

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

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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.



"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

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **COVID-19: market context (created 1 November 2020)**
- **Economic and other assumptions**
- **Products covered in this Report**

EXECUTIVE SUMMARY

- **Impact of COVID-19 on holidays to Spain**
Figure 1: Short-, medium- and long-term impact of COVID-19 on holidays to Spain, 1 November 2020
- **The market**
- **Spain's record rise in British holidaymakers brought to a halt by COVID**
Figure 2: Forecast* volume of holidays to Spain, 2015-25 (prepared on 1 November 2020)
Figure 3: Forecast* value** of holidays to Spain, 2015-25 (prepared on 1 November 2020)
- **Companies and brands**
- **Slow travel and 'workcations' are among expected post-COVID trends**
- **The consumer**
- **Spain remains the most popular destination amongst Brits**
Figure 4: Holiday destinations visited in the last 5 years, September 2020
- **One in five adults were forced to cancel a holiday to Spain in 2020**
Figure 5: Impact of COVID-19 on holidays to Spain in 2020 and future intentions to visit, September 2020
- **Appetite for Spain will fully recover, but most don't expect to return before 2022**
Figure 6: Future interest in visiting destinations on holiday, September 2020
- **Behavioural changes amongst those visiting in 2021 will include health & safety...**
Figure 7: Attitudes towards choice of location and accommodation for holidays to Spain in 2021, September 2020
- **...package protection, expert advice & last-minute booking**
Figure 8: Attitudes towards booking holidays to Spain in 2021, September 2020
- **...and a boost for non-flight modes of travel**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 9: Attitudes towards travel modes for holidays to Spain in 2021, September 2020

- **Holiday property rentals, city breaks, touring, activity & hobby breaks have future growth potential**

Figure 10: Interest in taking future types of holiday in Spain, September 2020

- **Weather, beaches, food & drink are Spain's biggest attractions**

Figure 11: Main attractions of a holiday in Spain, September 2020

ISSUES AND INSIGHTS

- **Crisis and opportunity – beyond the beach**
- **COVID-19 could drive a lasting interest in less crowded locations**
- **'City & sea' holidays could offer a sustainable alternative to the frequent short break habit**
- **Post-COVID health focus can benefit active holidays**
- **The rise in lockdown hobbies will feed into special interest travel**

THE MARKET – KEY TAKEAWAYS

- **Holidays to Spain will bounce back but recovery is likely to be protracted**
- **Package trend expected to continue as travellers seek protection**
- **Rising city break segment has suffered a setback**
- **Older visitors offer the biggest long-term opportunity but will be more cautious about returning**

MARKET SIZE AND FORECAST

- **Tentative recovery expected to gather pace in 2021**
Figure 12: Short-, medium- and long-term impact of COVID-19 on holidays to Spain, 1 November 2020
- **Holidays to Spain reached record levels prior to pandemic**
Figure 13: Volume and value* of holidays to Spain, 2015-19
- **Spain saw trips decline more than 80% in 2020**
- **Island corridors could still offer a glimmer of hope for Q1 2021...**
- **...but demand is likely to remain subdued until second half of 2021**
- **Market value of holidays to Spain is expected to surpass pre-COVID levels by 2025**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Figure 14: Forecast* volume and value** of holidays to Spain, 2015-25 (prepared on 1 November 2020)

- **Forecasts**

Figure 15: Forecast* volume of holidays to Spain, 2015-25 (prepared on 1 November 2020)

Figure 16: Forecast* value** of holidays to Spain, 2015-25 (prepared on 1 November 2020)

- **A long-lasting recession could see a return to the 2009/10 staycation trend**

Figure 17: Volume and value* of holidays to Spain, 2015-19

MARKET SEGMENTATION

- **Pre-COVID package trend likely to continue**

Figure 18: Package holidays versus independent holidays to Spain, by volume, 2015-19

- **Holiday duration was shortening prior to pandemic**

- **Short city break trend severely disrupted by the crisis**

Figure 19: Holidays to Spain, volume by duration, 2015-19

- **Over-45s offer the biggest long-term potential; younger visitors offer near-term potential until the pandemic is over**

Figure 20: Volume and value of visits to Spain by UK residents, by age, 2019

MARKET BACKGROUND

- **The opening and closing of Spanish corridors**
- **Islands set to introduce COVID-19 testing on arrival**
- **UK airport testing could accelerate recovery**
- **Holidays to Spain remained ahead of France and Italy prior to COVID-19**
- **Greece may have benefited from UK quarantine policies in 2020**

Figure 21: Top 10 overseas holiday destinations, by number of trips, 2015-19

- **Holiday prices have fallen due to COVID-19 but are expected to rise again as the market recovers**

Figure 22: Annual average exchange rates, GBP versus euro, June 2016-October 2020

- **Spanish resorts retain a price advantage over France and Italy**

Figure 23: European holiday costs* in leading destinations, 2015-20

- **Spanish city break costs have fallen**

Figure 24: European city break costs*, August 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

COMPANIES AND BRANDS – KEY TAKEAWAYS

- Brands need to reassure safety-conscious travellers
- Post-COVID working patterns could offer opportunities
- No-fly holidays, Spain's heritage cities and slow travel expected to be post-COVID trends

LAUNCH ACTIVITY AND INNOVATION

- Spanish hotel chain offers free COVID-19 testing
- Canaries seek to attract post-COVID digital nomads
- Slow boat to Spain
- Pre-COVID launches included heritage cities promotion and themed touring holidays
- 'Challenge' walking holidays are likely to benefit from post-COVID wellness and nature trends

THE CONSUMER – KEY TAKEAWAYS

- A fifth of Brits were forced to cancel a holiday to Spain in 2020
- One in four consumers are prepared to holiday in Spain before COVID-19 is fully over
- Recovery is expected in 2021 but behavioural changes are likely
- Perceived risks of flying offer new opportunities for ferries and self-drive
- Beaches will remain a big draw but the future holds diversification opportunities

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **COVID concerns rising as second wave arrives**
Figure 25: Concerns about COVID-19, March–October 2020
- **Key 45–64s group likeliest to cut back on discretionary spend**
Figure 26: Reduction in discretionary consumer spend, April–October 2020
- **A third or less of consumers feel comfortable about travel**
Figure 27: Percentage of those feeling comfortable about travel activities, July–October 2020
- **Holiday booking plans fell again in August/September after signs of recovery**
Figure 28: Holiday booking and intentions, August 2019–September 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EXPERIENCE OF HOLIDAYING IN SPAIN

- **20% of Brits have visited mainland Spain and 22% the islands over the past 5 years**

Figure 29: Holiday destinations visited in the last 5 years, September 2020

Figure 30: Percentage of GB adults who have visited Spain on holiday in the last 5 years, 2013-20

- **France and Italy attract more higher income visitors than Spain**

Figure 31: Percentage of GB adults who have visited Spain on holiday in the last 5 years, by household income, September 2020

Figure 32: Demographic profile of holiday visitors to Spain, September 2020

- **Men under 35 have been the most likely to return to Spain post-lockdown**

Figure 33: When people last visited Spain on holiday, September 2020

IMPACT OF COVID-19 AND BREXIT ON HOLIDAY TAKING IN SPAIN

- **Attracting back those forced to cancel in 2020 will be a key priority**

Figure 34: Impact of COVID-19 on holidays to Spain in 2020 and future intentions to visit, September 2020

- **16-34s will be the first to return, over-55s the last**

Figure 35: Those who have visited Spain on holiday in the past 5 years versus future intentions to visit, by age group, September 2020

- **One in five adults thinks they are less likely to visit Spain because of Brexit**

Figure 36: Expected impact of Brexit on holidays to Spain, September 2020

FUTURE INTEREST IN VISITING SPAIN VERSUS OTHER DESTINATIONS

- **Future appetite for Spain is undiminished...**
- **...but consumers are most likely to consider a staycation in 2021**

Figure 37: Future interest in visiting destinations on holiday, September 2020

- **Advance booking for 2021 remains low as customers wait until the last minute**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 38: Those who have booked a future holiday to Spain, September 2020

VISITING SPAIN IN 2021 – IMPACT OF COVID-19 ON HOLIDAY BEHAVIOURS

- **Health & safety measures are key to attracting visitors until the pandemic is fully over**
- **Those prepared to travel will seek out low-infection areas...**
- **...and quieter locations**

Figure 39: Attitudes towards choice of location and accommodation for holidays to Spain in 2021, September 2020

- **Financial protection, expert advice and last-minute booking are set to be the norm for 2021**

Figure 40: Attitudes towards booking holidays to Spain in 2021, September 2020

- **Most visitors will continue to fly but COVID-19 could act as a catalyst for aviation-alternatives**

Figure 41: Attitudes towards travel modes for holidays to Spain in 2021, September 2020

FUTURE INTEREST IN TYPES OF HOLIDAY TO SPAIN

- **Beach resort holidays will remain the core product for Spain**
- **Interest in less well-known Spanish cities is likely to revive after COVID-19**
- **Self-catering rental property holidays will benefit from pandemic**
- **Future potential for diversification includes...**
- **...independent touring**
- **...active travel**
- **...and special interest**

Figure 42: Interest in taking future types of holiday in Spain, September 2020

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**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

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

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MINTEL

Figure 43: Main attractions of a holiday in Spain, September 2020

- **Food & drink is now as important for visitors to Spain as France**
- **More than just a beach**

Figure 44: Main attractions of a holiday in France, November 2019

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.