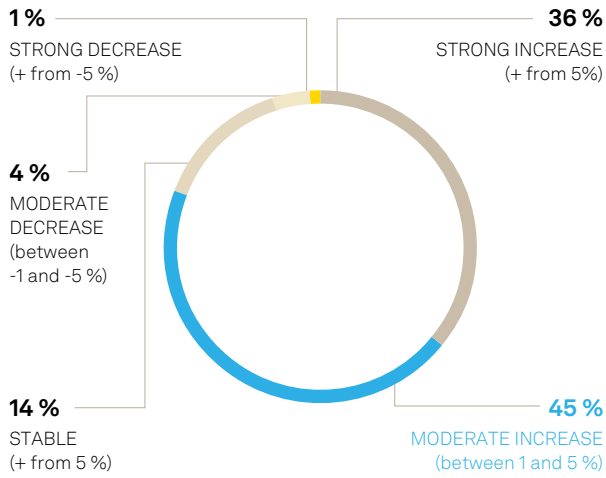
At the time of writing, the economic impact caused by the COVID-19 outbreak, particularly on the tourism sector, appears to be significant. In this regard, it is important to note that the Busi-

ness Perception Survey was carried out during the month of January 2020 and consequently, the sector's sales, profit and employment forecasts could be negatively affected. The impact cannot be assessed precisely, but will surely impact at least the first half of 2020.

81% OF  
THOSE SURVEYED  
CONFIRMED  
THAT TURNOVER  
HAD INCREASED AT  
THEIR COMPANIES  
IN 2019

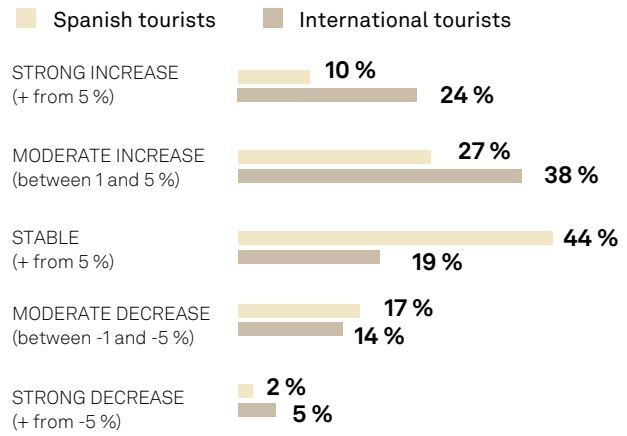
## 2019 year-end

Turnover

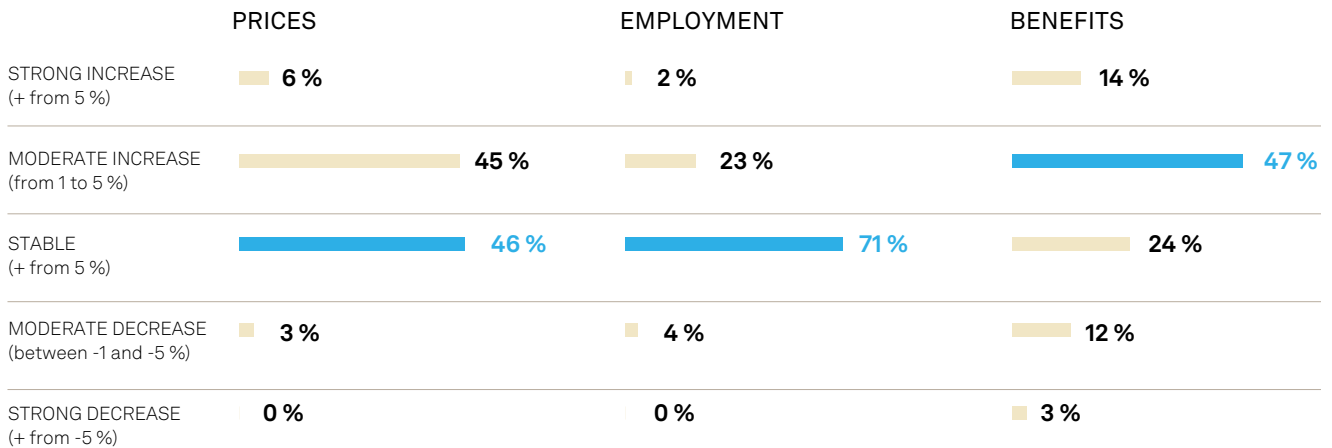


## Industry forecasts for 2020\*

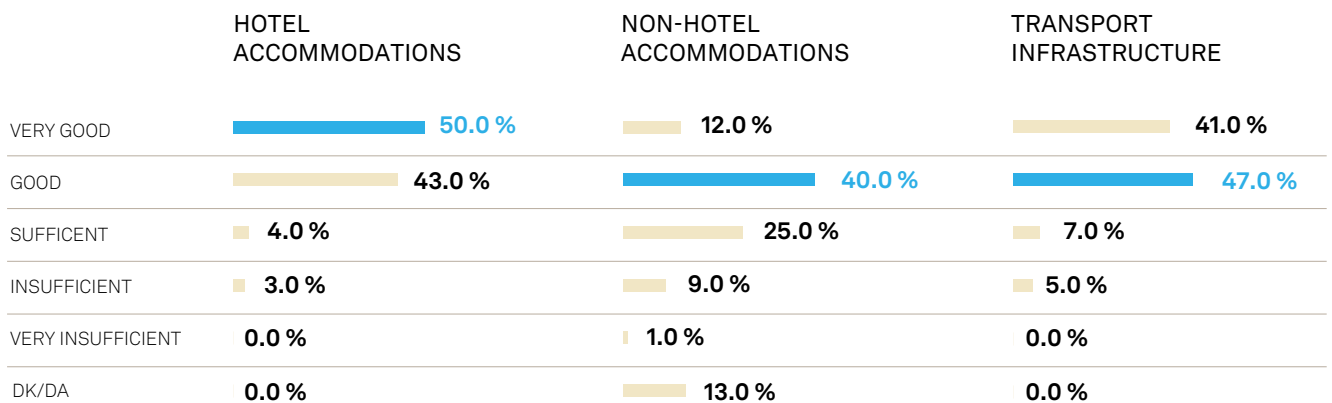
### SALES



## Industry forecasts for 2020\*



## Valuation of tourist infrastructures



\*The sector forecasts on sales, prices, employment and benefits were made in January 2020, prior to the COVID-19 outbreak.



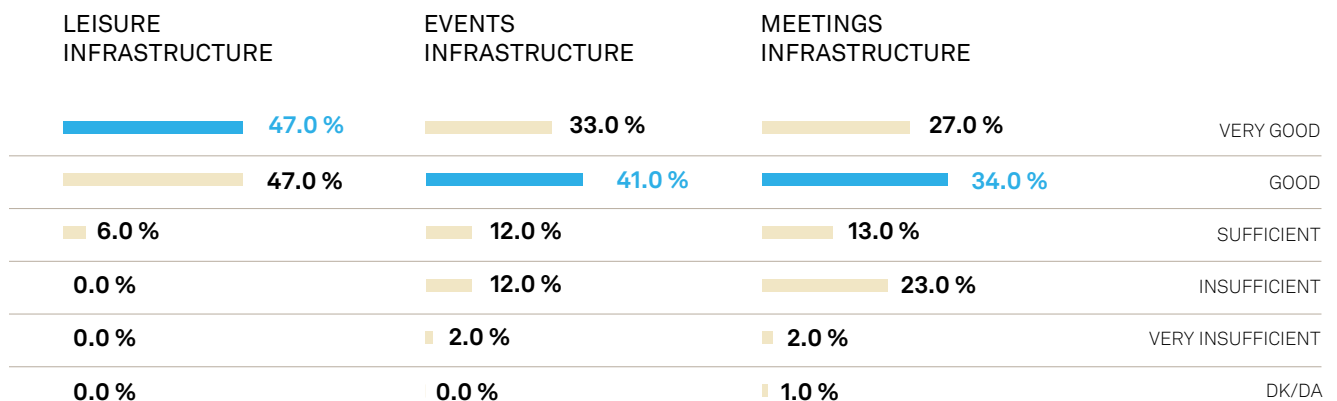
THE TOURISM SECTOR RATES THE CITY'S OFFER OF SERVICES AND PRODUCTS AS GOOD OR VERY GOOD

## Leisure infrastructure, most highly valued

Madrid's infrastructure was very positively assessed amongst those interviewed in the Business Perception Survey. Approximately 94% of respondents rated infrastructure linked to leisure (museums, cultural centres, sports, etc.) and hotel accommodation (93%) and "good" or "very good." This is followed by infrastructures related

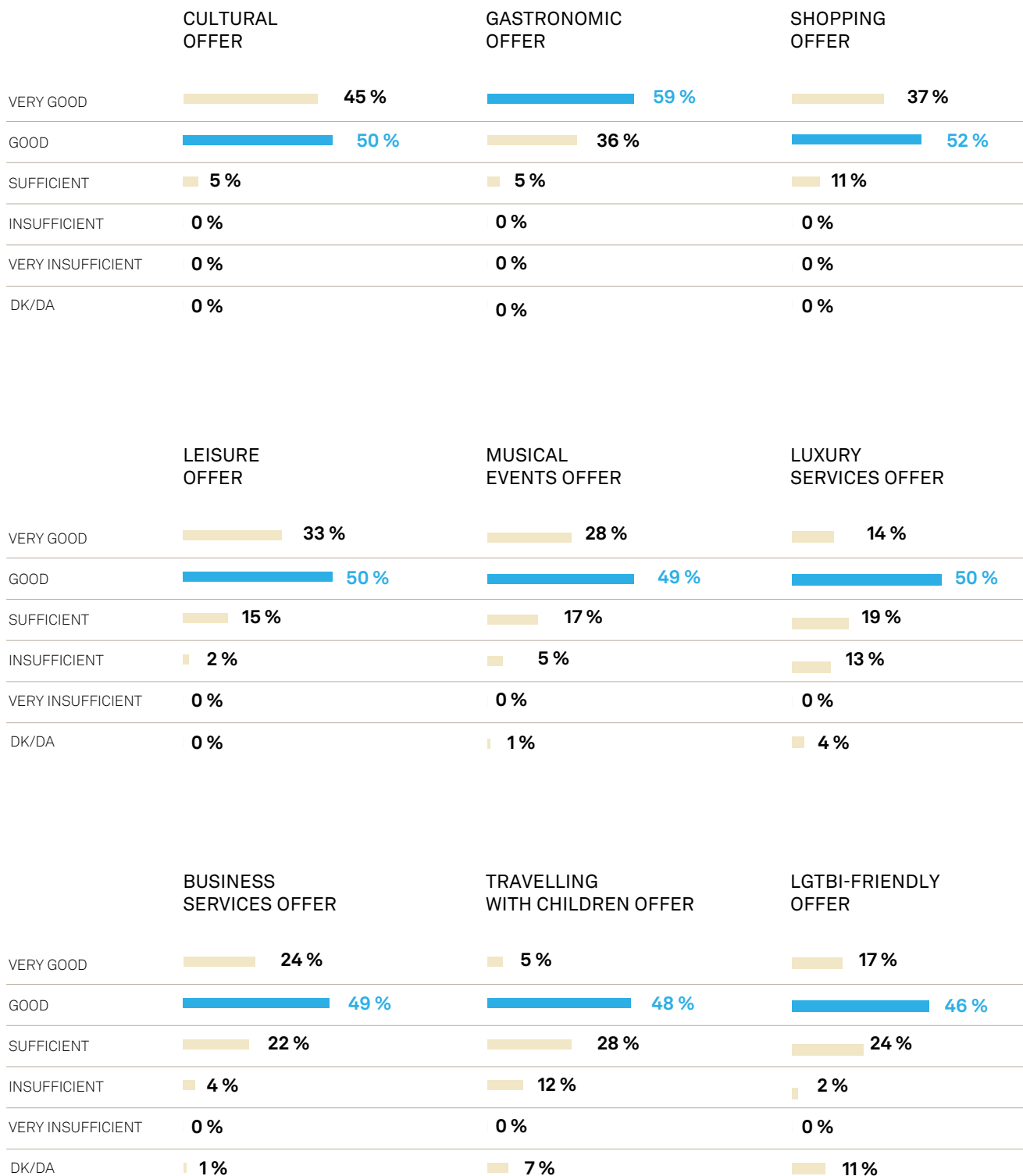
to transport (88%), events (74%) and the meetings sector (61%), although 25% of the companies consider palaces and conferences centres "insufficient" or "very insufficient."

The professional sector rated the offer of tourist products and services in the city of Madrid as "good" or "very good," highlighting the cultural offering (95%), the gastronomic/restaurant offer (95%) and the shopping offer (89%).

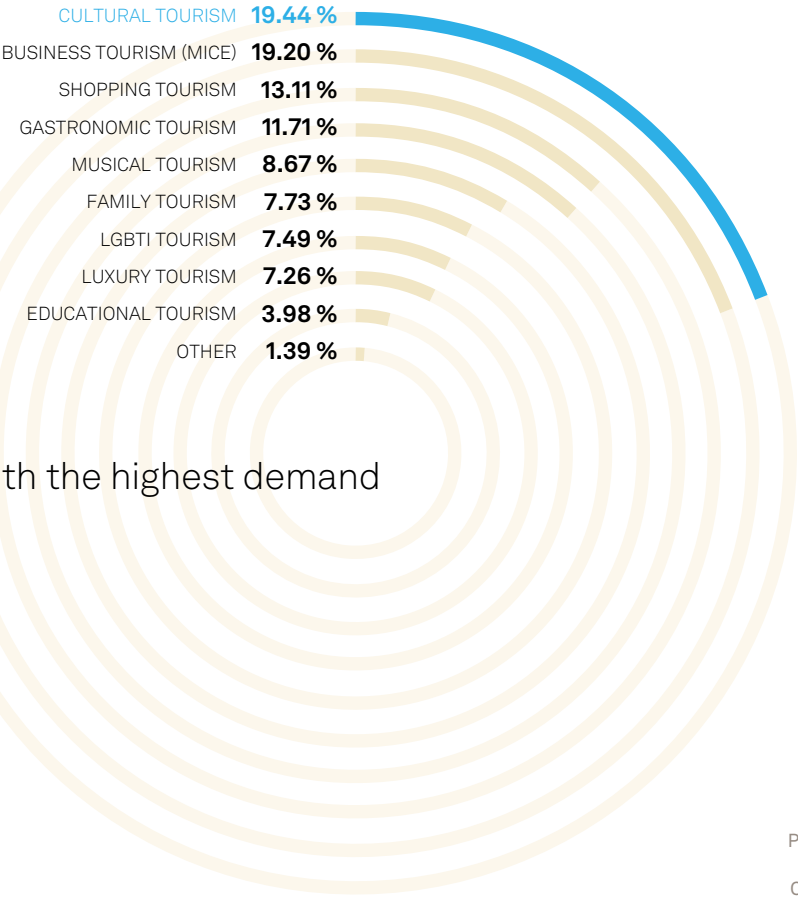


Source: Business Perception Survey 2019 of the Tourist Intelligence Centre of Madrid Destino.

## Segment valuation of the offer of tourist products and services



Source: Business Perception Survey 2019 of the Tourist Intelligence Centre of Madrid Destino.



Products with the highest demand

Source: Business Perception Survey 2019 of the Tourist Intelligence Centre of Madrid Destino.

LACK OF PUBLIC-PRIVATE COLLABORATION IS A LIMITING FACTOR, ACCORDING TO THE TOURISM SECTOR

The tourism products and services with the greatest demand at the destination are cultural tourism and business tourism, according to 83% of those surveyed. Those with less demand are academic tourism (17%) and luxury tourism (31%). Finally, the lack of public-private collaboration (61%) and the lack of destination promotion (51%) were considered by participants as the most limiting factors for the creation of tourism products and services.

CULTURAL AND BUSINESS (MICE) TOURISM ARE THE PRODUCTS WITH THE HIGHEST DEMAND

# 04

The year 2019 saw new hotel inaugurations in the city centre, the celebration of major events and conferences, the shooting of series and films and more. The priority now is to understand how to manage the city as a tourist destination in order to improve the visitor experience and the social development of residents.

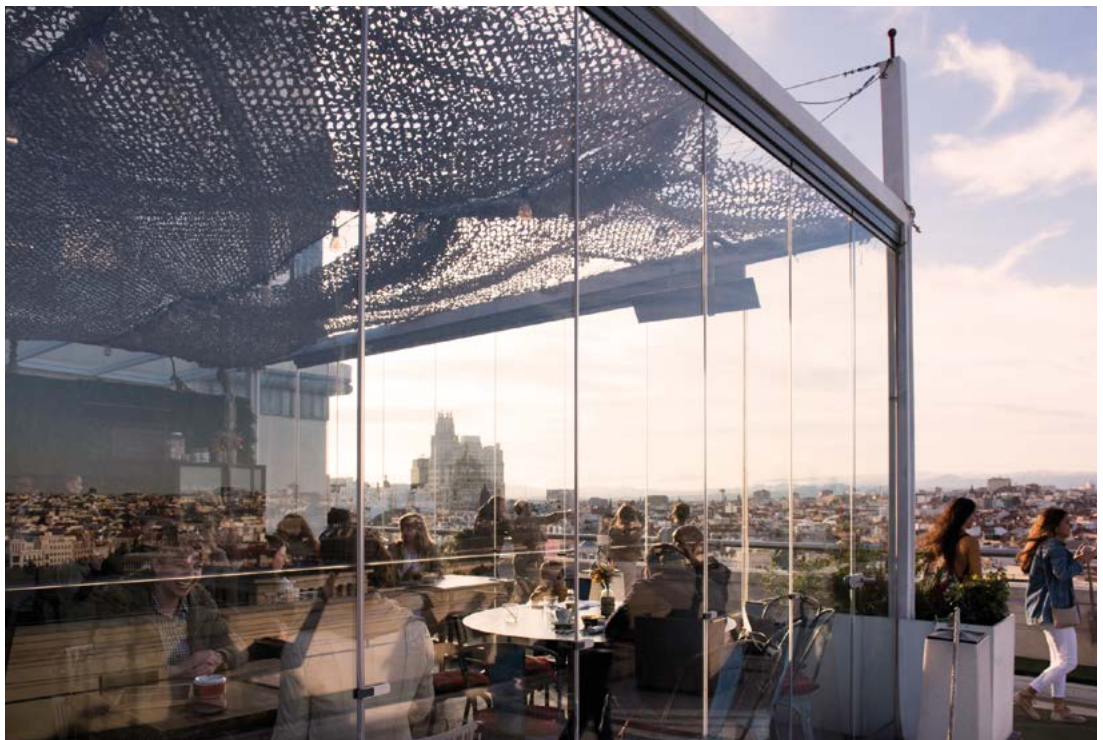
→ Promoting  
tourism from  
Madrid's City  
Hall: high-impact  
management



**M**ore than 2 million visitors served through the municipal network of the tourism network offices, 39 online and offline advertising campaigns – both national and international – more than 400 conferences either attended or supported, six large events, 100 films and series shot in the city... these are just some of the high-impact initiatives linked to tourism management in the city of Madrid.

39

ONLINE AND  
OFFLINE  
ADVERTISING  
CAMPAIGNS WERE  
LAUNCHED IN  
2019



CHALLENGES  
INCLUDE  
FACILITATING  
SUSTAINABILITY  
AND  
STRENGTHENING  
PUBLIC-PRIVATE  
COLLABORATIONS

Tourism has become a driving force in the economic development of the city. Madrid Destino is an entity within the City Hall of Madrid that manages municipal policies for tourism promotion and city information, as well as promotes its image on national and international levels.

**The Tourism Area of Madrid Destino carries out its activity via five business units: Visitor Services, Travel Trade and Connectivity, Tourism Marketing, the Madrid Convention Bureau and the Madrid Film Office.** Key priorities are developing new products, improving the visitor experience, promoting marketing and communication actions that strengthen Madrid's values, and consolidating the city as a meeting destination.

Its core strategic challenges include facilitating the sustainability of the tourism trade, promoting the decentralisation and seasonality of demand, and reinforcing public-private collaboration.

# KEY INDICATORS

**10,895**

REGISTERED  
USERS IN THE  
"VUELVE A MADRID"  
PROGRAMME

**+357 M**

IMPACTS VIA  
THE VISUALISATION  
OF DIGITAL CAMPAIGNS

**2,051,089**

VISITORS SERVED

**400**

CONFERENCES SERVED  
OR SUPPORTED

**66 35**

SERIES FILMS  
SHOT IN THE CITY



# VISITOR ASSISTANCE

Department responsible for managing the network of municipal Tourist Information Offices, as well as projects aimed at enhancing the promotion, accessibility, quality and tourism sustainability of Madrid as a destination.

Its mission is to improve the visitor experience, as well as facilitate greater sustainability of tourist activities in Madrid.



## What happened in 2019

9.5

external audit score of ISO 14.785

+2 M

people served by the municipal network of Visitor Services Offices

141,480

visitors to the Faro de Moncloa

208

guided tours of the Accessible Visits Programme

## We liked...

**BEING AN EXAMPLE OF BEST PRACTICES**

Distinction of Madrid as an example of best practices in the development and management of more accessible tourism at the 8<sup>th</sup> World Conference of Urban Tourism, organised by the World Tourism Organization, in Nur-Sultan (Kazakhstan), October 2019.

## What we're going to do in 2020

- Develop a new tourist card for Madrid, aimed at improving destination sustainability, as well as boosting the benefits of the tourist trade in our city.
- Open a new store in the Casa de la Panadería, with a design that reflects a contemporary interpretation of the city's traditions and architectural elements, promoting artists and artisans from Madrid.

# TRAVEL TRADE & CONNECTIVITY

Department specialised in promoting the city of Madrid as a leisure travel destination. Its objective is to position Madrid as a reference tourist destination in Europe with a clear commitment to quality and sustainable and decentralised tourism throughout the city's different neighbourhoods and districts.



## What happened in 2019

172

media, agencies and international tour operators served FAM trips carried out with the Madrid sector

34

promotional activities organised or involving TT&C

1,870

visitors served during 6 trade fairs

5

collaboration agreements with the sector to create segmented products

## We liked...

**PROMOTIONAL DAYS IN SOUTH KOREA, JAPAN AND THE LATAM MARKET**

Inverse promotional days with 30 professional industry agents from the LATAM market in Madrid, as well as direct promotional days with South Korea and Japan with 50 local companies: visits, training activities and networking to promote Madrid as a destination and strengthen ties amongst professionals from the Madrid tourism sector and the strategic markets of LATAM, South Korea and Japan.

## What we're going to do in 2020

- Strengthen own workshops and joint promotional actions in collaboration with the Madrid Convention Bureau (MCB) in strategic markets.
- Promote the Stopover programme, led by Iberia and ¡Hola Madrid!. The Spanish airlines propose turning Madrid into a stopover destination to make visits to the city easier without increasing ticket prices.
- Promote collaboration with the Madrid tourism sector in the creation and marketing of tourism products.

# TOURISM MARKETING

This department supports city events, as well as leads national and international tourist advertising and promotion campaigns, both for leisure and business.

## 01. International marketing

Department responsible for promoting visibility of the city of Madrid as an urban tourist destination through innovative advertising approaches and marketing and communication actions in offline and digital environments. The goal is to reach the largest public interested in travel by optimising investment.



## What happened in 2019

**39** online and offline advertising campaigns, national and international

**+€5 M** advertising turnover for press trips

**85** press trips attended: **400** communication professionals from **50** outbound markets

**+357 M** impacts via visualisation of national and international digital campaigns

## We liked...

### CAMPAIGNS THAT INSPIRE A TRIP

New innovative campaigns based on storytelling and branded content, digital marketing techniques that offer quality and relevant content

for the user and that can influence and inspire their future travel choices.

In 2019, a series of articles were posted on international blogs and travel websites with content about Madrid reinforcing the spirit and attributes of the city as a friendly, welcoming, active, green and sustainable tourist destination. This action generated more than 17 million impacts on users in the online environment and more than 70,000 visits to these articles on Madrid.

## What we're going to do in 2020

- Delve into audience segmentation with greater use of big data, defining different audiences of value for Madrid's interests and designing personalised campaigns for each traveller segment.
- Greater dissemination and optimisation of campaigns for official tourist products in the city.
- Marketing activities focused on tourism sustainability.

## 02. City Marketing and PR

Department responsible for leading actions to stimulate different segments of tourist products and service offerings, with the aim of improving the visitor experience, as well as supporting the hosting of major events to strengthen the city's brand through a sustainable model.



### What happened in 2019

**10,895**

registered users in the "Vuelve a Madrid" programme and 80 member establishments

**40**

events and/or cultural dates (support and collaboration)

**2,800**

attendees at Madrid Student Welcome Day

**6**

large city events (Madcool, Gastrofestival, MADO, MSWD, Mira Madrid, Final of the UEFA Champions League)

### We liked...

#### 10<sup>TH</sup> EDITION OF GASTRO-FESTIVAL

The 10<sup>th</sup> edition of the Gastro-festival included the participation of 450 companies and public institutions. During the event, 500 activities were carried out to help position Madrid as a top-tier gastronomic destination.

### What we're going to do in 2020

- Promote and boost city events that foster decentralisation and decrease seasonality of tourism demand.
- Promote the positioning of the city of Madrid as a quality gastronomic destination, in collaboration with the 2020 Iberoamerican Gastronomy capital.
- Develop and expand the scope of the *Vuelve a Madrid* programme.

# MADRID CONVENTION BUREAU

Department specialised in promoting Madrid as a meeting destination, promoting the capital of Spain as a city for professional meetings and events and attracting important international conferences and conventions.



## What happened in 2019

25

own promotional activities organised or those in which it has participated

69

nominations for conferences presented

427

conferences attended and/or supported in Madrid

685

corporate events attended

## We liked...

**WORLD  
TRAVEL  
AWARD**

The city of Madrid was distinguished as the “World’s Best Destination for Meetings and Conferences” at the 26<sup>th</sup> edition of the 2019 World Travel Awards. Almudena Maíllo, delegate councillor for Tourism of the Madrid City Hall and David Noack, director of the Madrid Convention Bureau, accepted the award at the Royal Opera House in Muscat (Sultanate of Oman).

## What we’re going to do in 2020

- Strengthen own workshops and joint promotional actions in collaboration with Travel Trade & Connectivity in strategic markets.
- Organisation in Madrid of the M&I Forum (250 representatives of MICE agencies) and the Best Cities Global Forum (35 representatives of international associations).
- Implementation of a Legacy model in the city of Madrid.

# MADRID FILM OFFICE

Department responsible for promoting the city as an ideal setting for film productions, as well as assisting film producers and professionals to stimulate investment and local development.

The Madrid Film Office also promotes meetings and training courses aimed at professionals in the Madrid film industry, and carries out actions to raise awareness of Madrid's audiovisual heritage amongst residents.



## What happened in 2019

287

audiovisual projects served through production work, 193 national and 94 international

66

filmed series: *Elite*, *Money Heist* and *Antidisturbios*, amongst others

35

films shot in the city

7

festivals and audiovisual markets served through promotional work

## We liked...

### "WAY DOWN" PRODUCTION

The City of Madrid Film Office facilitated filming and provided production assistance for the Spanish blockbuster *Way Down*, the first project to be considered a "Filming of Municipal Interest" by the Madrid City Hall (April 2019). The production involved an estimated investment of €7,150,000 in Madrid, with the direct hiring of 250 audiovisual professionals and 2,500 indirect jobs, including positions and services.

## What we're going to do in 2020

- Collaboration agreement between Film Madrid and the City of Madrid Film Office to promote the city in national and international markets and festivals, through international advertising and international influencer FAM trips in Madrid.
- Economic study of Madrid's audiovisual industry (2008-2019).
- Photographic exploration project focused on peripheral districts of the city to identify possible film locations.



# RESEARCH NOTES

To create this report, primary sources were used from the Madrid Destino (Madrid City Hall) Tourism Area and secondary sources from institutions, organisms, associations and companies specialised and linked to the tourism sector. Data analysed correspond to the year 2019. In cases when it was not possible to analyse data corresponding to the period taken between January and December 2019, the most recent available data were used.

At all times, sources from relevant official institutions and organisations and in the tourism sector have been used (AENA, National Institute of Statistics, RENFE, Ministry of Industry, Commerce and Tourism, World Tourism Organization, etc.). In cases when it was considered necessary, information was complemented with reports and studies from companies, most related with the tourism sector (Euromonitor International, Booking, Movelia, Planet Intelligence, STR Global, Transparent Intelligence, TripAdvisor, etc.).

Notes on the use of the different sources follow:

## **Mastercard.**

Spending figures for international tourism in Madrid are based on data from transactions carried out through the Mastercard card network in 2019. Transactions in physical stores and made through the private use of Mastercard cards were considered; therefore ATM withdrawals, online transactions and corporate card transactions were excluded from the analysis. In terms of industries analysed, a dis-

inction is made between a selection of tourism-related industries, and other industries that do not have a tourism component.

Data was processed by the Mastercard Data & Services team to carry out this study to ensure the correct representation of each country of origin.

For this study, Madrid is understood as the city of Madrid, focusing on the 21 districts that it comprises (the Centre, Salamanca, Chamartín, Barajas, Chamberí, Retiro, Tetuán, Moncloa-Aravaca, Ciudad Lineal, San Blas, Fuencarral-El Pardo, Arganzuela, Latina, Vicálvaro, Carabanchel, Hortaleza, Usera, Puente Vallecas, Villaverde, Villa de Vallecas and Moratalaz).

## **Business Perception Survey.**

Questionnaire designed and led by the Tourist Intelligence Centre of Madrid Destino. It collects sample information from slightly over 100 professionals representing the tourism sector of the city of Madrid, who responded online during the month of January 2020.

## **Tourist Perception Survey.**

Questionnaire designed and led by the Tourist Intelligence Centre of Madrid Destino. This collects sample information from more than 1,600 visitors who have been served in person at the official tourist information centres and points in the city of Madrid between the months of January and November, 2019.

## **National Institute of Statistics (INE).**

At the time of writing and publishing this report, the data provided by the INE up until 2018 was final. Data

for 2019 was provisional. The data on travellers, overnight stays and average stays were taken from the Hotel Occupancy Surveys (EOH) and Tourist Apartments (EOAT) on the city of Madrid. Hotel occupancy data, ADR and RevPar from the INE refer to EOH. Data from the Tourist Spending Survey (EGATUR) are from the Community of Madrid.

## **STR Global.**

To make the international comparison of the main hotel indicators, we used data provided by STR Global, a company specialised in comparative analysis that provides information on the hotel market worldwide. The variation in values of hotel indicators compared to those offered by the INE is due to the difference in the data sample used.

## **Transparent Intelligence.**

There are no official figures on housing for tourist use (HTUs). This report provides data on the offer of private accommodation, on a short-stay rental basis, in the city of Madrid in 2019 provided by the company Transparent Intelligence. The study is based on the opinions that tourists share on platforms after their stay and on the configuration of the existing accommodation offer. Public data available on four of the sector's main platforms operating in Spain are used as the data source for the analysis: Airbnb, Booking.com, Homeaway and TripAdvisor.

## **General data on the city of Madrid**

(number of monuments, restaurants, shops, etc.), unless otherwise indicated, were provided by Madrid City Hall and its statistical teams.

# IMAGES

- P. 3** Tourist photos of Gran Vía from a terrace on C/ Alcalá.
- P. 7** Image of Adolfo Suárez Madrid-Barajas Airport.
- P. 8** View of Teatro Real from the Plaza de Oriente.
- P. 13** Visitor on the access stairway to CaixaForum Madrid.
- P. 22** Sunset on Gran Vía, a favourite area for shopping tourism.
- P. 27** Main entrance to the Prado Museum.
- P. 28** Tourists on the steps of the pond of Retiro Park.
- P. 30** Audience during one of the concerts of the 2019 Mad Cool festival.
- P. 31** Scene from the musical *The Lion King*.
- P. 34** Visitor at the main entrance of the Prado Museum.
- P. 39** Students in the library of the Reina Sofía Art Museum.
- P. 40** Image of Serrano street, one of the most renowned shopping areas in the city of Madrid.
- P. 42** New kiosk opened in the Plaza de Oriente in December 2019.
- P. 45** Ceiling of the Palacio de Cristal in Retiro Park.
- P. 46** Image of the Plaza Mayor.
- P. 53** Exterior of the Canalejas complex, which will open in 2020.
- P. 54** Visitor service point in the Plaza Mayor.
- P. 55** Puerta del Sol.
- P. 57** Reception desk of the Hotel Riu Plaza España, opened in 2019.
- P. 61** Inside stairway of the Canalejas complex.
- P. 62** Visitors on the terrace of the Círculo de Bellas Artes.
- P. 64** Visitor service office in the Plaza Mayor.
- P. 65** Madrid inverse promotion day in LATAM markets.
- P. 66** Madrid advertising campaign “¿Cuándo quedamos?”
- P. 67** Official image of the 10th Gastro-festival.
- P. 68** 2019 World Travel Award ceremony, in the Sultanate of Oman.
- P. 69** Filming of the Spanish blockbuster *Way Down*.

**Illustrations:** Raúl Arias

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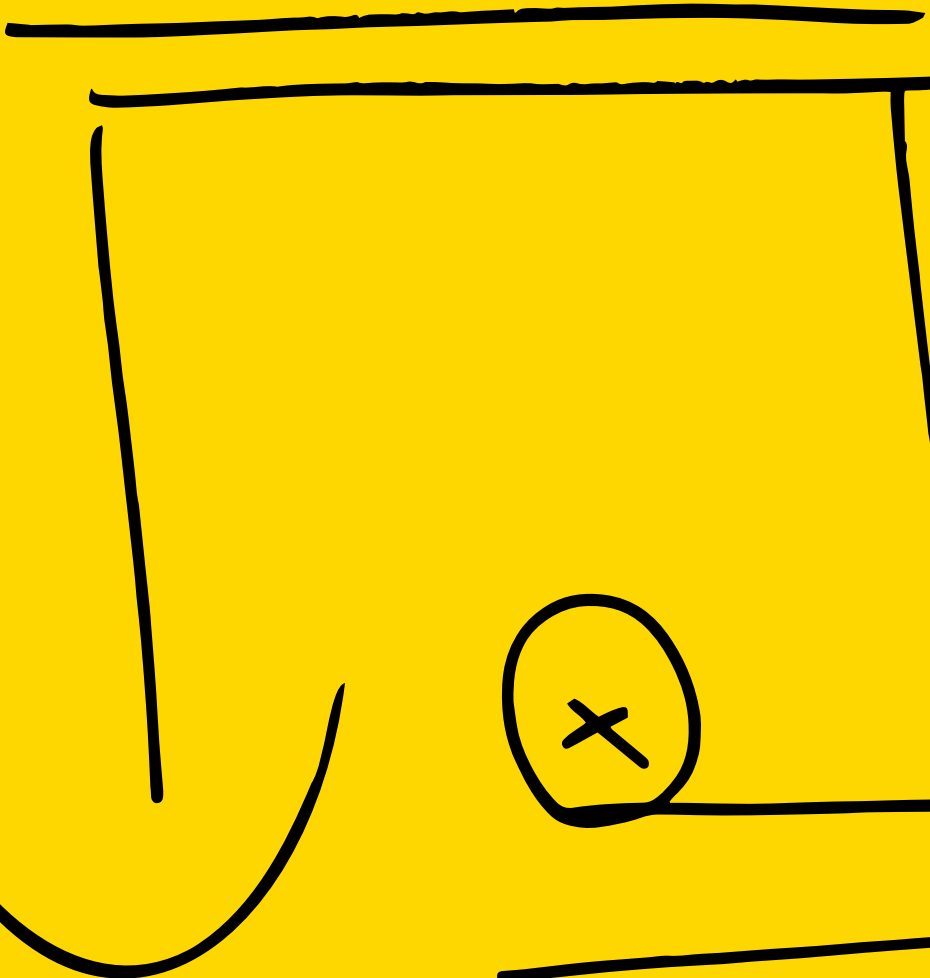
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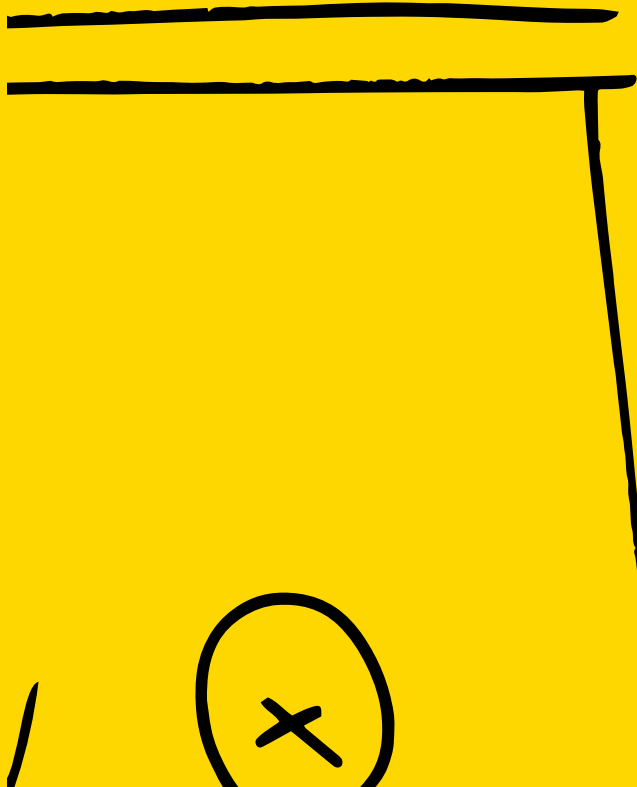
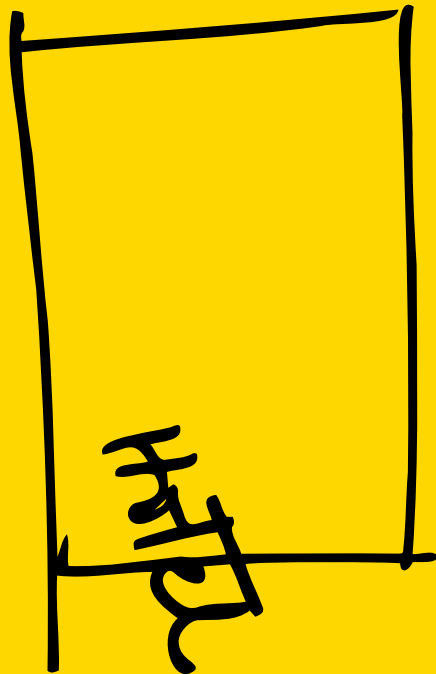


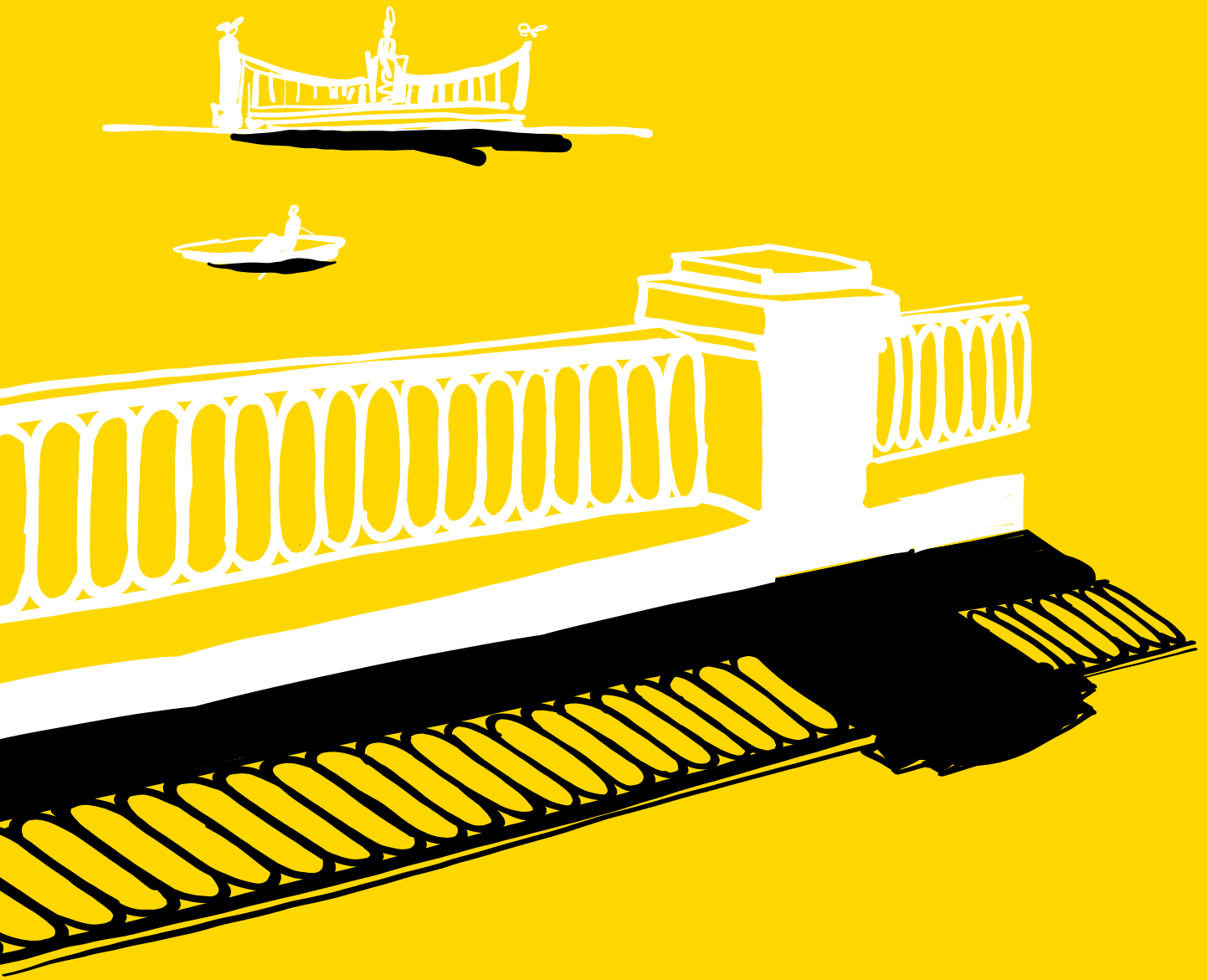
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Corrido!


sof

overpriced





20



Madrid 2019.  
Tourism Report

MADRID,

A GASTRONOMIC

DESTINATION

**THE GASTRONOMY  
OF DESTINATION  
MADRID IN 8  
KEY POINTS**

National visitors to the city underscore the broad variety and quality of its culinary offering. The sociological study *2019 Madrid Destino Gastronomical Guide*, carried out by the City Hall of Madrid Tourism Department, confirms that, in Madrid, one can eat well, at any time and at a competitive price.

# 1

## 65% OF NATIONAL VISITORS SAY MADRID HAS THE MOST VARIED CULINARY OFFERING

Flavours, colours and textures. Experimenting with unique dishes, recalling traditions or simply savouring the moment. Nowadays, gastronomy is a tourist driver that goes beyond food: it's a showcase of a lifestyle, a culture and a way of being. Madrid has become a symbol of culinary diversity which fuses history, evolution, innovation and the use of local resources. Travelling to the city and eating in its establishments is a tourist experience.

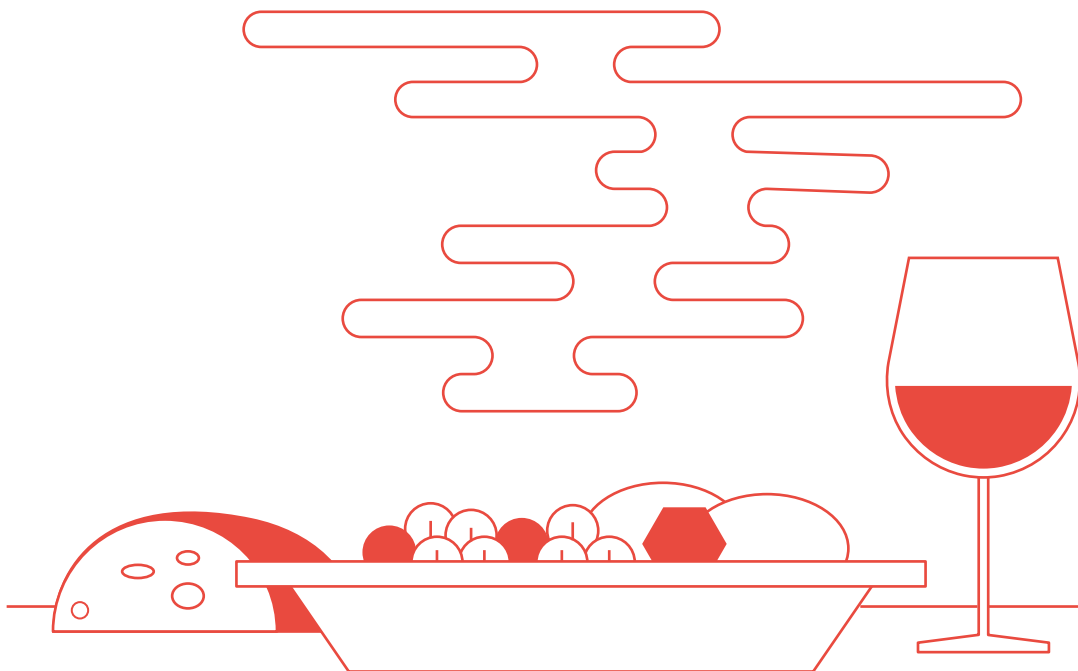
According to the *2019 Madrid Destino Gastronomical Guide*, two out of three Spaniards (65% of those interviewed) assure that Madrid has the most varied culinary offering in Spain. And more than 50% of visitors think the cultural, gastronomical, accommodation and leisure offerings are major considerations when travelling to Madrid.



2 OUT OF 3 SPANIARDS WOULD UNEQUIVOCALLY RECOMMEND MADRID AS A GASTRONOMICAL DESTINATION

## 60%

OF SPANIARDS CHOOSE THEIR TRAVEL DESTINATION BASED ON CUISINE



## TAP BEERS & *COCIDO* STEW IN A TRADITIONAL RESTAURANT IN THE CITY CENTRE

Beers on tap, Madrid *cocido* stew near the Puerta del Sol, Madrid-style tripe in La Latina neighbourhood and a calamari sandwich in the Plaza Mayor. Not to mention the *pinchos* and *tapas*. These are the main culinary attractions for national tourists to the city of Madrid.

€23

IS THE AVERAGE  
PRICE OF A PLAT  
DU JOUR THAT  
SPANIARDS ARE  
WILLING TO PAY  
IN MADRID

€40

IS THE AVERAGE  
À LA CARTE PRICE  
THAT SPANIARDS  
ARE WILLING TO  
PAY IN MADRID



## MADRID, WHERE THERE IS ALWAYS AN OPEN BAR OR RESTAURANT

Nine out of 10 Spaniards assure there is always a bar or restaurant open to dine at any time and enjoy a typical and characteristic yet diverse gastronomy and at a very economical price. These qualities have made Madrid an international reference point. Madrid ranks first in surveys in reflection of its offering, gastronomic variety and price-quality relationship, as well as its use of the best raw materials in its culinary creations.

Of those surveyed, 62% designated Madrid as a worldwide gastronomic benchmark.

**63 %**

ASSERT THAT  
ONE CAN EAT WELL  
AND ECONOMICALLY  
IN MADRID

**54 %**

CLAIM THE BEST  
RESTAURANTS  
IN SPAIN ARE  
IN MADRID

## MADRID, THE MOST CITED CITY

Madrid is the most frequently cited city for Spanish travellers when it comes to eating well. In terms of the best cities to visit to combine tourism and eating in high-quality restaurants, Madrid ranks second, after San Sebastian. Sevilla stands out for its price-quality relationship, A Coruña for its raw materials and San Sebastian for its quality. Madrid is recognised for the variety, offering and prestige of its establishments. Amongst international destinations, Madrid ranks in 7<sup>th</sup> place after Paris, Rome, London, Italy, Lisbon and New York.

RANKING  
OF THE MOST  
FREQUENTLY  
MENTIONED  
CITIES FOR  
EATING WELL:

39 %  
MADRID

26 %  
SAN  
SEBASTIÁN

26 %  
BILBAO

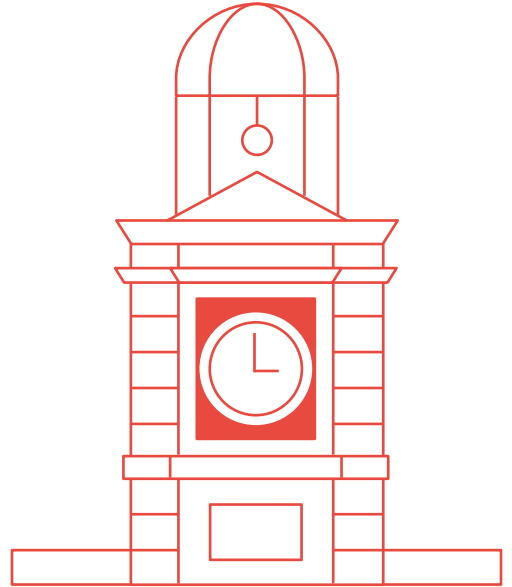
25 %  
BARCELONA

## CASA LUCIO, DIVERXO & YAKITORO ALL RANK HIGH

The tradition, prestige and price-quality relationship of Madrid's restaurants make them a main attraction for visitors. The Casa Lucio tavern, DiverXO (Dabiz Muñoz) and Yakitoro (Alberto Chicote) head the list of the most popular establishments. They offer traditional, creative and fusion cuisine, respectively.

New gastronomic experiences have revitalized the city's markets, transforming them into essential stops on many tourist routes.

The markets of San Miguel, San Ildefonso, San Fernando, Chamberí and La Cebada are the most popular.



### MADRID'S MOST WELL-KNOWN GASTRONOMIC DISTRICTS

50 % Plaza Mayor

37 % Puerta del Sol

37 % La Latina

35 % La Castellana

32 % Chueca

100 %

### GASTRONOMIC EXPERIENCES THAT MOST INTEREST MADRID VISITORS

63 % Eat in a restaurant

50 % Taste local gastronomy

50 % Visit a market

36 % Buy local

100 %

## MADRID ESTABLISHMENTS OFFER TYPICAL DISHES & GREAT AMBIENCE

Traditional cuisine is a hallmark of Madrid’s identity. The dish that Spaniards know most, by far, is *cocido madrileño*, whose recipe dates back to the 15<sup>th</sup> century.

Next comes *callos a la madrileña*, winter stew and the calamari sandwich, a creation popularised in the 1950s whose origin is unclear. Over time, it has become part of the city’s culinary culture.

Visitors also link the capital to churros with chocolate, *huevos rotos*, *patatas bravas*, *tapas* and *porciones*.

For almost 30% of surveyed Spaniards, Madrid means great *pinchos*, *tapas* with drinks, the plat du jour and a good price-quality relationship.

In addition to the offer, they value the great atmosphere and originality of establishments.



### WHAT GASTRONOMIC PRODUCT DO YOU MOST ASSOCIATE WITH MADRID?

44 % Churros with chocolate

37 % Huevos rotos

35 % Tapas and porciones

32 % Patatas bravas

100 %

### WHEN TALKING ABOUT MADRID, WHAT TYPICAL DISH COMES TO MIND?

69 % Cocido madrileño

42 % Callos a la madrileña

26 % Calamari sandwich

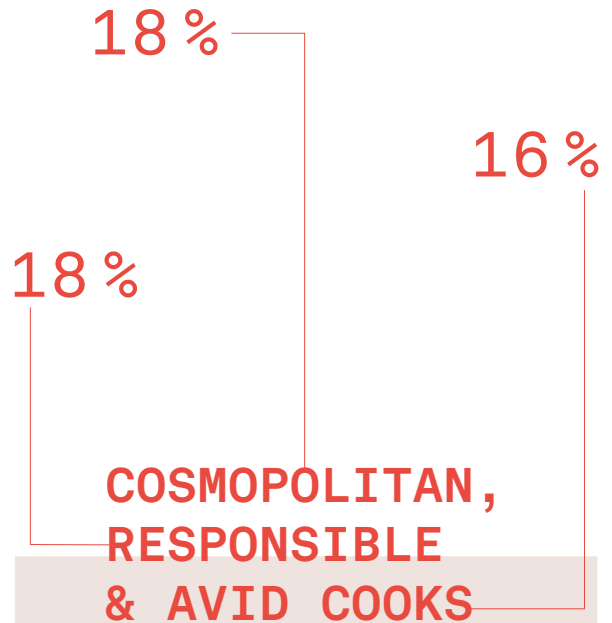
100 %

## GERMANS PREFER PAELLA & TAPAS

The study *Madrid Destino Gastronómico* also took into account the opinions of German tourists. For this market, the fifth ranked outbound market in 2019 with 261,271 tourists, typical dishes (*cocido*, *callos* or calamari sandwich) take a back seat. Germans prefer to eat paella, *tapas*, fish, and Spanish omelette when visiting Madrid, according to the responses of 800 residents from 11 regions of Germany.

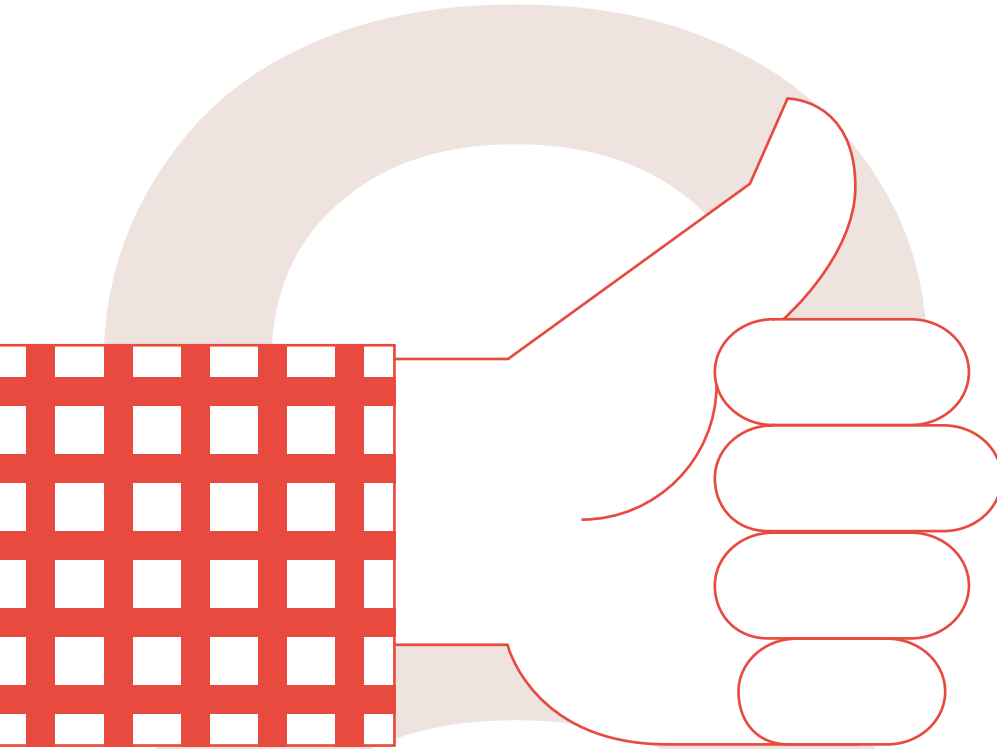
Recommendations from locals are the second source when searching for information on the gastronomic offer. Before using apps, they prefer to look at the official website of the destination. German tourists are willing to pay €40 for a plat du jour, while looking for food that is tasty – something they associate with Madrid gastronomy.

For 54% of Germans, enjoying local gastronomy is their key experience. Amongst the establishments that stand out, Germans cite the contemporary cuisine of Cebo, which has a Michelin star; Taberna del Sur, in the heart of the Lavapiés district; and Mr. Lupin, a bistro near Paseo de la Castellana which, curiously, celebrates French cuisine.



Spaniards like to eat, but with a conscience. When analysing how respondents relate to food, data from the *Madrid Destino Gastronómico* study show that Spaniards are adventurous and enjoy trying new dishes. They are interested in cooking and seek to consume responsibly.

Most consider themselves cosmopolitan in their culinary tastes (18%), avid cooks (18%) and responsible (16%). The gourmands (who prefer quantity and traditional food) and foodies (who try all kinds of dishes in new establishments with others) occupy the next two places on the list.



## A FAIRLY OR VERY GOOD OFFER FOR TOURISTS

When respondents are asked how they value the gastronomic offer for tourists in Madrid, most – 51% – say that it is fairly good or very good.

Finally, national tourists give the city of Madrid's gastronomy a positive score (73 out of 100).

### WHAT IS THE QUALITY OF THE GASTRONOMIC OFFER AIMED AT VISITORS?



## METHODOLOGY NOTE

### (SPAIN)

Research carried out by Instituto Sondea for the Tourism Department of the City Hall of Madrid on 18-65-year-old residents in Spain.

821 valid digital interviews: 50.06% men / 49.94% women. Aged 18 to 24 years (10.84%), aged 25 to 34 years (18.51%), aged 35 to 44 years (25.82%), aged 45 to 54 (24.85%), and 55 to 65 years (19.98%).

Educational level: University 58.71%, Secondary 38.37%, Primary 2.92%.

Origin: South 28.87%, Centre 23.51%, Northeast 18.88%, North 15.59%, East 13.15%. Fieldwork: 6-10 September 2019. Sampling error  $\pm 3.4\%$ .

### (GERMANY)

Research carried out by Instituto Sondea for the Tourism Department of the City Hall of Madrid on 18-65-year-old residents in Germany.

809 valid digital interviews: 50.7% men / 49.3% women. Aged 18 to 24 years (12.12%), 25 to 34 years (20.57%), 35 to 44 years (19.34%), 45 to 54 years (25.095%), and 55 to 65 years (22.88%).

Educational level: University 41.66%, Secondary 42.52%, Primary 15.82%.

Origin: 11 German länder (federal states) Fieldwork: 11-13 September 2019. Sampling error  $\pm 3.4\%$ .



Madrid  
Destino