



Visit Finland

China

Regional Pack

(Beijing, Shanghai,
Guangzhou and Hong
Kong)



China Market Context

Visit Finland
information

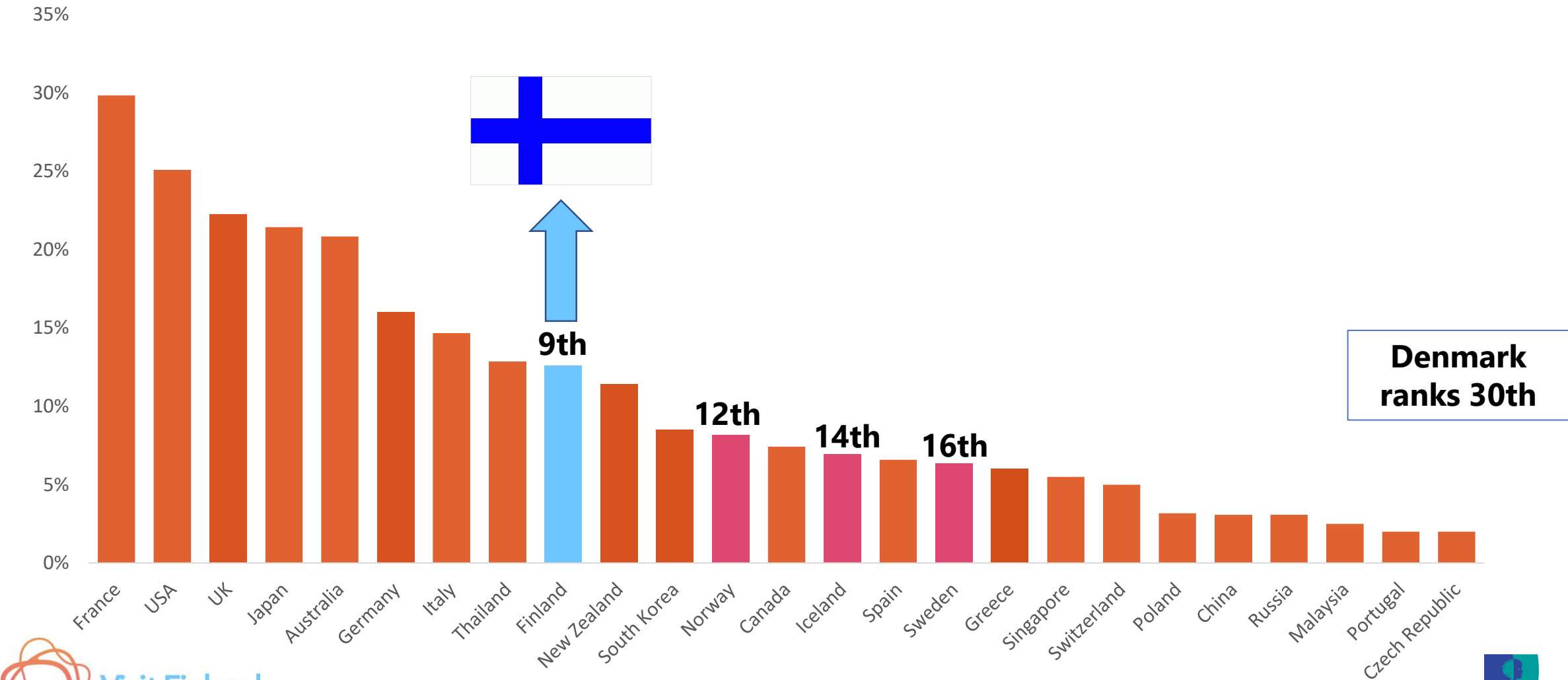
- Globally, China is the **fastest growing traveller market**, this is despite the number of Chinese holding a passport being limited to 9-10% of the population.
- As a **long-haul market**, China has the **highest number of overnight stays in Finland**, ranking fifth amongst all countries.
- Chinese travellers are also the **highest spenders per traveller** of all the markets, with their travel income second only to Russia. As such, **Visit Finland's biggest investments** have been **within the Chinese market**.
- The big Chinese travel channels are in the process of **building strong ecosystems** within Finland through sites such as Tencent, Ctrip etc.
- Finland is viewed as a **new and trending destination**, with a **good reputation in education** and a winter sports partnership at the state level for 2019.
- The USP's that interest Chinese travellers are focused around; **safety, stable, clean air, space and extreme adventures and experiences**.
- Finland's geographical location allows it to be **viewed as a hub**, as both part of the Nordics and close to the Baltics. **New air routes and airline partners** will allow Finland to cement this reputation and expand visitation and tourism revenue.

Where do we rank in visitors minds?



When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland stands out from its Nordic competitors – ranking as #1 in the Nordics

Spontaneous Destination Consideration



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Q2. SPONTANEOUS CONSIDERATION DESTINATION

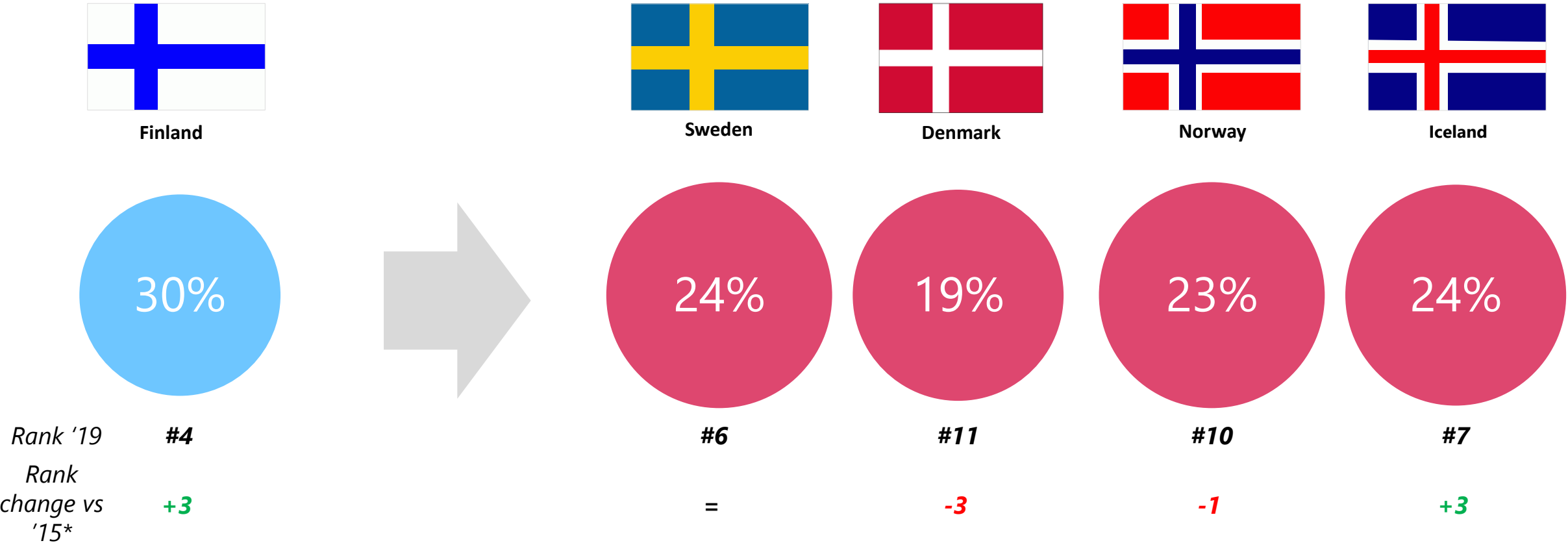
Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries

Base: Total Sample (1,200)



Prompted consideration of Finland as a holiday destination is also higher than our Nordic neighbours with an improvement in rank since 2015 too

Total Consideration



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Q7. PROMPTED CONSIDERATION DESTINATION

Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?

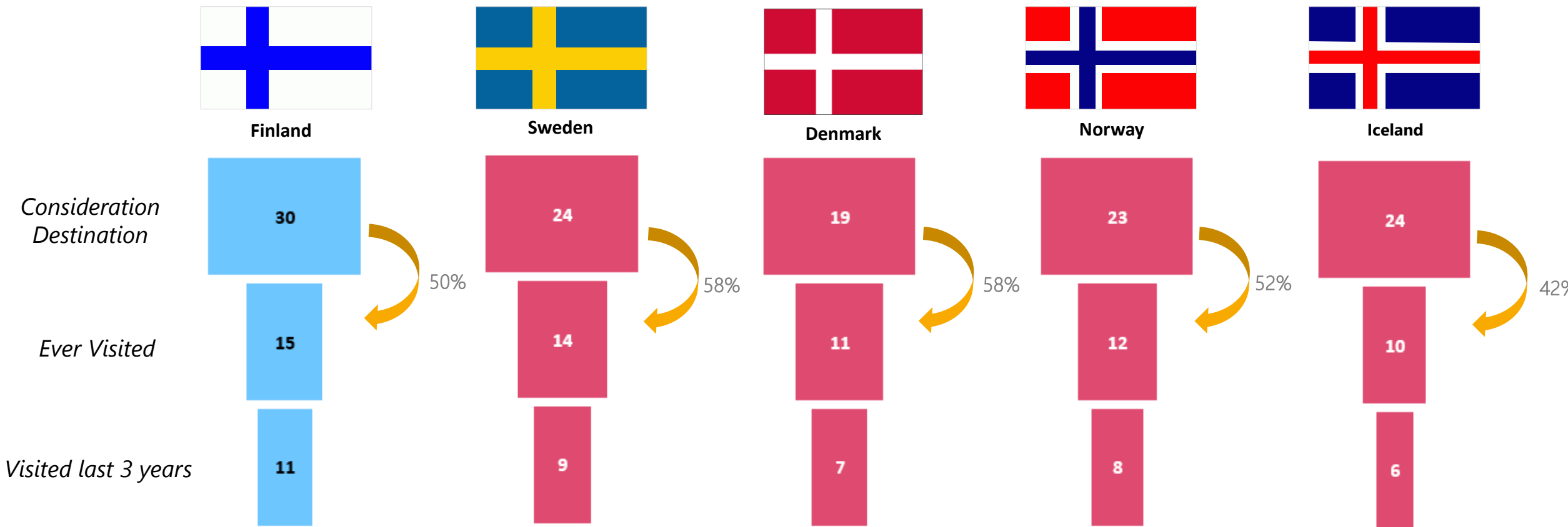
*=different methodology and consideration set used



Base: Total Sample (1,200)

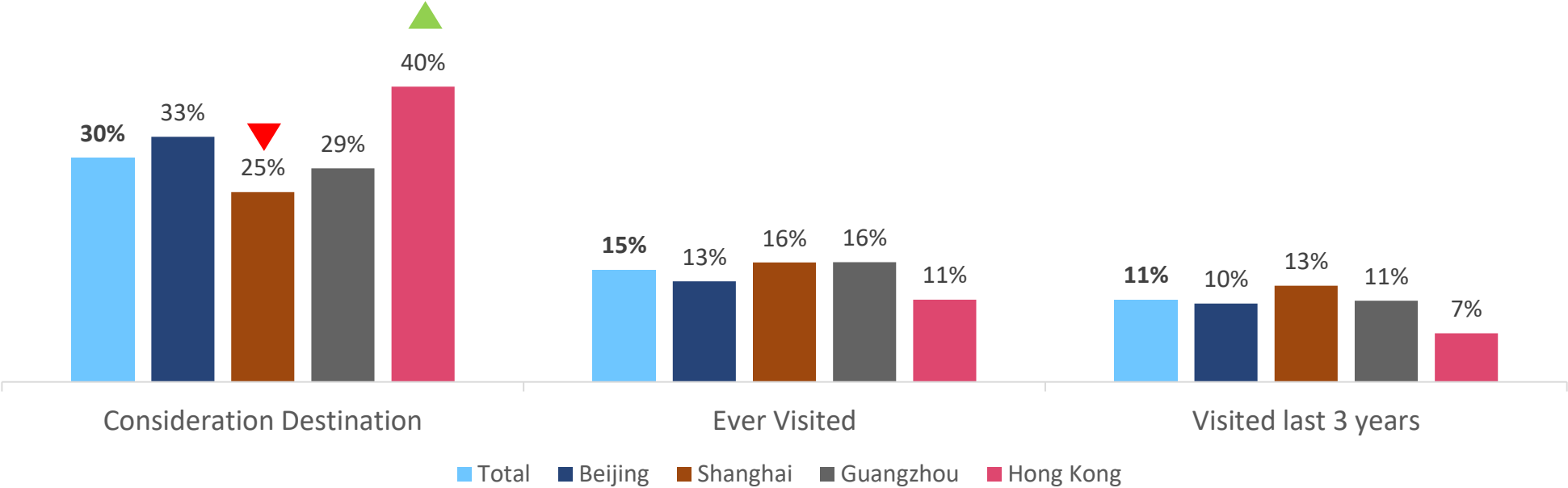
Finland has the highest level of Chinese tourists claiming to have ever visited / visited in the past 3 years

Consideration to P3Y visit funnel



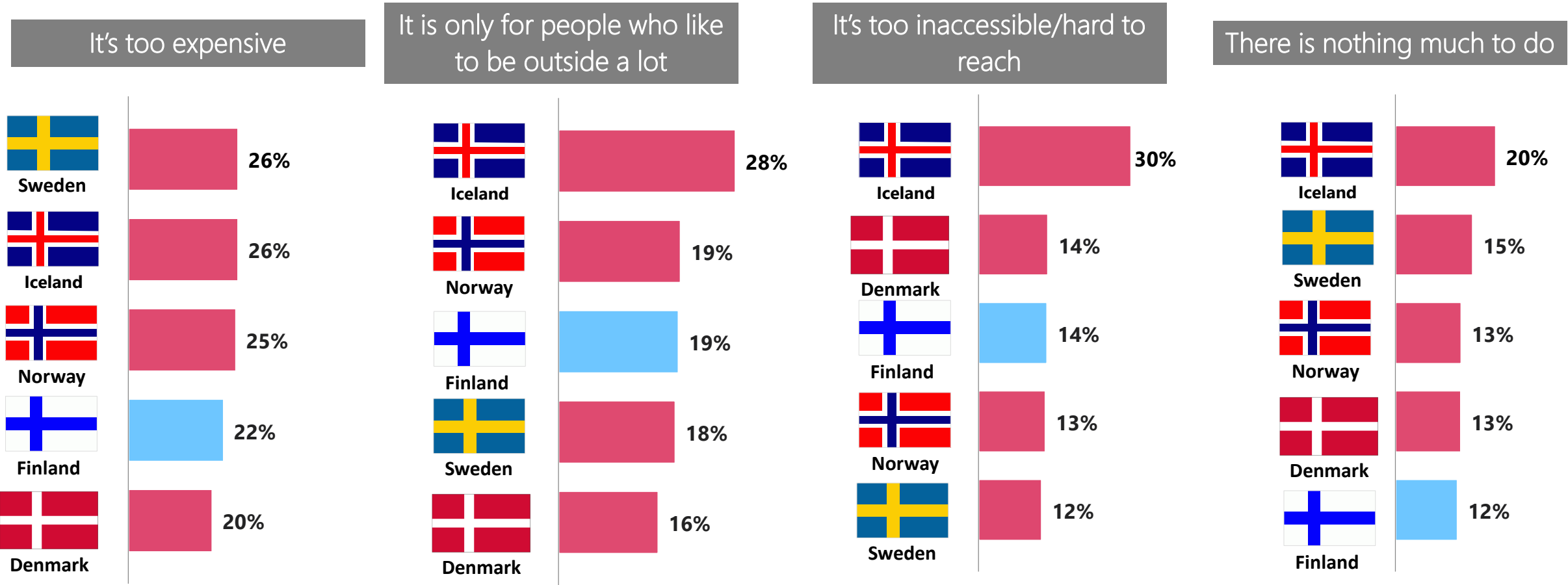
Consideration to visit Finland is stronger in Hong Kong compared to the other regions surveyed but this hasn't yet translated to higher visitation from this region

Regional Differentiation



Barriers to visit Finland and other Nordic countries are fairly similar in China. Iceland however, stand out slightly with more perceived barriers to visit

Barriers to visit



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Q14 BARRIERS

Please now consider the following statements. Do you associate any of these holiday destinations with these statements?



Base: Total Sample (1,200)

**What are we known
for as a travel
destination?**



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My aim is to visit the Santa Claus village and enjoy the seafood there.

*The scenery is very beautiful,
honest, good benefits, and high
happiness*

*Nordic, high welfare, high
consumption, beautiful scenery*

*You can relax there and
go and see the Northern
Lights*

*Santa's Village
Northern Lights*

*Sustainable, in harmony with
the environment*

Finland is known as the country of a thousand lakes, with a Santa Claus town

Finnish people are very enthusiastic, the country has a polar scenery and sometimes you can see the aurora

Santa Claus, a beautiful environment, large and small lakes all over the territory, the air is clean, suitable to visit all year round

Aurora, Santa Claus Village, high consumption, Nordic, good law and order

Finland is a country of thousands of beautiful lakes, especially suited to families and for strolls along the lakes in the summer

Nordic polar scenery, lakes and mountains, highly developed economically and culturally

*Beautiful natural environment, the
Northern Lights, Helsinki*



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Q9 BMN

Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.

Base: Consideration Set: Finland (416)



Spontaneous impression – Competitors



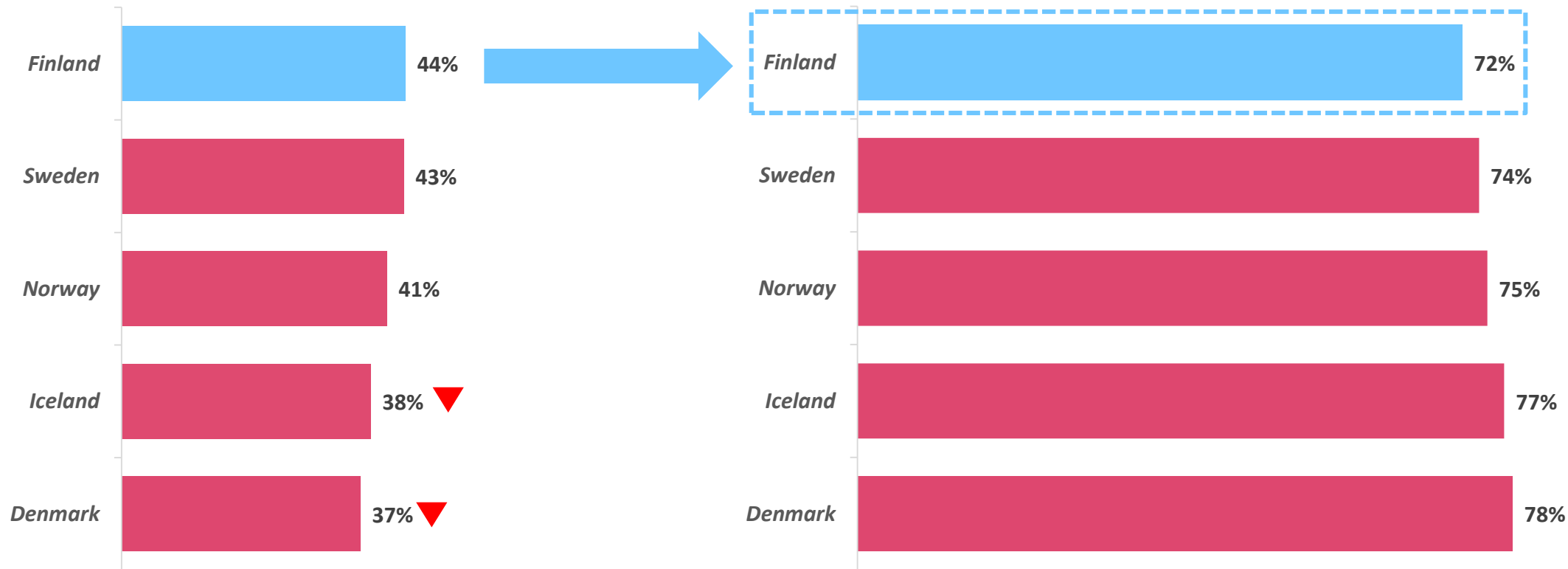
Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.



Knowledge of Finland is high in China, with close to three-quarters of those with strong knowledge of Finland considering visiting the country in the next three years.

Destination Knowledge (T2B)

Claimed visitation to country in the next three years (amongst those with more than a fair amount of knowledge of each country)



Q10 DESTINATION KNOWLEDGE
How much do you feel you know about each of these countries as a holiday destination?

Sig diff at 95%
vs Finland

Base: Total Sample (1,200)



The Nordics are seen as a homogeneous region in China with regards to cultural and hospitality related image associations. Denmark lead the way for high level educational camps, a key area for us

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

Do you associate any of these holiday destinations with the following statements?

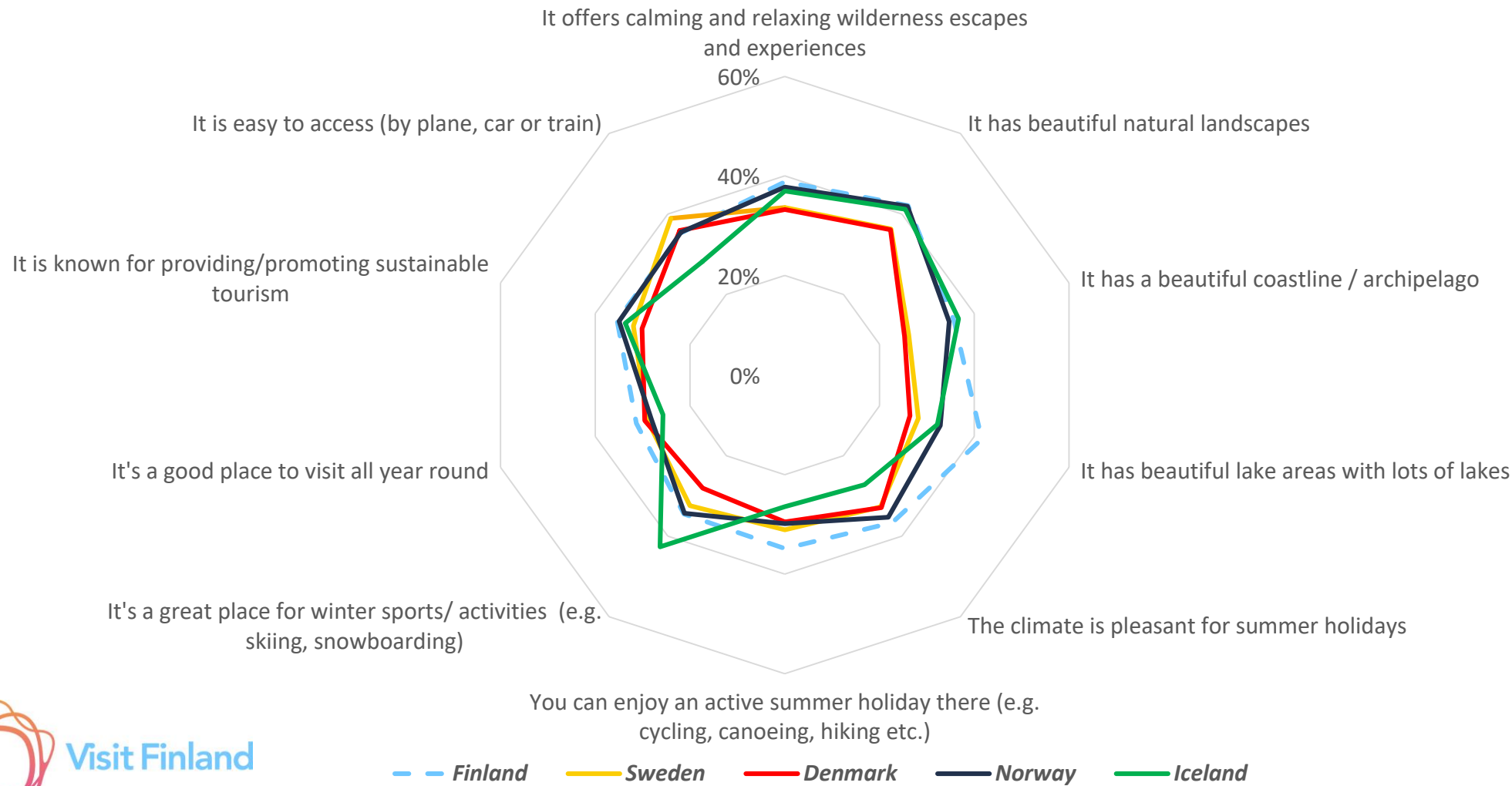
Finland Sweden Denmark Norway Iceland



Base: Total Sample (1,200)

Finland is strongly associated with lakes. We lose out to Iceland for perceptions of being a great place for winter sports

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

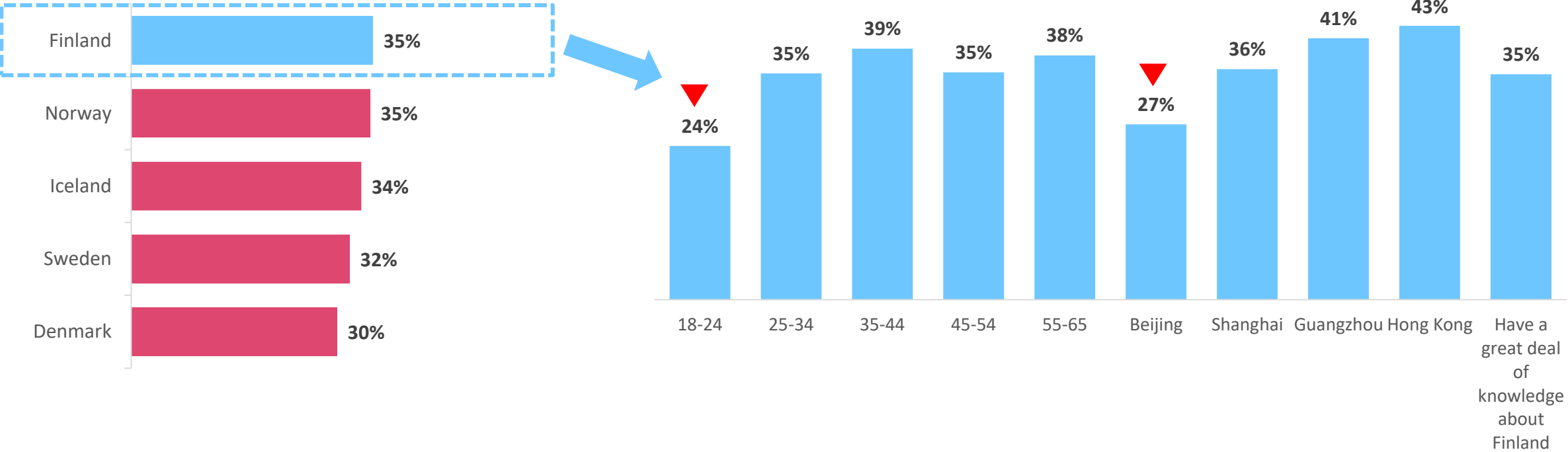
Do you associate any of these holiday destinations with the following statements?

Finland Sweden Denmark Norway Iceland



There is also little differentiation across the Nordic countries on perceptions around sustainable tourism. For Finland perceptions are particularly low amongst the young and those residing in Beijing

Image - It is known for providing/promoting sustainable tourism



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Q13 IMAGE ASSOCIATIONS

Do you associate any of these holiday destinations with the following statements?

Sig diff at 95%
vs Total Sample



Base: Total Sample (1,200)



The Chinese perceptions of what a 'sustainable travel destination' is, focuses around developing systems that protect the environment, cultural heritage and the harm tourism causes to local residents

Sustainable travel destination - OEs

*Destinations with sustainable travel
resources without excessive
consumption or wastage*

Sustainable is to having visitors keep coming back, having some attractions that are distinctive with new tricks

*A place that is good for tourists now
and for years to come*

Places with more environmental protection for conservation purposes, such as the national parks and marine parks, where the visitors are not allowed to do certain things.

*Ecology and tourism combined.
Eco-tourism, does not affect
local residents*

*Greener,
cleaner and
more real.*



Protect the environment and facilities, to the sustainable development of the travel industry

Development of green products, attention to cultural heritage and heritage protection, environmentally friendly, recyclable or recycled.

Low-carbon tourism, balanced tourism development, heritage protection.

Business development must involve sustainable planning. Visitors should abide by the rules and regulations of tourism, without destroying the original ecosystem.

*There's a diversification of projects,
such as natural scenery and cultural
history of art*



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Q23 SUSTAINABILITY

In your opinion, what is meant by a 'sustainable' travel destination?



Ipsos

Base: Total Sample (1,200)

18

Activity Associations

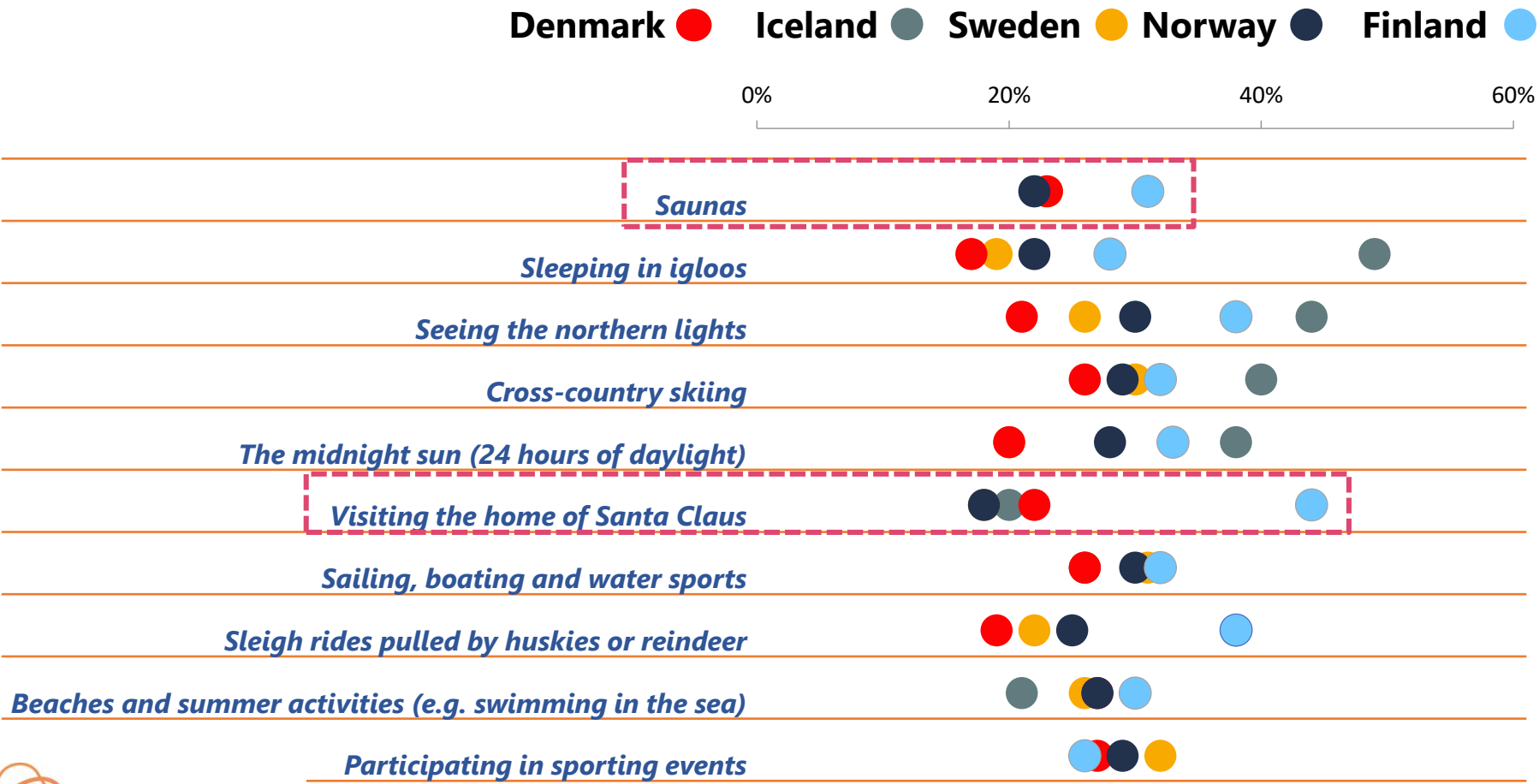


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In terms of activities and experiences associated with Finland, Santa Claus is strongly linked to Finland in the Chinese population’s minds, as are saunas, although to a lesser extent.

Activities Associations



Q15 ACTIVITIES ASSOCIATION

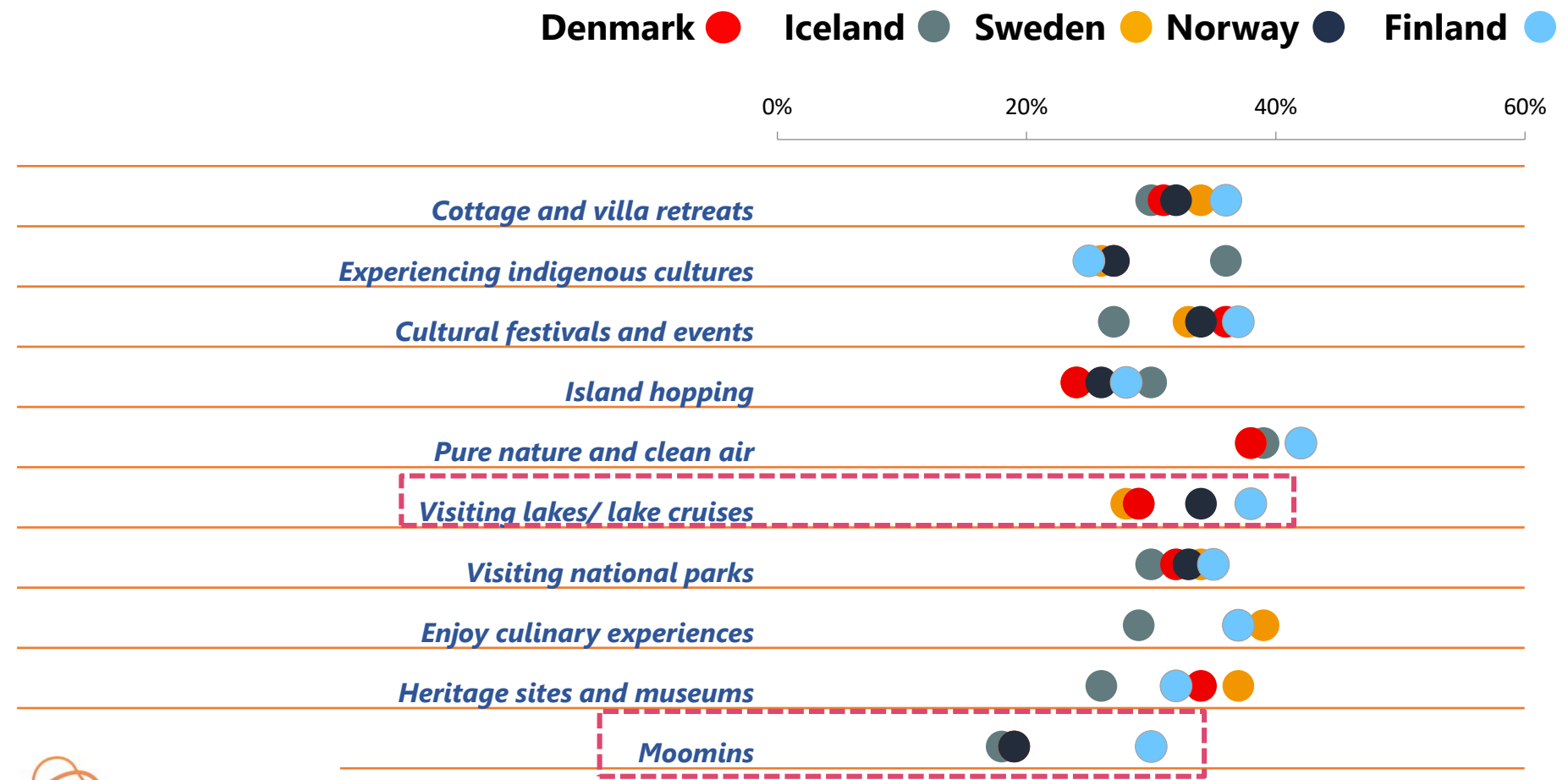
Do you associate any of these holiday destinations with the following activities and experiences?



Base: Total Sample (1,200)

The Chinese also closely associate visiting lakes with Finland. Moomins are also correctly linked to Finland.

Activities Associations



Q15 ACTIVITIES ASSOCIATION

Do you associate any of these holiday destinations with the following activities and experiences?

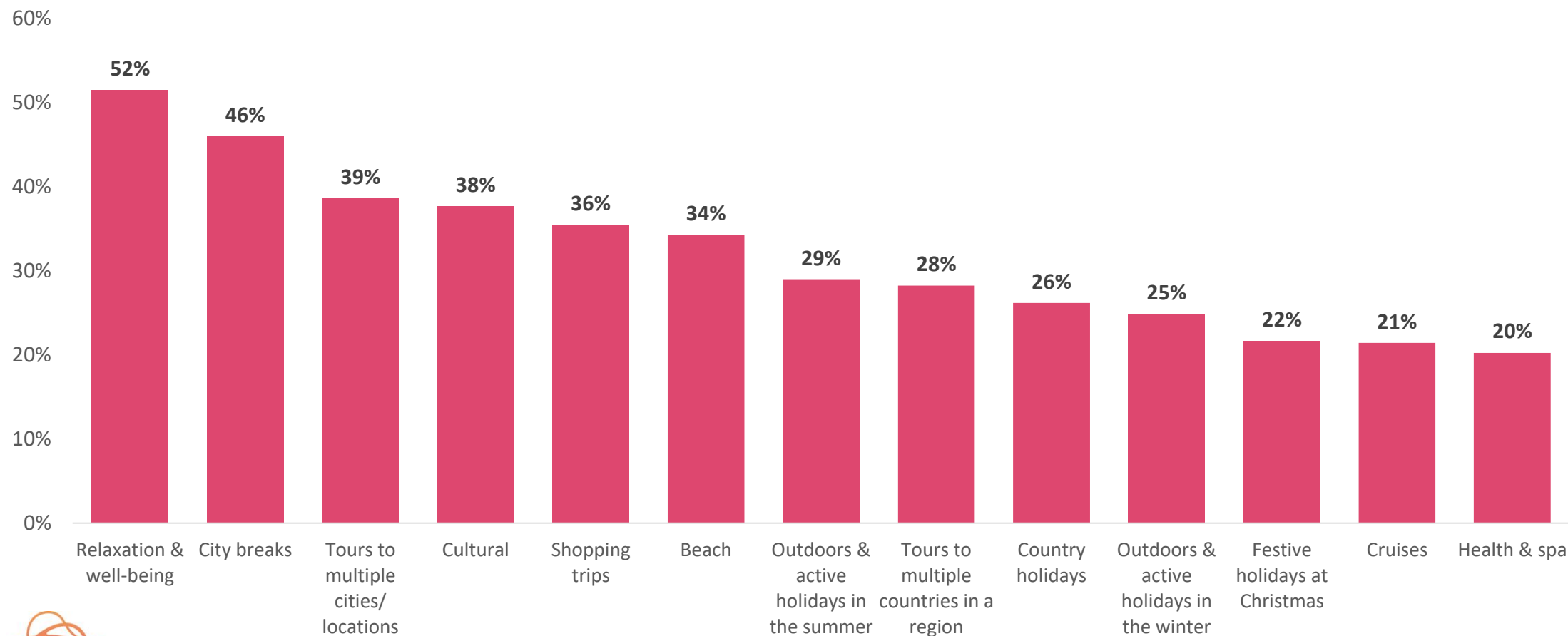


Base: Total Sample (1,200)

How are people visiting us?

The Chinese population prefer relaxation and city break holidays.

Preferred Holiday Type (Total Sample)



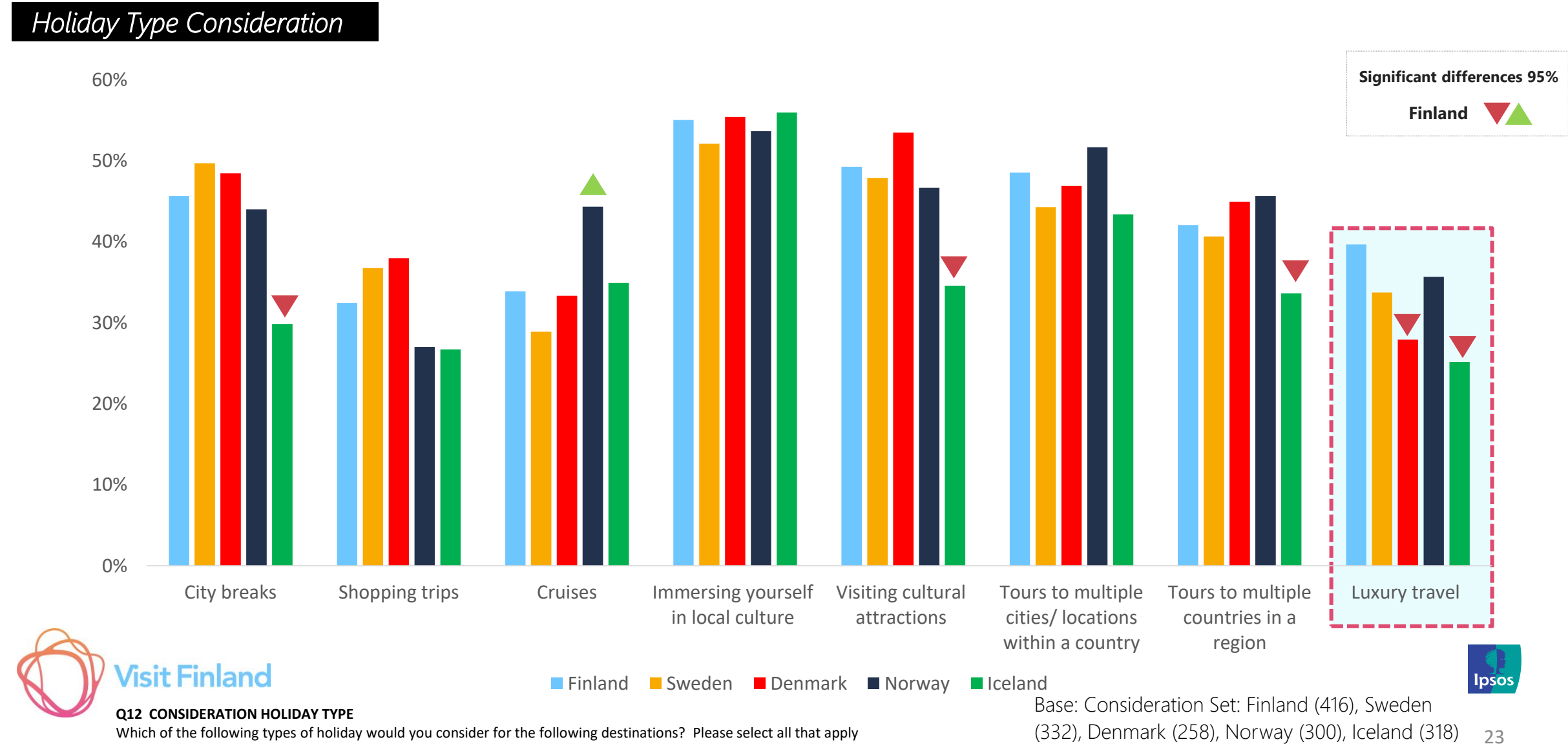
Q22 PREFERRED HOLIDAY TYPE

Still thinking about when you travel abroad for holidays, which type of holiday do you prefer to go on?

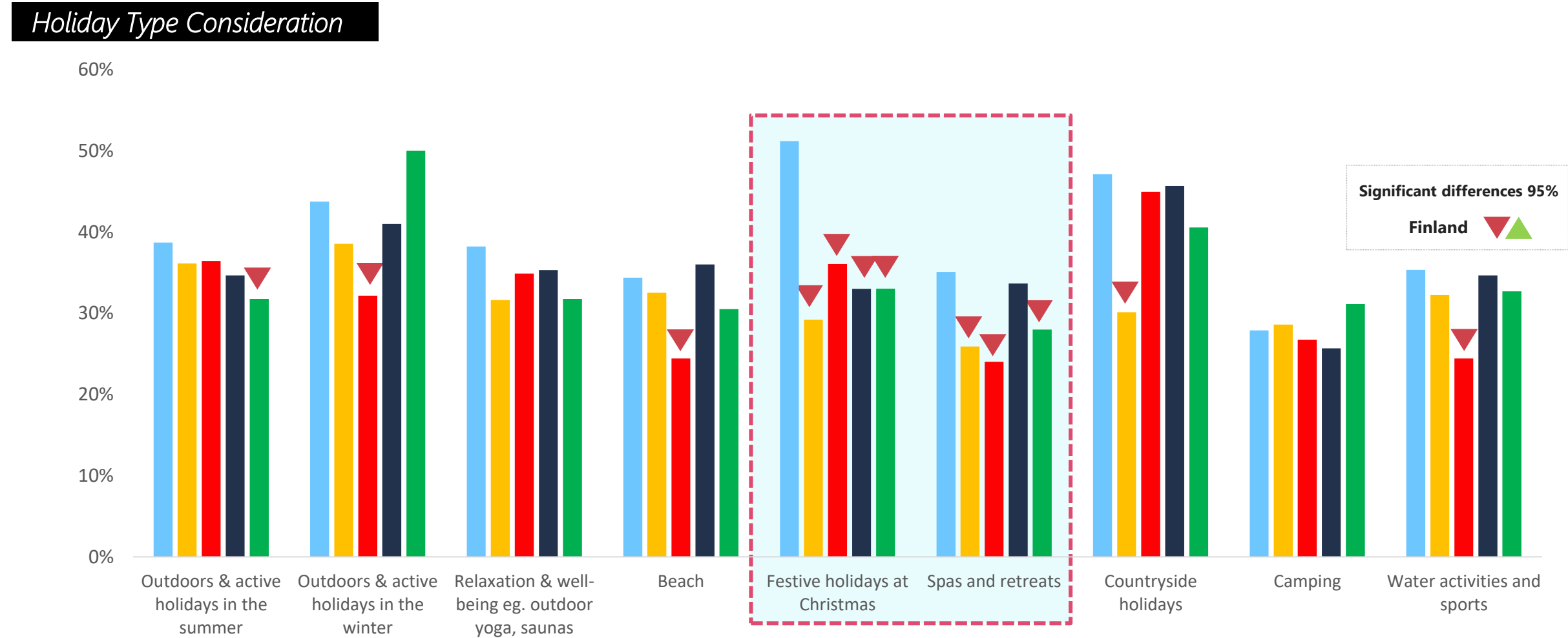


Base: Total Sample (1,200)

In a country that has the highest spend per traveller, Finland holds an advantage as being a country strongly considered with luxury travel.



The Chinese strongly associate Finland with festive holidays at Christmas and spas. As seen with imagery, we lose out to Iceland for outdoors and active holidays in the winter.



Q12 CONSIDERATION HOLIDAY TYPE

Which of the following types of holiday would you consider for the following destinations? Please select all that apply

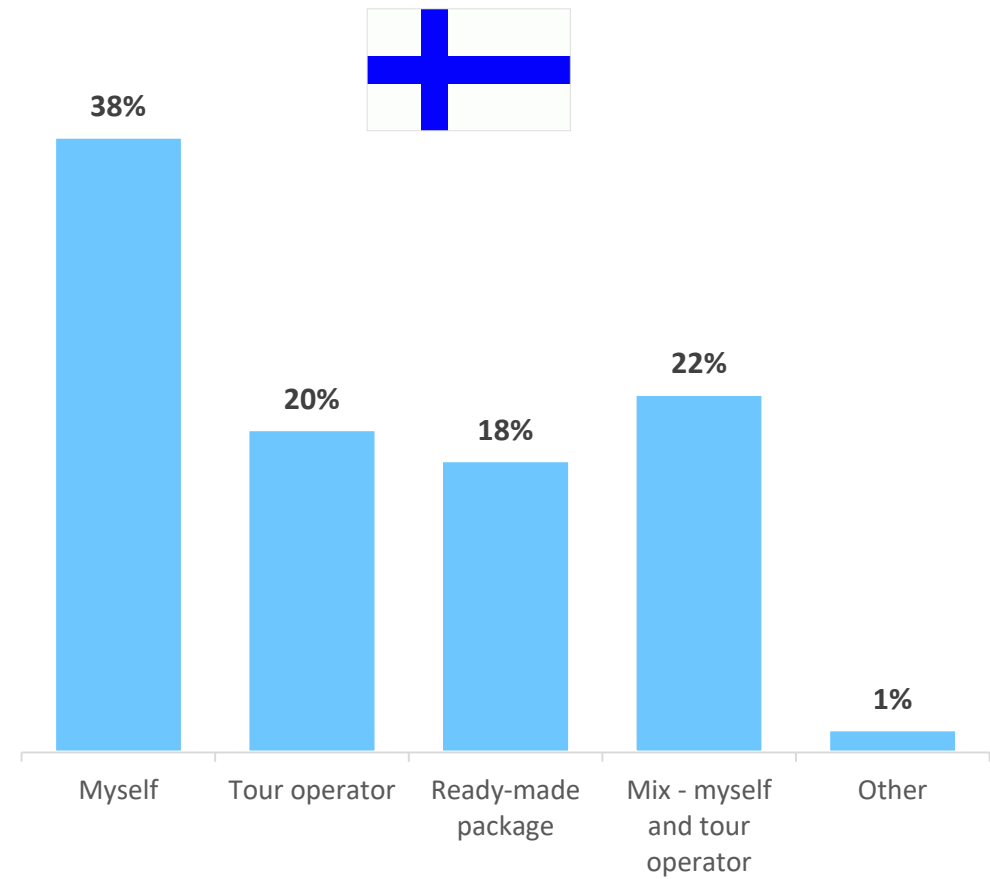
Finland Sweden Denmark Norway Iceland

Base: Consideration Set: Finland (416), Sweden (332), Denmark (258), Norway (300), Iceland (318)

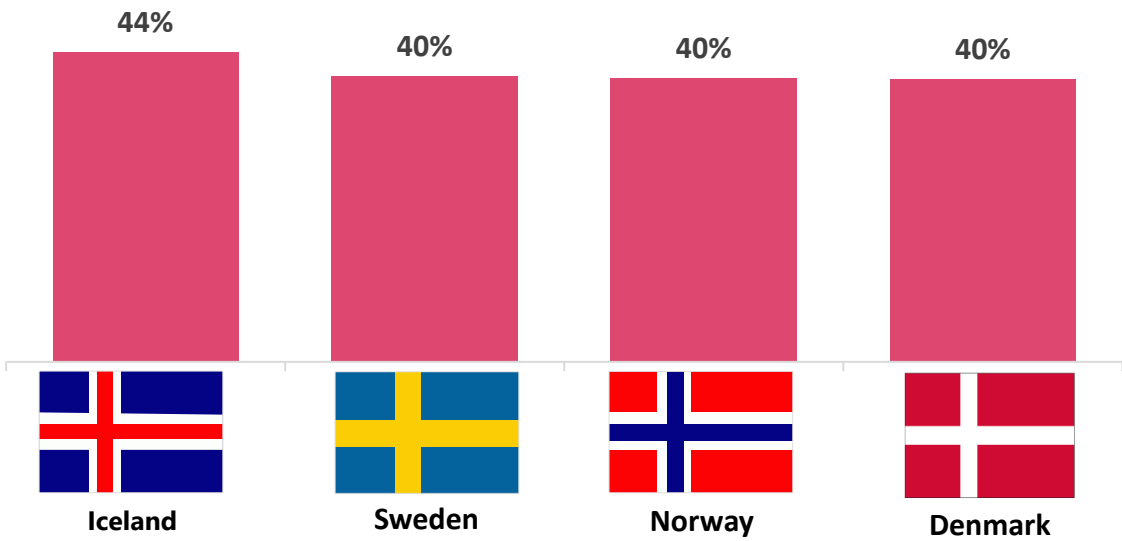


Most Chinese who are considering visiting Finland plan and make the bookings themselves. This is a similar level for travel to the other Nordic nations.

Trip Arranging



Book trip myself



Q11 TRIP ARRANGING

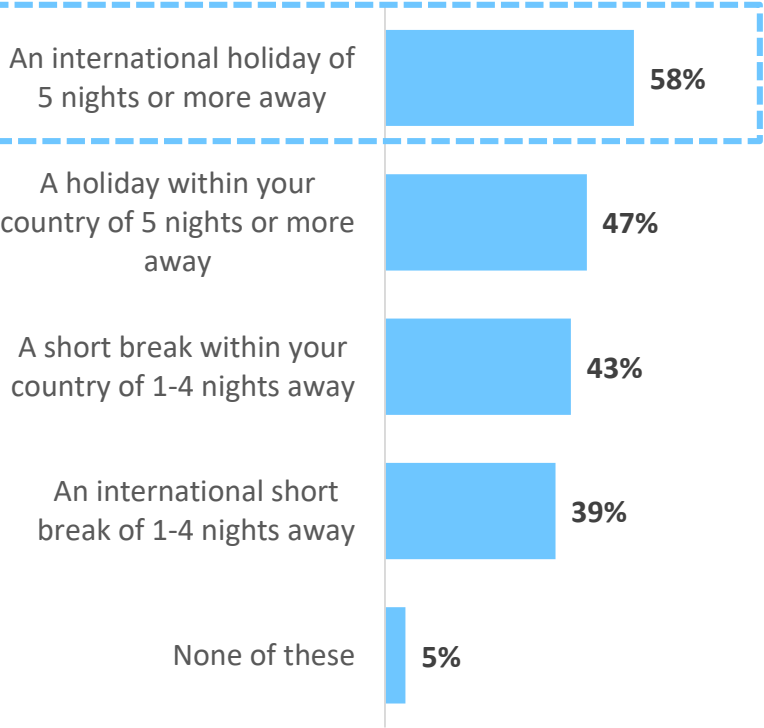
You said that you would consider a holiday or short break to the destinations below, how would you like to arrange your trip there?

Base: Consideration Set: Finland (416), Sweden (332), Denmark (258), Norway (300), Iceland (318)



A majority of the Chinese population have been on a long international trip in the last year. Young people and those from Hong Kong are most likely to take these trips – in line with the international outlook/identity of the HK territory

Past Year Holiday



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Q20 PAST YEAR HOLIDAY

Which of these types of holiday or leisure trip have you taken over the past year?

Sig diff at 95%
vs Total Sample



Base: Total Sample (1,200)



Summary & Recommendations

Summary and Final Thoughts

- Consideration of Finland as a holiday destination in China is strong (ranked #1 in the Nordics) and has improved in rank since 2015. Subsequently visitation is higher for Finland than any other Nordic country
- Knowledge about Finland in China is the highest of the Nordic countries - with close to 3/4 of those with strong knowledge considering visiting the country in the next three years
- Whilst consideration and international travel is highest in Hong Kong we are not yet seeing more visitation from the region - highlighting an opportunity to better appeal to this territory, perhaps through promoting the accessibility of Finland and specifically Helsinki which acts as an international hub for Chinese international flights
- Finland see some stand out with its lakes. However the lack of differentiation offers up an opportunity try to differentiate Finland and gain some USP compared to its Nordic neighbours
- As a market, China is particularly keen on relaxation holidays. Empathising Finnish relaxation and well-being activities such as saunas, or the tranquillity of its regions, could be a good way to better tap into this market, as none of our Nordic competitors currently have an advantage here
- Whilst a key focus for us, we need to be aware that Denmark are ahead of us in image perceptions as a destination for high level education location, and Iceland lead the way for winter sports association. We need to maintain messaging in these areas to help close the gap





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