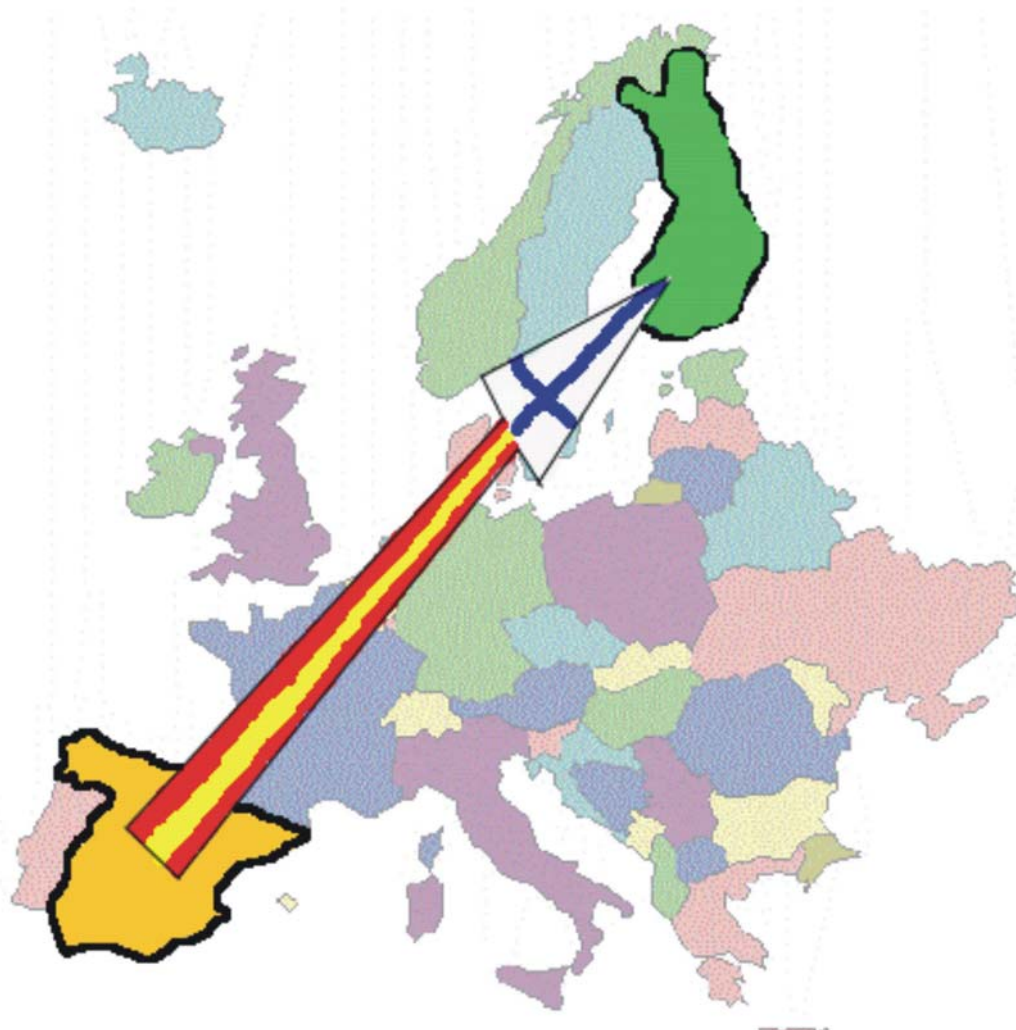


## Market research report

# “What Spanish tourists expect from country tourism in Finland”

By julián Amorrich, September 2002  
[julian.amorrich@viatransconsulting.com](mailto:julian.amorrich@viatransconsulting.com)



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## 1.- Introduction

The present report is the result of a market research done in Spain by *Via Travel Consulting* for *Keski-Suomen Maaseutumatkailun Teemaohjelmahanke* (country tourism project in Central Finland) during the Summer 2002.

The goal of this research was to find out the wishes and expectations of the potential Spanish tourists in Central Finland. Questions were asked about Finland because it is not sure if the Spanish know Finnish provinces

## 2.- Development and problems of the research

At first *Via Travel Consulting* drew a first draft of the questionnaire and passed it to *K-S Maaseutumatkailum Teemaohjelmahanke*, who sent it to various travel agencies and other tourism related businesses. All these companies provided us with new perspective and ideas in order to make the adequate questions for the final questionnaire. As a result we have a questionnaire which is interesting for a significant number of Finnish tourism related businesses.

The second part consisted in the interview of individuals. The city chosen to carry out the research was **Madrid** in a period that stretched from the **July 8<sup>th</sup> 2002** until **August 16<sup>th</sup> 2002**.

Getting a representative sample was quite problematic: at the beginning, we were planning to interview travel agencies customers in order to make sure that surveyed people like travelling and that they could show some interest in travelling to Finland. Unfortunately travel agencies were very busy because of the high season and they did not want to cooperate. Then we tried to carry out the interviews on the street, but this did not turn out to be very successful either. Finally we found two main locations where we reached our goal: 500 questionnaires. 28 % of the research was made in the biggest bookstore in Madrid and more than a half of it was made in the airport of Madrid.

The table below shows what kind of samples were made in each locatio

Place	% of questionnaires	Number of questionnaires
In front of travel agencies (Reyes St., Gran Via and Princesa St.)	17%	85
Fnac book store (Preciados St.)	28%	140
Barajas airport	55%	275

The **third step** was to enter the data into the computer and analyse the information to get the conclusions. The main variable in the research is the age. There are four age groups and in the analysis you can see the different needs of these groups. The age groups are divided in a scale from 25 years until 65 years. The table below shows the percentage of each age group in the research. These numbers concern only the people who would consider travelling to Finland. We have numbered the age groups from one to four so that it would be easier to refer to them in the research.

Age	Individuals	%
<b>Group 1:</b> 25 or less	106	25.42
<b>Group 2:</b> From 26 to 30	109	26.14
<b>Group 3:</b> From 31 to 45	151	36.21
<b>Group 4:</b> From 46 to 65	42	12.23
<b>Total</b>	417	100.00

During the next point the result of the analysis will be shown.

### 3.-Description of charts

#### 3.1 General information regarding Spanish tourists

Spanish tourists' favourite destinations are mainly **Sun and Beach** followed by **Nature and Excursions** and **Culture**. After these come **Snow and winter activities** and **Adventure** is the category they have less chosen. The interest for the first three kinds of destinations is not affected by the age, while the interest for the last two destinations is higher among the young population, decreasing as the age rises (see chart 1).

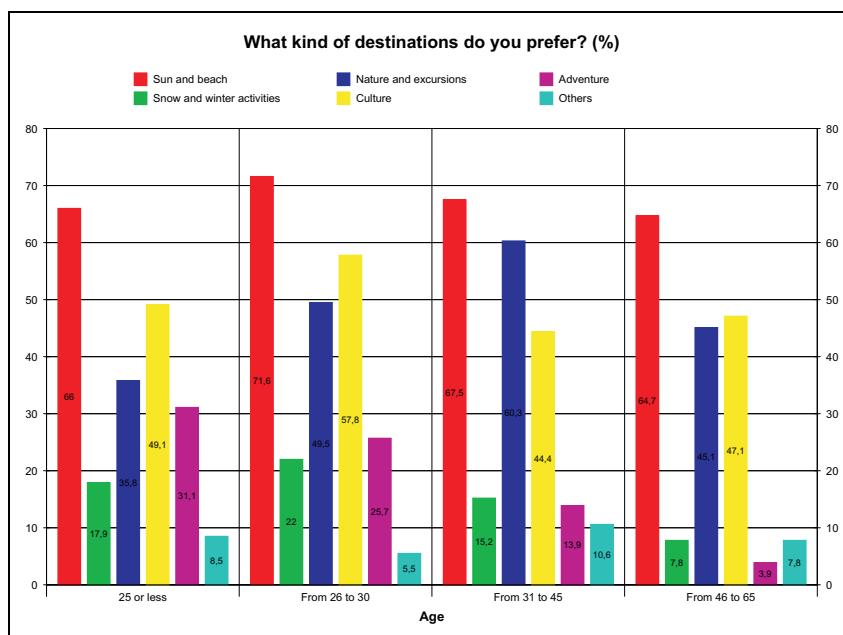


Chart 1: Destinations preferred by Spanish Tourist

Almost 60% of the interviewed Spanish people have travelled to Europe in the last 5 years. Only 2.5% have travelled in Finland. 32.5% have travelled to other destinations in the world (see chart 2). You can see from the chart that the youngest age group travels less abroad than the older age groups. Among the age group #2 the number of trips to Europe and farther destinations increases by around 10 %. The next one, group #3 maintains almost the same percentage to Europe but travels more to farther destinations. However in every age groups Spain remains the most popular destination.

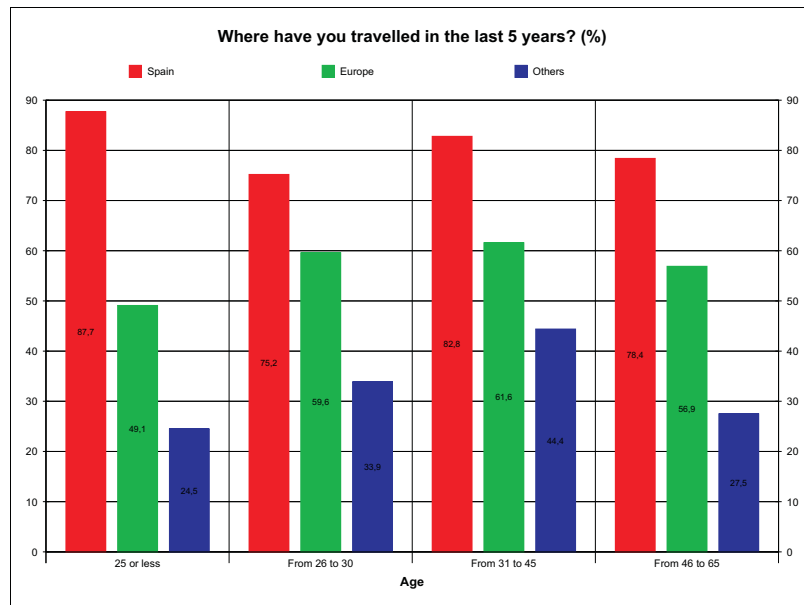


Chart 2: Destinations by place in the world

Until the age of 30 the interviewees would rather travel with friends. From 31 to 45 the significance of travelling together with family or friends is the same. From the age 46 upwards it seems to be important to travel with the family. The percentage of people who sometimes travel alone increases with the age, but is insignificant in comparison with the other variables (family and friends) (see chart 3).

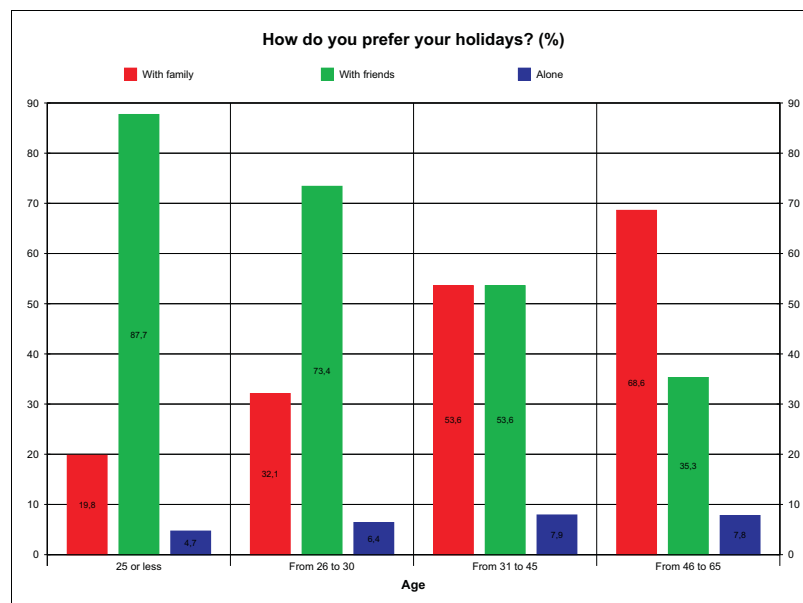


Chart 3: Company for travelling

Around 76% of the Spanish tourists contract their holidays by a travel agency. Only a minority of the interviewees book online (via the Internet) or directly at destination (see chart 4).

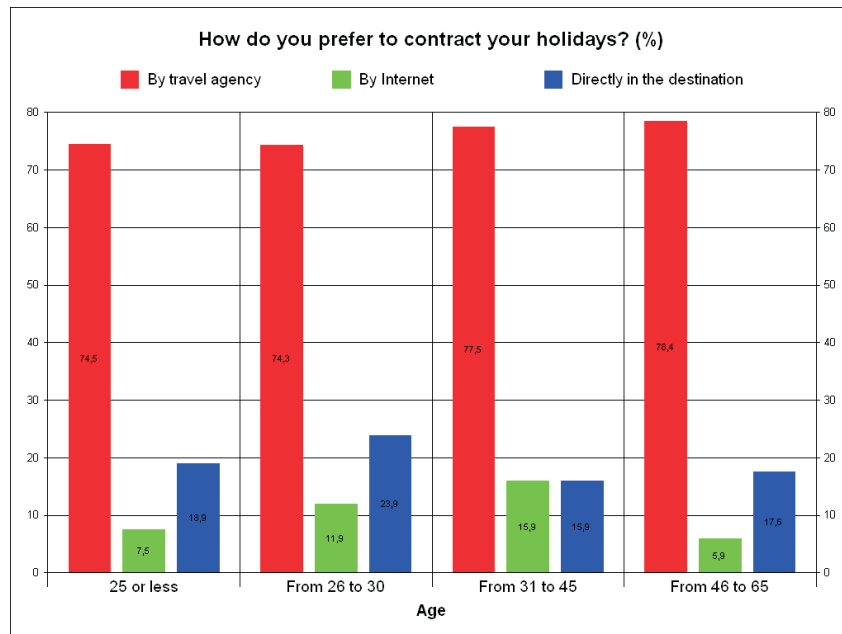


Chart 4:Way to contract the holidays

According to the results, the most valuable aspects during the holidays among all age groups are **the quality of lodging facilities, cleanliness and conservation of the environment, cultural attractions and hospitality**. The quality of the lodging is clearly more important to the two oldest age groups than for the youngest one. The **security** is also an important aspect, especially for the group #4. **Complementary activities** are more important for the younger generation. The people from the third age group values also **children's activities** more than the other groups (see chart 5).

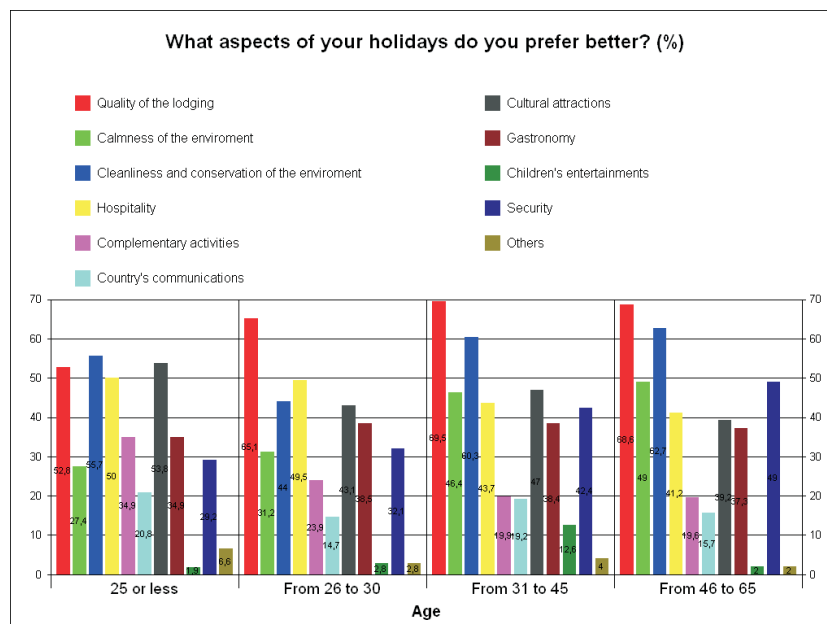


Chart 5: Most valued aspects when travelling

### 3.2 Charts about Finland as a destination

The image that the interviewed Spanish people have of Finland is connected to nature and forests, cold weather, lakes and rivers. These three main connotations are followed by cottages, Santa Claus and rally (see chart 6).

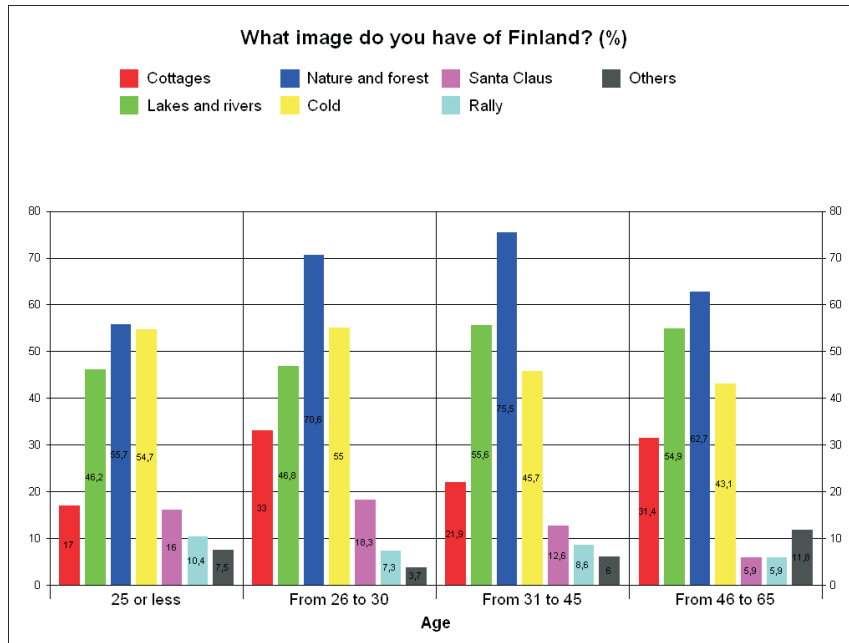


Chart 6: How Spanish tourists conceive Finland

Out of 500 interviewed individuals, 417 (83.40 %) could be seen as potential travellers to Finland (see chart 7).

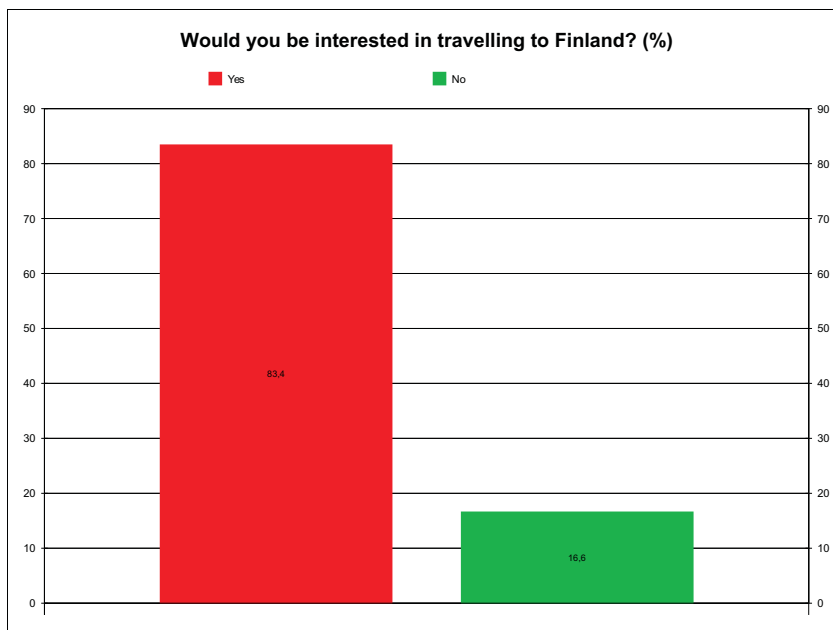


Chart 7: % of people who would consider travelling to Finland

For every age group, the best period to travel to Finland is summer. This is especially true in regard to the third group, in which the difference of willingness to travel in summer time and in Christmas time can be particularly noticed. Travelling during Christmas is just a little bit more popular than Easter holidays, especially in the group #1, where the difference is just 3 % (see chart 8). The kind of tourism the Spanish would prefer to practice in Finland would be a combination of **urban + rural tourism** (around 82%). 16% would prefer just **rural tourism** and the rest just **urban** or other kind of tourism (see chart 9).

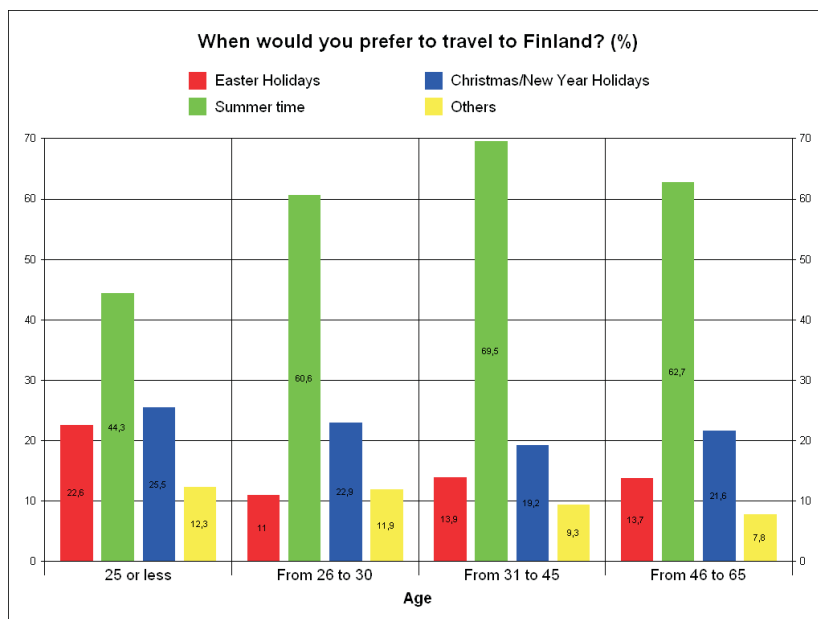


Chart 8: Period for travelling

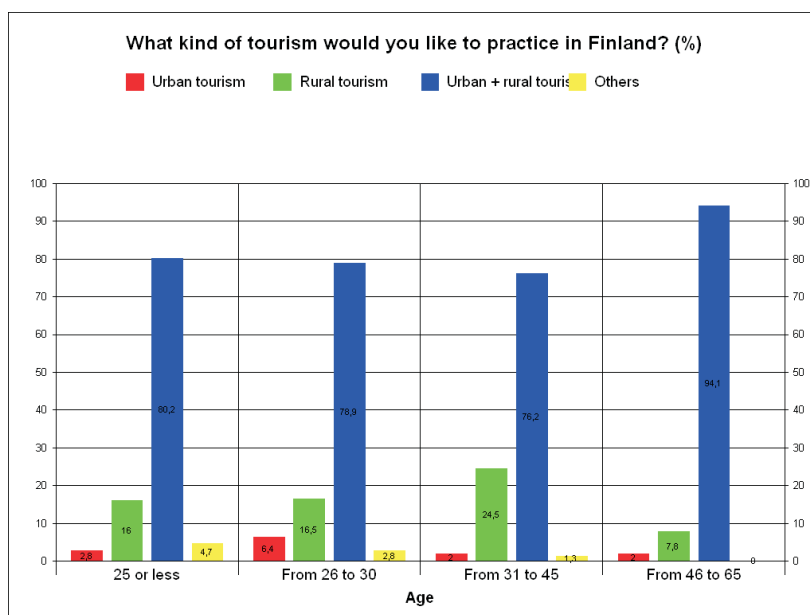


Chart 9: Kind of tourism

The most of the interviewed would like to contract **flight, car and lodging** (over 68%) (see chart 10). The service they would prefer would be **bed and breakfast** and **half board** ( see chart 11).

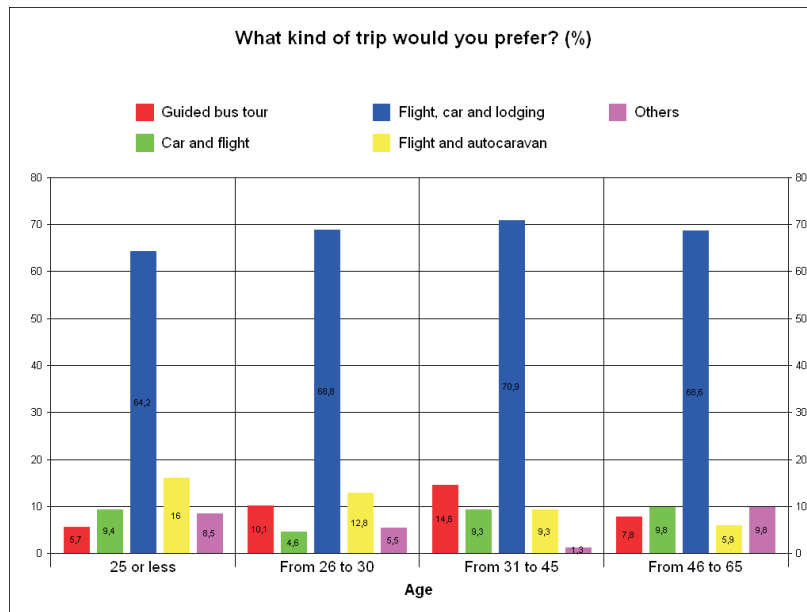


Chart 10: Kind of trip

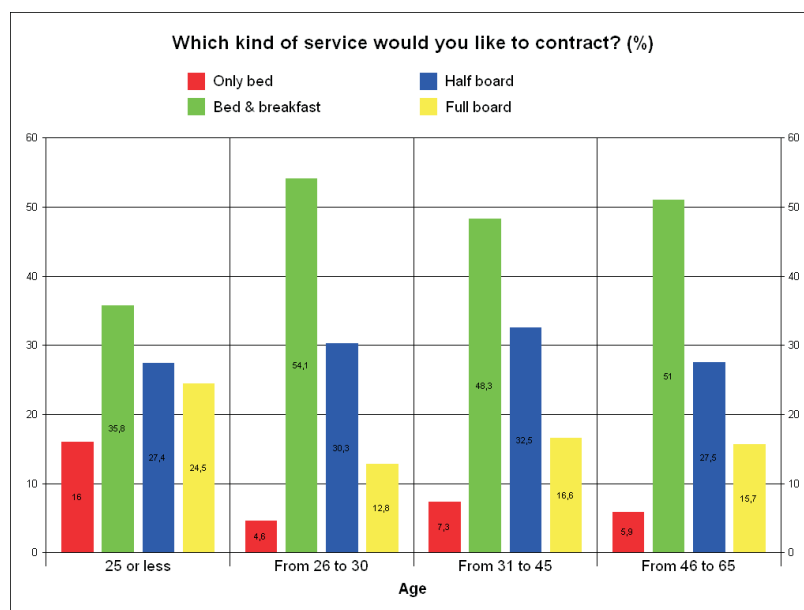


Chart 11: Kind of service

According to our questionnaire the favourite lodging option for a Spanish tourist is a **private cottage** or **holiday villages**. The average of the price the would pay for renting a cottage for one week it would be 428 €. Specially the first and the second age group prefer a private cottage, for the last two groups the holiday village is almost as important. The third option chosen was **aitta** (the meaning was explained in the questionnaire). The interviewees did not seem very interested in **farm holidays** (see chart 12).

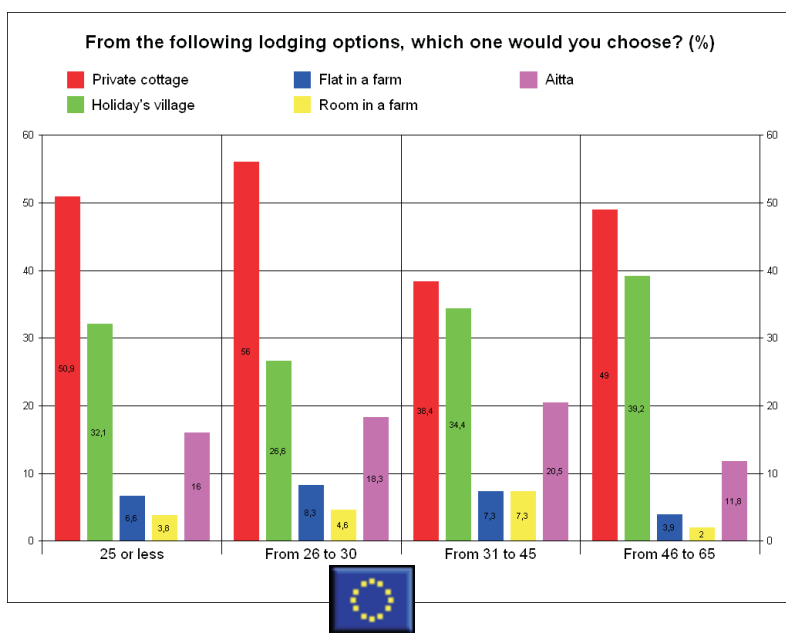


Chart 12: Kind of accommodation

For all the age groups it is important to find a **toilet inside the cottage**, the second option chosen in all groups is a **fireplace**, and then **sauna**, **private beach**, and **rowing boat or canoe**. The last is not so important for the fourth age group. About the household appliances the order of importance would be: TV, washing machine, microwave and dishwasher (see chart 13).

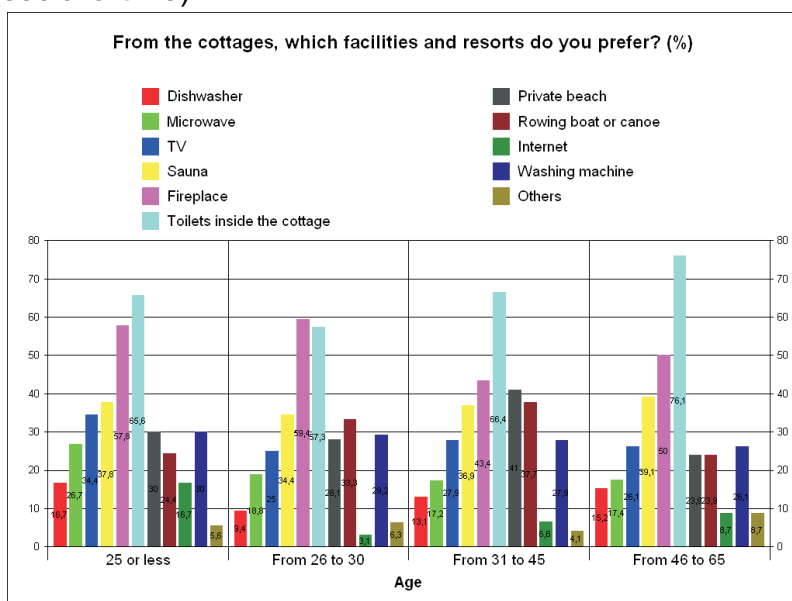


Chart 13: Cottage's facilities and resorts preferred

Note 1: The price is just for the cottage and it is not per person.

People who chose “aitta” for their favourite lodging, valued better the **meals, rowing boat or canoe, sauna** and **private beach**. The meals are especially important for the oldest age group and they don't either see a rowing boat so necessary for the vacations as the younger groups. (see chart 14).

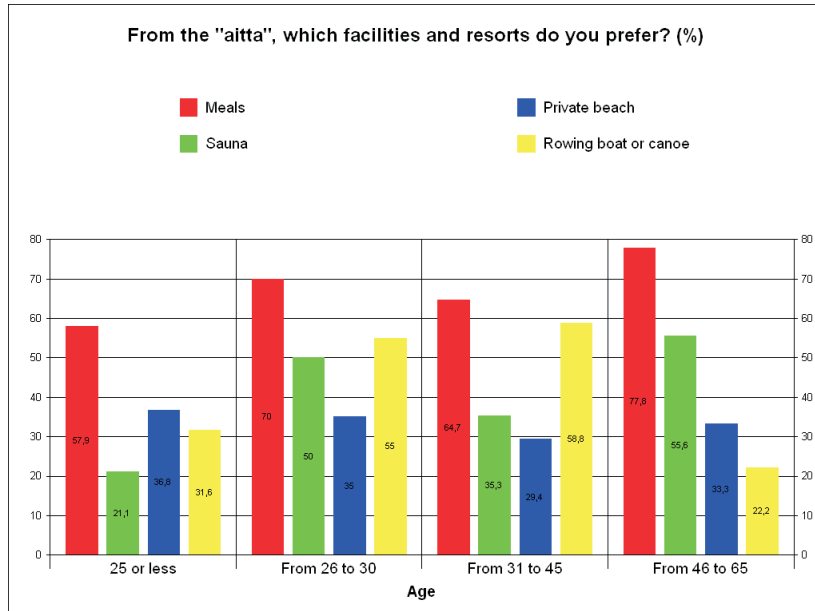


Chart 14: Aitta's facilities and resorts preferred

The Spanish tourist are very interested in the gastronomy, and according to our questionnaire they would like to know also finnish gastronomy. (see chart 15).

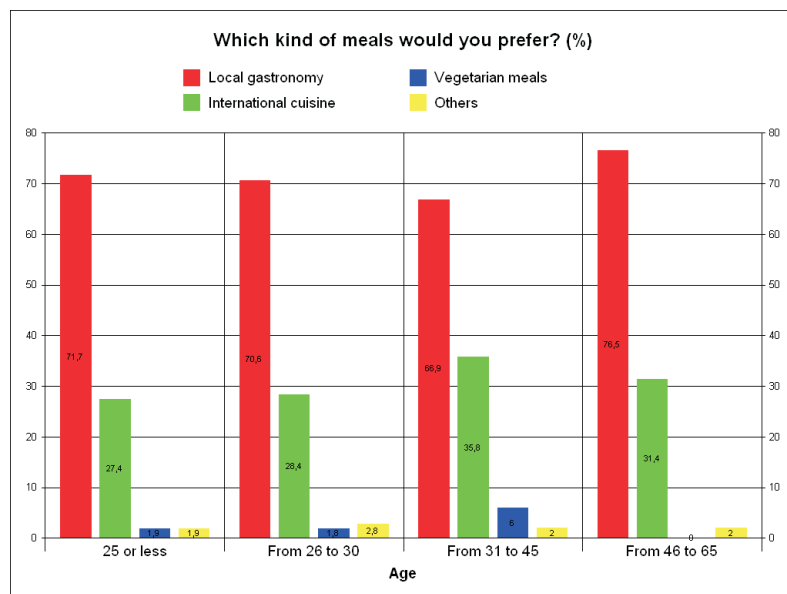


Chart 15: Kind of meals

The majority of all the age groups (68.1%) would find it uncomfortable to share the toilets with the other tourists. (see chart 16).

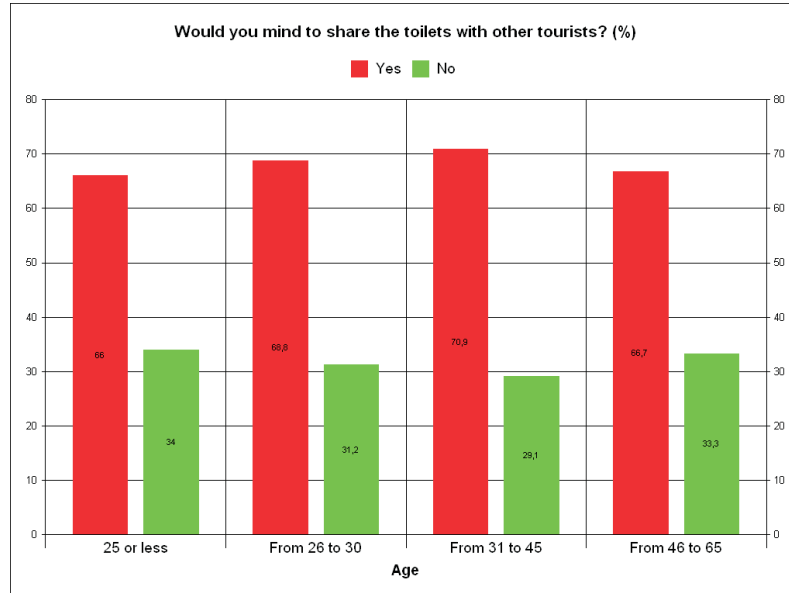


Chart 16: Toilets shared

The favourite complementary activities which the Spanish would be interested in are **lake cruises, dogsledge tour** and **canoe routes**. After these would come **snowmobile tour, museums, and buying local handcraft** (see chart 17).

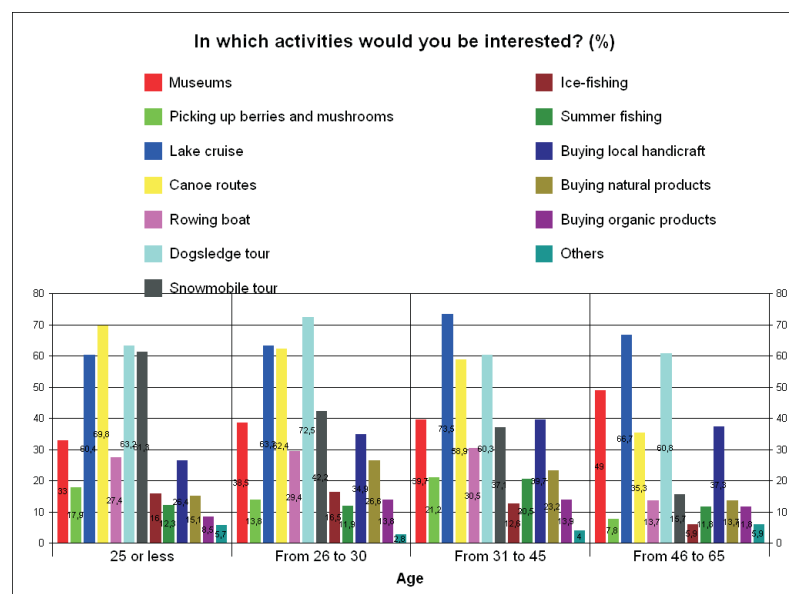


Chart 17: Touristic activities

The interest for **sport activities** decreases when the age rises. Group #1 finds more interesting exciting sports like water scootering, diving in lakes, skating and water skiing. When the age rises the people prefer other kinds of sports like cycling, trekking or snowraquets excursions (see chart 18). About the **canoe tours**, groups #1 and #2 would prefer several days multiactivity tours. For the third group the interest for this multiactivity tour is still high but the last one would prefer few hours guided tour in the lakes. For all the groups the interest for the lakes is higher than the interest for the rivers (see chart 19).

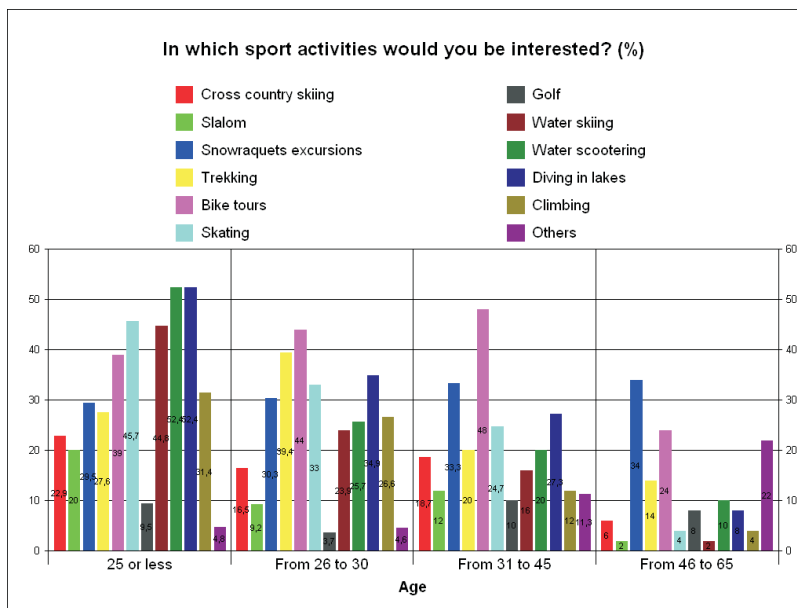


Chart 18: Sport activities

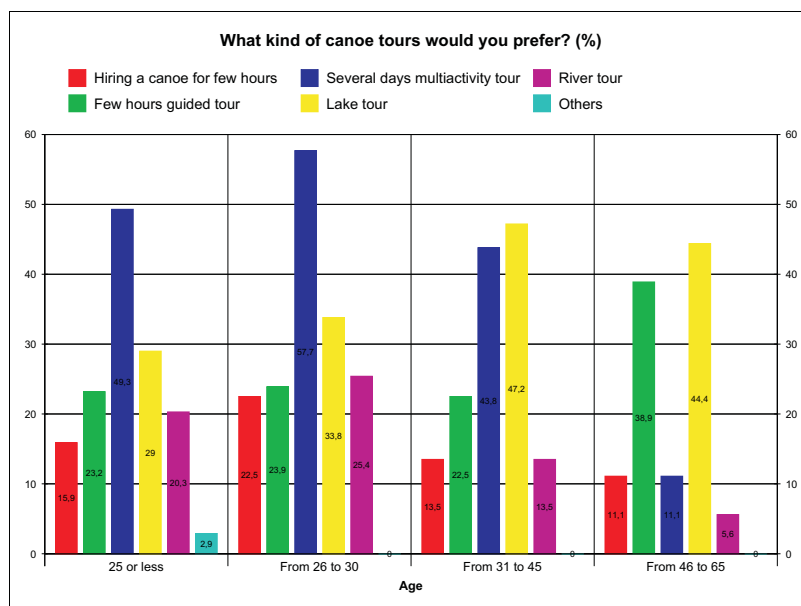


Chart 19: Kind of canoe's tours

To contract the complementary activities, half of the groups #1 and #4 would like to do it **beforehand in Spain** and the other half **directly in Finland**. Almost the 60 % of the individuals in the groups 2 and 3 would prefer to do it directly in Finland (see chart 20).

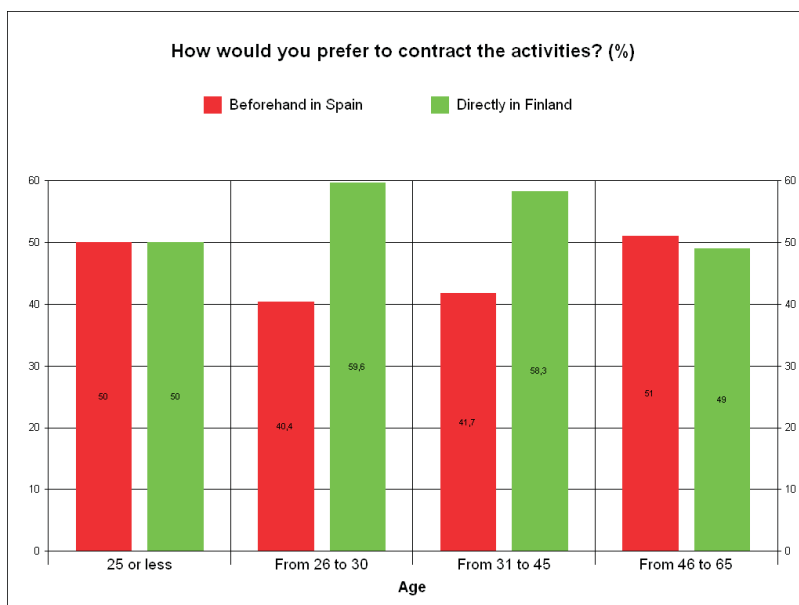


Chart 20: When and where contract the activities

For the majority of the Spanish the language is not a barrier to enjoy their holidays (see chart 21) but they would prefer anyway to have a special telephone service offered in Spanish to help them in case of emergencies (See chart 22).

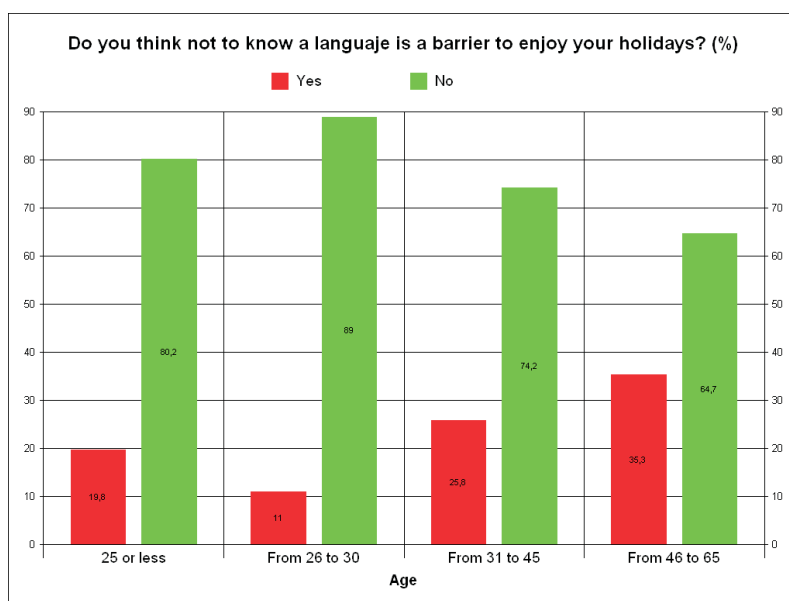


Chart 21: The language as a barrier

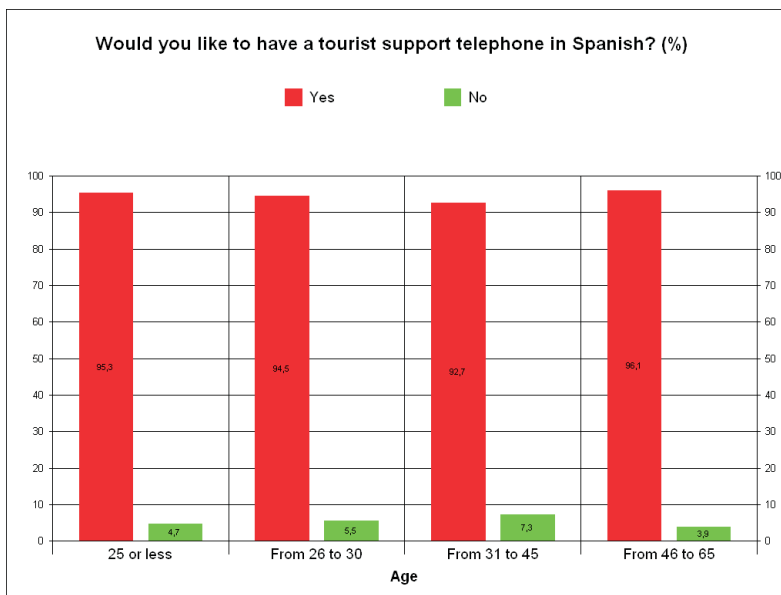


Chart 22: Telephone support

#### 4.- Conclusion

Spain is the 14<sup>th</sup> in the ranking of the number of the nights spent at accommodations facilities during 2001. In the past few years the number of Spanish tourists who have chosen Finland as a destination for their holidays has risen. Through the period 1997-2001 the number of nights spent by Spanish in Finland has increased over 27%, being the country which more has increased after Great Britain (33%) and Norway (29%).(Source: Border Interview Survey - Statistics Finland / Finnish Tourist Board).

In this research, over 83 % of the surveyed people have shown their interest in travelling to Finland (see chart 7).

An increasing number of Spanish people spend their holiday time abroad. Spanish travel agencies have traditionally sold bus tours around Europe as well as other products like stays in Europe and other destinations of the world. The most visited European destinations by Spanish tourists are France, England, Portugal, Italy and Germany. When travelling outside Europe, Spanish people are very keen on taking a trip to the United States and some countries of Latin America. (see Anex pag.18).

Today's tourists seek new destinations which provide them with new, interesting attractions. Consequently, Spanish travel agencies are working in order to find these destinations and satisfy this new demand.

Doing this research we could see how some travel agencies have already discovered the potential of Finland. These travel agencies, located in the very center of Madrid, were already selling trips to Finland and promoting the destination with big advertisements and posters.

This research not only provides us with a clear idea of what kind of tourism the Spanish would like to practice in Finland, including very relevant data for tour operators, but it could also be of great help to travel agencies, and cottage owners and service suppliers. This research gives some clues to improve the touristic facilities and the service as well as their commercialisation.

Some of these ideas could be:

- Create packages that include the flight, a couple of nights in Helsinki, car and cottage in the country side.
- There are no skating products or they are not well promoted, and specially young people demand it. Spanish people couldn't imagine that is so easy and safe to skate long distances in Finland.
- Negotiate with Spanish tour operators or travel agencies to sell the products directly from Spain.
- Try to change the image of cold winter into enjoyable and different winter in order to promote the tourism in that season (notice the interest in snowmobiles and dogsledges, see chart 17).

- Translate the tour operators' web pages into Spanish. Nowadays, Spanish people still prefer to contract the trip through the Spanish travel agencies and use the Internet only as a source of information. However, with the internet growing increasingly popular, this trend is likely to undergo very deep changes. What's more, within a few years, when the technology will enable more secure money transfer through the Net, there is great probability that the Spanish will be more interested in booking their trips online and that Finnish tour operators and travel agencies will be able to sell their products on the Spanish market without any intermediaries. In that case, the Finnish travel agencies wouldn't have to pay the commissions to the Spanish agencies.

- Offer flush toilets (instead of letrines) inside the cottages. Spanish tourists do not like to share the toilets with other tourists unless these are people of their own group (like relatives or friends). This aspect is quite important for Spanish tourist because they are used to hotels' toilets.

- Since many Spanish do not usually speak any foreign language, they would appreciate finding brochures in Spanish inside the cottages describing the area, what to do or buy. This would help to promote small businesses of the area, improving the local economies and to make the Spanish tourists feel more comfortable.

It is high time that every institution, whether it be public or private, cooperated in order to meet the expectations of the Spanish market. The trade of Finnish tourism in Spain is still at its primary stage and it is bound to develop in the long run if every agent puts its good will and knowledge into it.

## 5.- ANEX: Others<sup>1</sup>

This anex is to show the point “others” of the charts.

### Chart 2: Destinations by place in the world

Europe:	France	24 %	
	U.K.	12 %	
	Portugal	11 %	
	Italy	9 %	
	Germany	6 %	
	Holland	4,7%	
	Austria	4,4%	
	Czechoslovakia	3,7%	
	Belgium	3%	
	Switzerland	3%	
	Greece	2,9%	
	<b>Finland</b>	<b>2.5%</b>	
	Denmark	2.3%	
Other countries, around 1% each	11.5%	(Sweden, Poland, Estonia, Andorra, Luxemburgo, Bosnia- Herz., Slovenia, Yugoslavia, Ireland, Croatia, Iceland, Latvia)	
Other Destination the three first)	Latin America + Caribe	44%	(Mexico, Cuba and Ar- gentina
	USA	16%	
	Tunesia	5.1%	
	Morocco	4.7%	
	Egypt	3.6%	
	Turkey	3.1%	
	China	2.4%	
	Canada	2.3%	
	Japan	1.6%	
	India	1.6%	
	Other countries	15.6%	

### Chart 5: Aspects better valued during the holidays.

Good price for the package and nitghlife.

### Chart 6: Image of Finland For Spanish tourists.

Fishing, Alvar Aalto, architecture, Salmon, Midnight Sun, reindeers, Sibelius, firends.

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Note 1: Some people answered “others” when they are not interested in that question or when they do not know what to answer.

Note 2: When the number of repetitions of a topic given in “others” is so low, we do not show the percentages

#### Chart 8: Period for travelling

Anytime	33.3%
Winter	27.8%
September	11.3%
Longweekends	11.1%
October	5.5 %
May	5.5%
Low season	5.5%

#### Chart 9: Kind of Tourism

Sport and adventure tourism, winter tourism

#### Chart 10: Kind of trip

Only lodging, flight and lodging, only autocaravan, only car, Interrail

#### Chart 13: cottage's facilities and resorts preferred

Kitchen, cleaning service, decoration, gym.

#### Chart 15: Kind of meals

Combination of local and international cuisine.

#### Charts 17 and 18: Activities

Dancing, tradition and culture, music, sailing, hiking, Natural parks, Rally, indoor sports.