Inbound COVID-19 Sentiment Tracker

Market Snapshot – Spain

Read the full report for Wave 3 here (PDF, 7.6MB)
Spain Market Summary

**Travel intentions**

Intending to travel abroad for leisure*:
- Wave 1: 72%
- Wave 2: 77%
- Wave 3: 81%

Journey purpose:
- Holiday: 90%
- Visit friends or relatives: 30%
- Other leisure purposes: 21%

Planning stage:
- Trip booked: 3%
- Destination chosen: 38%
- Trip planned: 32%
- Intend to travel: 27%

Among leisure trip intenders:
- 78% consider Europe
- 12% consider Britain

Among Britain intenders:
- 49% consider England
- 49% consider Scotland
- 26% consider London
- 16% consider Wales

*(% definitely & probably) in the next 12 months

**Travel preferences**

Top activities:
- History and heritage: 60%
- Visiting cultural attractions: 47%
- Outdoor nature activities: 44%
- Dining out: 44%
- Iconic tourist attractions: 44%

Destination types:
- 32% Small/mid-sized city/town
- 25% Will roam around
- 11% Country/village
- 20% Mountains or hills

Top Travel Companions:
- With your spouse/partner: 75%
- With children (under 18): 31%
- With friends: 23%
- With adult family members: 19%
- Alone: 15%
- As part of a tour group: 2%

Top Accommodation:
- Hotel chain: 67%
- Boutique hotel: 47%
- Private rental: 32%
- Friend’s/family house (free guest): 29%
- Self catered property: 28%

Top modes of transport within Britain:
- Domestic flight: 41%
- Public transport - Train: 34%
- Rented car/vehicle: 34%

Top modes of transport to Britain:
- Plane – via nonstop flight: 95%
- Plane – via connecting flight: 79%
- On foot – via Eurostar/Train: 48%

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated
Spain Market Summary

### Top travel drivers

#### ...for any international trip
- Money-back guarantee should I wish to cancel my trip: 40%
- Hygiene & safety protocols in place at destination: 37%
- Removal of quarantine policies in destination country: 32%
- Decrease in coronavirus cases at destination: 31%
- An attractive offer e.g. discounts on flights or accommodation: 30%

#### ...for a trip to Britain
- Money-back guarantee should I wish to cancel my trip: 38%
- Decrease in coronavirus cases at destination: 30%
- Removal of quarantine policies in destination country: 29%
- Hygiene & safety protocols in place at destination: 28%
- An attractive offer e.g. discounts on flights or accommodation: 26%

### Travel Concerns – for travel to Britain*

- Other people not following COVID-19 policies/procedures: 86%
- Access to healthcare if I contract COVID-19 abroad: 86%
- Change in quarantine requirements on my return home: 86%
- Contracting COVID-19 during my journey/trip: 83%
- Limited / restricted experiences at destination: 83%
- Costs of mandatory COVID-19 tests: 83%
- Extra admin involved with new policy/rules during the trip: 82%
- Affordability of robust travel insurance: 79%
- Accessibility of affordable air fares: 75%
- Locals’ attitude towards international tourists: 73%

### Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 76%
- I will favour local destinations instead of traveling internationally: 72%
- I will look for less crowded places, even if I miss attractions: 72%
- I will think more about sustainability when planning future holidays: 70%
- I will travel internationally as soon as I can after I get the vaccine: 66%
- I will leave booking until later/last minute: 63%
- Booking through a travel agent is a safer option at the moment: 59%
- I would be comfortable using public transport within the destination: 58%
- I will be intending to take fewer but longer holidays: 50%
- I will favor destinations I have been before rather than new places: 46%
- Due to covid-restrictions, I will have more annual leave to use: 42%

---

*% very & somewhat concerned

**% completely & somewhat agree

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated