REPORT

THE PERCEPTION OF SPAIN AS A SUSTAINABLE TOURIST DESTINATION IN CHINA

Structure of the report

This report on the project „Analysis of the perception of Spain as a sustainable tourist destination in China" and the corresponding study to identify the most important sustainability factors for Chinese travellers and analysis of Spain's positioning in relation to these aspects is divided into three parts.

Part I of the report, from page 5 to page 39, summarises the results of the ad hoc online survey conducted in China in March 2005. In **Part II** (page 40 to page 60 + conclusion on page 61), the Destination Brand 23 data already purchased from TURESPAÑA Hong Kong on the subject of 'sustainability' and the assessment of Spain as a sustainable travel destination have been summarised and prepared as shown in the offer. **Part III** of the report presents the first fields of action and measures derived from the results of Parts I and II.

Structure of Part I of the report:

As introduction, you will find a brief overview of the methodology of the ad hoc online study, which was conducted in March 2005, on page 7. This is followed on pages 8 to 14 by a presentation of the structure of the respondents based on various criteria.

The presentation of the results begins with chapter 3 and the top 10 ranking of the destinations that the respondents would like to visit next.

Chapter 4 focuses on the general interest in 20 holiday activities selected by TourSpain.

Chapter 5 contains the results for 14 sustainability statements and, from page 26 onwards, the general preferences for organising their own holiday trips from the respondents' point of view are shown (Chapter 6).

From chapter 7 onwards, the focus is on the assessment of Spain as a holiday destination in the Chinese source market. On pages 29 to 35, the suitability assessment of Spain is presented for 10 holiday activities selected by TourSpain, including a detailed presentation for the holiday activity 'Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)' (see slides 33 to 35).

In the final chapter 8 of Part I, the subgroup 'Visitors in the past' evaluate Spain based on 17 selected aspects.

Structure of the report

Structure of Part II of the report:

As introduction, you will also find a brief overview of the methodology for the study ‘Destination Brand 23 - Tourist destinations as tourism and living spaces’.

Focusing on the topic of ‘sustainability’, the data purchased last year from TourSpain Hong Kong was analysed on this topic. The presentation of the results starts on page 44 with the top 10 ranking of destinations associated with the description ‘high sustainability of tourist offerings (nature preserving / environmentally friendly, economically and socially fair)’.

The presentation of the general relevance of various tourism aspects, offers and infrastructure is the focus of Chapter 3 (see pages 46 and 49), where the significance of the relevance of ‘Sustainability of tourist offerings’ is addressed.

Chapter 4 focusses on the evaluation of Spain as a travel destination in the Chinese source market. On pages 50 to 59, the assessment of Spain is presented for 15 offer and infrastructure elements, including a detailed presentation for ‘Sustainability of tourist offers’ (see slides 53 to 59) which includes also results based on socio-demographic differentiations and on the basis of 8 defined target groups.

<u>Note:</u> In addition to Spain, the following destinations were evaluated in the source market China (in alphabetical order): Austria, Denmark, Finland, Germany, Iceland, Monaco, Norway, Sweden, Switzerland and Zurich

Structure of Part III of the report:

The report concludes with **Part III** and the key takeaways of the presentation as well as first fields of action and measures for the future (further) positioning of Spain as a sustainable travel destination in the Chinese source market.

General information:

In addition to the presentation of results, initial descriptions and interpretation aids can be found on individual results charts – see grey boxes.

When interpreting the data, cultural differences in the response behaviour need to be taken into account leading to generally higher top-two-box values on scales asking to express interest, agreement or positive evaluations in the Chinese source market compared to e.g. European source markets or the USA.

Outline – Part I

1 STUDY DESIGN
2 DESCRIPTION OF THE RESPONDENTS
3 UNSUPPORTED NOMINATION OF TOURIST DESTINATIONS (TOP OF MIND)
4 GENERAL INTEREST IN HOLIDAY ACTIVITIES
5 AGREEMENT WITH SUSTAINABILITY STATEMENTS
6 GENERAL PREFERENCE TO ORGANISE OWN HOLIDAY TRIPS
7 SUPPORTED THEME SUITABILITY
8 SUPPORTED RATING OF ASPECTS

Outline – Part II

1 STUDY DESIGN
2 UNSUPPORTED NOMINATION OF TOURIST DESTINATIONS (TOP OF MIND)
3 GENERAL RELEVANCE OF TOURISTIC OFFERS AND INFRASTRUCTURE ELEMENTS
4 SUPPORTED EVALUATION OF OFFERS AND INFRASTRUCTURE

Outline – Part III

DERIVATION OF INITIAL FIELDS OF ACTION AND MEASURES
CONTACT & IMPRINT

PART I:

SUSTAINABILITY OF TOURIST DESTINATIONS

SOURCE MARKET CHINA

DESTINATION BRAND

Tourist destination Spain (西班牙)

► **Note:** Queried designation of Spain for Chinese respondents = “西班牙”

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2. Study design

Aim of research	– Customer-oriented study on the **perception of Spain as a sustainable tourist destination in the source market China**
Research focus	– **General** (i.e., independent of a specific destination) **interest in holiday activities** – **Agreement with sustainability statements** – **General** (i.e., independent of a specific destination) **preference to organise own holiday trips** – **Supported theme suitability** of Spain – **Supported rating of aspects** of Spain – Unsupported nomination of tourist destinations (top of mind)
Survey design	– **Total sample size:** 1,000 – **Online survey in the national language** (Chinese) – **Quota sample** based on age, sex and regional origin – **Representative** of the respective population aged 18-59 years living in private households
Survey period	– **March 2025**

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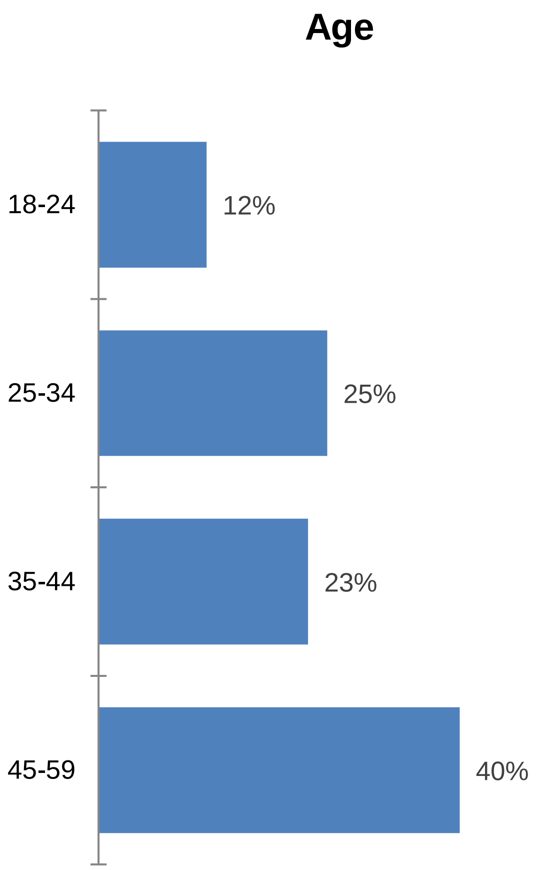
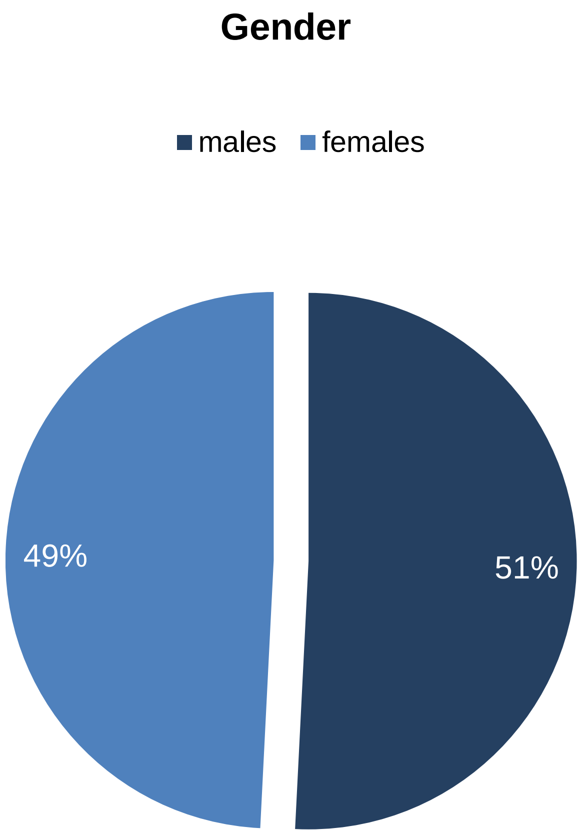
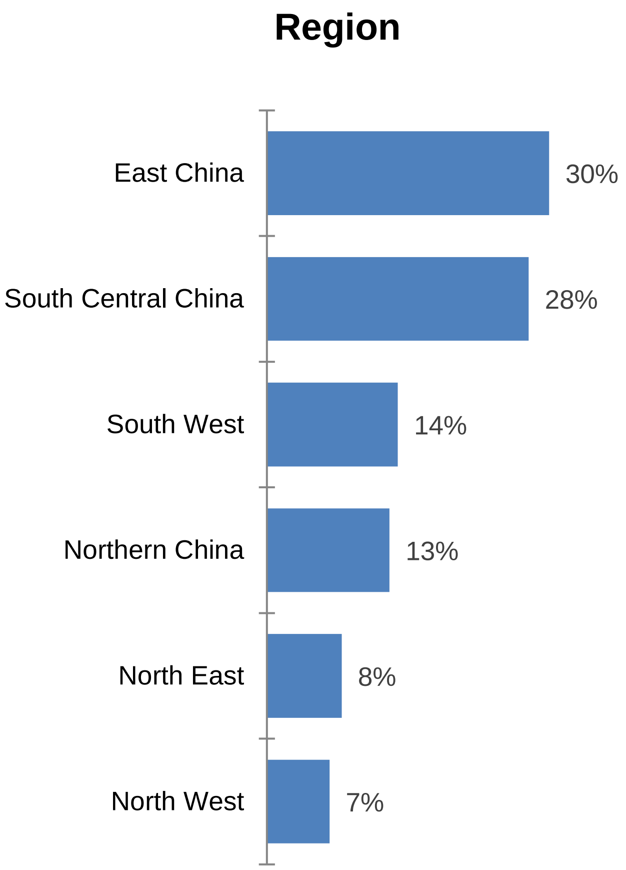
3. Description of the respondents

Base: All respondents (n = 1,000)



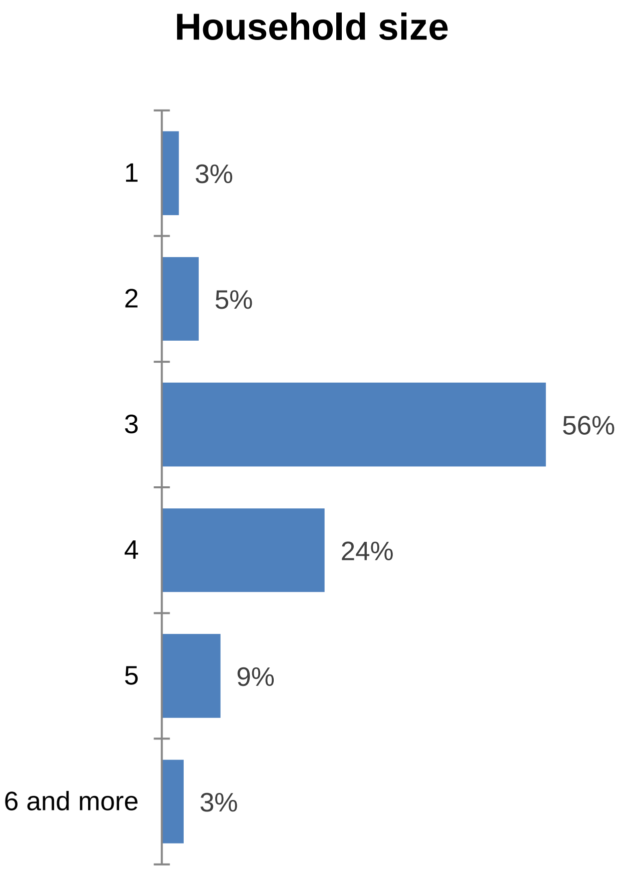


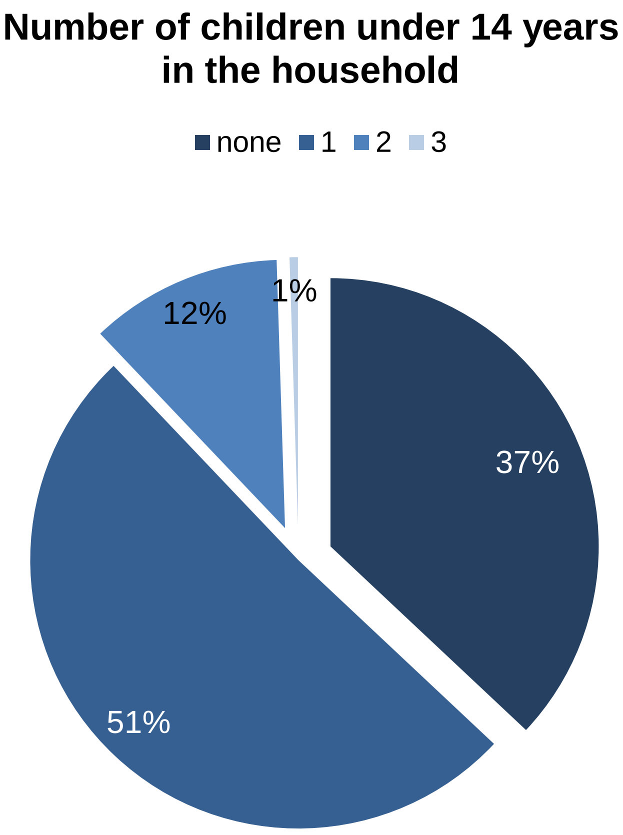


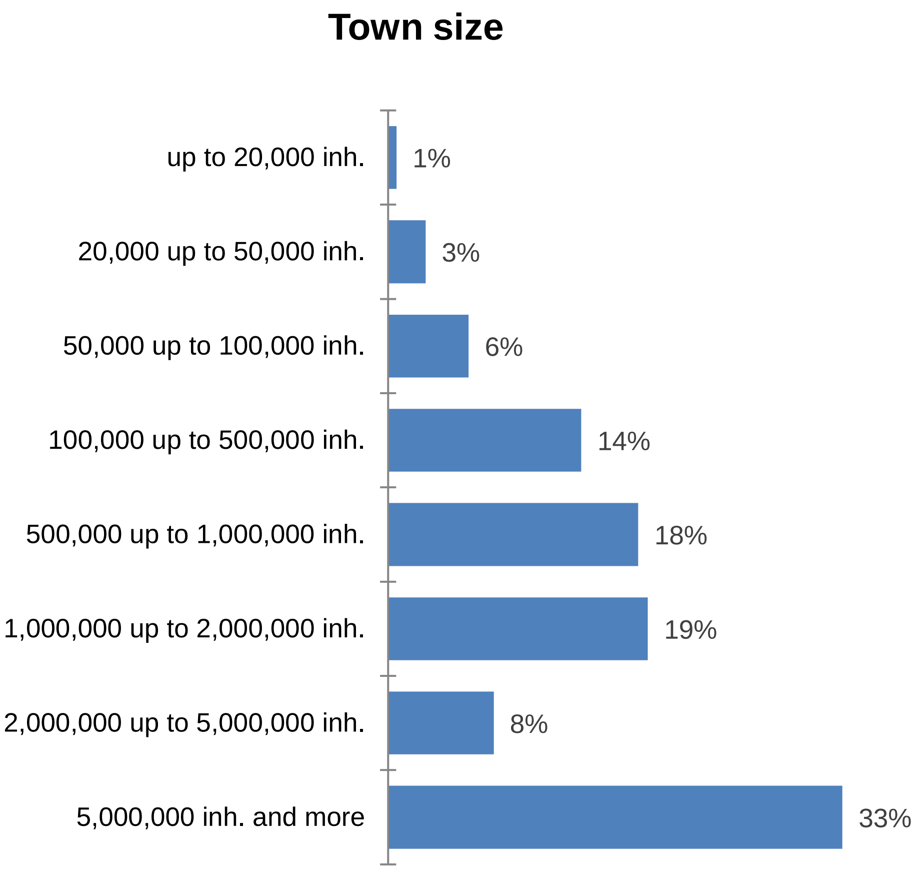
Source: inspektour (international) GmbH, 2025

3. Description of the respondents

Base: All respondents (n = 1,000)





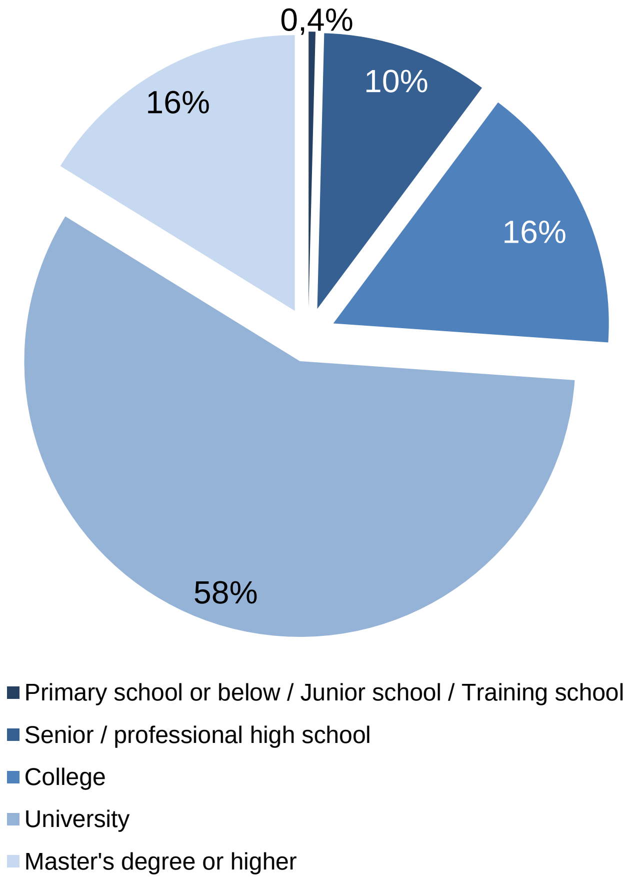


Source: inspektour (international) GmbH, 2025

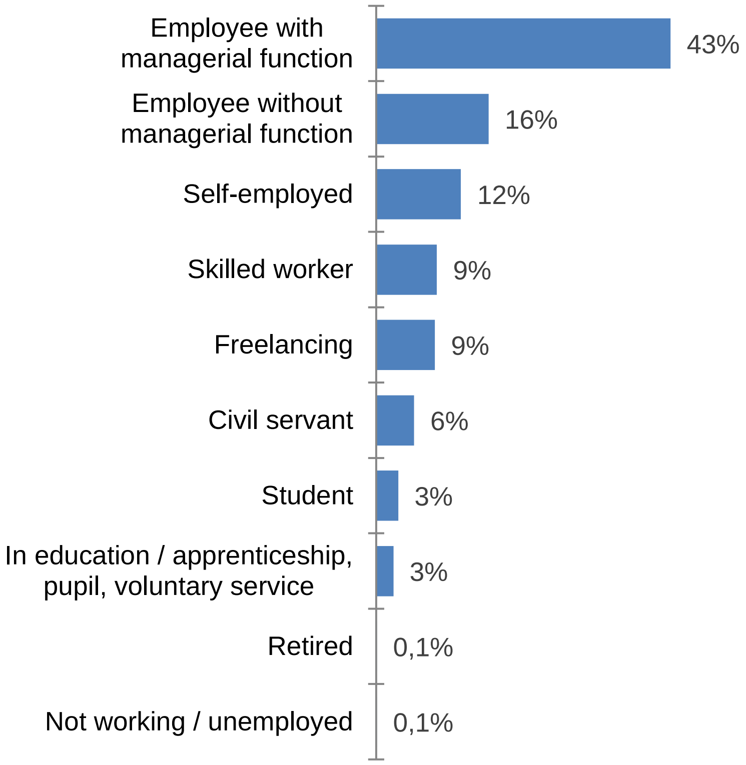
3. Description of the respondents

Base: All respondents (n = 1,000)

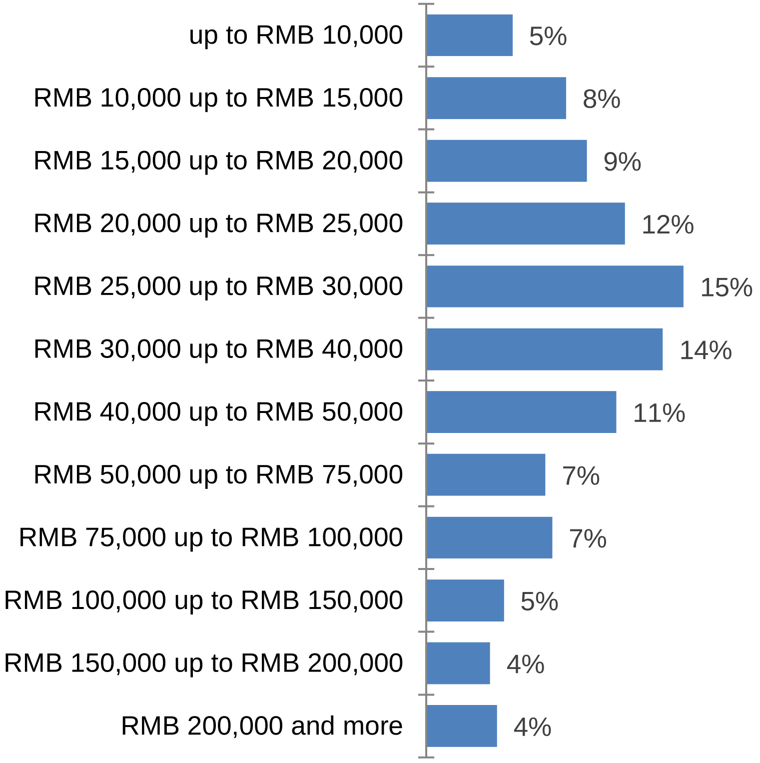
Formal education



Professional occupation



Net household income

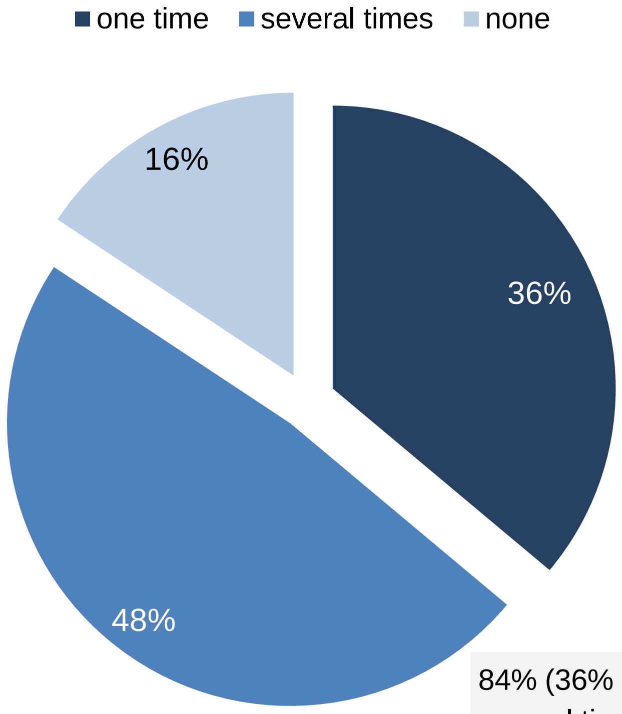


Source: inspektour (international) GmbH, 2025

3. Description of the respondents

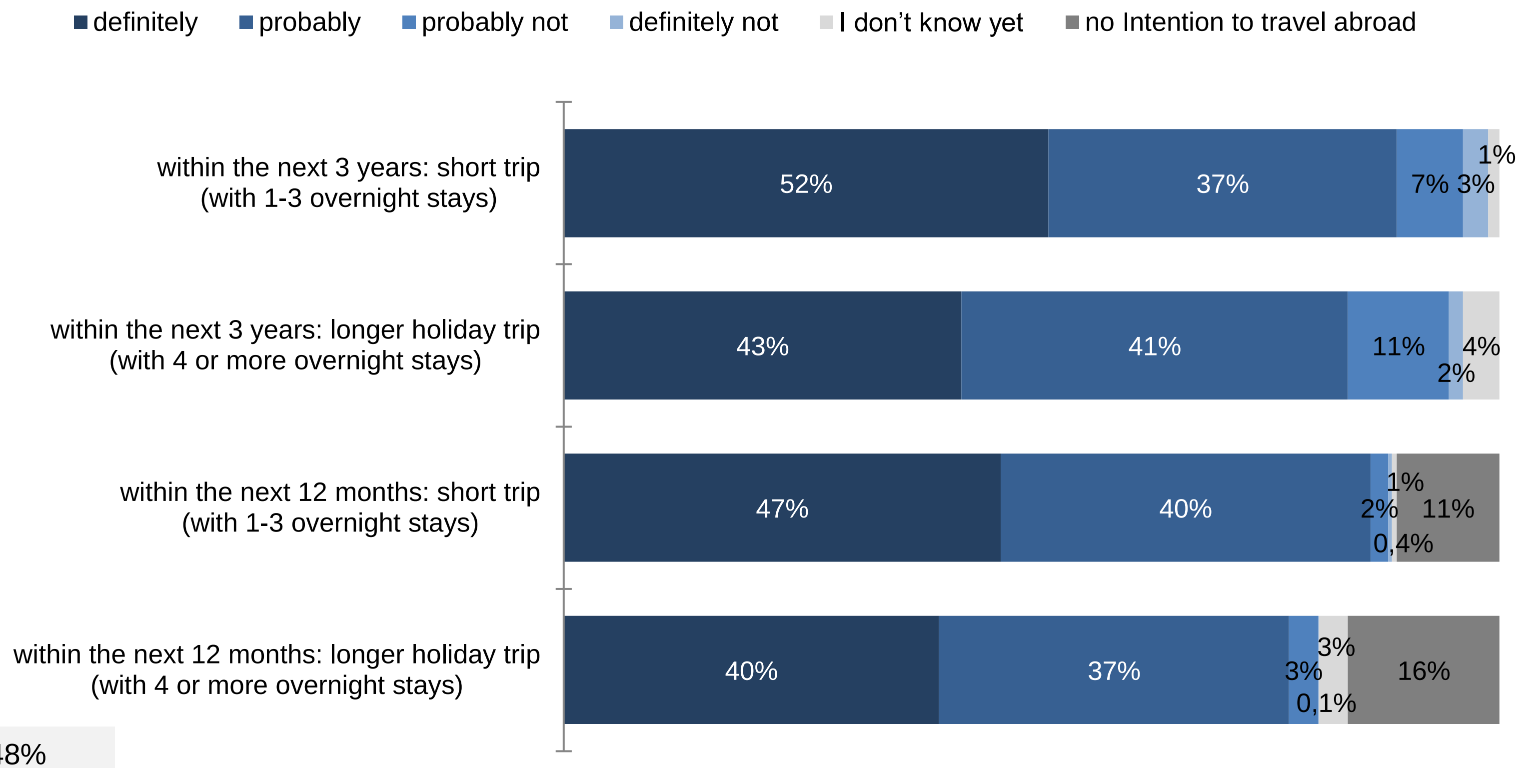
Base: All respondents (n = 1,000)

International travels within the last 3 years



84% (36% one time + 48% several times) of respondents have travelled abroad at least once in the last 3 years.

Intention to travel abroad



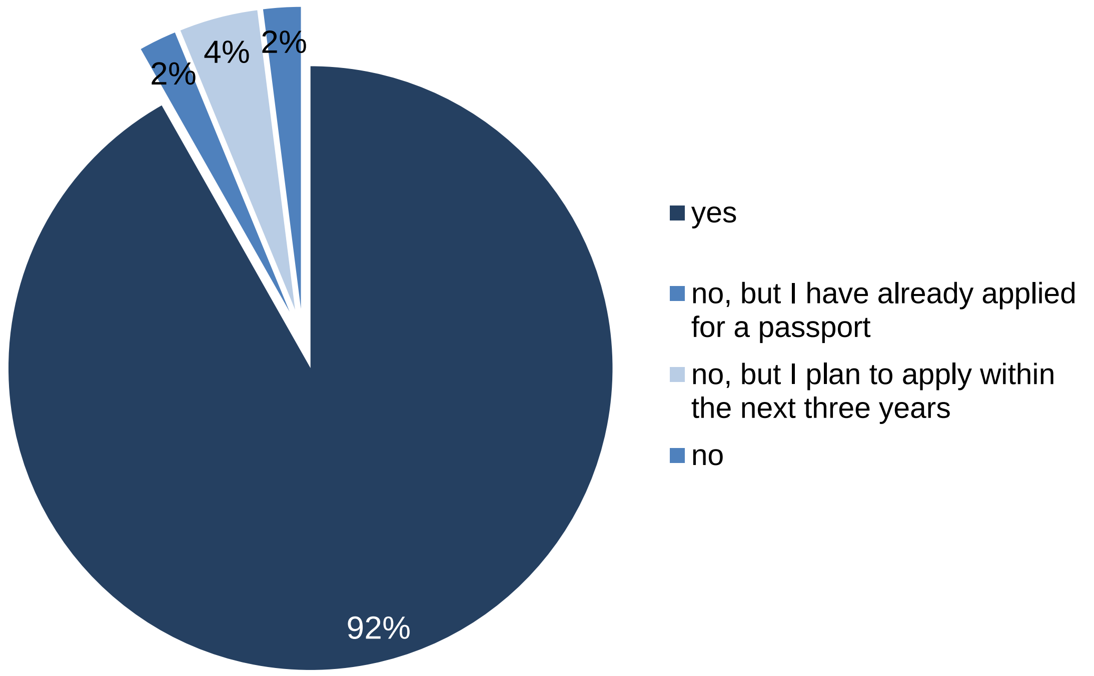
High intention to travel abroad for short and long holidays for both periods.

Source: inspektour (international) GmbH, 2025

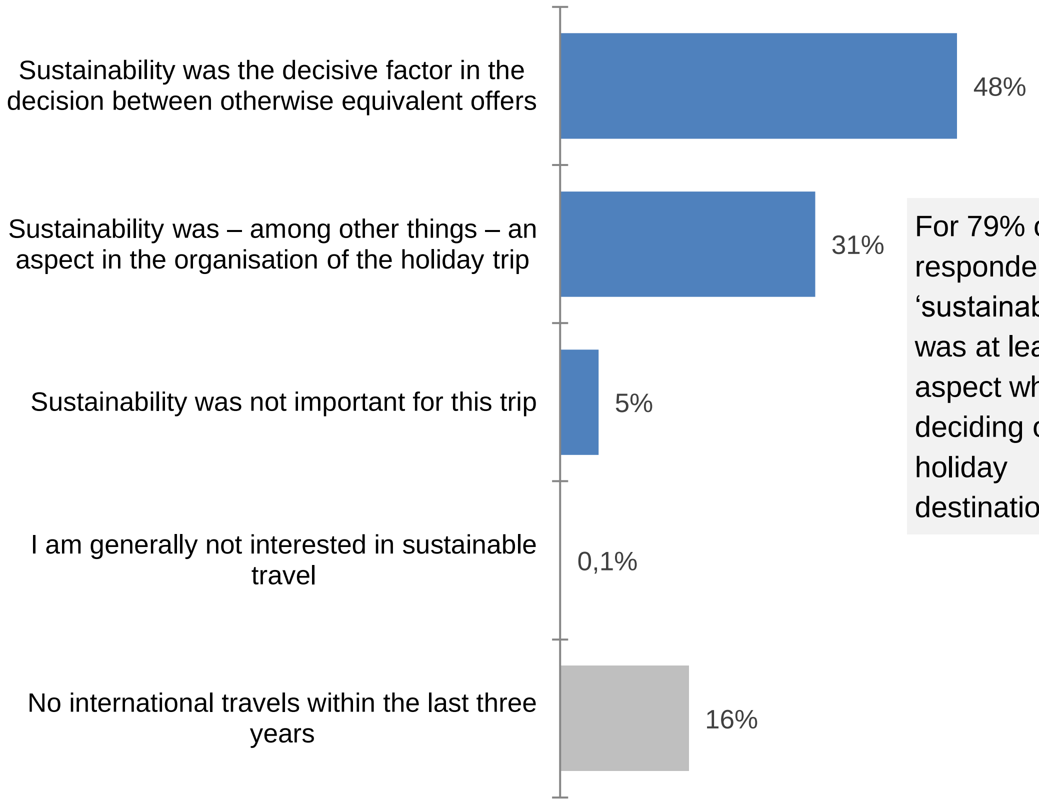
3. Description of the respondents

Base: All respondents (n = 1,000)

Do you have a valid passport?



Sustainability of last holiday abroad within the last 3 years



For 79% of the respondents, ‘sustainability’ was at least one aspect when deciding on a holiday destination.

Source: inspektour (international) GmbH, 2025

3. Description of the respondents

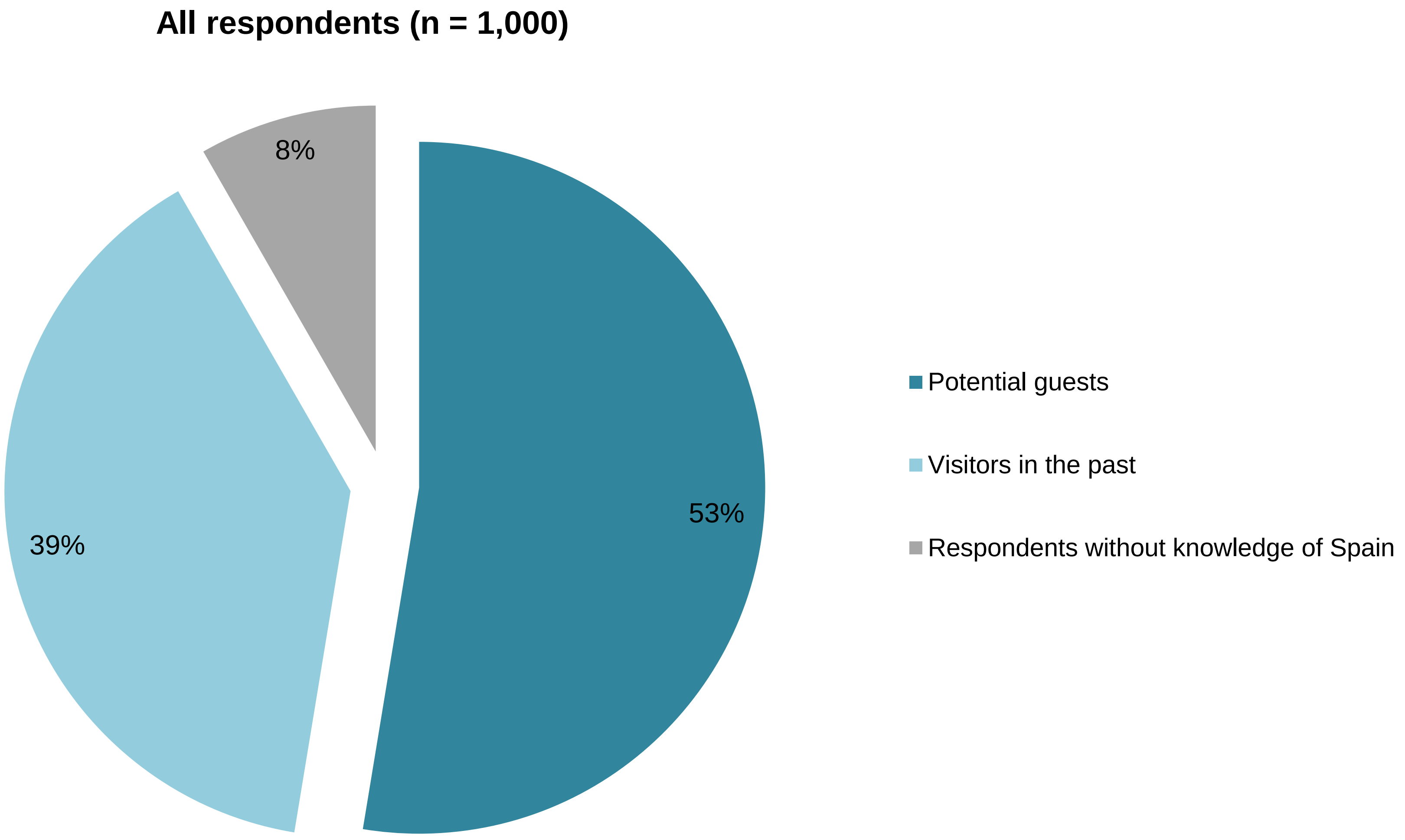
Base: All respondents (n = 1,000)

All respondents:
Refers to the total number of respondents (n = 1,000). Among them exclusively those were asked to assess Spain who know the tourist destination Spain at least by name

Potential guests:
Respondents who are familiar with the destination (even if only by name) but who have not yet spent a holiday with at least one overnight stay there

Visitors in the past:
Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

Respondents without knowledge of Spain:
Respondents who are not familiar with the destination Spain



Source: inspektour (international) GmbH, 2025

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3. Unsupported nomination of tourist destinations (top of mind)

Note: This blue box contains the question from the questionnaire

Which tourist destinations abroad would you like to visit next for a holiday (i.e. with at least one overnight stay)? (max. 3 responses)

Note: This blue box contains the key methodological data

Source market: China
Number of respondents: 988
Number of responses: 1,193
Base: All respondents with valid responses

	Unsupported nomination of tourist destinations: Top 10 destinations	% of respondents*	% of responses	number of responses
1	Japan	12,3%	10,2%	122
2	Singapore	11,2%	9,3%	111
3	**Spain**	**6,8%**	**5,6%**	**67**
4	Thailand	6,4%	5,3%	63
5	USA	6,0%	4,9%	59
6	France	5,4%	4,4%	53
7	Australia	5,1%	4,2%	50
8	United Kingdom	4,7%	3,9%	46
9	Paris	4,0%	3,4%	40
10	Korea	3,7%	3,1%	37
10	New Zealand	3,7%	3,1%	37

With 67 mentions, Spain ranks third behind Japan and Singapore as the destination that Chinese respondents would like to visit next. 3rd place in the overall ranking and 1st place among European destinations.

A total of 988 respondents answered this top-of-mind question (question with no specified answers). Each respondent could give a maximum of 3 answers. A total of 1,193 mentions (answers) were submitted.

Note: Spain is already firmly established as a holiday destination in the minds of the Chinese respondents.

► Note: Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

* Multiple answers possible.

Source: inspektour (international) GmbH, 2025

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69% of the respondents are generally interested or very interested in ‘sustainable holidays’, regardless of a destination: Among the 20 holiday activities selected by TourSpain, ‘Sustainable holidays’ ranked in the middle. The Chinese respondents are most interested in “Enjoying culinary / gastronomic specialities”, “Enjoying nature” and “Visiting castles, mansions, parks and gardens”

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4. General interest in holiday activities

Ranking of the considered holiday activities with regard to the general interest potential (mean = 68%)
Source market: China
Base: All respondents | Number of respondents: 1,000
Top-two-box on a scale from “5 = very interested” to “1 = not at all interested”

		% of resp.			% of resp.
1	Enjoying culinary / gastronomic specialities	78%	11	Spending holidays in the countryside (e.g., on the farm or vineyard)	69%
1	Enjoying nature	78%	12	Visiting UNESCO world heritage sites	68%
3	Visiting castles, mansions, parks and gardens	77%	13	Attending events	68%
4	Relaxing and resting	76%	14	Experiencing lively places (e.g., trendy shopping districts, festivals, alternative cultural circles, night life)	67%
5	Enjoying the (small) city flair / atmosphere	74%	15	Using wellness services	66%
6	Visiting museums / exhibitions / art museums	70%	16	Using luxury offers	64%
7	Visiting cultural institutions / using cultural services	70%	17	Visiting film locations	61%
8	Shopping	70%	18	Hiking	59%
9	**Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)**	**69%**	19	Being active and involved in sports	59%
10	Taking a city break	69%	20	Cycling (not mountain biking)	56%

Note: Integrate the top 5 holiday activities into marketing as a sustainable destination

Source: inspektour (international) GmbH, 2025

4. General interest in holiday activities (1/2)

In addition to the previous slide, it should be noted here that with regard to all 20 selected holiday activities, few Chinese stated that they were 'not at all interested' in the activities.

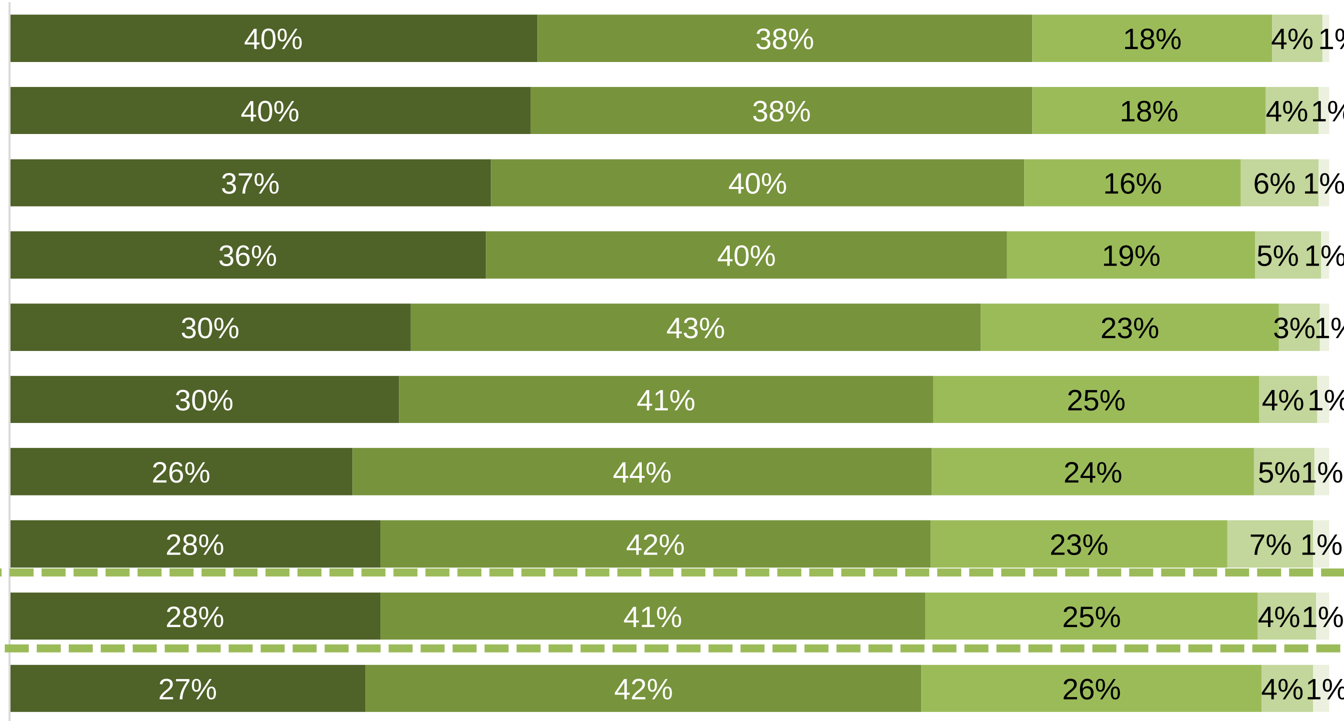
General interest in holiday activities

> How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

> Values (in % of respondents)

Source market: China
Base: All respondents
Number of respondents: 1,000

Note on the bar chart: The colour gradation of the bars makes it clear at which scale point the respondents answered



	5 = very interested	4	3	2	1 = not at all interested	Top Two Box*
Enjoying culinary / gastronomic specialities	40%	38%	18%	4%	1%	78%
Enjoying nature	40%	38%	18%	4%	1%	78%
Visiting castles, mansions, parks and gardens	37%	40%	16%	6%	1%	77%
Relaxing and resting	36%	40%	19%	5%	1%	76%
Enjoying the (small) city flair / atmosphere	30%	43%	23%	3%	1%	74%
Visiting museums / exhibitions / art museums	30%	41%	25%	4%	1%	70%
Visiting cultural institutions / using cultural services	26%	44%	24%	5%	1%	70%
Shopping	28%	42%	23%	7%	1%	70%
Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)	28%	41%	25%	4%	1%	69%
Taking a city break	27%	42%	26%	4%	1%	69%

Source: inspektour (international) GmbH, 2025

** Deviations of 1% from the sum of the individual values are possible due to rounding.*

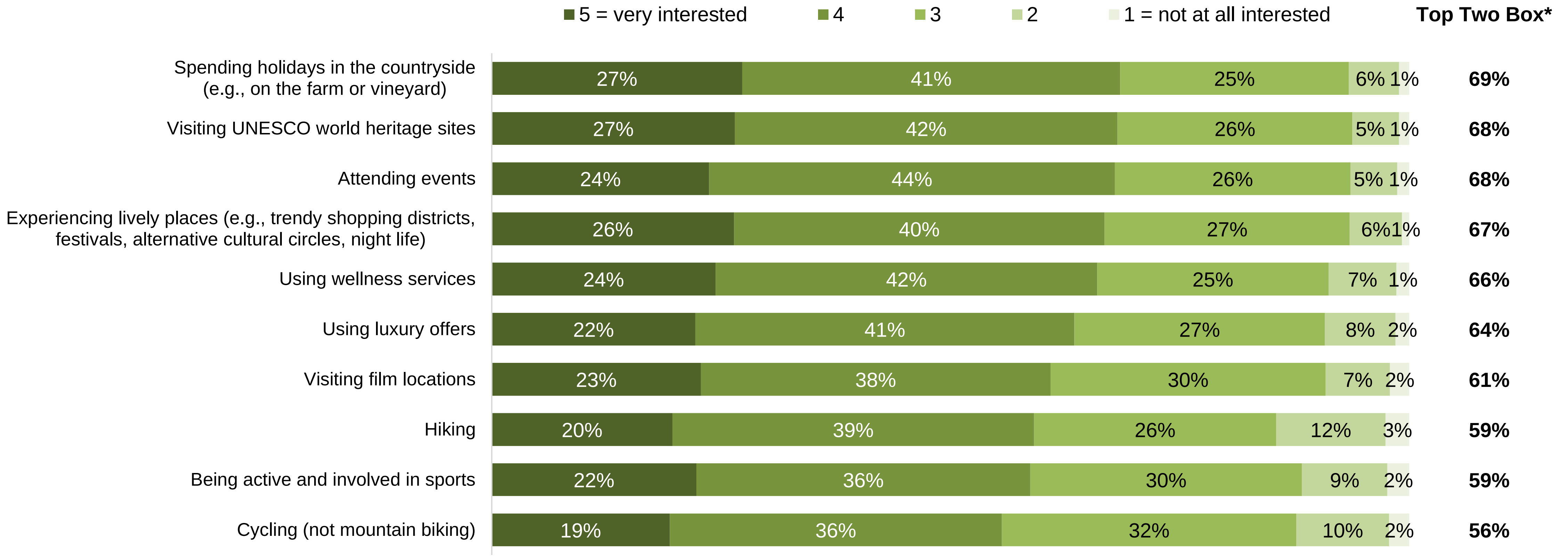
4. General interest in holiday activities (2/2)

General interest in holiday activities

> How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

> Values (in % of respondents)

Source market: China
Base: All respondents
Number of respondents: 1,000



Source: inspektour (international) GmbH, 2025

** Deviations of 1% from the sum of the individual values are possible due to rounding.*

4. General interest in holiday activities

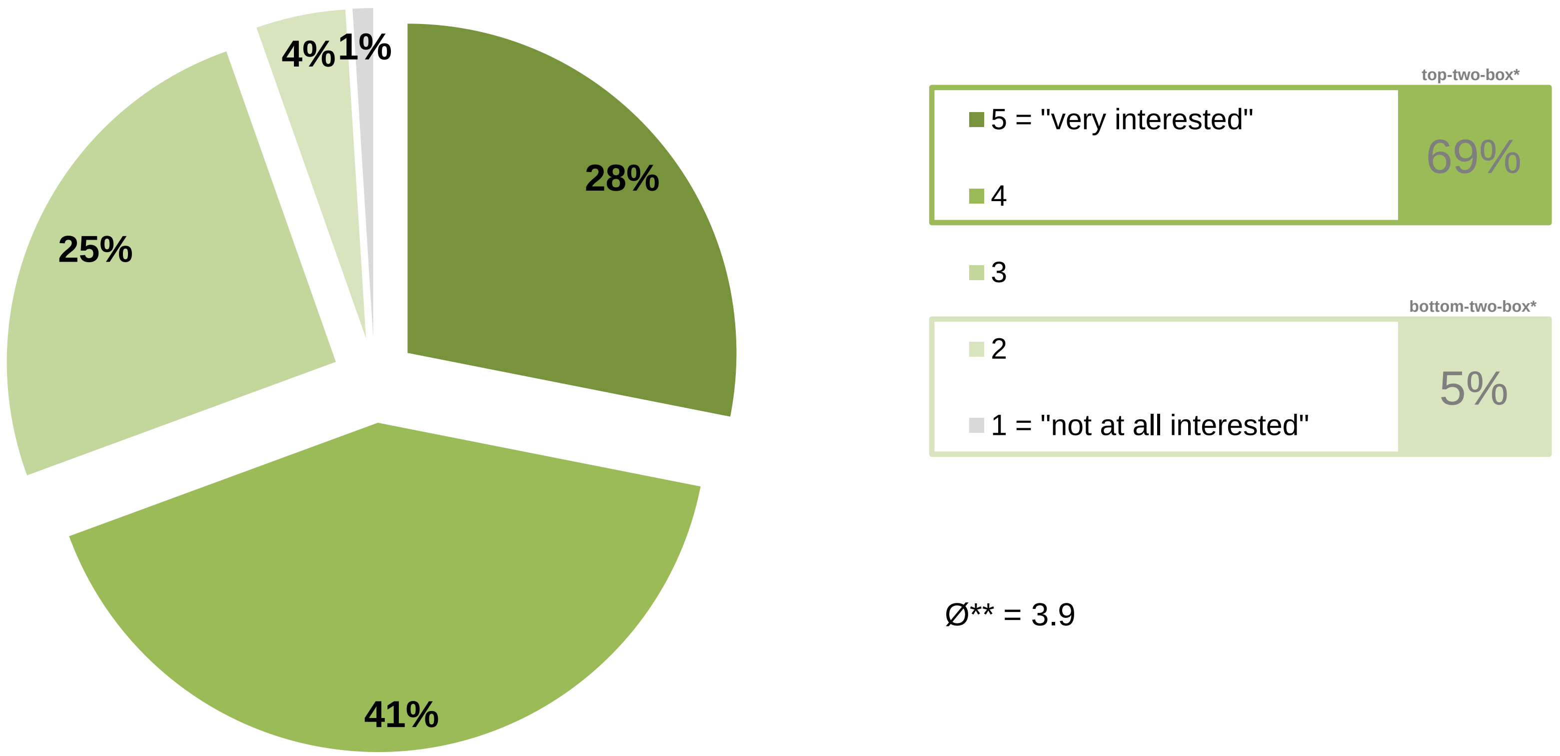
General interest: “Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)”

> How interested are you in pursuing the following touristic holiday activities as part of your holiday trip with at least one overnight stay?

> Values (in % of respondents)

Source market: China
Base: All respondents
Number of respondents: 1,000

In addition to slides 19 and 20, this illustration also makes it clear that only a few Chinese (5%) are less interested or not at all interested in the topic of “Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)”



Ø** = 3.9

Source: inspektour (international) GmbH, 2025

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from “5 = very interested” to “1 = not at all interested”

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At least two-thirds of the respondents agree or fully agree with 13 of the 14 aspects. Top 1 is the preference for regional culinary products - this goes hand in hand with the general interest in "culinary / gastronomic specialities" (see page 18). It is also clear here that sustainable aspects are important when deciding on a holiday destination (see also page 13)

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5. Agreement with sustainability statements

Ranking of the considered sustainability statements (mean = 72%)
Source market: China
Base: All respondents | Number of respondents: 1,000
Top-two-box on a scale from "5 = I fully agree" to "1 = I do not agree at all"

		% of resp.
1	On holidays I prefer to eat regional culinary products.	82%
2	When choosing my destination, environmental aspects such as the expectation of good air, clean water, intact nature, etc. play an important role for me.	80%
3	On holidays it is important for me to get in touch with the local culture (e.g., get in contact with locals, try regional cuisine).	75%
4	At the resort, I pay attention to travel as environmentally friendly as possible (e.g., use of public transport, bicycles, electric cars).	74%
5	I appreciate a hotel's or other tourism provider's contribution towards environmental and nature protection (e.g., use of regional products or renewable energy sources).	74%
6	It has a positive effect on my willingness to visit, if I know that a destination demonstrates active and certified environmental efforts.	74%
7	When choosing the mode of transport for the journey, I pay attention to my environmental footprint (e.g., travelling by train instead of car or plane).	72%
8	If I realise in my holidays that employees in my accommodation are not treated fairly (e.g., poor payment), this will have a negative effect on my willingness to return.	72%
9	For an accommodation provider that demonstrates efforts towards environmental protection (e.g., eco-label), I am willing to pay a bit more.	71%
10	If I learn that residents of a destination complain about excessive tourism, I avoid visiting to ensure a more welcoming atmosphere and a better travel experience.	71%
11	I feel particularly well in my holidays when there are many people around me.	70%
12	I support requests to assist environmental and nature protection by hotels or other tourism providers (e.g., multiple use of towels).	70%
13	Certain holiday experiences (e.g., in the area of choice of transport or in the use of resources) have changed my behaviour in everyday life permanently before.	66%
14	During my holidays, I don't like to compromise on my consumption of resources (e.g., energy or water).	60%

Source: inspektour (international) GmbH, 2025

The bar chart shows that, in general, only a few respondents do not agree at all or agree less with the aspects listed (between 2% and 7% for each item).

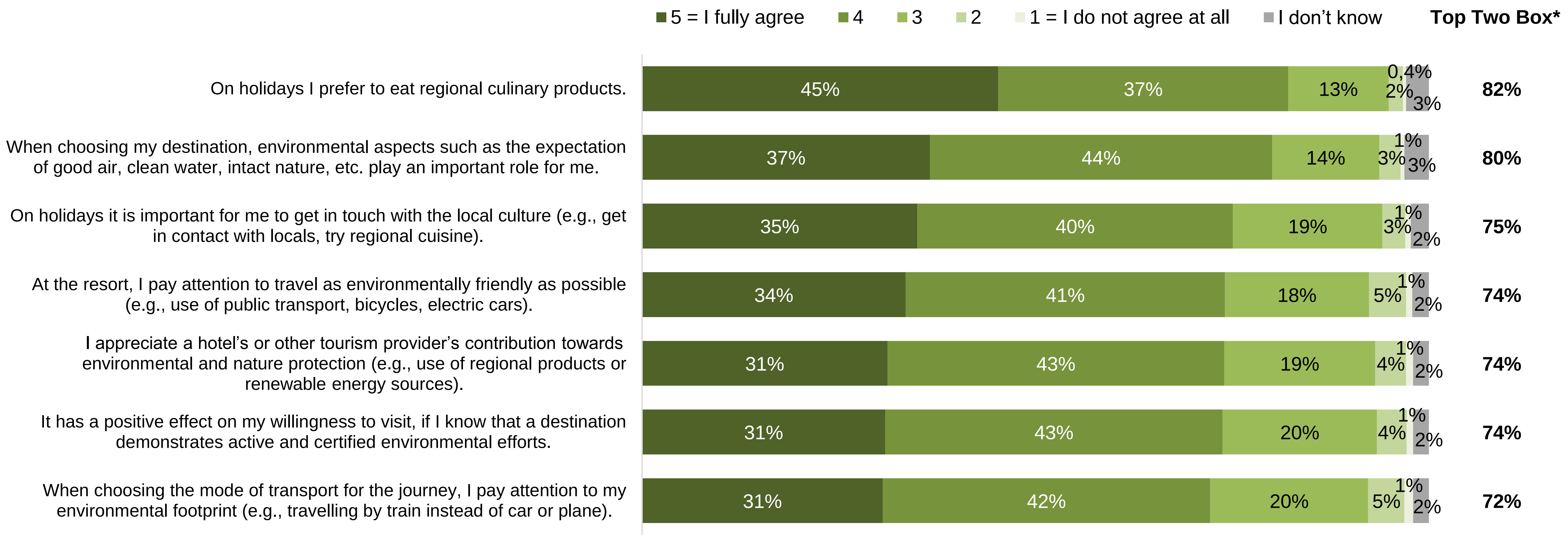
5. Agreement with sustainability statements (1/2)

Agreement with sustainability statements

> The following question is about your attitude towards selected aspects that can play a role on how you plan and carry out your holiday trips. To what extent do you agree with the following statements?

> Values (in % of respondents)

Source market: China
Base: All respondents
Number of respondents: 1,000



Source: inspektour (international) GmbH, 2025

** Deviations of 1% from the sum of the individual values are possible due to rounding.*

5. Agreement with sustainability statements (2/2)

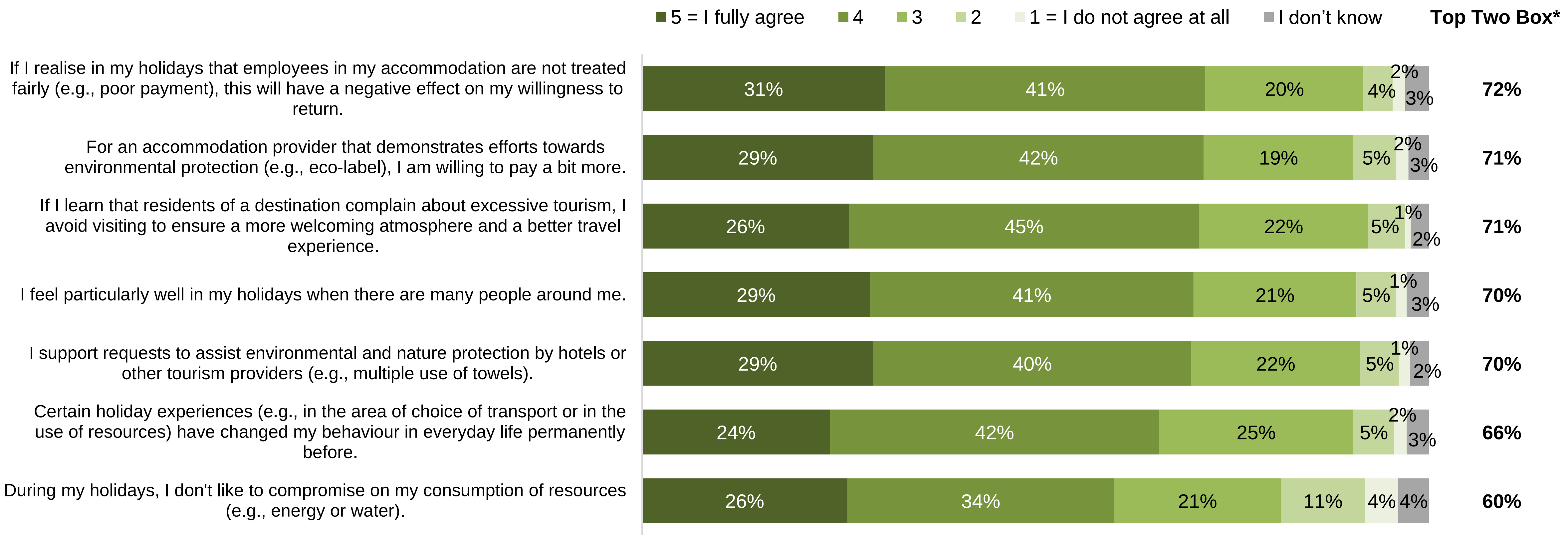
The lowest value is ‘During my holidays, I don't like to compromise on my consumption of resources (e.g., energy or water)’ with 60%, which conversely emphasises the importance of the aspect of sustainability.

Agreement with sustainability statements

> The following question is about your attitude towards selected aspects that can play a role on how you plan and carry out your holiday trips. To what extent do you agree with the following statements?

> Values (in % of respondents)

Source market: China
Base: All respondents
Number of respondents: 1,000



Source: inspektour (international) GmbH, 2025

** Deviations of 1% from the sum of the individual values are possible due to rounding.*

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6. General preference to organise own holiday trips

When asked about the 'organisation of the trip', the top 1 wish is 'quality at a fair price'. In addition, 65% of the respondents also stated that they prefer to book their holiday themselves. 54% confirmed that they prefer a 'partly' organised holiday where at least travel and accommodation are booked.

And here too, ecological and social aspects are among the top 3 in the overall ranking

Ranking of the considered preferences to organise own holiday trips (mean = 61%)
Source market: China
Base: All respondents | Number of respondents: 1,000
Top-two-box on a scale from "5 = completely applicable" to "1 = not at all applicable"

		% of resp.
1	On my holiday, I want good quality at a fair price.	76%
2	My holiday should be as ecologically compatible, resource-saving and environmentally friendly as possible.	70%
2	My holiday should be as socially acceptable as possible (i.e., I care that staff has good working conditions and that the local population is respected).	70%
4	I prefer to organise my holiday completely on my own (apart from buying tickets and booking my accommodation) so that I can be independent and organise my holiday as individually as possible.	65%
5	I want my holiday to be as inexpensive as possible.	62%
6	I prefer to have a really luxurious holiday, which can also cost money.	56%
7	I prefer to book a (more or less) organised trip, where travel and accommodation are organised and offered in a package at a fixed price.	54%
8	I would like to continue holidaying in the same way as before, but I don't know whether I can still afford it.	49%
9	When I go on holiday, I'm often annoyed by prices that are too high.	45%

Tip: Develop travel packages with basic accommodation and flights at a fair price and include social aspects as well as sustainability in the communication

Source: inspektour (international) GmbH, 2025

6. General preference to organise own holiday trips

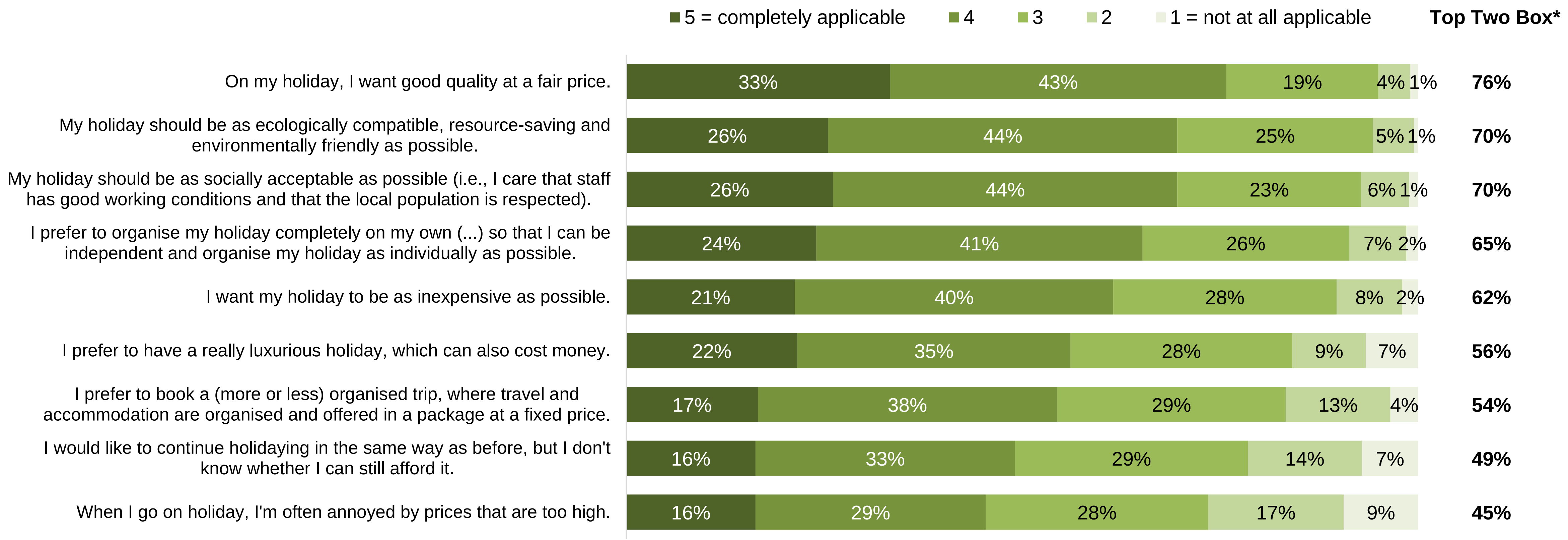
The additional detailed representation in the bar chart makes it clear that ‘Quality at a fair price’ is ‘completely applicable’ for one-third of the respondents (value 5 on the 5-point scale)

General preference to organise own holiday trips

> If you think about holiday trips in general, i.e. independent of a specific tourist destination: How do you prefer to organise your holiday trips?

> Values (in % of respondents)

Source market: China
Base: All respondents
Number of respondents: 1,000



Source: inspektour (international) GmbH, 2025

** Deviations of 1% from the sum of the individual values are possible due to rounding.*

Outline – Part I

1 STUDY DESIGN

2 DESCRIPTION OF THE RESPONDENTS

3 UNSUPPORTED NOMINATION OF TOURIST DESTINATIONS (TOP OF MIND)

4 GENERAL INTEREST IN HOLIDAY ACTIVITIES

5 AGREEMENT WITH SUSTAINABILITY STATEMENTS

6 GENERAL PREFERENCE TO ORGANISE OWN HOLIDAY TRIPS

7 SUPPORTED THEME SUITABILITY

8 SUPPORTED RATING OF ASPECTS

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TOURISM AND MARKET RESEARCH

7. Supported theme suitability

Spain is particularly considered suitable and very suitable for “Enjoying the (small) city flair / atmosphere”, “Enjoying culinary / gastronomic specialities“ and “Enjoying nature” (74% in each case). And with significantly higher top values (see dark red colouring in the bar) compared to the other 7 holiday activities. Almost 70% of the respondents also stated that they consider Spain to be suitable or very suitable for a “sustainable holiday trip”.

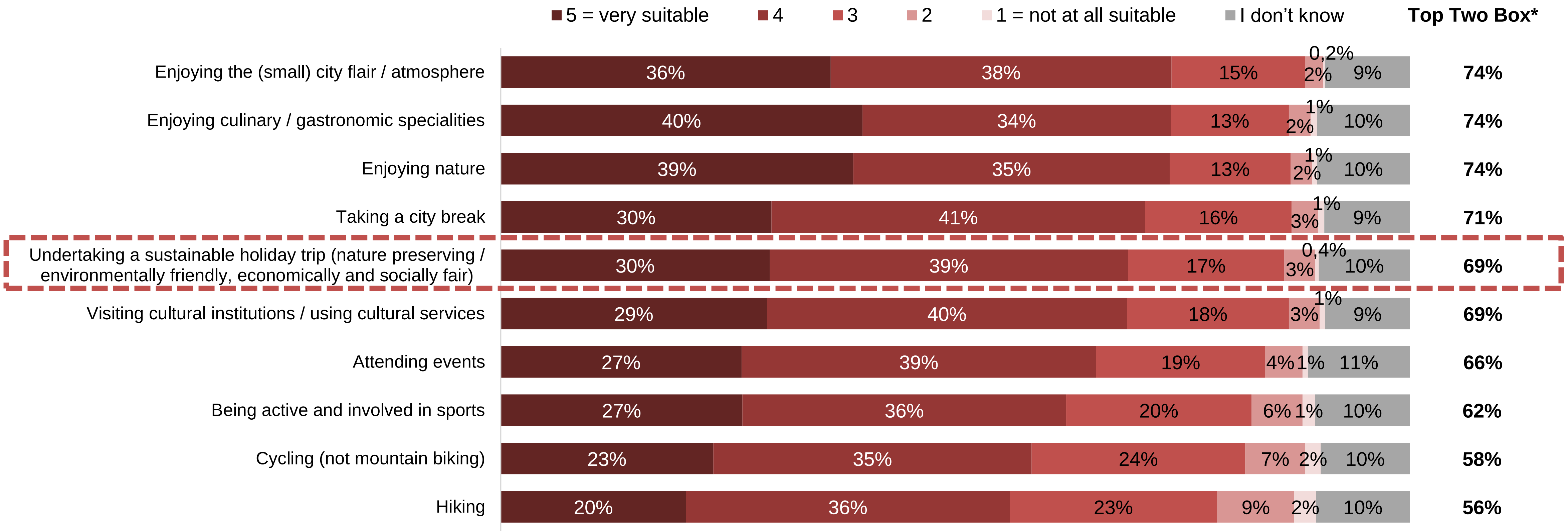
Supported theme suitability

> In your opinion, to what extent is the following international tourist destination Spain suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Values (in % of respondents)

Spain

Source market: China
Base: All respondents
Number of respondents: 1,000



Source: inspektour (international) GmbH, 2025

** Deviations of 1% from the sum of the individual values are possible due to rounding.*

7. Supported theme suitability

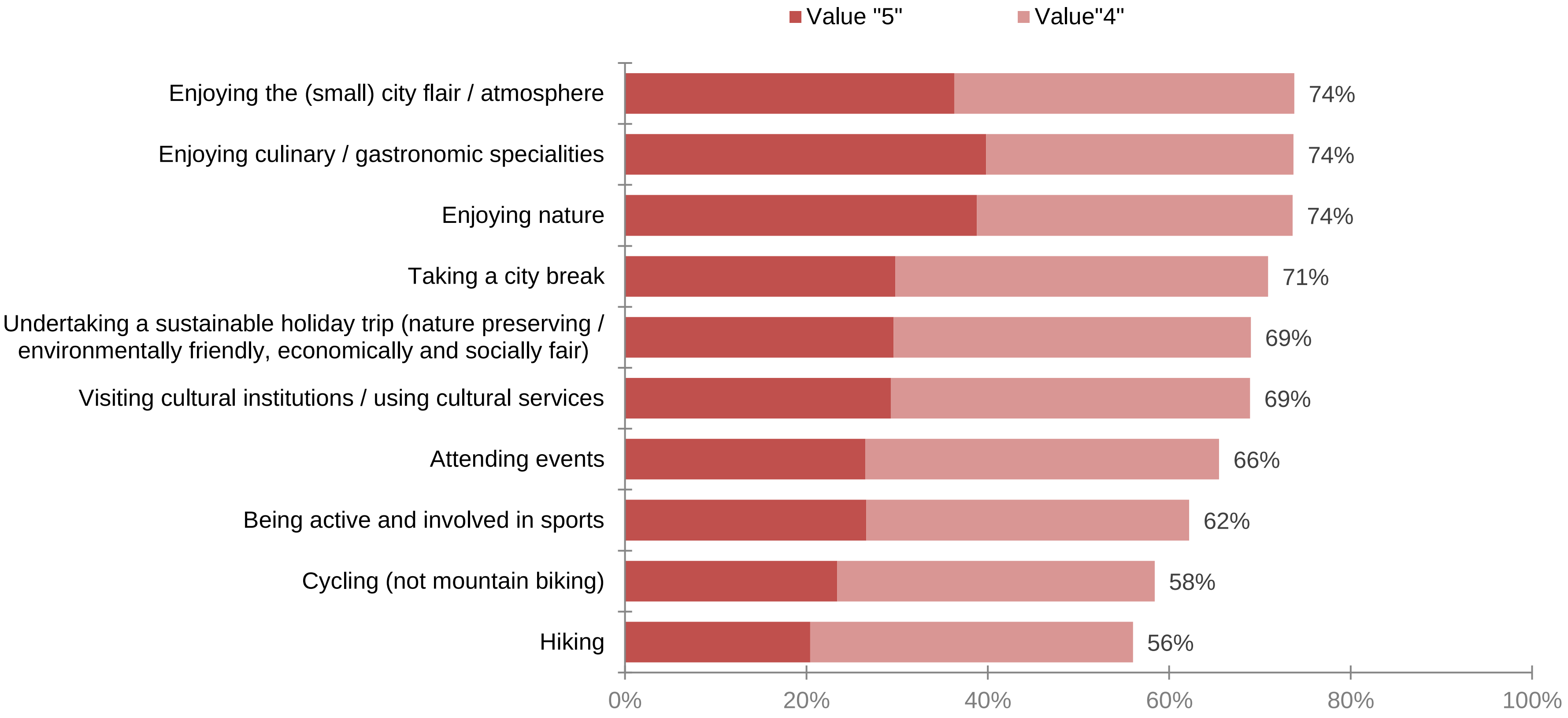
Supported theme suitability

> In your opinion, to what extent is the following international tourist destination Spain suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from "5 = very suitable" bis "1 = not at all suitable" (in % of respondents)

■ ***Spain***

Source market: China
Base: All respondents
Number of respondents: 1,000



Source: inspektour (international) GmbH, 2025

The results of the 'potential guests' subgroup confirm the results among 'all respondents', with slightly higher percentages in some cases. In the results for 'Visitors in the past', it should be emphasised that the approval ratings are again slightly to significantly higher across all holiday activities. And this is particularly true for 'sustainable holidays'. 84% of Chinese visitors to Spain confirm that Spain is suitable or very suitable for a sustainable holiday.

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TOURISM AND MARKET RESEARCH

7. Supported theme suitability

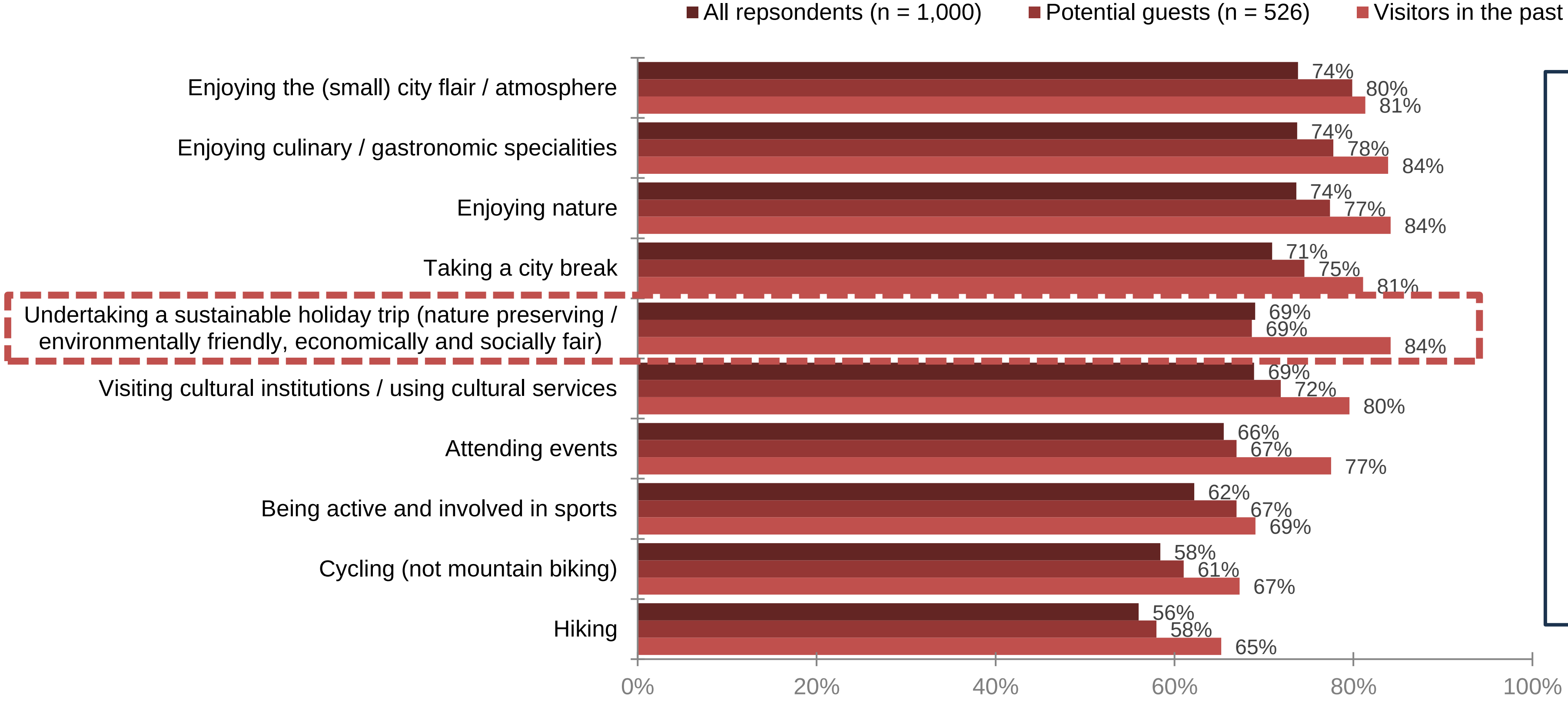
Supported theme suitability

> In your opinion, to what extent is the following international tourist destination Spain suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Top-two-box on a scale from "5 = very suitable" bis "1 = not at all suitable" (in % of respondents)

Spain

Source market: China
Base: All respondents
Number of respondents: varying



All respondents:
Refers to the total number of respondents (n = 1,000). Among them exclusively those were asked to assess Spain who know the tourist destination Spain at least by name

Potential guests:
Respondents who are familiar with the destination (even if only by name) but who have not yet spent a holiday with at least one overnight stay there

Visitors in the past:
Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

Source: inspektour (international) GmbH, 2025

7. Supported theme suitability

Supported theme suitability: "Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)"

> In your opinion, to what extent is the following international tourist destination Spain suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

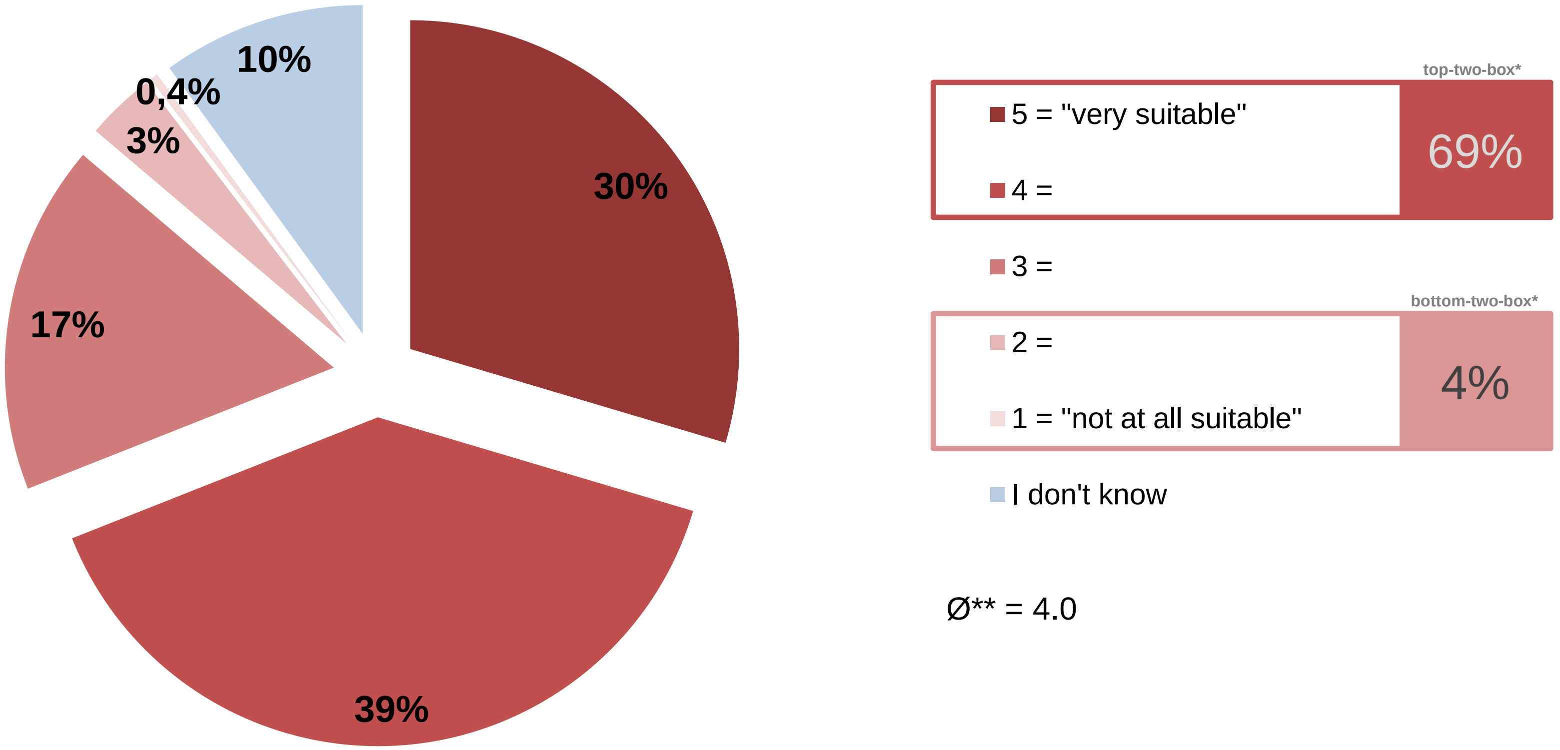
> Values (in % of respondents)

■ ***Spain***

Source market: China
Base: All respondents
Number of respondents: 1,000

In addition to the values on the previous slides, with a focus on the topic 'Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)', the values on the entire 5-point scale are shown here for 'all respondents' and on the following two slides for the subgroups 'Potential guests' and 'Visitors in the past'.

Only 4% stated that they consider Spain to be less suitable or unsuitable for this holiday theme - this applies to both subgroups.



Source: inspektour (international) GmbH, 2025

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

7. Supported theme suitability

Supported theme suitability: “Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)”

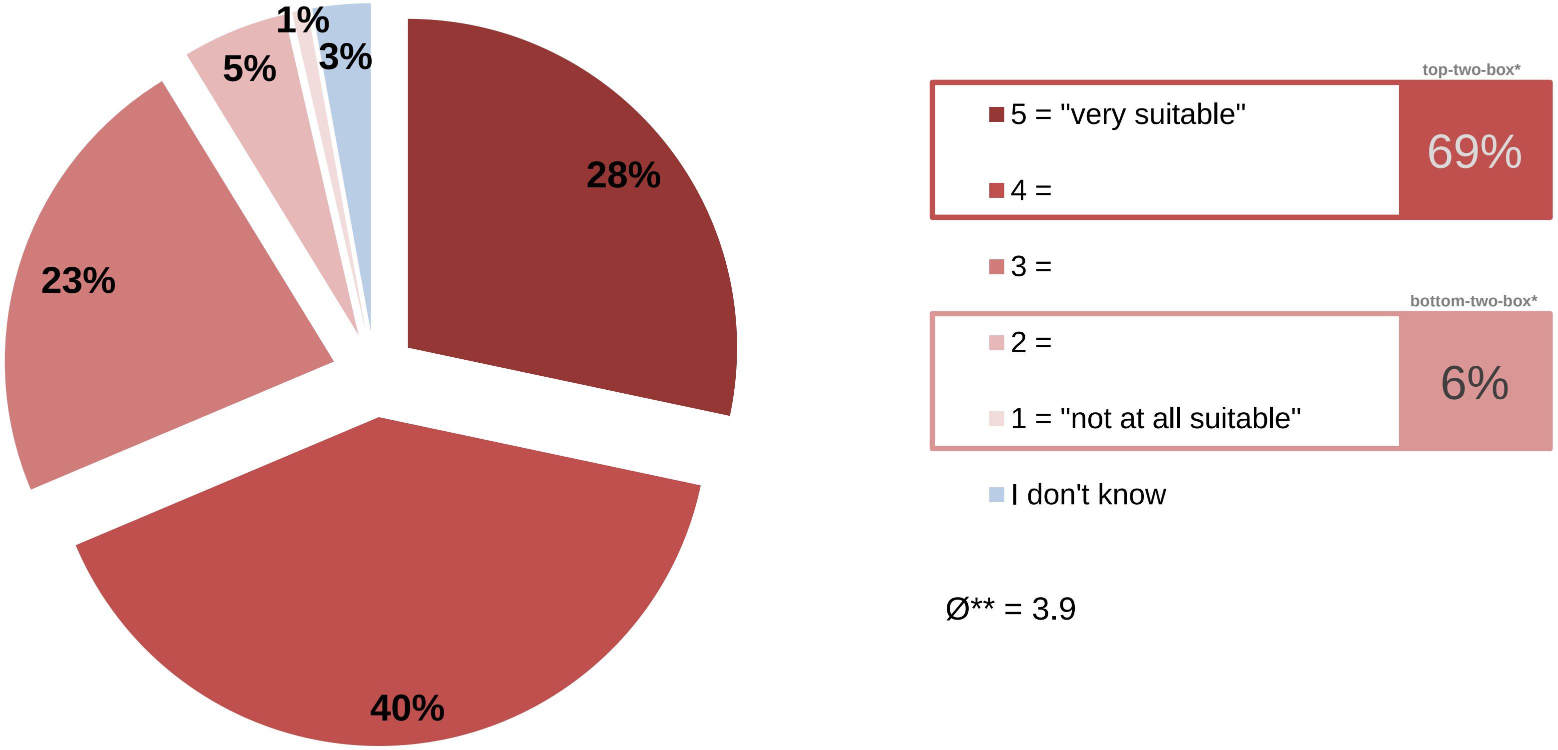
> In your opinion, to what extent is the following international tourist destination Spain suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Values (in % of respondents)

■ ***Spain***

Source market: China
Base: Potential guests
Number of respondents: 526

Potential guests:
Respondents who are familiar with the destination (even if only by name) but who have not yet spent a holiday with at least one overnight stay there



* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from “5 = very suitable” to “1 = not at all suitable”

Source: inspektour (international) GmbH, 2025

7. Supported theme suitability

Supported theme suitability: "Undertaking a sustainable holiday trip (nature preserving / environmentally friendly, economically and socially fair)"

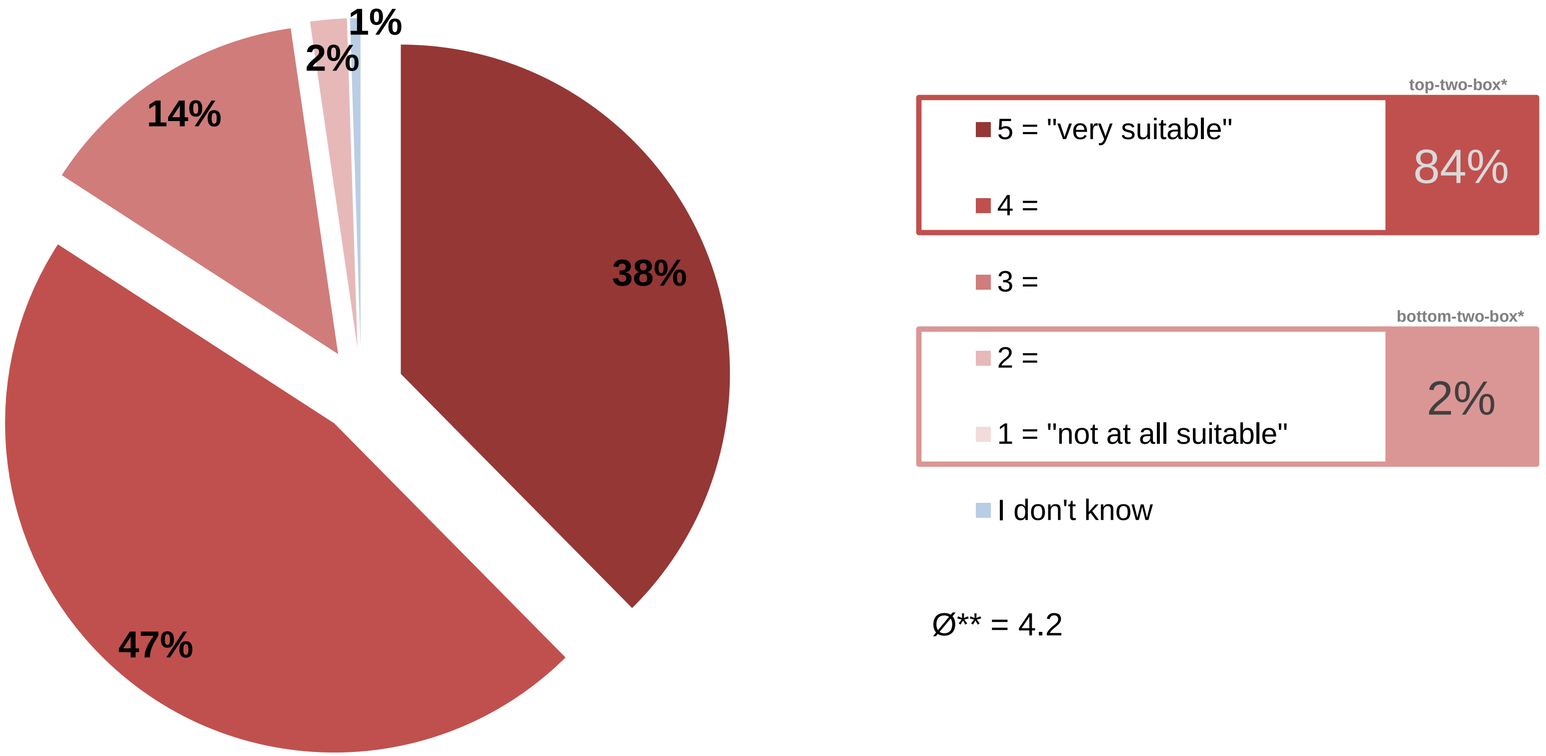
> In your opinion, to what extent is the following international tourist destination Spain suitable for the holiday activities below (regardless of your own interest in the holiday activities)?

> Values (in % of respondents)

Spain

Source market: China
Base: Visitors in the past
Number of respondents: 391

Visitors in the past:
Respondents who have already holidayed in the tourist destination (with at least one overnight stay)



Ø** = 4.2

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very suitable" to "1 = not at all suitable"

Source: inspektour (international) GmbH, 2025

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1 STUDY DESIGN

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At least 70% of the Chinese respondents rated all selected aspects relating to Spain as a holiday destination as good or very good. Nature in particular (84%) was rated positively, while public transport and value for money ranked in the last two places in the overall ranking - however, it should be noted that the values for all the items surveyed here are close to each other (between 71% and 84%) and over two-thirds of respondents also rated the last two items relating to Spain as good or very good.

8. Supported rating of aspects (1/2)

Supported rating of aspects

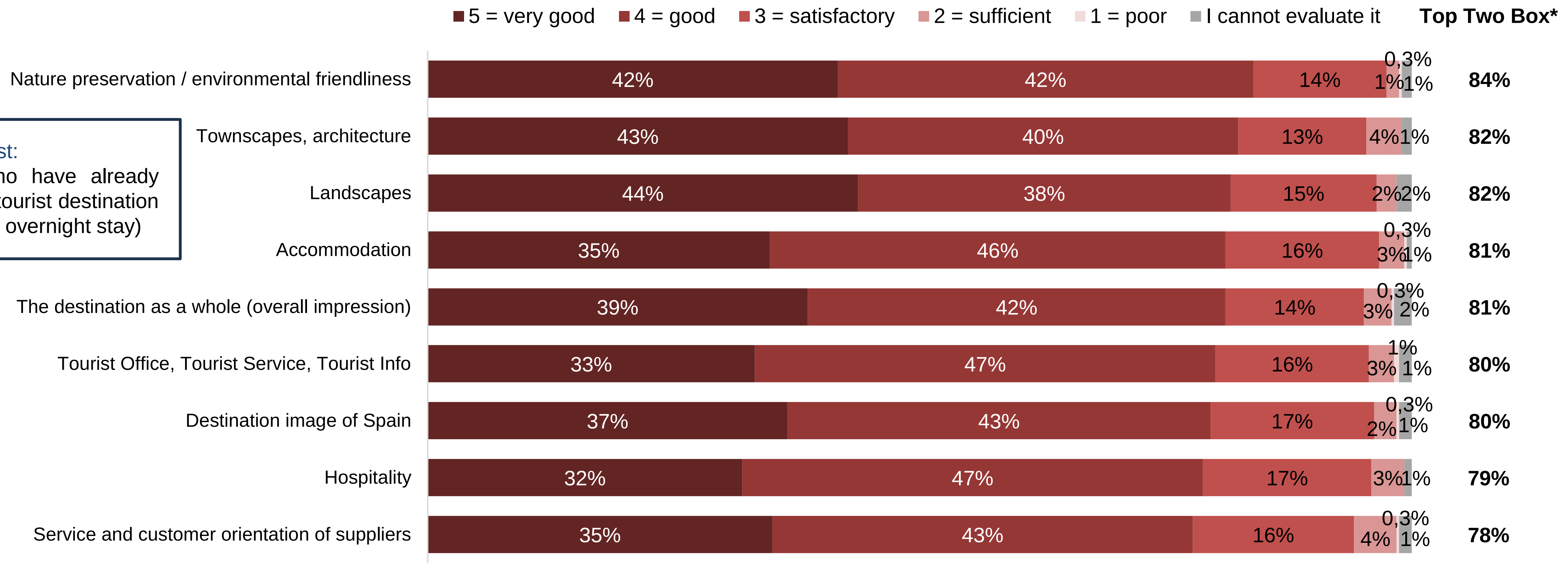
> How do you rate the following aspects for the tourist destination Spain?

> Only visitors in the past were asked this question. | Values (in % of respondents)

Spain

Source market: China
Base: Visitors in the past
Number of respondents: 391

Visitors in the past:
Respondents who have already holidayed in the tourist destination (with at least one overnight stay)



Source: inspektour (international) GmbH, 2025

** Deviations of 1% from the sum of the individual values are possible due to rounding.*

8. Supported rating of aspects (2/2)

Supported rating of aspects

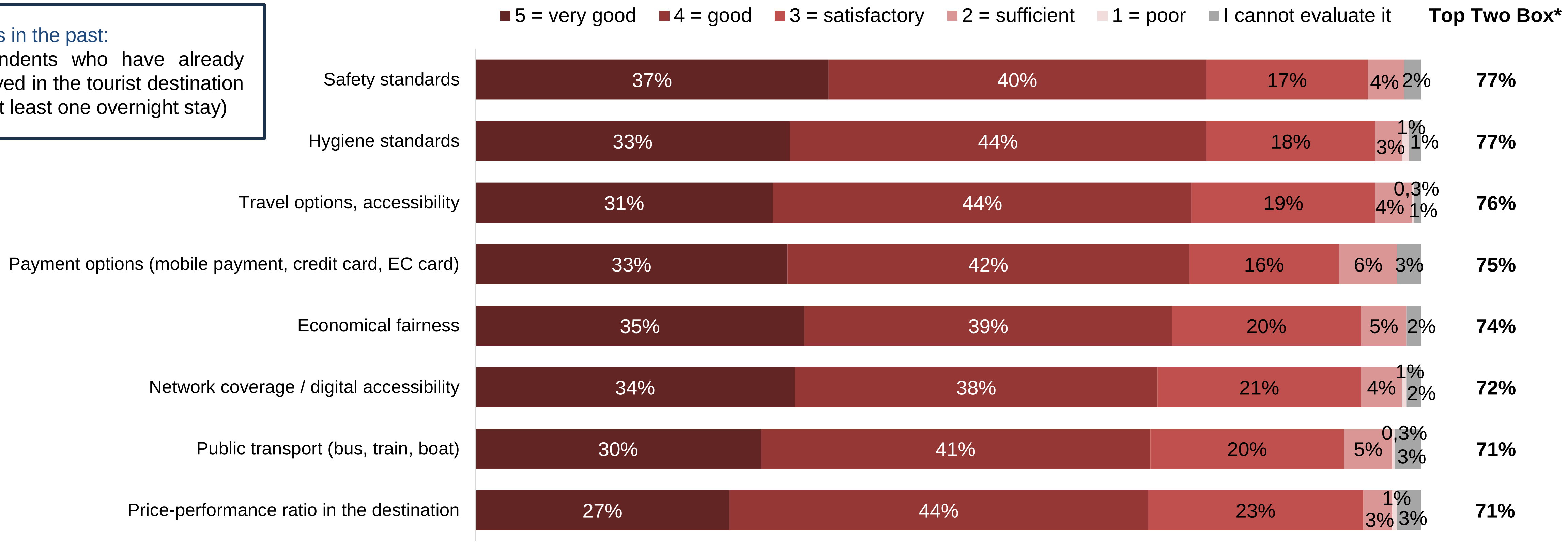
> How do you rate the following aspects for the tourist destination Spain?

> Only visitors in the past were asked this question. | Values (in % of respondents)

■ ***Spain***

Source market: China
Base: Visitors in the past
Number of respondents: 391

Visitors in the past:
Respondents who have already holidayed in the tourist destination (with at least one overnight stay)



Source: inspektour (international) GmbH, 2025

** Deviations of 1% from the sum of the individual values are possible due to rounding.*

Initial findings and conclusions :

- The aspect of sustainability plays a (significant) role for the Chinese respondents when deciding on a travel destination.
- Over two-thirds of the respondents intend to travel abroad both within the next 12 months and within the next 3 years.
- Spain is already firmly established as a holiday destination in the minds of those surveyed.
- There is also an interest in sustainable holidays - however, the highest general interest is in culinary, nature and visiting castles. Contact with the local culture is also important. A combination of these themes is a good way of designing offers and addressing target groups.
- Develop travel packages with basic accommodation and flights at a fair price and include social aspects as well as sustainability in the communication.
- Spain is considered particularly suitable for ‘small-town flair’, ‘culinary / gastronomic specialities’ and ‘nature’, but also for sustainable holidays. Over two-thirds of the respondents confirmed this perception for Spain.
- These results are confirmed by the subgroups ‘Potential guests’ and ‘Visitors in the past’. And: Visitors in the past in particular confirm with 84% that Spain is suitable or very suitable as a sustainable travel destination.
- In addition, ‘visitors in the past’ rate the following aspects in particular as good or very good for Spain as a holiday destination: Nature preservation, townscapes / architecture und landscapes.

PART II:

TOURIST DESTINATIONS AS TOURISM AND LIVING SPACES

SOURCE MARKET **CHINA**

DESTINATION BRAND 23

Extract for the tourist destination Spain (西班牙)

► **Note:** Queried designation of Spain for Chinese respondents = “西班牙”

Customer-oriented study on tourism and living spaces I total of 1,000 respondents I population representative study

Evaluation of offers and infrastructure elements as well as the quality of life and culture of welcoming of 10 tourist destinations

Outline – Part II

1 STUDY DESIGN

2 UNSUPPORTED NOMINATION OF TOURIST DESTINATIONS (TOP OF MIND)

3 GENERAL RELEVANCE OF TOURISTIC OFFERS AND INFRASTRUCTURE ELEMENTS

4 SUPPORTED EVALUATION OF OFFERS AND INFRASTRUCTURE

1. Study design: Methods of the tourism and living space study Destination Brand 23

Aim of research	– Customer-oriented study on the **image of tourist destinations as tourism and living spaces** in the **source markets:** – Germany (DE), Austria (AT), Switzerland (CH), Netherlands (NL), France (FR), Italy (IT), Spain (ES), United Kingdom (UK), USA (US), China (CN)

Research focus

Module 1: Offers & infrastructure

- **General** (i.e., independent of a specific destination) **relevance** of touristic offers and infrastructure elements when choosing a tourist destination
- **Supported evaluation of offers and infrastructure** per destination
- Unsupported nomination of tourist destinations (top of mind)

Module 1 Digital: Digital offers and infrastructure elements (fixed set of 5)

- **General** (i.e. independent of a specific destination) **interest** in digital offers and infrastructure elements
- **Supported interest in digital offers and infrastructure elements** per destination
- Unsupported nomination of tourist destinations (top of mind)

Module 2: Quality of life & culture of welcoming

- **General** (i.e., independent of a specific destination) **relevance** of characteristics when choosing a tourist destination
- Part I **Quality of life**:
  - Supported evaluation of the **quality of life in general** per destination
  - Supported evaluation of **five additional characteristics regarding quality of life** per destination
- Part II **Culture of welcoming**:
  - Supported evaluation of the **impacts of tourism in general** per destination
  - Supported evaluation of **five additional characteristics regarding culture of welcoming** per destination
- Unsupported nomination of tourist destinations (top of mind)

Note: The data considered for Part II of this report is based on the results from Module 1

DESTINATION BRAND 23

1. Study design: Methods of the tourism and living space study Destination Brand 23

Research focus	**Module 1 + 2:**
	– **Competitor analysis** with all destinations surveyed per source market
	– **Sociodemographic differentiation** of the key results according to 8 different criteria
	– **Standard target group analysis** based on:
	  – sociodemographic criteria
	  – the general (i.e., regardless of a specific destination) interest in holiday activities
	  – the general (i.e., regardless of a specific destination) relevance of tour. offers / infrastructure elements when choosing a tourist destination
	– Source market Germany: Additional target group analyses (chargeable) according to:
	  – the “Sinus Milieus® Germany” and the “Sinus-Meta-Milieus®” by the SINUS-institute
	  – the “BeST types of holidaymakers” by the FH Westküste

Survey design	– **158** destinations (several destinations were surveyed in more than one source market); distribution among the source markets: DE = 148 | AT = 10 | CH = 10 | NL = 10 | CN = 10 | FR = 10 | IT = 10 | ES = 10 | UK = 10 | US = 10 – **Total sample size:** 24,000; per destination: 1,000 distribution among the source markets: DE 15,000 | all other source markets 1,000 each – **Online survey in the respective national language** (remark: CH = German & French) – **Quota sample** based on cross quota age / sex and regional origin – **Representative** of the respective population aged 14-74 years living in private households (deviation only in the source market China*): DE = 61.87 m | AT = 6.89 m | CH = 6.66 m | NL = 13.47 m | FR = 48.55 m | IT = 45.14 m | ES = 34.67 m | UK = 49.89 m | US = 246.50 m * Representative of the Ipsos panel members in China covering the following characteristics: Chinese-speaking urban population (including the top city categories “Tier 1-3” without Hongkong and Macau) aged 14-59 years with Internet access, which according to additional preceding filter questions shows an affinity to travel abroad.
Survey period	– **October / November 2023**

Ipsos

Outline – Part II

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2. Unsupported nomination of tourist destinations (top of mind) – *Top 10 destinations*

If you think of the touristic aspect or the touristic offer "high sustainability of tourist offerings (nature preserving / environmentally friendly, economically and socially fair)":

To which international tourist destinations (countries, cities, regions, etc.) is this aspect or offer particularly applicable in your opinion? (max. 3 responses)

■ ***high sustainability of tourist offerings***

Source market: China
Number of respondents: 804
Number of responses: 1,530
Base: All respondents with valid responses

Unsupported nomination of tourist destinations with reference to "high sustainability of tourist offerings": Top 10 destinations		% of respondents*	% of responses	number of responses
1	Switzerland	20.5%	10.8%	165
2	Germany	18.3%	9.6%	147
3	Sweden	11.9%	6.3%	96
4	Norway	11.1%	5.8%	89
5	Finland	10.3%	5.4%	83
6	Denmark	10.2%	5.4%	82
7	Iceland	9.1%	4.8%	73
8	**Spain**	**8.7%**	**4.6%**	**70**
9	Japan	7.1%	3.7%	57
10	Austria	6.2%	3.3%	50

In this open survey on which travel destinations are associated with 'high sustainability', Spain came in 8th place with 70 responses.
Switzerland and Germany ranked first and second, well ahead of other destinations in the top 10.

In addition to 3rd place in the list of destinations that respondents would like to visit next (see Part I), this once again confirms that Spain is not only firmly established in the minds of respondents as a travel destination but is also perceived as a sustainable destination.

► **Note:** Similar terms with identical destination reference (e.g., North Sea - North Sea Coast - North Sea Region) were assigned to each other and clustered.

* Multiple answers possible.

Source: inspektour (international) GmbH, 2025

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3. General relevance of touristic offers and infrastructure elements

Note: To support the destination decision, the top 5 aspects or offer and infrastructure elements should be emphasised when addressing the target group. These serve primarily as decision criteria.

DESTINATION BRAND 23

Ranking of the considered offers and infrastructure elements with regard to the general relevance for destination selection (mean = 74%)

Source market: China

Base: All respondents | Number of respondents: 1,000
Top-two-box on a scale from "5 = very relevant" to "1 = not at all relevant"

		% of resp.			% of resp.
1	Scenery / nature	82%	20	Digital information and services	74%
2	Arrival options / accessibility	80%	21	(Spa) gardens / parks / green spaces	72%
3	Culinary offerings	80%	22	Events	72%
4	Climate friendliness / CO_2 neutrality of the tourist offerings	80%	23	Swimming pools / adventure pools / thermal baths	72%
5	Town and city scape(s) / town centre / architecture	80%	24	Wildlife parks / zoos	71%
6	The tourist destination as a whole (overall impression)	79%	25	Spa facilities with offerings for wellness, personal care, fitness and preventive health treatments	70%
7	Regionality / authenticity of tourist offerings	79%	26	Health and spa services	70%
8	Internet access	79%	27	Hiking facilities	70%
9	Service and customer orientation	79%	28	Barrier-free accessibility of the tourist offerings	70%
10	Value for money	79%	29	Winter sports facilities	68%
11	**Sustainability of tourist offerings**	**78%**	30	Possibilities for workcations	68%
12	Accommodation offers	78%	31	Water sports facilities	68%
13	Castles, palaces, mansions	78%	32	Offer to experience Japanese culture / gastronomy	68%
14	Local mobility services	77%	33	Cycling facilities	67%
15	Beach / bathing facilities	76%	34	Offer of automobile museums	67%
16	Shopping facilities	76%	35	Wellness and beauty offerings	66%
17	Art and cultural offerings	75%	36	Harbours / marinas	66%
18	Tourism office / tourism services / tourist information	75%	37	Campsites / caravan and motorhome sites	65%
19	Local recreation facilities / possibilities for day trips	75%			

The relevance of sustainable tourism aspects, offers and infrastructure is high or very high for 78% of the respondents. The highest relevance in the destination decision is "Scenery / nature" (82%), followed by "Arrival options / accessibility" and "Culinary offerings" with 80% each.
It should be noted that the percentages, especially among the top 20 places, are (very) close to each other, between 74% and 82%.

Source: inspektour (international) GmbH, 2025

► **Note:** Last survey taken into consideration in October / November 2023

3. General relevance of touristic offers and infrastructures

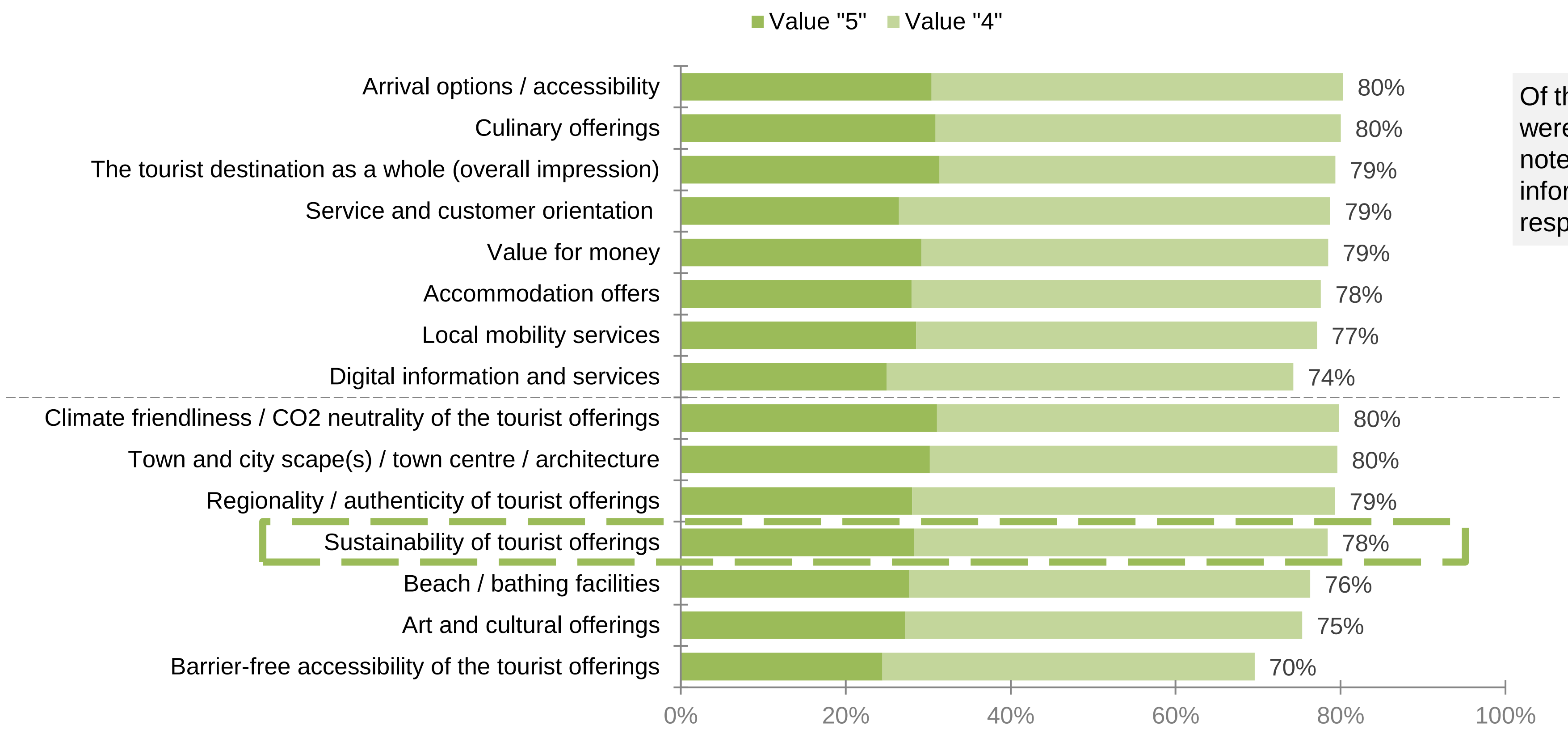
General relevance for destination selection

> How relevant are the following touristic aspects, offers and infrastructures when you choose a tourist destination for a holiday trip with at least one overnight stay in general (i.e., regardless of a specific tourist destination)?

> Top-two-box on a scale from “5 = very relevant” to “1 = not at all relevant” (in % of respondents)

■ ***Offers and infrastructure elements***

Source market: China
Base: All respondents
Number of respondents: 1,000



Of the 15 offer and infrastructure elements that were used to evaluate Spain, it should also be noted that accessible infrastructure and digital information systems are less relevant for the respondents' destination decision in comparison.

Source: inspektour (international) GmbH, 2025

3. General relevance of touristic offers and infrastructures

General relevance: “Sustainability of tourist offerings”

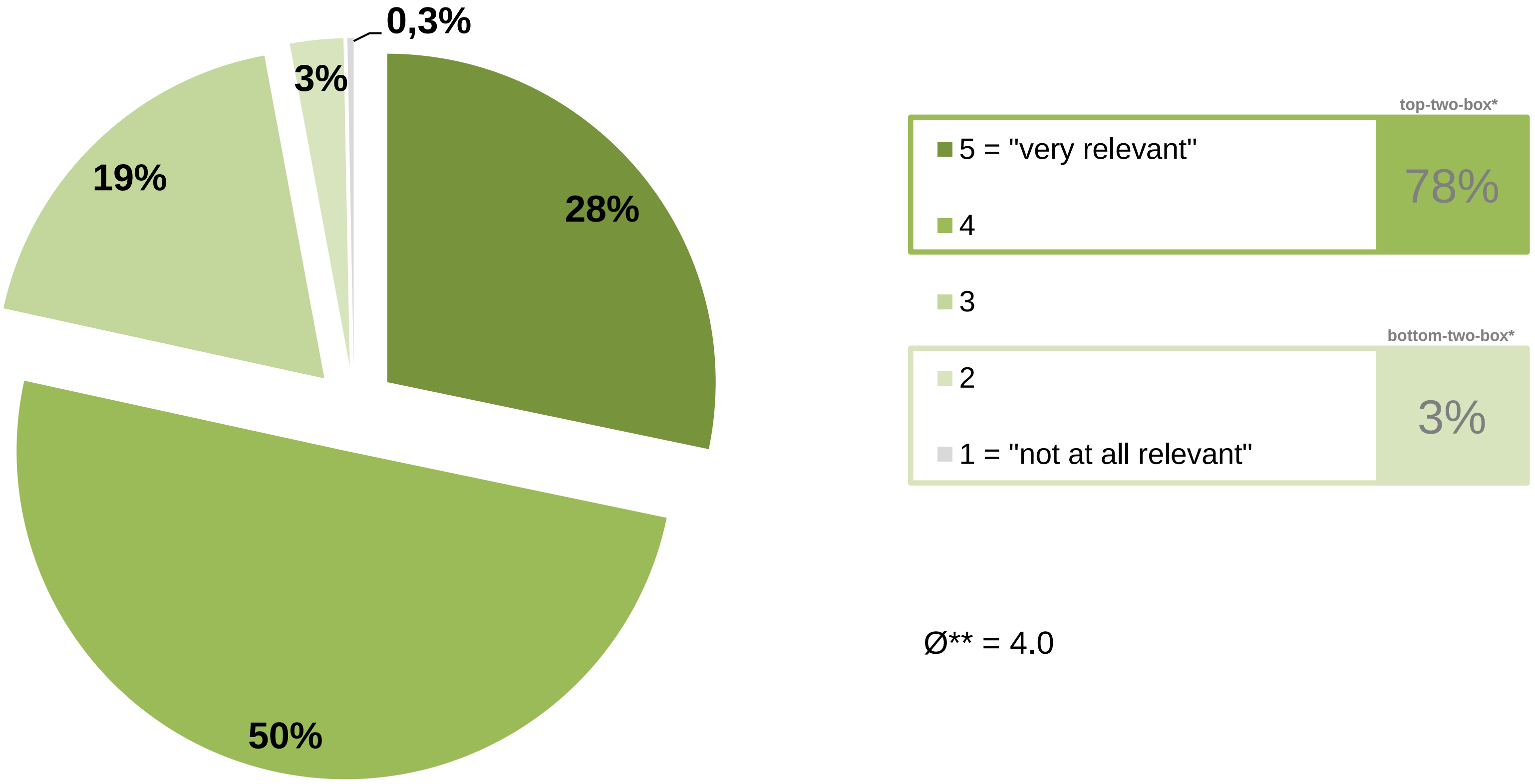
> How relevant are the following touristic aspects, offers and infrastructures when you choose a tourist destination for a holiday trip with at least one overnight stay in general (i.e., regardless of a specific tourist destination)?

> Values (in % of respondents)

Offers and infrastructure elements

Source market: China
Base: All respondents
Number of respondents: 1,000

Looking at the overall scale, it should also be noted that only 3% of the respondents stated that A is less or not at all relevant.



Ø** = 4.0

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from “5 = very relevant” to “1 = not at all relevant”

Source: inspektour (international) GmbH, 2025

Outline – Part II

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4. Supported evaluation of offers and infrastructure – *Subgroups (1/2)*

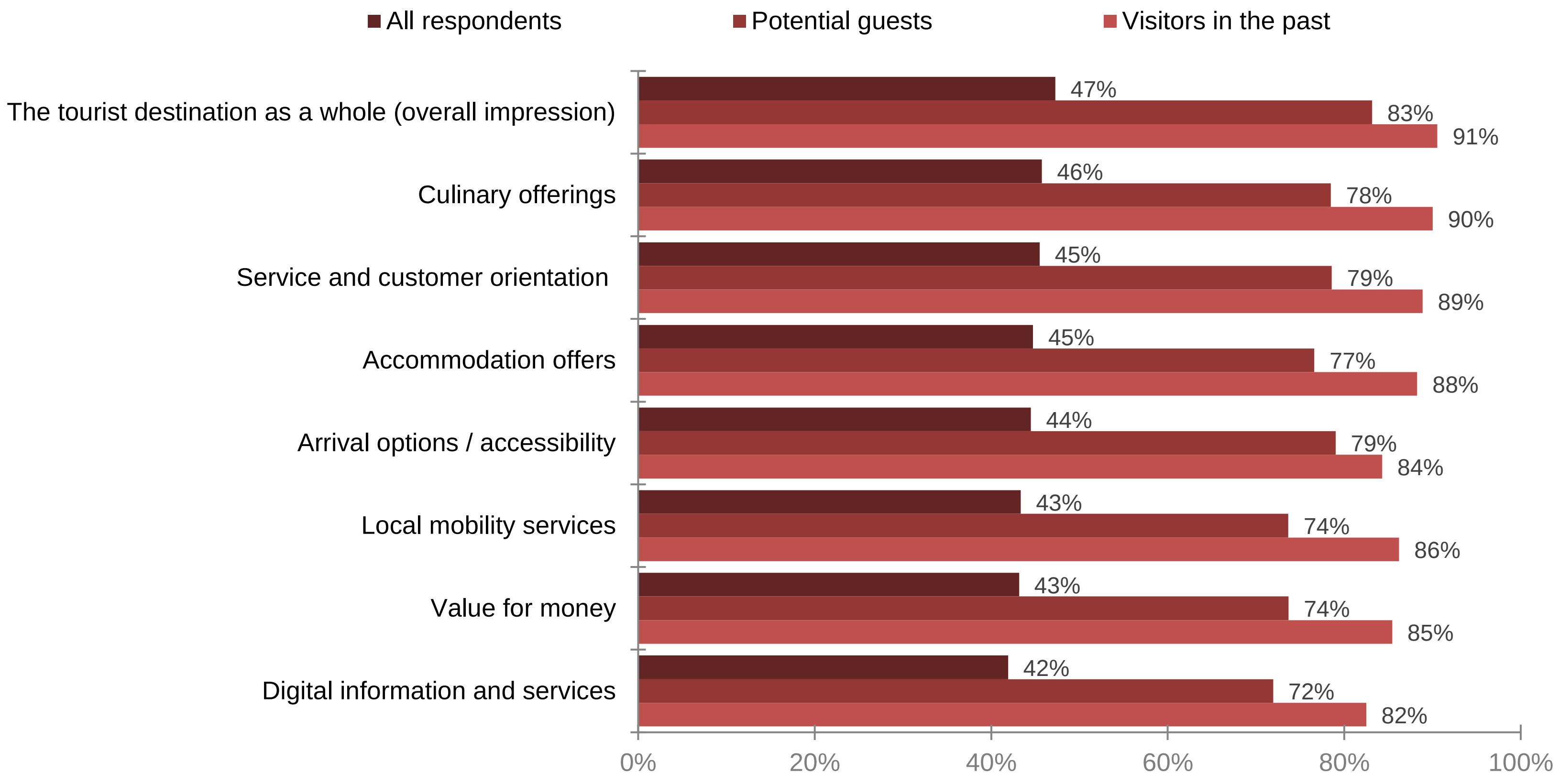
Supported evaluation of offers and infrastructure

> How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

> Top-two-box on a scale from “5 = very good” bis “1 = very bad” (in % of respondents)

■ ***Spain (西班牙)***

Source market: China
Base: All respondents
Number of respondents: 1,000



All respondents:
Refers to the total number of respondents (n = 1,000). Among them exclusively those were asked to assess Spain who know the tourist destination Spain at least by name

Potential guests:
Respondents who are familiar with the destination (even if only by name) but who have not yet spent a holiday with at least one overnight stay there

Visitors in the past:
Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

Source: inspektour (international) GmbH, 2025

The respondents consistently rated Spain as good or very good based on the selected offer and infrastructure elements. Of the 11 destinations rated in the China source market, Spain ranks third overall, behind Switzerland and Germany. With reference to 'The tourist destination as a whole (overall impression)', Norway moves ahead of Spain in the overall ranking (see DB23 complete report from page 109 on)

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4. Supported evaluation of offers and infrastructure – *Subgroups (2/2)*

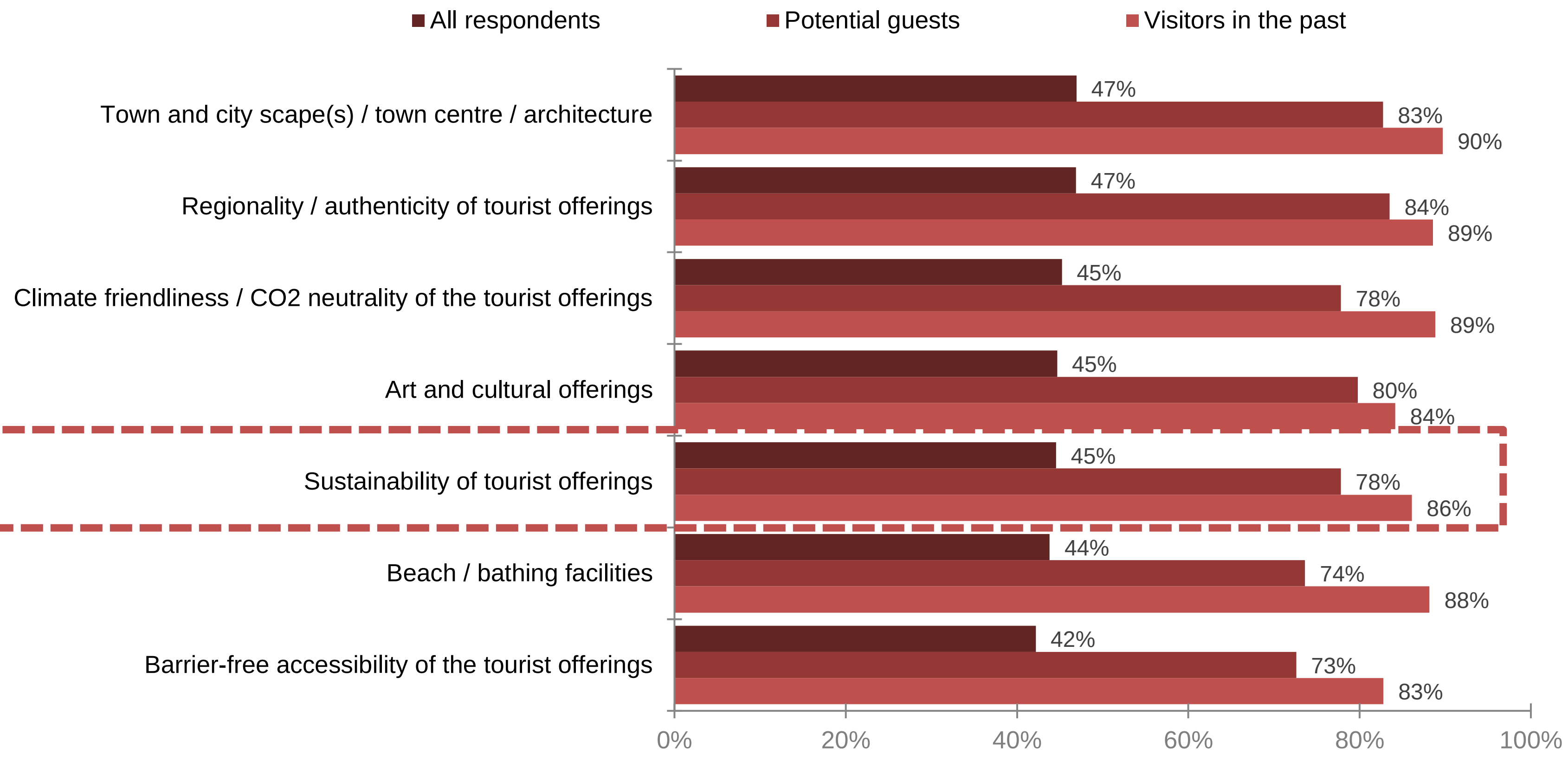
Supported evaluation of offers and infrastructure

> How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

> Top-two-box on a scale from "5 = very good" bis "1 = very bad" (in % of respondents)

■ ***Spain (西班牙)***

Source market: China
Base: All respondents
Number of respondents: 1,000



All respondents:
Refers to the total number of respondents (n = 1,000). Among them exclusively those were asked to assess Spain who know the tourist destination Spain at least by name

Potential guests:
Respondents who are familiar with the destination (even if only by name) but who have not yet spent a holiday with at least one overnight stay there

Visitors in the past:
Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

Source: inspektour (international) GmbH, 2025

DESTINATION BRAND 23

4. Supported evaluation of offers and infrastructure

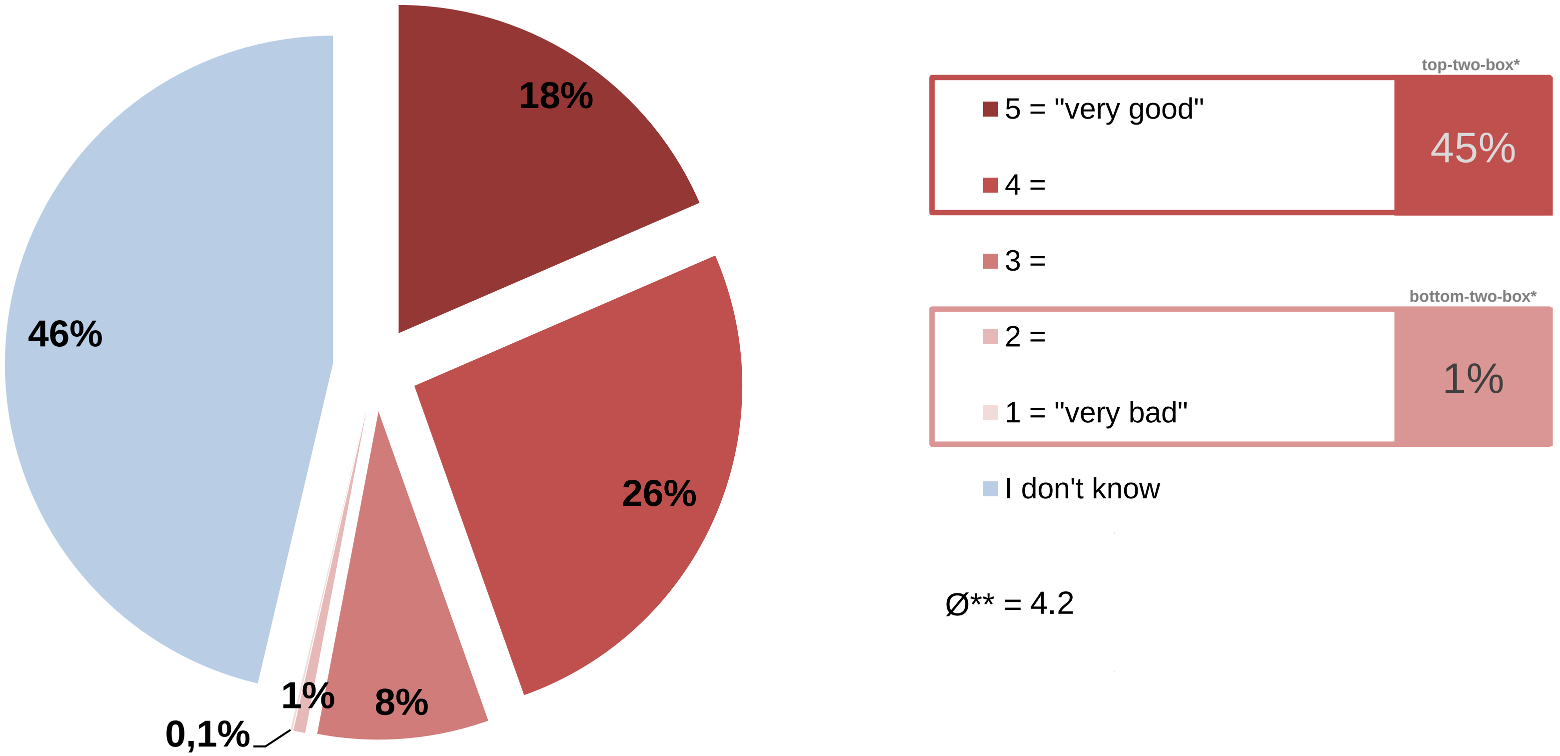
Supported evaluation “Sustainability of tourist offerings”

> How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

> Values (in % of respondents)

■ ***Spain (西班牙)***

Source market: China
Base: All respondents
Number of respondents: 1,000



Source: inspektour (international) GmbH, 2025

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from “5 = very good” to “1 = very bad”

4. Supported evaluation of offers and infrastructure

Supported evaluation "Sustainability of tourist offerings"

> How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

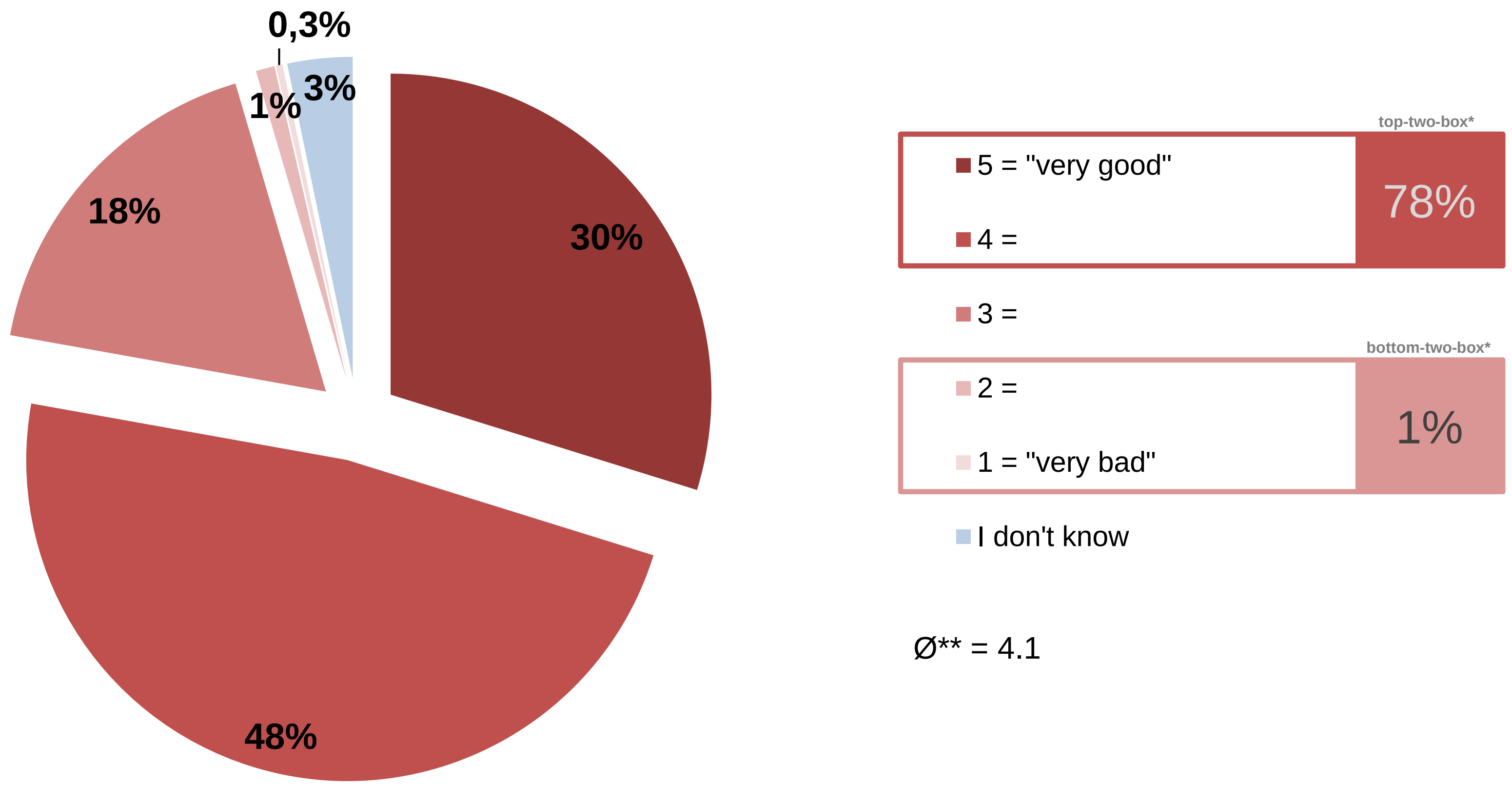
> Values (in % of respondents)

Spain (西班牙)

Source market: China
Base: Potential guests
Number of respondents: 302

Potential guests:
Respondents who are familiar with the destination (even if only by name) but who have not yet spent a holiday with at least one overnight stay there

Positive assessment (78%) of the sustainable infrastructure of Spain as a holiday destination by potential guests



Source: inspektour (international) GmbH, 2025

* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very good" to "1 = very bad"

4. Supported evaluation of offers and infrastructure

Supported evaluation "Sustainability of tourist offerings"

> How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

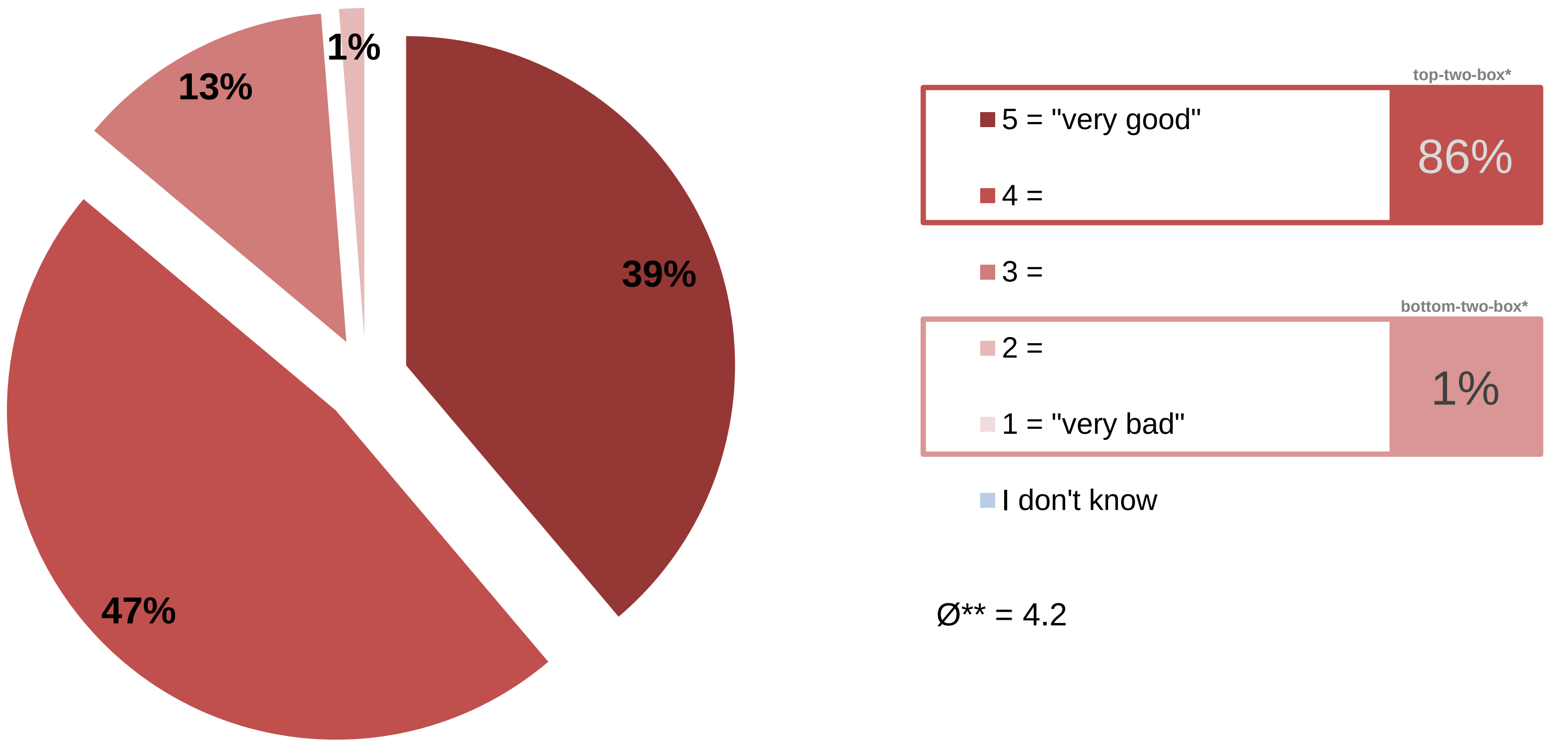
> Values (in % of respondents)

Spain (西班牙)

Source market: China
Base: Visitors in the past
Number of respondents: 245

Visitors in the past:
Respondents who have already holidayed in the tourist destination (with at least one overnight stay)

While 3% of the 'Potential guests' subgroup stated that they were unable to rate 'Sustainability of tourist offerings', all of the 'Visitors in the past' gave a rating. 86% rated 'Sustainability of tourist offerings' as good or very good.



* Deviations of 1% from the sum of the individual values are possible due to rounding.
** Scale from "5 = very good" to "1 = very bad"

Source: inspektour (international) GmbH, 2025

4. Supported evaluation of offers and infrastructure – *Sociodemographic differentiation*

Supported evaluation "Sustainability of tourist offerings"

> How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

> Values (in % of respondents)

■ ***Spain (西班牙)***

Source market: China
Base: All respondents
Number of respondents: 1,000

Sex	Significance n.s.	Top-Two-Box	Bottom-Two-Box	Mean	Value 5 ("very good")	Value 4	Value 3	Value 2	Value 1 ("very bad")	Don't know	Number of respondents
female		44 %	1 %	4,1	18 %	26 %	8 %	1 %	0 %	47 %	490
male		46 %	0 %	4,2	19 %	26 %	9 %	0 %		46 %	510

Age group	Significance n.s.	Top-Two-Box	Bottom-Two-Box	Mean	Value 5 ("very good")	Value 4	Value 3	Value 2	Value 1 ("very bad")	Don't know	Number of respondents
14-24 years		42 %	1 %	4,0	12 %	30 %	9 %	1 %		48 %	166
*1 25-34 years		52 %	0 %	4,1	22 %	30 %	12 %	0 %		36 %	245
*1 35-44 years		48 %	0 %	4,3	23 %	25 %	7 %	0 %		45 %	221
45-59 years		39 %	1 %	4,2	16 %	23 %	7 %	1 %	0 %	53 %	368

Formal education**	Significance n.s.	Top-Two-Box	Bottom-Two-Box	Mean	Value 5 ("very good")	Value 4	Value 3	Value 2	Value 1 ("very bad")	Don't know	Number of respondents
secondary education		36 %	1 %	4,1	12 %	24 %	6 %	1 %		58 %	144
*2 tertiary education		46 %	1 %	4,2	20 %	27 %	9 %	1 %	0 %	44 %	852

Household size	Significance n.s.	Top-Two-Box	Bottom-Two-Box	Mean	Value 5 ("very good")	Value 4	Value 3	Value 2	Value 1 ("very bad")	Don't know	Number of respondents
1-person-hh*		23 %		3,9	6 %	16 %	9 %			69 %	47
2-person-hh		42 %	1 %	4,2	18 %	25 %	5 %		1 %	52 %	160
3-person-hh		45 %	1 %	4,2	19 %	26 %	9 %	1 %		45 %	587
4 and more persons in hh		50 %	1 %	4,2	20 %	30 %	8 %	1 %		42 %	206

The socio-demographic differentiations show that middle-aged respondents (*1) and those with a higher level of education (*2) in particular rate the sustainable infrastructure in Spain as good or very good.

Source: inspektour (international) GmbH, 2025

* Sample size < 100: Higher statistical uncertainty due to relatively small sample size.
** 0.4% of the 1,000 respondents do not fit into the listed classifications of formal education.

4. Supported evaluation of offers and infrastructure – *Sociodemographic differentiation*

Supported evaluation "Sustainability of tourist offerings"

> How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

> Values (in % of respondents)

■ ***Spain (西班牙)***

Source market: China
Base: All respondents
Number of respondents: 1,000

Children under 14 years	Significance n.s.	Top-Two-Box	Bottom-Two-Box	Mean	Value 5 ("very good")	Value 4	Value 3	Value 2	Value 1 ("very bad")	Don't know	Number of respon-dents
hh without children under 14 years		41 %	1 %	4,2	16 %	25 %	7 %	1 %	0 %	51 %	489
hh with 1 child under 14 years		47 %	0 %	4,2	21 %	26 %	10 %	0 %		43 %	447
hh with 2 and more children under 14 y.*		51 %	2 %	4,1	20 %	31 %	10 %	2 %		37 %	63

Net household income**	Significance sig.	Top-Two-Box	Bottom-Two-Box	Mean	Value 5 ("very good")	Value 4	Value 3	Value 2	Value 1 ("very bad")	Don't know	Number of respon-dents
under RMB 10.000		43 %	1 %	4,0	15 %	28 %	11 %	1 %		45 %	214
RMB 10,000 up to < RMB 15,000		48 %	1 %	4,2	22 %	27 %	9 %	0 %	0 %	42 %	242
RMB 15,000 up to < RMB 25,000		44 %	1 %	4,1	17 %	28 %	11 %	1 %		44 %	277
RMB 25,000 and more		43 %		4,4	20 %	23 %	3 %			54 %	264

Town size	Significance n.s.	Top-Two-Box	Bottom-Two-Box	Mean	Value 5 ("very good")	Value 4	Value 3	Value 2	Value 1 ("very bad")	Don't know	Number of respon-dents
under 1,000,000 inh.		38 %	0 %	4,3	17 %	21 %	5 %	0 %		56 %	251
1,000,000 up to < 2,000,000 inh.		41 %	1 %	4,2	19 %	23 %	8 %	1 %		49 %	201
*1 2,000,000 up to < 5,000,000 inh.		47 %	1 %	4,2	19 %	28 %	7 %	1 %	1 %	45 %	145
*1 5,000,000 inh. and more		49 %	0 %	4,1	19 %	30 %	11 %	0 %		39 %	402

Regional origin	Significance n.s.	Top-Two-Box	Bottom-Two-Box	Mean	Value 5 ("very good")	Value 4	Value 3	Value 2	Value 1 ("very bad")	Don't know	Number of respon-dents
East		44 %	0 %	4,1	17 %	27 %	11 %	0 %		45 %	291
North + North-East		36 %	2 %	4,2	18 %	18 %	6 %	2 %		57 %	186
North-West + South-West		41 %	1 %	4,0	15 %	27 %	10 %	0 %	0 %	48 %	228
*2 South-Central		53 %	0 %	4,3	23 %	30 %	7 %	0 %		40 %	295

In addition, respondents from cities with a population of 2 million or more (*1) and the 'South-Central' region (*2) rate Spain's sustainable infrastructure as good or very good.

Source: inspektour (international) GmbH, 2025

* Sample size < 100: Higher statistical uncertainty due to relatively small sample size.
** 0.4% of the 1,000 respondents did not disclose their net household income.

4. Supported evaluation of offers and infrastructure – *Standard target group analysis*

Target group definitions – destination Spain (西班牙)

Target group	Definition
"Gen Z"	■ Age of the respondents: 14-24 years
"Millennials"	■ Age of the respondents: 25-42 years
"Gen X"	■ Age of the respondents: 43-54 years
"Silver"	■ Age of the respondents: 55-59 years
"Young people from Tier 1 cities"	■ Age of the respondents: 14-42 years and ■ Town size: Tier 1 cities
"Young people from Tier 2/3 cities"	■ Age of the respondents: 14-42 years and ■ Town size: Tier 2/3 cities
"Elder people from Tier 1 cities"	■ Age of the respondents: 43-59 years and ■ Town size: Tier 1 cities
"Elder people from Tier 2/3 cities"	■ Age of the respondents: 43-59 years and ■ Town size: Tier 2/3 cities

Note: These 8 target groups were defined by TourSpain Hong Kong to conduct the target group analysis as part of DB23 and will also be used in this report to assess the sustainable infrastructure.

4. Supported evaluation of offers and infrastructure – *Standard target group analysis*

Supported evaluation of offers and infrastructure

> How do you assess the following touristic aspects, offers or infrastructures of the following tourist destination?

> Top-two-box on a scale from "5 = very good" to "1 = very bad" (in % of respondents)

	Top-Two-Box	Value 5 ("very good")	Value 4
All respondents	45 %	18 %	26 %

Standard target groups	Top-Two-Box	Value 5 ("very good")	Value 4	Significance
Gen Z	42 %	12 %	30 %	sig.
*1 Millennials	50 %	23 %	27 %	n.s.
Gen X	42 %	18 %	23 %	n.s.
Silver	33 %	11 %	21 %	n.s.
Young people from Tier 1 cities	48 %	18 %	31 %	n.s.
*2 Young people from Tier 2/3 cities	45 %	22 %	23 %	n.s.
Elder people from Tier 1 cities*	45 %	22 %	24 %	n.s.
Elder people from Tier 2/3 cities	40 %	17 %	23 %	n.s.

Level of significance min. 0.05 (abbreviations: sig. = significant / n.s. = not significant, for further information see glossary).
Top-Two-Box: Deviations of 1% from the sum of the individual values are possible due to rounding.

Content of the analysis:

Study year
Destination Brand 23
Source market: Destination
SM 05 CN: Spain (西班牙)
Offers / infrastructure
Sustainability of tourist offerings
Standard target groups
All
Base: All respondents
Number of respondents: 1,000

DESTINATION BRAND 23

Among the 8 target groups, the 'Millennials' (*1) and the 'Young people from Tier 1 cities' (*2) in particular rate Spain's sustainable infrastructure as good or very good.

Source: inspektour (international) GmbH, 2023

* Sample size < 100: Higher statistical uncertainty due to relatively small sample size.

Initial findings and conclusions form Part I:

- The aspect of sustainability plays a (significant) role for the Chinese respondents when deciding on a travel destination.
- Over two-thirds of the respondents intend to travel abroad both within the next 12 months and within the next 3 years.
- Spain is already firmly established as a holiday destination in the minds of those surveyed.
- There is also an interest in sustainable holidays - however, the highest general interest is in culinary, nature and visiting castles. Contact with the local culture is also important. A combination of these themes is a good way of designing offers and addressing target groups.
- Develop travel packages with basic accommodation and flights at a fair price and include social aspects as well as sustainability in the communication.
- Spain is considered particularly suitable for ‘small-town flair’, ‘culinary / gastronomic specialities’ and ‘nature’, but also for sustainable holidays. Over two-thirds of the respondents confirmed this perception for Spain.
- These results are confirmed by the subgroups ‘Potential guests’ and ‘Visitors in the past’. And: Visitors in the past in particular confirm with 84% that Spain is suitable or very suitable as a sustainable travel destination.
- In addition, ‘visitors in the past’ rate the following aspects in particular as good or very good for Spain as a holiday destination: Nature preservation, townscapes / architecture und landscapes.

Further findings from Part II:

- ‘Sustainability of tourist offerings’ is relevant for the destination decision - even more relevant, however, are: Scenery / nature, Arrival options / accessibility, Culinary offerings, Climate friendliness / CO2 neutrality of the tourist offerings and Town and city scape(s) / town centre / architecture.
- 8th place in the overall ranking of international destinations associated with ‘high sustainability’.
- Consistently good or very good rating of Spain for selected offerings and infrastructure elements.
- The target groups “Millennials” and ‘Young people from Tier 1 cities’ rate Spain's sustainable infrastructure as good or very good.
- Competitive comparison (see DB23 complete report from page 109 on):
    - Of the 11 destinations assessed in the source market China, Spain ranks third overall in the evaluation of the offer and infrastructure elements, behind Switzerland and Germany.
    - With regard to item ‘The tourist destination as a whole (overall impression)”’, only Norway moves ahead of Spain in the overall ranking.

Conclusion:

- The results make it clear that travellers from China take sustainable aspects into account when planning their trip and deciding on a destination.
- Furthermore, Spain is already firmly anchored in their minds both in general and as a sustainable destination.
- In the following chapter, the first fields of action will show how this existing positioning can be expanded via the cross-cutting theme of ‘sustainability’ and which holiday themes, attributes, values and characteristics should be conveyed via the destination brand.

PART III:

DERIVATION OF INITIAL FIELDS OF ACTION AND MEASURES

Outline – Part III

DERIVATION OF INITIAL FIELDS OF ACTION AND MEASURES

CONTACT & IMPRINT

Derivation of initial fields of action and measures:

On the following page, an overview of first fields of action are given in order to (further) position Spain as a sustainable destination (in combination with themes like culinary, nature and visits to castles) in the Chinese source market and to be able to specifically include target group-related sustainability needs/interests in target group marketing.

The first step was to define three fields of action (see also the following page):

1. Brand development / positioning
2. Marketing & cooperation
3. Market research & information

Initial measures are listed for each of the three fields of action.

For the first field of action and the associated positioning of Spain, detailed information on brand positioning are given on page 66. The themes, attributes and characteristics listed there should be conveyed via the Spanish brand to be able to specifically address the target groups shown and position Spain as a sustainable travel destination.

In addition, communication should generally consider sustainable aspects to address the needs and interests of the target groups (see also page 66).

inspektour
TOURISM AND MARKET RESEARCH

Strategic positioning of Spain as a sustainable tourist destination (in combination with the themes culinary, nature, castles)

First recommendations + measures

I. Field of action
Brand strategy / positioning

Increasing awareness and thematic perception of Spain as a sustainable tourist destination and suitable for sustainable trips

Therefore: Development of a brand development concept

Product development: Travel (part) packages incl. hotel and transport and based on the theme 'sustainable' in combination with culinary, nature and castles

II. Field of action
Marketing & cooperation

Development of a strategic and operational marketing plan with focus on:

Theme marketing: Increasing theme suitability for sustainable travel to Spain

Target group focus: Millenials + Young people from Tier 1 cities

Activities: Targeting primarily via

- Chinese social media channels (like WeChat, Weibo), bloggers, influencers
- Newsletters and consumer fairs;
- Press / PR: Chinese trade press + public relations (newsletter, workshops, press trips);

Cooperation: Identify and form marketing cooperations with (new) partners (tourism sector, non-tourism sector - e.g. Spanish DMOs, ANTOR)

III. Field of action
Market research & information

Closing data gaps regarding the general perception of Spain and concrete target groups - e.g. with regard to:

- Awareness of Spain / Spanish destinations
- Willingness to visit Spain / Spanish destinations
- Interest in themes and suitability of themes: Which themes / holiday activities do the Chinese associate with Spain / Spanish destinations (e.g. Barcelona, Madrid, etc.)?
- Target group/competition analyses

Regularly evaluation of the perception of Spain in the source market China

Regular transfer of knowledge about the Chinese market to the partners

Ressources and planning:
Definition of necessary resources (monetary / human) for the implementation over a period of 3 to 5 years.
Definition and integration of key performance indicators (KPIs) for both the documentation of the progress and the controlling

Brand strategy / positioning: These themes, attributes and characteristics should be conveyed via the Spanish brand:

'Sustainability' as an overarching cross-cutting issue

The following (sustainable) aspects play a primary role in the destination decision and should be conveyed via the brand:
environmental aspects (good air, clean water, intact nature), eat regional culinary products and get in touch with the local culture, good quality at a fair price, ecologically compatible, resource-saving and environmentally friendly, socially acceptable

Top 5 holiday topics, in which the Chinese respondents are generally most interested when on holiday:	**Top 5 properties from DB22,** that are relevant for the destination decision: DESTINATION BRAND 22	**Top 5 offer and infrastructure elements from DB23,** that are relevant for the destination decision: DESTINATION BRAND 23	**Top 5 characteristics for quality of life and welcoming culture from DB23,** that are relevant for the destination decision: DESTINATION BRAND 23
enjoying culinary / gastronomic specialities	decelerating / liberating	scenery / nature	welcoming / inviting
enjoying nature	diverse landscape	arrival options / accessibility	hospitable
visiting castles, mansions, parks and gardens	attractive	culinary offerings	politically stable
relaxing and resting	pleasant	climate friendliness / CO2 neutrality of the tourist offerings	open to all / non-discriminatory
enjoying the (small) city flair / atmosphere	restorative / relaxing	town and city scape(s) / town centre / architecture	great place to live

Outline – Part III

DERIVATION OF INITIAL FIELDS OF ACTION AND MEASURES

CONTACT & IMPRINT

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