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Government of Spain U.S. Market Study

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GOVERNMENT OF SPAIN U.S. MARKET STUDY
(Focus Groups Summary)

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GOVERNMENT OF SPAIN U.S. MARKET STUDY

Focus Groups Summary

Purpose:

The purpose of the focus group sessions was to identify major areas of concern among experienced U.S. residents who traveled to foreign destinations. In particular, the discussions focused on the the image of Spain as a vacation destination and the variables that influence the choice of Spain as a vacation destination.

The methodology used was to start each discussion by introducing broad issues of vacation travel, travelling to foreign destinations, and incrementally narrow down to a full discussion of the Spanish Tourist Product.

Groups' Characteristics:

Three focus groups were held in Princeton, New Jersey, Houston, Texas and Chicago, Illinois on March 31, April 6, and April 7, respectively.

Each of the focus groups consisted of 10-12 participants representing different age groups and an array ethnic, educational, occupational, and economic backgrounds. The groups also consisted of equal representation of males and females.

All focus group members had visited at least one foreign destination (excluding Mexico and Canada) in the past five years.

Perception of Travel:

The participants were asked to report "what comes first to their mind when they think about travelling on vacation." The following issues were raised:

1. Where to go?
2. How much money to spend?
3. What facilities are available at the destination? (hotels)
4. What type of food is offered at the destination?
5. Are other family members available to go on the trip? (spouse, children).
6. What is the weather going to be like?
7. What are the destination's attractions? ("what is there to see?" "what is offered there...music?...sports?")
8. What mode of transportation to be used to and at the destination?
9. What clothes to take along? (packing issues).
10. What am I going to learn from travelling to a particular destination?

11. What is the value of the U.S. \$ compared to other foreign currencies?
12. Change of routine, rest and relaxation, not having to work.
13. Excitement sharing with friends and relatives.
14. Confrontation with different cultures/languages.
15. What season should I take the trip in?
16. Convenience in terms of access to the destination (availability of nonstop/direct flights).

Recollections from Travelling Overseas:

The respondents had a good travelling experience to countries around the world. Among them were: England, France, Benelux, Germany, Italy, Austria, Switzerland, Greece, Turkey, Portugal, Spain, The Caribbean islands, Central and South America, Australia, New Zealand, Fiji, Thailand, South Africa, and Mauritius.

Those participants who had visited Spain did not report their visit immediately. Countries like England, France and Germany usually proceeded it.

The participants expressed a cultural shock when first going to a foreign destination: "different accents and terminology," "wrong side of the road in London," "I couldn't believe how many flowers...," "Policemen (bobbies) in London are so polite," "Houston is so modern compared to..." "You can get killed easily for misunderstanding..."

The word "different" was repeated constantly in all three groups: different languages, banks, people, architecture, food, transportation system, landscaping, service "You order a drink and you get one ice cube."

They also recalled a long flight with "jetlag" affecting their first few days of visit and a lot of walking. Some also mentioned that they missed their "comforts of home" like "no adequate water supply," "no ice," "small bathrooms" and "salt water showers in Spain."

Some participants recalled getting lost due to the different city plans, especially in European cities ("not done on a grid system." The safety issue was also raised ("It's safer in the U.S.")

Going to Europe was perceived as going to an old place "What hit me in Europe that the date of the buildings are older than our country."

Older participants mentioned the romance of going to European destination where they (or relatives) served during the second world war ("I was in the Normandy invasion," "Always go to the American cemeteries in Europe.")

The Decision Making Process to Choose a Particular Destination:

The participants emphasized the following issues when deciding where to go on vacation.

1. "Quality" of the tourist product: "good skiing" "good sailing"
2. Availability of activities at the destination.
3. Prestige and status symbol of particular destinations: "we like to go to places no one else knows about," or "I always wanted to go to Venice or England."

Some participants attached a "status symbol" to some foreign destinations like Australia, Gstaad, Hawaii, Bora Bora. Some added that "Europe has never lost its status symbol."

4. Romance, defined by some participants as "exotic atmosphere that you don't have here." was also a decision variable to choose a particular destination. The participants gave examples from destinations in Europe which are "very old," and offer "sidewalk cafes, different accents and mannerism."

5. Ability of the tourist experience at the particular destination to satisfy personal needs ("good facilities," "not loud," "I wanted to have an educational experience," "I wanted to see art and history.")

6. Input of other family members: "I would like to go to places where there is something for the kids." "We went there because children were out-of-school."

In addition, some participants decided to take a trip to a particular destination because other family member was going there ("I join my husband when he goes on a business trip or a convention" or "Cousins of my husband went to Spain so we joined them.")

7. Budget constraints of travelling to different destinations/rate of exchange.

8. Recommendations of friends and relatives.

9. Promotional campaigns of the destination: ("I read the travel column in the New York Times" "New York Times advertising," "I see it in the Lifestyles of the Rich and Famous."). Some participants agreed that movies filmed in foreign destinations attracted them to go there.

10. Excitement of crossing a border: "I have this stamp in my passport from another country."

11. Previous positive experience.

Packaged Tours vs. Individual Itinerary:

The issue of going overseas with tours or individually was raised at a certain point of the discussion. A consensus was reached with regard to going on individual tours which was perceived to be more "spontaneous." Since tours are always available at the destination, there is no need to take them from the U.S.A.

"Tours are not a vacation." They were tiring and perceived "crowded" to many who experienced them. However, sometimes, it is necessary to go on a tour because "you are alone in a strange country" information is not available on a particular destination ("You have to take a tour to Africa"), or there is a language barrier.

Package tours were also perceived appropriate for first timers and people who have limited time to spend. Also, package tours were perceived appropriate when there is a language barrier.

Image of Spain as a Vacation Destination:

Attractions:

1. Architecture: Gaudi
2. Museums: "Prado - the greatest museum"
3. Bullfights
4. Old cities with history: Granada - Alhambra, Barcelona
5. The countryside: Spain was perceived to be "a beautiful country," "colorful," and "hot." Northern Spain was perceived in particular scenery and hilly. Many recalled films shot at this part of the country.
6. Lovely beaches

Local People and customs:

1. Dishonest: "They stole my camera" "...American people are always charged more..."
2. "...Spanish people are arrogant people..."
3. The siesta: the country is shut down for 4 hours and this provides "...after hour life..."
4. Outdoor people "...people are outside at midnight!" "...they have uncomplicated lifestyle..."

5. Music and dancing - the classical guitar, castanets, Flamenco. Spain was perceived to be a very festive place and full of excitement.

6. "...Spanish people dress very well..."

7. Spanish people were perceived to be "very catholic." Some associated Spain with "older Catholic women wearing Mantilla."

Transportation:

The train was perceived as the most appropriate mode of transportation in Europe. This was mainly due to the fact that "air travel is very expensive" and the efficient service of many European "intercity fast train service."

The Spanish trains, however, were not perceived to be as efficient. Some described them as "the worst trains" "they are never on time" or "like in Italy: late and have livestock on them..."

Modern roads were perceived to be nonexistent and therefore, car travel was not appropriate ("dirt roads, no highway system..."). Many thought it would be common to see mule pulling a cart in many Spanish dirt roads.

Some thought it is "difficult to get around - "not like the rest of Europe"

Language:

Some thought that language barrier will cause problems for tourists in Spain "...In most countries you can get along with English but not in Spain..."

Some argued that the Spanish language in the U.S. is not associated with Spain but with Cuba or Latin America. The Spanish language is not exotic anymore ("...it is not like French...")

Food and Beverage:

The Spanish wine was perceived to be very good, and some even recalled advertising of Spanish Wine Trade Association in the USA and Canada. Some suggested to offer tours of Spanish vineyards.

The food was also perceived to be good. Some described Spanish food as "healthy and great" because ingredients like fish, olive oil, fruits and vegetables are incorporated in the Spanish diet.

The food was perceived to be very different from Mexican food.

Facilities:

The facilities in Spain were not perceived to be modern. Some even added "probably similar to Portugal..." Many perceived Spain with old buildings which were converted into inns. Some perceived Spanish hotels with bathrooms in the hall, no ice, no air conditioning, and hard beds.

Some could think about any major American hotel chain that has a property in Spain. Others believed that "you can always find a Hilton." Some thought that in some areas in Spain where one could find luxury hotels ("...for the Arabs...")

Spain was perceived to be dirty. "...I picture it like Latin America..." "...cockroaches all over..." "...I see a rat in my hotel..."

Some mentioned that it is important to consult friends and relatives before you check in into a Spanish pension.

Some raised concern about pricing policies of Spanish hotels. They believed "Americans are charged more" and that "you have to shop for hotels."

The European tourists:

Spain was perceived to be "overrun" by European tourists. One participant shared his experience in Torremolinos where "tourists from each country occupy different hotels."

Spain was perceived as a sun-sea-sand destination but many of the participants recognized that Spain is Europe's Caribbean and "If I'm going to go far - I am not going for a sun-sea-sand vacation."

Time to be spent in Spain:

The participants perceived Spain as a big country where one has to spend "a lot of time." One group arrived at a consensus that 2-3 weeks would be appropriate to "absorb all the things..."

Some argued that 3-5 days is enough to spend in Spain.

Shopping:

"Lovely shoes and bags."

Weather:

The Spanish weather was perceived to be very pleasant "a sunny destination"). The participants perceived March, April, and May to be the best time to visit Spain, mainly to avoid the European tourists.

Political Situation:

Many perceived Spain as "revolutionary." Some even used the word "fascist." "Spain was recently opened-up...it was putting off...you don't want to go to a country where police is in every corner."

A young traveler to Spain recalled the youth hostel's curfew.

Safety:

Spain was perceived to be a poor country with a lot of poverty. Consequently, minor crimes like purse snitching are common ("petty crime".)

"I was not told to stay in Saint Sebastian..."

People did not perceive political danger in Spain as in Italy.

Because Spain is unknown to many Americans, some recognized the problem of Xenophobia - fear and mistrust of foreigners/strangers.

Comparison of Spain to other countries:

As far as Europe was concerned, Spain was perceived as an "out-of-the-way" country for North American tourists who travel to Europe. Some also added that its "history is very different from the rest of Europe" and that "it is not as pretty as the rest of Europe." "Spain is isolated from Europe"

Although Spain was recognized as an EEC member, it was perceived to be "the least advanced: bad telephone communication, no computers."

Some people argued that "we have been trained to like Northern European countries through pictures and images ("...there is always something about northern Europe on TV...") The lack of knowledge about Spain was attributed to the American educational system: "...You don't study history of Spain in high school...You study northern European history..."

Although some perceived Spain to be similar to many Latin American countries, some did not affiliate it with Mexico. Spain was perceived to be much more "upmarket." One participant compared Spain to Nieman Marcus and Mexico to K-Mart. While Spanish people are perceived to be more aristocratic, Mexican were affiliated with occupation like gardeners, maids, food service industries.

To some, Spain was affiliated with the Hispanic population in the U.S. Others did not agree.

Combination of travel to Spain with other countries:

Although some thought that Spain is "too big" to combine a visit to Spain with other countries, others suggested the following countries:

1. Portugal (the Iberian peninsula concept).
2. Morocco ("an inexpensive jumping board")
3. The Spanish islands
4. Greece
5. Gibraltar

Exposure to Information About Spain:

The majority of the participants were not exposed to information about Spain "I never so an ad in the travel section of the newspaper..."

Some were exposed to Spain through college course work, and news clips on TV. Other source of information included Iberia billboard, articles in newspaper (museum section of N.Y. Times), Club Med brochure, National Geographic, Island Magazine and through promotion of Spanish products (wine). Those who were exposed to Spanish advertising recalled "tiny ads" or "not on large pages."

Many mentioned that there are many promotional tools that should have mentioned Spain like: "American Airlines ad about Europe, travel clubs, airport billboards."

Some raised the possibility that they may have not paid attention to Spanish ads.

Suggestions for Improving Spain's Promotion:

Newspapers/Magazine advertising:

1. Full page advertising in local newspapers.
2. Articles in the travel section of the N.Y. Times (or other respectable newspapers).
3. Brochure inserts in major newspapers describing various images/destinations in Spain.
4. Magazine advertising: "which have mass readership" like Times, TV guide. Also in special magazines like women's magazines ("In some households ladies have a strong influence on vacation

time..."), fashion magazines, travel magazines (Travel and Leisure, European Life, Mc Calls, Frequent Flyer Magazines, Town and Country, Lodging (trade), Esquire, Atlantic.

5. Shooting Sports Illustrated swim suits issue in Spain.

TV advertising:

Themes: Advertise a general theme rather a single theme affiliated with Spain (e.g. bull fight). Include Spanish themes/personalities familiar to the American public (like Carmen Opera). Other themes include: children, beautiful Spanish girl(s), food, bullfights, clear water of the Mediterranean, art work, architecture. Another popular theme was romance.

Others suggested to introduce a commercial with no indication of Spain. At the end of the commercial the destination should be revealed.

Some suggested to develop a theme/place/landmark that will distinguish Spain from any other destination "...Spain needs an Eiffel tower..."

Positive image of the average Spaniard should be also portrayed.

Some suggested to include personalities in TV ads. The personalities need not be affiliated directly with Spain but would recommend a trip there (Bill Cosby, Vanna White, Brooks Shields, Michael Jackson, Robin Leach, The Beach Boys). The Australian example was a very good example with Paul Hogan's promotion.

Good music (classical guitar) and multiple shots were perceived to be very important ("big pictures" "color" "action").

Public Relations:

1. Personal public relations of government official who will come and "sell" Spain in large metropolitan areas. Some even suggested that the prime minister of Spain should be involved in the promotion campaign. Some mentioned the Spanish royal family members ("...like in England...It always attract Americans...")

2. Personalities (Dead or Alive):

Fernando Lammás
Plácido Domingo
Salvador Dalí
Picasso
Miro
Hemingway
Julio Iglesias
Ponce de León
Cortez

3. Spanish evenings to be sponsored by the Spanish tourist board.
4. Travel agents parties.
5. International day: promotion of Spain in schools ("children take it home to mom and dad...children have an influence...")

Third party promoters:

1. Airline advertising: cheap rates, availability of direct routes to Spain, more flights.
2. Other Airline promotional tools: ("...TWA has a tour book of every destination they fly to...")
3. Fashion companies: Balenciaga, Paloma Picasso
4. Professional organizations (offering package tours to a certain destination).
5. Mail promotion through charge cards, banks.

Other:

1. A toll free number to inquire about Spain.
2. Free Gimmicks: Prizes of travel to Spain in TV shows, a TV station sponsoring a wedding in Spain, free castanets in the mail.
3. Producing more movies about/in Spain ("...like Out of Africa...Crocodile Dundee...")
4. Promotion in colleges for catholic/spanish studying students.
5. Events: "...They opened up China with the ping pong competition..." "...bicentennial in Australia..." "...500th anniversary of Columbus sailing..."

International competitions: (e.g. Miss Universe.)

6. Retail associations (Bloomingdale's Spanish week: bring fashion designers, gourmet food)
7. Art exports: exhibitions, films, theater, dance companies.

People Who Are More Likely to Go to Spain:

1. People who have roots there. Some participants thought that the hispanic market would be appropriate but an hispanic participant commented that Spain is not considered as prestige as England or France.
2. People who are interested in cheap vacation ("...two weeks in Spain are cheaper than renting a cottage on the New Jersey shore..." "...Spain is the least expensive with much to offer...")
3. The adventurer, flexible, "people who do not expect perfection."
4. Student and youth market who are studying the Spanish language in school.
5. People who have already been to the "classical" European countries.
6. People who like late night life.
7. Families.
8. Single career women.
9. People who are interested in culture.
10. Older retired couples.

Suggested Advertising Slogans:

1. The recent Greek ad was very popular: "...my parents were born in Ireland but I am going back home to Greece (Cradle of Civilization). The theme of "going back was suggested with relevance to Columbus: "Spain discovered America...Now rediscover Spain..."
2. "...You don't think to go there first, but once you've been there you want to go back..."