

A silver laptop is open on a light-colored wooden desk. In the top left corner, there is a small potted plant with green, needle-like leaves. In the bottom left corner, a pair of black headphones is visible. The background is a solid light blue color.

Turisme de Barcelona

December 2020

Professional nomads

Preliminary study for the "Workation" project

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Executive summary

The main objective of Barcelona Workation is to attract visitors who are able to work remotely, away from their usual place of residence, through a range of products and services that will give them everything they need to work, and offer an attractive experience at the destination at the same time.

Market potential

70% of those surveyed are currently working remotely

This market has a clear potential. Current working conditions are forcing many workers employed by other people to work from home (80%). In the case of self-employed or freelance workers the percentage is 100%.

77% would agree to change their place of residence on a temporary basis, and 84% of cases see it as a feasible option

Predisposition

The study shows us that people of all backgrounds and ages are extremely willing to experience a temporary change of residence.

Requisites for making the choice

The most important requirements are connectivity, medical insurance and housing prices.

The most important requisites when it comes to choosing a destination as a temporary residence are connectivity, medical insurance and housing prices. These are closely followed by cultural and artistic activities and the possibility of learning languages. A third group of priorities focuses on activities in the open air, the climate, mobility, and contact with expats and locals.

Type of destination

Urban destinations are the preferred choice for an international experience

As far as the most-requested destination is concerned (multiple answers), the most popular are urban locations or locations close to a big city and in a coastal setting. Rural locations are the preferred alternative for people who don't want to move from their country.

Objectives and methodology

The **objective of the study** is to gather information that will help us ascertain the interest of the population in changing their place of residence on a temporary basis while continuing to work.

As a result of the new situation with COVID, many workers have been forced to work remotely and this has opened a window of opportunity that will allow them to do their job from another location.

Through the study we want to ascertain:

- If this is a real trend: % individuals working remotely.
- If they are able to change their place of residence.
- If they want to do so.
- What are the barriers to this change.
- What they evaluate when choosing a location.
- Where they would like to move: an urban or rural setting.
- Which cities they would like to move to.

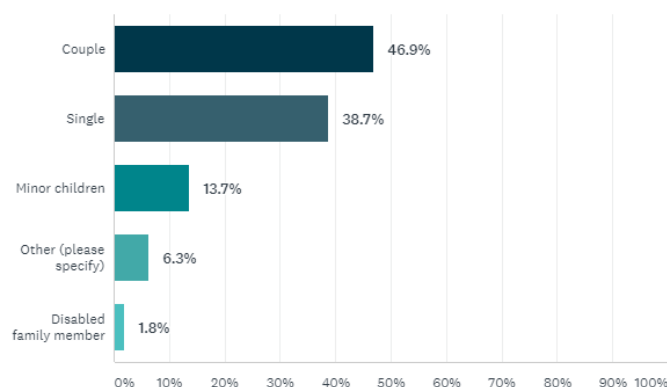
We used a CAWI questionnaire as our **analytical tool** and surveyed 271 people on the Turisme de Barcelona database.

Results

Socio-demographic data

Most of the respondents are aged between 25 and 55. Those from generation Y, better known as millennials, account for more than 30% of respondents. Of these, nearly 50% are cohabiting, followed by singles, who represent 38.7%. Families with children aged under 18 account for 13.7%, and families with adult children represent almost 5% of the total (see chart 1).

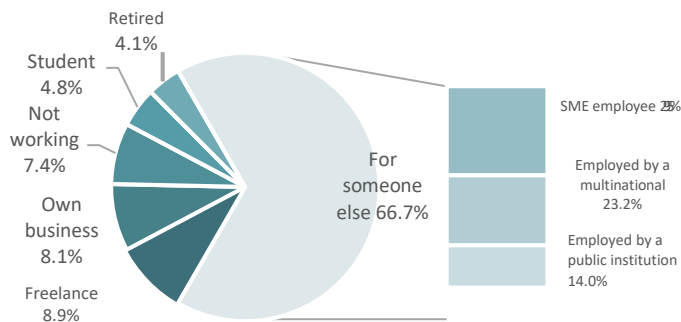
Chart 1. Family situation. Source: Turisme de Barcelona



Nearly 70% of respondents work for someone else, 23.2 % of them for multinationals, 29.5% for small and medium enterprises and 14.0% for public institutions.

Individuals who are self-employed or work for their own company account for nearly 20% of respondents. Individuals who are not working, are studying or have retired account for less than 15% (see chart 2).

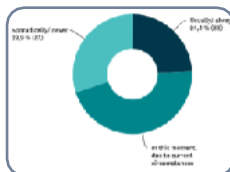
Chart 2. Employment. Source: Turisme de Barcelona



If we take into account the place of residence of the respondent, we see a high variability, with more than 50 nationalities represented. Particularly prominent are the Italians, US citizens, people from the rest of Spain and the British, as individually they account for more than 5%.

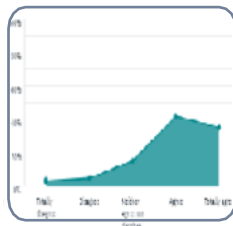
1. Predisposition to a change of residence

Remote working



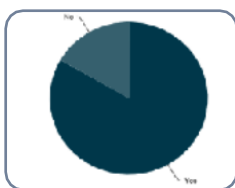
- **24%** of respondents **usually** work remotely, with **46%** doing so due to the **current circumstances** (COVID-19 crisis).
- 80% of workers employed by someone else currently work from home, and this increases to 100% in the case of self-employed or freelance individuals.

Willingness to change residence on a temporary basis

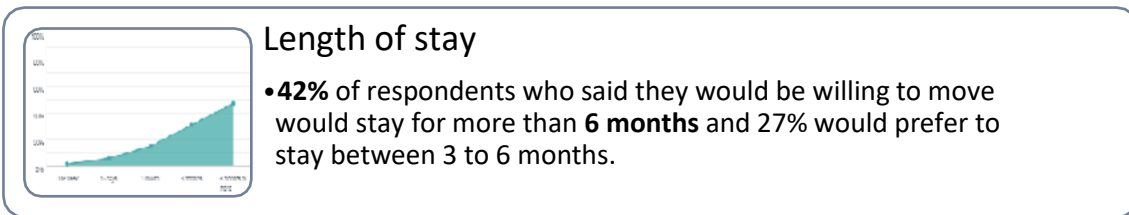


- **76.7%** of respondents would **agree** or totally agree to changing their residence on a temporary basis. It is important to point out that 36% fully agree.
- There are no major differences in terms of segmentation by age.

Feasibility of changing residence on a temporary basis



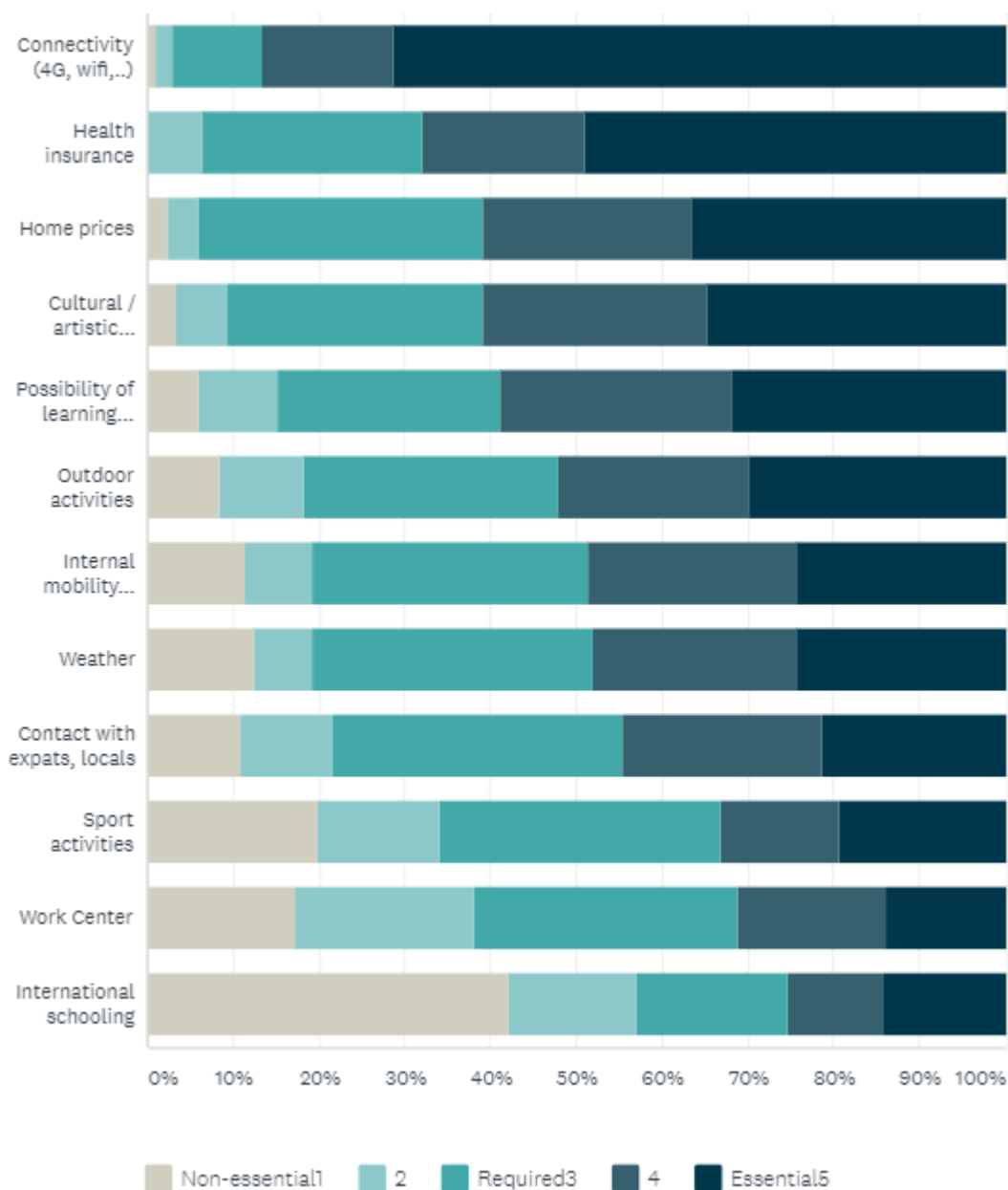
- **83.4%** consider it **feasible** to change residence. By occupation, 100% of **freelancers** and 88% of people **working for multinationals** would be able to move on a temporary basis.
- 16.6% of people who don't consider a temporary move feasible have given the following reasons: family (34%), work (31%), school age children (25%). They also **mentioned health and financial reasons**.



2. Attributes that influence a choice of destination

The most important attributes are **connectivity**, **medical insurance** and **housing prices**. These are closely followed by cultural and artistic activities and the possibility of learning languages. A third group of priorities focuses on activities in the open air, climate, mobility, and contact with expats and locals. If we look at the percentage of highly essential aspects, the differences become more pronounced, and connectivity and medical insurance become more important, with the others relegated to the background (see chart 3).

Chart 3. Requisite attributes for choosing a destination for a temporary stay. Source: Turisme de Barcelona

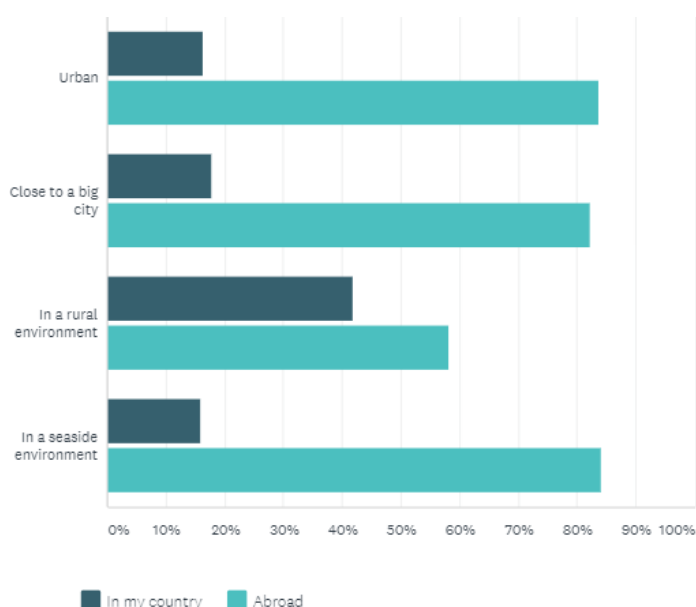


When it comes to determining which attributes are essential for a destination to be considered as a place to work remotely, we see that there are no differences between the individuals who would be willing to move and those who wouldn’t. This shows that there are basic needs that are detected regardless of the individual circumstances of the person. This is why the previous analysis takes into account all those who could work remotely whether they want to or not.

3. Type of preferred destination

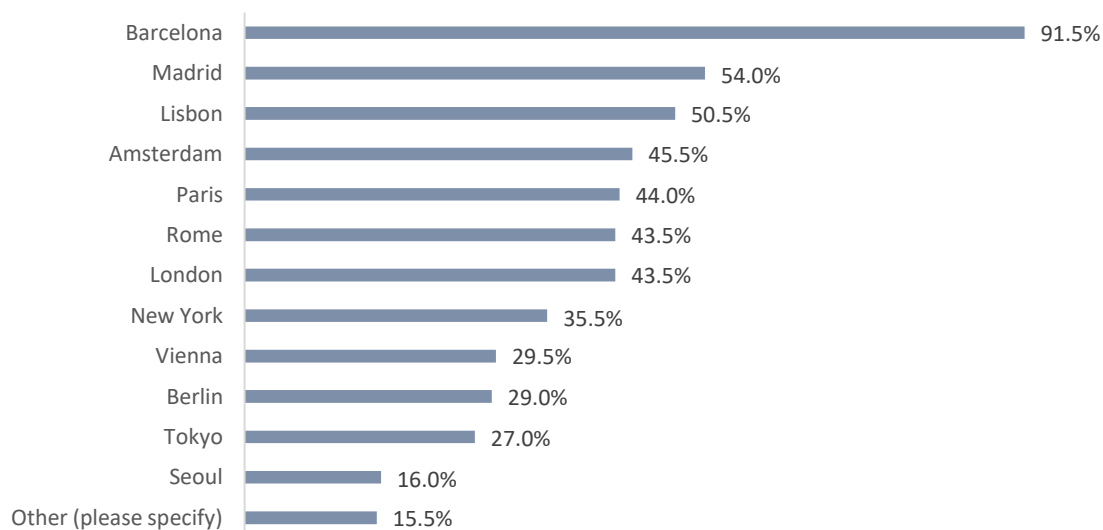
People who are looking for a temporary change of residence prefer to travel abroad, with urban destinations and places near the coast the most sought after. Rural destinations are the best alternative for people who don’t want to move from their country (see chart 4).

Chart 4. Type of preferred destination



Nevertheless, we wanted to compare the potential competition at an urban level, taking into account the main European and world cities. Madrid, Lisbon and Amsterdam were in the top 3, followed by Paris, Rome and London. Although Barcelona ranked first, it should be taken into account that this was probably due to a sampling bias (see chart 5).

Chart 5. Possible destinations for remote working. Source: Turisme de Barcelona



Conclusions

In conclusion, we can see that **the destination of Barcelona** has the opportunity and essential requisites to develop a product as a destination where people can come to work remotely.

70% of the population are **currently working remotely**. If we take into account individuals employed by other people, this figure would increase to 80% and to 100% among self-employed workers. There is a very high **predisposition** to experiencing a **temporary change of residence** regardless of age and situation. 77% of them would agree to a temporary change of residence and 84% of cases consider it a feasible option.

Therefore, Barcelona **meets the basic criteria** mentioned when it comes to choosing a destination: **urban/near a big city and by the sea**. Rural accommodation is the preferred choice of the domestic market.

We should also bear in mind the **main attributes** for selecting a destination: **connectivity, medical insurance** and **housing prices**. Once the basic needs have been covered, we have to work on cultural and artistic activities, and the possibility of learning languages, not forgetting activities in the open air, climate, transport and getting around, contact with expats and locals, which can tip the balance between our city and a potential competitor.

In short, it is estimated that Barcelona could have a potential market for a product geared to people wanting to move their place of work on a temporary basis to a dreamt-of destination. We need to bear in mind the intrinsic characteristics of the destination – such as climate and location – as well as the possibility of providing access to basic necessities to make this lifestyle change.