

Conducting Marketing Research in

# SPAIN



Spain is a key European research market essential for taking the pulse of southern Europe. According to the 2019 ESOMAR Global Market Research Report, Spain ranks 5th in Europe for research turnover with 563 million US\$ in 2018 and 9th in the global industry. 96% of market research turnover is domestic with only 4% being subcontracted outside Spain. 79% of research business in Spain is from domestic clients with the remaining 21% coming from international sources.

## The Essentials

**OFFICIAL NAME:** Kingdom of Spain

**FORM OF GOVERNMENT:** Constitutional Monarchy

**CAPITAL:** Madrid

**POPULATION:** 46.7 million (2019 est.)

**OFFICIAL LANGUAGE:** Spanish

**CO-OFFICIAL LANGUAGES:** Catalan, Galician, Basque, Occitan

**CURRENCY:** Euro

**GDP:** 1.3 trillion USD (2018 est.)

**AREA:** 505,990 km<sup>2</sup> (195,360 square miles)

## Economic Position

Spain is the world's 13th largest economy and the 5th largest in the European Union, and it continues to deliver robust and balanced growth. At the time of publishing, the Bank of Spain has improved its 2019 growth outlook for the Spanish economy, raising it to 2.4% from the 2.2% it predicted in March. Despite a global slow-down, the Spanish economy has outperformed expectations on the back of public spending and strong internal demand. Record tourism and export levels, coupled with revived domestic consumption, helped drive Spain's economic recovery. Despite this, economists forecast a slight slow-down of growth at 1.9% by 2020.

Spain's exports are mostly made up of manufactured goods. More than half of the country's total exports are ships, cars, semi-finished goods, pharmaceuticals, and electronic devices. Also important is Spain's position as the world's third-largest exporter of fruits, vegetables, and wine. Spain is home to numerous multinationals, including five of the world's largest construction companies, and Europe's second-largest phone company. Tourism is a vital sector of Spain's economy contributing 1 Euro to every 7 Euros. In 2017, Spain was recorded as the second most visited country in the world, welcoming 82 million tourists. Spain's vibrant economy and growing digital industry are also increasingly important factors in furthering US-Spain bilateral trade and investment.

## Resesarch Population

Spain's population grew by 276,000 people in 2018 to nearly 47 million, and in July 2019 the national statistics agency reported the fastest annual increase since 2009.

At 91/km<sup>2</sup> (235/sq. mile) Spain's population density is lower than most Western European countries. Population distribution across the country is unequal and most populated areas are around the coast, Madrid being the exception. Just 20% of the population live in rural towns away from the larger metro areas. Not only are urban areas expanding throughout the country, but many people are relocating to the cities. Spain has quite a few major cities with substantial populations. There are 88 cities with populations that fall between 100,000 and 1,000,000, and an impressive 707 towns spread among Spain's 50 provinces with populations exceeding 10,000.

## Immigration and Migration

A decade ago, Spain's economic crisis led to hundreds of thousands of people leaving the country. Today, its population has reached its highest-ever level. Strong economic recovery and the strengthening labor market has led to a fall in emigration by Spaniards and increased immigration. Immigration has been both from traditional sources in Latin America and Morocco as well as other European countries.

Native Spaniards represent 88% of the total population. Large numbers of immigrants make up 12% of the population. Immigration is mainly from:

- Latin America (39%)
- North Africa (16%)
- Eastern Europe (15%)
- Sub-Saharan Africa (4%)

In 2008, Spain granted citizenship to over 84,00 persons, mostly to people from Ecuador, Colombia, and Morocco. A significant portion of foreign residents in Spain is also derived from European countries, primarily Britain, France, Germany, The Netherlands, and Norway. Residency is primarily on the Mediterranean coast and the Balearic islands, where many choose to retire or telecommute.

#### Populations of these major research cities in order of demand at BDI Research

City	Autonomous Community	Approx. Population in 2019
Madrid	Madrid	3.2 million
Barcelona	Catalonia	1.6 million
Valencia	Valencia	814,000
Seville	Andalucía	702,000
Bilbao	Basque Country	355,00

Spain is a fascinating country to research because of its myriad of languages, traditions, social behavior, and gastronomy.

#### Madrid

Madrid, the capital of Spain, is one of Europe's largest financial centers and the largest in Spain. The center of government, finance, insurance and research, tourism, and the city's position as Spain's transportation hub all contribute to its prosperity. Madrid is the most populous city of Spain with 3.3 million inhabitants and a metropolitan area population of approximately 6.5 million. It is also the third-largest city in the EU behind London and Berlin. Madrid is the leading economic hub of Southern Europe due to its economic output, high standard of living, and market size and has the third-largest GDP in the EU. It hosts head offices of the major Spanish companies. Although Madrid continues to be Spain's second industrial center after Barcelona, the service sector has an increasing impact on the economy. Madrid's influence in politics, entertainment, media, education, environment, fashion, science, culture, sports, and arts contributes to its status as a major global cities and a leading market research market. For market research, it best to test at least in Madrid and Barcelona, which tend to reveal the main pulse of the country.

## Barcelona

Barcelona is the capital and largest city of the autonomous community of Catalonia, as well as the second-most populous municipality of Spain. Although the city population is 1.6 million, its urban area extends to 4.8 million people including numerous neighboring municipalities within the Province of Barcelona. It is Spain's major Mediterranean port and commercial center and is famed for its individuality, cultural interest, and physical beauty. Chemicals, pharmaceuticals, automobiles, electronics, and appliance manufacturing are among Barcelona's leading industries. The Barcelona metropolitan area comprises over 66% of the people of Catalonia, one of the more prosperous regions in Europe and the fourth richest region per capita in Spain (16% more than the EU average). The greater Barcelona metropolitan area had a GDP of 44% higher than the EU average, positioning it the 4th most economically powerful city by gross GDP in the EU. Barcelona is a critical market to research with its own particular culture, views, and behaviors. Generally speaking, Barcelona is the best city in which to test new products or innovations. It represents the avant-garde cutting-edge, compared to Madrid, which is more linked to traditionalism. South and North are opposite poles due to historical reasons and a completely different climatology.

## Valencia

Valencia is the capital of both Valencia province and the autonomous community of Valencia. Valencia has much evolved over the last decade, with a clear impact in its economy. Valencia's port is vital for the export of the region's agricultural produce and manufactured items, including furniture, glazed tiles and ceramics, automobiles, textiles, and iron products. Services, including tourism, are also crucial to the economy.

## Seville

Seville (Sevilla) is capital of the province of Seville, in the autonomous community of Andalusia in southern Spain. It is the fourth largest in Spain. The inland port's principal exports are wines, fruit, olives, minerals, and cork. Imports include oil, coal, and metallurgical products. Industries include tobacco, armaments, porcelain, aircraft parts, chemical products, and agricultural machinery. Commerce, services, and tourism are other economic strengths.

## Bilbao

Bilbao, another important Spanish port city, is the capital of Vizcaya province in the autonomous community of the Basque Country in northern Spain. The Bilbao metropolitan area has around 1 million inhabitants, positioning it as one of the most populous metropolitan areas in northern Spain and combined with the population of Greater Bilbao it is the fifth-largest urban area in Spain. Bilbao produces industrial and transport equipment, aeronautical equipment, automobiles, chemicals, tools, tires, and paper. Services and tourism have grown in importance.

## Quantitative Research

According to the 2019 ESOMAR Global Market Research Report. 86% of research conducted in Spain is Quantitative. Online surveys have increasing importance as a result in the rapid improvement in digital communication, though the traditional quantitative methodologies such as CATI, WAPI or the face-to-face HUTs, in hall tests, car clinics, POS observation and interviewing are still in place according to the requirements of some specific targets/studies.

These statistics shared by the Hootsuite Global Digital Yearbook underscore how internet and mobile penetration have enabled high-quality and high-response online research. Also, in recent years, we have certainly seen a marked increase in the number of surveys and online qualitative studies we conduct.



Internet penetration is 93% of the population



92% use the internet every day



60% are active social media users



52% are mobile social media users



Number of mobile connections is over 54 million (117% of the population)



85% of mobile connections are broadband



Average speed of mobile internet connection 34 MBPS



Year on year change in average mobile connection speed is +8.9%



Average speed of fixed internet connection 102 MBPS



Year on year change in average fixed connection speed is +56%

Given the prominence of mobile usage, surveys must be optimized for the mobile user, particularly for those in the south of Spain who tend to spend more time out of doors.

## Qualitative Research

According to the ESOMAR Report. Qualitative methods represent 12% of research conducted in Spain with 10% representing focus groups and IDIs and 2% online qual.

Generally speaking, in focus groups in Spain, respondents are very talkative and very creative, so they tend to generate many insights. Even a 6-person focus group can be very productive. Groups of over 8 participants, however, can be counter-productive, as many Spaniards cannot bear to cut a conversation short. It is common and acceptable for people to interrupt and talk over one another, as people get excited about a conversation. Such groups can be challenging to moderate and cover all points in the discussion guide. Qualitative show rates tend to be quite high.

## Laws that Impact Marketing Research in Spain

Since May, 2018, the **General Data Protection Regulation (GDPR)** has been in place in Europe. GDPR in basic terms relates to ‘informational self-determination’ and the privacy surrounding the processing of personal data. For marketing research, this has a direct impact on location, storage duration, content of stored data, and the disclosure of personal data. GDPR provides increased respondent rights. Here are some considerations for your studies:

- Identifiable personal data are prohibited from being shared with project sponsors. PII collected by interview, observation, survey, recording, or any other means may only be shared with researchers for direct study-related needs. This excludes internal use by the sponsor or another third party (including internal departments).
- Usually, the data collection provider conducting the recruitment will have gathered the consent and have all contact details. This provider will care for the subject rights, in collaboration with the sponsor’s market researcher. • Consent could be given in written or electronic form with delivering transparent information to the project as the GDPR requires.
- If an end client wishes to provide a customer list, they need to have consent for usage from their customers. Moreover, the end client will be seen as Controller with all risks and duties according to EU GDPR regulations in such cases.
- Article 8 specific requirements regarding consent for the processing of personal data of children. The general rule provides for a parental consent requirement for all youth under 16 years old in situations where information services are offered directly to them. However, Member States may choose to deviate from this, and Spain lowered this age threshold to 14. (At BDI, however, we apply the general EU GDPR standard and ask for parental consent to all youth under 16 years.)
- Businesses that process special category data in other member states need to consider any derogations made to Article 9 in the country in which they operate, as there may be differences. For example, Spain has removed consent as an exemption from Article 9(2)(a) where the personal data falls under one of the following categories: ideological, trade union membership, sex, religion, belief or ethnic origin. Where consent is obtained, it must be combined with an additional ground under Article 9(2) in order for the controller successfully to show that data is being processed lawfully.

Member states must implement their own penalties for breaches of the GDPR (other than the penalties in Article 84). Some countries, including Spain, have chosen only to implement administrative penalties, in contrast to Germany, Italy, and the UK, that have created criminal offenses for breaches.

That said, remaining compliant within GDPR is essential and, requires a solid understanding of legal responsibilities and requires data collection companies to have taken action in adjusting standard operation procedures to ensure compliance. A good data collection provider will be able to clearly demonstrate its processes for compliance and consult with you at the feasibility stage of your project on the particulars of your study in relation to GDPR and other laws. Ask for the name of the Data Protection Officer.

Spain is a country where the culture in data protection matters is firmly rooted in previous laws. Since December 2018, **The LOPD or Law 3/2018** on data protection and digital rights further expands on the rules of the GDPR and establishes data protection as a fundamental right under the Spanish Constitution.

Learn More About How  
Schlesinger Group Manages GDPR



## ¿Hablas español? Or Parles espanyol? Languages of Research in Spain

Spain is legally multilingual. The constitution also provides that all other Spanish languages be official in their respective autonomous communities. Spanish is recognized in the constitution as Castilian (Castellano) and is the official language of the entire country.

As a percentage of the general population, Castilian is spoken as a first or second language by 99%, Basque is spoken by 2%, Catalan by 19% and Galician by 5% of all Spaniards.

Studies in Spain are usually conducted in Spanish, especially for international clients with simultaneous translation. For those projects in Catalonia without any client involvement and bilingual Catalan-Spanish moderator, respondents would be asked their preferences. The same applies to CATI interviews. Studies in the Basque and Galician are rare, but if these locations are chosen for research, then interviews would typically be conducted in Spanish.

Bypass attempting interviews in English. It is important to note that in general, the English proficiency of Spaniards is relatively low. Leveraging local language moderators allows for respondents to feel more comfortable and at ease. People communicate differently and open up more, allowing for a richness of feedback and insights that you would not otherwise gather.

## Don't Get Lost in Translation

In any foreign language market research, there can be risks around translation and interpretation of your research questions. The safest approach is translation-retranslation – Prepare your question in your language, then have it translated. Have a second translator return the question into the original language. This technique can often help highlight potential miscommunication.

## Bids and Contracts

It would seem to be the accepted norm in marketing research that business is mostly conducted without a contract. However, when employing services internationally, do use good judgment and ask for terms and conditions, as service standards can vary. It is worthwhile to confirm verbal conversations in writing to avoid assumptions and possible miscommunications over the telephone. Out of politeness, suppliers may not want to admit your brief is not clear to them. This can lead to a provider bidding on the high side if the supplier is not fully confident he/she has fully understood the brief. Receiving a brief or update in writing allows time for each party to process and check information at all stages of a study, increasing the likelihood of favorable outcomes.

## Managing International Expectations

Employees have strong employment rights, and the Spanish take their holidays and working hours seriously. When selecting your agency or fieldwork company, if fast responses are important to you, it pays to gain an understanding of their flexibility towards international researchers. For example, whether they work on Spanish holidays which are not also US holidays, or what times of day they work.

## Research Timing and Public Holidays

Spain has 14 public holidays each year. Two of these vary depending on the local municipality. Employees are typically entitled to 23 days of paid holiday each year, usually taken in July, August or September, with August being the most popular month.

The Spanish are very protective of their personal time and make the most of their 'puentes' ('bridges'). When a public holiday falls on a Tuesday or Thursday, many Spaniards take either Monday or Friday as vacation, to create a four-day weekend. It is advisable to avoid conducting research during long weekends or days close to a holiday in Spain. Qualitative research on Fridays, specifically FGs in the afternoon would also be challenging, especially in summer, given that many people leave town early to spend the weekend in the countryside.

The dates of the national public and religious holidays (bank holiday) are as follows:

**1st January**

New Year

**6th January**

Epiphany

**March / April**

Good Friday

**March / April**

Easter Monday (Regional)

**1st May**

Labour Day

**15th August**

Day of the Assumption

**12th October**

National Holiday of Spain

**1st November**

All Saints Day

**6th December**

Spanish Constitution Day

**8th December**

Immaculate Conception

**25th December**

Christmas Day

## How Working Hours Impact In-Person Study Schedules

### The Long Lunch

The high cultural importance and quality of Mediterranean food, together with traditional family meal routines, lead the Spanish to have a real break at lunchtime, and the typical Spanish working day tends to be from around 9am to 2pm and from 4pm until 7pm.

Cities no longer enjoy Siesta and a busy urban culture in Spain is comparable to most European countries. The Siesta may still apply in southern cities such as Seville or Malaga where it gets so hot in the summer that the city shuts down for 3-4 hours until late afternoon when it is slightly cooler.

### How does this impact recruitment and scheduling of in-person research?

Sessions can be successfully scheduled during lunch breaks between 2pm-4pm. Part-time workers and civil servants finish work at around 2pm or 3pm, so they can be researched starting around that time.

HCPs generally work in public hospitals from 8am until 2pm, then have a 1-hour lunch break, and then tend to work in private practice (to supplement their income) from 3pm onwards, so specialists should be scheduled from 3pm until 10pm approx. (which means 6 x 60 min IDIs per day).

In the mornings, only PCPs or nurses can be interviewed, as they have more flexibility with their schedules, but until 1.30pm, since they probably start their shifts at 2pm.

Office workers theoretically leave between 6pm and 7pm. Store clerks leave later, between 8pm and 9pm. The optimal time to schedule a B2B or low-incidence B2C group is 7pm onwards.

Moderators expect a 30-minute break in between sessions (regardless of what time of the day that is) since sessions can last longer than planned due to respondents being very talkative in general. Very few moderators or interpreters accept to work for more than 6 hours (plus breaks) of moderation/interpretation per day, that is, 6 x 60 min IDIs or 3 x 2h FGs.

The timing for a day and eve of IDIs/focus groups should be worked from 10pm end-time backwards, assuming that there will be very little availability in the morning, which in Spain means from 9am to 2pm.

## Keeping Time

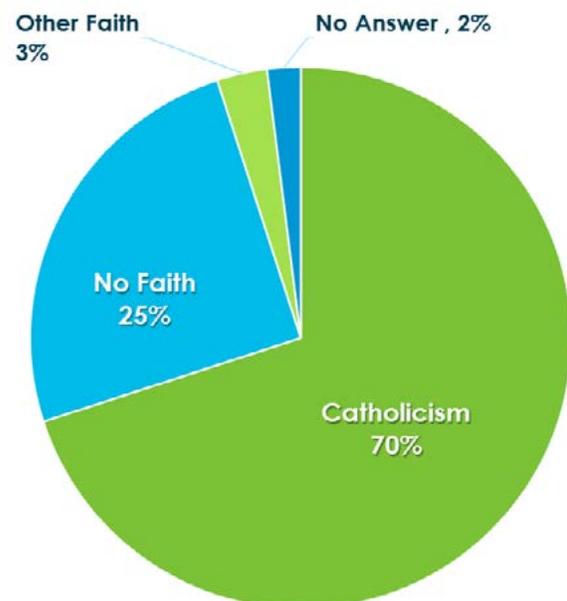
It's essential to become familiar with Spanish norms regarding date and time to ensure your project runs smoothly. Both verbal and written reference to the 24-hour clock is standard in Spain, so it makes sense to become familiar with it.

Spain is in the Central European Time zone and European Time during the winter months. It is important to note that there is usually a 2-week difference between the US and Europe's start and end dates for daylight savings time. When planning, using Microsoft Outlook calendar, which accounts for this difference, can help avoid any confusion. On the topic of time zones, it is often easy to forget that your European provider's day is coming to an end as yours hit lunch. Remember to allow more time for collaboration and communication during common work hours. With proper awareness, the time difference can often work to your advantage with an end of day bid from the US to Spain arriving back with you by first thing next morning!

As is the case for the rest of the 'Big Five' European countries, the date format in Spain is dd/mm/yyyy. This seemingly subtle switch can be an easy pitfall when scheduling interview and appointment times. As a rule, always communicate and request communication with the name of the month spelled in full to avoid, for example, July 8th being mistakenly read as August 7th.

## Religion

Roman Catholicism is the main religion of Spain although it no longer has official status by law and most Spaniards do not regularly participate in religious services. Spanish society has become considerably more secular over recent decades. However, the influx of Latin American immigrants, who tend to be active Catholic practitioners, has aided the Catholic Church's recovery.



Religion in Spain June 2016 study by the Spanish Centre for Sociological Research.

## Government

Spain is a constitutional monarchy, with a hereditary monarch as head of state and a parliament. The executive branch consists of a Council of Ministers of Spain which is presided over by the Prime Minister. The legislative branch comprises the Congress of Deputies elected by popular vote by proportional representation to serve four-year terms, a Senate with 259 seats of which 208 are directly elected, a remaining 51 administrative appointments.

Spain is one of the most decentralized countries in Europe. While sovereignty is vested in the nation as a whole through central government, power is devolved to the 17 autonomous communities. These communities exercise their right to self-government within the limits of the constitution and their autonomous statute. Autonomous communities have their own elected parliaments, governments, public administrations, budgets, and resources. Health and education systems are managed by the Spanish communities.

## Culture

Since becoming part of the EU, stereotypes around Spain are much reduced and, just like anywhere in the world, any differences can be as much individual as cultural. That said, awareness is key, so here are some considerations.

### Getting to the Point

Spain is a country of directness. Research respondents may not easily pick up on verbal subtleties or hints, so be clear and direct in your messages. The Spanish tend to be honest about their opinions and encourage the free flow of ideas. Open expressions of anger, sadness, and affection are very much the norm. People can have interactions that may appear heated due to raised voices. However, in most cases, these emotional conversations are light-hearted, and tone of voice is simply an indication of conviction, sincerity, or passion. These dynamics make for lively focus groups.

### Body Language and Gestures

- Spanish body language is among the most overt. Emphasized facial expressions, extensive use of hands, arms, and shoulders can be typical. These traits can make for rich 'voice of customer' video insights.
- The Spanish are generally comfortable with less personal space than in the US – something to consider in greetings and for interview/focus group set-up requests. Spaniards tend to stand close together when talking and may pat your arm or shoulder when making a point.
- Eye contact is among the highest, and as a moderator, eye contact is important to demonstrate your sincerity and attentiveness.
- Another common Spanish gesture is snapping the hands downward in order to emphasize a point.

### Taboos

Spanish are usually open and tolerant, but there are some issues that are best avoided in casual conversation or business encounters. These sensitive issues include discussion about the Franco regime, the Spanish Civil War, partisan politics, religion, conflicts between regions of Spain (notably Basque, Catalan, and Gibraltar). For some, Bullfighting is a revered art form, for others, it is a cruel sport. Either way, it is in your best interest to refrain from airing any views.

## Local Nationalism

The topic of national identity is sensitive in Spain, as there are large points of difference within the country and Spain probably has the most internal variation in Europe. In places such as Madrid and Catalonia, for many people, affiliation to local identity can hold more importance than national identity. Local nationalism has been most recently demonstrated in the developments surrounding the independence of Catalonia, Spain's most distinctive autonomous community. Many of the population claim to feel 'Catalonian', rather than 'Spanish' and it is more typical to see the regional flag in public than the national flag. There has been an ongoing political debate around the granting of independence. In 2017, the regional government held a referendum in which less than half of the population participated, but in which 90% of participants voted for independence. Following this result, the Catalanian government declared independence. This was deemed illegal by the constitutional court and mass protests, and political upheaval followed. The bid for independence has become the most significant political challenge facing the country in decades.

## Social Interaction

If you are having meals with colleagues or even B2B respondents, lunch, rather than dinner, is usually the best time for a 'business' meal, beginning between 1pm and 2pm. Breakfast meetings are not widespread and are never scheduled before 8.30am.

Welcome topics of conversation include discussion about your country, places you have visited (particularly in Spain), Spanish art and architecture, Spanish traditions, such as wines and family. Sport is also a popular topic and football is very popular in Spain.

The qualities appreciated in Spain are, above all, those of good character and modesty. There is little emphasis on professional experience or success. Humor plays an important role, even in business encounters, and another valued characteristic is the ability to be amusing and entertaining.

## Use Names Correctly

Spanish people often have compound first names, for instance, José-Luis. The concept of a middle name doesn't exist in Spanish naming conventions, and the first two names are a compound first name and should be used as such.

In terms of surnames, there are also usually two consisting of the father's first surname followed by the mother's maiden name. Use both unless your colleague or respondent lets you know clearly that they only use the one name. When addressing a client or respondent by their surname in Spain, as a general rule, use their paternal surname. (As in Spanish culture, women do not change their name when they marry, so usually, a mother, father, and children in one family will all have different surnames.)

## Traveling in Spain for Research

Spain boasts the most extensive high-speed rail network in Europe and, on average, the fastest in the world and the second most punctual. The AVE (Alta Velocidad Española) train makes travel between research markets very easy. Madrid has high-speed train connections with 27 cities. A train ride from Barcelona to Madrid covers some 311 miles in just 2hrs 40 minutes, while a train from Madrid to Seville takes around the same time.

### Tipping

By law, a service charge is included in the bill in Spanish restaurants, bars, and hotels. It is customary, however, to round up the bill and leave small change in cafes and bars. Tipping is optional and not standard. Where the service has been exemplary, you may wish to leave an additional tip of around 5%. If you add a tip to a credit card payment, the money will go straight to the owner again, so use cash instead.

## Keep Good Company

It is important to align with partners who adhere to international market research codes, such as **ESOMAR**, **AEDEMO**, and for healthcare studies, **EphMRA**.

If you do not have first-hand experience or trusted referrals for research providers, ISO-certified companies will afford additional assurances towards international standards.



## Useful Links for Researchers

[Conducting Healthcare Marketing Research in Spain](#)

[Download our GDPR Guide](#)

[Office Holidays in Spain](#)



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BDI Research is an ISO-certified Schlesinger Group company and has been a leader in qualitative and quantitative studies across Spain and Spanish-speaking countries in consumer, healthcare and B2B markets for over 25 years.

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