

## Holidays to Spain: Inc Impact of COVID-19 - UK - November 2020

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“The British love affair with Spain has suffered a period of enforced separation, but will be rekindled once COVID-19 has finally waned. A ‘Welcome Back’ marketing campaign can remind visitors what they have missed the most. This will not be the time for a reinvention of Spain’s traditional appeal.”

– **John Worthington, Senior Analyst, 1 November 2020**

This report looks at the following areas:

- The impact of COVID-19 on holidays to Spain.
- Future interest in visiting Spain and likely behavioural changes amongst visitors in 2021.
- Future interest and opportunities in types of holiday to Spain.
- The main attractions of Spain as a holiday destination.

Almost a quarter of adults (as at September 2020) said they would consider visiting Spain before COVID-19 is fully over. This would obviously depend on a number of factors including government advice against non-essential travel, quarantine arrangement and the level of infections in the UK and regions of Spain visited. Any who do visit in the opening months of 2021 are likely to show significant behavioural changes. Visitors will be far more health and safety conscious and will also seek out less crowded areas to stay. Last-minute booking will be the norm and visitors will seek advice from travel experts.

Tentative growth is expected to gather pace only when the health threat of the pandemic has fully receded. In the longer term, consumer demand is expected to fully return. Mintel expects the market value of holidays to Spain to surpass pre-COVID levels in 2025, but volumes are still likely to remain short.

The biggest threat, once the pandemic begins to recede, is the impact of the ‘COVID-19 recession’, coupled with the potential economic disruption of Brexit when the UK leaves the EU in January 2021. A longer lasting economic slump could see consumers switching in large numbers from overseas to domestic holidays, particularly if the Pound continues to fall.

Looking further ahead, Spain’s popularity as the UK’s favourite sun, sea, sand destination will kick-start the post-COVID recovery, but future opportunities lie in diversification into other, higher value and more ‘sustainable’ tourism products, including Spain’s heritage cities, independent touring/active and ‘slow travel’, and special interest holidays.

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The rise in lockdown hobbies will feed into special interest travel

## The Market – Key Takeaways

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## Impact of COVID-19 and Brexit on Holiday Taking in Spain

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Future potential for diversification includes...

...independent touring

...active travel

...and special interest

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## Main Attractions of Spain

The traditional strengths of Spanish weather and beaches are most likely to entice Brits back

Gastro-Spain has become a major selling-point

Spain's value for money appeal is likely to be attractive in the post-COVID/Brexit economy

Appeal of the 'Spanish way of life' has heightened resonance in an era of anxiety and restrictions

One in five visitors sees themselves as a 'real Hispanophile'

Pent-up demand is expected for summer music festivals

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