

# PERCEPTION OF THE EVOLUTION OF OUTBOUND TOURISM DEMAND IN SPAIN (Post-pandemic recovery)

The sample is comprised of responses from leading tourism trade industry professionals and travel journalists in Spain to our express consultation conducted in the last quarter of 2023. 62% of the sample are travel agents or tour operators.

**DECEMBER 2023:** Current perceptions of outbound tourism demand in Spain compared to pre-pandemic levels (2018-2019) reveal that 72% of respondents perceive an increase in demand. Looking ahead, the forecast for 2024 indicates that 26.09% are of the opinion that demand will remain constant, while 52.17% anticipate a growth in demand.

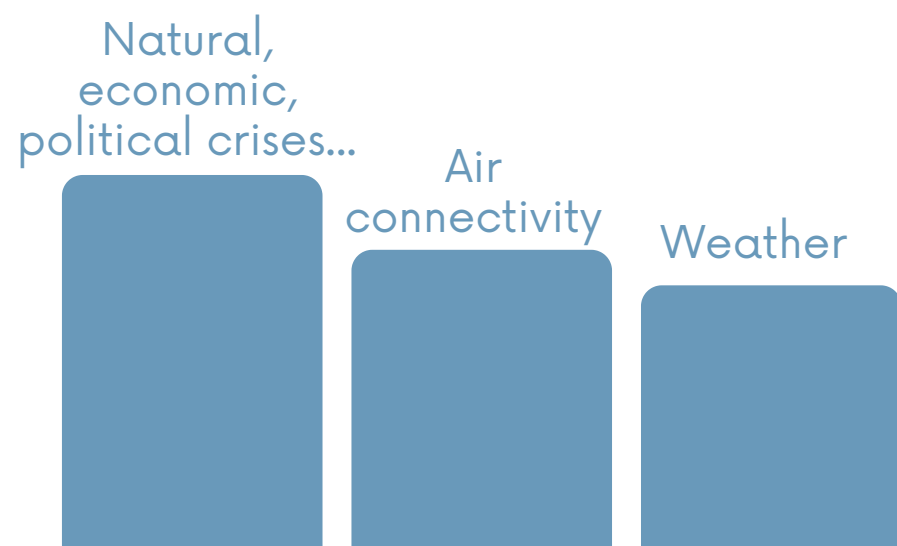
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## JOB 5

### SPAIN 2024

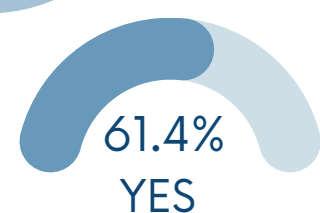
1. Andalusia
2. Canary Islands
3. Balearic Islands
4. Madrid
5. Galicia

### Top 3 factors that will influence travel in the near future



### TRENDS

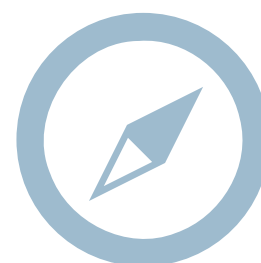
Shifting trends in travel seasonality



- ↑ Split annual leave days into more than one trip
- ↓ Fewer days in summer
- ↑ Long weekends

### Most important factors when choosing an international tourist destination

1. Cultural attractions
2. Natural attraction
3. Price
4. Security



## JOB 3

### LONG DISTANCE

- 1- Japan
- 2- Costa Rica
- 3- Thailand

## JOB 3

### MIDDLE EAST

- 1- Dubai
- 2- Egypt
- 3- Qatar

## JOB 3

### EUROPE

- 1- Portugal
- 2- Italy
- 3- France

### TRENDS

When consulting about the specific competitiveness of the following destinations, their positioning today is stronger than in 2018-2019: **Thailand, Dominican Republic, Costa Rica, Madeira, Estonia and Santa Eulària des Riu (Ibiza)**, with **Madrid, Thailand and Costa Rica** being the most competitive for respondents out of all of them.

### TRENDS

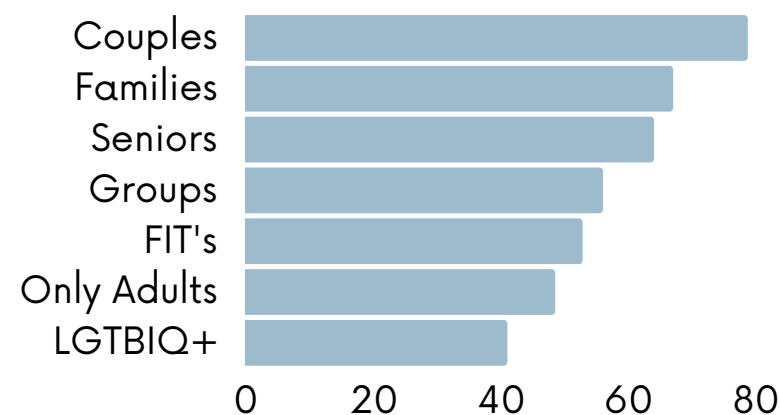
#### Most requested tourism product in 2018-2019

1. Package Holiday
2. Guided Tour
3. Flight Only
4. Cruise

#### Most requested tourism product in 2024

1. Package Holiday
2. Hotel
3. Guided Tour
4. Cruise

### TYPE OF TRAVELLERS WITH THE HIGHEST DEMAND



Predominant age range 55-65 years

