China Regional Pack
(Beijing, Shanghai, Guangzhou and Hong Kong)
China Market Context

• 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**

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.
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**

- **Finland**: 30% (Rank '19: #4, Rank change vs '15*: +3)
- **Sweden**: 24% (Rank '19: #6)
- **Norway**: 23% (Rank '19: #10)
- **Iceland**: 24% (Rank '19: #7)
- **Denmark**: 19% (Rank '19: #11)

*Note: *different methodology and consideration set used
Finland has the highest level of Chinese tourists claiming to have ever visited / visited in the past 3 years.

**Consideration to P3Y visit funnel**

- **Finland**: 30
- **Sweden**: 24
- **Denmark**: 19
- **Norway**: 23
- **Iceland**: 24

**Base**: Total Sample (1,200)
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**

- **Consideration Destination**
  - Total: 40%
  - Beijing: 30%
  - Shanghai: 25%
  - Guangzhou: 29%
  - Hong Kong: 33%

- **Ever Visited**
  - Total: 15%
  - Beijing: 13%
  - Shanghai: 16%
  - Guangzhou: 16%
  - Hong Kong: 11%

- **Visited last 3 years**
  - Total: 11%
  - Beijing: 10%
  - Shanghai: 13%
  - Guangzhou: 11%
  - Hong Kong: 7%

*Base: Total Sample (1,200)*
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

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Sweden</th>
<th>Finland</th>
<th>Norway</th>
<th>Iceland</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's too expensive</td>
<td>26%</td>
<td>22%</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>It's only for people who like to be outside a lot</td>
<td>18%</td>
<td>19%</td>
<td>19%</td>
<td>28%</td>
</tr>
<tr>
<td>It's too inaccessible/hard to reach</td>
<td>16%</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>There is nothing much to do</td>
<td>20%</td>
<td>12%</td>
<td>13%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,200)
What are we known for as a travel destination?
Spontaneously, the beauty of Finland comes through strongly in China, as does its association as the home of Santa Claus, and as a location where you can view the Northern Lights.

**Spontaneous impression - Finland**

- 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.
- Nordic polar scenery, lakes and mountains, highly developed economically and culturally.
- Sustainable, in harmony with the environment.
- Beautiful natural environment, the Northern Lights, Helsinki.
- 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.

Base: Consideration Set: Finland (416)
Beauty, is strongly associated with the rest of the Nordics as well. With country specific associations (Ikea in Sweden, Fairy Tales in Denmark) also coming through.

Spontaneous impression – Competitors

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

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)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Knowledge of Country</th>
<th>Claimed Visitation in Next Three Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>44%</td>
<td>72%</td>
</tr>
<tr>
<td>Sweden</td>
<td>43%</td>
<td>74%</td>
</tr>
<tr>
<td>Norway</td>
<td>41%</td>
<td>75%</td>
</tr>
<tr>
<td>Iceland</td>
<td>38%</td>
<td>77%</td>
</tr>
<tr>
<td>Denmark</td>
<td>37%</td>
<td>78%</td>
</tr>
</tbody>
</table>

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

- Finland: 35%
- Norway: 35%
- Iceland: 34%
- Sweden: 32%
- Denmark: 30%

**Q13 IMAGE ASSOCIATIONS**
Do you associate any of these holiday destinations with the following statements?

- 18-24: 24%
- 25-34: 35%
- 35-44: 39%
- 45-54: 35%
- 55-65: 38%
- Beijing: 27%
- Shanghai: 36%
- Guangzhou: 41%
- Hong Kong: 43%
- Have a great deal of knowledge about Finland: 35%

**Sig diff at 95% vs Total Sample**
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.
- Low-carbon tourism, balanced tourism development, heritage protection.
- Development of green products, attention to cultural heritage and heritage protection, environmentally friendly, recyclable or recycled.
- 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.
- Protect the environment and facilities, to the sustainable development of the travel industry.

Base: Total Sample (1,200)
Activity
Associations
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.
The Chinese also closely associate visiting lakes with Finland. Moomins are also correctly linked to Finland.
How are people visiting us?
The Chinese population prefer relaxation and city break holidays.

**Preferred Holiday Type (Total Sample)**

- **Relaxation & well-being:** 52%
- **City breaks:** 46%
- **Tours to multiple cities/locations within a country:** 39%
- **Cultural:** 38%
- **Shopping trips:** 36%
- **Beach:** 34%
- **Outdoors & active holidays in the summer:** 29%
- **Tours to multiple countries in a region:** 28%
- **Country holidays:** 26%
- **Outdoors & active holidays in the winter:** 25%
- **Festive holidays at Christmas:** 22%
- **Cruises:** 21%
- **Health & spa:** 20%

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.

**Holiday Type Consideration**

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

Significant differences 95%

- Finland
- Sweden
- Denmark
- Norway
- Iceland

**Q12 CONSIDERATION HOLIDAY TYPE**
Which of the following types of holiday would you consider for the following destinations? Please select all that apply.
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.

**Holiday Type Consideration**

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>Finland</th>
<th>Sweden</th>
<th>Denmark</th>
<th>Norway</th>
<th>Iceland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoors &amp; active holidays in the summer</td>
<td>40%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoors &amp; active holidays in the winter</td>
<td>40%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relaxation &amp; well-being eg. outdoor yoga, saunas</td>
<td>30%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beach</td>
<td>30%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Festive holidays at Christmas</td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spas and retreats</td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Countryside holidays</td>
<td>40%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Camping</td>
<td>30%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water activities and sports</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**

- **Myself**: 38%
- **Tour operator**: 20%
- **Ready-made package**: 18%
- **Mix - myself and tour operator**: 22%
- **Other**: 1%

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**Book trip myself**

- **Iceland**: 44%
- **Sweden**: 40%
- **Norway**: 40%
- **Denmark**: 40%

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**

- An international holiday of 5 nights or more away: 58%
- A holiday within your country of 5 nights or more away: 47%
- A short break within your country of 1-4 nights away: 43%
- An international short break of 1-4 nights away: 39%
- None of these: 5%

Base: Total Sample (1,200)
Summary & Recommendations
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.