

# UNDERSTANDING THE INTERNATIONAL TOURIST: OPINION & DATA

**Looking beyond summer to fulfil latent longing for travel**

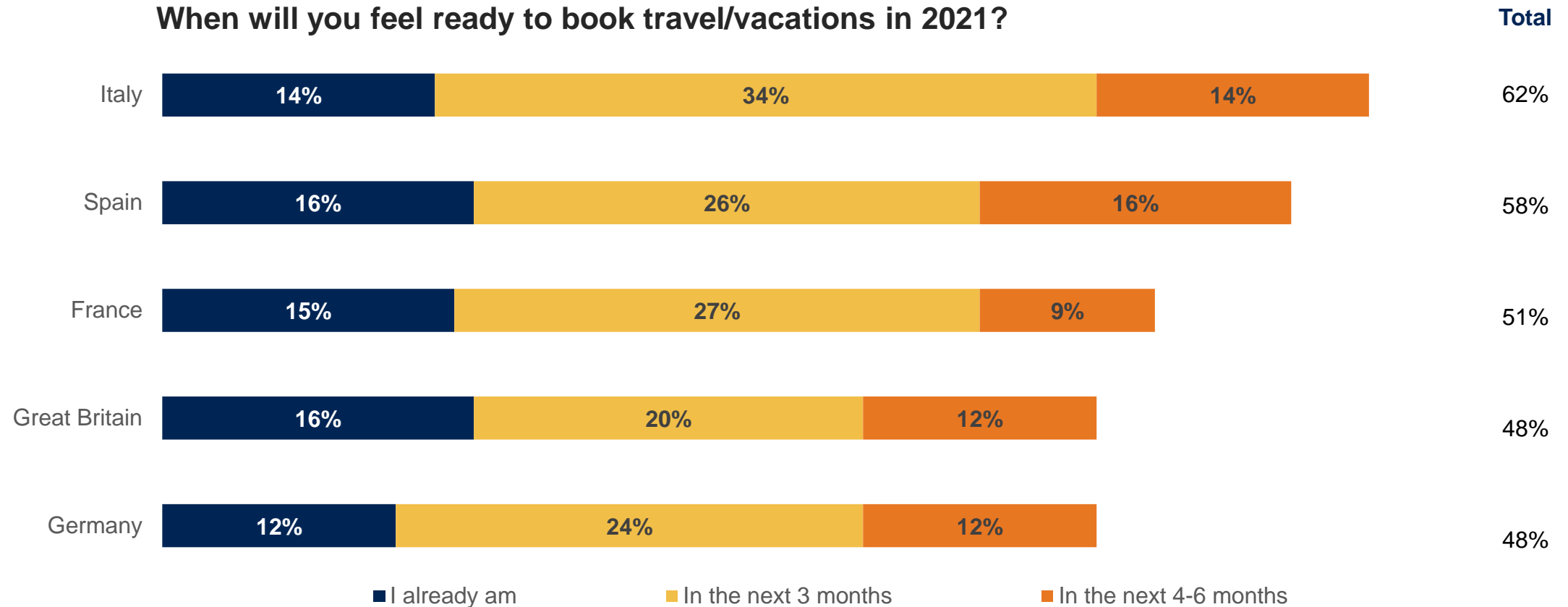
Eva Aranda (Ipsos) Sonia Huerta (Mabrian), Miguel Sanz (Turespaña)

June 2021



# LET'S NOT WRITE OFF 2021 YET

More than half of residents in 3 countries plan to travel in 2021



Source: Ipsos Essentials. Wave 42. 3-6 Junio 2021. Data from Germany, Great Britain, France, Italy and Spain.  
Q: For the following activity (book a holiday in 2021), when do you think you Will be ready to do it? Base: 2,688

# SIX MONTHS OF OPPORTUNITY

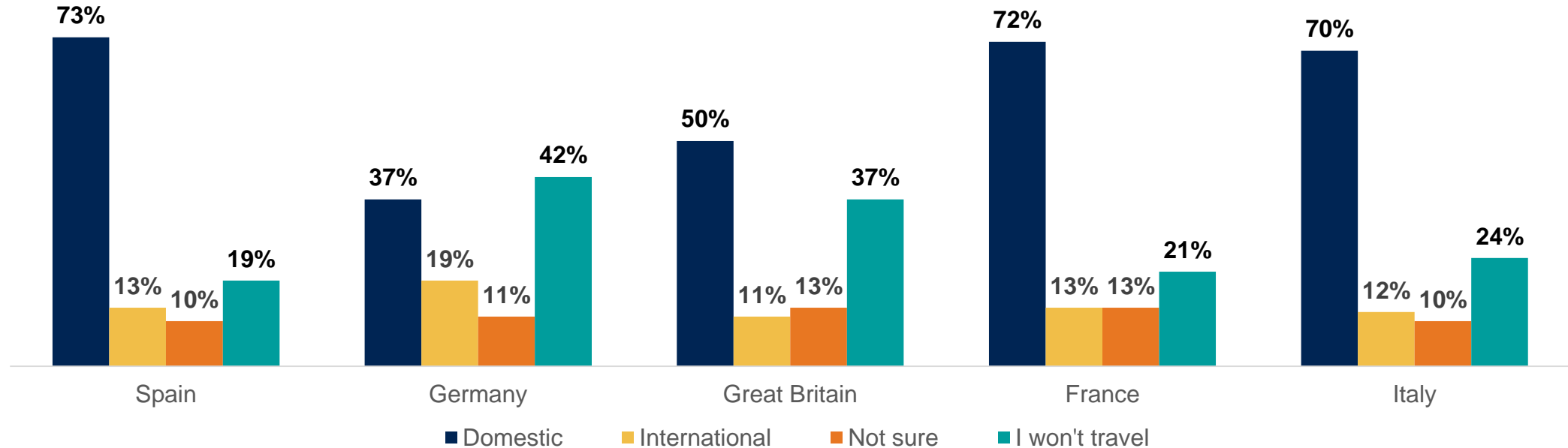
Germans and British waiting to be able to travel, not giving up on their trip abroad

Total of searches for domestic flights 2021 (millions)



Change vs. 2019

## % plan to go on holiday in the next 3 months



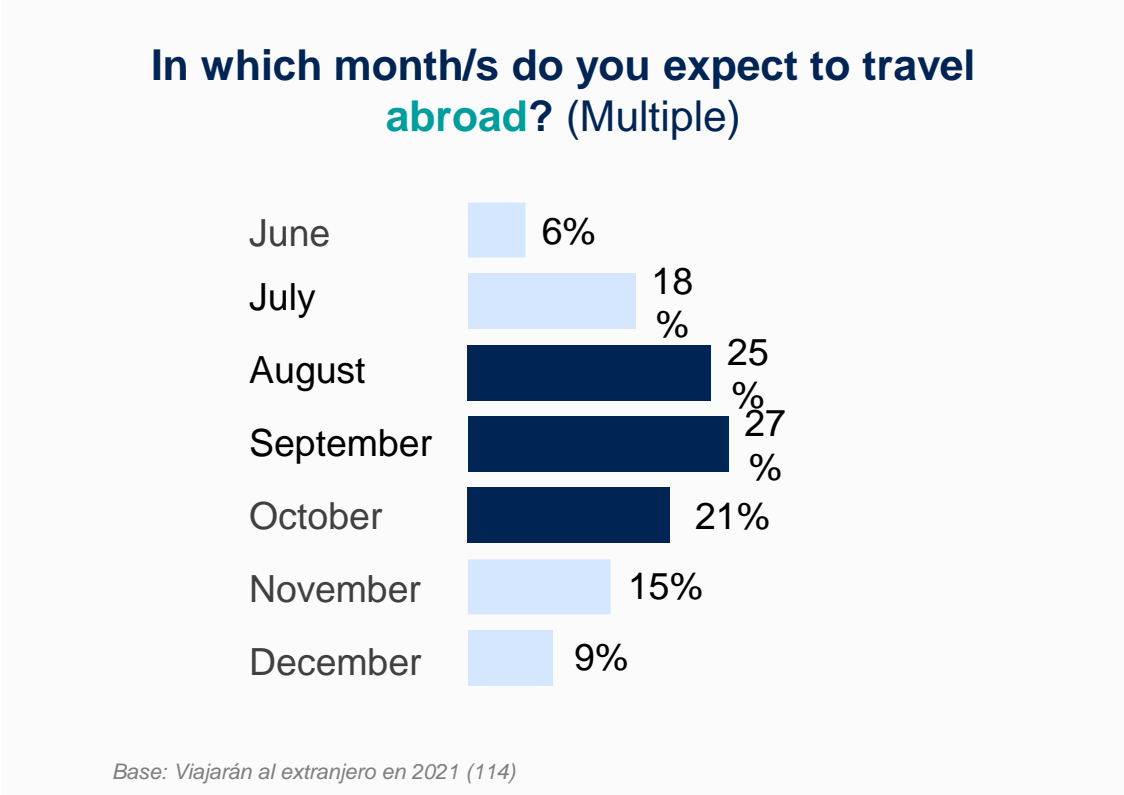
Source: Ipsos Essentials. Wave 42. 3-6 Junio 2021. Data from Germany, Great Britain, France, Italy and Spain.

Q: Are you planning to spend an overnight vacation away from your home in any of the following places in the next three months? Select all that apply. Base: 4,998

Mabrian: Domestic flight searches made between March and June, to travel between June and September 2021; compared to the same time in 2019.

# A TREND ALREADY SEEN IN TOURISTS TO SPAIN

Who will holiday in Spain during the traditional months vs. delay their trips abroad



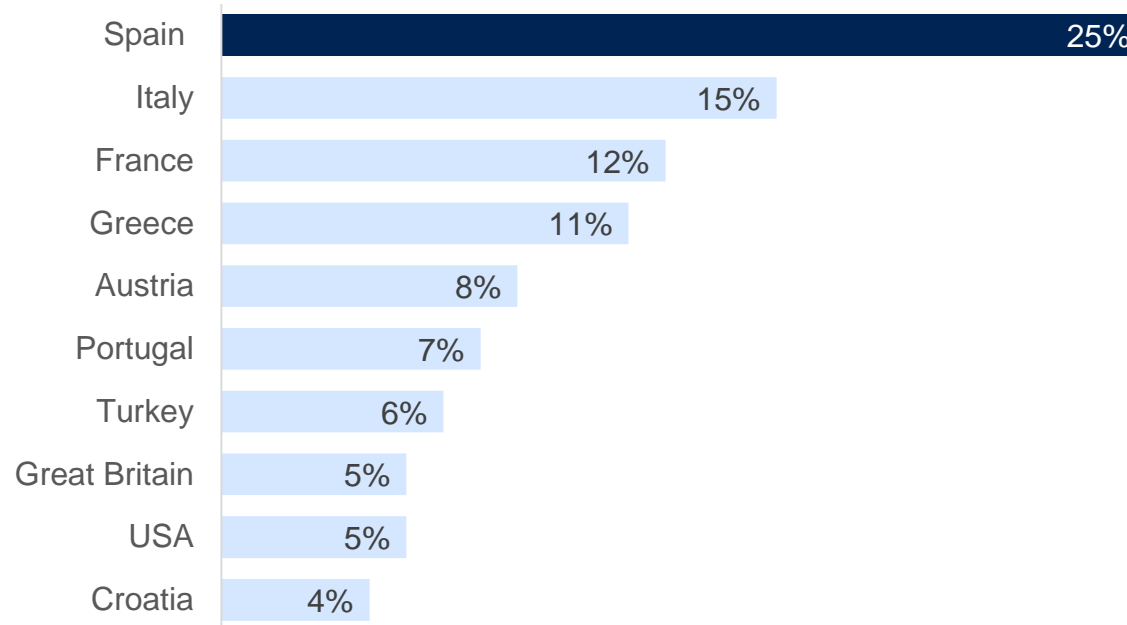
Source: Ipsos National tourism study: 4-7 June 2021.  
 Q4: In which month/months will you travel within Spain?/ Q5.- In which month/s do you plan to travel outside of Spain?



# SPAIN IS THE PREFERRED DESTINATION FOR OUR KEY COUNTRIES IN THE SHORT TERM

Italy is ranked second, well behind Spain (10 points)

**Top 10 international destinations**  
among those who plan to take vacations in the next 3 months  
(Germany, England, Italy and France)



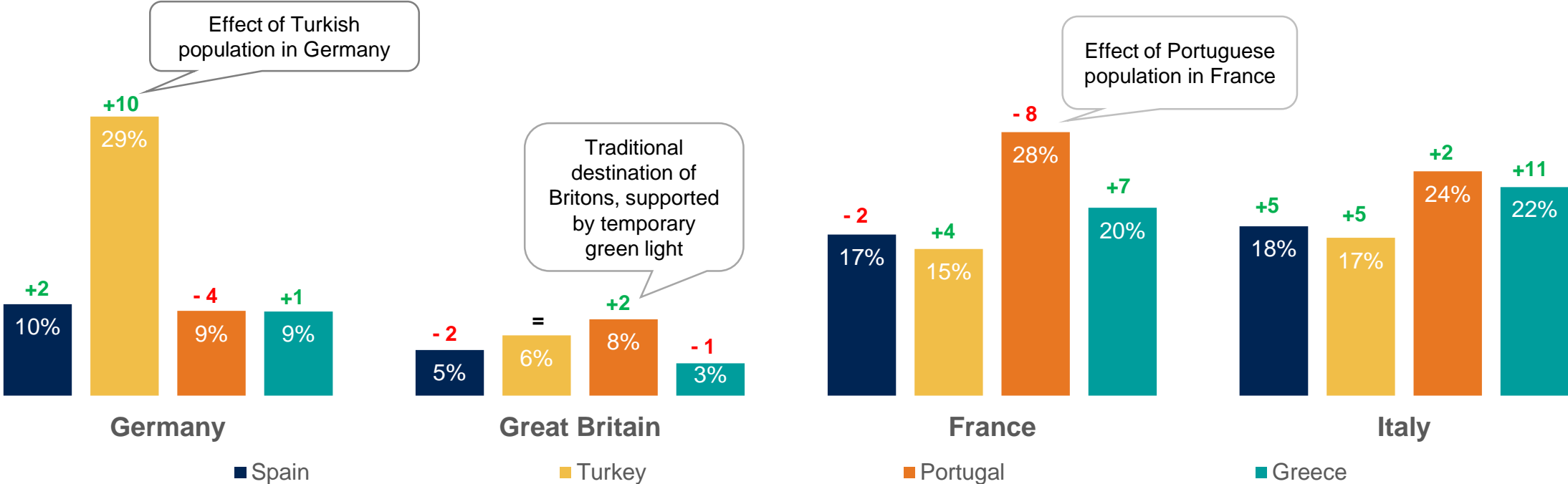
Source: Ipsos Essentials. Wave 42. 3-6 Junio 2021. Data from Germany, Great Britain, France, Italy and Spain.

Q: Are you planning to spend an overnight vacation away from your home in any of the following places in the next three months? Select all that apply. Base: 550

# LOOKING AT THE NUMBER OF FLIGHT SEARCHES, SPAIN MAINTAINS A COMPETITIVE POSITION

Including in countries where people could travel by car

**Number of searches in 2021 for Spain vs. others**  
(number of searches for flights per million) and change vs. 2019

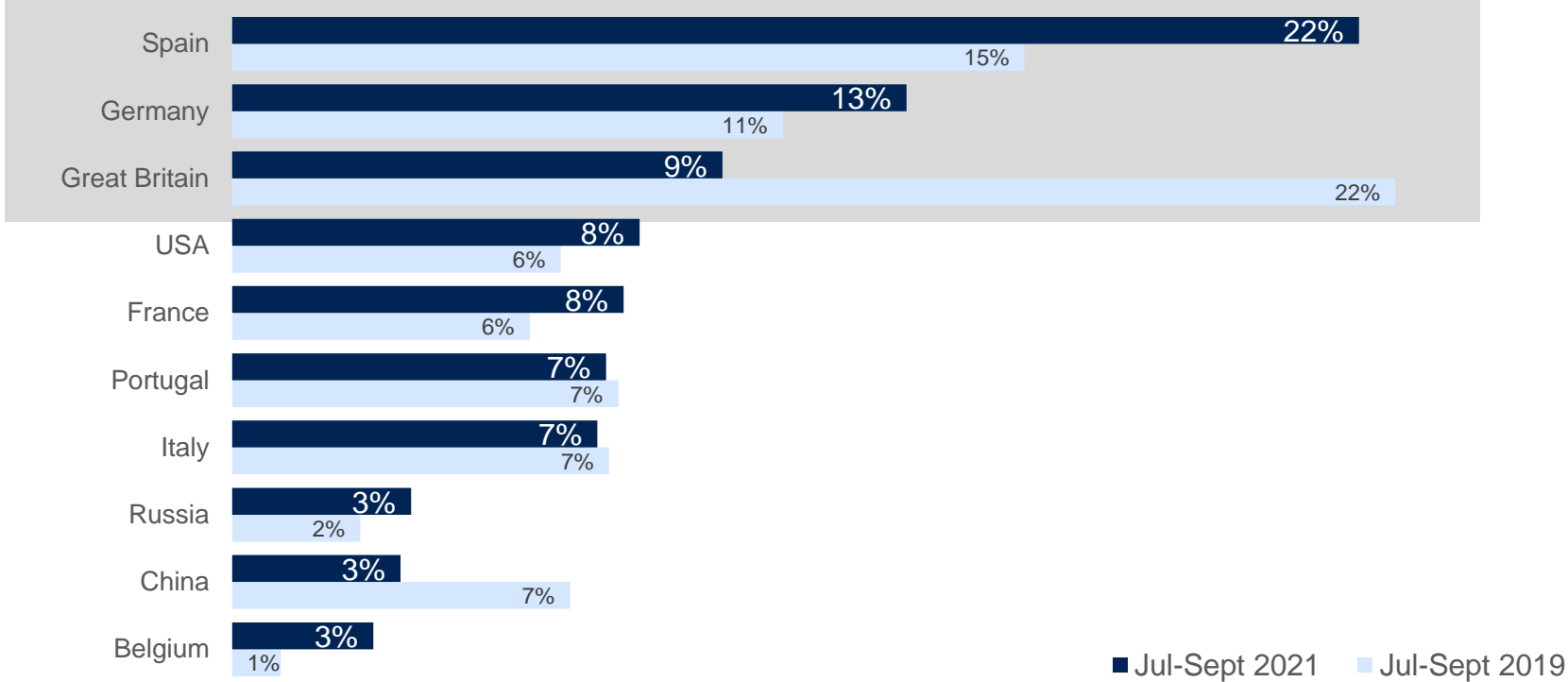


Source: Mabrian  
Number of flight searches for Spain and competitors made between March and June 2021 for travel between the months of July and September 2021; compared to the same period in 2019.

# CONSISTENT LEVELS OF INTEREST IN TRAVELLING TO SPAIN THIS SUMMER (FLIGHT SEARCHES)

Stagnated interest/demand from Britain, “staycation” trend

**Top 10 countries weighted (%) for demand**  
(flight searches to Spain)

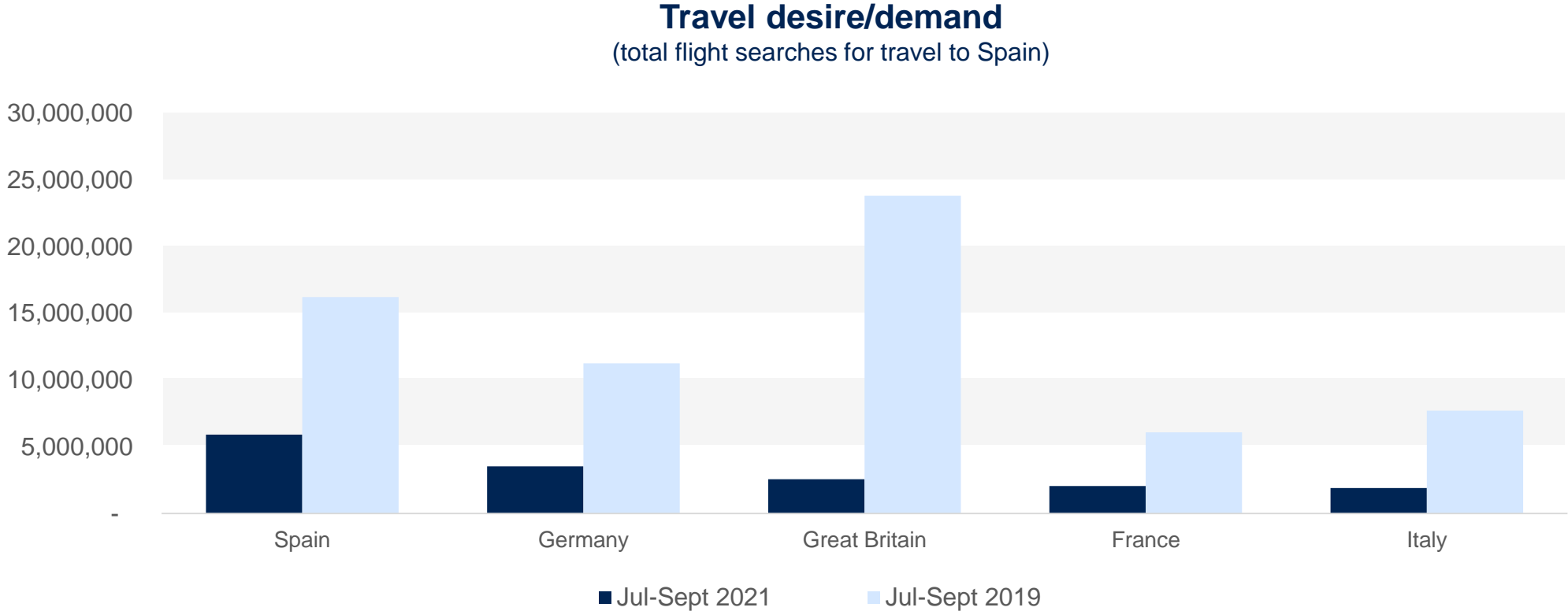


Source: Mabrian  
Number of flight searches for Spain and competitors made between March and June 2021 for travel between the months of July and September 2021; compared to the same period in 2019.



# HOWEVER, THE NUMBER OF FLIGHT SEARCHES TO SPAIN FROM KEY COUNTRIES OF ORIGIN IS TRAILING 2019 LEVELS

Travel desire for the summer period is an average of 27% below that of 2019



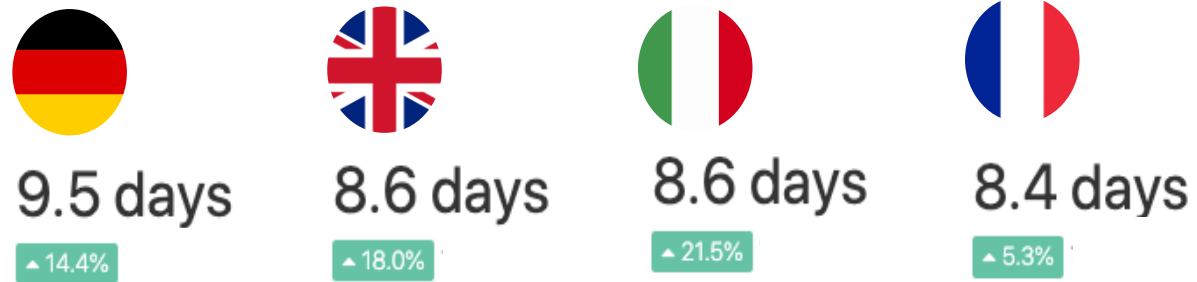
Source: Mabrian  
Number of flight searches for Spain and competitors made between March and June 2021 for travel between the months of July and September 2021; compared to the same period in 2019.





# SIGNIFICANT INCREASE IN THE AVERAGE LENGTH OF STAY WHEN LOOKING AT FLIGHTS TO SPAIN

## Average expected length of stay 2021 (days) and increase vs. 2019



The **average length of stay** for those travelling **by plane** has **increased** considerably **in all countries**

Source: Mabrian

Number of flight searches for travel to Spain made between March and June 2021 to fly between the months of July and September 2021; compared to the same period in 2019. Average length of stay calculated from flight searches between selected dates.

# THE TOP 10 MOST SEARCHED DESTINATIONS IS UNCHANGED, BUT THE BALEARIC ISLANDS IMPROVE THEIR POSITION IN THE RANKING

## Top 10 national destinations sparking greatest interest (flight searches) from Germany, England, Italy and France)

2019	2021	
1	1	Barcelona
3	2	Mallorca
2	3	Madrid
6	4	Ibiza
4	5	Malaga
7	6	Alicante
8	7	Valencia
5	8	Tenerife
9	9	Gran Canaria
10	10	Menorca

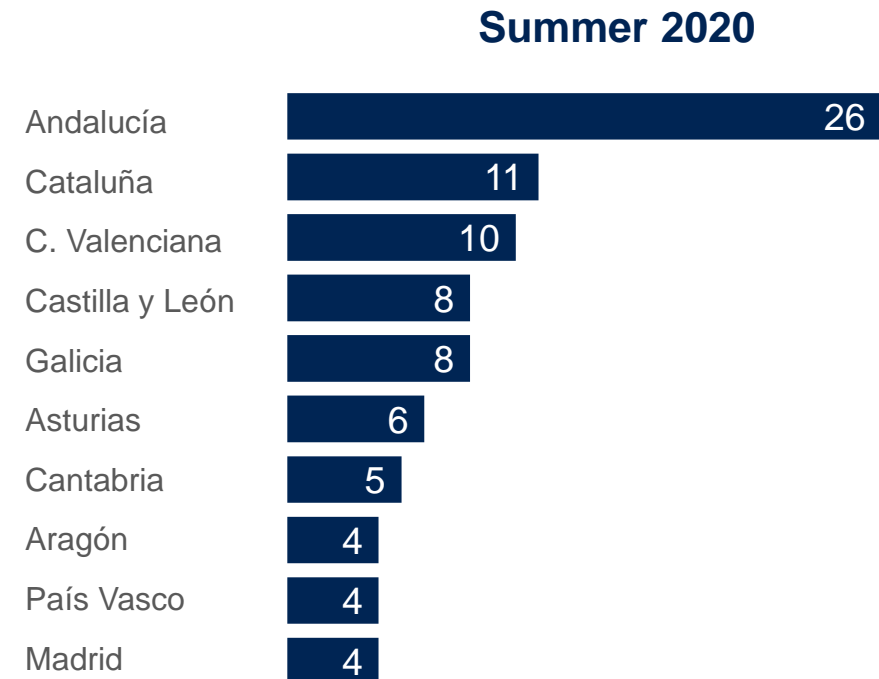
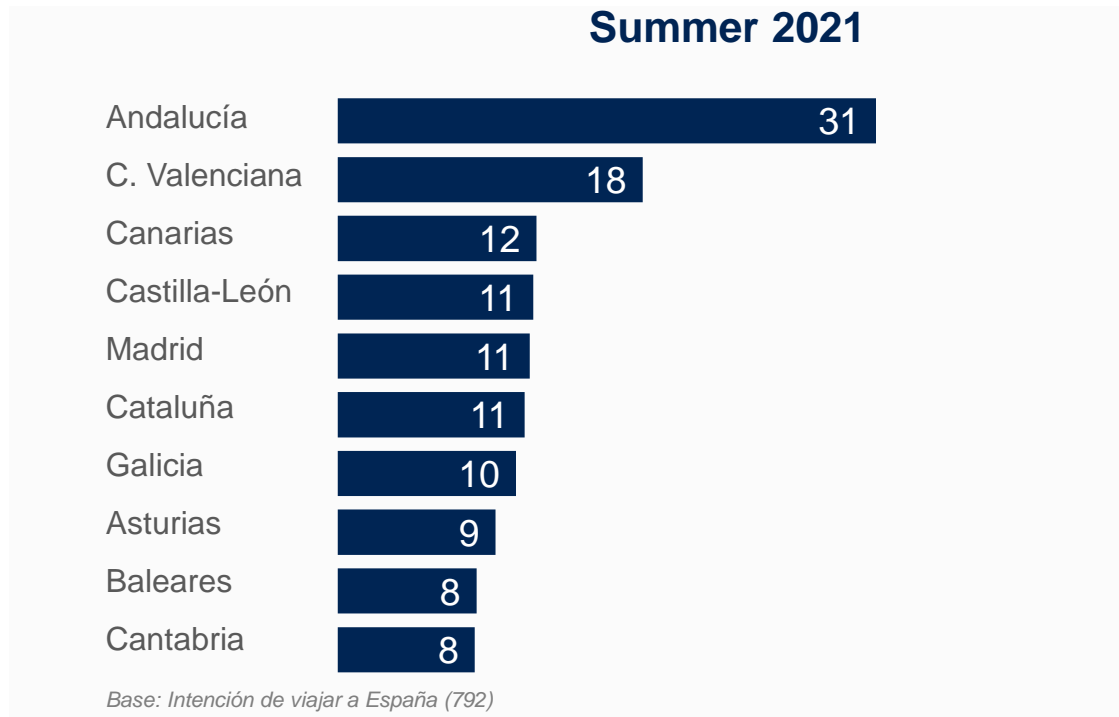
Source: Mabrian

Number of flight searches for Spanish destinations made between March and June 2021 to fly between the months of July and September 2021; compared to the same period in 2019. Average length of stay calculated from flight searches between selected dates.

# THE ISLANDS RETURN TO THE TOP 10 DESTINATIONS IN DEMAND

Largely due to the “affluent effect”

## Destinations most in demand for Spaniards



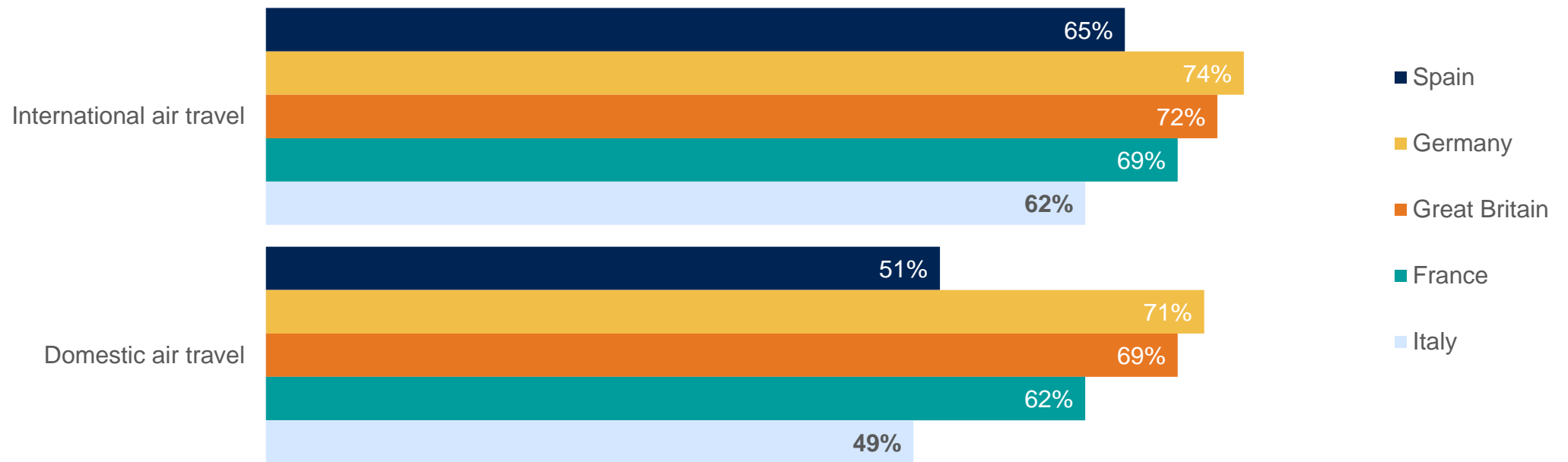
Source: Ipsos National tourism study: 4-7 June 2021.

Q9.- Which destination/s within Spain have you decided on or are you considering for your vacation? Select all that you are Thinking of visiting this year. Bear in mind that we are referring to trips of more than 3 nights away from your usual place of residence of homes of friends/family. Q9a – Which island/s are you thinking of visiting/planning to visit?

# GETTING ON A PLANE, AND BORDER RESTRICTIONS, CAN BE A DEAL-BREAKER FOR INTERNATIONAL TRAVEL

Countries accessible by road are key short-term

% **Do not** feel comfortable doing these activities during 2021

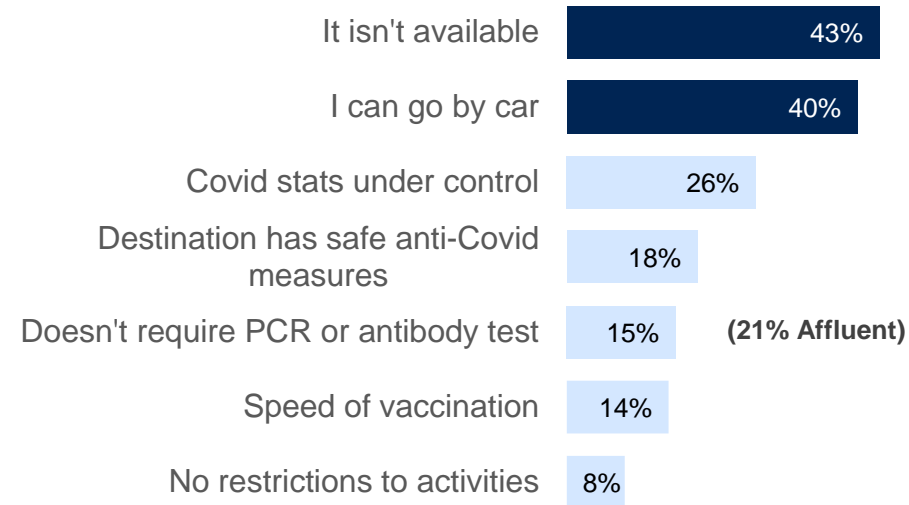


Source: Ipsos Essentials. Wave 42. 3-6 Junio 2021. Data from Germany, Great Britain, France, Italy and Spain.  
Q: For the following activities (...) when do you feel comfortable doing them?. Base: 2,688

# AVAILABILITY AND OWN TRANSPORT ARE KEY FACTORS SHAPING DESTINATION CHOICES FOR SPANIARDS

For 21% of “affluent” travellers, PCR tests affect their choice.

## Key factors in choosing a destination



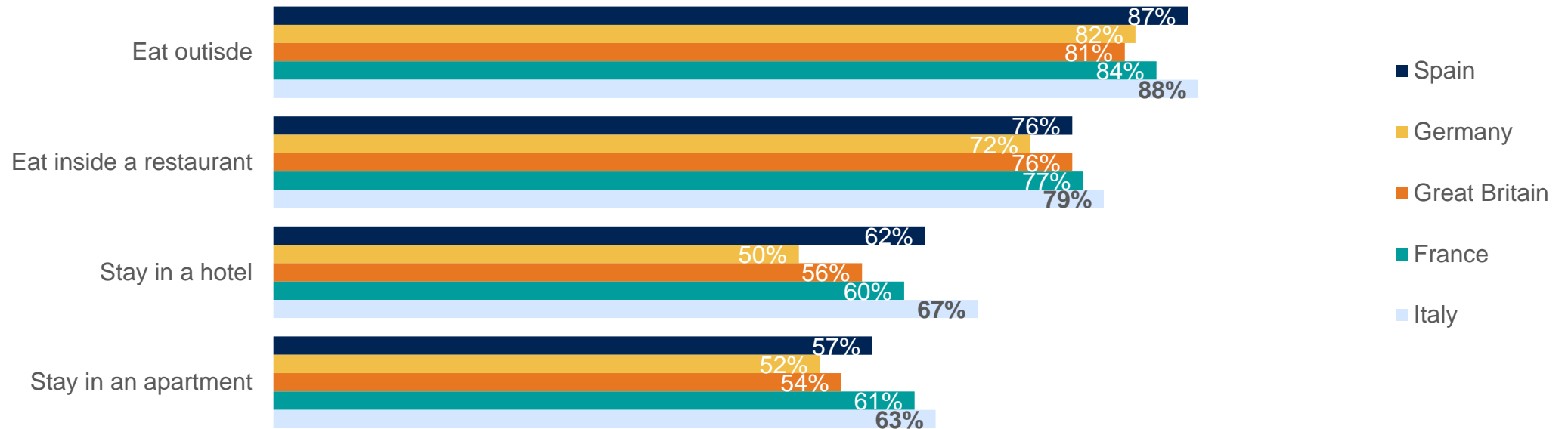
Source: Ipsos national tourism survey: 4-7 June 2021.

Base: Intention to travel to Spain in 2021 (Affluent 311, Total 792)

Q14.- Which factors will influence/have influenced your destination choice?

# PERCEPTIONS OF SAFETY IN HOTELS AND APARTMENTS ARE EQUAL

## % feel comfortable with these activities in 2021

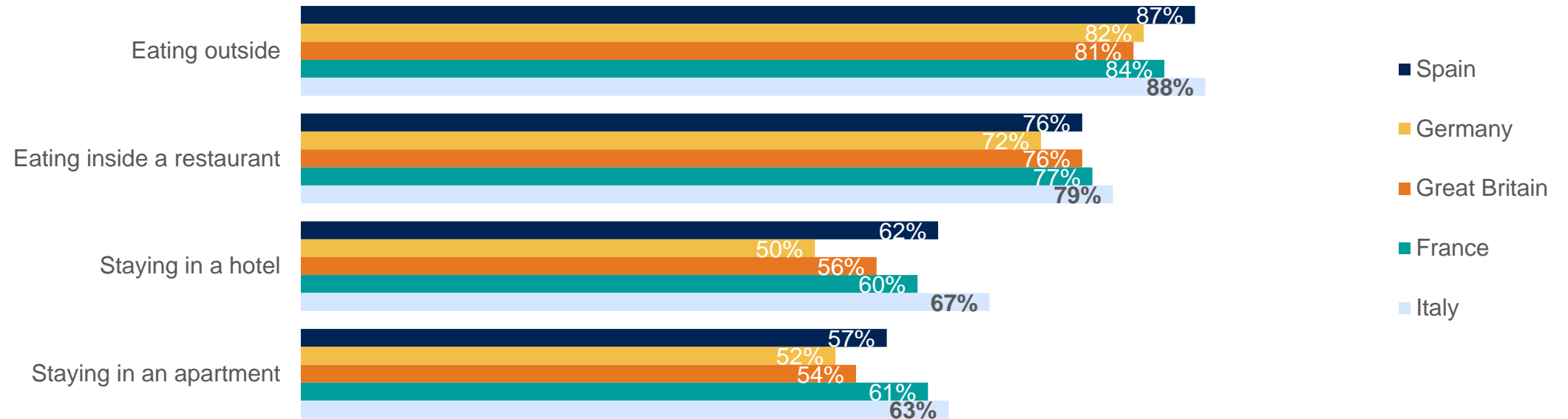


Source: Ipsos Essentials. Wave 42. 3-6 Junio 2021. Data from Germany, Great Britain, France, Italy and Spain.  
Q: For the following activities (...) when do you feel comfortable doing them?. Base: 2,688

# GOOD FOOD IS A GREAT ASSET FOR SPAIN TO HIGHLIGHT THIS YEAR

Eating outside is an important element to stress in marketing activities

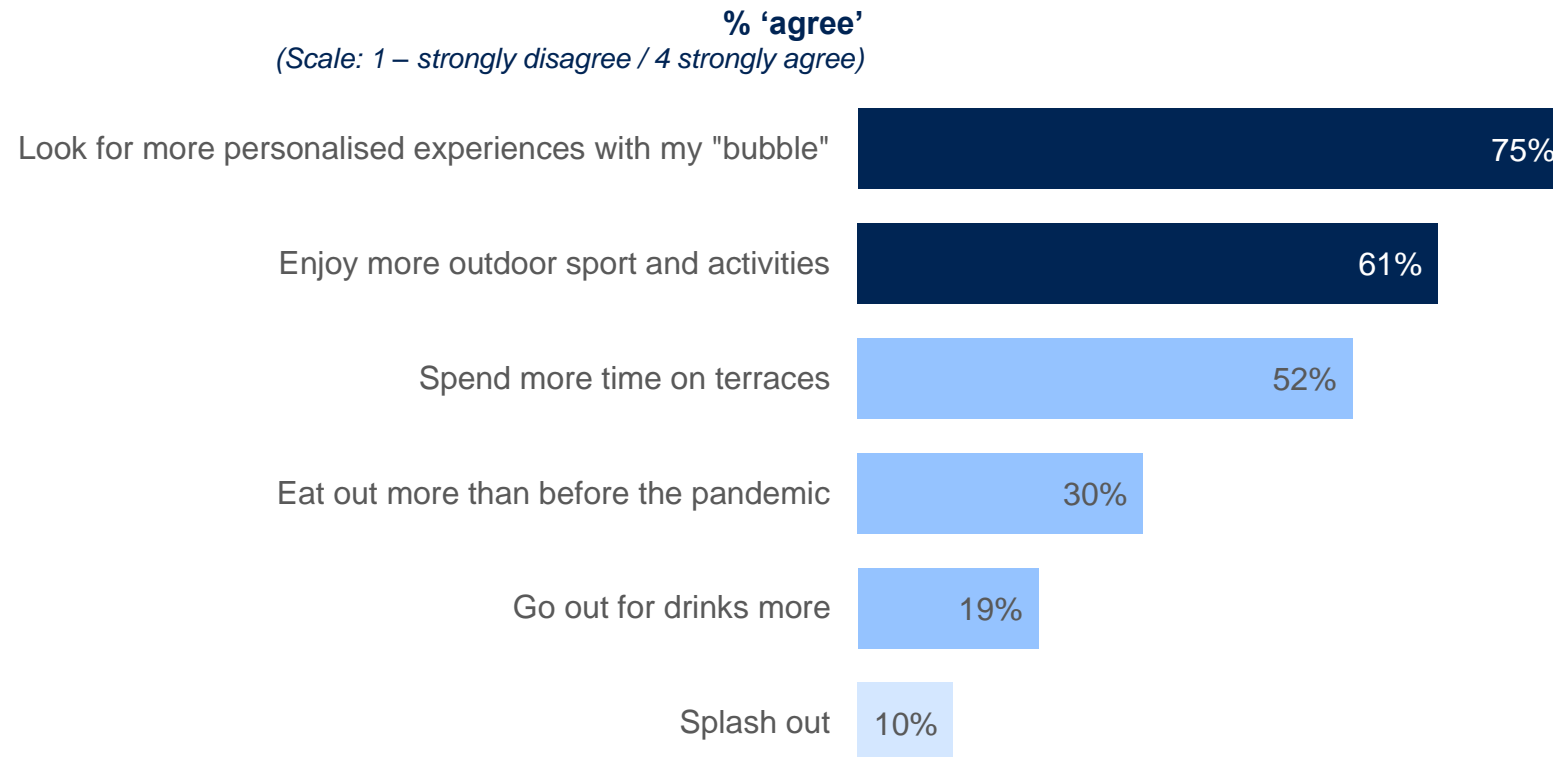
% feel comfortable with these activities in 2021



Source: Ipsos Essentials. Wave 42. 3-6 Junio 2021. Data from Germany, Great Britain, France, Italy and Spain.  
Q: For the following activities (...) when do you feel comfortable doing them?. Base: 2,688

# VACATION YES, BUT WITH CAUTION

Taking anti-Covid measures on vacation: group bubbles and fresh air.



Source: Ipsos Essentials. Wave 42. 3-6 Junio 2021. Data from Germany, Great Britain, France, Italy and Spain.

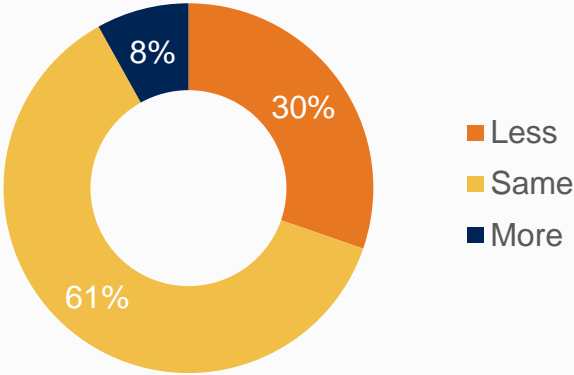
Q15.- To what extent do each of these phrases describe your attitude towards your next holiday in Spain? Base: Intention to travel to Spain 2021 (792)



# 70% WILL SPEND THE SAME, OR MORE, THAN IN 2019

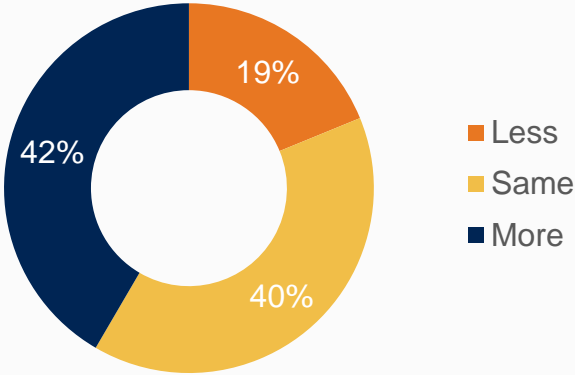
And 42% will spend more than last year

### Will you spend more, the same or less on a trip to Spain than before the pandemic?



Base: Viajarán a España en 2021 (573)

### Will you spend more, the same or less on a trip to Spain than 2020?



Base: Viajarán al extranjero en 2021 (114)

Source: Ipsos National Tourism study 4-7 June 2021.

Q10.- Would you say that you are prepared to spend on your trip to Spain; less, the same, or more than you spent Before the pandemic? / Q11 – And in comparison to last year (2020), would you say that you will spend less, the same, or more when travelling Spain in comparison to 2020?

# VACCINATION STATUS A DETERMINER OF TRAVEL

13% are waiting to be vaccinated before going on holiday

13%

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of Spaniards with no intention to travel **are waiting for the vaccine**

19%

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of Spaniards **will not travel for fear of infection**

14%

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of Spaniards **will not travel for fear their family will be infected**

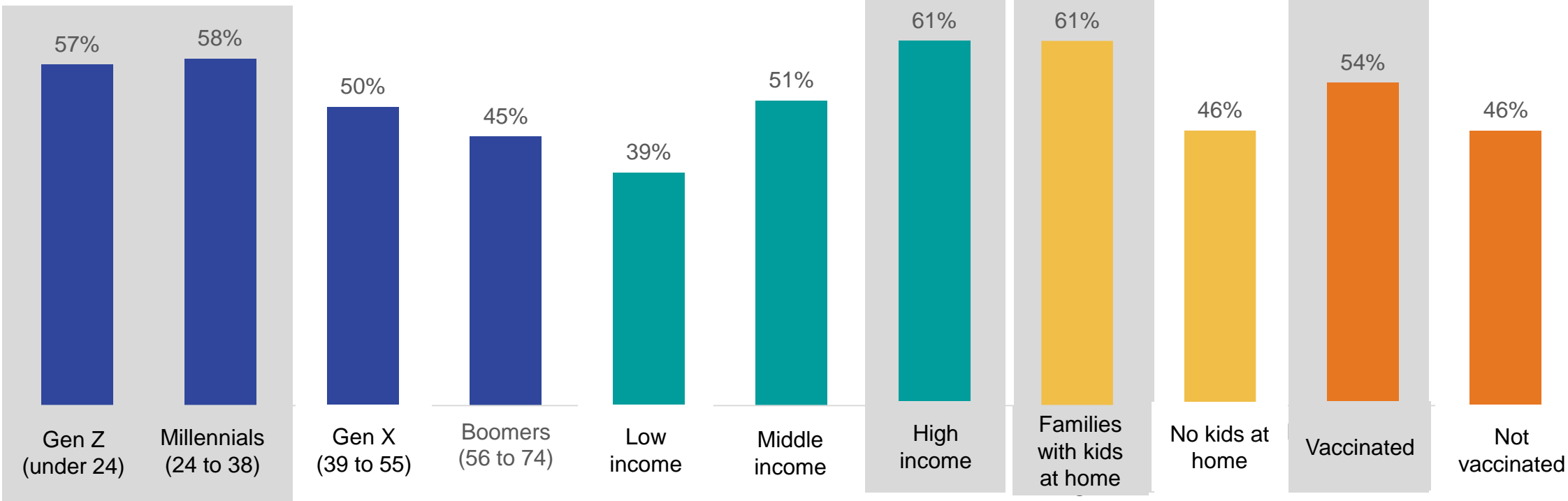
Source: Ipsos National Tourism study 4-7 June 2021.

Q16.- Why will you not travel within Spain this year? Base: Will not travel to Spain (243)

# THOSE WHO ARE YOUNGER, AND MORE WEALTHY ARE MORE LIKELY THAN AVERAGE TO TRAVEL INTERNATIONALLY

Families and those who have been vaccinated also show greater intention to travel, compared to average

## Plan to take an international vacation in the next 3 months



Source: Ipsos Essentials. Wave 42. 3-6 Junio 2021. All countries.

Q: Are you planning to spend an overnight vacation away from your home in any of the following places in the next three months? Select all that apply.

# 5 KEY LEARNINGS

1

**Let's not write off 2021.** There is a high latent demand, while people wait for vaccination or for the health situation to improve. 2021 tourism moves extends beyond the summer timeframe and there is a lot of intention to travel outside of the season.

2

**Facilitate tourist activities** (PCRs and quarantines) for outbound travel and when returning to the country of origin.

3

**Fight against uncertainty** through clear messaging and try to ease feelings of insecurity, i.e. when flying.

4

**Micro-segmentation:** It is important to communicate clearly and frequently to those with the highest intention to travel.

5

Highlight clearly the strong offer of **fresh air, outdoor dining and good weather.**

# APPENDIX

## METHODOLOGY & SAMPLE

# 1

# METHODS USED



## International survey

**Method:** Online survey through Ipsos online panel. Essentials monthly survey. Wave 42.

**Fieldwork dates:** 3 - 6 June 2021

**Sample:** 14,500 adults aged 18 to 74 years in Canada and the US and from 16 to 74 years in 14 countries: Australia, Brazil, China, France, Germany, Italy, Spain, India, Japan, Mexico, Russia, South Africa, South Korea and Great Britain.

**Error** ( $\pm 0,81\%$ )



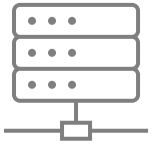
## Survey in Spain

**Method:** Online survey through Ipsos online panel.

**Fieldwork dates:** 4 - 7 June 2021

**Sample:** 1,035 adults surveyed (18 years old and over). National residents. Ceuta and Melilla not included.

**Error** ( $\pm 3,05\%$ )



## Big data

### Data and transactions:

- Searches for flights
- Airline capacity

### Dates:

- Searches carried out between 1 March and 14 June 2021 for travel between 1 July and 30 September.
- Direct capacity for travel between 1 July and 30 September.

**Countries:** Spain, UK, Germany, Italy and France

## FOR MORE INFORMATION

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