

CHINESE MARKET SEGMENT: HIGH SPENDING FITS

Opportunities and Challenges for Nordic Destinations

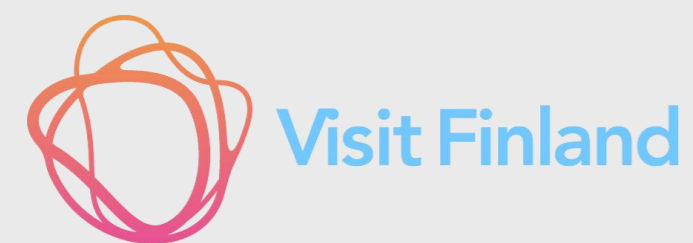
May 2018



HOW TO GET SUSTAINABLE TOURISM FROM CHINA

Long Haul Tourism Analysis is a joint project between the Nordic DMOs – Innovation Norway, Promote Iceland, Visit Denmark, Visit Finland and Visit Sweden – as well as the DMOs of the Nordic self-governing regions – Visit Faroe Islands, Visit Greenland and Visit Åland (hereinafter “Nordic DMOs”). This joint project is financed by the Nordic DMOs and by the Nordic Council of Ministers.

The main purpose is to provide an in-depth understanding of the target group of High Spending FITs from China, and make recommendations accordingly in brand building, product development, marketing strategy and marketing action plans in order to achieve sustainable tourism growth from China.



High Spending FITS Market Segment

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1. Introduction

COTRI
ASAP+
Project background

2. Setting the Scene

High Spending FITs
Market overview

3. Data Analysis

Supply point of view
Demand perspectives
Competition analysis

4. Findings And Recommendations

Brand USPs
Marketing strategy and action plan
Product development

5. Q & A



1. INTRODUCTION

1. INTRODUCTION

- COTRI
- ASAP+
- Project background

2. SETTING THE SCENE

3. DATA ANALYSIS

4. FINDINGS AND RECOMMENDATIONS

5. Q&A



1. INTRODUCTION OF COTRI

“COTRI is the world’s leading institute for research and consulting services related to the Chinese outbound tourism market, and cooperates with all leading international and Chinese tourism organisations.” (China Daily, March 2016)

COTRI offers services around to customers around the world since 2004 as an independent institute research and consulting, led by Prof. Dr. Wolfgang Georg Arlt FRGS FRAS.

Offices are located in Hamburg/Germany and Beijing/China, with a global network of regional partners on all continents.

COTRI IN GERMANY

COTRI Headquarter
West India House
Eiffestraße 68
20537 Hamburg
Germany

COTRI IN CHINA

*21th Fl, Wangjing
Greenland
Center B Hongtai East
Street, Chaoyang District
Beijing 100102*



1. INTRODUCTION OF ASAP+



ASAP+ is a full service digital agency headquartered in Shanghai, with additional offices in Sydney and London. Our team of 150 industry professionals caters to global brands seeking to “bridge the gaps” between their digital offerings and Chinese audience.

ASAP+ connect brands to their Chinese audience by combining global brand strategy with the latest Chinese market insights.

Our client pool is focused primarily on the travel and tourism industry, with extensive experience servicing international travel destinations and destination management partners seeking to increase both the number of inbound Chinese visitors as well as individual yields in a strategic and sustainable way.

SHANGHAI:

Room 903 - 908, No.1, Building 4,
Lane 838, Huangpi Road (South),
HuangPu District, Shanghai
info@asaplus.com.cn
021-50936616

LONDON:

200 Union Street London, SE1 0LX
info.uk@asaplus.com
+44(0)7403690220

SYDNEY:

333 George St, NSW, 2000
info.au@asaplus.com.cn



1. Project Background

Long Haul Tourism Analysis

- Part of the Long Haul Tourism Analysis
- Eight Nordic DMOs
- Business Finland as coordinator
- COTRI and its partner ASAP+
- To achieve sustainable tourism growth from China

CONTENT OF THE REPORT

Defining Chinese High Spending FITs

Supply analysis

Demand analysis

Competition analysis

Findings and recommendations

BACKGROUND

- The Chinese market is gaining more importance for Nordic destinations
- Opportunities and challenges emerge
- Nordic DMOs require updated analysis
- Market segment of High Spending Free Individual Travellers (HiSpFITs)

PURPOSE

- Increase awareness of the Nordic region as a whole
- Identify multiple interesting places to combine in the same trip
- Increase sustainable tourism from China to different Nordic destinations

GOALS

- Identification of common Nordic Unique Selling Propositions (USPs) and market specific USPs in China
- Recommendations for marketing strategy and action plan in China
- Recommendations for product adaptation and development



1. Project Background

DATA SOURCE

Various sources of data have been gathered and woven into the discussion of this analysis report, including:

DATA SOURCE	SECTION IN REPORT
Nordic DMOs' marketing activities in China collected by a questionnaire	Passim
Social media items collected on Chinese travel related social media platforms for netnography analysis	Appendix A
Interviews with 20 individual Chinese HiSpFIT travellers	Appendix B
Interviews with 20 industry experts who are currently working in the field of outbound tourism businesses from China to the Nordic region	Appendix C
Itineraries collected on major Chinese OTAs' websites	Appendix D
Data collected for USPs, branding and marketing	Appendix E
Desktop research - including COTRI database, published and unpublished studies and research papers as well as materials from the extensive, daily updated, COTRI database of articles from online and offline media on a global level.	Passim



2. SETTING THE SCENE

1. INTRODUCTION

2. SETTING THE SCENE

- High Spending FITs
 - Definition
 - Market size of HiSpFITs
- Market overview
 - Departure growing
 - Destination shift
 - Spending changing
 - Visits to Europe
 - Formation of HiSpFITs

3. DATA ANALYSIS

4. FINDINGS AND RECOMMENDATIONS

5. Q & A



HIGH SPENDING FITs

DEFINITION

“High Spending FITs (HiSpFITs) are travellers who spend considerably higher amounts compared to the average of Chinese outbound travellers spending in a destination, by spending more per person per day and/or by staying longer in the destination.”

FITs: The term FIT (Free Individual Traveller or Fully Individual Traveller) is used to refer to those who take their trips in all forms that are **NOT** “package group tours”. FITs are all forms of tours for a fixed group of people (or a single traveller) who travel with or without the partial or complete help of tour operators or travel agents (including customised tours organised by tour operators either in China or in the destination) and

- know each other before departure and travel together (family, friends, colleagues, expert groups, pilgrim groups, etc.) for the whole trip and
- can freely decide on changes of the itinerary on the spot without having to follow the command of a tour guide or the fixed programme of a tour operator
- travel predominantly for non-business purposes
- spend considerably higher amount of money compared to the average Chinese outbound travellers



HIGH SPENDING FITs

When discussing the profile of HiSpFITs, it is important to consider the total amount of spending per HiSpFIT during one trip, compared to per day, as the research results point to the fact that HiSpFITs are more likely to stay longer in one destination or to have a longer total stay in Northern Europe compared to other Chinese travellers.

PROFILE



AVERAGE SPENDING

Difficult to obtain, need to consider whole trip...

2,335 USD for the whole trip

Source: FGRT

1,186 EUR per day

Source: Business Finland, 2017



HIGH SPENDING FITS

Market Size and Forecast of HiSpFITs to Northern Europe

Year	Market Condition	%	Total Amount
Now 2017	Size of the current Chinese market to Nordic destinations in 2017 was 1.7 millions overnights	100%	1.7 million
	Chinese arrivals to Nordic destinations in 2017: averagely 2 nights per country, so Chinese arrival number = 1.7 mio. : 2	Divided by 2	850,000
	Number of Chinese visitors in 2017: averagely 2 countries per trip, so the number of Chinese visitors = 850,000 : 2	Divided by 2	425,000
	Out of these 425,000 Chinese visitors, 45% are non-fixed package tours, so the non-fixed Chinese visitors to Nordic = 425,000 x 45%	45%	191,250
	Out of these 191,250 non-fixed package tours, 25% are HiSpFITs, so the number of Chinese HiSpFITs = 191,250 x 25%	25%	47,800
Then 2022	Size of the potential Chinese market to Nordic destination in 2022 with CAGR 15%. So the total overnights to Nordic destinations in 2022 = 3.42 million	100%	3.42 million
	Chinese arrivals to Nordic destinations in 2022: averagely 2 nights per country, so Chinese arrival number = 3.42 mio. : 2	Divided by 2	1.7 million
	Number of Chinese visitors in 2017: averagely 1.8 countries per trip, so the number of Chinese visitors = 1.71 mio : 1.8	Divided by 1.8	950,000
	Out of these 950,000 Chinese visitors, 60% are non-fixed package tours, so the non-fixed Chinese visitors to Nordic 950,000 x 60%	60%	570,000
	Out of these 570,000 non-fixed package tours, 30% are HiSpFITs, so the number of Chinese HiSpFITs in 2022 = 570,000 x 30%	30%	171,000

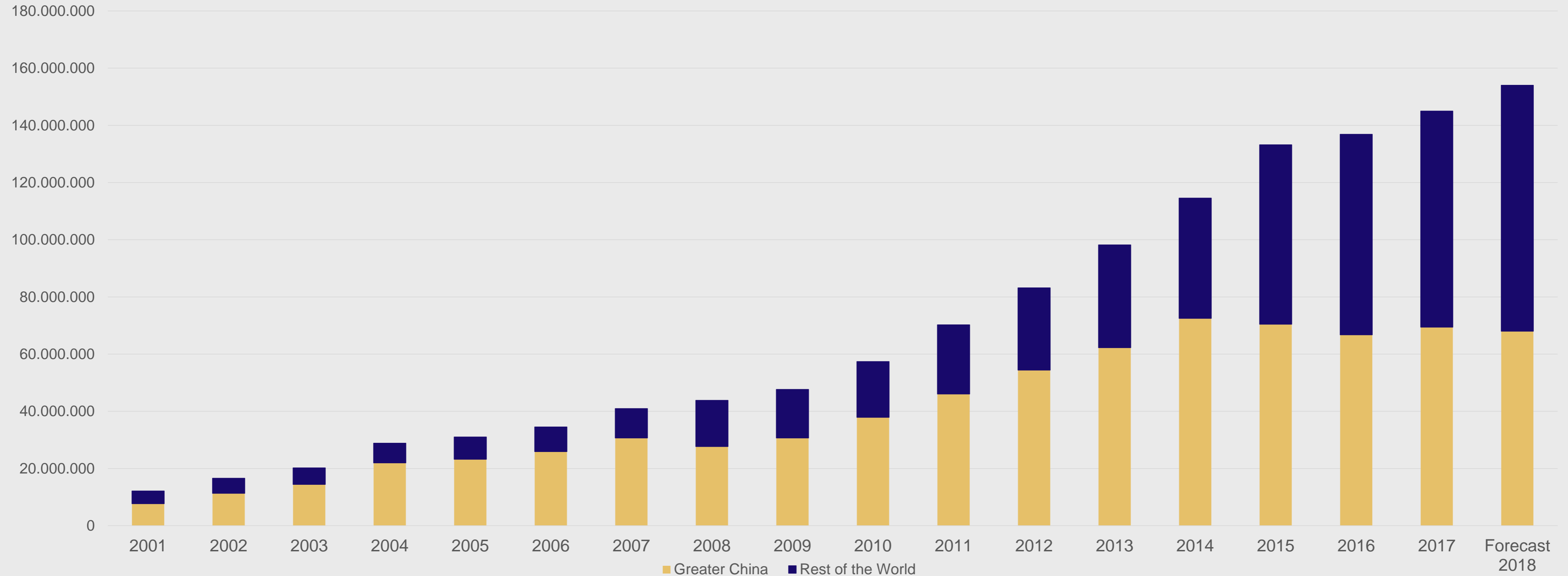
- High Spending FITs – including all Mainland Chinese non-fixed package tour travellers (FIT + customised groups + Semi-FIT) with considerably above-average non-shopping spending (meaning at least 33% more than average non-shopping spending) travelling not solely for business reasons.
- Forecast based on global tourism development and Chinese economic, social and political mid-level scenarios without major Black Swan events.

Percentage of non-fixed package tours varies between destinations: Higher percentage of FIT for main cities and for destinations which are not yet covered by tour operator itineraries.



DEVELOPMENT OF CHINESE OUTBOUND TOURISM MARKET

Market Size and Forecast of HiSpFITs to Northern Europe



The overall number of border-crossings out of Mainland China reached a new peak of 145 million in 2017.

Source: COTRI China Outbound Tourism Research Institute © 2018

COTRI Forecast 2018: 156 million

COTRI Forecast 2030: 390 million



DEVELOPMENT OF CHINESE OUTBOUND TOURISM MARKET

Top 15 Destinations By Number Of Arrivals 2017

Ranking 2017	Destinations	Ranking 2016	Arrivals of Chinese Visitors (in million)	YoY Change in %
1	Hong Kong	1	44.4	3.9
2	Macau	2	22.2	8.5
3	Thailand	3	9.8	12.0
4	Japan	5	7.4	15.4
5	South Korea	4	4.2	-48.3
6	Vietnam	10	4.0	48.6
7	Singapore	9	3.2	12.7
8	USA	8	2.9	-2.8
9	Taiwan	6	2.8	-20.7
10	Malaysia	11	2.3	7.4
11	Italy	7	2.1	21.3
12	Indonesia	13	2.1	41.6
13	France	12	2.0	19.0
14	Germany	14	1.6	13.5
15	Russia	15	1.5	16.4

DESTINATIONS SHIFT

Chinese outbound visitors are looking for alternatives to Greater China and South Korea; Southeast Asian destinations, such as Cambodia, Indonesia, Vietnam, Philippines, all recorded more than 40% YoY growth rates in 2017, providing such alternatives in proximity, low price, offering streamlined visa requirements (or visa-free entry) and increased aviation connectivity.

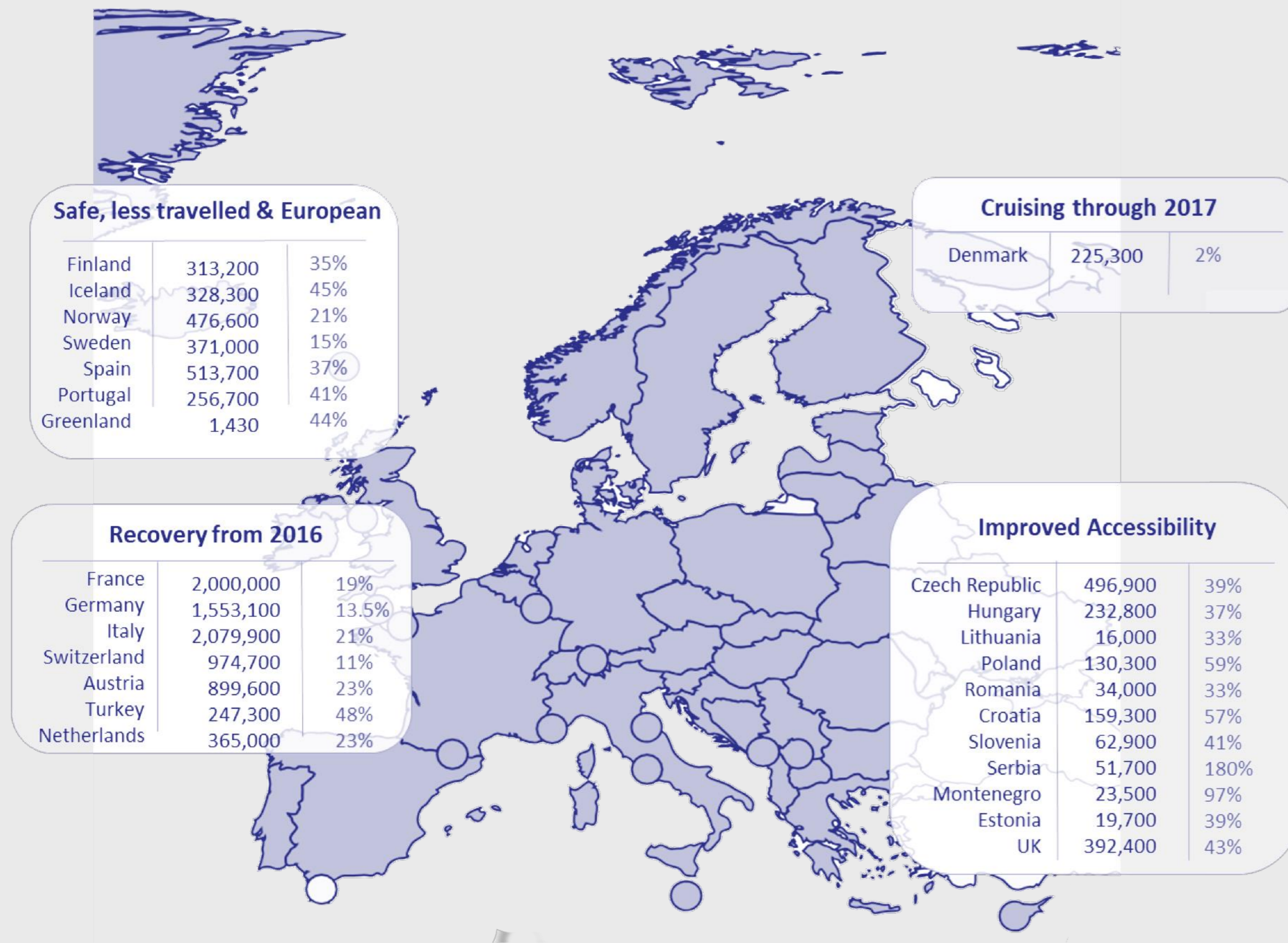
Nine out of the top ten destinations are still all located in Asia, the only exception being the United States. At the beginning of the decade, these ten destinations were responsible for more than 80% of all border-crossings from Mainland China. By 2017 their share has fallen to just over 60%.

Source: COTRI



DEVELOPMENT OF CHINESE OUTBOUND TOURISM MARKET

Chinese Arrivals to Europe (2017)



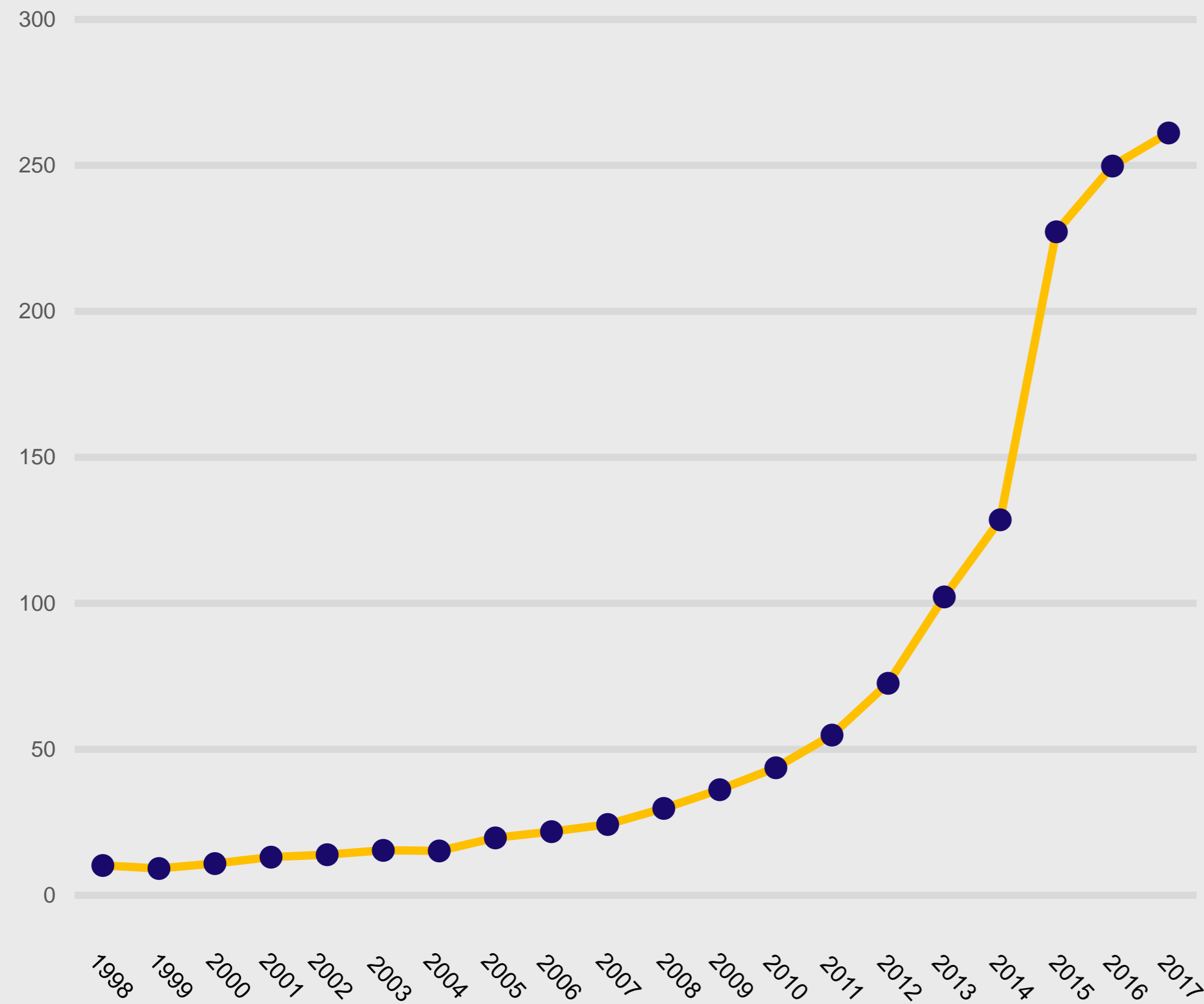
- Most major European destinations saw strong growth in Chinese arrivals return in 2017
- “Classical” Western European countries have largely recovered
- Central and Eastern European destinations are benefitting from being seen as novel, less well-trodden routes
- Northern European destinations offer distinctively clean and unique outdoor (soft adventure) activities
- Southern European destinations continue to attract curious Chinese visitors with warm weather, renowned local cuisines and the possibility to be easily combined with several North African destinations with recently-liberalised visa policies for Chinese passport holders.

Note: Finland, Sweden, Denmark, Iceland, Estonia and the Netherlands are overnight figures.



DEVELOPMENT OF CHINESE OUTBOUND TOURISM MARKET

Chinese Outbound Tourists' Expenditure (in billion USD)



TOTAL SPENDING INCREASING, PER HEAD DROPPING

China again consolidated its leadership as the top spender with 258 billion USD in expenditure (a +3% year-on-year growth).

Significant changes in spending behaviour are continuously taking place, particularly among more experienced Chinese travellers.

Less per head spending on shopping has been reported at various destinations as Chinese travellers turn increasingly towards enjoying high-quality local resources during their overseas trips

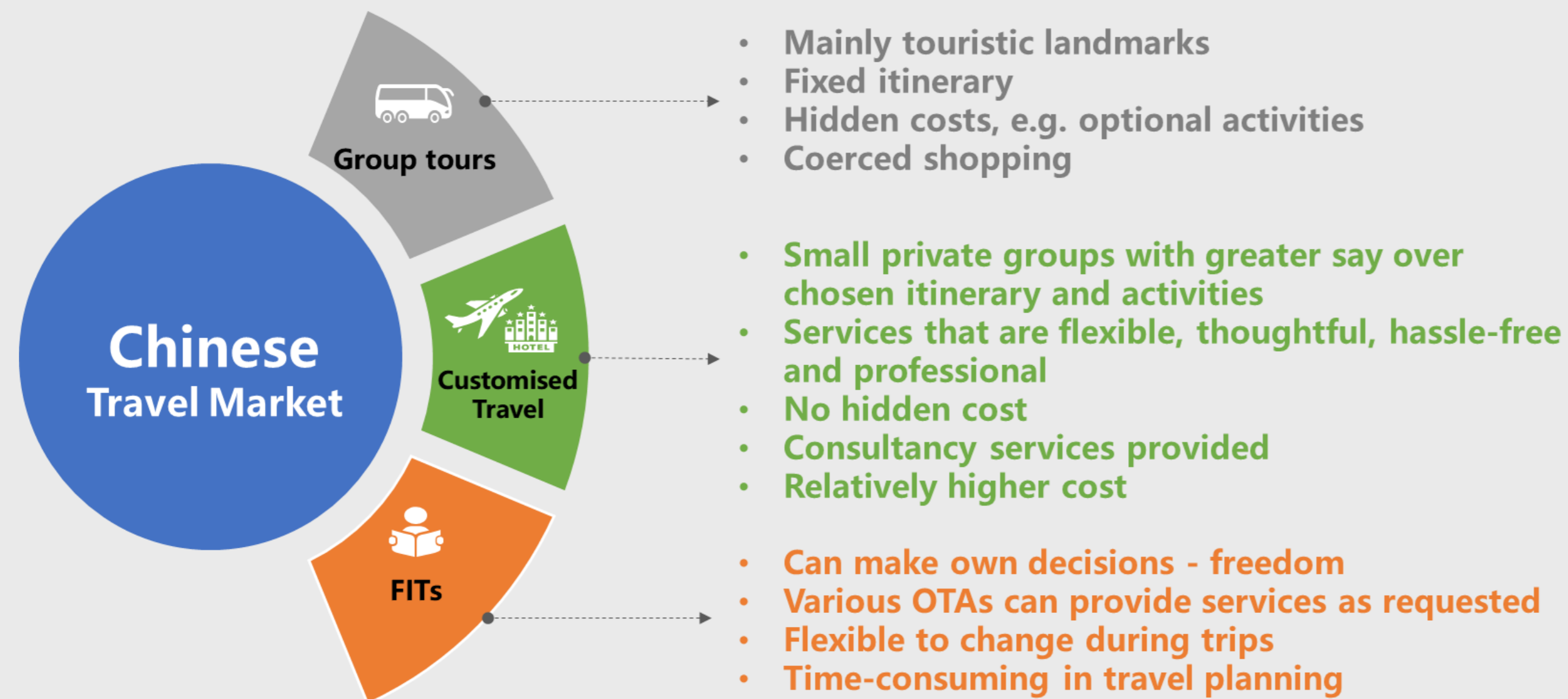
Note: Finland, Sweden, Denmark, Iceland, Estonia and the Netherlands are overnight figures.



DEVELOPMENT OF CHINESE OUTBOUND TOURISM MARKET IN GENERAL

CTRIP APPROACH:

Difference Among Chinese Package Group Tours,
Customised Travel and FITs



FORMATION OF HISPFITS SEGMENT

Growing number of Chinese travelling as FITs.

But FITs' experience is not suitable for everyone.

Customised tours start to take significant shares.

According to Ctrip 2017:

- package group tours 44%
- FIT related products 42%
- Private groups and customised tours 14%



3. DATA ANALYSIS

– SUPPLY ANALYSIS

1. INTRODUCTION

2. SETTING THE SCENE

3. DATA ANALYSIS

- Supply point of view
 - Answers from collected questionnaires distributed among Nordic DMOs
 - Usage of “Northern Europe”
 - Chinese market development
 - Tourism infrastructure
 - Current product and offers
 - Destination marketing
- Demand perspectives
- Competition analysis

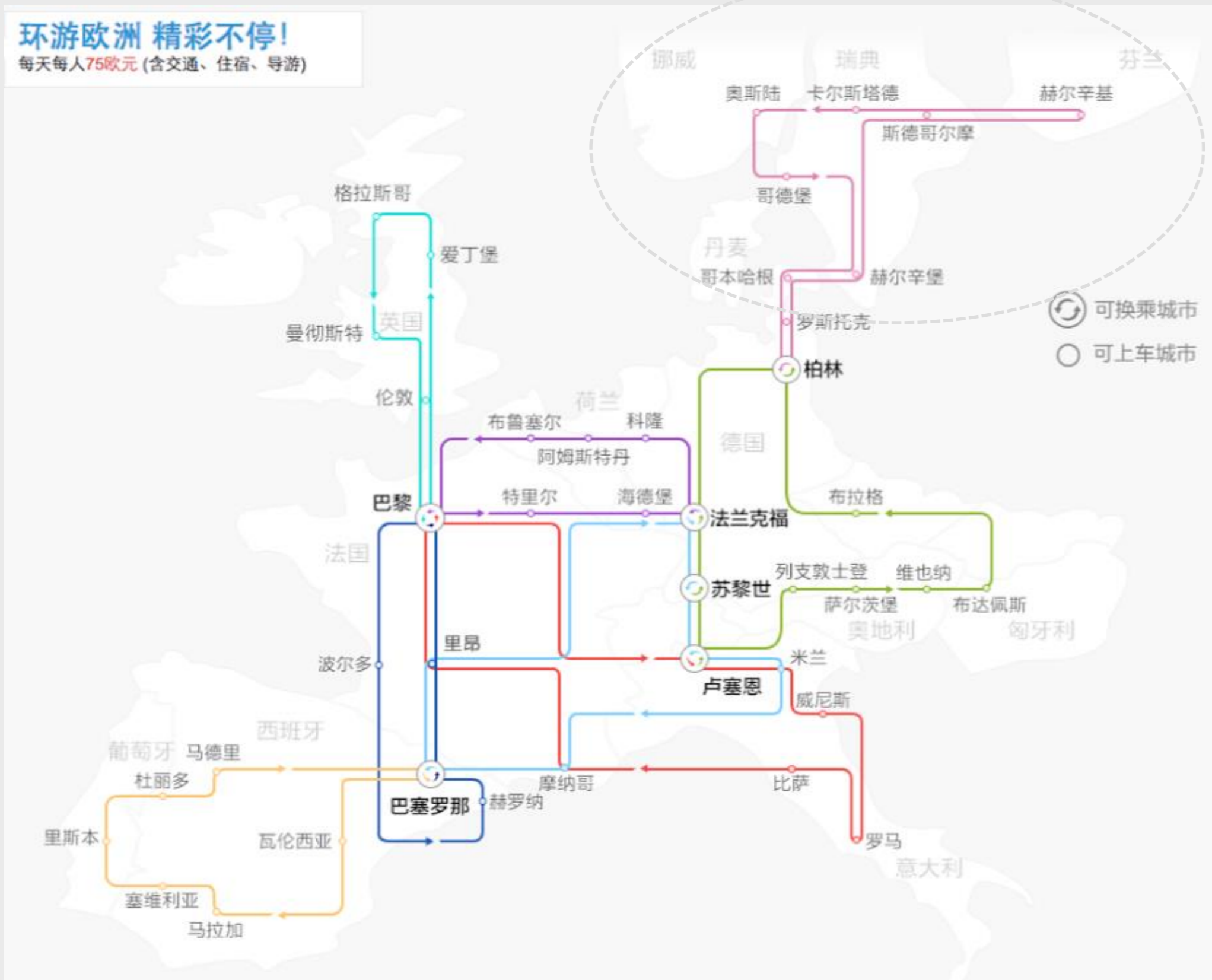
4. FINDINGS AND RECOMMENDATIONS

5. Q & A



SUPPLY POINT OF VIEW

Kaytrip's Pan-Europe "hop-on hop-off" bus tour
- product brochure



THE USAGE OF "NORTHERN EUROPE" IN CHINA

- "Northern Europe" (北欧) - this term is the most familiar one for Chinese travellers as Chinese tour operators used to package Denmark, Finland, Norway and Sweden together for package products and brand them as the "Northern Europe Four Countries" route (see the tour map by Kaytrip).
- Northern Europe is still used in the market place, e.g. 2017 destination marketing and Mafengwo promotion including aforementioned countries.
- The terms "Scandinavia" and "the Nordic countries" are both rather vague terms for the Chinese market as these terms haven't been marketed consistently (collectively or individually) or sold by Chinese tour operators in consistency in their package products.

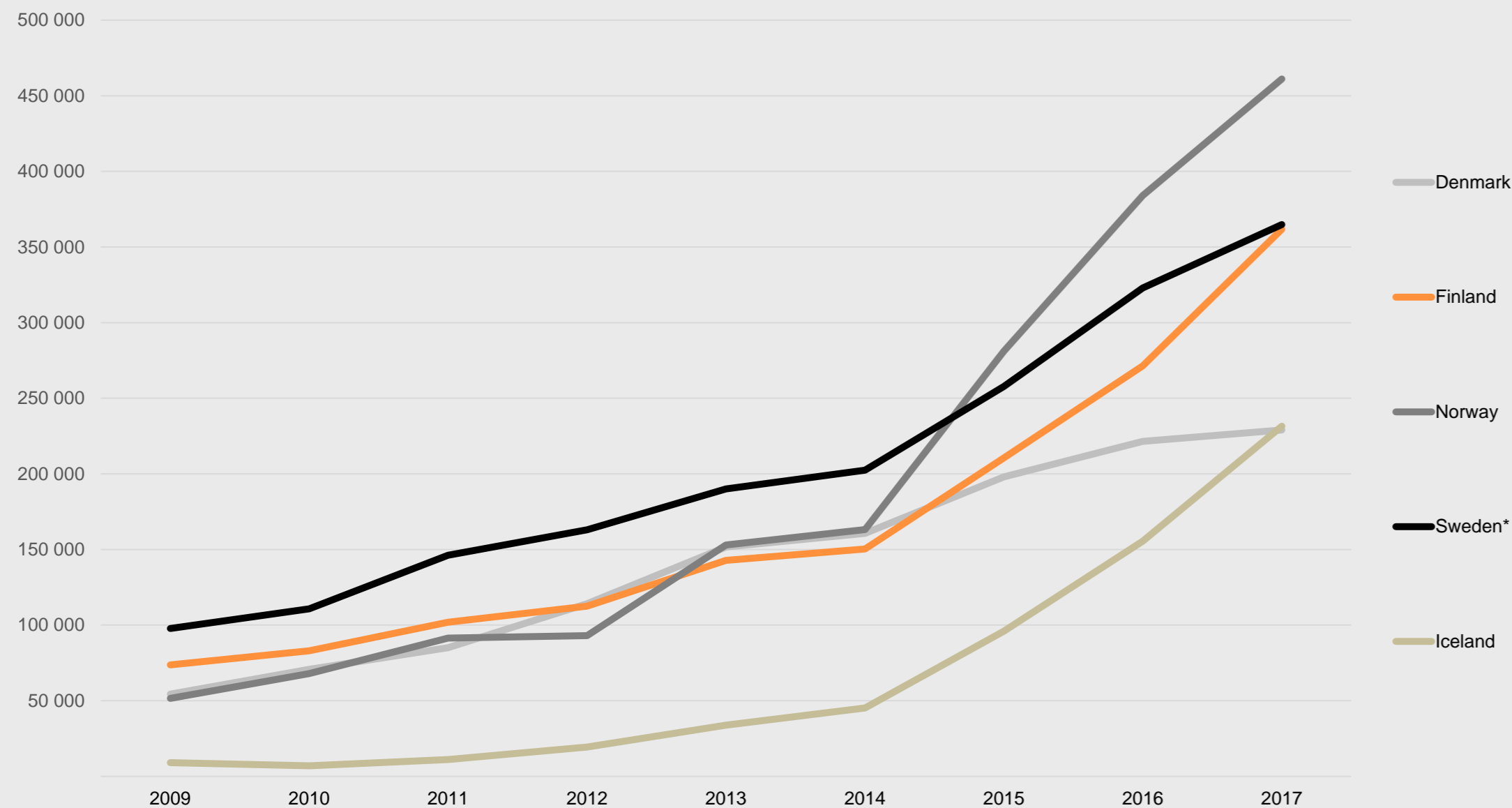


SUPPLY POINT OF VIEW

STRONG INCREASE OF OVERNIGHTS

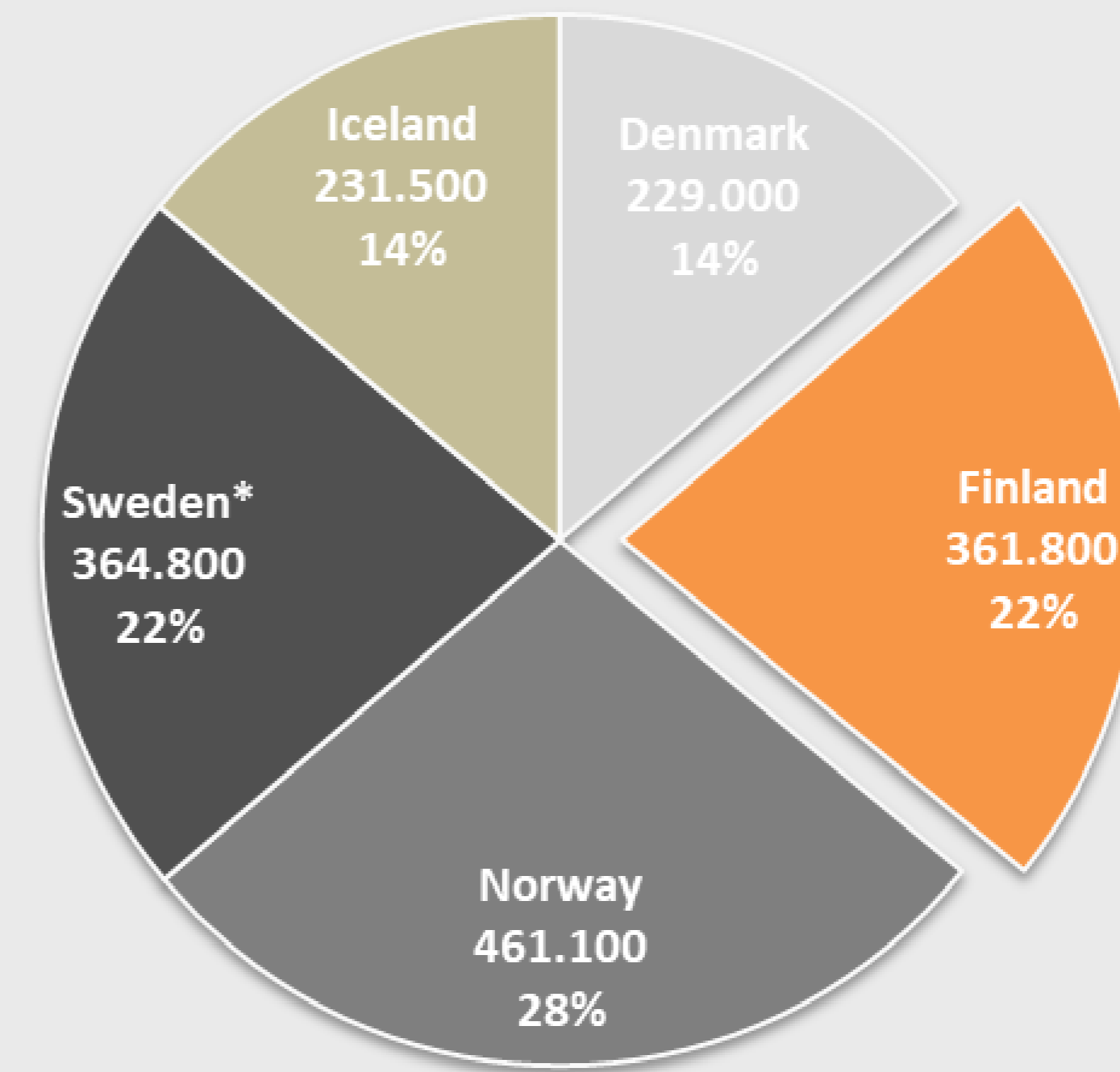
- The classic “Northern Europe four countries” itinerary – Denmark, Finland, Norway and Sweden
- “Blackhorse” - Iceland started gaining traction since early 2014

DEVELOPMENT OF CHINESE OVERNIGHTS 2009-2017



Source: Visit Finland. Rudolf Statistic Service: Statistic Finland, Statistics Denmark, Norway, Sweden, and Iceland

NORDIC COUNTRIES' SHARE OF CHINESE OVERNIGHTS 2017



*Note: The Chinese Overnights in Sweden only include overnights from Mainland China, while the Chinese overnights in all other four countries in the above graph include overnights from both mainland China and Hong Kong.

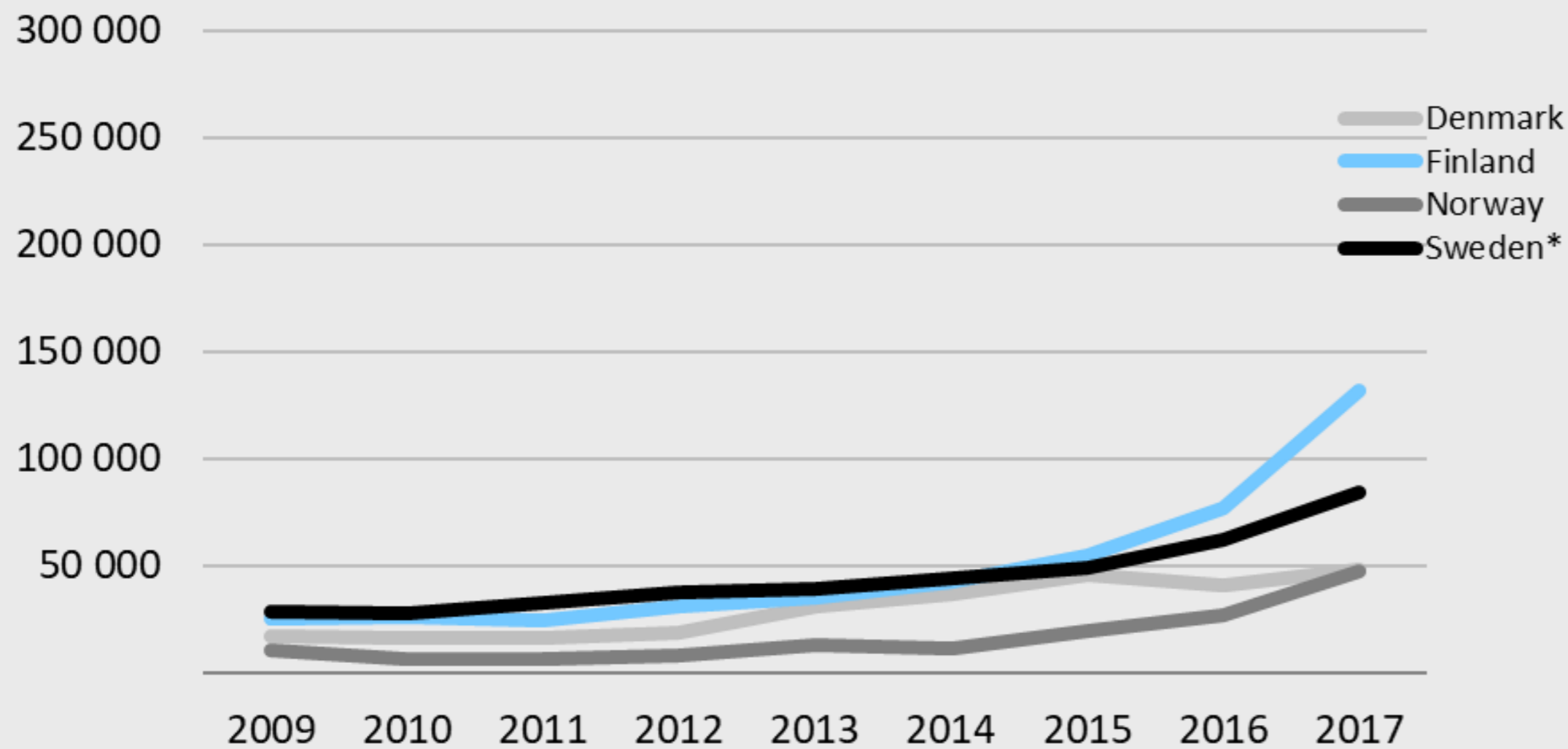


SUPPLY POINT OF VIEW

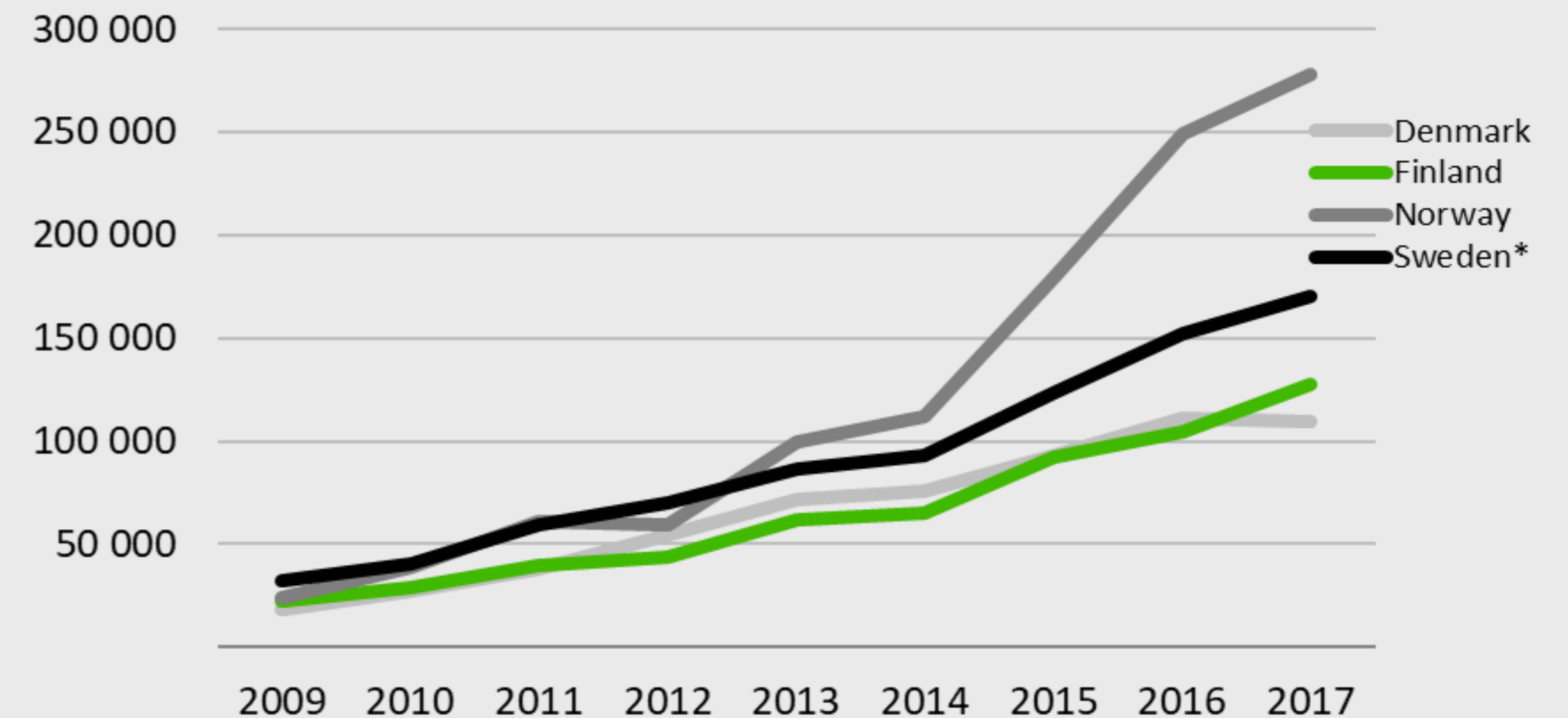
SEASONALITY CAN BE SEEN CLEARLY

With the strong increase in Chinese arrivals and usage of tourism accommodation and other resources, the management of seasonality become more urgent for Nordic destinations.

CHINESE OVERNIGHTS IN THE NORDIC COUNTRIES, WINTER SEASON (DEC-APR) 2009-2017



CHINESE OVERNIGHTS IN THE NORDIC COUNTRIES, SUMMER SEASON (JUN-AUG) 2009-2017



Source: Visit Finland. Rudolf Statistic Service: Statistic Finland, Statistics Denmark, Norway, and Sweden

*Note: The Chinese Overnights in Sweden only include overnights from Mainland China, while the Chinese overnights in all other four countries in the above graph include overnights from both mainland China and Hong Kong.



SUPPLY POINT OF VIEW

NORDIC VISA SERVICES AND CENTERS ARE AVAILABLE

Destination	Visa application centre in China
Iceland	Beijing, Guangzhou, Shanghai
Finland Åland Islands	Beijing, Changsha, Chengdu, Chongqing, Fuzhou, Guangzhou, Hangzhou, Jinan, Kunming, Nanjing, Shanghai, Shenzhen, Shenyang, Wuhan, Xian
Sweden	Beijing, Changsha, Chengdu, Chongqing, Hangzhou, Jinan, Kunming, Nanjing, Shanghai, Shenzhen, Shenyang, Wuhan, Xian
Norway	Beijing, Guangzhou, Shanghai
Denmark Greenland Faroe Islands	Beijing, Changsha, Chengdu, Chongqing, Fuzhou, Guangzhou, Hangzhou, Jinan, Kunming, Nanjing, Shanghai, Shenzhen, Shenyang, Wuhan, Xian

- All Nordic destinations obtained ADS in 2004
- Chinese citizens need to obtain a visa mandatorily to visit any of the Nordic country
- By the end of 2017, Nordic destinations have established four visa application centres as shown in below table. Dozens of visa application centres of other Schengen countries in China have eased the accessibility of visa to the Nordic region for Chinese visitors.



SUPPLY POINT OF VIEW

CONVENIENT AND AFFORDABLE FLIGHT CONNECTIONS BETWEEN THE NORDIC REGION AND CHINA IS ACCESSIBLE

Flight connections between China and the Nordic region are frequent, affordable and reaching Chinese lower tier cities as well as Nordic regional cities. This claim can be substantiated by data from netnography, individual travellers interviews and expert interviews. The well-developed infrastructure is also favourite conditions in developing the market segment of HiSpFITs.

POPULAR GATEWAY CITIES FOR CHINESE VISITORS

Final destination	Final city	Gateway country	Gateway city	City in China	
Norway	Aalesund Vigra	Netherlands	Amsterdam	Beijing	
		France – Belgium	Paris-Brussels-Oslo	Guangzhou	
			Turkey	Istanbul-Oslo	
			France	Paris-Oslo	Shanghai
		Bergen	Russia	Moscow	Beijing
			Netherlands	Amsterdam	
			Turkey	Istanbul-Oslo	Guangzhou
			France	Paris-Oslo	Shanghai
			France – Denmark	Paris-Copenhagen	
		Oslo	Finland	Helsinki	Beijing
		Russia	Moscow		
		France	Paris		
		Sweden	Stockholm		
		Qatar	Doha	Chengdu	
		Qatar	Doha	Guangzhou	
		France	Paris		
		Netherlands	Amsterdam		
		UAE	Dubai		
		France	Paris	Shanghai	
		Russia	Moscow		
		UK	London		
		Netherlands	Amsterdam	Xiamen	



SUPPLY POINT OF VIEW

Final destination	Final city	Gateway country	Gateway city	City in China
Iceland	Reykjavik	Finland	Helsinki	Beijing
		France	Paris	
		Netherlands	Amsterdam	
		UK	London	
		Switzerland	Zurich	
		Germany	Munich	
		Germany	Frankfurt	
		Sweden	Stockholm	
Greenland	Nuuk	UK	London	Shanghai
		Finland	Helsinki	
		Belgium	Brussels	
		Netherlands	Amsterdam	
		France	Paris	
	Ilulissat	Germany	Frankfurt	
		UK	London	Guangzhou
		Netherlands	Amsterdam	
		Finland- Iceland	Helsinki- Reykjavik	Beijing
		Sweden-Iceland	Stockholm – Reykjavik	
		Finland- Iceland	Helsinki- Reykjavik	Shanghai
		Sweden-Iceland	Stockholm-Reykjavik	
		Finland-Iceland	Helsinki- Reykjavik	Beijing
		Sweden-Iceland	Stockholm – Reykjavik	
		UK-Iceland	London- Egilsstadir	
		Finland- Iceland	Helsinki- Reykjavik	Shanghai
		Sweden-Iceland	Stockholm-Reykjavik	

Final destination	Final city	Gateway country	Gateway city	City in China
Finland	Helsinki	DIRECT FLIGHT		Beijing
				Shanghai
				Chongqing Xi'an Guangzhou Chengdu Kunming Nanjing
Sweden	Stockholm	DIRECT FLIGHT		Beijing Shanghai
Denmark	Copenhagen	DIRECT FLIGHT		Beijing Shanghai



SUPPLY POINT OF VIEW



Max Adulyanukosol / Unsplash

NORDIC DESTINATIONS' PRODUCT DEVELOPMENT

- “classic” product remains popular even until today, and variations are to add other countries onto the basis of these four countries.
- More Chinese visitors are seeking lesser travelled European routes such as those in Northern Europe and Central and Eastern Europe, and this shift was further enhanced with increasingly aggressive destination marketing efforts made by Nordic DMOs.
- Caution should be taken while promoting “Northern Europe” in China at this stage.



SUPPLY POINT OF VIEW

NORDIC DESTINATIONS' MARKETING ACTIVITIES IN CHINA – TRADE MARKETING

Finland, Norway, Denmark, and Sweden

Take active steps towards B2B marketing, focusing on roadshows, workshops, conferences, exhibitions, sale visits, FAM trips, travel and trade shows, training, and seminars.

Finland stands out as the destination with the highest effectivity in B2B integration, while Sweden still remains lesser known and understood despite B2B efforts.

Norway, Denmark, and Sweden often work together in B2B promotions and activities, through all of these, Norway overall receives the greatest recognition.

B2B efforts show inconsistency of destination awareness.

Greenland, Iceland, Faroe Islands and Åland

Imbalanced efforts in B2B outreach; in particular, Iceland has made active B2B outreach despite without collaboration with other Nordic DMOs. Greenland has limited but growing B2B efforts. Faroe Islands and Åland Islands haven't started B2B works with the Chinese market yet.

China-based travel agents and tour operators in China struggle with a deficiency of information from these destinations and are thus unable to adequately sell their products in the Chinese market.



SUPPLY POINT OF VIEW

DIGITAL PERFORMANCE & BRANDING

Methodology:

The analysis of the DMO's current digital performance and branding took place in two stages.

The first stage is digital performance, which is done through analysing each brand on the basis of five key areas: search index, social media, website, campaigns/KOLs and partnerships. Each of these categories is given a score from 1 to 5- with 1 being the lowest and 5 the highest.

The second stage of the methodology concerns each DMO's brand positioning in the market. For this section, each brand's own digital platforms in the Chinese market are first analysed through the eyes of a FIT. Information from the last six months was then sorted into 15 categories covering the three themes of Culture and Lifestyle, Nature and the Great Outdoors, and Metropolitan and Activities. Each of the 15 categories was given a score out of 5 corresponding with the relevancy of the theme in the brand's owned content.

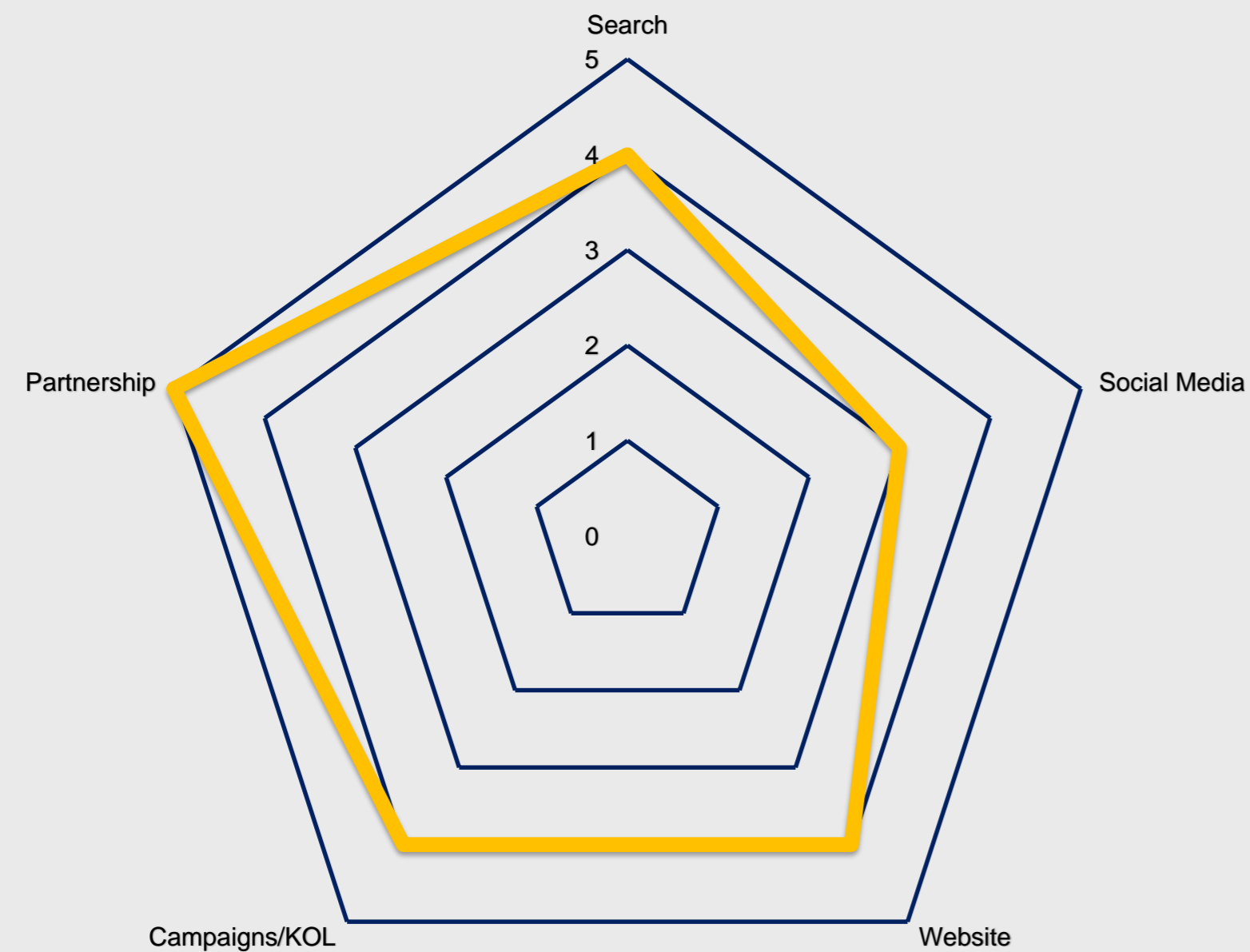


SUPPLY POINT OF VIEW

FINLAND

- Digital Performance: Strong partnership performance digitally, interaction with followers through social media channels have potentials to further optimize
- Branding & USPs: Focus on natural beauty and cultural heritage, with a diverse range of other topics, USPs including Nature & scenery, Unique outdoor Sports & Santa Clause related attractions.

Digital Performance



Branding & USPs

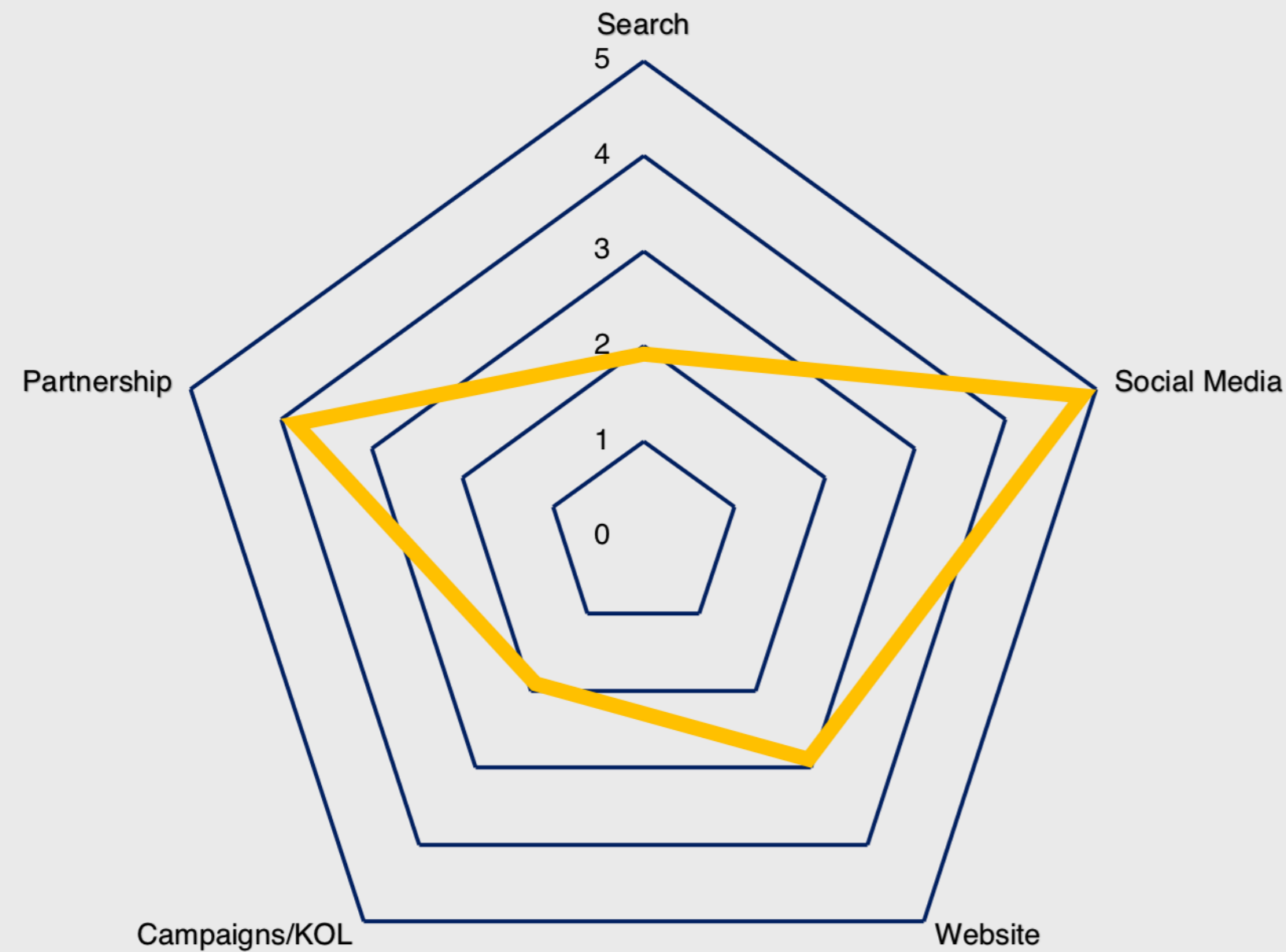


SUPPLY POINT OF VIEW

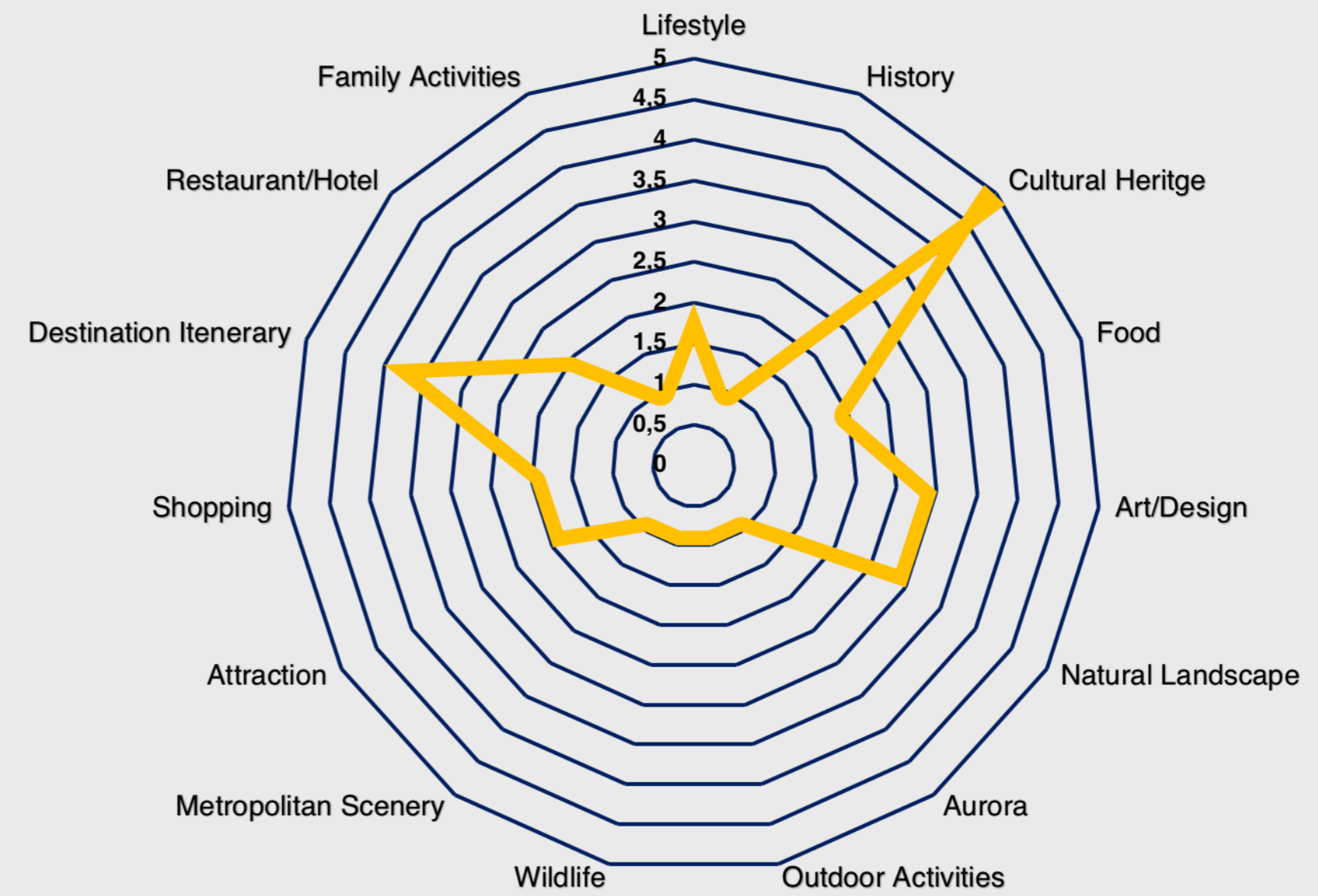
SWEDEN

- Digital Performance: Social media engagement and interactions are the best within all Nordic destinations, while search frequency is relatively low.
- Branding & USPs: Cultural heritage is the main brand column, USPs including cultural heritage, healthy and happy lifestyle

Digital Performance



Branding & USPs

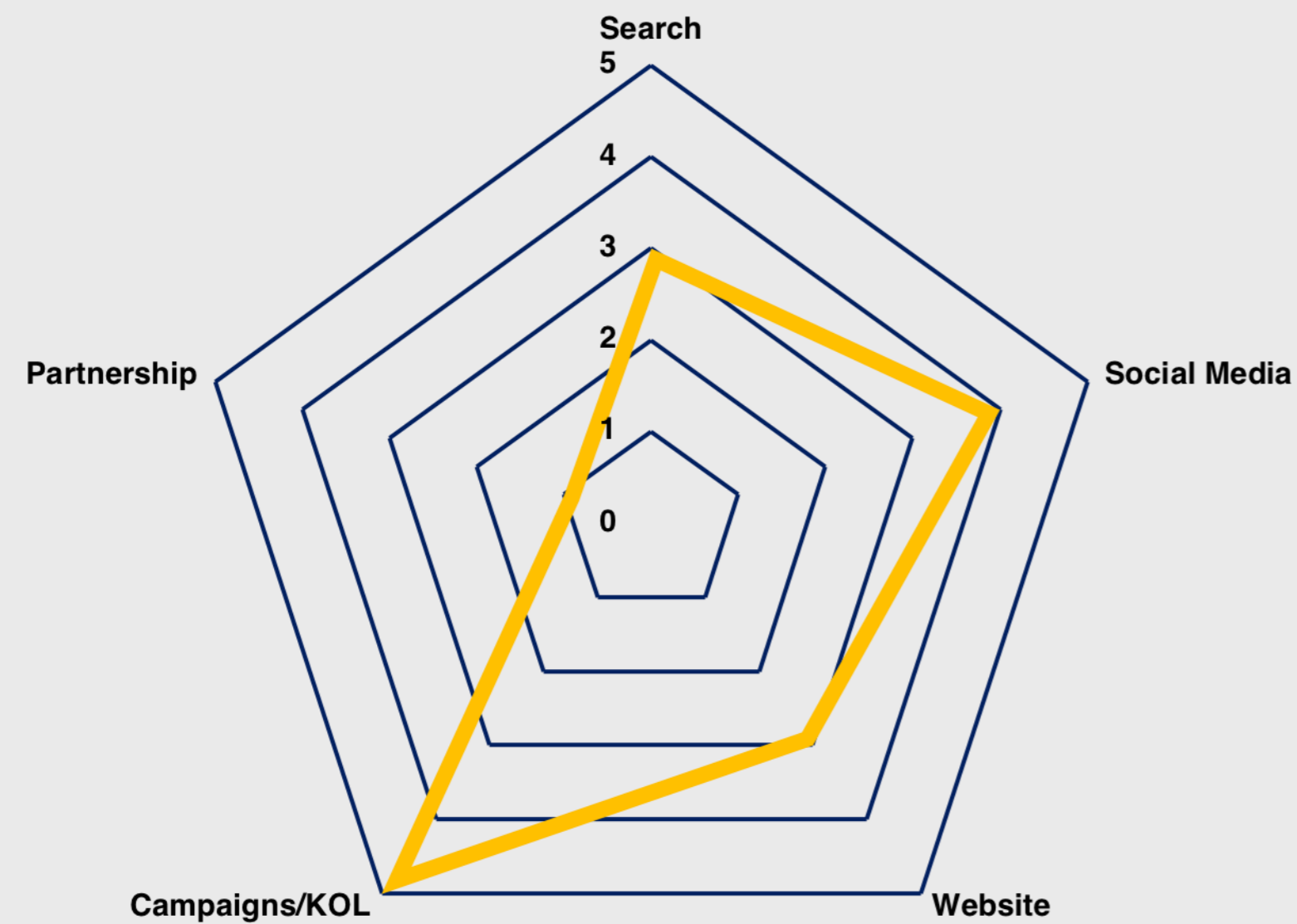


SUPPLY POINT OF VIEW

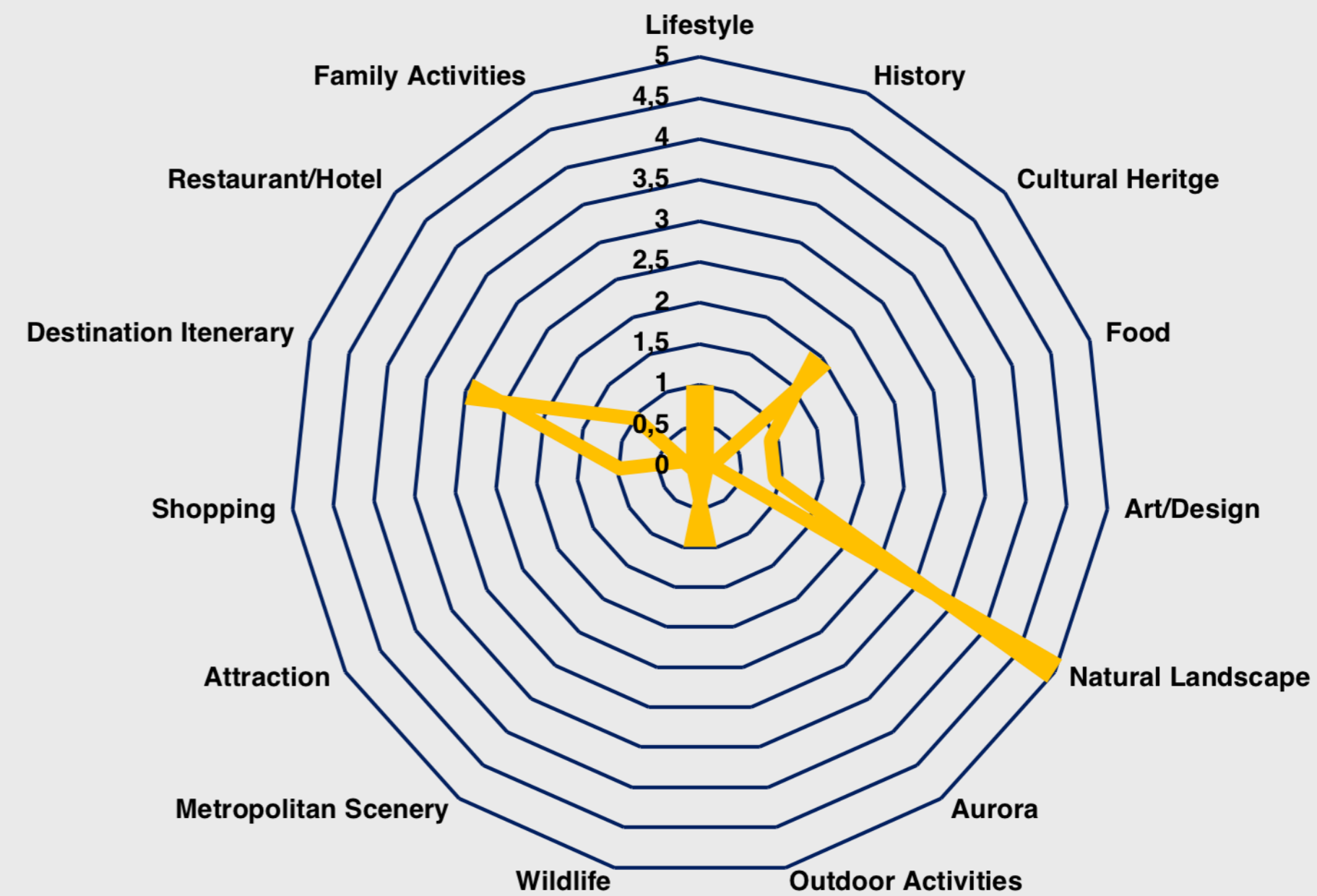
NORWAY

- Digital Performance: High affinity for campaigns and KOL interactions, high viewership and audience interaction with campaign-based content while few partnership were observed.
- Branding & USPs: Largely focus on natural landscape, destination itineraries are secondary brand platform which also tie back to natural scenery, USP like Fjords were the most mentioned

Digital Performance



Branding & USPs

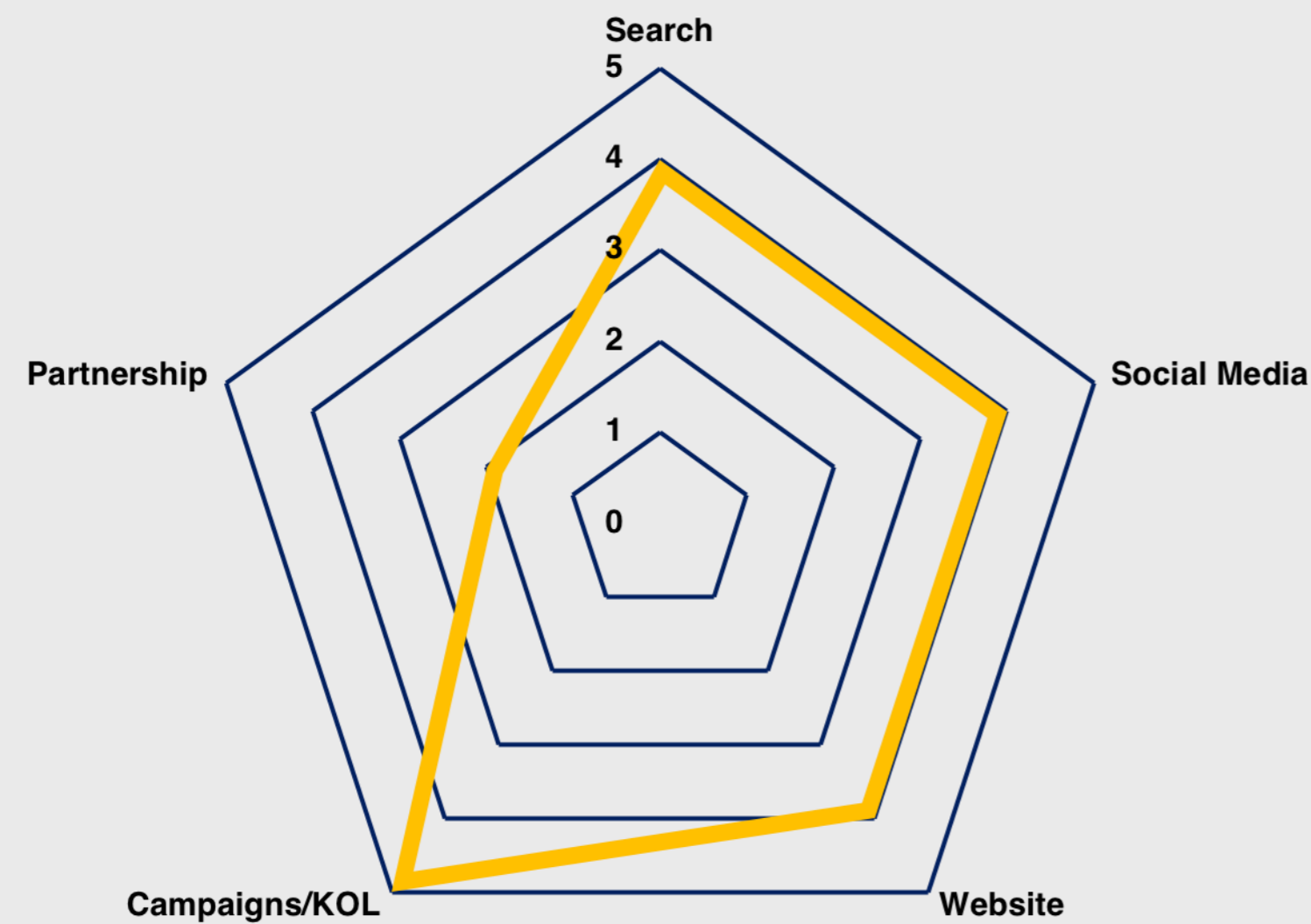


SUPPLY POINT OF VIEW

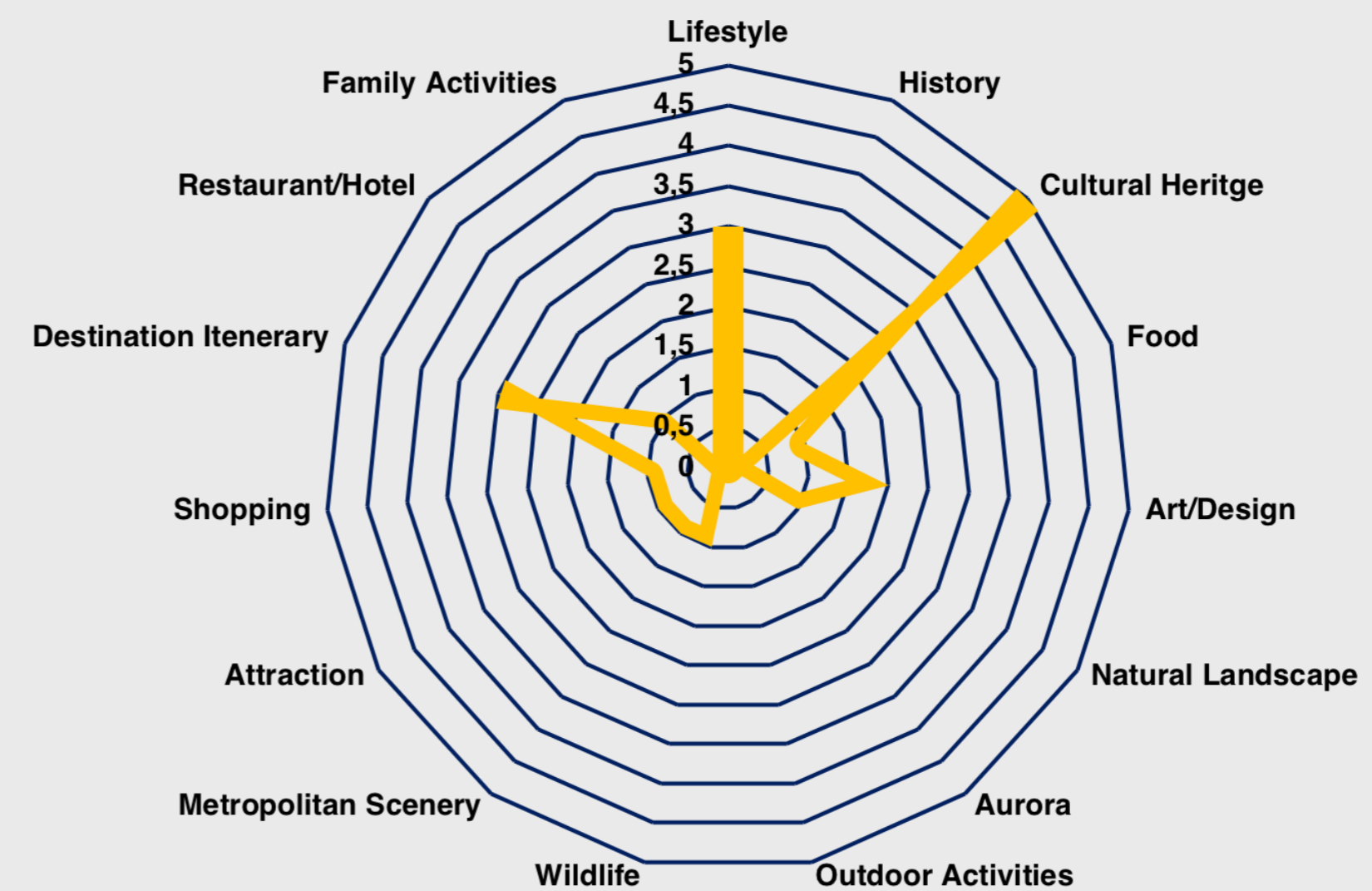
DENMARK

- Digital Performance: ‘oyster campaign’ and partnership with WangYuan bring sizable effect on tourism to the country.
- Branding & USPs: Primary focus is culture and lifestyle and stress the culture itself which form differently such as Hans Christian Anderson’s fairy tales, music festival and art museums, USPs including metropolitan lifestyle and abundant cultural experiences

Digital Performance



Branding & USPs

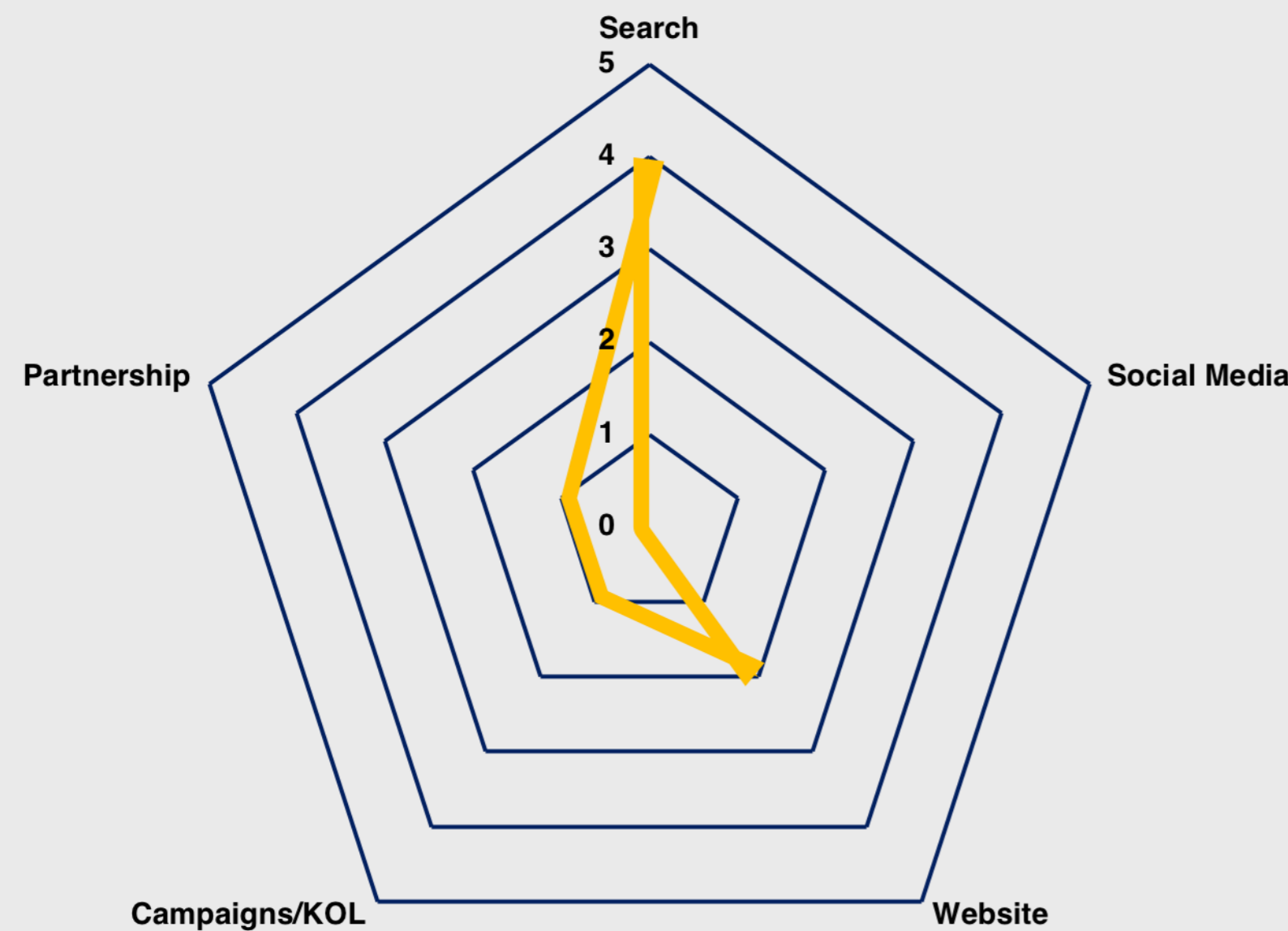


SUPPLY POINT OF VIEW

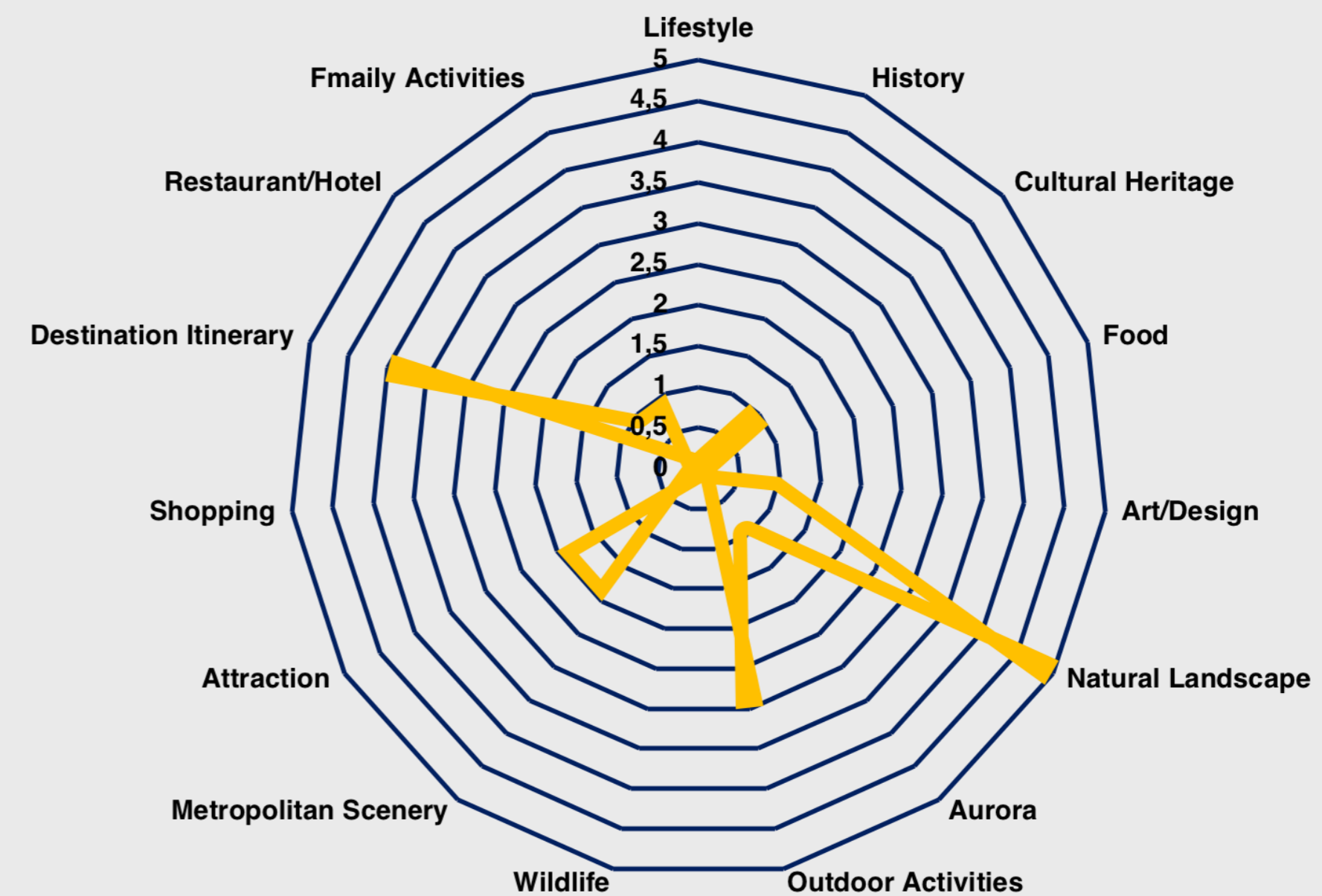
ICELAND

- Digital Performance: Highest search volume among Nordic country on Baidu and grew rapidly while little efforts has been made in terms of other aspects.
- Branding & USPs: Strongest brand pillar on Iceland Chinese language website featured natural landscape and scenery, USPs including dramatic landscapes such as glaciers and volcanoes, and quaint towns and villages.

Digital Performance



Branding & USPs



3. DATA ANALYSIS

– DEMAND PERSPECTIVES

1. INTRODUCTION

2. SETTING THE SCENE

3. DATA ANALYSIS

- Supply point of view
- Demand perspectives
 - Netnography and individual interviews
 - Travel motivation
 - Information source
 - Destination image and brands
 - Travel experience and barriers
- Competition analysis

4. FINDINGS AND RECOMMENDATIONS

5. Q & A



DEMAND PERSPECTIVES

USED MEDIA SOURCES FOR NETNOGRAPHY

Type of platform	Sources	Comments
User Generated Content Platforms	Qyer Mafengwo	Key Chinese travel UGC platforms for sharing users' reviews, tips, experience, travel diaries and blogs, photos, itineraries, etc.
	You.ctrip Bread Trip Chanyouji	Market followers to Qyer and Mafengwo in providing UGCs.
Social network sites	Weibo	Most popular Chinese micro-blogging website.
	Zhihu	Major Q&A social network site
	Tiaya (Lvyou)	Popular internet forums with a dedicated tourism-related area
	Douban	Social media platform featuring culture and arts topics (movies, books and music)
OTAs	Ctrip Tuniu	Major OTAs (Online Travel Agencies)
	Fliggy	Leveraging Alibaba's large user base and aim particularly at younger users
Search engine	Baidu	China's #1 comprehensive search engine, with its own travel section

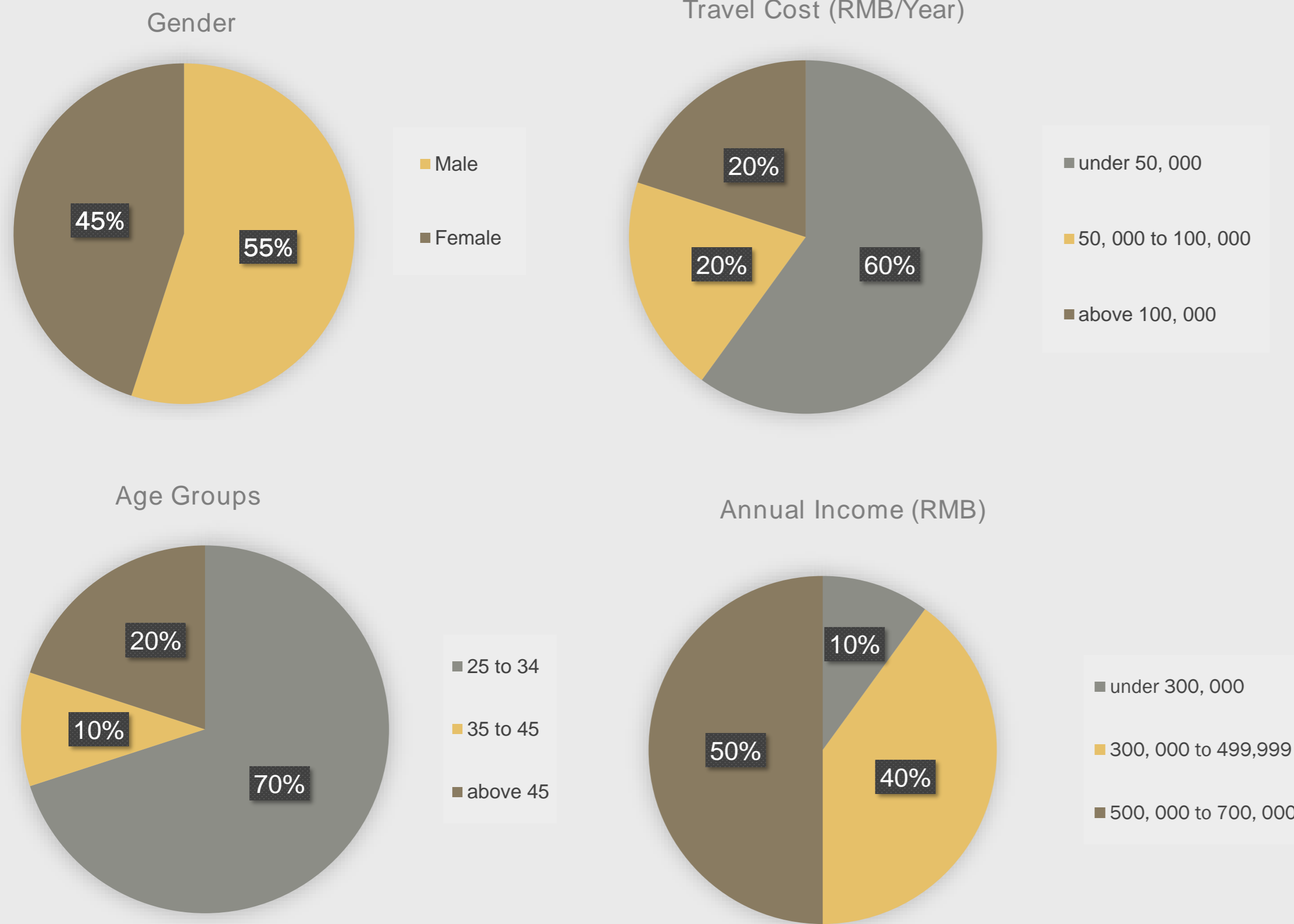
COLLECTING CHINESE SOCIAL MEDIA FOR NETNOGRAPHY

- Social media netnography provides a tool which allows market researchers to listen to the unfiltered voice of travellers, especially in China, where sharing impressions and information with fellow virtual traveller peer groups is seen almost as a duty.
- 400 social media items, posted within the past three years on aforementioned Chinese social media platforms by Chinese HiSpFITs were collected between March and April 2018 (Appendix A). All were translated and clustered into themes such as "Motivation", "Experience", "Information Source" and "Barriers". The analysis of these collected items was conducted by discussing the Northern Europe as a whole destination, and each Nordic destination on its own to demonstrate HiSpFITs' demand in China.

DEMAND PERSPECTIVES

20 INDIVIDUAL HiSpFITs TRAVELLERS WERE INTERVIEWED

INDIVIDUAL HiSpFITs INTERVIEWS



Interviewees were recruited through WeChat groups and friends referrals.

Most of these interviewees live in first tier Chinese cities and a smaller percentage live in second tier cities, Hong Kong and Europe, which is consistent with the distribution of current source markets for the Nordic destinations.

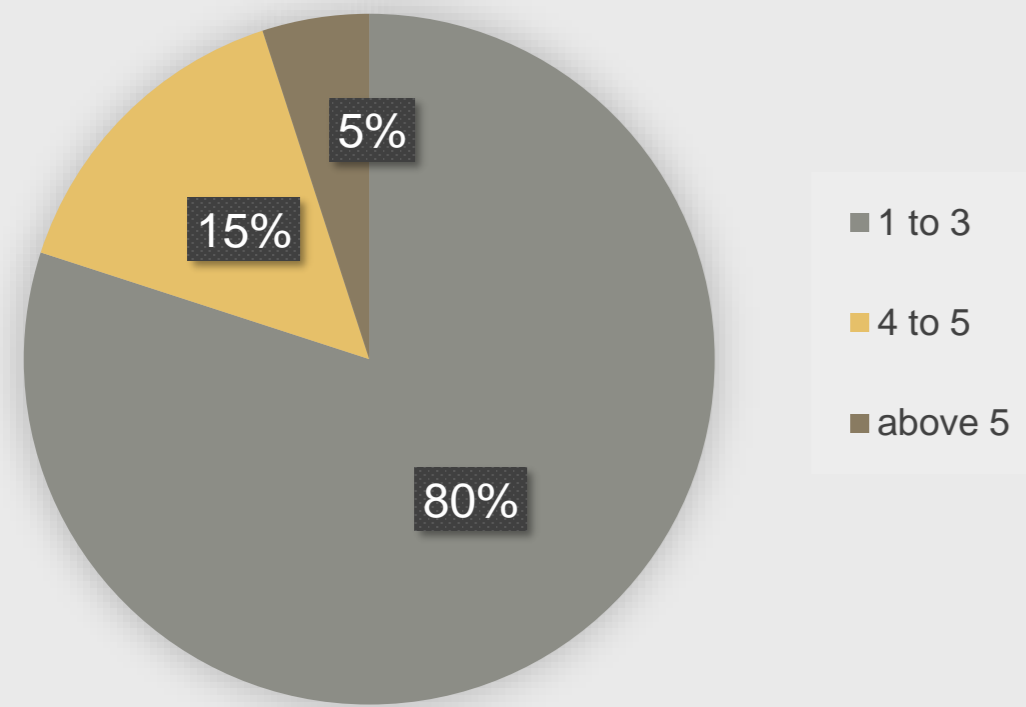
Interviewees all travelled to Nordic countries in the past 24 months as FITs including customised groups with their friends, families or colleagues. Their spending during Nordic trips were on average of 15,000 to 20,000 RMB per week.



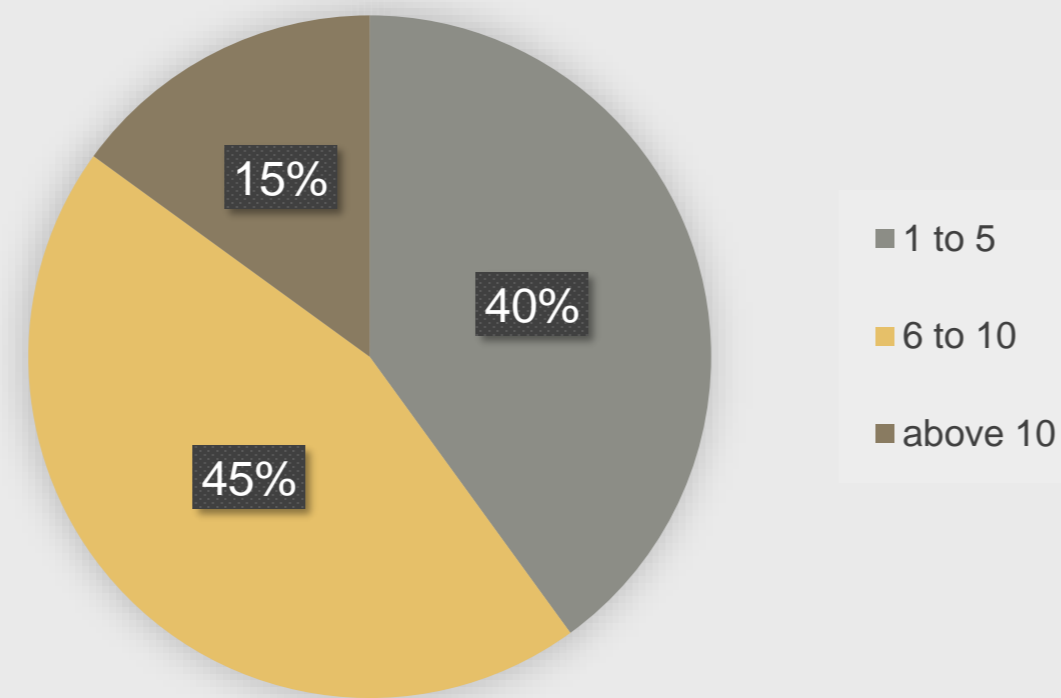
DEMAND PERSPECTIVES

20 INDIVIDUAL HiSpFITs TRAVELLERS WERE INTERVIEWED

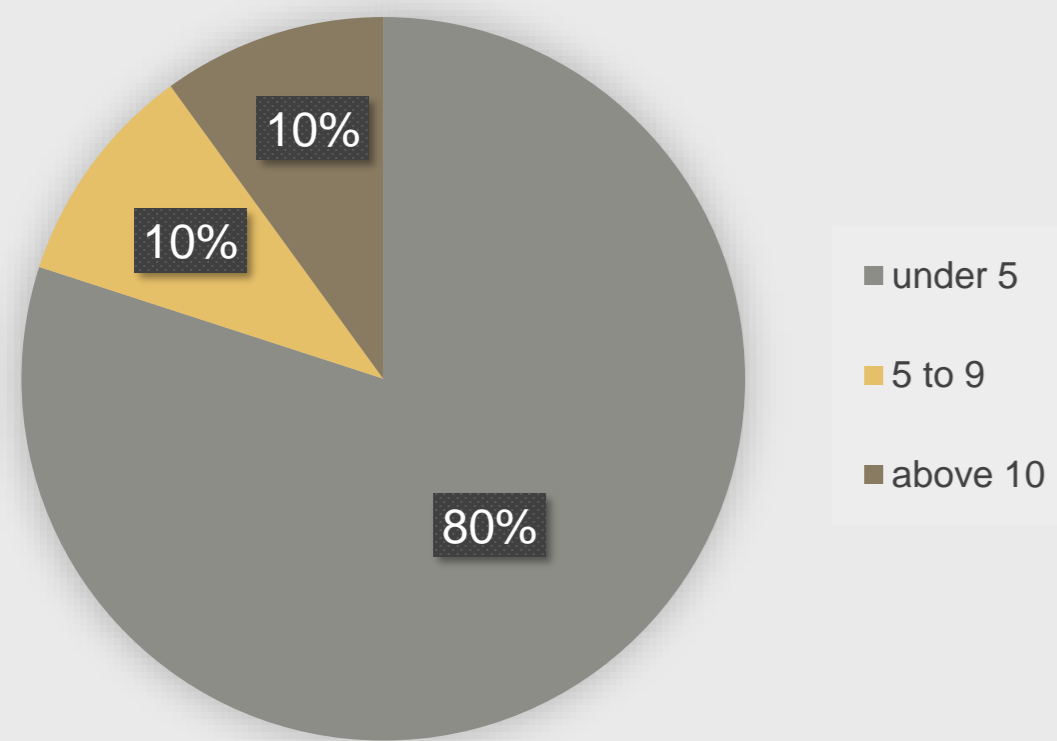
How Often Travelled Overseas (times/year)



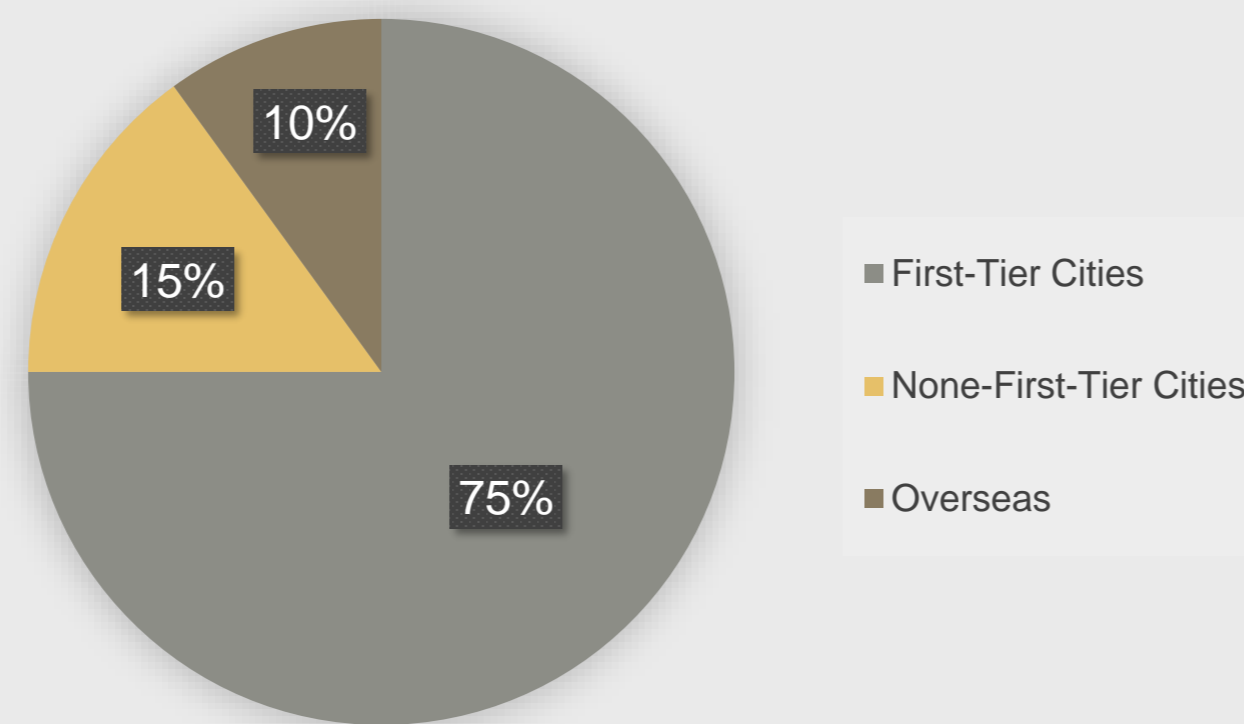
Number of Countries Visited



Time on phone (hours/day)



Cities of Residence



Relevant data was extracted from collected social media items and individual interview transcripts, clustered and quoted under themes of travel “motivation and information source” and “travel experience and barriers”.

The analysis is provided to show how Chinese HiSpFITs learn about Nordic destinations, what they expect to see and do there, what their experience was and what problems might prevent them from going there or visit again. The demand analysis identifies challenges and opportunities that Nordic destinations face in sustainably developing the Chinese HiSpFITs market segment.



DEMAND PERSPECTIVES

TRAVEL MOTIVATIONS AND INFORMATION SOURCE

Qyer is a dedicated outbound travel-only UGC platform and an important source of destination information and inspiration for HiSpFITs.

Movies, TV shows and reality shows are increasingly becoming Chinese HiSpFIT travellers' source and inspiration.

Chinese HiSpFITs' travel inspirations to Northern Europe are even more highly diversified





”

I go to Qyer for information every time before a trip. And this time the preparation was quick. I only read about 10 travel notes and got everything done.

I think a lot of people going to Iceland and Greenland had been asked to watch The Secret Life of Walter Mitty. The story started in Nuuk. However, the movie pictured Nuuk as a town of few residents, which is wrong..”

Northern Europe, a magic region I've dreamed for long. There is fairy tale kingdom and pure nature everywhere. Anderson wrote beautiful stories here, Ibsen wrote plays here, Sibelius and Grieg created musical pieces here, Karl and Munch painted beautiful paintings here.

DEMAND PERSPECTIVES

TRAVEL MOTIVATIONS AND INFORMATION SOURCE

Some claims are emotional drives that are derived from an overall impression of the Nordic region.

Importantly, some Chinese HiSpFITs also stress their wish to get inspiration and information during their trips, as being stated by one interviewee in this report below.





”

I choose Sweden and Norway to spend New Year. I don't know why I have a feeling of a special relationship toward Northern Europe, maybe it's because Northern Lights, or snow which is rarely seen in south of China, or purity. I can't explain. I just want to come.

I like local culture and history. I go to art museum and history museum every time I go to a new country. I also like talking to local people. That's why I don't like staying in hotels. I prefer apartment. I'm confident of my language abilities so I like to get information from conversation.

DEMAND PERSPECTIVES

NORTHERN EUROPE

DESTINATION IMAGE AND BRAND

The destination image of Northern Europe among Chinese social media users is positive and, to Nordic DMOs' advantage, is perceived to be trendy.

There are a number of “signature attractions” that represent the typical image of the Northern Europe

Northern Europe's “signature attractions” are more than landmarks, but also include experience and themes.





”

I loved the blue sky and clear water when walking down from my hostel to Tórshavn. No traffic, no tall buildings. Coloured buildings lined up on the street. This is a typical Nordic city. Copenhagen is the same, Stockholm is the same, so is Tórshavn.

Northern Europe doesn't only have amazing views, but also neat designs. From architecture, furniture to art design, are all impressive and amazing.

It's our first trip to Europe and we decided to drop South, East and Central Europe and instead go to Nordic region which is safer.

DEMAND PERSPECTIVES

NORTHERN EUROPE

DESTINATION IMAGE AND BRAND

Due to the distance and lack of direct flights to some Nordic destinations, it has actually triggered Chinese social media users' decision to broaden their trip to include more Nordic countries than their targeted destination.

Despite a number of Chinese social media users describing the weather and climate in Northern Europe as being “gloomy”, “low temperature” and “cold”, there are also many simply disregarding such concern and embracing the weather.





”

I came to the conclusion that Ilulissat was the best place in Greenland, also a World Heritage site. I certainly don't want to go to Greenland alone, so the whole Nordic plan came up.

Better wear skiing pants. Doesn't look good but it can shield wind and humidity. I bring the feather coat I wear in Beijing and it's enough. Don't need to buy new ones. Northern Europe isn't that cold.

DEMAND PERSPECTIVES

NORTHERN EUROPE

TRAVEL EXPERIENCE AND BARRIERS

A unanimous impression among Chinese social media users of the Northern Europe is that the travel cost to Northern Europe is high.

Some Chinese social media users complained that some tourism resources are limited and hard to book.

Chinese social media users also give compliments to tourism services they received during their trips to Northern Europe, considering product and service quality worth the price.



”

The Nordic hotels are driving me crazy, so expensive and hard to book. Glass Igloo in Finland, Santa Claus hotel, Grandpa hotel in Abisko...you need to book at least 6 - 7 months in advance. And you can only book via official website but not Booking.com or Agoda. And the website is in English.

For tourists, obviously we are not the ones to enjoy good social welfare. Scenery wise, everyone has different standard and preference; History wise, Middle East has more to offer. So what's the most impressive thing of Northern Europe – the cost! Everywhere is so expensive.

The whole of Northern Europe is expensive, especially Iceland and Norway. You can hardly find hotels except in big cities. But there is homestay, which provides everything and is comfortable. Some homestay doesn't have private bathroom, but the public bathroom is clean.

DEMAND PERSPECTIVES

NORTHERN EUROPE

TRAVEL EXPERIENCE AND BARRIERS

Collected social media items show the experience of going to and moving within the Northern Europe was in general positive.

Self-driving enables Chinese travellers to go from one point to another point within the Northern Europe with considerable level of freedom. Therefore the news that Finland joined other neighbours in the Nordic region in allowing Chinese driving licenses was very warmly received.

Another theme that emerged during netnography analysis frequently was Chinese social media users' compliment to "friendly locals".





”

The easiest way to go to Stockholm from Helsinki is taking Silja Symphony.

You can have a good night sleep, do shopping in the tax free shops, eat all kinds of food and enjoy all kinds of entertainment.

Norway and Sweden both accept Chinese driver's license. As long as you have a translated or notarised document, you can rent cars.

My expectation was wrong. People were not cold but surprisingly warm-hearted, some would even walk me to the address when being asked for directions; bus drivers would send us to the right station; and dog owner would brag about his pet training with us on the street.

DEMAND PERSPECTIVES

ÅLAND ISLANDS



DEMAND PERSPECTIVES

ÅLAND ISLANDS

DESTINATION IMAGE AND BRAND

Åland Islands do not stand alone as a single destination but can be part of a rather in-depth visit to Finland.

TRAVEL EXPERIENCE AND BARRIERS

Being in Åland Islands, Chinese social media users generally not very impressed by the Islands.





”

I'm taking my mum to Finland from late September to early October 2017... Maybe Turku+ Åland 2 days, Vaasa and Kvarken 2 days, Oulu 1 day, Kemi 1 day.

It's a ghost island! I can't even see one person. Very boring. Don't be tempted by the low price.

The little towns in Åland Islands are no different from ordinary towns in the USA.

DEMAND PERSPECTIVES

DENMARK

DEMAND PERSPECTIVES

DENMARK

DESTINATION IMAGE AND BRAND

Denmark is perceived to be a destination that is similar to others in continental Europe: its canals, modern architectures and shopping opportunities are praised by Chinese social media users.

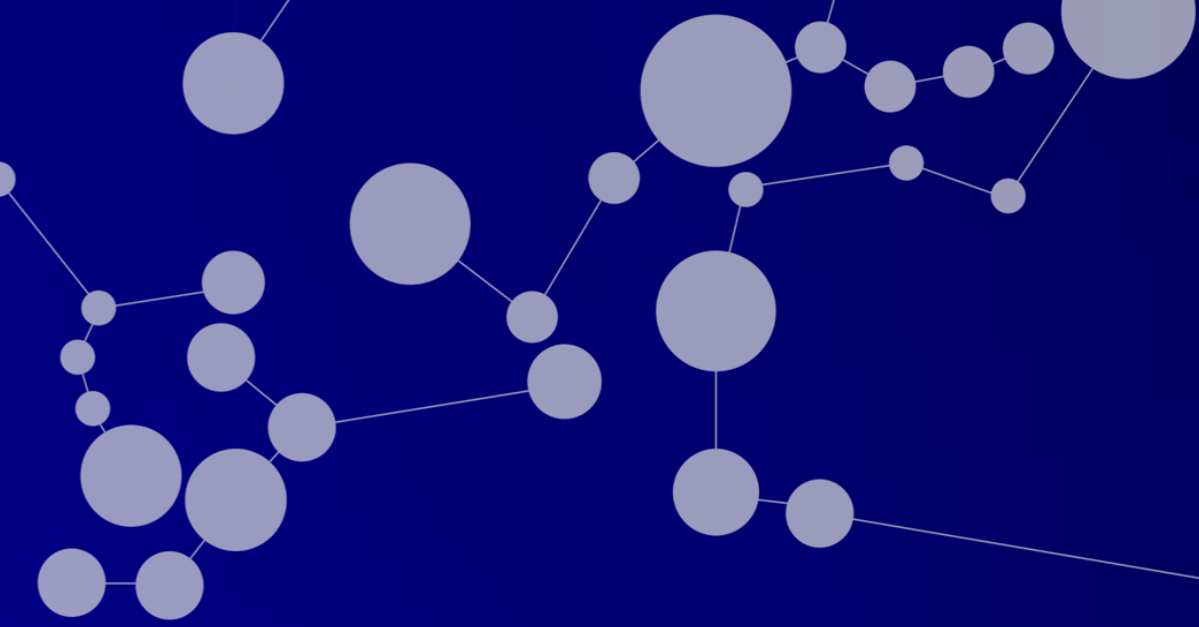
Denmark is well-known as the hometown of Hans Christian Andersen, therefore the famous Little Mermaid's statue is almost a must-do among Chinese social media users who travelled to Denmark. However, Legoland has increasingly attracting both Chinese family visitors with kids and young visitors who grew up with Lego – together with the Tivoli Garden and easy flight access, Denmark is labelled as suitable for families.



”

My shopping mode started after visiting City Hall. I only had half a day so I had to squeeze every second! The main Copenhagen shopping street starts from City Hall and ends at New Harbour; it's a very good place for shopping.

Denmark is Lego's home. Lego toys are a dream for children. Every man wants to receive a Lego technical product as birthday gift. We didn't have Denmark in the trip originally, but to realise my husband's dream, we added Billund's Legoland into itinerary



DEMAND PERSPECTIVES

DENMARK

TRAVEL EXPERIENCE AND BARRIERS

Copenhagen is commented as a lovable city offering diversified elements.

Chinese social media users enjoy sharing their experience of how they interact with the local, and some of their experience in Denmark praised warm Danes that they met.

Denmark is associated as the home of Hans Christian Andersen and welcomes large number of Chinese tourists to visit of the Little Mermaid or hometown of the famous author; however, there needs to have more and fresh elements to offer to draw more arrivals and to go further beyond Copenhagen.





”

I love Copenhagen, every side of it. It gives you surprise from time to time. It's energetic but also can be quiet. The beauty is mixed with classic and modern elements. Plus, the boiled cot is very tasty at the Chinese restaurant, south of central station

We could communicate with Danes in English but the road signs and tags in supermarkets were in Danish. We couldn't read it. The platform of taking trains could change at any time, so ask locals for help. They were warm and friendly.

I knew the little mermaid was a boring attraction. There were so many people. I heard the rustle hustle as I walked closer. I didn't get too close, just took a picture from distance and left.

DEMAND PERSPECTIVES

DENMARK

TRAVEL EXPERIENCE AND BARRIERS

Tivoli Garden and Legoland are considered to be fun attractions.

Copenhagen holds a reputation as being a shopping heaven with a wide range of well-known Danish brands among Chinese consumers. When compared to other Nordic cities, the travel cost is also perceived to be more acceptable by Chinese social media users.





”

Tivoli is my only favourite. I went during Christmas, the decorations made it into a fairy tale world. It was beautiful like heaven, not the childish beauty..

I bought so many stuff for my friends, B&O, Pandora, Moohko and Lego. They were so happy and asked me when I would go to Denmark next time. God! Stop asking me to bring stuff. How about you going there some day. You will be impressed by the view, the food and the people.

DEMAND PERSPECTIVES

FAROE ISLANDS



DEMAND PERSPECTIVES

FAROE ISLANDS

DESTINATION IMAGE AND BRAND

Faroe Islands are described by Chinese social media users as being a wonderland with “gloomy beauty”; meanwhile, they find the Faroe Islands to be exactly as what the promotional slogan by Visit Faroe Islands saying, “unexplored and isolated”.

The inclusion of Faroe Islands in National Geographic’s Chinese edition and the description of Village Gasadalur has become strong inspiration for some Chinese social media users. .

During their trips on Faroe Islands, they not only tried to verify the image they had of Faroe Islands, but also often discovered new attractions to share with other social media users.





”

What motivated me to go to Faroe Islands dated back to 3 years ago when I read an introduction of Gasadalur, the world's most isolated village. The picture intrigued me. I'm always fascinated by the road less travelled and I had decided to visit Gasadalur someday

Gjogv is beautiful, but not as great as its fame. In fact, many villages in the Faroe Islands are very beautiful too and Gjogv is definitely not the only one.

Gasadalur used to be the most isolated village. Postmen had to use a path that crossed over the lowest and flattest point of the mountains. You can drive now but you can still hike via the old postal route.

DEMAND PERSPECTIVES

FAROE ISLANDS

TRAVEL EXPERIENCE AND BARRIERS

Most of Chinese social media users who have been to Faroe Islands are amazed by its extremely beautiful natural scenery.

Faroe Islands' "gloomy beauty", tranquillity and extraordinary encounters with nature together frame out what attract Chinese visitors = a chance to escape one's mundane

Some Chinese social media users specially mentioned about their pleasant experience of interaction with the local. Such experience is essential for DMOs to promote





”

I can't forget Faroe Islands for a long time. I watched the video I shot there. I hope that more people will know this beautiful and lonely place.

I arrived in Klaksvik in a drizzle. It caught my breath by its gloomy beauty.

In Klaksvik they offer free wifi in Information center. And the staff tried to help me out even though we couldn't speak the same language.

DEMAND PERSPECTIVES

FINLAND



DEMAND PERSPECTIVES

FINLAND

DESTINATION IMAGE AND BRAND

Finland started gaining much stronger attention after focusing on promoting Finland's signature attractions in the Chinese outbound market - Northern Lights, Santa Claus Village, snow and winter. These established brands of Finland are well known to Chinese social media users.

In particular, Finland is strongly associated with Rovaniemi and Lapland.





”

I finally realised my dream in the Northern Lights peak year. When I first heard about Aurora, I had no idea until I saw a picture taken in Lapland. I was so attracted and determined I would chase the magic light once in my life time.

Rovaniemi is a quiet town. It has summer breeze, winter snow, spring flowers and autumn moon. What a nice place. Most importantly, it has Santa Claus Village and Northern Lights. What else do you want?

DEMAND PERSPECTIVES

FINLAND

TRAVEL EXPERIENCE AND BARRIERS

Helsinki and Finland seem giving Chinese social media the impression of two extremes.

Positive dining experience was shared among Chinese social media users after their visit to Finland.





”

The city center of Helsinki is very small; one day is enough. There is free city walk every week and you can meet people from all over the world. Renting a bicycle and ride along the coast is a good idea.

There are big shopping malls and night clubs.

What I like the most is the wide and clean street.

Helsinki is a bit disappointing. Prices are high. The city and its people seem inactive. It doesn't look like a rich country with good social welfare and high happiness index.

My daughter likes Helsinki. Mei Lin Chinese Restaurant has authentic Sichuan food, especially fried spicy pork and pickled fish.

DEMAND PERSPECTIVES

FINLAND

TRAVEL EXPERIENCE AND BARRIERS

A wide range of activities were recommended by Chinese social media users, giving the impression that Finland has more to offer than Northern Lights, and visitors can enjoy an active winter there.

Rovaniemi, Vuokatti and Lapland have become known names with specific associated activities among Chinese social media users.





”

You can see polar bears at Ranua Wildlife Park. It's the most popular place for family trip in Lapland. The wildlife looked so energetic there. I thought they must be sleeping.

Ice floating – recommendation rating: Five stars, highly recommended. Imagine yourself floating on the freezing lake in Arctic. No matter is day or night, you can enjoy the polar views around you and experience the thrill.

Finland is romantic and charming, like a fairy tale. My first encounter with the country happens at Vuokatti, a town by the lake. Dog-sledding, skiing resort where the national team train in, Finnish sauna, and the ray when I look up into the sky.

DEMAND PERSPECTIVES

GREENLAND



DEMAND PERSPECTIVES

GREENLAND

DESTINATION IMAGE AND BRAND

Greenland is a household name in China due to almost everyone's geography studies in school. A trip to Greenland can be prestigious; however, as a more recently known destination, many Chinese social media users consider there is only inadequate destination information.

Despite that Nuuk is one of the most visited areas among Chinese visitors who have been to Greenland; Ilulissat, as many other World Heritage sites hold high reputation and is considered as a must-see in Greenland.





”

Iceland has been my dream for long. I got a one-year validity visa when I applied for Schengen last time. Greenland is a well-known place. I guess many people had these questions from childhood when reading the map.

Based on the blogs on qyer.com, most tourists go to Nuuk, the capital and largest city of Greenland. It's the most developed area. The infrastructure and service is good. And there are many hiking routes to surrounding destinations. The easiest way going to Greenland is from Reykjavik, better than going from Denmark.

DEMAND PERSPECTIVES

GREENLAND

TRAVEL EXPERIENCE AND BARRIERS

Tourism services provided by service providers in Greenland seem not meeting the standards of Chinese visitors – as explained by some Chinese tourism experts explained in interviews: when the cost of travelling to Greenland is almost prohibitively high and only affordable for those well-off Chinese visitors, their expectation is thus accordingly high.





”

About East Greenland tours (including Iceland self-driving), you can find information online. The price is ranged from 60,000 - 80,000 RMB with air ticket and everything included. Not many travel agents have East Greenland routes.

Very inconvenient wifi connection and it is yet expensive to get online.

DEMAND PERSPECTIVES

ICELAND



DEMAND PERSPECTIVES

ICELAND

DESTINATION IMAGE AND BRAND

Iceland, despite only emerging as a “hot” destination in recent years, has caught up with many of its Nordic neighbours and even become one of the most desired destinations on Chinese visitors’ bucket lists.

The diversity of attractions that Iceland offers also gives Iceland the advantage of being both a summer and winter destination – as described by Chinese social media users.

Some Chinese social media users consider the travel cost to Iceland to be prohibitively high; therefore, to include another destination to Iceland is not only necessary to get flight connections, but also is perceived as good value at this stage when there is no direct flight connection to Iceland.



”

Iceland has been my dream for long. I got a one-year validity visa when I applied for Schengen last time so that I could take an impulsive trip to Iceland.

Endless glaciers, grassland and cute Icelandic horses, Northern Lights, No.1 Road. There were all my motivations and reasons why I took the trip.

Expensive, really expensive. Crazy, really crazy. Those were the words I kept mumbling when I booked Iceland hotels. 80% of the population lives in Reykjavik. Most parts of the country are uninhabited areas. You couldn't find hotels but only B&B outside the capital. Even the B&Bs were ridiculously expensive.

DEMAND PERSPECTIVES

ICELAND

TRAVEL EXPERIENCE AND BARRIERS

The uniqueness of Iceland is of course Iceland's main draw card to Chinese visitors. It is so unique that some Chinese social media users are considering visit it again.

Some travel tips were share about Iceland's famous itineraries, including where to do, what to see, what to eat and how to go around.





”

Iceland is a very unique country, no tall buildings or busy crowds. Only the volcano rocks on both sides of the road and gloomy weather. Blue Lagoon Spa is my favorite so far. We didn't see the Northern Lights because we went in the summer. I wish we could go again sometime soon in winter.

- 1. Self-driving is highly recommended.*
- 2. The Golden Circle doesn't worth too much time. There are many other attractions better than it to see in Iceland*
- 3. If you only want to see the Northern Lights, go to Nordic. Iceland has a lot more to offer*
- 4. The hotdogs taste mediocre.*

DEMAND PERSPECTIVES

NORWAY



DEMAND PERSPECTIVES

NORWAY

DESTINATION IMAGE AND BRAND

In Chinese social media users' comments, Norway has a wide range of elements and attractions – besides many magnificent Fjords, to experience the polar night or midnight sun in Lofoten and to watch Northern Lights in Tromsø are also popular among Chinese visitors. These attractions are recommended in collected social media items as established brands of Norway.

The wide distance between Norwegian cities and the range of activities emerged in social media items collected for this report is a positive sign of tourist dispersal both spatially and temporally. Norway is worthy a dedicated trip just on its own, as commented by one Chinese social media user.



”

Norway, the origin of Nordic myth and hometown of Vikings, has been on my dream list for long. It has mountains and fjords. Most importantly, Northern Lights. It's so beautiful, mysterious and fascinating. In summer the sun doesn't go down till midnight.

My original plan for the winter trip was Finland + Sweden + Norway + Arctic circle. But it would cost too much time. And Norway is worth a separate visit. So I went to Norway solely for 10 days in November.

DEMAND PERSPECTIVES

NORWAY

TRAVEL EXPERIENCE AND BARRIERS

Despite being an expensive destination, Norway has been given positive comments by Chinese social media users. They appreciated Norway's signature attractions – Fjords, exciting activities, city architectures and still, the tranquillity that remains within all the hustle-bustle of tourism boom.

Chinese social media users' footsteps are widely spread in Norway, which is facilitated by the convenience of being able to rent cars. As mentioned earlier, to be able to drive and control the pace to travel more slowly.

While self-driving in Norway as part of interviewed HiSpFITs, there are complaints about parking emerged from all data sources in this project.





”

We joined a few tours in Tromso, whale watching is one of them. The official website said possibility of seeing whales is 99%, almost guaranteed! It had become a popular local activity.

Now renting cars becomes easier, and I guess it's because of competition. Companies are upgrading their service. We booked via Avis and picked up from Tromso, then dropped the car at Evenes airport.

Some direction signs were not very clear. I felt difficult sometimes to find the right place. And their accent was quite strong, so English communicate was hard.

DEMAND PERSPECTIVES

SWEDEN



DEMAND PERSPECTIVES

SWEDEN

DESTINATION IMAGE AND BRAND

Stockholm is highly regarded and known as the Venice of the North among Chinese social media users; in addition, they call Stockholm as “Sijing” (the Capital of Sweden - 斯京 as similar to Beijing - 北京). Stockholm is perceived as being culturally rich.

However, the appreciation of Sweden’s culture is not extended to other part out of Stockholm; instead, tourism attractions and activities in Northern Sweden were recommended but with certain level of reservation.





”

Scandinavia is on the northwest part of Europe. From a tourism point of view, Sweden has comparatively rich resources, especially Stockholm which is most culturally unique city in Nordic region..

I saw the Northern Lights yesterday in the north of Sweden, Latitude 67.18. We were going south today and passed the Arctic Circle milestone. The road conditions in the mountain area of Sweden and Norway was bad. We could only go 60 miles an hour.

DEMAND PERSPECTIVES

SWEDEN

TRAVEL EXPERIENCE AND BARRIERS

Sweden holds a very positive reputation among Chinese social media users as being a country with quality of life, well-educated citizens and beautiful architecture.

However, Stockholm is the most frequently mentioned city, but it is hard to find many other Swedish cities or regions mentioned by Chinese social media users.





”

I'm sure you will be impressed when you walked out of the subway in Stockholm. It's not only the most beautiful city in Northern Europe, but the entire world as well!

I want to complain about Sweden Visa Center. So many additional fees, delivery fee, messaging fee... And as stated on internet, even though you provide your photo strictly by their standard, it can't pass. You have to take a photo there.

3. DATA ANALYSIS – Competition Analysis

1. INTRODUCTION

2. SETTING THE SCENE

3. DATA ANALYSIS

- Supply point of view
- Demand perspectives
- **Competition analysis**
 - Expert interviews
 - High Spending FITs
 - Competition
 - Branding and marketing

4. FINDINGS AND RECOMMENDATIONS

5. Q & A



COMPETITION ANALYSIS

No.	Companies	Positions of Interviewees	Justifications for Recruitment as Industry Experts	INDUSTRY EXPERT SELECTION
1.	Qyer	VP of Qyer and GM of Destination Marketing	Leading travel related UGC platform dedicated for outbound travel. The interviewee gave examples of successful destination marketing cases through Qyer.	<p>Selected experts are...</p> <ul style="list-style-type: none"> Having Nordic business Holding managerial positions Having direct involvement Having good knowledge <p>Diverse business</p> <ul style="list-style-type: none"> Diverse industry sectors Various size Different locations
2.	Ctrip	GM Destination Marketing (EMEA)	Largest Chinese OTA. The interviewee provided comments in the perspective of destination marketing and comparing the Nordic region to competitors.	
3.	LVMama	A: Destination BU Overseas Product Manager B: Administrative Deputy General Manager	Major OTA. Two interviewees discussed both group and FITs market segment from China to the Nordic region.	
4.	TongCheng (Suzhou)	A: Europe SBU Department Manager B: Europe SBU Line Manager	Major OTA. Two interviewees explained their needs to cater to a growing HiSpFITs market in their business.	
5.	CITS Headquarter	Director of Europe Department	One of the largest Chinese state-owned traditional brick-and-mortar travel agents. The interviewee is in charge of its newly established customised travel department.	
6.	Beijing Albatros Travel Service	General Manager	One of the very few Wholly Foreign-Owned Enterprise and specialised in luxury, customised tours and special interest travel. The interviewee provided insights of where Nordic destination stand for luxury travellers.	
7.	BM Trip	Outbound Long-haul Product Manager	Leading customised tours provider. The interviewee explained what interests clients taking customised tours.	
8.	Unique Way	Product Manager	Leading customised tours provider. The interviewee explained what interests clients taking customised tours.	
9.	Finnair	Global Sales Director	Nordic destinations' key strategic partner in developing the Chinese market. The interviewee specified what they have done to cater to the Chinese market.	
10.	Orange Way	Product Manager	Small business group and MICE organiser mainly having groups to Europe. The interviewee identified some difficulty for Chinese visitors travel on their own to the Nordic region.	

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COMPETITION ANALYSIS

11.	Nordic Choice Hotels	Key Account Manager (China)	Chain hotel group with hotel properties across several Nordic destinations. The interviewee noted they have small share of FITs but expected to see strong growth.
12.	Jetour	A: Senior Planning Manager B: Product Manager C: General Manager (Planning)	Major Hong Kong based tour operator supplying Nordic products. Interviewees revealed the development of Nordic products and the changing taste of Hong Kong visitors towards the Nordic.
13.	GuoGuo Travel Studio	Founder and General Manager	Catering to customised and small family travellers, based in Chong Qing. The interviewee supported more product training from Nordic DMOs.
14.	Mioji – B2B meta search	Vice President of Public Relations	Leading platform providing B2B services, signing destination suppliers directly. The interviewee stressed the limited capacity of tourism infrastructure in the Nordic region.
15.	Shile Life	Founder and Director	Leading customised tours providers based in Shenzhen. The interviewee expressed the necessity to receive more product training in order to develop more Nordic products for their customers.
16.	Tallink Silja Line	Country Manager (China)	A major cruise service provider in catering to the Chinese market. The interviewee observed the difference between FITs and group travellers' difference in demands in their products.
17.	Tuniu (Nanjing)	European Product Manager	Large Chinese OTA in vacation products. The interviewee identified the importance of developing products with themes for Nordic destinations.
18.	Blogger	Freelancer	A travel and lifestyle blogger. The interviewee explained what his followers expect to read about the Nordic region.
19.	WeGo Outbound Customised Travels	General Manager	Luxury and customised tours provider, based in Ma An Shan (3rd tier city). The interviewee provided the insights of what customers from lower cities require to travel to the Nordic region.
20.	Mustard Seed	FIT Segment Product Manager	Leading tour operator focusing on product and services to Northern Europe. The interviewee revealed there are lots of space to develop the HiSpFITs market segment further.

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QUESTIONNAIRE

- 1) What Nordic products/services do you provide to your higher spending (and/or FIT) customers?
- 2) How do you market to and attract these higher spending (and/or FIT) customers?
- 3) Which Chinese cities/regions are your current major source markets? Will this change in the next 3 to 5 years?
- 4) If you are also selling products/services of other destinations, how do you compare Nordic region to other international destinations? What are Nordic countries' competitive advantages? What are their weaknesses?
- 5) What opportunities and challenges do you consider that Nordic countries face in attracting higher spending (and/or FIT) customers in the near future?
- 6) Please make some comments about individual Nordic destinations when relevant.
- 7) Do you think Nordic destinations should market under common brand(s) or promote individually in order to attract higher spending (and/or FIT) customers?



HiSpFITs

- **HiSpFITs in experts' view**
 - ✓ Package group remains important segment while FITs and customised tours grow extremely fast.
 - ✓ HiSpFITs do not often require expensive products, but are rather often attracted by “uniqueness, service and details”.
 - ✓ HiSpFITs often have a clear mind of how their trips should be.
 - ✓ HiSpFITs can travel in smaller sized groups, and the maximal length they are willing to stay at one destination are no more than five days.
 - ✓ HiSpFITs do not include too many countries into one single trip.
 - ✓ The frequency of travelling overseas is visibly increasing among HiSpFITs.
 - ✓ HiSpFITs have high level of learning and acceptance for new things and niche destinations.
 - ✓ The attitude and level of services in Scandinavia needs to be improved to welcome more FITs.



Strengths

- Interviewed experts agreed almost unanimously that Nordic destinations' strength is its unique nature, and a number of signature activities such as chasing Northern Lights, taking an icebreaker cruise, riding the scenic train viewing Norwegian Fjords or staying in glass igloos.
- Additionally, even the diversified means of transportation in the Nordic has become part of the indispensable Nordic experience during a trip.

“Chinese travellers are following the “travel like locals” trend, especially FITs to experience the local culture. We can see growing number of Chinese travellers onboard our cruise ships are enjoying the cruise, such as watching onboard entertainment, visit the bars and club, shopping for local souvenirs, etc.”

- Besides these tangible tourism attractions and activities, the Nordic culture and lifestyle also attract Chinese HiSpFITs – travel is the means to be able to experience and feel these intangible attributes of a place. Interviewed Chinese and Hong Kong experts also pointed out that the Northern Europe is perceived to be safe thus attracts Chinese HiSpFITs and, in particular, families travelling with their children or sending their children for summer/winter camps to Nordic destinations.

“Nordic countries hold a friendly relationship with China. Safety is ensured. Chinese run business in Nordic region. There are Chinese restaurants and shops in 1st and 2nd tier cities in the Nordic region.”

- A number of interviewed experts stressed that their companies focus on providing excellent customer service. As they stated, currently the Nordic products are relatively more expensive than other long-haul or European ones, therefore their customers also have a higher level of expectation. HiSpFITs, in interviewed experts' view, are generally more experienced travellers and having more specific requirements.



Weaknesses

- Most interviewed experts pointed out that Nordic products are expensive ones, which is consistent with findings in demand analysis. They further pointed out that the seasonality of Nordic products and the inadequate capacity of tourism infrastructure that exacerbate the issue of travel costs.
- Interviewed experts mentioned a number of aspects of the Nordic tourism infrastructure should be given attention to, if HiSpFITs are targeted, including transportation, shopping, closing hours, slow check-out in hotels.
- Some solutions to these concerns may be advancement of technology in providing better navigation apps or destination information apps. But when the concern is caused by the difference of lifestyle between China and the Nordic region, there is less need for Nordic destinations to make changes but rather provide creative alternatives and facilitate cultural communications. In South Korea, for example, Chinese visitors are provided with shopping apps through which they can order goods online during evening time, then pick up their orders in the next day from department stores.
- A number of interviewed Chinese experts remarked that the work with Nordic service providers was not successful. Others pointed out that the quality of services that Nordic suppliers provides may suit other European or American clients well, but such quality of service is considered inadequate among Chinese visitors, if compared to what Japanese or Australian suppliers can provide.

“Communication with local hotels wasn’t successful. We don’t have direct connection with local operators... They (Nordic suppliers) have good products and want to promote it, but they worry too much if they can get enough customers.”



Weaknesses

- Despite there is an outcry among some interviewed Chinese experts that new and interesting Nordic products should be developed, and current Nordic products are identical and lack of novelty. Nevertheless, one expert whose company is dedicated to quality travels to Northern Europe exemplified how to make changes through their cooperation with regional tourism boards and product development.

“We started cooperation with Visit Vuokatti last year. They signed a contract with China about the training grounds for Winter Olympics. Chinese athletes will go to Vuokatti for training, such as skiing. Vuokatti is famous for being a training ground for China for Winter Olympics. Ten years ago, Vuokatti was very popular for Russians, so they have solid infrastructure. But these years saw a drop as the Russians do not go there anymore.”



Opportunities

- Some interviewed experts attributed the current honeymoon period of high growth of Chinese arrivals to the Nordic region to its novelty.

“The Nordic region has museums, Legoland and IKEA. They can learn from Germany which has built a series of car museums. I think they should brainstorm what do they have and what do Chinese tourists like, and then find a promotion key message for different segments.”

- Themed tours, Arctic products and business groups can all be some areas that the Nordic DMOs can give more efforts in product development and promotion.

“The Northern Light is a sales point but it’s not as a highlight as it used to be. It got destroyed by too many guests. We don’t use it very much, we use Arctic culture and Eskimos. Fliggy sells about 1,400 -1,500 USD to Finland. It brings 4,000 -5,000 people.”

“Chinese care about food very much are not satisfied by a simple meal. If they could provide decent and creative local food, I think it would attract customers. Again our clients are high-spending FITs, so they have high expectations in regard to arrangement and service.”



Branding and Marketing

- Interviewed experts – both Nordic and Chinese – concurred that brand building is a long term commitment, so is product marketing.
- The key branding and marketing message to Chinese trade needs to be more clear and better specified.

“The Nordic tag is nature, but it doesn’t give tourists a strong reflection. The views in four Scandinavian countries are similar. They don’t make themselves stand out. So nature is originally an advantage, but overusing turns it to a disadvantage.”

“Themed tours can attract customers who are interested and some themed tours can offset seasonality. Look more closely what the clients want, photo or education or Arctic food. Boost brand awareness, Arctic brand. We have a photography association for serious amateur photographer.”



Common Brand or Individual Brands?

- When it comes to answering the question whether Nordic destinations should have a common brand as “Northern Europe” or have individual brands to market to HiSp Chinese FITs, there are different voices.
- Most experts voted for a mixed branding strategy to have both a common brand and individual brands; more specifically, the umbrella (common) brand can be useful for package group segment, and individual brands to make Nordic destinations standing out from competitors.

“Personally I wish to see each country has its own theme so that the traveling experiences are more in-depth. I’ve got inquiry from FIT clients that they just wanted to visit one country for seven to ten days. And branding under a big umbrella sounds like a good idea for group tour.”

“Faroe Islands and Åland Islands are not as well-known as Greenland. I think Greenland can stand up and do their promotion alone, like Iceland. Iceland is really popular around the globe. There are all kinds of products, Scandinavia plus Iceland, UK plus Iceland, Southern Europe plus Iceland, just to name a few. So Greenland can learn from Iceland. I think marketing individually is a better way. Finland is an example. They have done so much in recent years, regardless of online or trade fair.”



4. FINDINGS AND RECOMMENDATIONS

1. INTRODUCTION

2. SETTING THE SCENE

3. DATA ANALYSIS

- Supply point of view
- Demand perspectives
- Competition analysis

4. FINDINGS AND RECOMMENDATIONS

5. Q & A



Business Ecosystem of The Chinese Outbound Tourism Industry

Wholesaler/Large Tour Operators

- Wholesale travel agencies cater mainly for package group business. Many of them are expanding their distribution networks by setting up branch offices or sales representatives in secondary and other third tier cities.
- There is a growing trend that some wholesalers also penetrate to retail operations within the same business and are recognised as both wholesalers and retailers.

Retail Agents

- Many retail travel agencies have been expanding their outlets or stores within China and are beginning to focus on FIT and customised tour products (thus HiSpFITs).
- There is often a blurred border between Chinese travel retailers and wholesalers.

Online Travel Agencies

- Online bookings are increasing at a greater rate than traditional channels, and the main service providers in serving HiSpFITs.
- Some online travel portals such as Ctrip.com, Qunar.com, Tongcheng.com and Tuniu.com have been successful in the market, particularly with air ticket sales and hotel accommodation bookings.
- Traditional travel agencies, either wholesale or retail, are making use of third-party portals to promote their products, such as Ctrip.com, Alitrip.com, fliggy.com and Tuniu.com

Inbound Tour Operators

- Inbound Tour Operators (ITOs) are a vital link in the travel ecosystem for the Chinese market. Traditionally ITOs served mainly package group business. Increasingly ITOs based in the Nordic region have started catering to HiSpFITs either directly through online bookings, or working in partnership with OTAs and China-based travel services providing customised tour services.



Recommended USPs & Branding

SUMMARY OF FINDINGS

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Chinese public generally thinks of Northern Europe as one region (excluding Greenland and the Faroe Islands) and looks into travelling to this region as a whole as opposed to individual countries. However their perception of Northern Europe is changing and increasingly recognising the Nordic countries individually. These FITs are opting to spend more time in fewer destinations in order to gain a deeper understanding of each country and what it has to offer.

The question of marketing in the Chinese market should follow a two- pronged approach, with both a joint “Northern European” brand and individual country brands. This branding strategy emphasises the different brands working in harmony in order to raise general awareness of the Nordic region while simultaneously maintaining individual brand messaging and objectives to promote high-spending FIT travel.

We categorise the Nordic brand and Individual DMO brands into 4 groups:

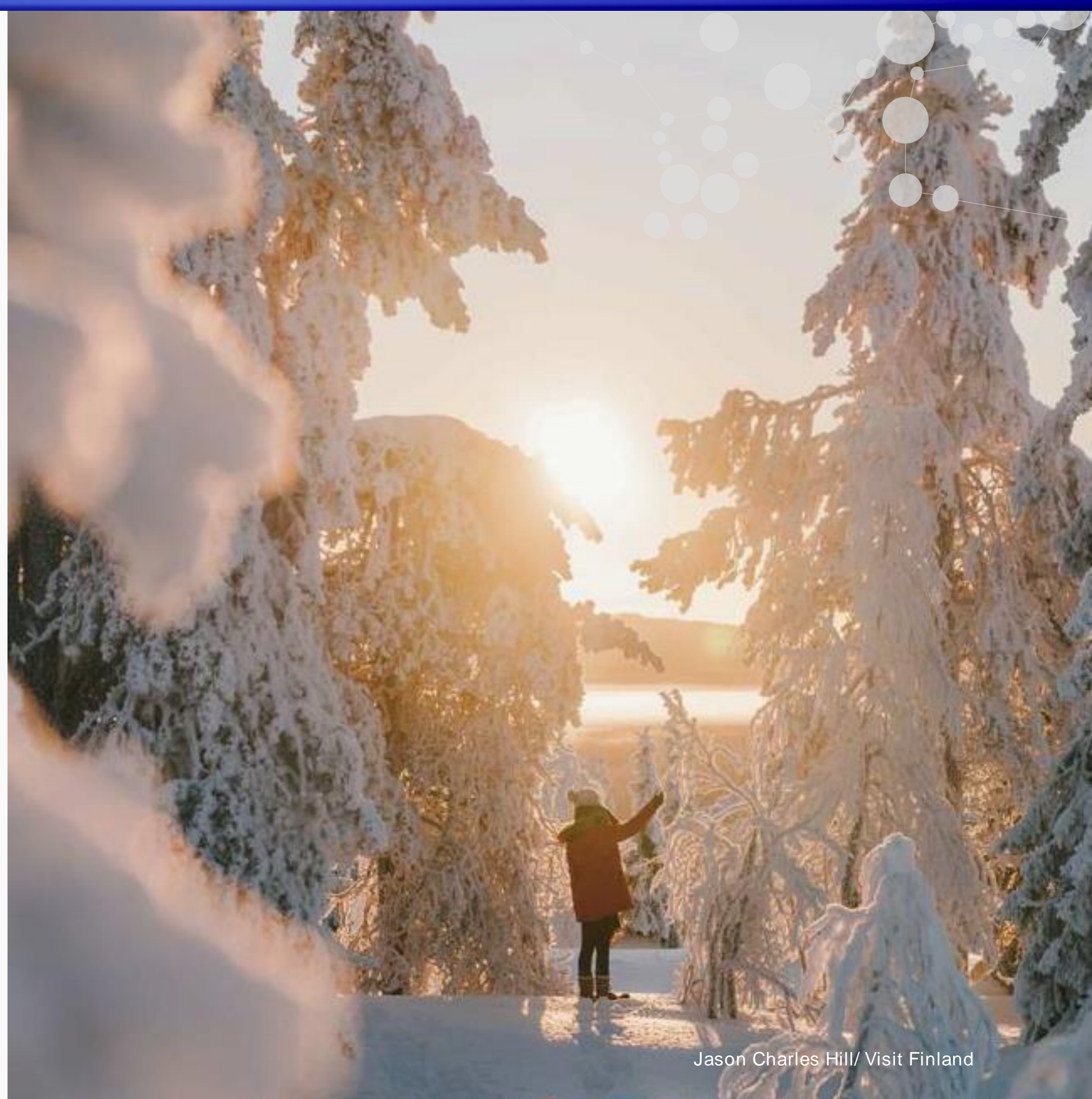
CATEGORY	INCLUDE	REMARKS
A: Northern Europe Brand	Nordic Region as a whole, including the eight countries of this study	Suggested brand for the Nordic region
B: Relatively Mature in China	Denmark, Finland, Norway, Sweden	Currently popular and extensive marketing efforts in china
C: On the rise in China	Iceland	Rapidly increasing awareness, though few consumer marketing undertaking
D: Starting ups	Greenland, Faroe Islands, Aland Islands	Low awareness in China and no visible marketing



The Goal of Nordic brand

SUMMARY OF FINDINGS

- Incorporating the eight brands of Finland, Sweden, Norway, Denmark, Åland Islands, Faroe Islands, Iceland and Greenland
- Serve as a central brand hub for the region. This brand will focus on promoting awareness of the Nordic area as a whole, as well as cross-border and themed travel.
- Brand messaging focus on Nordic USPs as a whole, such as the Northern Lights, winter wonderland, clean and pure environment and outdoor activities, to showcase the unique and diversified Nordic region and serve as a gateway to the region as a whole.
- The Northern Europe brand will work to open up conversations around individual countries by introducing individual destination USPs on a regular basis.



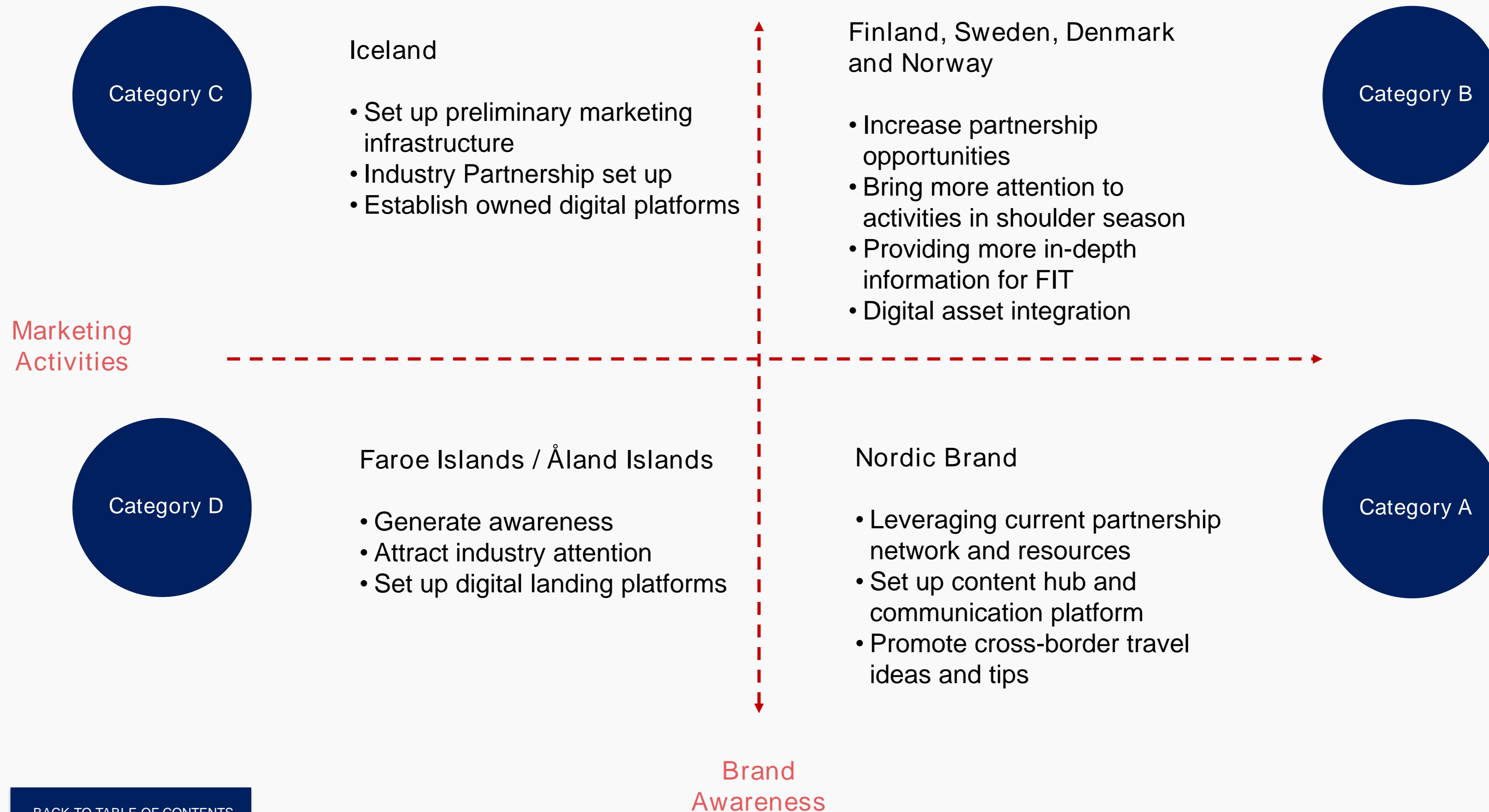
Goals of Individual country brand

SUMMARY OF FINDINGS

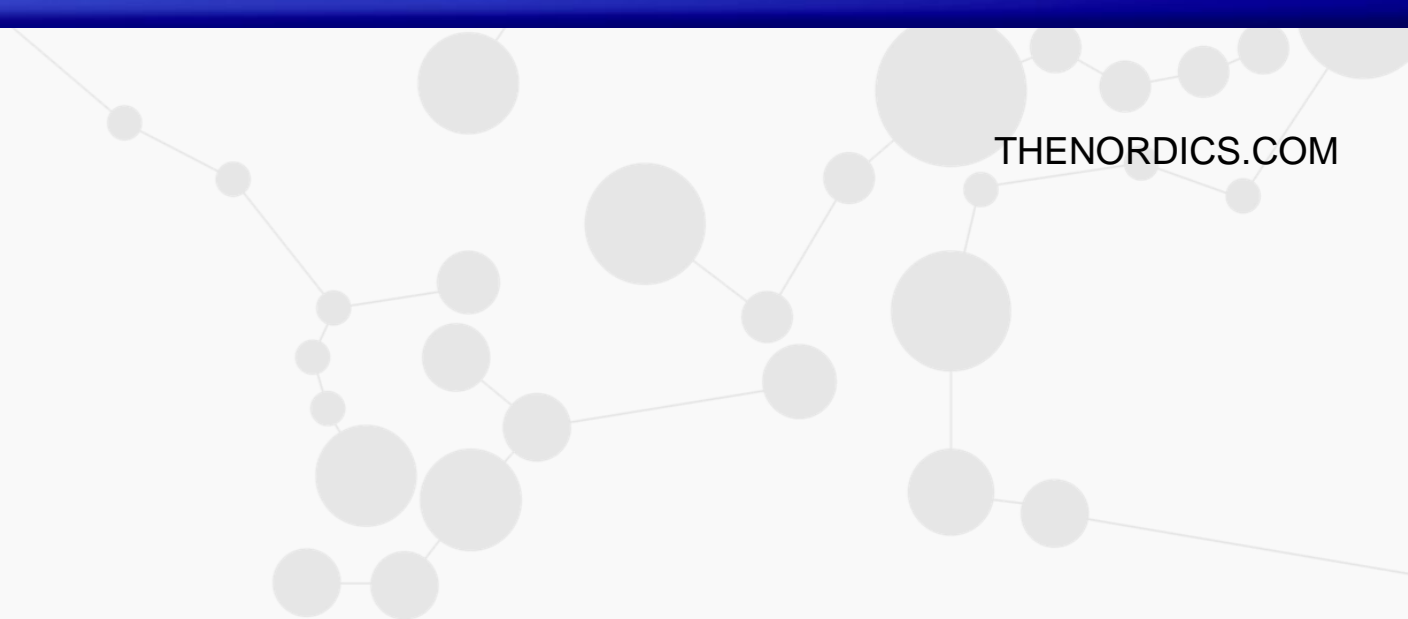
- Emphasise their unique selling points and display them for Chinese HiSpFITs
- Illustrate best experience as well as their place in the Nordic experience.
- Brand positioning in the market shall be broad enough to accommodate sustainable travel to their destination.
- Arctic Region Brand as alternative approach to keep exclusivity and luxury image



Recommended Marketing Strategy



Recommended Action Plan



PHASE 1

PHASE 2

PHASE 3



NORDIC BRAND

Set up the basic foundations

Cooperate with the broader travel industry

Further develop and expand the Nordic Brand

RELATIVELY MATURE BRANDS

Deeper integration and engagement

Always-on and seasonal campaigns

Customised themed trips to various tour operators

ON THE RISE/STARTING UP BRANDS

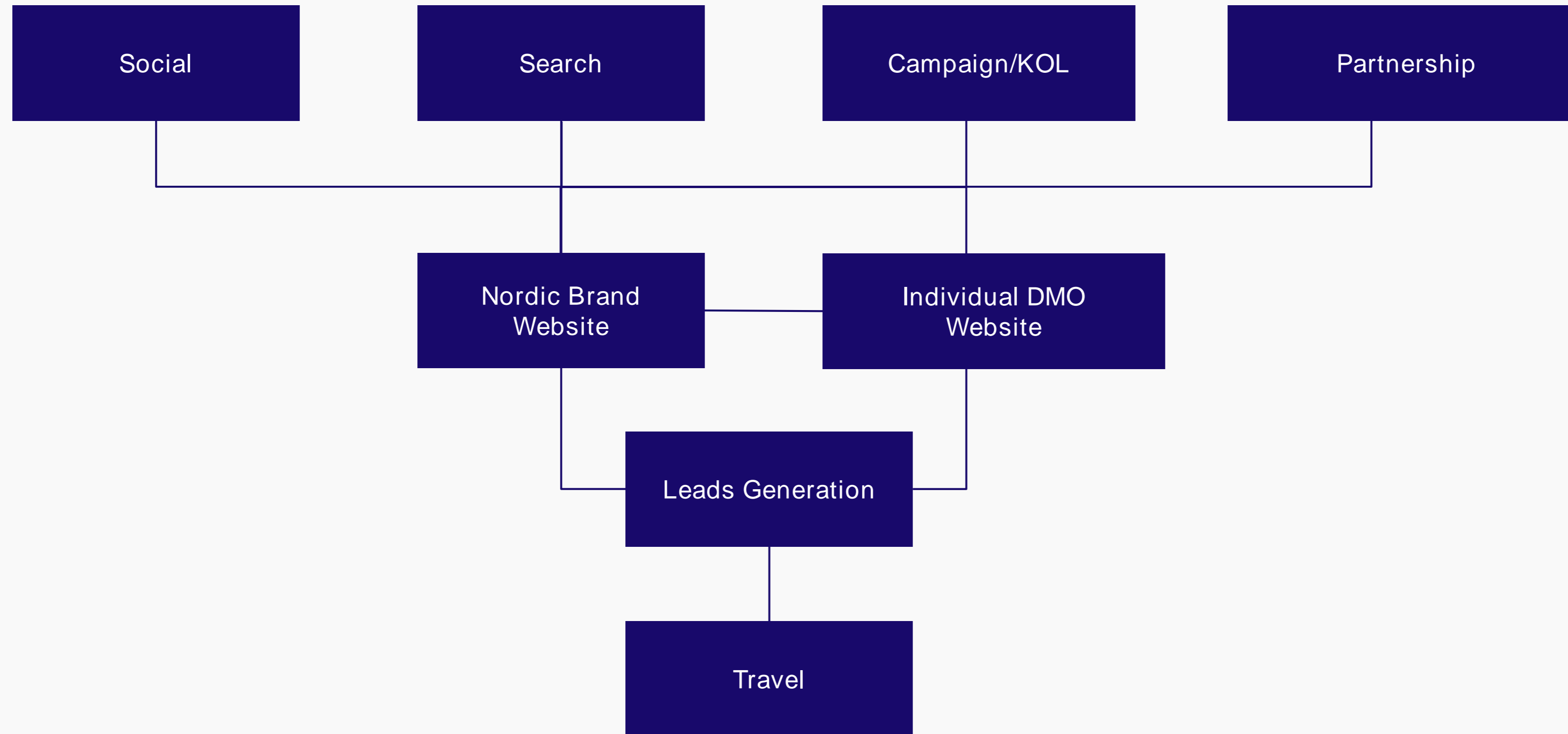
Develop the foundations

Joint marketing activities with Nordic brands

Further develop individual marketing strategies



Digital Ecosystem



Recommendations in Product Development

Based on interviews with industry experts, demand analysis and itineraries search, current offers on market with joint Nordic products have become to be perceived less appealing to experienced Chinese HiSpFITs. Fresh ideas and ways of reaching customers are required at the same time. This is a challenge, but is also definitively a rare opportunity for Nordic DMOs to purposefully develop products that aiming at alleviating seasonality and facilitating dispersal.

In order to better manage the seasonality and facilitate geographical dispersal of the Chinese market, we recommend

- Develop products and services that contain specific themes and activities that can be impacted less by seasons/climate and interest HiSpFITs market segment.
- Developing marketing strategies aiming at attracting repeat travellers, who tend to visit Nordic destinations in non-peak seasons, go further away from main gateway cities and stay longer in one destinations.
- Developing the market segment of Chinese senior travellers, connecting Nordic destinations with Baltic States or Russia.



Recommendations in Product Development

FURTHER DEVELOPING EXITING THEMES AND LANDMARKS

The potential solutions to the aforementioned issues can be the promotion of carefully-woven already-existing themed tours as well as activities organised into shorter trips with clear focus, such as

- Winter themes continue to grow
- White Night connected with local cultural or musical events or in-depth city visits
- Education for families and student camps
- Further developing landmark themes into hands-on experience: e.g. fairy-tale related activities such as theatre visits, workshops for storytelling, story writing and drama.

Furthermore, children can 'become' the character in a castle for half day



Recommendations in Product Development

FURTHER PROMOTING NORDIC ACTIVITIES

While still enjoying sightseeing, Chinese HiSpFITs are seeking to further engage in trendy experiences focused on activities and themes. Almost all soft Nordic adventures are attractive and considered as interesting to do by Chinese HiSpFITs visiting the Nordic region, some of them are must-do, while some are just learnt by Chinese visitors:

- Photographing the Northern Lights
- Dog sledding or reindeer sleigh rides
- Staying overnight in glass houses and ice igloos
- Kemi icebreaker cruises and ice swimming
- Finnish saunas and Iceland's Blue Lagoon geothermal spa
- Hiking
- Whale watching
- Hot air ballooning
- Ice karting
- Riding sightseeing helicopter
- Riding a snowmobile on glaciers
- Silfra fissure snorkelling
- Icelandic horse-riding
- Ice fishing
- Voukatti Lakeland bear watch evening tours
- Tromso puppy training at the Husky Home
- Frozen Olokolo Safari in Kemi
- Fishing for king crabs
- Feeding elk
- Snowshoe walking
- Berry and mushroom picking in forests



Recommendations in Product Development

INCORPORATING THEMES THAT ARE LESS WEATHER-PRONE

Finally, products can be developed under specific themes and activities that can be impacted less by seasons/climate, for example:

- Photography (all seasons)
- Northern European architecture and Scandinavian design
- Foodies' tasting trips and learning the healthy Scandinavian way of cooking
- Self-drive tours



How to sustainably grow the Chinese market

- In order to sustainably grow the Chinese market, the package group market segment should continue to be maintained and grown in a balanced manner along with the High Spending FITs segment.
- Therefore, Nordic DMOs need to strategically promote their destinations and products to other target groups, such as the identified High Spending FITs, than the package group market segment in order to sustainably grow the Chinese market.



Recommendations in Product Development

- In the next pages, we develop and adapt 15 products to demonstrate some already successful Nordic joint products, and some potentially appealing to Chinese HiSpFITs. The principle in product development is to integrate themes and activities in order to facilitate tourist dispersal and to alleviate seasonality for achieving goals of sustainability development from China.



Recommendations in Product Development

No.	Sample Itineraries Developed	Theme	Activity	Cities/regions	Destinations
1.	Family summer in Northern Europe 10 days	Family trip - (education, fairy tale, animals, make-your-cookie workshop, theme parks)	Kids spend a day in Experimentarium, parents go shopping. Tivoli Gardens, The Tinderbox, LEGOLAND, Arrhus Art Museum, The Iceberg, farm work and animal care, baking bread, IKEA museum, crafting workshop	Copenhagen, Odense, Billund, Aarhus, Småland, Almhult	Denmark Sweden
2.	Winter camp of nature and happiness - Vuokatti	* Student camp (Mustard Seed)	Crafting class, Geography class, cooking workshop, skiing class, Angry Bird Activity Park, Ranua Zoo, ice fishing, sauna	Helsinki, Vuokatti, Rovaniemi	Finland
3.	White Night (or cool summer) in Northern Europe 8 days	Summer - White Night (event, nature, activities) or simply cool summer	Alta Museum - World Heritage Rock Art Centre, Viking Line, Michelin restaurant, Midsummer's day, live show, flea market, golf, canoeing	Bodø, Pohjan Lahti, Rovaniemi, Finnmark, North Pole, Lofoten, Abisko, Stockholm, Soderkoping, Copenhagen, Helsinki	Sweden Norway Finland



Recommendations in Product Development

No.	Sample Itineraries Developed	Theme	Activity	Cities/regions	Destinations
4.	Essence of Lapland - 13 days or Ultimate Lapland - 20 days	Winter - Lapland and the Northern Lights	Reindeer ride, Santa Claus Village, Snow mobile, Northern Lights, Ice fishing, ice BBQ, Catching crab, Cable car to see city view at night, Whale watching, chase northern lights with city view, Summit viewpoint, Polar Zoo, World's No.1 northern light observation point, Stockholm (Royal Palace, metro, art)	Rovaniemi, Saariselka, Kirkenes, Tromso, Narvik, Abisko, Kiruna, Helsinki	Sweden Norway Finland
5.	Lapland and Nordkapp 16 Days Round Trip	Nordkapp catching King Crabs	Ice Bar, catching crabs, Sami tent and Sami-themed park, White night, reindeer farm, Santa Claus Village	Tromso, Alta, Nordkapp, Ivalo,	Norway Finland
6.	White Night (cool summer) Cruise	Summer - White Night celebration - Finland Lake District - cool summer, cruise	Midsummer's Day, campfire dancing, BBQ, Finnish sauna, crafting, wood carving, picking fruits, fishing, yachting, canoeing, cycling	Stockholm, Malmo, Skåne, Helsinki, Seurasaari, Lappeenranta	Sweden Finland Åland Islands
7.	Iceland in-depth 10 days or South Iceland 7 days	Geographical wonders - Arctic / glacier / volcano / activities + City	Glacier Hiking, Eldheimar Museum, Blue Lagoon spa, photographing, whale watching, Myvatn spa, ranch, Skaftfell art centre, crafting-making your own souvenir,	Reykjavik, Golden Circle, Vik, Kirkjubæjarklaustur, Westman Island, Snaefellsnes, Akureyri, Húsavík, Seydisfjörður, Djúpivogur	Iceland plus Sweden, Finland or Denmark



Recommendations in Product Development

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No.	Sample Itineraries Developed	Theme	Activity	Cities/regions	Destinations
8.	Northern Europe art and design	Northern Europe art and design, museums, art studios, local bar	Finland design forum, Metro station, crystal factory, DR Concert Hall, Danish Centre of Architecture, Design House Stockholm, making Dala Horse	Helsinki, Stockholm, Kosta, Porvoo, Dalarna	Denmark Sweden Finland
9.	Encounter interesting souls	Culture and lifestyle - young city hipsters - art, design, architectures, bars	Rooftop walk, cooking class, cycling, taking ferry, fancy hot dog, Carlsberg beer	Copenhagen, Aarhus, Stockholm	Denmark Sweden
10.	Classic four light tour in Northern Europe- the pursuit of happiness	Culture and lifestyle - cuisine, Fjords, (kids, families, young couples)	Students go to class while parents do free activities, Ravnsborgade flea market, Sampo Icebreaker, FAZER chocolate factory	Copenhagen, Stockholm, Helsinki, Rovaniemi, Kemi	Denmark Sweden Finland
11.	Family in Northern Europe	Fairy tales and Santa Claus	Helsinki Cathedral, Santa Claus Village (dinner with Santa Claus), Angry Birds Activity Park, Tivoli Gardens, snow mobile, Husky/reindeer ride, skiing, outdoor skiing class, Northern Lights, Torvehallerne food market, Stroget shopping	Helsinki, Vuokatti, Rovaniemi, Copenhagen	Denmark Finland
12.	Iceland and Greenland photographing trip	Photographing	Route-design considering the light, colour and contrast in photography	Snæfellsnes, Hraunfossar, Vik, Vatnajökull,	Greenland, Iceland plus Sweden, Finland or Denmark



Recommendations in Product Development

No.	Sample Itineraries Developed	Theme	Activity	Cities/regions	Destinations
13.	Atlantic Ocean Road drive	* Self-driving - Atlantic Ocean Road, Fjords, Hiking	Driving through fjords, Glacier Walk, Flam Railway, fjord cruise, Bergen fish market, tasting king crab	Oslo, Bergen, Tromso, Molde	Norway
14.	** Cruising in Northern Europe and Estonia	Cruise - Finland and Sweden, Finland and Estonia	Cruising and Sightseeing, 14 days cruise in Northern Europe, Silja Line Cruise from Stockholm to Åland, Viking Cruise from Helsinki to Tallinn	Stockholm, Oslo, Copenhagen, St. Petersburg, Tallinn, Åland	Sweden Finland Åland Island
15.	Whale-watching and Arctic - Greenland and Denmark	Whale-watching and Arctic	Four hours' whale safari, watching several kinds of whales	Ilulissat, Arveprinsens Ejland, Disko Bay	Denmark Greenland



Recommendations in Product Development

In a wider sense, product development for achieving long term sustainability should also include

- Collaborating with Nordic government departments and ministries to implement recommendations in areas such as: road signs, visas, Chinese restaurants, Chinese speaking staff and other such topics. Improve conditions and safety for Chinese self-driving visitors for better road safety and again facilitate dispersal.
- Investing in expanding carrying capacity – more qualified Chinese speaking staff and tour guides, suitable hotel rooms and (Chinese) restaurants in order to provide quality services and achieve high traveller satisfactions Developing products and services that educate Chinese tour operators and travellers of products outside of major cities



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Q&A

Thank you very much for your
interest!

Looking forward to your comments and questions.





THE NORDICS

