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Market and Trade Profile: Spain

June 2021

Overview

- **‘Chapter 1: Inbound market statistics’** provides insights on key statistics about Spanish travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **‘Chapter 2: Experiences and perceptions’** features details about what visitors from Spain are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by the Spanish in general are also highlighted.
- **‘Chapter 3: Understanding the market’** takes a close look at consumer trends in Spain, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach Spanish consumers are indicated, too.
- **‘Chapter 4: Access and travel trade’** shows how people from Spain travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the Spanish travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

Please note that most of this report refers to the market conditions for travel from Spain to the UK prior to the COVID-19 pandemic and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available here: visitbritain.org/inbound-covid-19-sentiment-tracker.

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Executive Summary

1: Inbound market statistics

Chapter summary

- Despite the severe shorter-term impact of the COVID-19 pandemic, visits from Spain are forecast to grow by 23% comparing 2019 and 2030, and visitor spending in the UK by 55% in the same timeframe, which would see the Spanish market reach nearly 3 million visits and more than £1.5 billion in visitor spending by 2030.
- The Spanish rank globally in 11th place for international tourism expenditure with more than US\$27.9bn spent on outbound travel in 2019.
- Spain is the UK's fifth largest source market globally in terms of visit volume and ranks seventh in terms of visitor spending (2019).
- The Spanish market over-indexes for visitation in low and shoulder season.
- London is the leading destination for a trip to the UK but the South East and South West are also popular based on the average nights spent in the UK in 2017-2019.
- In 2019, more than three quarters of spending came courtesy of holiday visitors and visits to friends and/or relatives; business visitors contributed 14%. On average, visitors residing in Spain spent £421 per visit in the UK; on holiday this rises to £455 per visit.

2019:
The Spanish
source market is
worth round
about £1 billion in
visitor spending
to the UK.

2: Experiences and perceptions

Chapter summary

- Almost three in five Spanish visits involve dining in restaurants; more than half feature shopping. Going to the pub is also very popular and a third of Spanish visits involve socialising with locals.
- The number one pastime for the Spanish on holiday in the UK is sightseeing (two thirds) and more than half allow time for parks or gardens, a trip to a museum or art gallery and almost as many visit castles and historic houses. More than a quarter of Spanish on holiday in the UK go on a guided tour; almost one-in-ten would feature a visit to a literary, music, TV, or film location.
- The Spanish rate the UK within the top 10 out of 50 nations for culture overall, contemporary culture, sports, vibrant cities and built and cultural heritage, and associate museums, music, film and sports most strongly with the UK.
- 98% of Spanish visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.
- Asked for reasons which would encourage the Spanish to travel back to the UK for a holiday, close to two-in-three said that they would like to visit a different part of the UK than on a previous trip, followed by half who are attracted back by the prospect of visiting sights/attractions they did not get to see on their last visit(s).

Source: International Passenger Survey by ONS, Anholt-Ipsos Nation Brands Index 2019

The UK makes
the Spanish
top 10 out of 50
countries for:

contemporary
culture, culture
generally, sports,
vibrant cities and
built & cultural
heritage



3: Understanding the market

Chapter summary

- The most influential source for destination choice for the Spanish who have visited Britain or are considering a visit are friends, relatives and colleagues followed by travel blogs and travel guidebooks. These are closely followed by websites providing reviews and information on search engines.
- In a normal year, a large proportion of Spanish holiday visitors tend to start thinking about their trip as early as half a year or more in advance, but more than two-in-three book their trip within two months before arrival.
- The majority of Spanish travellers book part or all of their leisure trips online. However, when they booked accommodation and transport combined, more than one in three visitors made the booking face-to-face. Almost three-in-five Spanish currently see bookings with a travel agent as the safest option to mitigate risk during the uncertainty around travel during the pandemic.
- VisitBritain's international recovery sentiment tracking shows 77% of the Spanish consider taking an international leisure trip in 2021, showing strong desire to travel. Of those who consider taking such a trip to Europe, 14% consider a trip to Britain – this is among the highest levels of consideration stated in any of the European source markets in a very competitive year. With many travellers still undecided on their destination in spring 2021, there is strong potential to influence destination choice and bookings.

Source: VisitBritain/IPSOS 2016, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021

Vaccination,
money-back
guarantees and
hygiene & safety
protocols

are key facilitators
for the Spanish to
consider a leisure trip
abroad.



4: Access and travel trade

Chapter summary

- Most Spanish travel to the United Kingdom by plane. It is a short non-stop flight: usually about 2-2.5 hrs flight time. Very few visits (5%) come to the UK by other means of transport i.e. by ferry crossings or through the Channel Tunnel.
- Annual seat capacity on non-stop flights grew to 24.6 million in 2019, before the pandemic brought a steep decline of 66% to just 8.3 million seats in 2020. The impact of the crisis was most strongly felt since April 2020.
- The regional spread of Spanish visitors is supported by the connectivity to many regional airports in the United Kingdom.
- Virtually all tour operators feature Britain either in a dedicated brochure or as part of a European programme.
- Generally tour operators use ground handlers in the UK.
- Meetings are often for the dissemination of information or the issuing of instructions rather than for open debate. Agendas, when used, will not necessarily be adhered to, as creativity and debate are favoured in such meetings.
- Personal relationships are very important to the Spanish and take time to build.

Source: Apex, International Passenger Survey by ONS

Almost all of visits from Spain to the UK are made by plane.





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Inbound market statistics

Chapter 1

1.1 Key statistics

Key insights

- Spain is the UK's fourth largest European source market, and fifth largest globally by volume of visits. In terms of visitor spending it ranks seventh (2019).
- In 2019, the UK was the 4th most popular destination of Spanish outbound overnight travel globally behind France, Italy and Portugal.
- In 2019, the UK welcomed 2.3 million visits from Spain contributing £977 million in visitor spending across the UK. On average, visitors residing in Spain spent £421 per visit in the UK; amongst those on holiday, £455 per visit.
- Almost four-in-five visits from Spain to the UK were made for leisure purposes in 2019. Holiday visits set a new volume record with more than 1 million holiday visits from Spain worth a total of £474 million (just shy of the 2018 record).
- The Spanish market over-indexes for visitation in low and shoulder season.
- London is the leading destination for a trip to the UK but the South East and South West are also popular based on the average nights spent in the UK in 2017-2019.
- The largest proportion of Spanish visitors who come to the UK reside in Madrid, Catalonia or Andalusia.

About 4-in-5
Spanish visits to the
UK are made for
leisure purposes.

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO. Please note that market-level inbound statistics have not been produced by the ONS for full-year 2020 as the IPS was suspended from mid-March; latest full-year inbound data is for 2019. More information is available here: <https://www.visitbritain.org/2020-inbound-data>



1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US\$bn)	27.9
Global rank for international tourism expenditure	11
Number of outbound overnight visits (m)	29.2
Most visited destination	France

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+5%	-13%	-5%
2009	2,215	17,316	1,033
2010	1,934	15,133	889
2011	2,122	15,388	982
2012	2,008	15,698	919
2013	2,020	17,131	1,095
2014	2,271	20,944	1,237
2015	2,252	17,312	1,028
2016	2,428	17,765	1,018
2017	2,275	15,778	1,003
2018	2,451	14,753	1,075
2019	2,319	15,006	977
Share of UK total in 2019	5.7%	5.2%	3.4%

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	2,319	-5%	5
Nights (000s)	15,006	+2%	4
Spend (£m)	977	-9%	7

Between January and March 2020, the UK welcomed 411,000 visits from Spain (down 22% on the first quarter of 2019), worth £174 million (down 5% on the first quarter of 2019).* The COVID-19 pandemic already impacted visitation from Spain to the UK in the first quarter of 2020 as both Spain and the UK introduced restrictions to counter the spread of COVID-19 in spring 2020.

Key metrics by journey purpose

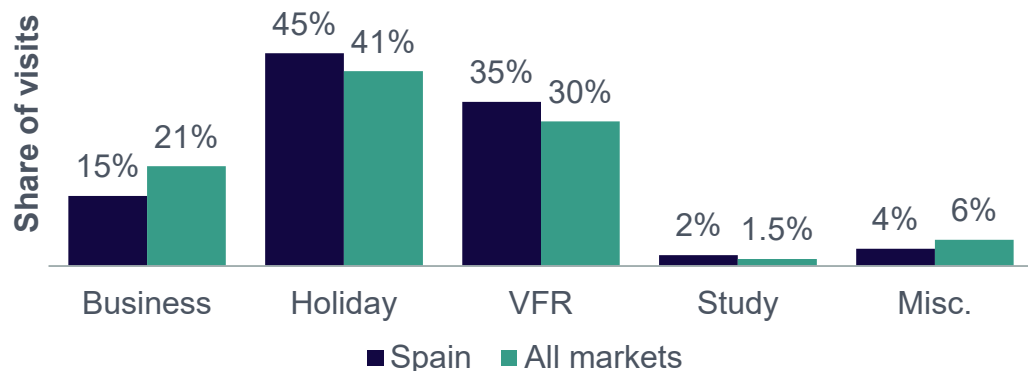
Averages by journey purpose in 2019	Nights per visit	Spend per night	Spend per visit
Holiday	5	£99	£455
Business	4	£112	£404
Visiting Friends/ Relatives	7	£48	£338
Study**	23	£50	£1,132
Misc.	26	£15	£382
All visits	6	£65	£421

Source: International Passenger Survey by ONS, *provisional data for January-March 2020, latest statistics at time of writing **small base



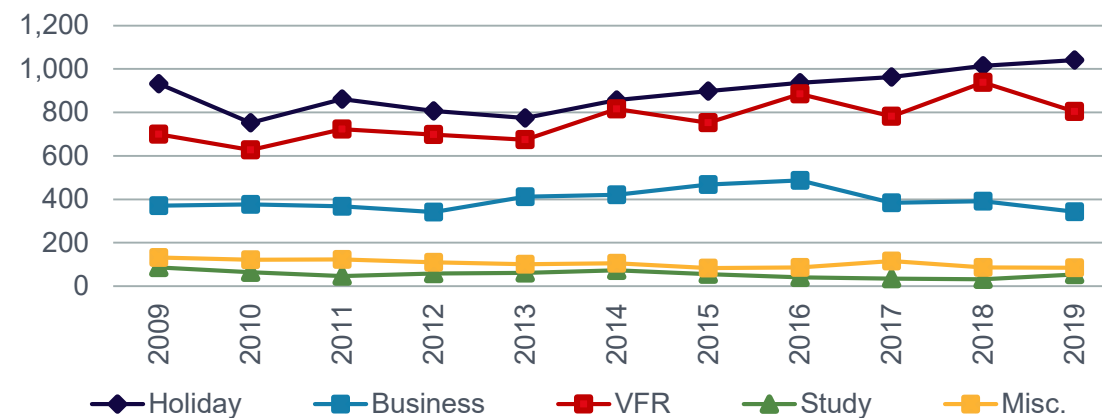
1.1 Key statistics: journey purpose

Journey purpose 2019



- Almost four-in-five visits from Spain to the UK were made for leisure purposes in 2019: The UK welcomed a record of more than 1 million holiday visits from Spain worth a total of £474 million (just shy of the 2018 record of £476 million). Almost 800,000 visits were made to see friends and/or relatives who reside in the UK, worth a total of £269 million.
- In 2019, more than three quarters of spending came courtesy of holiday visitors and visits to friends and/or relatives; business visitors contributed 14%. On average, visitors residing in Spain spent £421 per visit in the UK; on holiday this rises to £455 per visit.

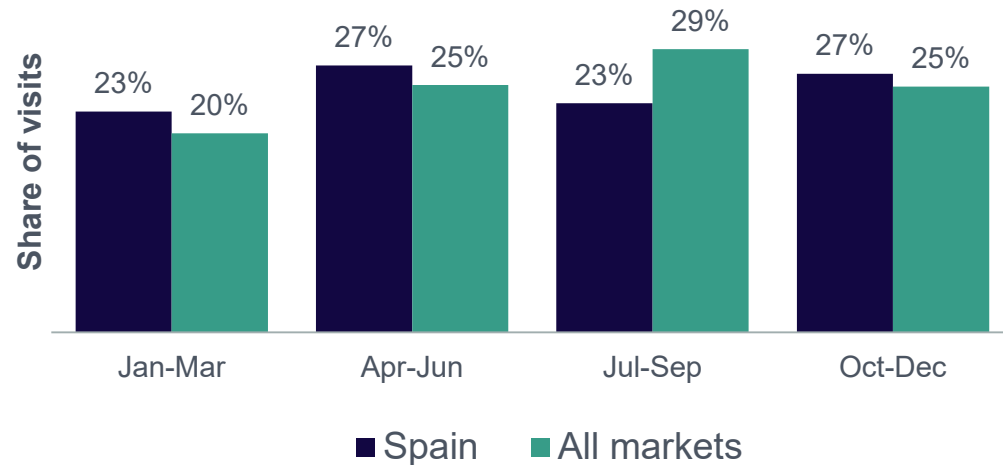
Journey purpose trends (visits 000s)



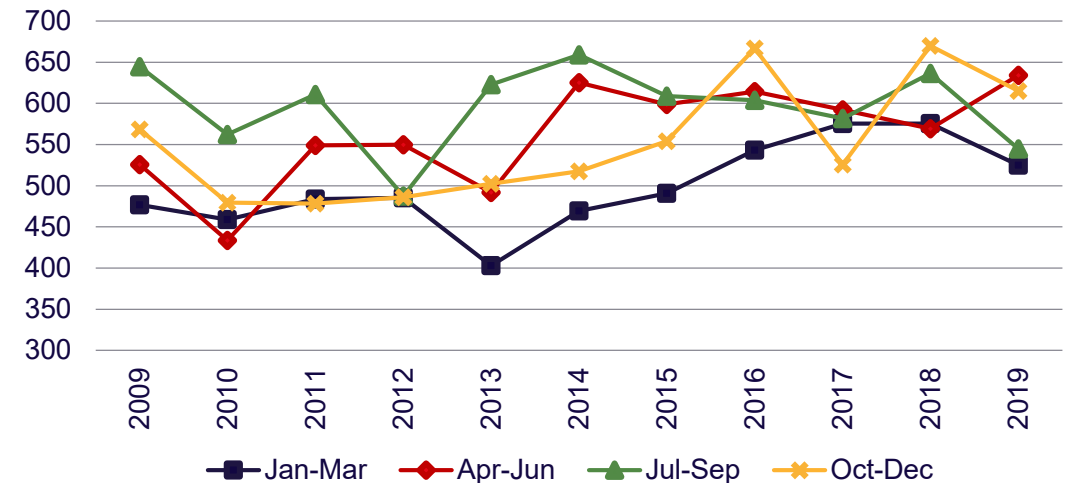
- Spanish business visits peaked in 2016 not far off 500,000 and outperforming previous peaks set ahead of the financial crisis. In 2019, business visits closed 30% lower in volume than the 2016 record.
- Visits to friends and/or family from Spain who reside in the UK performed well recently with a record year in 2018; however, these levels could not be matched in 2019. This journey purpose produces the highest proportion of repeat visits to the UK from the Spanish market.

1.1 Key statistics: seasonality

Seasonality 2019



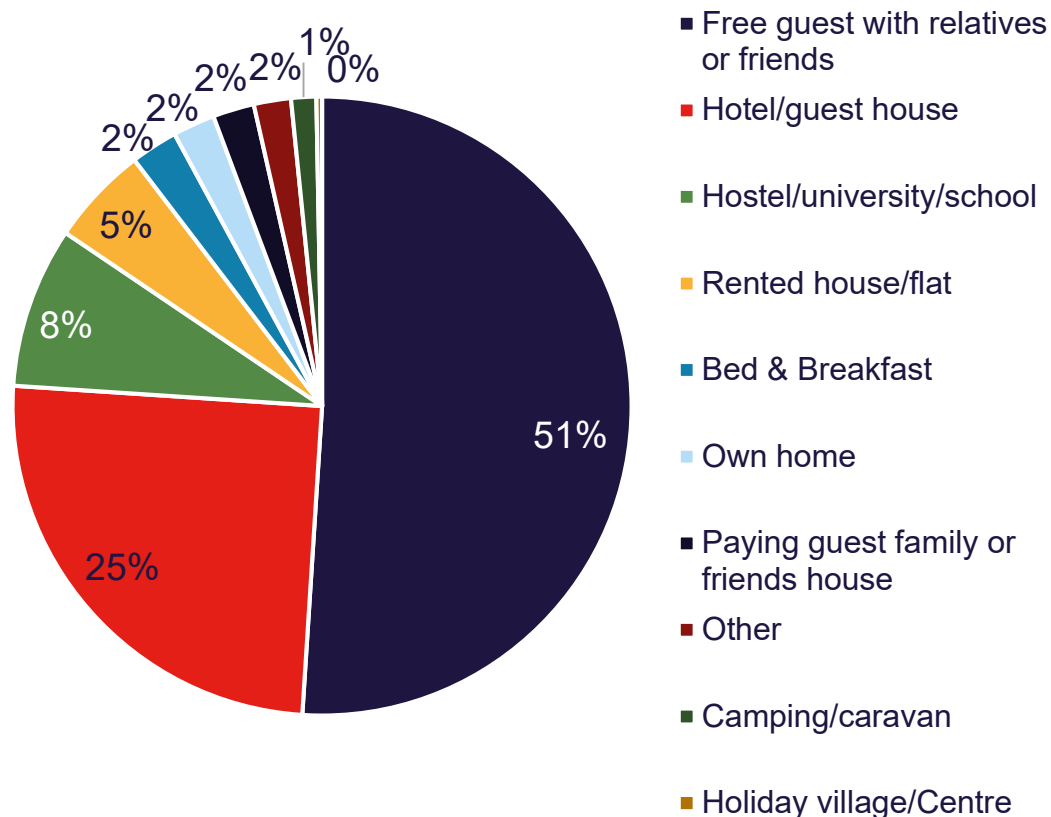
Seasonality trend (visits 000s)



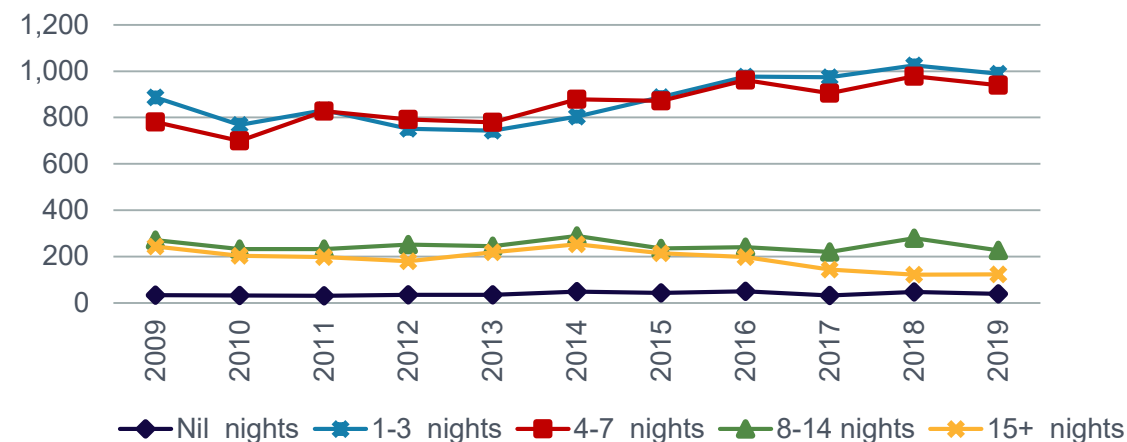
- For Spanish visits to the UK, the periods of April-June and October-December were the most popular in 2019 with more than a quarter of visits from Spain each conducted at these times of the year. Spanish visits over-index for visits made in shoulder or low season periods outside of the traditional high season.
- Whilst visits from Spain to the UK saw fluctuation in the volume of visits made at different times of the year, visits made in spring/early summer between April and June have set a new volume record in 2019 with 634,000 such visits worth a total of £260 million. When looking at the past decade, visits made to the UK at that time of year have seen the strongest growth in volume and value.

1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



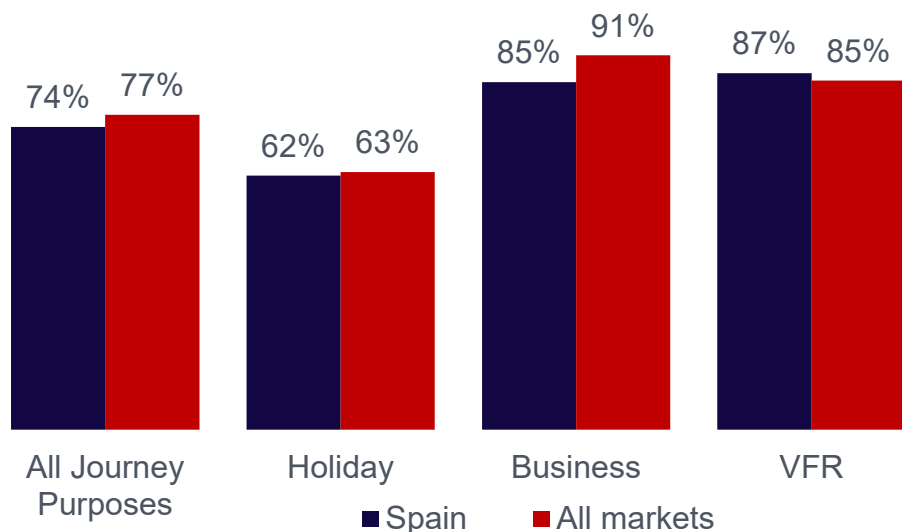
Duration of stay trend (visits 000s)



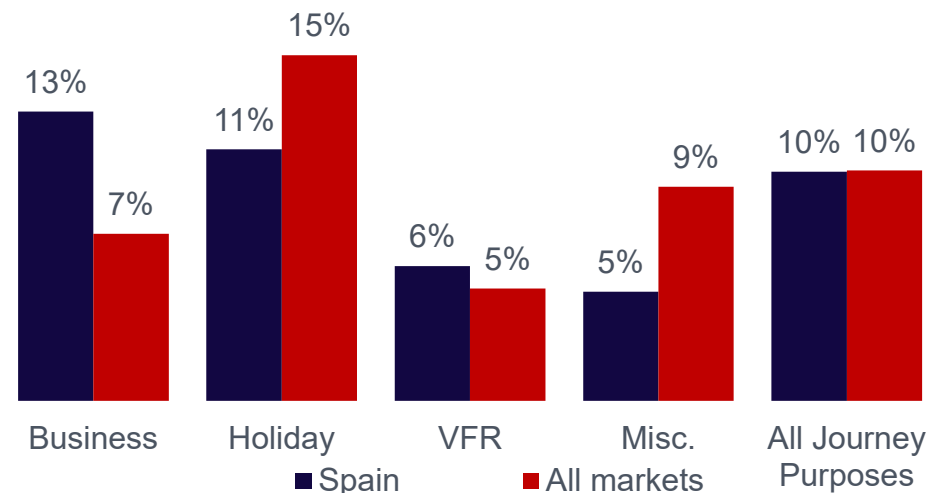
- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Spanish visitors. Both these trip durations stood at a record high in 2018, and not far behind in 2019. Visits of 8-14 nights were the next most popular length of stay prior to the pandemic.
- More than half of Spanish visitor nights spent in the UK in 2019 were as a free guest with relatives or friends, followed by a quarter staying at hotels or guest houses. 8% were spent at a hostel/ university or school accommodation, followed by 5% in a rented house or flat.

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- 62% of holiday visits from Spain to the UK in 2015 were made by repeat visitors (excl. UK nationals). These repeat visitors came on average between four and five times (a medium average visit frequency compared to other markets) and spent on average £2,156 in the UK in the past ten years.
- The highest proportion of repeat visitors were among those coming to visit friends and/or relatives who live in the UK (87%) and among business visitors (85%).
- Only one-in-ten Spanish visits to the UK are likely to be bought as a package or all-inclusive tour in 2019 with business visits over-indexing on this metric. Most Spanish visits to the UK remain independently organised.

International Passenger Survey by ONS. *2015, excluding British nationals;

**See definition of a package holiday [in appendix](#)

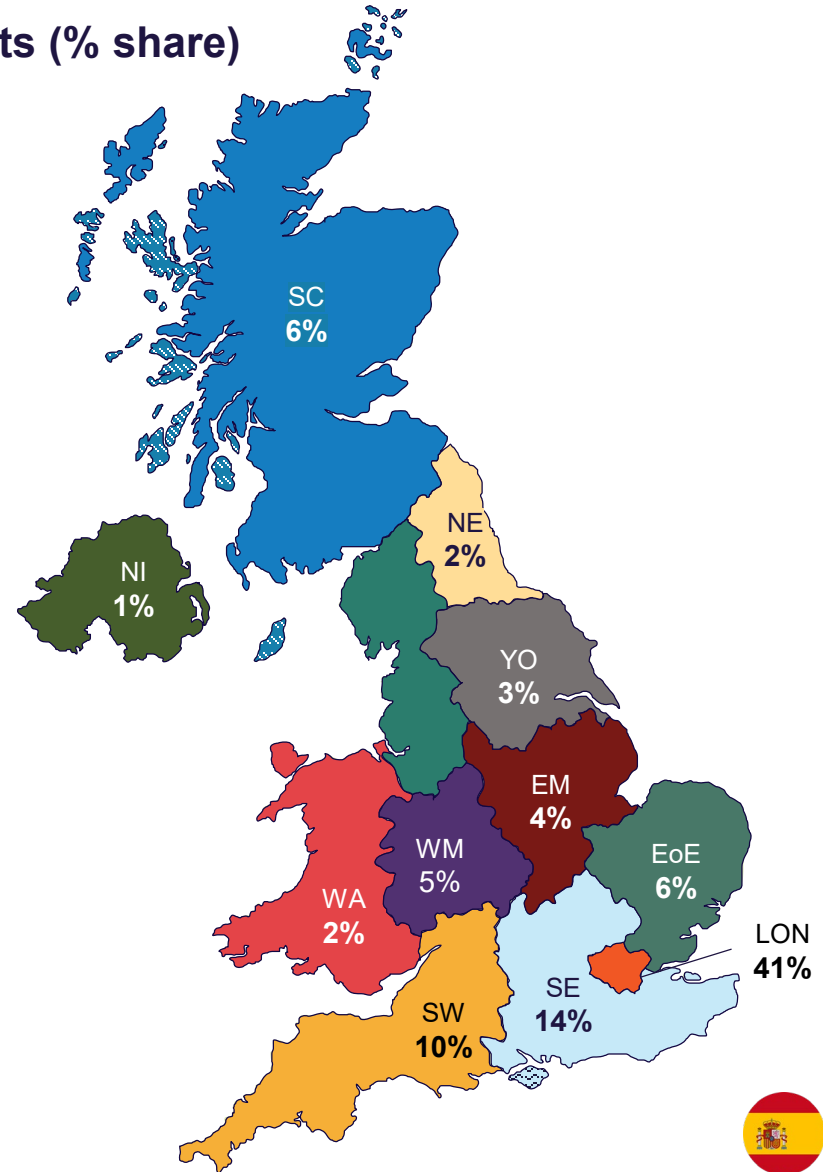
1.2 Getting around Britain



Annual visits to the UK (2017-2019 average)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	15,179	2,348	1,019
Scotland (SC)	868	145	78
Wales (WA)	360	47	15
Northern Ireland (NI)	110	20	8
London (LDN)	6,228	1,193	538
North East (NE)	260	37	16
North West (NW)	1,106	184	63
Yorkshire (YO)	475	71	24
West Midlands (WM)	754	132	38
East Midlands (EM)	538	79	26
East of England (EoE)	847	147	53
South West (SW)	1,495	160	59
South East (SE)	2,119	313	96
Nil nights (Nil)	N/A	40	3

Nights (% share)



Source: International Passenger Survey by ONS



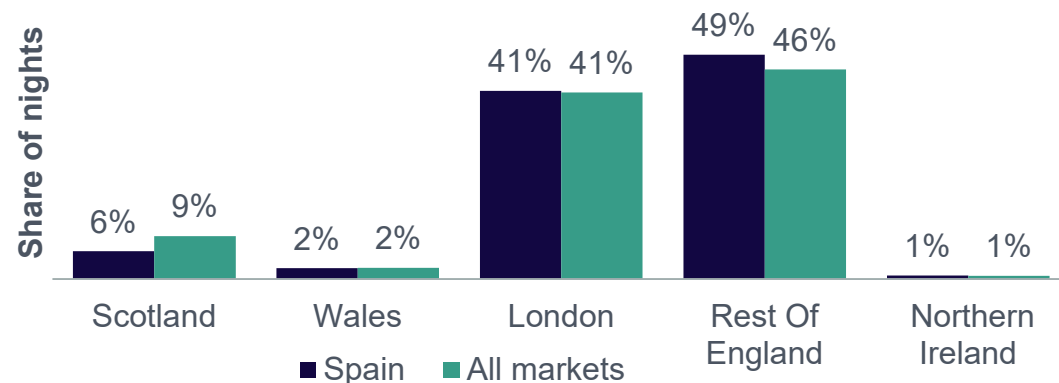
1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2017-2019 average)

Town	Visits (000s)
London	1,199
Edinburgh	112
Manchester	76
Bristol	63
Liverpool	51
Birmingham	51

- London is the leading destination for a trip to the UK, accounting for just over two in five Spanish visitor nights (in line with the all-market average), but the South East and South West are also popular based on the nights spent in the UK in 2019.
- In 2019, London welcomed 1.2 million visits from Spain (on par with 2018) worth £488 million in visitor spending in the capital (down 18% on record spending in 2018).
- Half of Spanish visitor nights are spent in England outside London, an above-average proportion.
- Those visiting friends and/or family in the UK are the most likely to feature rural and coastal areas in their visit.

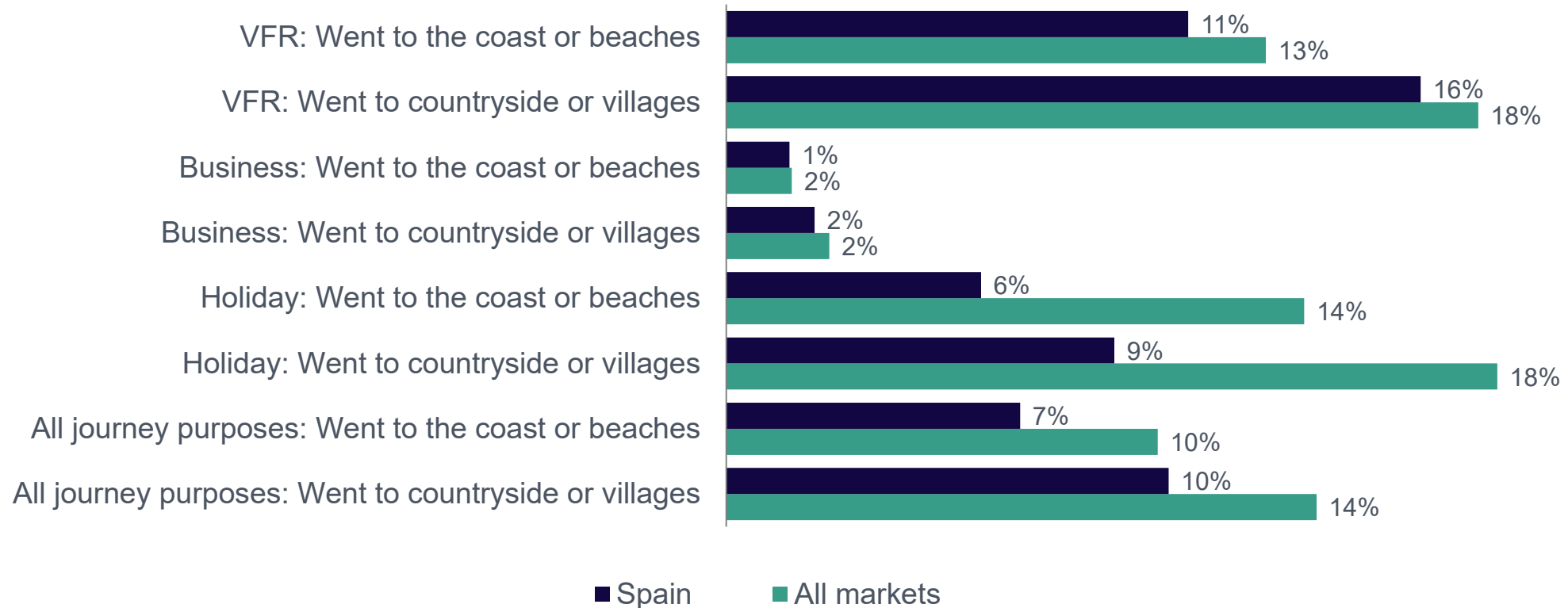
Regional spread 2019



Source: International Passenger Survey by ONS

1.2 Getting around Britain: visits to coast, countryside and villages

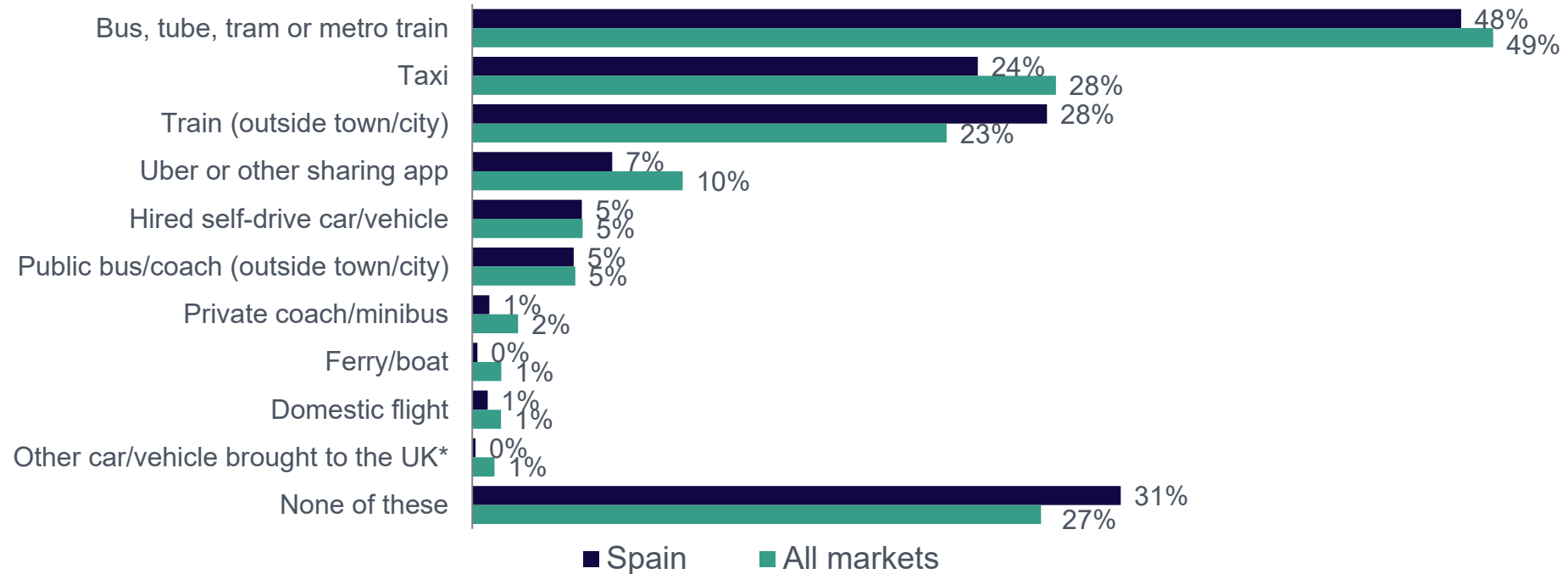
Propensity to visit coast, countryside and villages



- One-in-ten Spanish visits are likely to go to the countryside or villages as part of their visit and 7% to the coast or beaches. The propensity is higher among those who come to see their friends or relatives in the UK.

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport



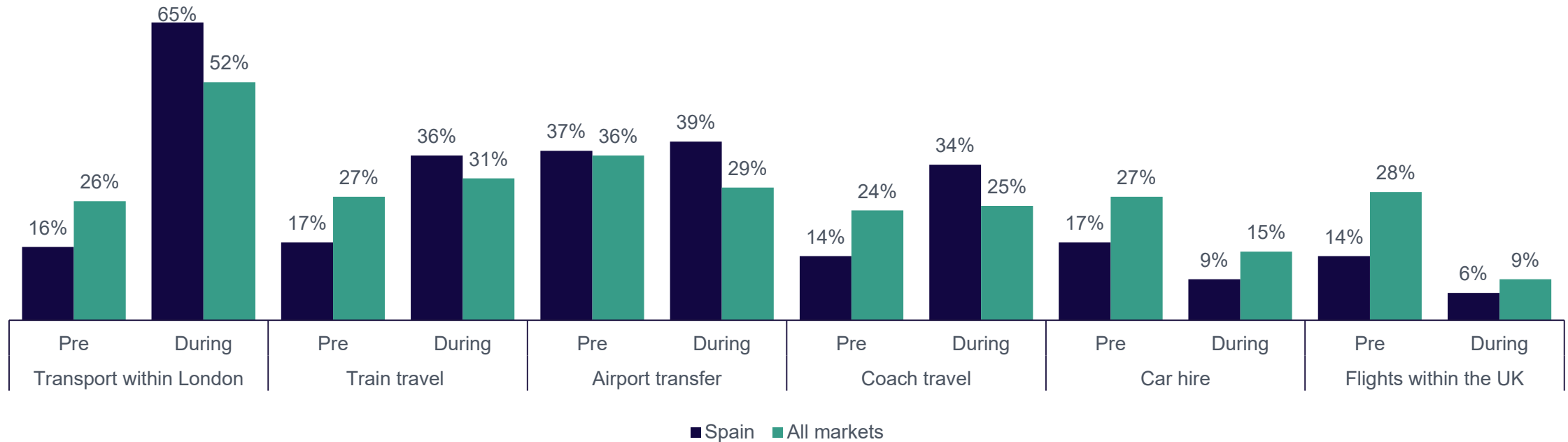
- Almost half of the Spanish have a propensity to use bus, tube, tram or metro trains during their visit in the UK.
- They have an above-average share to take a train outside towns/cities with more than a quarter likely to use this mode of transport. For all other internal modes of transport listed, they are either in line with the all market average or have a below average propensity to use them while in the UK.

Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for “car/vehicle you/group brought to the UK”



1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



- A large proportion of Spanish respondents buy their tickets for transport in Britain whilst they are here. This is particularly true for transport within London, and at some distance followed by airport transfers, train travel and coach travel for which Spanish visitors over-index for purchase during their stay.
- Airport transfers are the method of transport which are most likely to be pre-booked with 37% of Spanish visitors doing this in advance of their trip.

1.3 Visitor demographics

Visitor characteristics

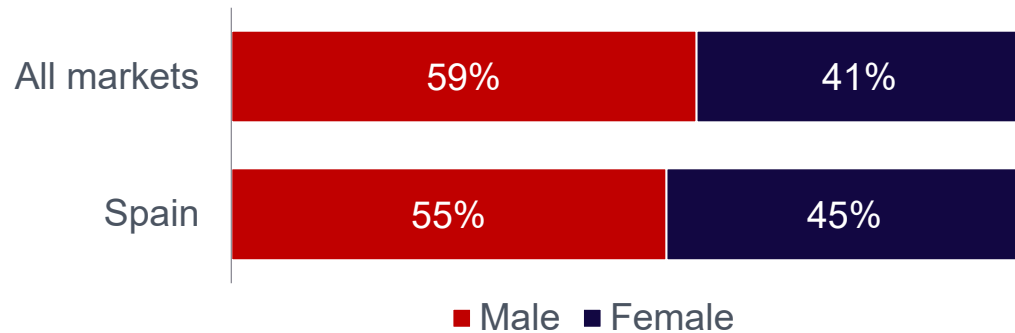
- More than a third of Spanish visits to the UK are made by visitors under the age of 35. The cohort of 45 to 54 makes up the largest volume of visits from Spain to the UK, closely followed by those aged 35-44. The cohort of those aged 55-64 set new records for volume and value in 2019 now worth a total of £131 million. The volume of visits made from Spain to the UK by younger visitors aged 16-24 also set a new record in the same year.
- There is a tendency of more men visiting the UK than women, especially among business visitors; however, visitors coming for miscellaneous purposes have a higher share of women than men.
- Almost half (47%) of visits made from Spain to see friends and relatives (VFR) residing in the UK are British nationals.
- Close to two in five visits from Spain are by travellers on their own. More than a third visited with their spouse or partner – an above-average share. They also over-index for bringing their children on a trip to the UK.
- The largest proportion of Spanish visitors who come to the UK reside in Madrid, Catalonia or Andalusia.

62%

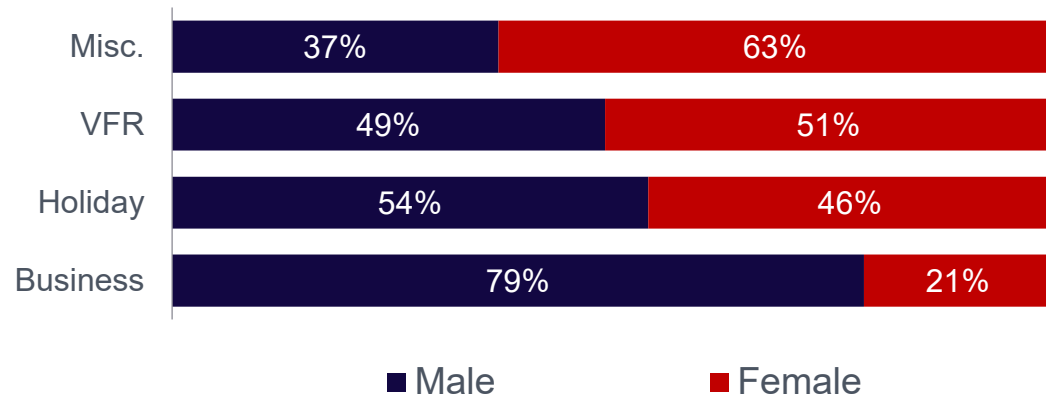
of Spanish
holiday visitors
have been to the
UK before*

1.3 Visitor demographics: gender and age groups

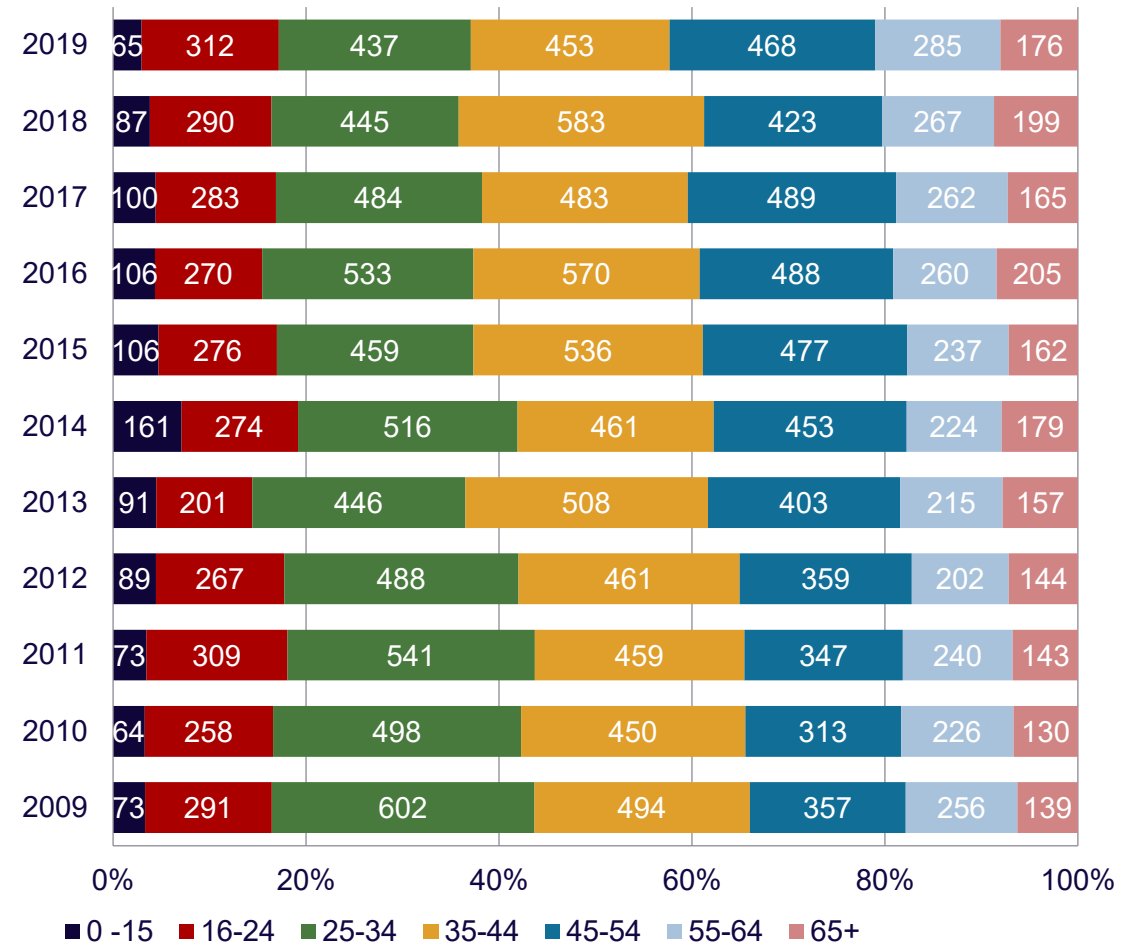
Gender ratio of visits (2019):



Gender ratio of visits from Spain by journey purpose (2019):



Age group trend (visits in 000s)

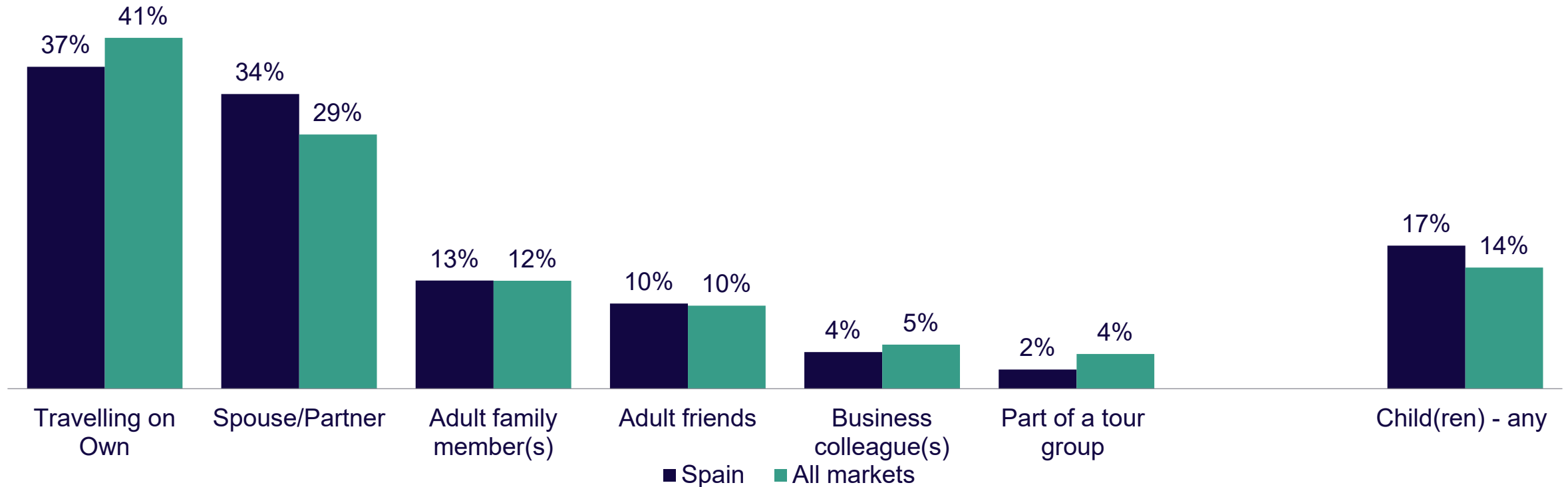


Source: International Passenger Survey by ONS



1.3 Visitor demographics: travel companions

Who have Spanish visitors to the UK travelled with?



- Close to two in five visits from Spain are by travellers on their own, more than a third visited with their spouse or partner – an above-average share.
- Visitors from Spain are broadly aligned with other markets on the proportion of other travel companions like other members of the family, friends or colleagues, but stand out with an above-average share of those who travel with children.

Source: International Passenger Survey by ONS, 2017. "Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?"

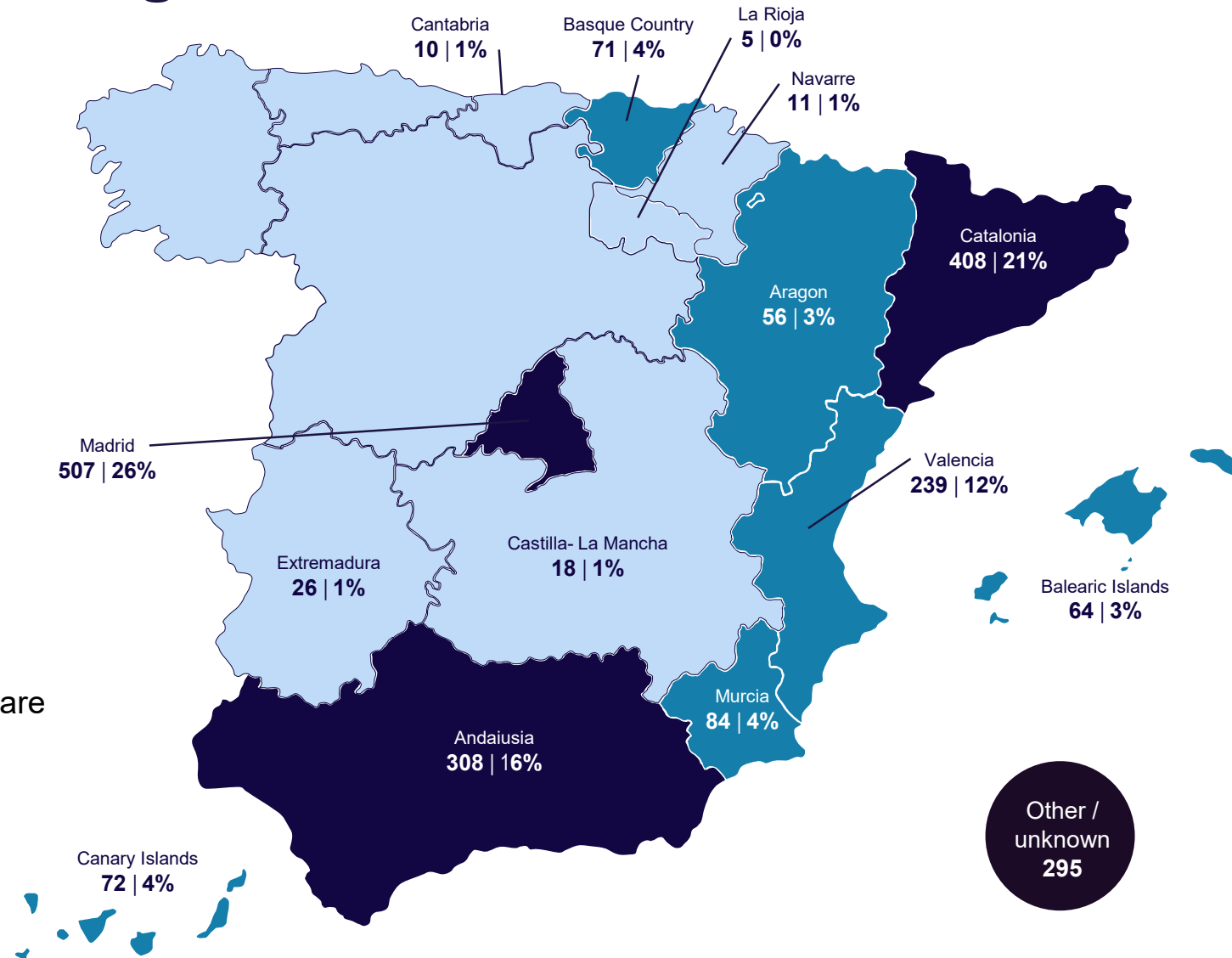
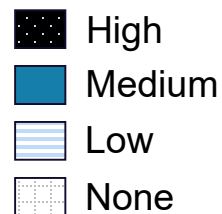


1.3 Visitor demographics: origin

Visits to the UK

- The largest proportion of Spanish visitors who come to the UK reside in Madrid, Catalonia or Andalusia (2015).
- The largest urban areas are: Madrid with 6.7 million, Barcelona (5.6 million) and Valencia (835,000). (2021)

Visits in 000s | % share of visits



1.4 The UK and its competitors (1)

Market size, share and growth potential

- In 2019, the UK was the 4th most popular destination of Spanish outbound overnight travel globally behind France, Italy and Portugal, and ahead of Germany, Morocco and the USA.
- In a highly competitive set of destinations within Europe, the UK is projected to struggle to keep its market share. Portugal is expected to make the most gain by 2029 out of the set, while France is forecast to see a slight decline.
- Despite the severe shorter-term impact of the COVID-19 pandemic, visits from the Spanish market are forecast to grow by 23% comparing 2019 and 2030, and Spanish visitor spending in the UK by 55% in the same timeframe, which would see the Spanish market reach nearly 3 million visits and more than £1.5 billion in visitor spending by 2030.
- Of those who came to Britain for a holiday, 40% considered France, 30% Ireland and 24% Germany as an alternative holiday destination.
- In 2019, the Spanish took almost 194 million trips and spent more than €48 billion according to INE. Most of these trips were to Spanish destinations with only 10% going abroad, but their spend abroad made up a third of total spent in 2019. In 2020, the Spanish took just under 102 million trips overall, a decrease of 48% on 2019 due to the pandemic. International trips accounted for just 5% of the total.

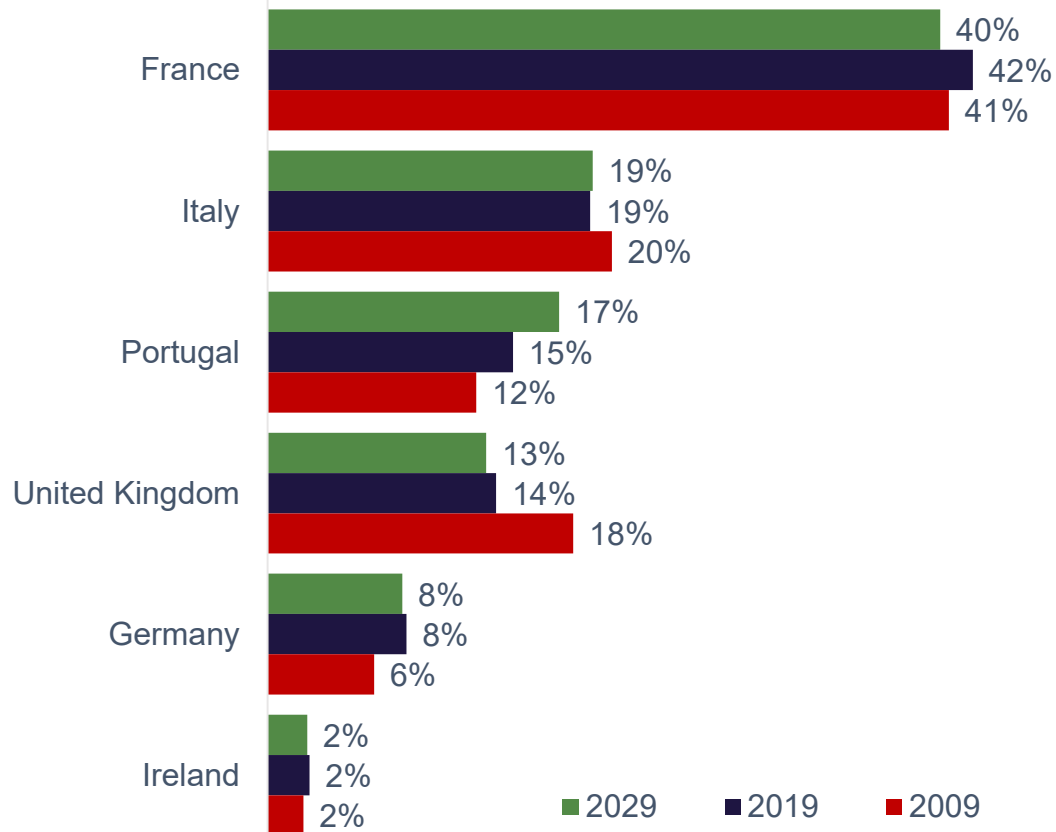
The UK ranks
4th
for Spanish outbound
overnight visits

Source: Oxford Economics, forecast with VisitBritain adaptations, VisitBritain/IPSOS 2016, INE 2019 and 2020 as cited in [ep data 2021](#) and [ep turismo](#). Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

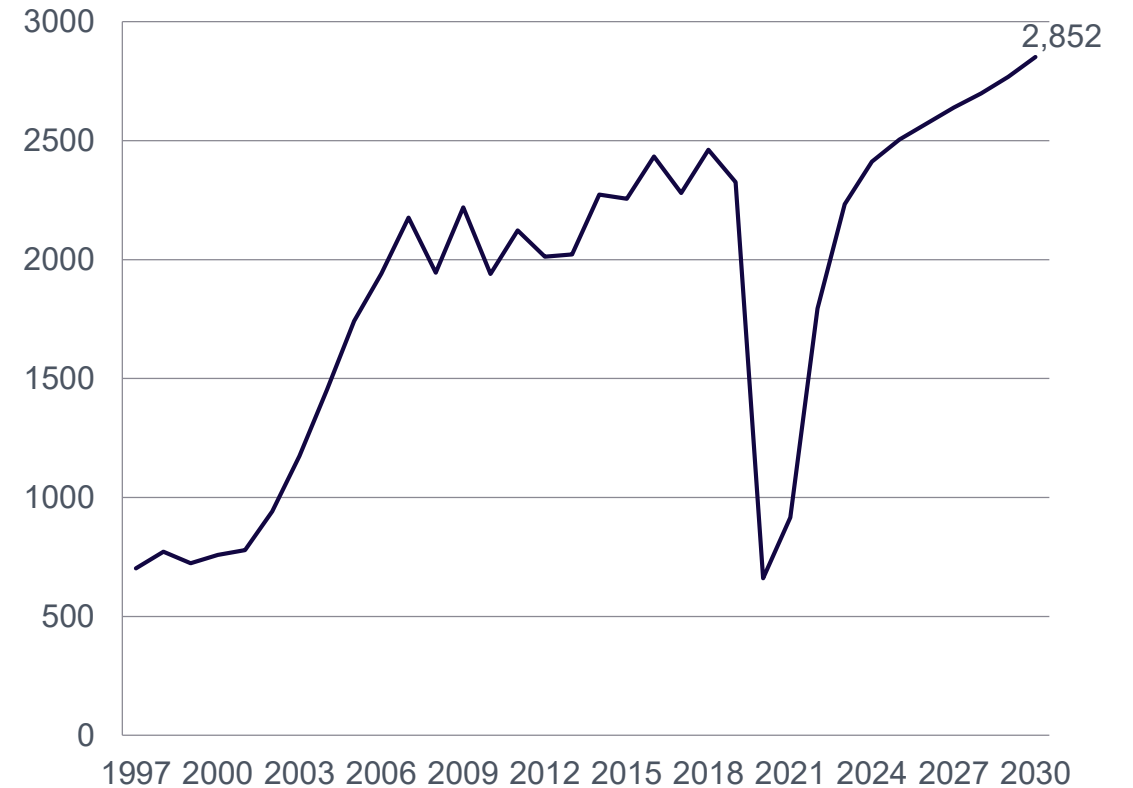


1.4 The UK and its competitors (2)

The UK's market share of Spanish visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.





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Experiences and perceptions

Chapter 2

2.1 Inbound activities: summary

- Almost three in five Spanish visits involve dining in restaurants; more than half feature shopping. Going to the pub is also very popular and a third of Spanish visits involve socialising with locals.
- Sightseeing is the most popular activity for two thirds of Spanish holiday visitors. More than half visit parks or gardens, or involve a trip to museums or art galleries. Almost as many visit castles or historic houses. More than a quarter of Spanish on holiday in the UK go on a guided tour; almost one-in-ten would feature a visit to a literary, music, TV, or film location. Almost a quarter of Spanish holidaymakers enjoy walking in the countryside.
- Around 48,000 Spanish visits per annum feature time watching live football.
- 98% of Spanish visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.
- The Spanish rate the UK highly for culture overall, contemporary culture, sports, vibrant cities and built and cultural heritage.

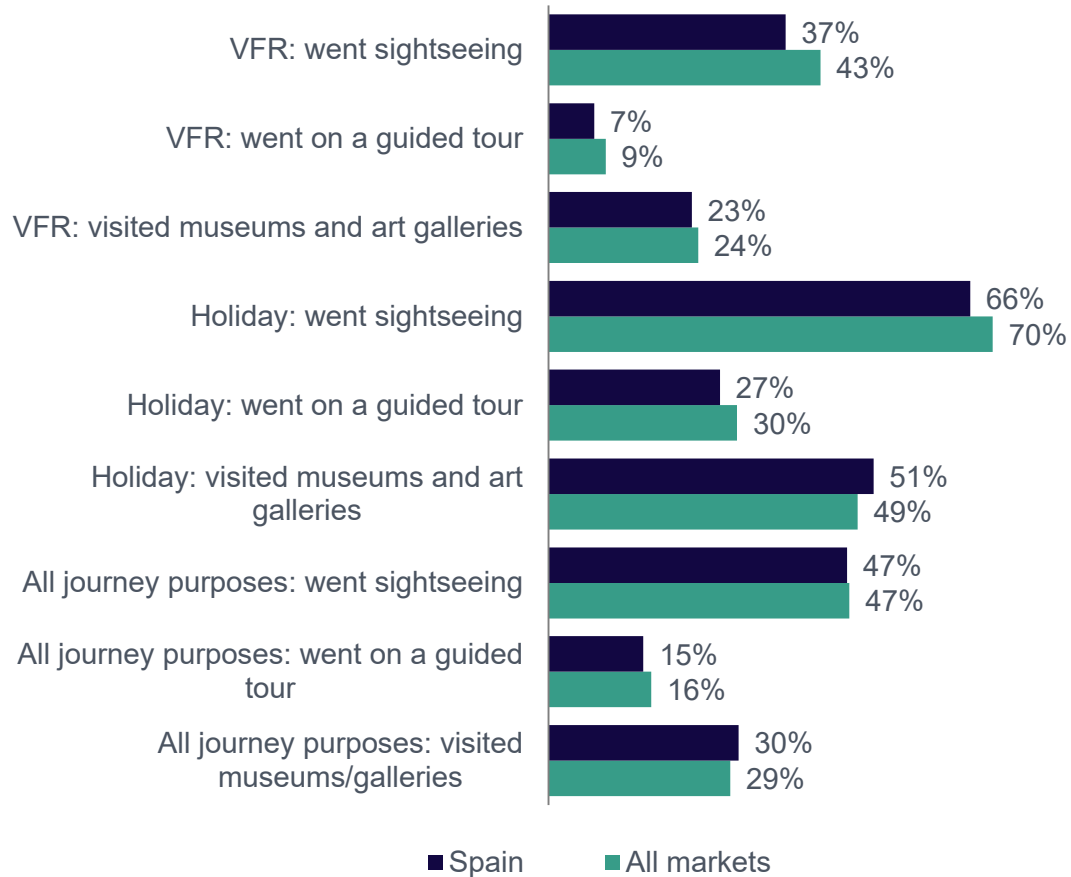
Top 10 activities for Spanish visitors during their visit to the UK

-  1. Dining in restaurants
-  2. Going shopping
-  3. Sightseeing famous monuments/ buildings
-  4. Going to the pub
-  5. Visiting parks or gardens
-  6. Socialising with locals
-  7. Visiting museums or art galleries
-  8. Visiting castles or historic houses
-  9. Visiting religious buildings
-  10. Walking in the countryside

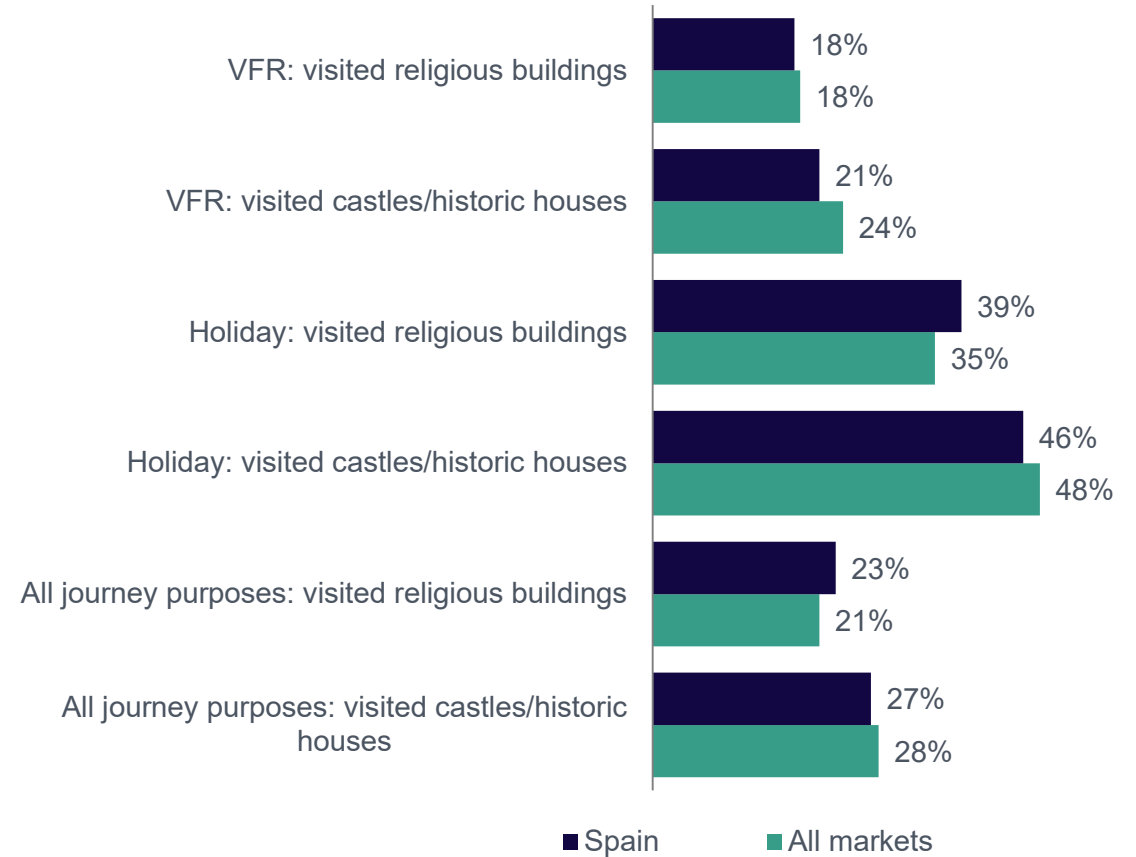
For more information on activities, please visit our webpage of [activities undertaken in Britain](#)

2.1 Inbound activities: tourism and heritage

Propensity to go sightseeing, visit museums and galleries or to go on a guided tour

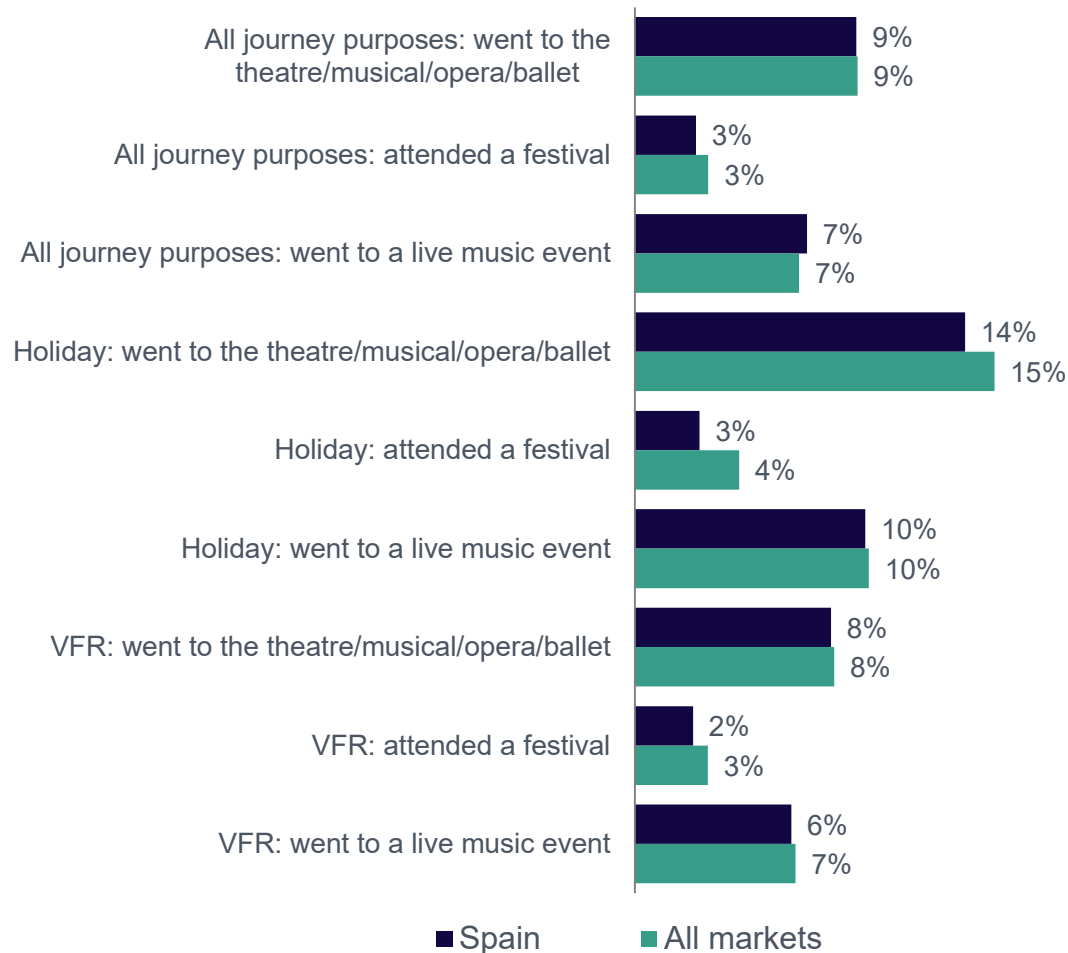


Propensity to visit built heritage sites

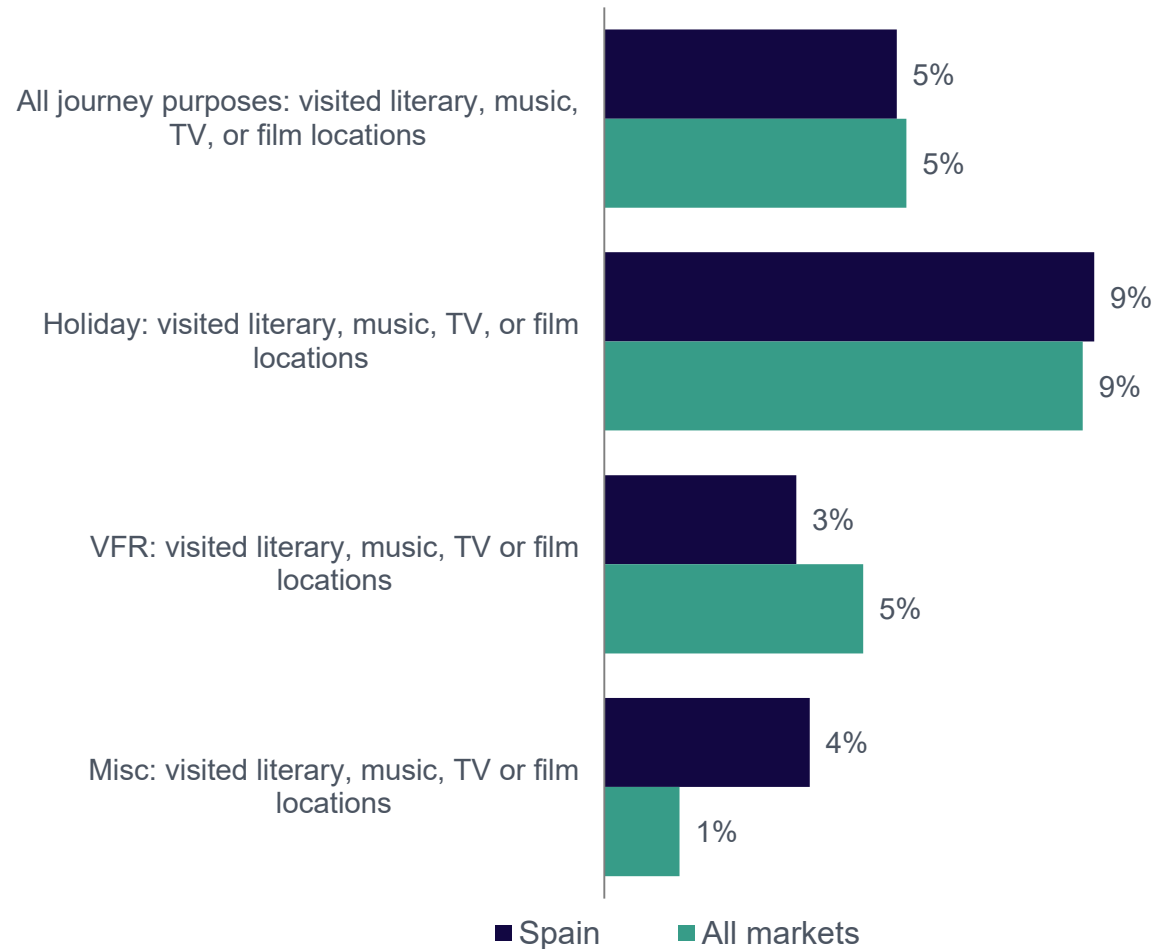


2.1 Inbound activities: culture

Propensity to attend the performing arts



Propensity to visit literary, music, TV, or film locations

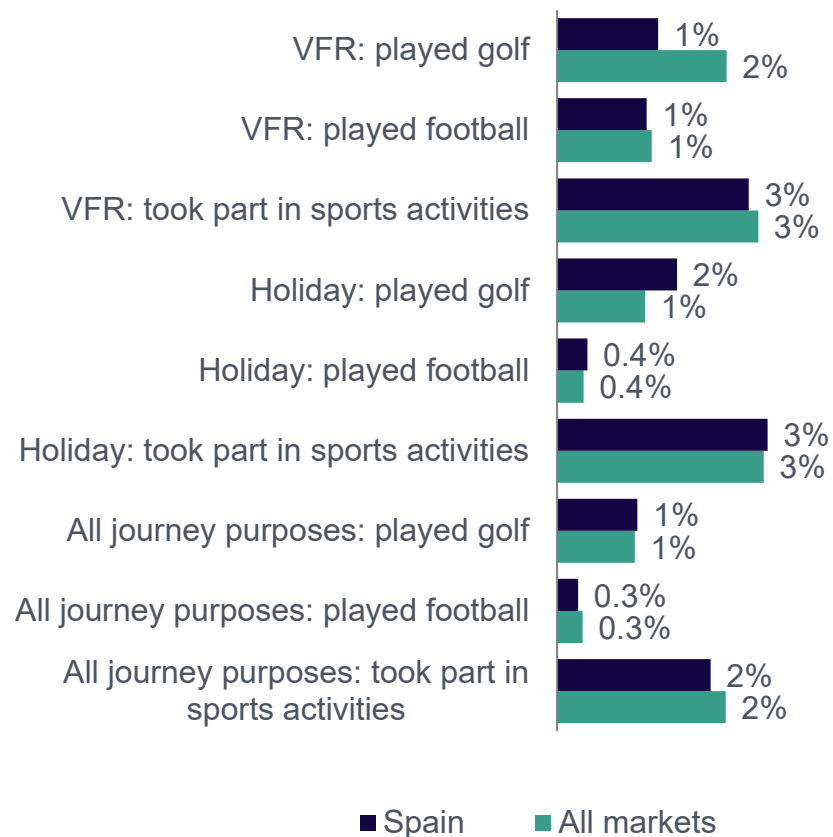


Source: International Passenger Survey by ONS, 2016 (performing arts)

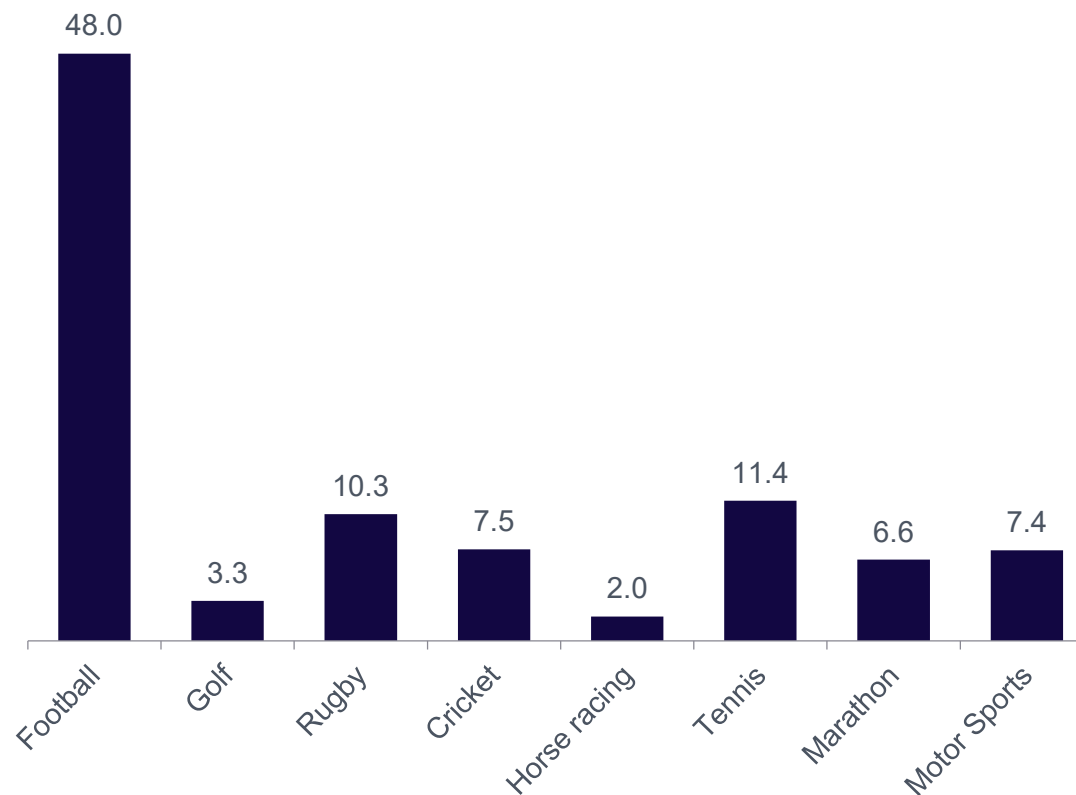


2.1 Inbound activities: sports

Propensity to partake in sports-related activities



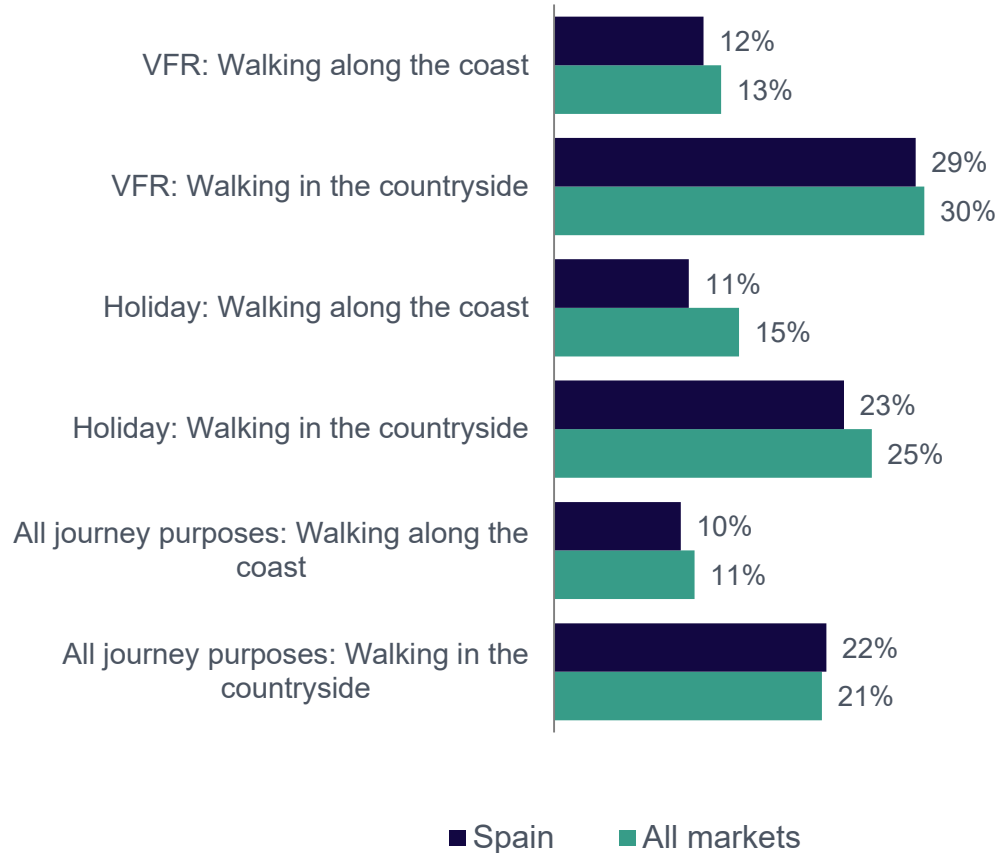
Number who watched sports live during trip (000s)



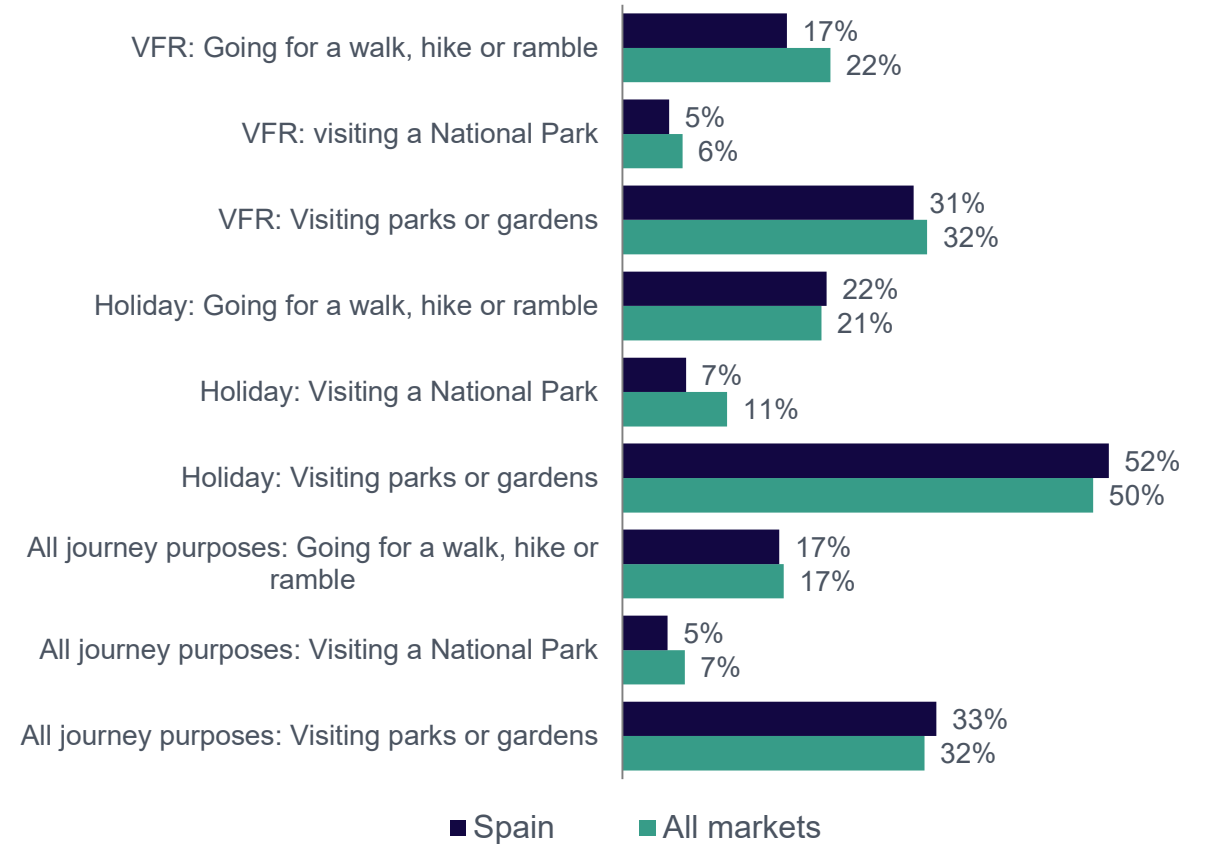
Source: International Passenger Survey by ONS, 2011, 2014 and 2019 (watched sports live)

2.1 Inbound activities: outdoors

Propensity to go walk along the coast or in the countryside



Propensity to enjoy the outdoors

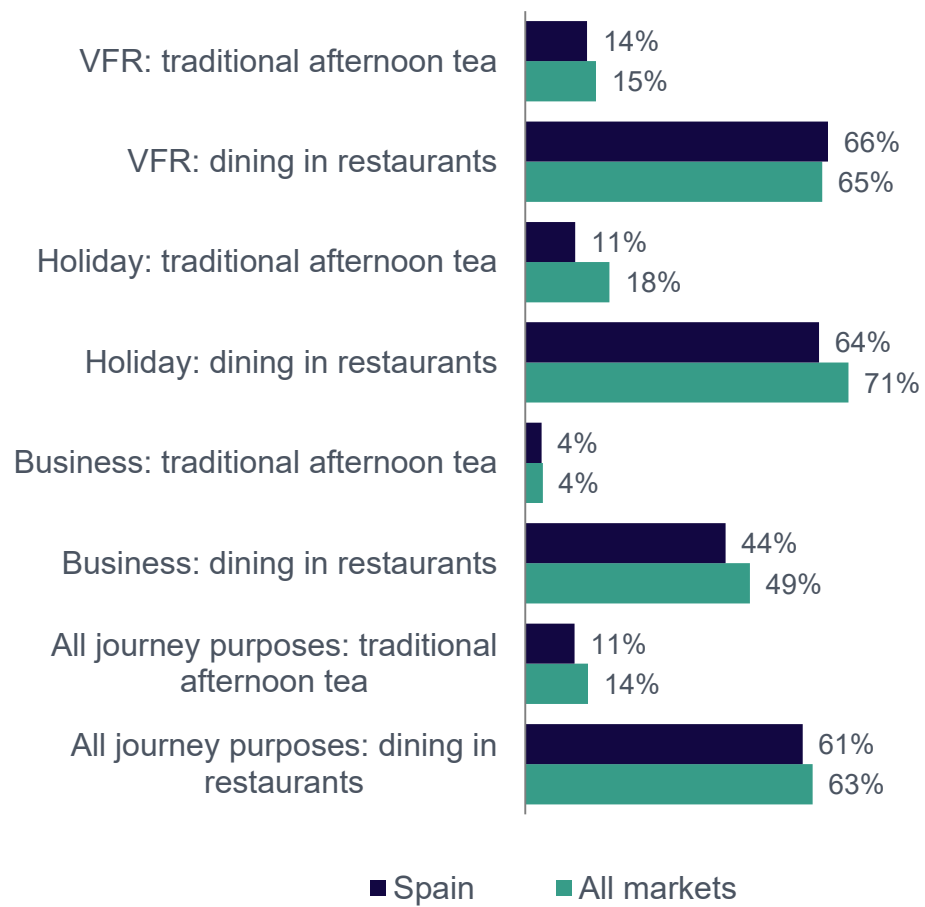


Source: International Passenger Survey by ONS, 2019 (walking along the coast/in the countryside), 2016 (visiting parks and gardens and a national park), 2014 (hiking/rambling)

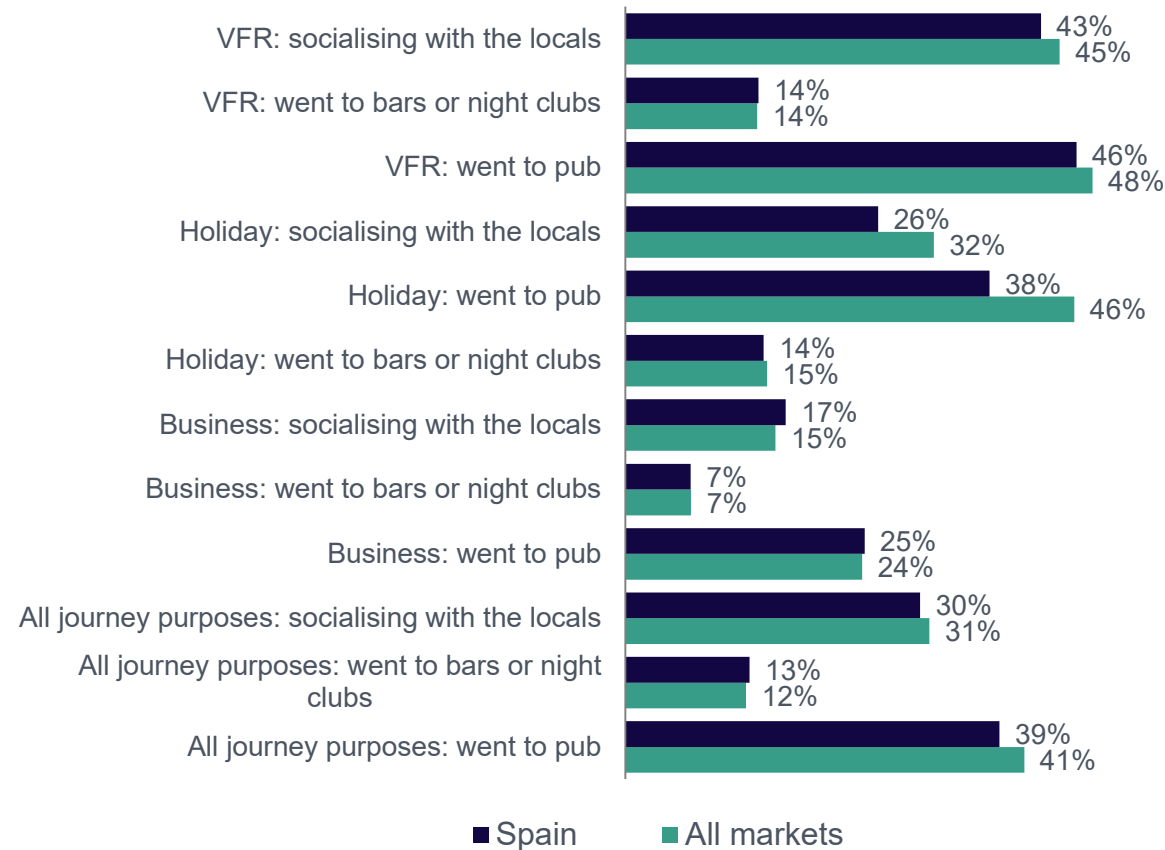


2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



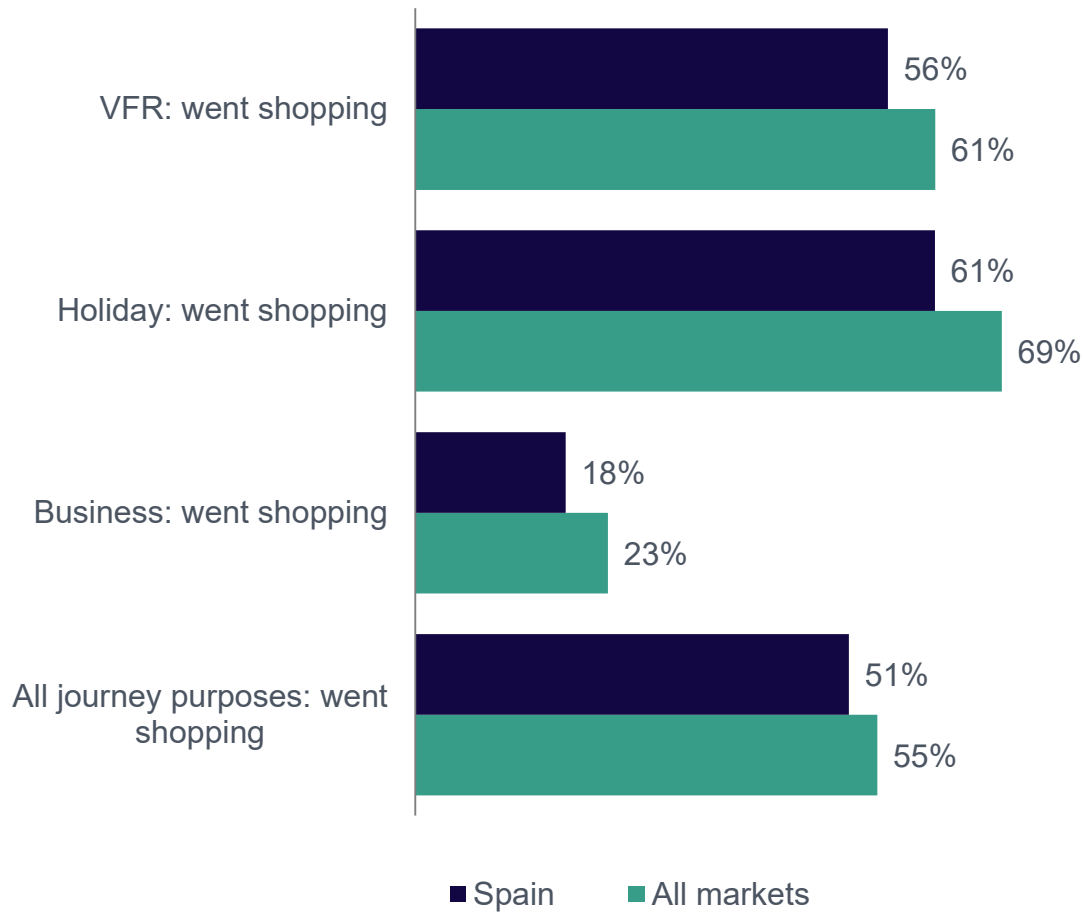
Propensity to go to the pub or bars and night clubs, or to socialise with locals



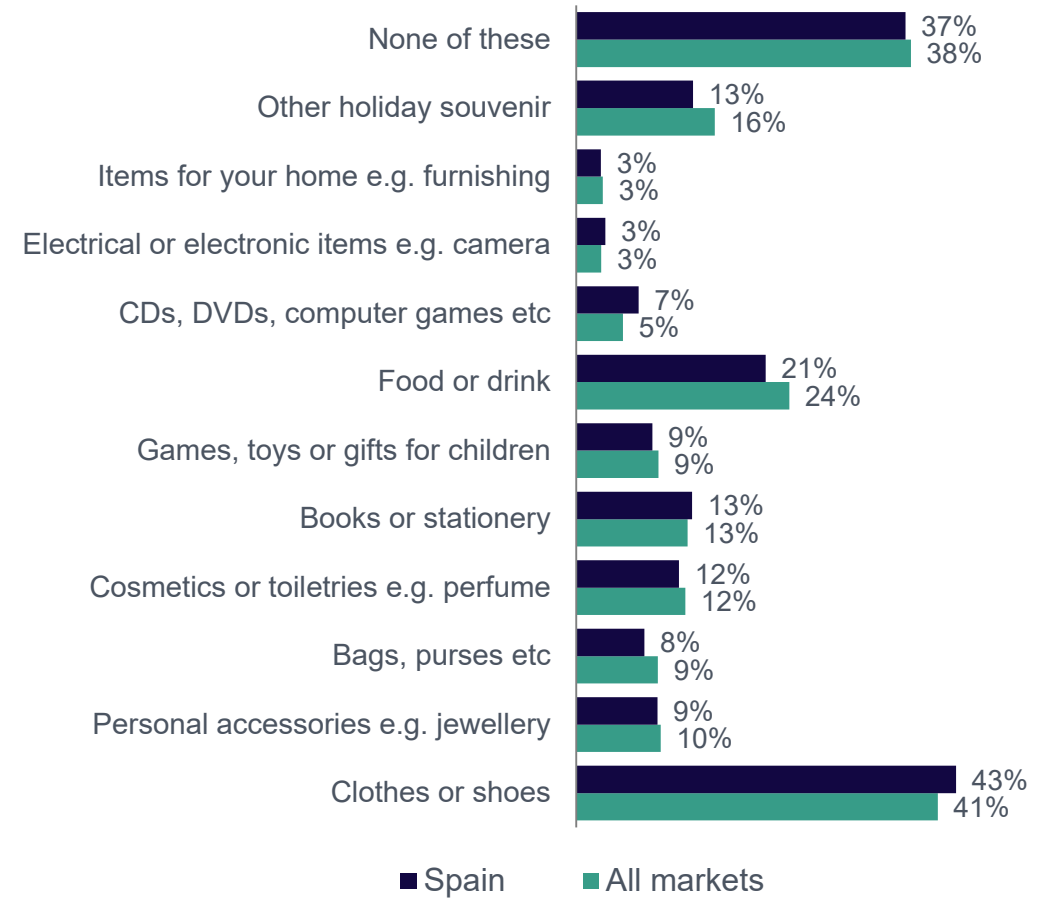
Source: International Passenger Survey by ONS, 2019 (dining in restaurants and having a traditional afternoon tea) and 2017 (all other activities)

2.1 Inbound activities: shopping

Propensity to go to shopping



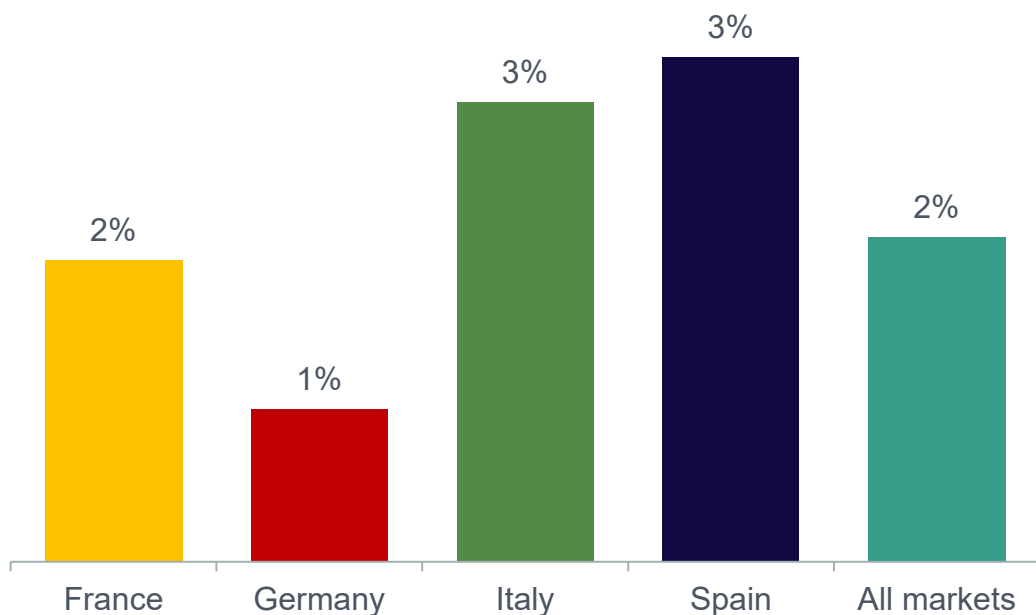
Propensity to purchase selected items



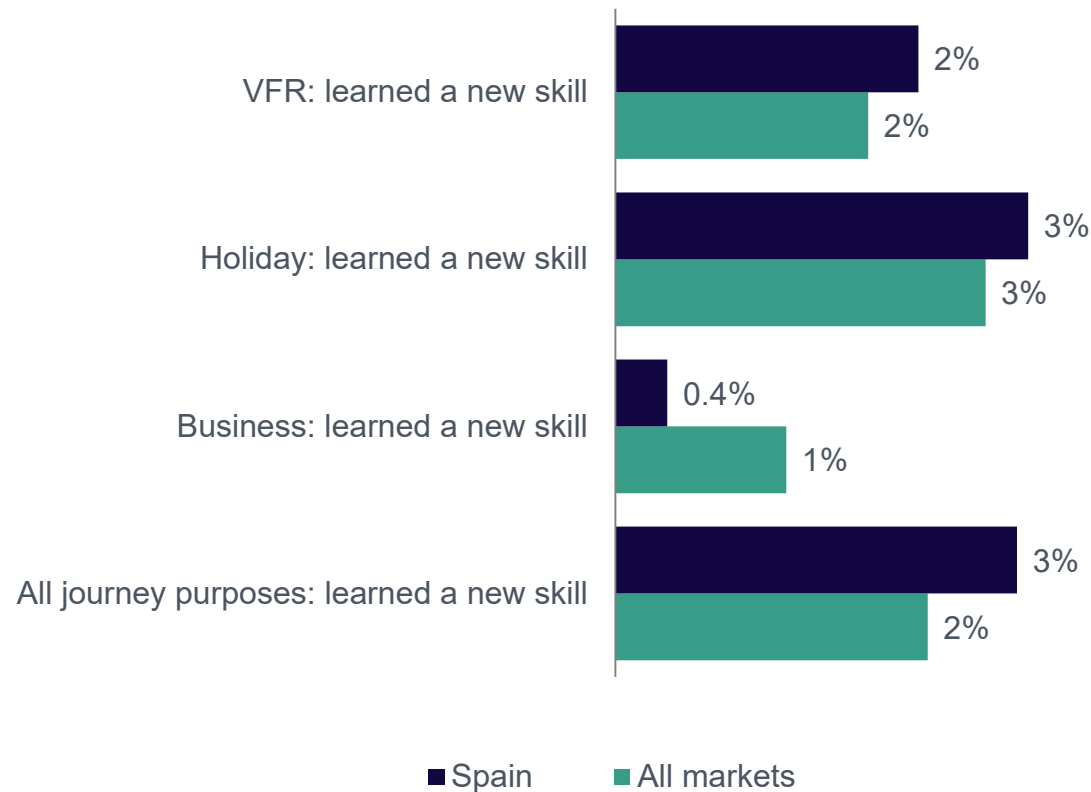
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items)

2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK (share of all visits)



Propensity to learn a new skill or craft



Source: International Passenger Survey by ONS, 2019 (new skills/craft), 2018, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.



2.2 Experiencing a visit to the UK

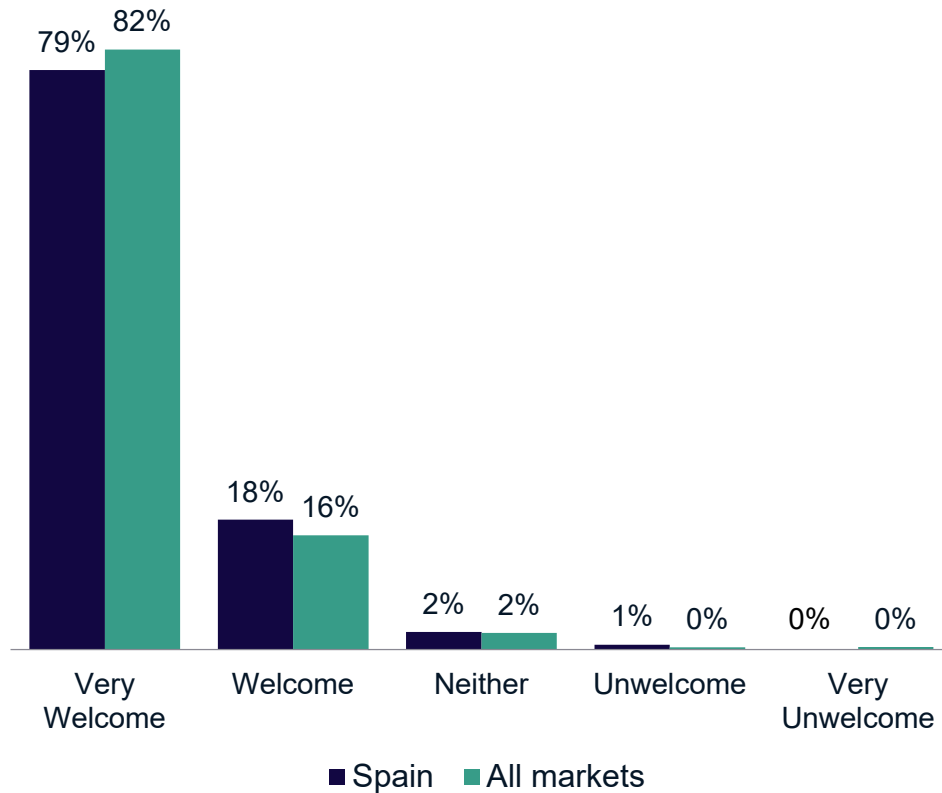
- Almost eight in ten visitors from Spain felt very welcome during their stay in the UK. A similar share of Spanish visitors were very likely to recommend a stay in the UK for a holiday or a short break at the end of their visit.
- Propensity to feel welcome is slightly below the all-market average among Spanish visitors and in line with it for the propensity to recommend the UK.
- Asked for reasons which would encourage the Spanish to travel back to the UK for a holiday, close to two-in-three said that they would like to visit a different part of the UK than on a previous trip, followed by half who are attracted back by the prospect of visiting sights/attractions they did not get to see on their last visit(s). The ease of getting to the UK also features among the list of motivations for more than one-in-three, as well as the desire to experience an activity they did not participate in previously, and the ease of getting around while in the destination. A quarter of the Spanish think that the UK caters well for tourists and would come back as a result. Almost one-in-five would visit an attraction/sight again that they have taken a visit to when in the UK previously.

While the Spanish are highly motivated by local food and drink for returning to a destination, this aspect features much lower down the list of reasons when thinking about a return trip to the UK.

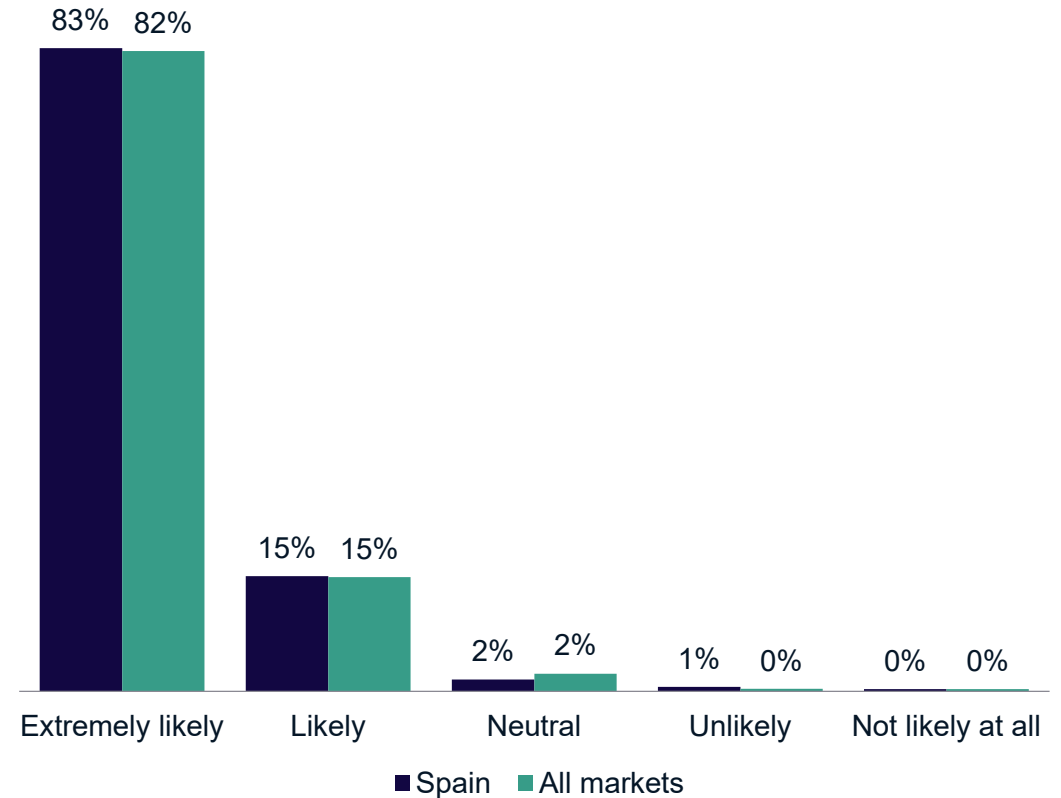
98%
of Spanish visitors
would recommend a
holiday or short
break in the UK*

2.2 Welcome and recommending Britain

Feeling of 'welcome' in Britain

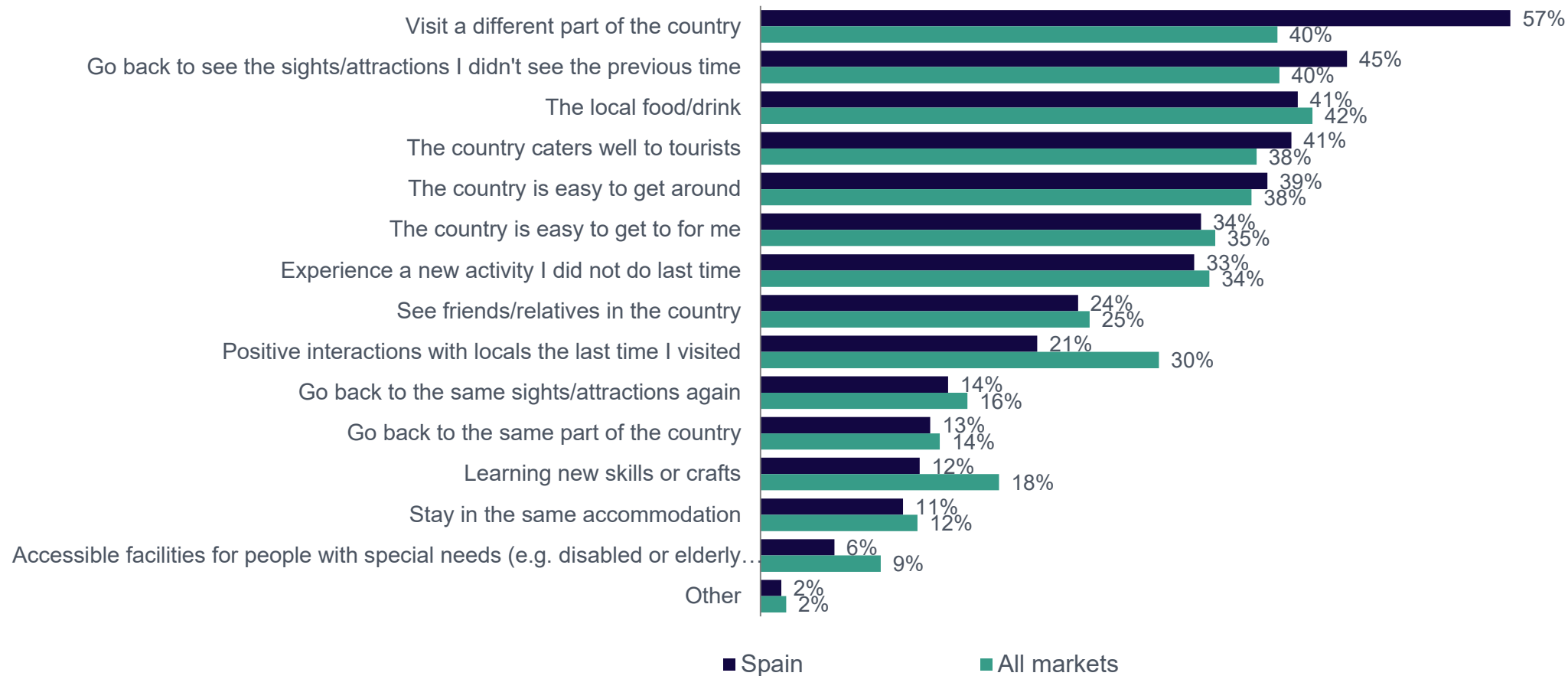


Likelihood to recommend Britain



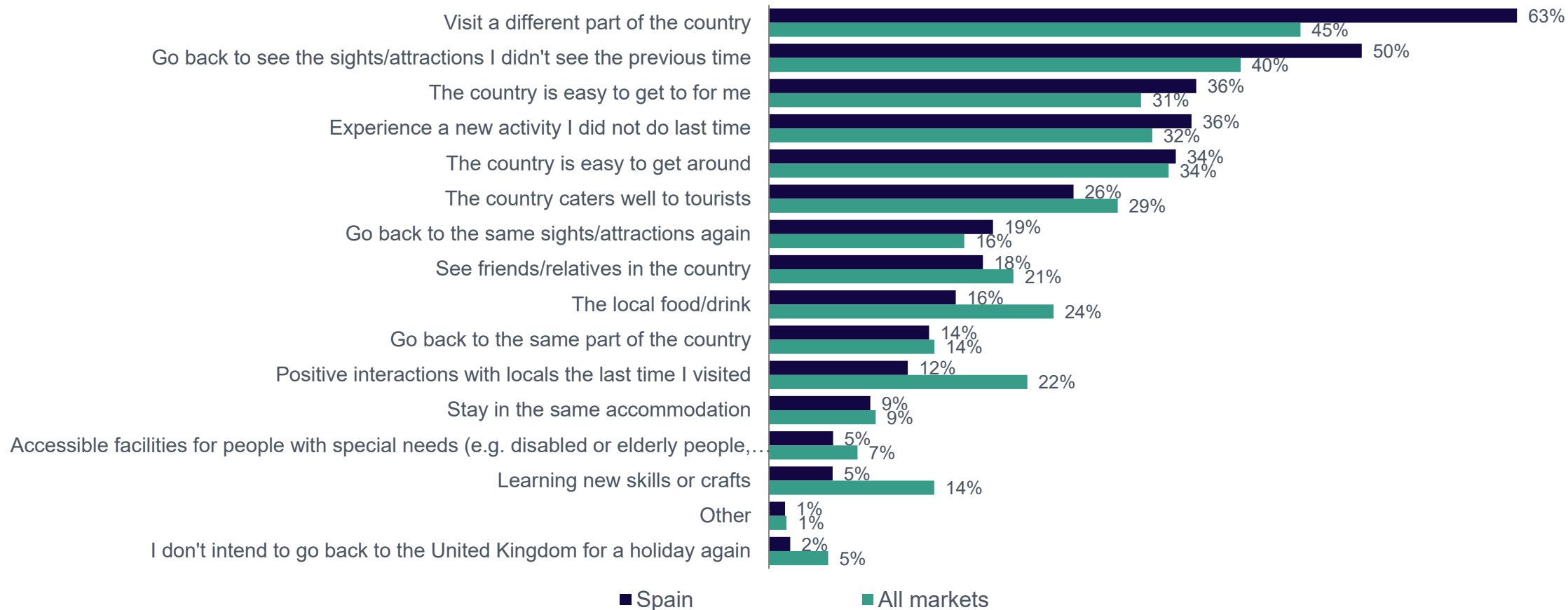
2.2 Reasons to return to a holiday destination

Reasons to return to a destination in general



2.2 Reasons to return to the UK

Reasons to return to the UK



2.3 Perceptions of the UK (1)

- The Spanish rate the UK highly for culture overall, contemporary culture, sports, vibrant cities and built and cultural heritage, but less so for scenic beauty and welcome; the UK is rated 33rd and 26th out of fifty nations on these two attributes respectively.
- Museums are the cultural products or services the Spanish most strongly associated with the UK, followed by music, films and sport.
- A trip to the UK would be expected to be 'Educational' (40%) as well as 'Exciting' (31%) and 'Fascinating' (29%) by the Spanish.
- Italy, the US, France and Australia are the destinations that Spanish consider the 'best place' for delivering the things they most want from a holiday destination.
- A major draw for Spanish holiday visitors is the ease of getting to Britain from Spain, followed by cultural attractions. A quarter of Spanish visitors chose Britain as a holiday destination for its different culture, vibrant cities and due to the ease of getting around while staying in Britain.
- Activities that appeal to potential visitors from Spain include taking a canal boat tour in England, taking a street art tour in one of Britain's modern cities, a visit to Windsor Castle, a food tour of one of London's best foodie markets, spotting wildlife in the Scottish Highlands or staying the night in a fairy-tale castle.

Areas of strength for the UK:

**Contemporary
culture, culture in
general, vibrant
city life and sports**

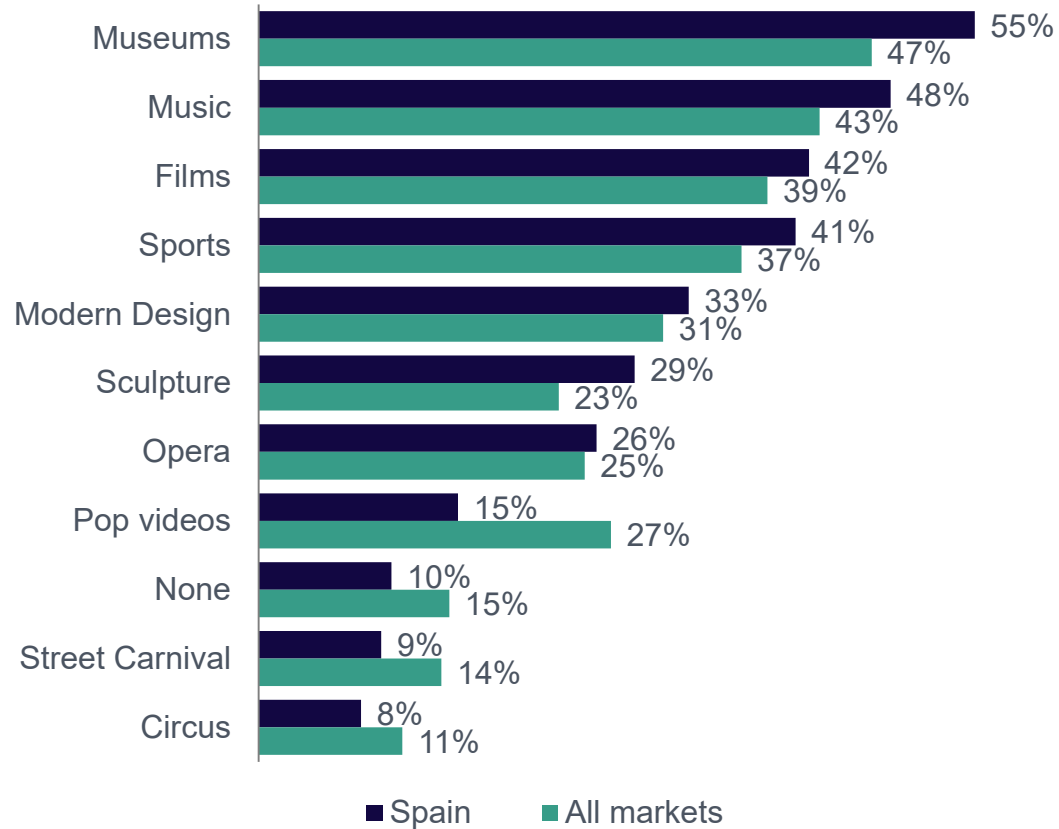
2.3 Perceptions of the UK (2)

UK's ranking (out of 50 nations) - 2019

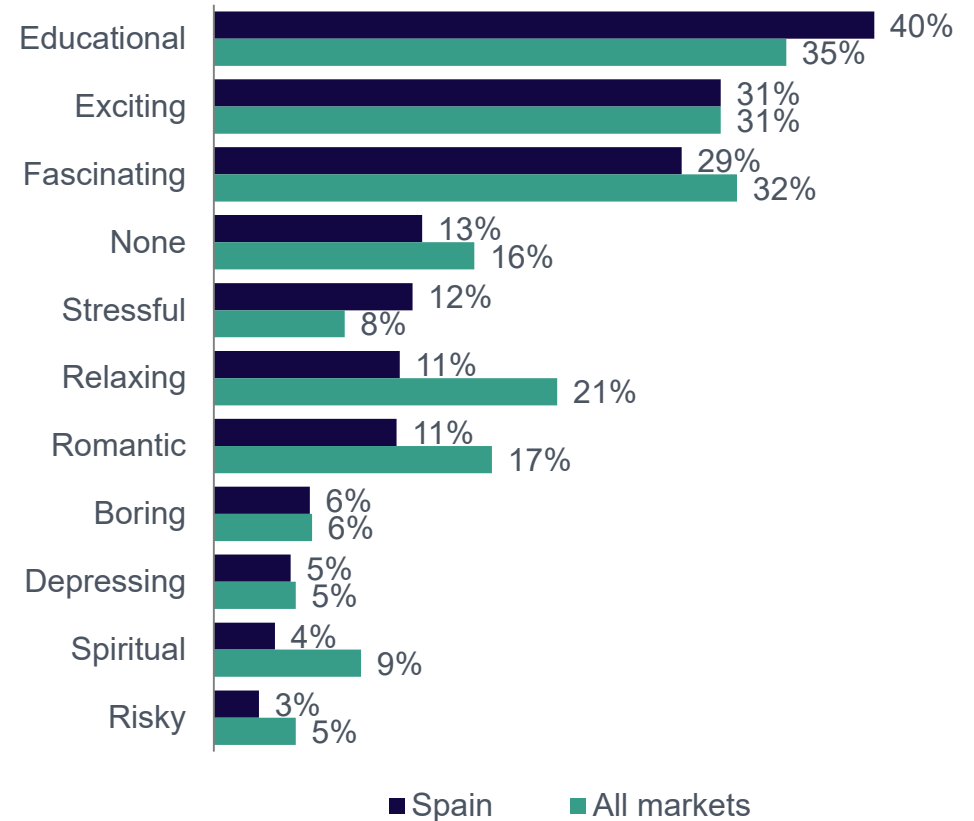
Measure	Spanish respondents	All respondents
Overall Nation Brand	7	4
Culture (overall)	5	5
The country has a rich cultural heritage	8	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	5	3
The country excels at sports	5	5
People (overall)	20	7
If I visited the country, the people would make me feel welcome	26	16
Tourism (overall)	7	4
Would like to visit the country if money was no object	19	6
The country is rich in natural beauty	33	26
The country is rich in historic buildings and monuments	6	5
The country has a vibrant city life and urban attractions	5	4

2.3 Perceptions of the UK (3)

Cultural associations



Adjectives describing a potential trip to the UK



2.3 Perceptions of the UK (4)

Holiday wants and % saying destination is best place for... top 20

Importance	Perception	GB	FR	IT	AU	US	GE
6.14	Offers good value for money	16%	19%	28%	10%	16%	14%
6.06	Have fun and laughter	12%	15%	34%	18%	36%	13%
6.06	Enjoy the beauty of the landscape	22%	36%	41%	58%	28%	22%
5.96	Explore the place	18%	28%	37%	33%	33%	13%
5.91	Do something the children would really enjoy	18%	33%	21%	22%	44%	12%
5.88	Enjoy local specialities (food and drink)	11%	41%	54%	10%	15%	16%
5.85	See world famous sites and places	33%	51%	65%	15%	34%	28%
5.84	Experience activities/places with a wow factor	20%	26%	39%	41%	48%	18%
5.83	Have dedicated time with my other half	31%	53%	55%	31%	33%	26%
5.82	Broaden my mind/ Stimulate my thinking	22%	26%	31%	39%	42%	22%
5.76	The people are friendly and welcoming	15%	21%	43%	21%	22%	13%
5.75	Enjoy peace & quiet	13%	23%	28%	29%	10%	8%
5.74	Visit a place with a lot of history/historic sites	27%	47%	74%	9%	17%	22%
5.73	Be physically healthier	15%	24%	25%	26%	21%	16%
5.68	Do what I want when I want spontaneously	16%	15%	29%	12%	27%	9%
5.66	Feel connected to nature	22%	19%	20%	51%	22%	11%
5.65	Experience things that are new to me	19%	13%	13%	39%	47%	6%
5.58	Feel special or spoilt	12%	30%	24%	34%	42%	12%
5.57	It offers unique holiday experiences	21%	25%	35%	50%	48%	16%
5.56	Soak up the atmosphere	19%	17%	34%	22%	27%	20%

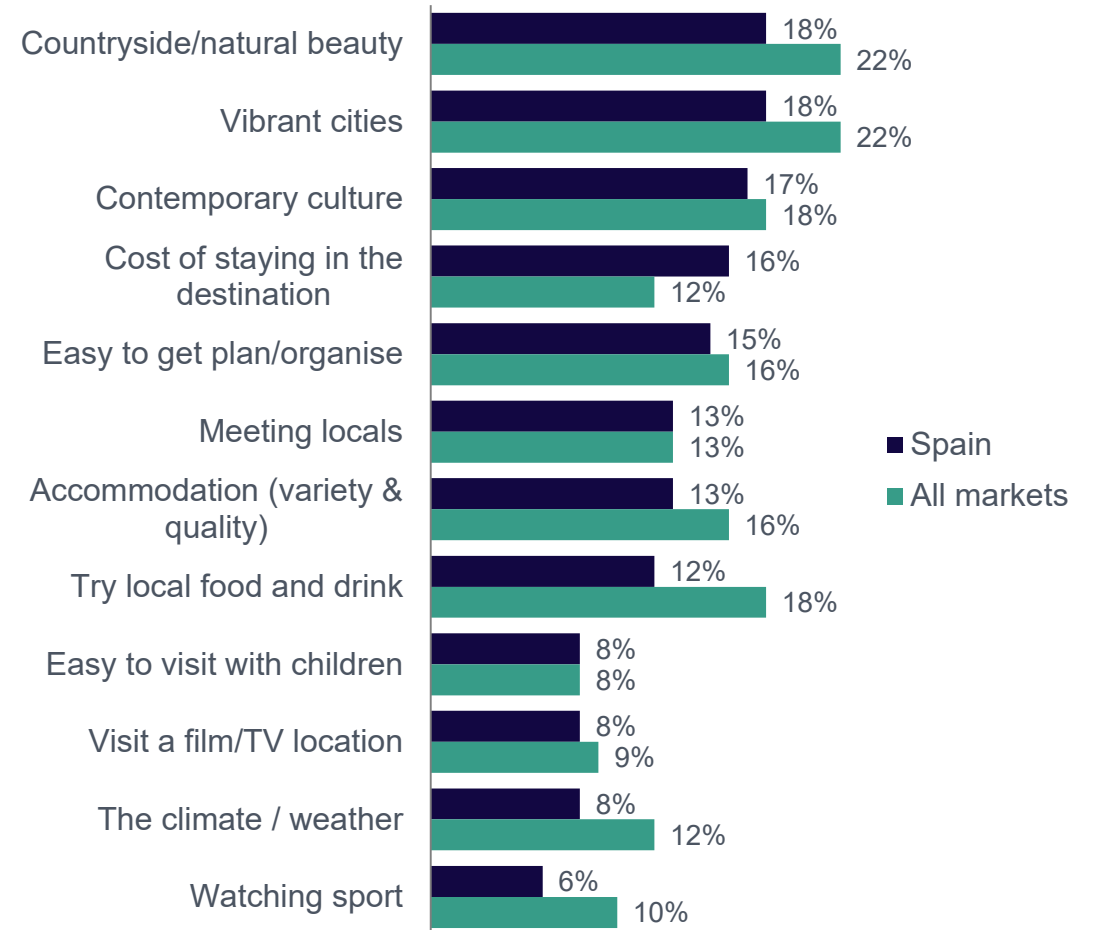
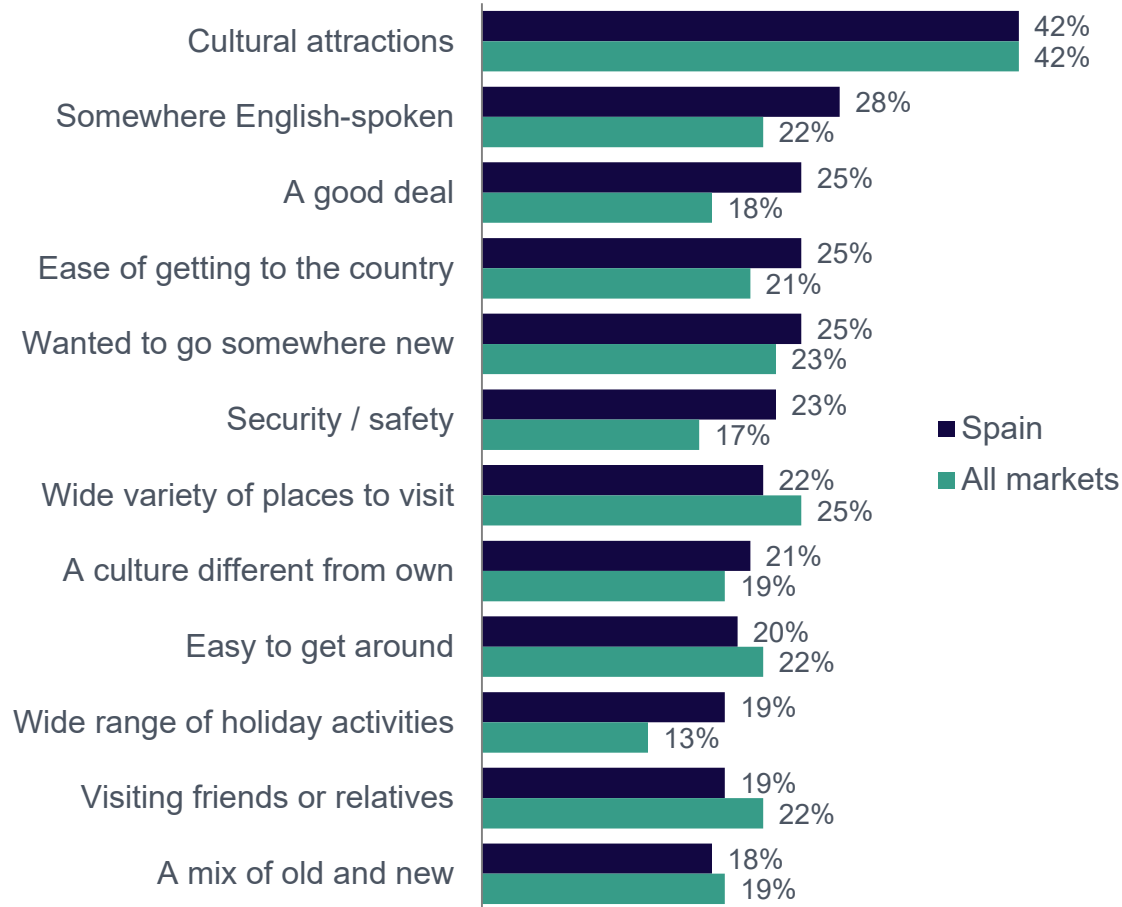
2.3 Perceptions of the UK (5)

Holiday wants and % saying destination is best place for... bottom 20

Importance		GB	FR	IT	AU	US	GE
5.56	A good place to visit at any time of year	19%	31%	42%	26%	34%	17%
5.51	Provides a wide range of holiday experiences	24%	33%	41%	38%	51%	20%
5.49	Enjoy high quality food and drink (gourmet food)	13%	57%	48%	12%	18%	9%
5.45	Chill/ slow down to a different pace of life	11%	22%	26%	17%	18%	7%
5.38	Easy to get around by public transport	35%	35%	30%	13%	32%	33%
5.35	Revisit places of nostalgic importance to me	21%	28%	27%	15%	18%	15%
5.28	Meet the locals	23%	21%	43%	18%	26%	14%
5.04	Visit places important to my family's history	14%	18%	26%	11%	21%	11%
4.93	Do something environmentally sustainable/ green	31%	37%	31%	42%	29%	32%
4.82	Good shopping	42%	24%	32%	8%	68%	14%
4.81	Experience adrenalin filled adventures	15%	9%	9%	47%	54%	18%
4.80	Get some sun	5%	11%	31%	28%	24%	6%
4.76	Party	31%	17%	44%	21%	37%	26%
4.69	Go somewhere that provided lots of laid on entertainment/nightlife	30%	31%	43%	20%	49%	28%
4.67	Meet and have fun with other tourists	17%	31%	36%	24%	31%	23%
4.61	Get off the beaten track	19%	22%	21%	41%	21%	13%
4.59	To participate in an active pastime or sport	14%	19%	17%	27%	41%	22%
4.44	Watch a sporting event	24%	20%	18%	17%	42%	20%
4.32	Do something useful like volunteering to help on a project	18%	15%	21%	30%	23%	15%
3.92	Fashionable destination	23%	24%	30%	26%	50%	18%

2.3 Perceptions of the UK (6)

Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)





VisitBritain



VisitEngland

Understanding the market

Chapter 3

3.1 Structural drivers

- Population of almost 48 million.
- There are 17 autonomous regions in Spain.
- The official language is Spanish and there are several regional languages including Basque, Catalan, and Galician; English is taught as a foreign language in school; however, information for visitors in Spanish should be provided.
- The usual annual leave entitlement is 22 days and there are 14 public holidays per year. Quite a few 'puentes' (bridging days) allow short breaks.
- The Spanish economy is the fourth largest in the EU. The COVID-19 pandemic caused a sharp contraction of GDP by 10.8% in 2020, but the Spanish economy has started recovering from Q2 2021 with it expected to gain momentum later in the year, provided the rollout of the vaccines is successful, resulting in a 6.5% increase of GDP for 2021 overall.

48m

Spanish population
(2019)

3.1 Structural drivers: general market overview

General Market Conditions

- Spain is the UK's fifth largest source market overall in terms of visits, and seventh most valuable in terms of visitor spending in 2019.
- Spain is the fourth-largest economy in the EU. Before the financial crisis which hit in 2008, country had seen 16 consecutive years of economic growth. Particularly boosted by private consumption, economic growth outperformed pre-crisis levels again in 2017 with a fourth-consecutive year of growth by then.
- Spanish GDP had seen growth in 2019, before a sharp contraction of 10.8% in 2020 overall as a result of the COVID-19 pandemic.
- Oxford Economics sees GDP recovering from Q2 2021 after the impact from renewed restrictions having affected Q1 2021, and gaining more momentum later in the year – all depending on a successful vaccine rollout, resulting in a 6.5% increase of GDP for the year overall.

Key demographic and economic data

Measure (2021 data)	Spain	Eurozone
Population (m)	47.6	339.8
GDP per capita PPP (US\$)	35,806	43,324
Annual average GDP growth over past decade (%)	0.6	0.7
GDP growth year-on-year (%)	6.5	4.3

Economic indicators (%)

Indicator	2019	2020	2021	2022
Real GDP growth	2.0%	-10.8%	6.5%	6.1%
Real consumer spending growth	0.9%	-12.1%	6.9%	6.6%
Unemployment rate	14.1%	15.5%	15.5%	15.4%

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	Estimate
Total population (2021)	47.6
Median age (2020)	44 years old
Overall growth rate (2021-2024)	0.3%

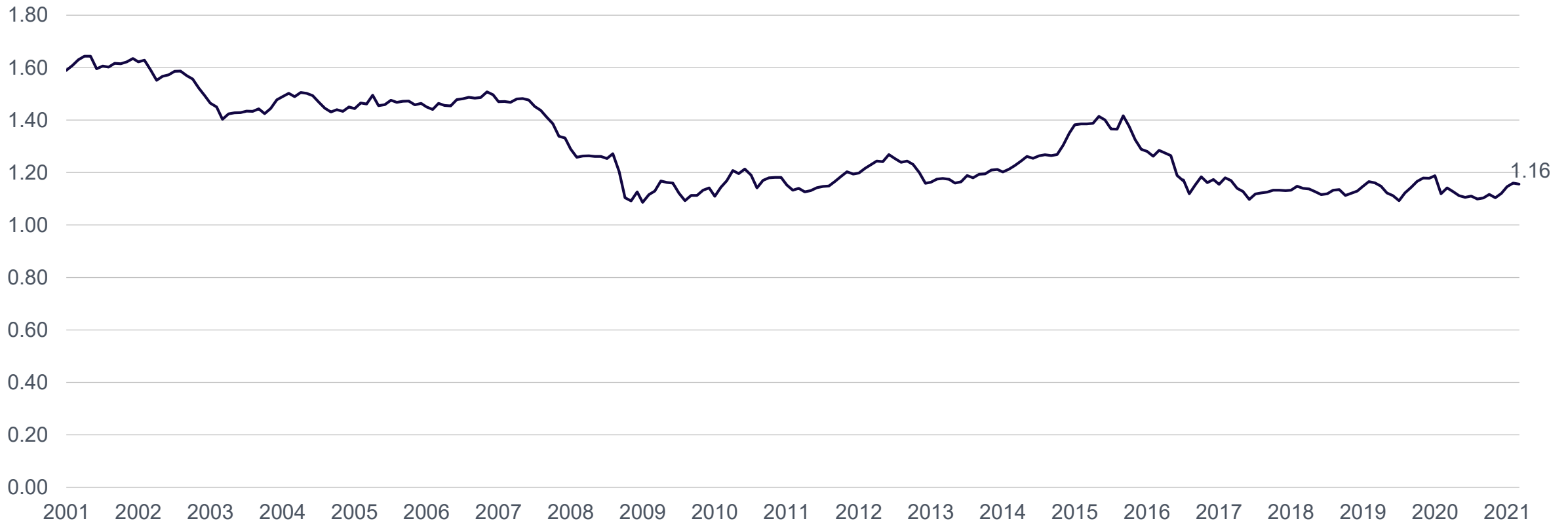
Indicator	1980	2015	2030	2050
Median age (in years)	30.4	42.5	49.6	53.2

- Spain has a population of almost 48 million with a median age of 44 years which is set to rise over the next decades, just like in many ageing societies in Western Europe.
- 81% of the Spanish live in cities (World Bank est. 2019).
- The official language is Spanish and there are several regional languages including Basque, Catalan, and Galician.
- English is taught as a foreign language in school; however, information for visitors in Spanish should be provided.
- The usual annual leave entitlement is 22 days and there are 14 public holidays per year. Quite a few ‘puentes’ (bridging days) allow for short breaks.
- According to the Capgemini World Wealth Report 2020 there were 235,000 High Net Worth Individuals (HNWI)* resident in Spain in 2019, representing an increase of 5% on 2018. This represents Europe’s seventh-largest and the fourteenth-largest HNWI population globally.



3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in EUR)



Please find the most up-to-date exchange rate trend based on monthly averages [on our website](#).

3.2 Consumer trends

- In 2019, the Spanish took almost 194 million trips (almost on par with 2018) and spent more than €48 billion (up 2% on 2018) according to INE. Only 10% of these trips had a destination abroad but spent on holidays outside of Spain represented a third of total visitor spend. In 2020, the Spanish took just under 102 million trips overall, a decrease of 48% on 2019 due to the pandemic.
- 91% of the Spanish population use the Internet in 2021 (slightly up on 2020). The number of mobile connections in Spain also increased slightly comparing January 2020 and January 2021 with 94% of Spaniards using the Internet via mobile devices. 80% of the total Spanish population use social media (37.4m)
- E-commerce penetration keeps growing. 93% of the Spanish population has visited an online retail or store. Travel, mobility and accommodation generated total spend of €12.6 billion (however, down 52% year-on-year due to the pandemic).
- M-commerce in Spain: 42% purchased a product online via a mobile phone.
- VisitBritain's international recovery sentiment tracking shows 77% of the Spanish consider taking an international leisure trip in 2021, which illustrates strong desire to travel. Vaccination, money-back guarantees and hygiene & safety protocols are key facilitators for the Spanish to consider a leisure trip abroad. Many were still undecided about the destination of their next leisure trip in spring 2021.

8 million more
active social
media users in
2021 vs. 2020

3.2 Consumer trends: overall travel trends (1/2)

Travel trends

- The Spanish took a total of 193.9 million trips in 2019 (-1% on 2018) accounting for 794 million nights away from home (almost on par with 2018). The overall amount spent on trips by the resident population of Spain increased by 2% to €48 billion in the same year.
- Almost nine in ten of these trips were domestic, with destinations such as Andalusia, Catalonia and Valencia most popular, while only 10% of Spanish travellers went abroad.
- Of all Spanish overnight trips 18% head abroad and these overnight trips abroad account for a third of all Spanish travel spend, with an average spend of €111 per day and €798 per trip to a foreign country.
- When heading abroad in 2019, the Spanish tended to spend the highest share of their budget on transport (29%), followed by accommodation (21%) and tourist packages (17%).
- In 2020, due to the pandemic, the total number of trips taken by the Spaniards was 101.5 million, a decrease of 48% and their spend on such trips amounted to €21 billion (down 56% on 2019).
- Trips by Spaniards to international destinations suffered the strongest decline by 75% on 2019, only making up 5% of overall trips in 2020.
- According to Trakvelling when asked about travel in the next few months, more than two thirds of Spanish (66%) consider that they are not affected by the health crisis and feel the same desire to travel as always. 14% have a higher desire to travel.
- The pandemic has increased interest among the Spanish in domestic destinations even further. The most frequently mentioned destinations abroad include Portugal, Greece and Italy.
- According to Avis, beach destinations continue to be Spaniards' favourite holiday destinations (37%). They are followed by rural or nature destinations (17%) with almost the same share are of interest in international destinations (17%), while just over one in ten plan to take a road trip in Spain (13%) almost as many travelling to neighbouring countries such as Portugal, France or Andorra (9%) or returning to their home town for a visit (7%).
- Research into consumer travel trends by Amadeus found, that the travel trends post pandemic include: going big on trips, nomadic travel, expecting to have a better service for all ensuring health and safety, technology endorsement and contactless will inspire travellers' trust and confidence. Security is paramount to travel with more confidence. The Spanish are now very conscious on minimising the travel footprint.



3.2 Consumer trends: impact of COVID-19

The impact of COVID-19 on Spanish travel behaviour

- 2020 saw an estimated 72% year-on-year decline in volume and 71% decline in value of visitation from Spain to the UK as a result of the COVID-19 pandemic.
- The second wave of VisitBritain's international recovery sentiment tracking research reveals: 77% of the Spanish considered taking an international leisure trip in the next 12 months (fieldwork 24th March – 5 April 2021), showing a strong desire to travel. Of them, 77% are considering Europe and 14% Britain.
- Britain ranks 4th for consideration of the Spanish hoping to go on a European leisure trip, behind France, Italy, Germany and ahead of Portugal, Greece, Belgium, Croatia, Netherlands and Norway.
- As of spring 2021, 84% of the Spanish indicate that they are happy to take pre-trip tests if required, 73% state that they will favour a local destination within Spain instead of travelling internationally, closely followed by looking for less crowded places to visit, even if it means “missing” must-see attractions. Almost seven-in-ten state that they will think more about sustainability and the environmental impact when planning future holidays.
- Almost a quarter of Spanish had not given much thought to planning their next leisure trip abroad and more than a third had started thinking about it but not yet decided where to go, showing a considerable opportunity to influence destination choice.

Key activators for an international leisure trip	Spain	All markets
Receiving a COVID-19 vaccination	41%	43%
Money-back guarantee should they wish to cancel their trip	40%	34%
Hygiene & safety protocols in place at destination	37%	27%
A significant decrease in coronavirus cases at destination	36%	35%
Removal of quarantine policies in destination country	34%	32%
Removal of quarantine policies in home country	28%	28%

Source: Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves; [latest results can be found on our website](#)



3.2 Consumer trends: overall travel trends (2/2)

Motivation and attitudes to holidays

- Expedia Groups' latest travel report confirms that the availability of COVID-19 vaccination is helping people feel confident about booking trips again. The Spanish are eager to get out and see their loved ones and travel the world again.
- A strong preference for domestic travel is expected to continue in the Spanish market.
- More than half of Spanish respondents stated a city destination as their preferred destination for the next leisure trip followed by a almost a third who would seek out small/mid-sized cities/towns.
- International travel highly depends on pandemic regulations and travellers will spend more time planning their perfect trip. Vacation rentals have seen a boom, as has remote working vacations. Local travel expertise and information is in demand with the desire for travel stronger than ever.
- Destination choice is now based on COVID-19 health & safety and reassurance, flexible offers and good prices, outdoors and nature, connectivity (non-stop flights preferred), reputation and sustainability. It is considered relevant that the destination is inclusive and diverse, or that it has a range of tourist services that offset emissions, as well as taking sustainability criteria into account.
- The value for money factor, opportunities to interact with locals and access to quality medical services are other important factors in the choice of destination.
- Insurance, road trips and itineraries, packages and the role of travel agencies gain prominence in the wake of the pandemic.
- The profile of the Spanish traveller with the highest propensity to travel within 2021: with a partner, followed by Millennials, families and digital nomads; with most stating being vaccinated as a key condition.
- Pinterest defines the new types of travellers following the pandemic as: digital nomads, culture chasers, bucket listers, foodie travelers, week-enders, outdoors and nature addicts, rural tourists, and memory makers.

Sources: Pinterest, Expedia Group, European Traveller Intelligence Monitor from Interface Tourism, Blueroom study Perception on Safe Destinations, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves; [latest results can be found on our website](#)



3.3 Booking and planning

- In a normal year, a large proportion of Spanish holiday visitors tend to start thinking about their trip early with 40% doing this as early as half a year or more in advance.
- 30% of bookings were made in the three to six month window before the arrival to Britain; however, more than 60% of Spanish bookings happened within two months before the trip. Triggered by the COVID-19 pandemic, booking windows became very short recently.
- Most bookings to Britain were made online; however, when travel and accommodation are booked together, more than one in three visitors made the booking face-to-face. Almost three-in-five Spanish currently see bookings with a travel agent as the safest option to mitigate risk during the uncertainty around travel during the pandemic.
- There is a higher tendency among Spanish visitors to purchase tickets e.g. for the performing arts, guided tours, and tickets to attractions during their stay in Britain; however, sporting events are more likely to be bought in advance of a trip to Britain.

>60%
of Spanish visitors
booked within two
months of their
arrival in Britain

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	Spain	All markets
Online	93%	85%
Face-to-face	4%	10%
By phone	2%	4%
Don't know	1%	1%

- Spanish visitors have become increasingly comfortable with booking their trips to Britain online.
- One in three bookings were made face to face when they booked a holiday arrangement (i.e. travel and accommodation combined). This compares to the global average of 26%.

How trips to Britain were booked: accommodation only

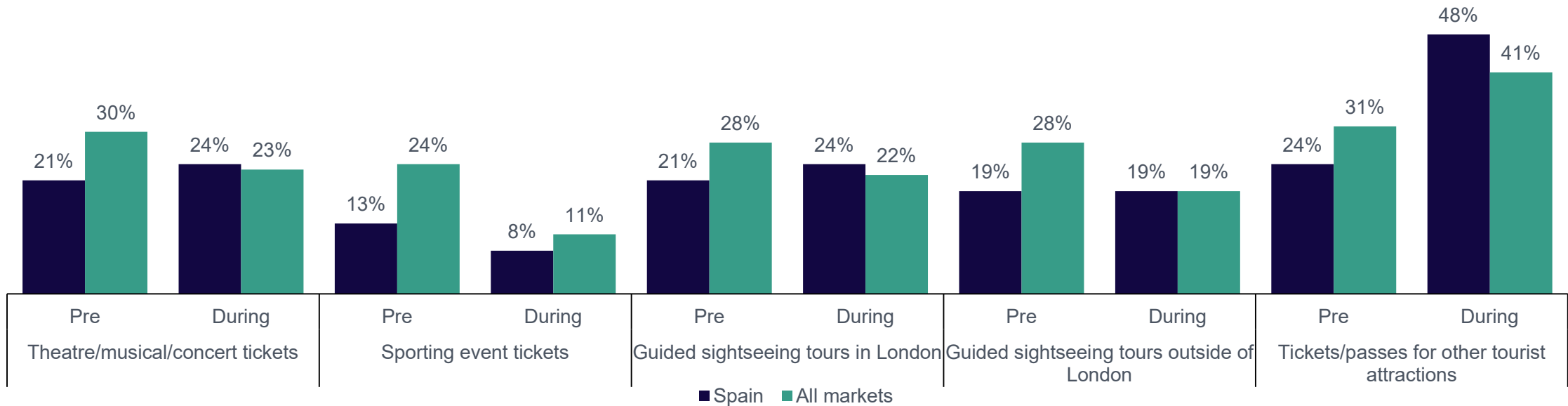
Booking method	Spain	All markets
Online	75%	70%
Face-to-face	7%	6%
By phone	1%	3%
Did not book/stayed with friends/relatives	15%	18%
Don't know	1%	2%

How trips to Britain were booked: travel + accommodation

Booking method	Spain	All markets
Online	66%	64%
Face-to-face	33%	26%
By Phone	1%	9%
Don't know	0%	1%

3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip



- Prior to trip: The proportion of purchases of all the above items before the trip was below the all market average across all categories amongst Spanish respondents.
- During the trip: Nearly one in four purchased theatre/musical/concert tickets or guided sightseeing tours in London. Nearly half of Spanish visitors bought tickets/passes for miscellaneous tourist attractions.

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Spain	All markets
6+ months	40%	49%
3-6 months	34%	31%
1-2 months	18%	13%
Less than 1 month	7%	5%
Don't know	1%	3%

Looking at options/prices

Lead time	Spain	All markets
6+ months	14%	21%
3-6 months	43%	37%
1-2 months	29%	27%
Less than 1 month	12%	12%
Don't know	2%	4%

Deciding on the destination

Lead time	Spain	All markets
6+ months	24%	32%
3-6 months	44%	38%
1-2 months	22%	19%
Less than 1 month	9%	7%
Don't know	1%	3%

Booking the trip

Lead time	Spain	All markets
6+ months	7%	14%
3-6 months	30%	32%
1-2 months	44%	28%
Less than 1 month	17%	21%
Don't know	2%	5%

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain

- Two in five Spanish tended to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; 34% did this three to six months in advance.
- Roughly one in four decided to travel to Britain either six months or earlier and 68% knew at least three months prior to the actual journey.
- More than two in five Spanish visitors looked at options and prices between three and six months ahead of the trip and 30% also made the booking in the same time frame. 29% were more spontaneous and looked at options between one and two months before the trip and 12% within one month. 17% booked their trip to Britain in the month leading up to the departure. This highlights a tendency to book later than many other markets.
- The majority of Spanish visitors who booked travel and accommodation separately booked it directly with the service provider e.g. airline (66% and 49% respectively). 48% of those who booked accommodation separately used a travel agent/tour operator or travel comparison website. When they bought travel and accommodation together as a package 67% chose to book it through a travel agent, tour operator or travel comparison website.

>60%
of the Spanish booked
within two months of
arrival in Britain even
prior to the COVID-19
pandemic.

3.4 Reaching the consumer

- The most influential source for destination choice for the Spanish who have visited Britain or are considering a visit are friends, relatives and colleagues followed by travel blogs and travel guidebooks.
- These are closely followed by websites providing reviews and information on search engines.
- Lockdown produced an increase of time spent on the Internet, up 25% on pre-COVID levels reaching an average of 169 minutes per day.
- Spaniards consumed more media and entertainment than ever with an increase of 26% during the state of emergency. This increase was driven primarily by VOD platforms, especially Netflix, HBO and Amazon Prime. Disney +, launched in Spain in March 2020 reaching a record 100 million subscribers globally in just 16 months.
- 2020 has also been the year of the “audio” in Spain with especially podcasts trending: three in four Internet users are aware of the podcast format and almost half of them (47%) consume podcasts (up 6% on 2019). The main platforms used include Spotify (48% of users listening to podcasts), Ivoox (26%), and YouTube (5%).
- Facebook and Instagram are the preferred social media networks for Spaniards. The membership of Facebook is stable at 22 million of users; Instagram continues to see growth reaching 20 million of users in 2020 (up 25% on 2019).

Friends, family &
colleagues

#1 Influence for the
destination choice
of the Spanish

3.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media



- TV maintains the leadership as the media with the highest penetration in Spain at 86%, and an average of 213 minutes per day. 2 hours of every 3 are spent on watching traditional TV with Telecinco being the leading tv channel.
- The biggest TV Groups are Mediaset (43% of GRP's), Atresmedia (37% of GRP's)
- Spaniards spend more hours on watching TV during the week than in the weekend. The slot with the biggest audience is between 8:00 pm and 4:00 am
- Netflix (64% of market penetration) and Amazon Prime (32%) are the leaders on VOD platforms, followed by the Spanish Movistar + (12%), HBO (11%) and Disney+ (10%) Netflix registered record growth in the first six months of 2020 reaching 26 million new subscriptions compared to 12 millions recorded in the first half of 2019.
- VOD platforms make up approximately one third of general content consumption currently; their share is forecast to increase to 80% by 2030

Radio



- The radio audience in Spain represents 57% of the population.
- Radio consumption has experienced a progressive, albeit not always linear, increase since the 1980s. While in 1986 its audience represented little more than 55% of the population, it reached almost 62% in 2012. Since then, however, it has been declining.
- 2020 has been one of the worst years for radio channels with average radio consumption decreasing to 93.5 minutes in 2020.
- The morning is the favourite slot for Spanish listeners and thematic radio is still the most popular, more than the general radio content.
- Online radio increases its audience reaching 6% in 2020 (up 1% on 2019).
- In 2020, 60% of Internet users listen to online audio content (up 3% on 2019) which includes radio, music and also audiobooks but podcast is the format which saw the biggest increase reaching 19% of penetration of the Internet audience (up 9% on the previous year).

Newspapers



- 2020 saw the sales of print editions plummet and some have had to stop activity spent on supplements like El Mundo with Yo Dona, Metropoli and Fuera de Serie
- The 4 main newspapers have launched paywall sites since: El Mundo, El País, La Vanguardia and ABC
- Print media penetration dropped to a historic minimum in 2020 to just 18% which represents a loss of 1.3 million readers in only 12 months.

3.4 Reaching the consumer: magazines and online media

Newspapers (continued)

- This decrease is countered by an increase for online versions which reached a 85% market penetration of the Spanish population (up 1% on the previous year).
- The daily average time of consumption for print media is around 7 minutes compared to the total of time for all media consummation which is 8 hours. Internet takes up three hours of this time per day.
- This general decrease in print media consumption has been accompanied by a strong drop in advertising investment: newspapers have lost almost a third of their advertising incomes during the first nine months of 2020.

Magazines

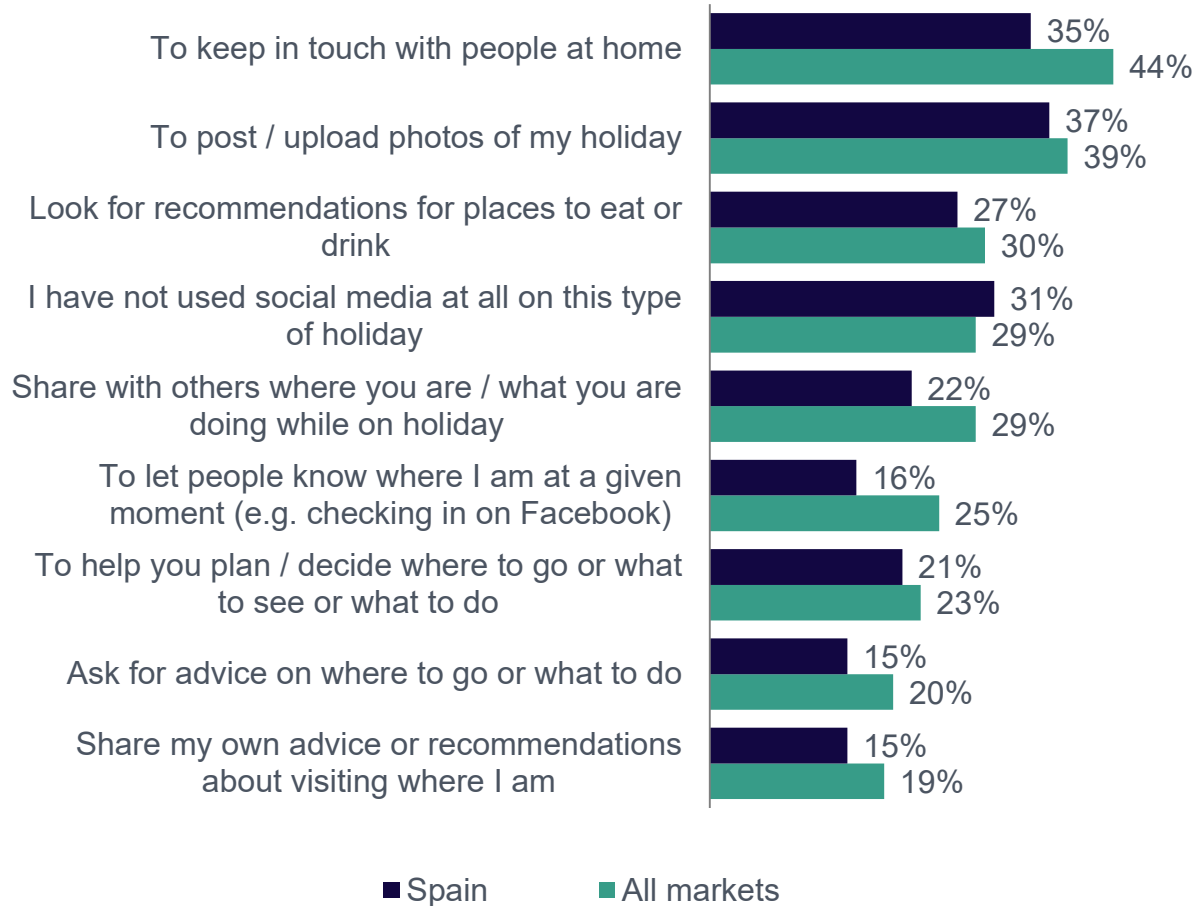
- Magazines' market penetration has gone from 29% in 2019 to 26% in 2020, and there has been a general drop of print editions' readers across all categories.
- Top 3 Spanish monthly magazines: National Geographic (1.5m), Muy Interesante (1.2 m), Vogue (700k).
- Top 3 Spanish lifestyle magazines: Vogue (700k), Cosmopolitan (480k), Elle (478k)
- Top 3 Spanish travel magazines: Viajes National Geographic (557k), Viajar (200k), De Viajes (81k)
- Hola.com (1.4 m UU) and Telva.com (183K UU) are the only online magazines which are included in the TOP25 online sites visited in Spain

Online media

- Internet user market penetration keeps growing and now reaches 85% of the Spanish population
- Top 10 online sites for Spaniards: YouTube, Facebook, Spotify, El País, Marca, La Vanguardia, Loteriasyapuestas.es, Rtve.es, As, La Razon
- For first time ever, 50% of advertising investment was put on digital media
- The audience of digital media grows every year, probably driven by increases in the audience using the mobile format which is leading the ranking with 32 million unique users. The only format which saw declines is desktop with a total audience of 22 million unique users (down 1% on the previous year).
- The trending categories during the past year have been: Social media, entertainment and services; entertainment has been the only category with increases (up 5% on 2019)
- In summary, the picture was most stable among online media during the pandemic in 2020.

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday



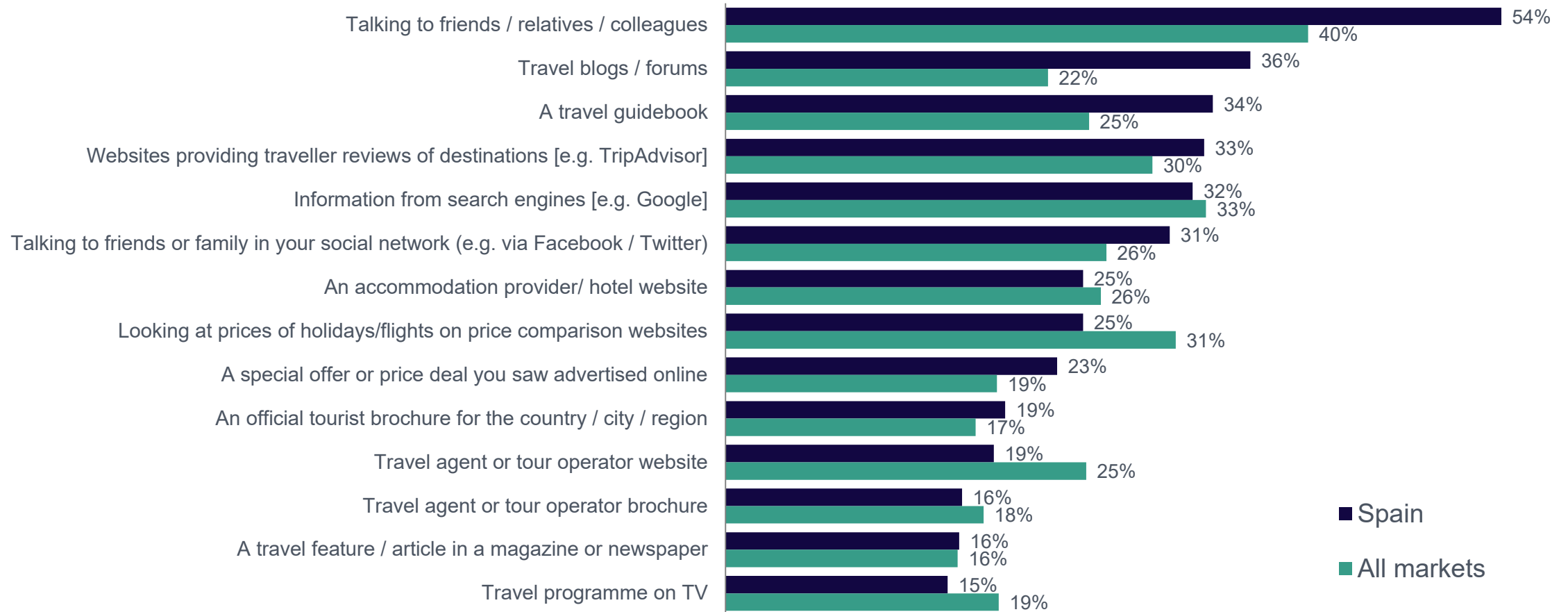
- The Spanish are heavy users of social media and digitally savvy in general. There were 37.4 million active social media users in Spain in January 2021 (80% of the total population). The number of social media users increased by 8.1 million, i.e. 28%, between 2020 and 2021.
- Many use social media on holiday to post their holiday photos or to keep in touch with people at home.
- 72% of Spanish like to stay connected whilst they are on holiday and 75% regard a smartphone as essential whilst they are on holiday.
- 83% of Spanish love to take photos when they are on holiday which is above average compared to all other markets and only topped by Germans and Italian respondents when compared to other European markets.
- 66% of Spanish have shared holiday photos online and 17% would like to do so and 2 in 5 have shared holiday video content and 1 in 4 would like to do so. More Spanish than the average from other markets have already used location technology to find places to visit (62%) and a further 30% are interested in using it. Trust in reviews on social media from other tourists is high (62%) compared to other Europeans.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?; [We are Social Hootsuite Digital 2021 Spain](#)



3.4 Reaching the consumer: influences (top 14)

Influences on destination choice – top 14

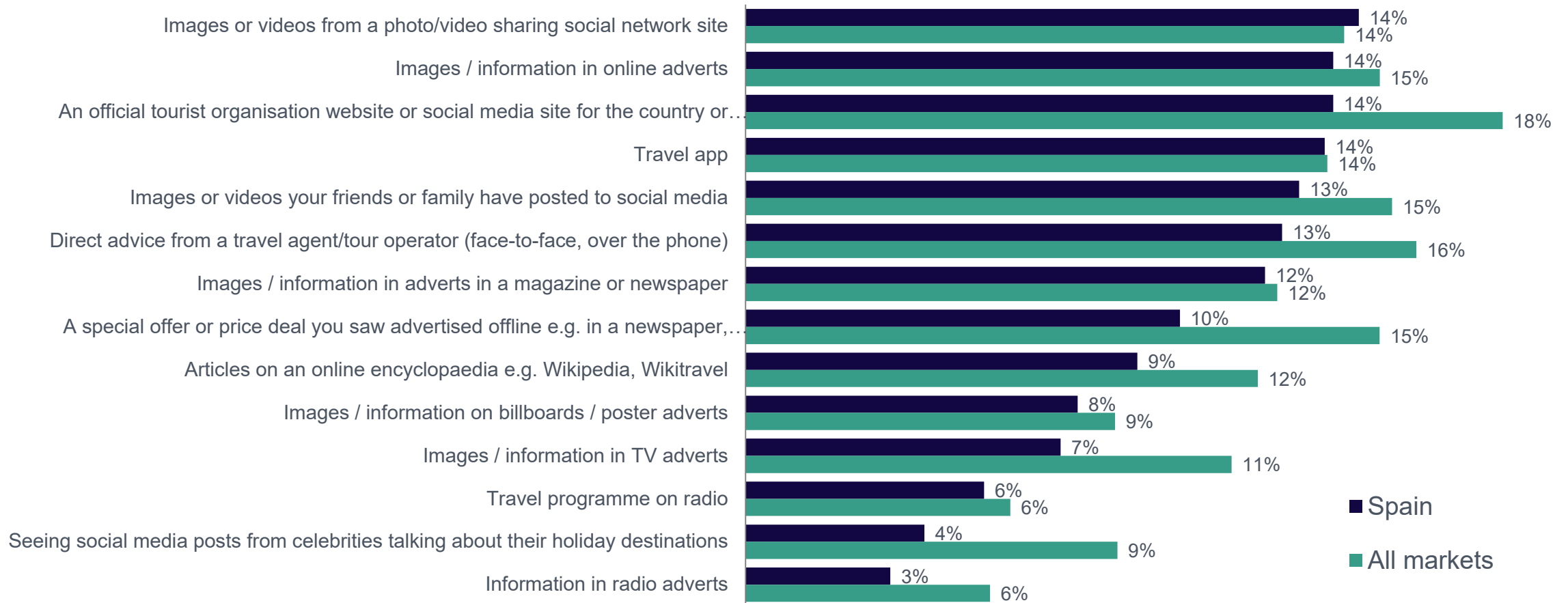


Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)



3.4 Reaching the consumer: influences (bottom 14)

Influences on destination choice – bottom 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)





VisitBritain



VisitEngland

Access and travel trade

Chapter 4

4.1 Access: key facts

- Most Spanish travel to the United Kingdom by plane. It is a short non-stop flight: usually about 2-2.5 hrs flight time. A few (5%) come to the UK by other means of transport i.e. by ferry crossings or through the Channel Tunnel.
- Annual seat capacity on non-stop flights grew to 24.6 million in 2019, before the pandemic brought a steep decline of 66% to just 8.3 million seats in 2020. The impact of the crisis was most strongly felt since April 2020.
- Many airlines operate flights in the Spain to UK corridor with the low cost carriers Ryanair and easyJet operating more than half of annual seat capacity between the two countries.
- Spanish visitors departing Britain by air pay £13 in Air Passenger Duty.
- The good regional spread of Spanish visitors is supported by the connectivity to many regional airports in the United Kingdom.
- The small annual share of some regional airports can be due to seasonal connectivity e.g. only included in the summer schedule.

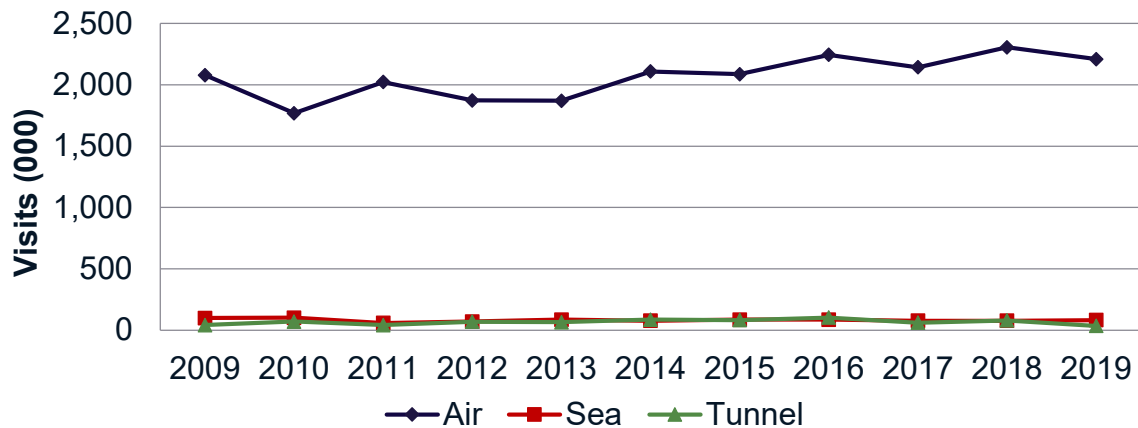
Almost all of visits from Spain to the UK are made by plane.

Access to Britain

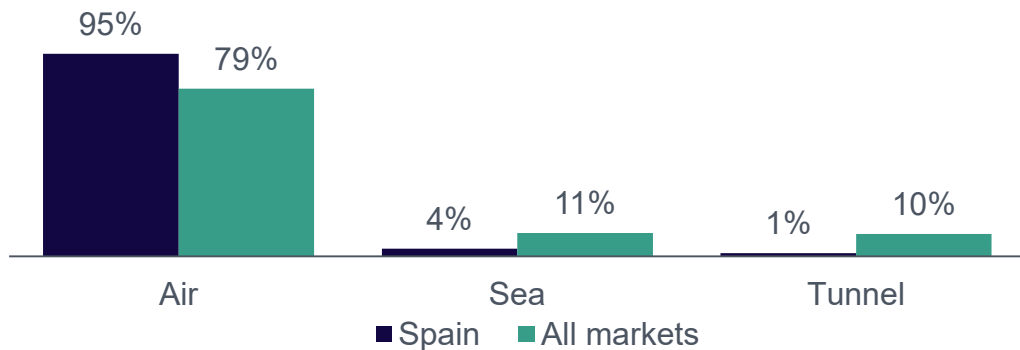
Measure	2019
Weekly aircraft departures	2,558
Weekly seat capacity	472,866
Airports with direct routes in Spain	30
Airports with direct routes in Britain	28
Weekly ferry crossings	7

4.1 Access: mode of transport

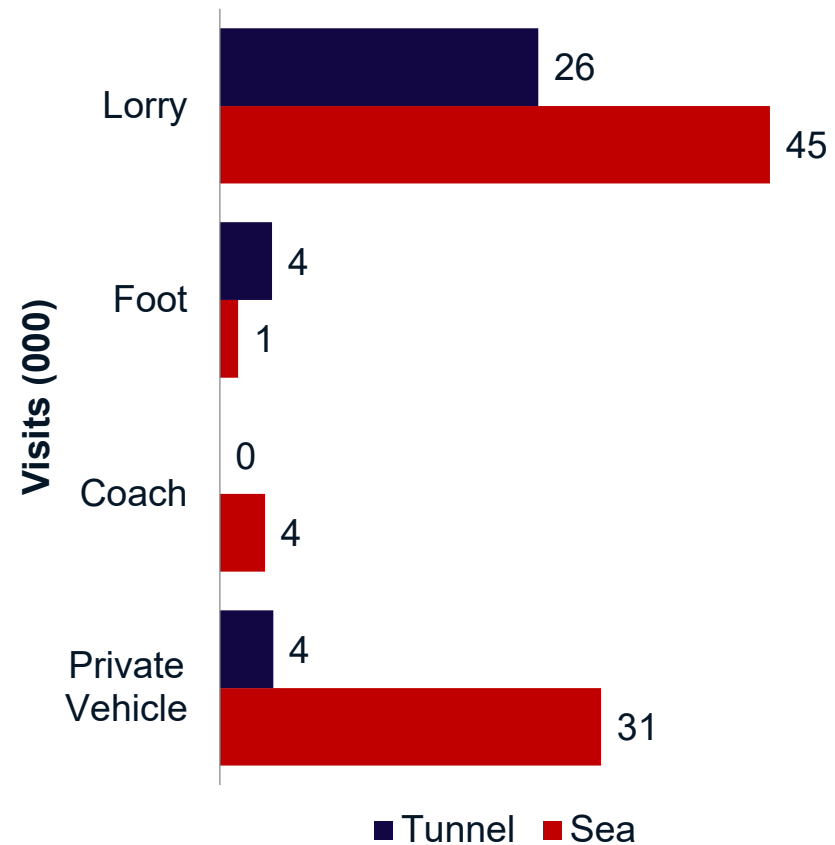
Visits by mode of transport



Annual share by mode (2019)



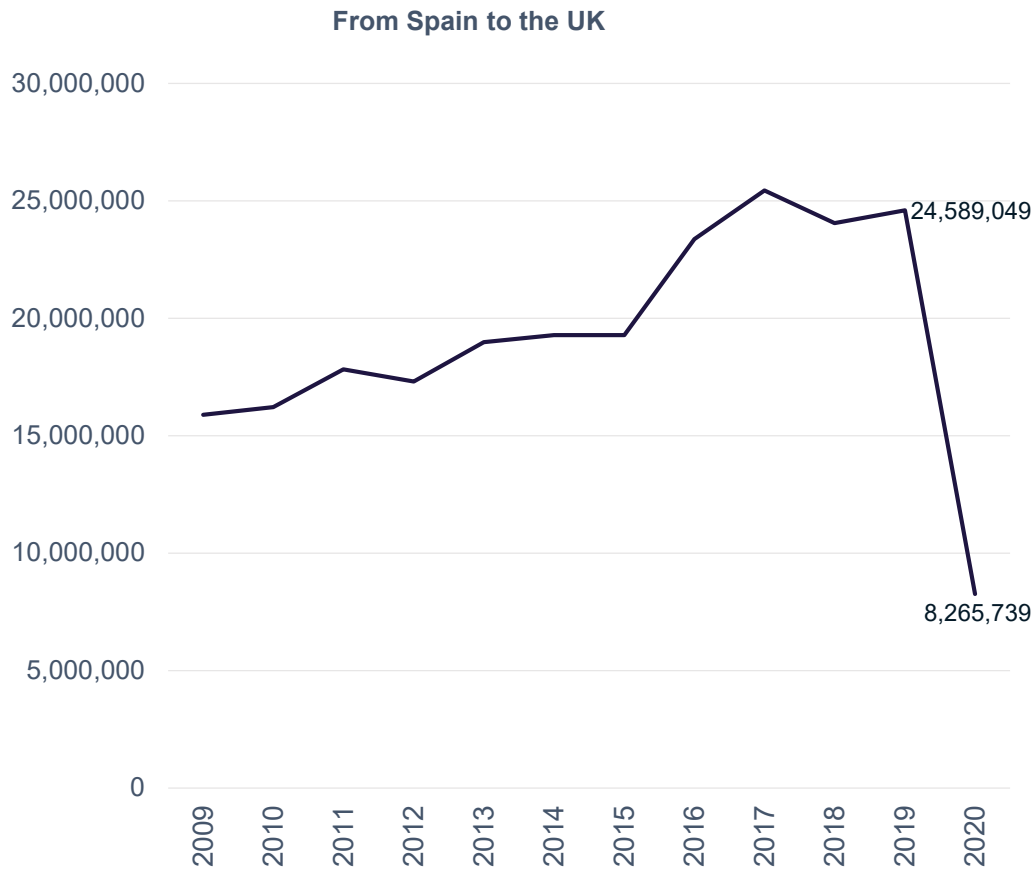
Sea and tunnel travel (000s) in 2019



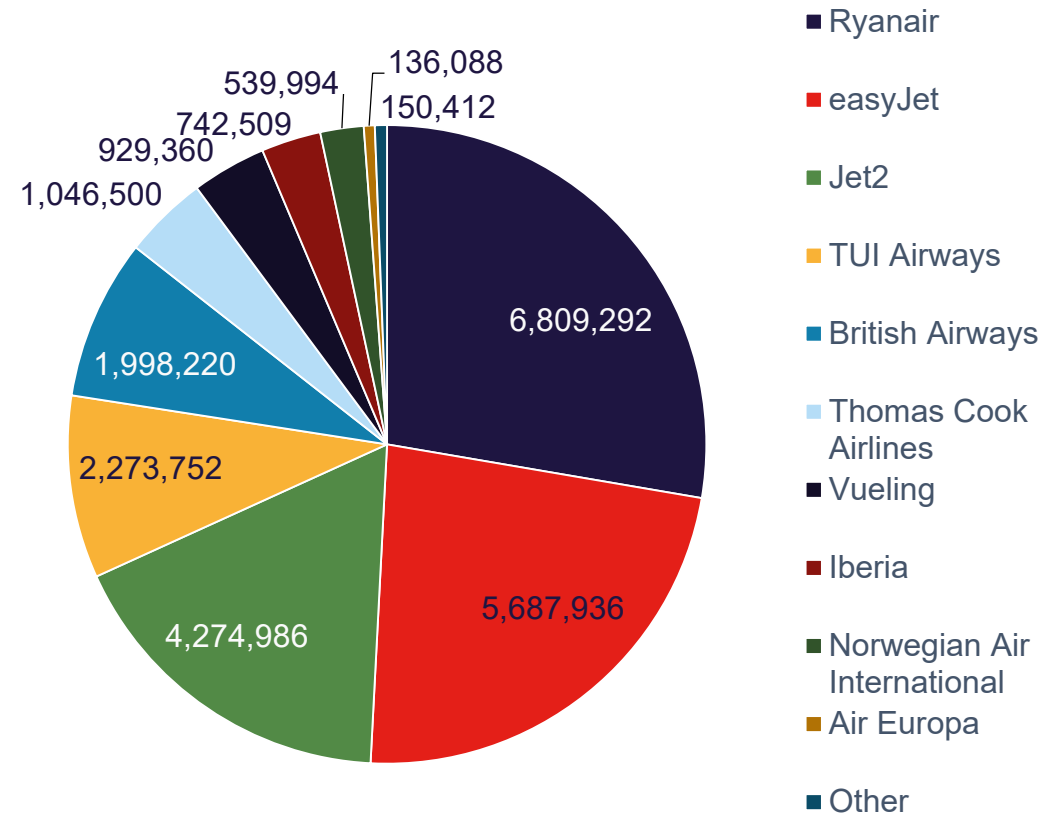
Source: International Passenger Survey by ONS

4.1 Access: capacity (1)

Annual airline seat capacity trends



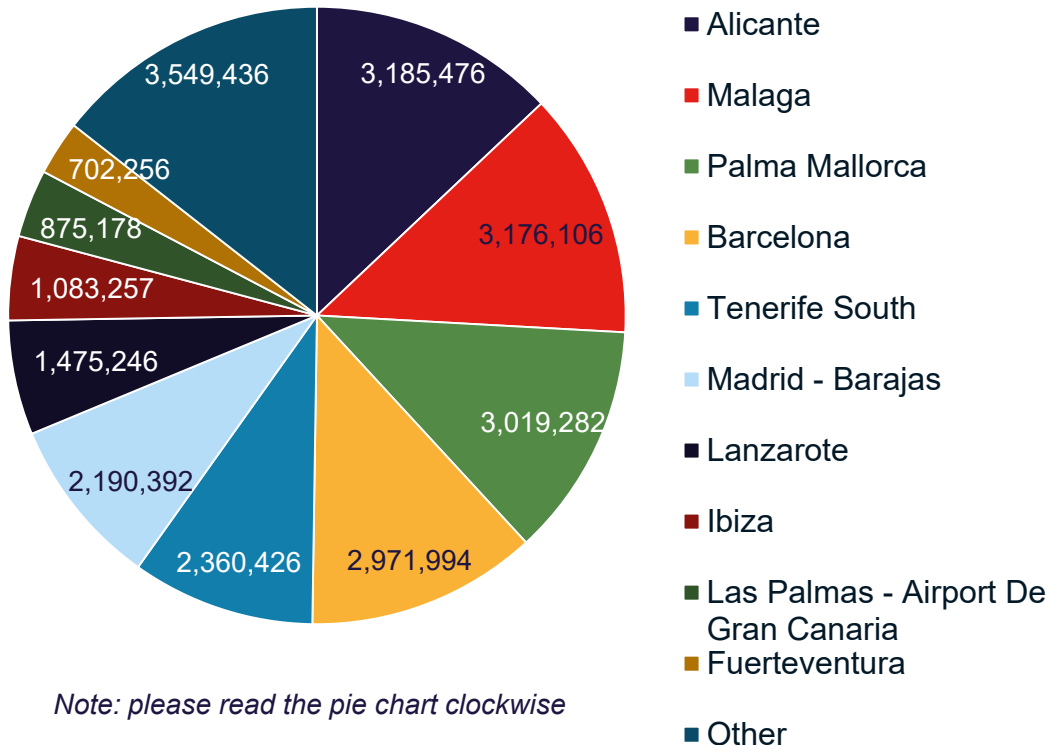
Airline seat capacity by carrier (2019)



Source: Apex, non-stop flights only. Other groups: Flybe (ceased trading in spring 2020), Aer Lingus, Wizz Air UK, Blue Air, XL Airways France, and Germania

4.1 Access: capacity (2)

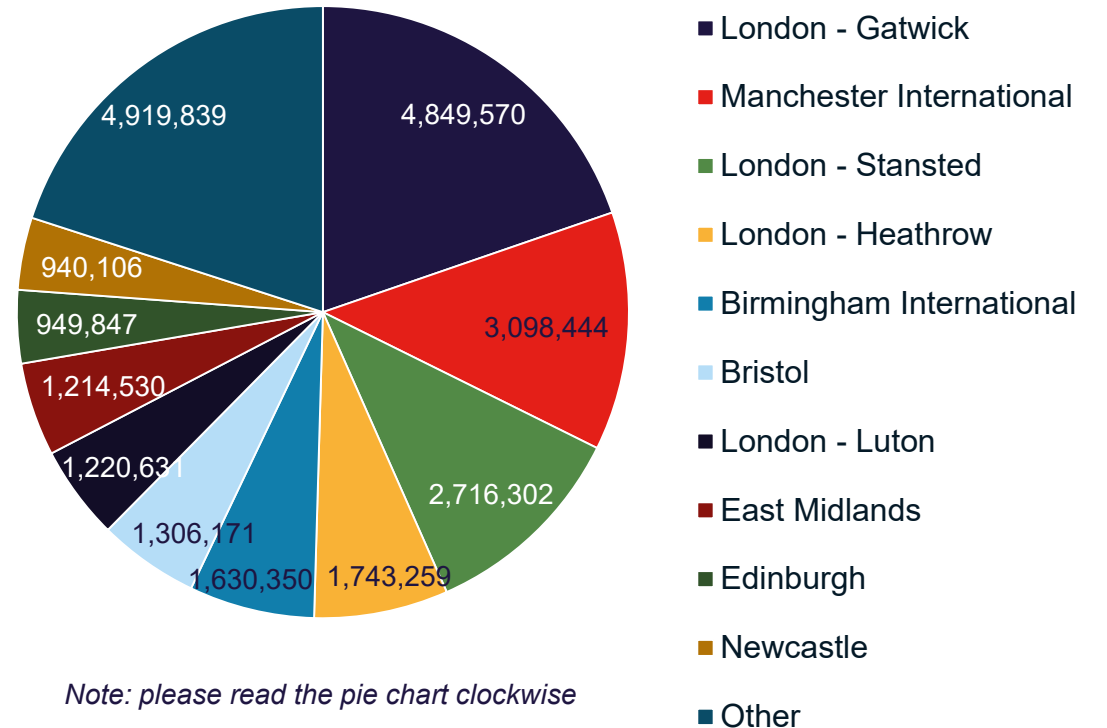
Origin airport annual seat capacity (2019)



Note: please read the pie chart clockwise

Other in origin airports groups: Menorca, Region de Murcia International, Valencia, Sevilla - San Pablo, Reus, Gerona - Costa Brava, Bilbao, Almeria, Santiago De Compostela, Santander, La Coruña, Jerez, Zaragoza, Granada, Santa Cruz de la Palma - La Palma, Castellon de la Plana, Asturias, Murcia - San Javier, Lleida - Alguaire, Vigo

Destination airport seat capacity (2019)



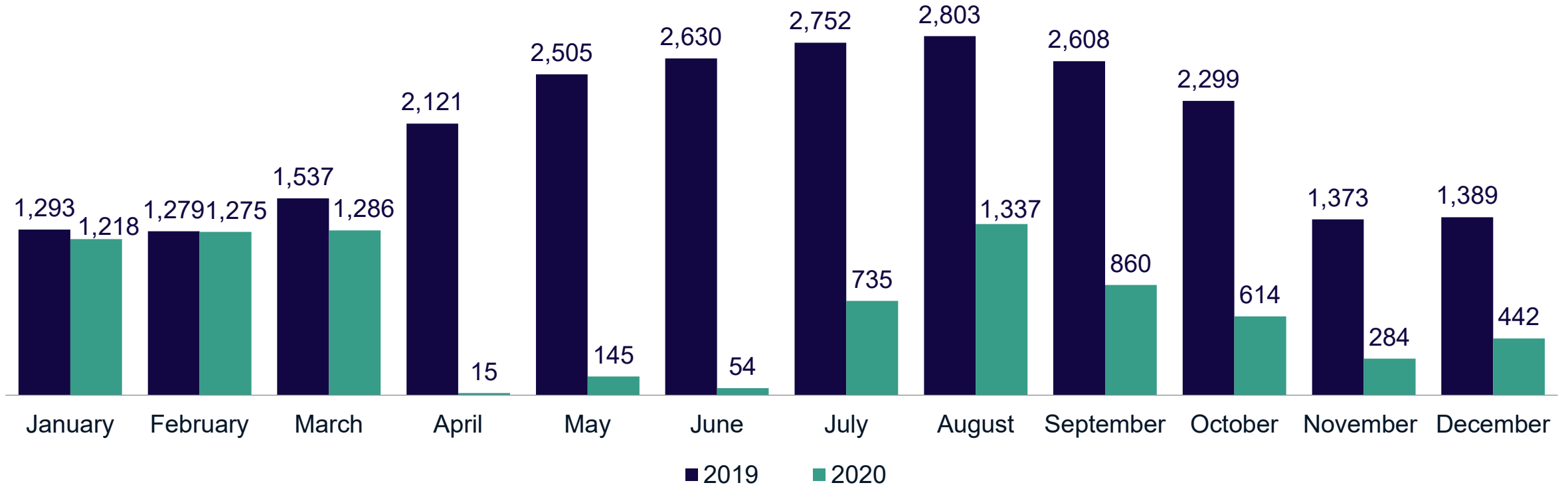
Note: please read the pie chart clockwise

Other in destination airports groups: Leeds/Bradford, Glasgow International, Liverpool John Lennon, Belfast International, London Southend, Cardiff, Glasgow Prestwick, Bournemouth International, Doncaster Sheffield, Exeter International, London City, Aberdeen, Norwich, Southampton, Belfast City, Cornwall Airport Newquay, Humberside, Jersey.

4.1 Access: impact of the COVID-19 pandemic

Impact of the COVID-19 pandemic on connectivity

Monthly seat capacity on flights from Spain to the UK (000s)



- Seat capacity on non-stop flights between Spain and the UK declined by 66% in 2020 compared to 2019 as a result of the COVID-19 pandemic. The impact was felt most since April 2020. Whilst seat capacity showed some improvement in the summer months, the end of 2020 was strongly affected by the pandemic again.
- The effect of the pandemic was also felt severely in Channel Tunnel and sea connectivity.

Source: Apex, non-stop flights only.

4.2 Travel trade: general overview (1)

- Structure: Mayoristas (Tour Operators), Mayoristas-Minoristas (Tour Operators/retailers) and Minoristas (retail Travel Agencies).
- In 2020, there were around 9,700 travel agencies and tour operators in Spain. Almost 20% are located in Madrid, followed by 17% in Catalonia and 17% in Andalusia.
- Generally tour operators use ground handlers in UK.
- Personal relationships are very important to the Spanish and take time to build.
- Tour operators work very closely with their circle of travel agencies.
- Planning cycle: Jan-Apr (start programming the summer brochure and sell Easter), May-Sep (after Easter, summer brochures distributed to outlets and start planning winter brochures), Oct-Dec: winter brochures distributed to outlets.
- 67% of bookings which combined accommodation and travel were made through a travel agent/tour operator or travel comparison website.

Please note that the information provided in this section reflects the situation prior to the COVID-19 pandemic as fundamental market changes are still in progress and comprehensive data are yet to emerge.

4.2 Travel trade: Spanish tour operators

Top ten operators in Spain in 2018

Top Ten Tour Operators	Turnover €m
Tourmundial	300
Special Tours	170
Politours	70
Proyecto Europa	Not disclosed
Travelplan	594
Panavision Tours	113
Catai Tours	166
Europamundo	140
Mapatours	160
TUI Spain	80

Top ten travel agencies in Spain in 2019

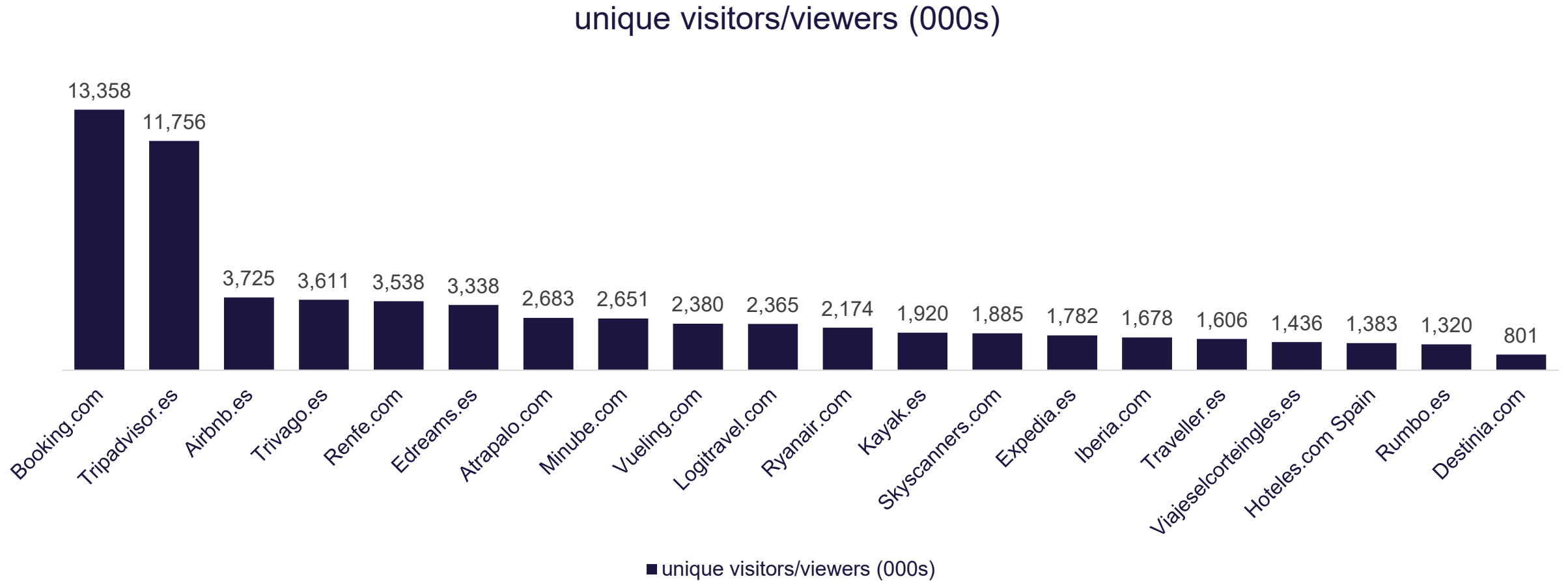
Top Ten Coach Operators	Turnover €m
Viajes El Corte Ingles	2,448
Avoris Retail Division	1,013
Traveltino	525
CWT Global España	375
B the Travel Brand	363
Globalia corporate travel	323
Globalia business travel	296
Vacaciones eDreams	284
Viajes Catai	203
TUI España Turismo	199

Source: ranking by Hostelur 2018



4.2 Travel trade: online travel companies

Top 20 online travel companies by unique visitors/viewers (000s) in 2018



4.2 Travel trade: Spanish holidays

National public holidays:

2021	National public holidays
1 January	New Year's Day
6 January	Epiphany
2 April	Good Friday
1 Mai	Labour Day
15 August	Assumption Day
12 October	National Day
1 November	All Saints' Day
6 December	Day of the Spanish Constitution
8 December	Immaculate Conception Day
25 December	Christmas Day

*Please note that there is also a variety of local holidays in Spain so please check before you travel.

4.2 Travel trade: practical information

General practical information:

- Business hours are usually 09:00 – 19:00 for tour operators, 9:30 – 13:45 and 16:00 – 20:00 for travel agencies from Monday – Friday.
- When introduced expect to shake hands. Once a relationship is established, men may embrace and pat each other on the shoulder. Female friends kiss on both cheeks, starting with the left. Many men use a two-handed shake where the left hand is placed on the right forearm of the other person. People are often referred to as Don or Doña (pronounced Donya) and their first name when in formal occasion as a general rule.
- Check your trip does not coincide with a public holiday as many Spanish take long weekends or holidays around these. Mid-September to early December is the main planning period for summer and all-year programmes. Other good times are: mid-January to two to three weeks before Easter and then two weeks after Easter until June. VisitBritain is happy to provide guidance.
- Be punctual and allow for flexibility around the duration of the meeting.
- Dress code: Business dress tends to be understated and stylish.
- Business Meeting Etiquette: Appointments are mandatory and should be made one to two weeks in advance. Meetings are often for the dissemination of information or the issuing of instructions rather than for open debate. Agendas, when used, will allow for creativity and flexibility. Most Spaniards tend not give their opinion at meetings. Therefore, it is important to watch their non-verbal communication.
- Face-to-face contact is preferred to written or telephone communication. An oral understanding is reached before a binding contract is set up in writing. Physical contact in a conversation is a typical aspect of communication for Spaniards. Keep good eye contact and avoid confrontation if at all possible. Personal relationships are important and internal organisations are driven through these relationships, as are external client contacts. They take time to build but they are the best way to build long-term successful business with the Spanish market. Be sensitive to regional differences in the Spanish market and aware that decision-making is often held at the top of the company.
- Make sure your printed material is available in both English and Spanish and ideally sent in advance.



4.2 Travel trade: sales calls

Sales calls

Spain is a large regionalised country with the travel trade concentrated around Madrid and Barcelona but also in Valencia, Bilbao and Seville, with large distances between them. Therefore, before you embark on what could turn out to be a very costly and time-consuming sales visit to Spain, VisitBritain recommends that you take the following steps:

- Provide the operators you are visiting with a comprehensive information pack (preferably in Spanish) about your product. On your return to Britain ensure that you follow up quickly and renew contact regularly.
 - Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
 - It is also important to note that a significant number of the key Britain players attend the VisitBritain's ExploreGB workshop, Best of Britain, BIM Marketplace and VisitScotland Expo. Please contact VisitBritain London for details of those attending. Some operators also visit World Travel Market but register with the organisers independently.
- Bear in mind that it is not going to happen overnight! Spain is a big, complex and very competitive market that requires hard work and commitment. It may take several years to become established.



4.2 Travel trade: hospitality etiquette

Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your Spanish business partner out for a meal – either to build up a relationship or to thank for business given in the past. Here are some practical tips to help you plan this:

- When choosing a restaurant ensure beforehand that credit cards are accepted or bring enough cash. Visa and Mastercard are most accepted; in some restaurants American Express cards are not accepted.
 - Arrive on time and if possible, before the invite, but allow for a 5-10 minute delay.
 - If you order water you will be served still mineral water or if requested specifically sparkling water. It is uncommon to order tap water.
 - Bread is always served and the Spanish tend to drink wine with their meals.
 - Regularly VAT is not included on the menu prices and will be added to the invoice.
 - Service is not included on the invoice. It is up to your discretion but a tip of 5% will be expected.
- Entertaining at meal times is an important part of the relationship building process. Food is to be savoured. Save discussions about specific business issues for the coffee.



4.3 Caring for the consumer (1/2)

Advice on caring for Spanish consumers

- Spanish look for local flavour, so Bed & Breakfast accommodation is popular, especially outside London. In the absence of B&Bs they would look for boutique budget hotels centrally located.
- Cleanliness is paramount to Spanish visitors. Like most Europeans the Spanish expect en-suite bathrooms. Tiled bathrooms are preferable to carpeted ones. Shower cabins are also preferred to bath tubs in hotels.
- Spanish guests have high expectations and certainly will not hesitate to complain if something is not to their satisfaction. Deal with any situation promptly and courteously. In Spain all establishments have a complaint book (“hoja de reclamaciones”) on the premises and this is advertised to the customer, so they would expect the same in Britain.
- Provide local information and generate interest.
- Spanish visitors are interested in local colour – markets, pubs, interesting excursions and shopping possibilities. Spanish visitors need to feel comfortable in Britain. Highlight the ease and speed of getting around and the proximity of main attractions.
- The cost for accommodation tends to be lower in Spain and quality higher so the Spanish are likely to have higher expectations when it comes to paying so allow for a great service to top up this expectation.
- Please offer information in Spanish in all sorts of communication tools: websites, brochures, leaflets, signs and so on.
- Spanish guests tend to be straightforward, talkative and expressive in their body language.
- English breakfast is largely appreciated by Spaniards who really enjoy the traditional angle when travelling to Britain, although in Spain it is only served in hotel chains in the form of buffets as Spanish breakfast is lighter. Coffee is usually taken for breakfast and Spanish like strong and good quality coffee.
- Please have plenty of mineral water and bread available over lunch and dinner. Spanish also tend to use utensils to eat most food; even fruit is taken with a knife and fork.
- Spaniards most commonly eat late. Lunch, which is the main meal, is eaten between 14:00 and 15:30 and during the weekends an aperitif before lunch is usually taken in the form of a tapa and a drink. Dinner is late from 21:00 and as well an aperitif may be taken prior to dinner.



4.3 Caring for the consumer (2/2)

Advice on caring for Spanish consumers

- Spain has no single national cuisine but comprises of many regional ones. Spain is avant-garde in the gastronomy field with a high quality and large variety of products. This is why food and drink is largely appreciated when travelling abroad.
- British pubs are very much enjoyed by Spanish visitors. Pub food and roast beef is also very much appreciated by the Spanish who enjoy the local traditions.
- Spanish visitors still tend to often perceive the quality of British food lower than the Spanish quality of food. So in many cases they tend to look for international cuisine restaurants, Indian, Chinese, Japanese, Turkish, Thai, with good affordable rates.
- The Spanish are more likely to pay with a credit card when abroad than when at home. Leaving a tip is not as customary in Spain, but if the service and food has been good, they would leave a 5% tip or a few coins to round up the sum.





VisitBritain™



VisitEngland™

Useful links and further information

Appendix

Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the [Tourism Exchange GB platform](#) – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

[Opportunity search](#) or [trade website](#)

or contact the B2B events team
(Email: events@visitbritain.org)

or campaign partnerships team
(Email: partnerships@visitbritain.org)

or trade support team
(Email: tradesupport@visitbritain.org)

or VisitBritain shop team
(Email: product@visitbritain.org)



Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain as a GREAT Britain** campaign partner and through our global and regional marketing campaigns.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our [Discover England Fund page](#).

To find out more information, browse:

[VisitBritain's mission](#)

[The Government's Tourism Action Plan](#)






[VisitBritain's events](#)

[Business Recovery Webinars](#)

Appendix 1: Working with VisitBritain (3)

VisitBritain's global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit our page on [understanding our customers](#).
- In Spain, VisitBritain focuses on two audience segments among the international travellers:
 - Buzzseekers in Spain:** Often young independent travellers, looking for adventure, buzz and immersive experiences
 - Explorers in Spain:** Empty nesters and families who look for active outdoor experiences as well as immersing themselves in culture

Segments (& global attributes)	Global market share	Market share in Spain
 Buzzseekers (free spirited and spontaneous, they like holidays full of action and excitement)	38%	25%
 Explorers (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	25%
 Adventurers (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	12%
 Sightseers (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	19%
 Culture Buffs (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	18%

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest [monthly](#), [quarterly overall](#) and [quarterly by area](#) data from the International Passenger Survey by ONS.
- [Inbound Tourism Trends by Market](#)
- [Inbound activity data](#)
- [Inbound nation, region and country data](#)
- [Inbound town data](#)
- [Sector-specific research](#) which includes topics such as accommodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- [2021 Inbound Tourism Forecast](#)
- [Britain's competitiveness](#)

We are here to support you and look forward to working with you.

To find out more about Spain or other inbound markets browse our:

[Markets & segments](#)

[Inbound research & insights](#)

Or contact us directly
(Email: research@visitbritain.org)



Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- [COVID-19 consumer sentiment tracker](#)
- [Perceptions of Britain overseas](#)
- [Planning, decision-making and booking cycle of international leisure visitors to Britain](#)
- [Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more](#)
- [Food & drink research](#)

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Or contact us directly
(Email: research@visitbritain.org)



Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey (IPS)** is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our [IPS page](#).
- **Oxford Economics** tourism forecasts are from the 9 June 2021 update of the 'Global Travel Service' databank. Other information on Spain and the Eurozone were updated 8 June 2021.
- **Apex** data was last updated with March 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, May 2021.
- **VisitBritain/IPSOS 2016** refers to the '[Decisions & Influences](#)' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Ipsos-Anholt Nation Brands Index (NBI)** was carried out online in July/August 2020 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our '[How the world views the UK](#)' foresight.



Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.



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Market and Trade Profile: Spain

June 2021