

CATERING TO THE DRAGON

Is the Danish tourism sector "China ready"?



*By Matias Thuen Jørgensen
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Matias Thuen Jørgensen

Aalborg University
Tourism
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Supervisor:
Anette Therkelsen
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ABSTRACT

In line with the countries economic development Chinese outbound tourism has grown tremendously in recent years, making China the biggest tourism generating country in Asia and one of the biggest in the world, while still growing. This growth has made China an interesting market for tourism industries around the world and Denmark is not an exception. Chinese incoming tourism to Denmark has thus, although coming from a relatively small place, risen with more than 30 percent in 2011, while the numbers for many traditional markets are falling.

Yet, in academic research and mainstream journalism it is often argued that there are unique wants and needs that a destination has to cater to in order to be “China ready” and that conventional marketing knowledge, acquired from research and experiences with Western consumers, does not apply to Chinese tourists. This raises a number of questions in relation to the “China readiness” of the Danish tourism sector and the following three act as the basis for this thesis:

What is needed for the Danish tourism sector to be “China ready” and does the Danish tourism sector currently fulfil these demands?

- *What characterises Chinese tourists, what motivates their travel decisions and how can the Danish tourism sector attract them?*
- *What is the Danish tourism sector’s understanding of incoming Chinese tourism and what visions and strategies does this understanding generate?*

16 qualitative interviews, four with Chinese outbound tourism experts and 12 with representatives of the Danish tourism sector as well as an extensive review of more than 30 academic articles on Chinese outbound tourism forms the empirical base of this thesis. This data was investigated using a theoretical framework that consists of push and pull theory, SWOT theory and theory on strategies and visions.

This research can be divided into four parts that each act as an important part of the thesis.

First, the literature review, which apart from acting as a data source also provides results on its own, as it points to weaknesses in the existing lite-

ature, gives an overview of the main motivations of Chinese tourists and a chance to present a modified version of Pearce's travel career model.

Second, a push and pull analysis that combines the results of the literature review with perspectives from four experts on Chinese tourism to answer the question of what it means to be "China ready". This analysis adds new motivations to the model presented in the review, but the main conclusion from this analysis is that Chinese tourists can be divided into two major segments *Group Package Tourists* and *Independent and/or In-depth Tourists*.

Third, a SWOT analysis of the Danish tourism sector's understanding of incoming Chinese tourism, seen in relation to the results of the previous analysis and the literature review. The most important conclusion from this analysis and discussion is that there is a contradiction between the Danish tourism sector's interest in incoming Chinese tourism - because of its potential, and their lack of priority given to Chinese tourism - because it is still a small tourist segment in Denmark.

This conclusion was explored further in the fourth and last part of the thesis, which is a discussion of the strategies and visions of the Danish tourism sector in relation to incoming Chinese tourism. Here the pros and cons in attracting *Group Package Tourists* vs. *Independent and/or In-depth Tourists* is discussed and it is suggested that a stronger focus on the latter might bring better results than the current exclusive focus on *Group Package Tourists*. This discussion also indicates that although there seem to be three different strategic approaches - Passive, Pending and Active - to incoming Chinese tourism among the Danish tourism sector representatives, the main strategy of most of the sector is to trust the DMOs to attract the Chinese tourists. This creates a situation where the DMOs possess a triple role which in turn results in a problematic situation where many of the Danish tourism representatives are waiting for Chinese *Independent and/or In-depth Tourists* to come, while their main marketing strategy is to pay the DMOs to attract *Group Package Tourists*.

Finally these four segments are concluded with the arguments that for a tourism sector to be "China ready" it needs to be "China invested" and for the Danish tourism sector to be so, it needs to have a stronger focus on the Chinese market, including stronger determination in terms of which segments it wants to attract and better cooperation, in terms of reaching this or these segments.

PREFACE

I would like to take this opportunity to thank several people whose contribution made this thesis possible. Special thanks goes to my supervisor Anette Therkelsen for her guidance, constructive criticism and our inspiring discussions during the preparation and writing of this thesis. Great thanks also go to the 16 organisation and company representatives, who took precious time out of their calendar to talk to me and also assisted me greatly in finding additional interviewees and other relevant people.

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INTRODUCTION



INTRODUCING THE THESIS

Having one fifth of the world's population and the greatest number of consumers in the world combined with a tremendous increase in disposable income and relaxation of former restrictions on outbound travel (Mok & DeFranco 1999:99) has propelled China into its position as the biggest tourism generating country in Asia (Xie & Miao 2009:232) and one of the biggest in the world (Cai et al. 1999:132, China National Tourism Administration, 2008).

Tourism sectors around the world are beginning to realize the potential in this expansion and many journalists as well as tourism academics talk about Chinese incoming tourism as a potential goldmine - since the Chinese tourists are plentiful and among the highest spenders when travelling (Xie & Miao 2009:239; Zhang & Liu, 2008:432). Especially leisure tourism is rising and the number of outbound non-business travelers from China thus surpassed the number of business travelers for the first time in 2000 (Guo et al. 2007:317). (See Appendix 2 for additional background information on the history and current state of Chinese tourism.

In the case of Denmark, although Chinese tourism is still a relatively small tourism segment with approximately 75.000 night per year, the expansion is also showing with 30,1% growth in incoming Chinese tourism from 2011 to 2012 (Visit Denmark 2012). And with SAS' opening of a new direct route between Copenhagen and Shanghai, but maybe more importantly Air China's new direct route between Copenhagen and Beijing – since they mainly carry Chinese passengers, there are no signs that this growth will lessen in 2012 (Berlinske Business 15/11-2011).

In the wake of this growth, academics and mainstream journalists are beginning to ask questions regarding which destinations are “China ready”. It is thus argued that there are unique wants and needs that a destination has to cater to in order to appeal to the Chinese tourists (Global Travel Industry News 20/10-2011) and that conventional marketing knowledge, acquired from research and experiences with Western consumers, therefore does not apply to Chinese tourists (Lai et al. 2010:742). Particular management skills, cross-cultural understanding and Chinese language abilities are examples of things often mentioned as important if a destination or an organisation wants to be “China ready” (Guo et al. 2007:330).

Yet, despite the potential and importance of the subject there is a lack of academic research that deals with the Chinese inbound tourism market for Western destinations (Pan & Laws 2003:37; Seongseop et al. 2005:213) and no research that investigates the nature “China readiness”. This raises a number of questions, on the one hand in relation to what being “China ready” entails and on the other, in terms of whether given destinations can be regarded as such. In this thesis I seek answers to these questions in relation to Denmark. More specifically I wish to investigate whether the Danish tourism sector is “China ready” and in order to do so I also need to find out what it takes for the Danish tourism sector to be so.

A theoretical framework on push and pull factors will be utilized in the making of a thorough review of literature on Chinese outbound tourism as well as a following analysis and discussion, where this review is analyzed in relation to the perspectives found in four interviews with experts on Chinese tourism. This analysis should provide perspectives on the motivations that affect Chinese tourists when they travel and what merits of Denmark as a destination that might be interesting to Chinese tourists. From this analysis and discussion I hope to gain an understanding of what it means to be “China ready”. This knowledge will then be applied to an analysis of the Danish tourism sectors understanding of incoming Chinese tourism, where SWOT theory will be utilized in order investigate the strengths, weaknesses, opportunities and threats of incoming Chinese tourism to Denmark. Finally I will include perspectives gained from the literature, the experts and the Danish tourism sector in a discussion of the Danish tourism sectors visions and strategies toward incoming Chinese tourism and conclude on what it means to be “China ready” in a Danish context and whether the Danish tourism sector can be regarded as such.

There are three major limitations to this thesis that it is important to be aware of from the beginning. First it is important to be aware that this thesis investigates leisure tourism and hence does not deal with business tourism. Second, although Denmark is often marketed in relation to the other Scandinavian countries, this thesis focuses on Denmark specifically. The main reason for this is that the nature of this cooperation, as I will later explain further, is not very stable – Sweden has for example recently left the cooperation between the national tourism organizations and Finland has never been a part of it – and that this relation and cooperation has enough issues and subject matter to carry a thesis on its own. Finally it is important to mention that the Danish tourism sector in this thesis

is represented by 12 representative organizations, primarily located in the Copenhagen area. This means that conclusions made about the Danish tourism sector in this thesis are made on the basis of these representatives and are thus indications about the sector in general, rather than results based on the whole sector, and are probably more applicable to Copenhagen than other Danish cities or tourism areas. For more information about the choice of respondents and other limitations in this thesis, see the methodology section pp. 23.

With these things considered the aim of this thesis is to answer the following research questions:

What is needed for the Danish tourism sector to be “China ready” and does the Danish tourism sector currently fulfil these demands?

- *What characterises Chinese tourists, what motivates their travel decisions and how can the Danish tourism sector attract them?*
- *What is the Danish tourism sector’s understanding of incoming Chinese tourism and what visions and strategies does this understanding generate?*

METHODOLOGY

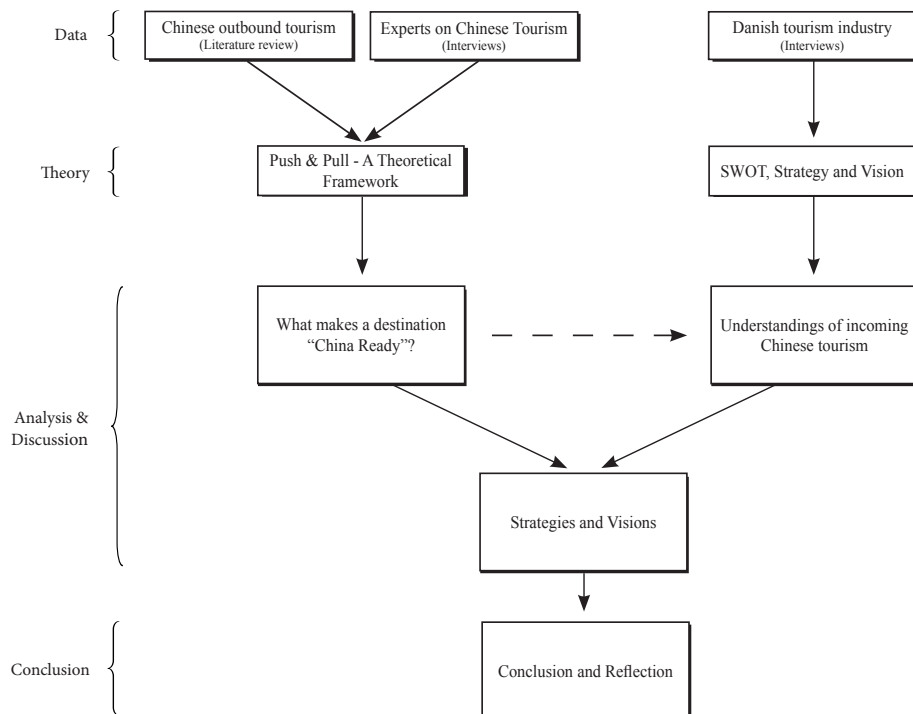


METHODOLOGICAL APPROACH TO THE THESIS

The methodological approach to this thesis can be described as a qualitative explorative hermeneutical approach based on social constructivist ontology. In the following I will explain this approach by elaborating on the philosophic, scientific as well practical aspects that make up the methodology for this thesis. Before that, however, an overview of the research design will be presented in order to ease the reading and understanding of the Methodology chapter and the thesis in general.

Research Design

This conceptual model illustrates the research process - from raw data to conclusion, I will explain the model in the following.



It is important to be aware that conceptual models such as the above often have weaknesses, which is also the case for this model. A main weakness of this model is that it does not illustrate the continuous hermeneutic self-reflectiveness that has affected the research process (see page 27), but instead shows the process as strictly chronological. The model does however provide an overview of the different data sources, theories etc. and should therefore ease the understanding and reading of the thesis, despite its weaknesses.

The model has two different starting points as this thesis works with both the supply and the demand side. On the supply side qualitative interviews with *Experts on Chinese Tourism* and a review of academic literature on *Chinese outbound tourism* act as the main data sources (See the tables on pp. 31 and 33 for more information on the interviewees). These data are analysed using *push and pull theory*, in order to reach an understanding of *What makes a destination "China ready"*. Some results of that analysis will be included in the discussion of the demand side, where qualitative interviews with the *Danish tourism sector* act as the main data source. In this analysis a *SWOT* framework will be utilised to investigate the Danish tourism sector's *Understanding of incoming Chinese tourism*. Findings from both of these analyses will finally be included in the discussion of the *Strategies and visions* of the Danish tourism sector in relation to incoming Chinese tourism, before the thesis is ended by a *conclusion and reflection* section.

Philosophy of science

Ontological considerations

As mentioned in the beginning of this chapter, this thesis is based on social constructivist ontology. Ontology generally concerns the fundamental ways in which something exist, or the nature of reality (Guba 1990:18). This concern can be divided into two major research directions; positivists, who believe a reality external to social actors exists (Ibid:19) and constructivists who believe that reality is social constructions build from the perceptions and actions of social actors (Ibid:27). This thesis is based on the social constructivist view and is therefore based on the contention that knowledge is not something we find or discover, but rather something we construct or make (Schwandt 2000:73). An example of a social constructivist is Potter who argues that *"... the world (...) is consti-*

tuted in one way or another as people talk it, write it and argue it" (Potter 1996:98). He also argues that understanding social practices and analyzing the rhetorical strategies in play in particular kinds of discourse is the way to the understanding of how knowledge is created (Schwandt 2000:73). As I will explain further later in this chapter, this thesis utilizes qualitative interviews as the main tool to find meaning in the social constructions of the company representatives. Yet, with these interviews I do not focus on the rhetoric aspects in order to understand the created knowledge. Instead the focus of these interviews is on the meanings and human interaction. This practise and understanding fits better with the perspective of Gergen who is another social constructivist, he argues *"It is human interchange that gives language its capacity to mean, and it must stand as the critical locus of concern."* (Gergen 1994:263).

According to Bryman the social constructionist approach greatly influences the researcher because no definite version of the social reality can be provided and more so because the research itself is a product of his/her own social constructions of the research area (Bryman 2008:19).

In my case this means that even though I interview people as representatives of companies and organisations, it is the social construction of the interviewees that I analyse. Hence I must accept the statements of the interviewees as the statements of the organisation, even though these might be affected by the social construction, life world and pre-knowledge (I will explain the latter two concepts further on pp. 26-27) of the individuals. This raises questions in relation to validity as the answers I get from the interviews might for example be affected by the relation the interviewee has to the organisation that he or she represents.

Following Bryman's claim I must also consider that I, myself, am a part of the social construction. This means that my research questions, methodology, analysis method, pre-knowledge etc., which are affected by my own social constructions, also affect the conclusions that I produce for this thesis. An example of this is that the interviewees are forced to answer questions from my interview guide, whereby their perceptions are forcedly mirrored in my social construction (Hagen2005:408).

My social constructivist approach thus points to a number of issues in relation to my data collection and analysis capabilities that I must be aware of when analysing and drawing conclusions based on this data. I will ela-

borate further on methodological thoughts and choices in relation to the choice of primary data for this thesis on pp. 28, but before that I must consider my epistemological approach to the thesis.

Epistemological considerations

Epistemology concerns what can be considered acceptable knowledge and the relation between the researcher and this knowledge (Guba 1990:18). It also concerns whether the social world can or should be understood through the same methods and principles as the natural sciences (Bryman 2008:13). One of the central conflicts in this relation is the question of objectivity. Here the positivistic paradigm is based on complete objectivity, while an interpretive paradigm perceive objectivity as unattainable and therefore demands that the researcher recognises this and thus strives to be as neutral as possible, knowing that one can never be truly objective (Guba 1990:21). As my epistemological approach is interpretive I must hence accept that objectivity is not reachable, and be aware of the practical, academic and formal confines surrounding the creation of the thesis.

Hermeneutics

As mentioned in the beginning of this chapter, my epistemological approach to this thesis is hermeneutic. The main reason for this is that hermeneutics are suitable for qualitative research, because the researcher is perceived as a part of the research process (Marschan-Piekkari & Welch 2004:325). According to Føllesdal et al. the hermeneutic approach touches upon the parts of the philosophy of science that tries to reach a valid understanding of the meaning of a text (Føllesdal et al., 2005:88). In my search for the valid understanding of my data, my work will take me through a spiralling process of impressions, shallow work, in-depth work, realization, new impressions and so on. This process work as an interplay between the different parts and the whole - where the whole cannot be understood without looking at the individual parts and vice versa (Fredslund, 2004:93); and an interplay between what is interpreted and the context that it is interpreted in (Gilje & Grimen 2002:178). This interplay continuously increases the understanding and is referred to as the hermeneutic circle (Collin et al. 2007:145). An example of how this interplay has affected my work is that I – after the initial analysis - have added theory on 'Familiarity and Strangeness' (pp. 68), because I saw that Pearce's theory (Pearce 2005) – an individual part – was not sufficient to answer the questions in relation to Chinese outbound tourism – the whole - that

I wanted to answer. Another example of the spiralling increase of understanding is that I have used the literature on Chinese outbound tourism in combination with Mayo & Jarvis travel decision making model (Mayo & Jarvis 1981:20) to reach an understanding of the important subjects of the literature. Then, based on this understanding, I have chosen the theories that I have later used to get a deeper understanding of the literature, thus performing a spiralling movement from literature to theory to literature.

The process of the hermeneutic circle is also heavily affected by pre-knowledge, which is further developed during this spiralling process (Gadamer 1976:56). Already from the beginning of the study the perspectives, actions and choices of the researcher will be selective. The choices that I make, for example when choosing who to interview, are thus affected by my pre-knowledge and values, and in turn, the results of the thesis are also affected by these choices. In Weber's words the study is value affected from the beginning (Gilje & Grimen 2002:258). Examples of pre-knowledge variables that may influence the researchers understanding and interpretation are past experiences, professional background, culture and expectations (Marschan-Piekkari & Welch 2004:325). I must thus be aware that my pre-knowledge affect my work with this thesis. My personal impressions of China, the companies that I interview or on the competences of the experts that I use, may for example affect me in the creation of the interview guide, in the interview situation and in the analysis of the interviews. A concrete example of pre-knowledge that may have affected me is that I, prior to the writing of this thesis, have spent six months in China for my internship. This stay is a big part of the reason for the choice of the subject for the thesis and has consequently, probably affected my pre-knowledge in other ways as well.

The interplay between theory and praxis as well as the effect of pre-knowledge also point to the hermeneutic stance that it is impossible for a researcher to have a clean inductive or deductive approach (Veal 2006:36). This thesis thus both approaches its subject from an inductive angle (Ibid 2006:34) as it takes an explorative empirical approach via qualitative interviews, which have been influential on the choice of theory. As well as a deductive angle (Ibid) since a review of existing literature has affected the choice of respondents for the interviews, as well as the choice of theory.

Data collection method

Two different types of data have formed the basis of the research conducted in this thesis. These are qualitative empirical data in the form of qualitative interviews and secondary data in the form of a literature review of research on Chinese outbound tourism. I have chosen this two sided approach in order to reach a level of triangulation - *"Looking at the same phenomenon, or research question, from more than one source of data."* (Decrop 1999:158) as triangulation *"... opens the way for richer and potentially more valid interpretations"* (Ibid:159). Thereby heightening the validity of the results produced in the thesis.

Secondary data

As mentioned the secondary data in this thesis is a literature review on Chinese outbound tourism. The purpose of this review is to find out what the existing research, from a quantitative as well as a qualitative stance, says about the characteristics, motivations and general state of Chinese outbound tourists, but also from a more explorative angle, to find out what issues research on Chinese outbound tourism deal with, in order to use this as fuel for further discussion.

Writing a literature review

In the creation of the literature review, methodological inspiration was found in the Webster & Watson's article on how to write a literature review (Webster & Watson 2002). Thus I have used a structured approach in my literature search, where I have systematically gone through articles, tried to focus on the leading journals and reviewed citations and bibliographies to find related articles until new concepts no longer came forward (Webster & Watson 2002:15). Around 50 articles, papers and surveys have thus been reviewed and 32 of these were included in the final iteration of the review, which can be found on page 49.

Empirical data

One of the most important choices in relation to the collection of the empirical data for this thesis is the choice of a qualitative approach. The main reason for this choice was that no previous research has been done on the "China readiness" of the Danish tourism sector, which means that a quantitative approach would have been very hard, if not impossible to do, as there would be nothing to base it on. Thus the qualitative approach which focuses on in-depth knowledge about the understanding of each

interviewee was favoured over the generalisability that a quantitative approach offers (Echtner & Ritchie 1991:44). Because of this choice, further research – maybe based on the qualitative results of this thesis - is needed in order to make general conclusions about the Danish tourism sector's "China readiness".

Interview type and situation

The empirical data collected for this thesis consist of 16 explorative, qualitative, semi-structured, expert interviews (Kvale 2007:131). The reason for the this choice of interview type was that I had certain topics that I actively sought answers for, but at the same time I had an interest in following the conversation in order to get inputs on subjects that I did not foresee in the making of the interview guides (Appendix 4) (Thagaard 2004:87; Russel 2006:209).

Two different interview guides was made for this thesis, one for the 'Experts on Chinese Tourism' and one for the representatives of the Danish tourism sector. Both of them were made on the basis of a series of research questions (Appendix 3), as suggested by Kvale (Kvale 2007:133-149). These questions were developed from thoughts, ideas and topics that the theoretical framework, the overarching research questions and the literature review pointed to.

The interviews were between half an hour and one hour long and ideally and primarily conducted face to face in the offices of each organisation, in order to create the most comfortable situation for the interviewee, thus minimising the anxiousness that might be associated with an interview situation. However, due to geographical issues and in a few cases busy schedules of the interviewees, some interviews were conducted via video conference and telephone (The tables on pp. 31 and 33 show the interview method of each interview).

Choice of respondents

The interviewees were primarily chosen because of their relevance for the thesis – the relevance of each interviewee group will be outlined below – yet, an element of snowballing was present as I had to ask some interviewees for recommendations on who else to interview. The danger in this is that the organisations recommended to me primarily were ones that had some interest in incoming Chinese tourism, as this was often the reason for the recommendation. This means that the picture of the Danish

tourism sector in this thesis might be one of a tourism sector that is more interested in Chinese tourism, than what really is the case. On the other hand this thesis has no aspirations in terms of making generalisations about the Danish tourism sector and I will argue that patterns in the understandings and strategies of the represented companies, who because of their interest all have perspectives on the subject, is very relevant and interesting in the discussion of Chinese incoming tourism to Denmark. I will thus argue that the results of this thesis are *reliable* if understood as patterns within the Danish tourism sector, rather than overall generalisations about it.

The interviews conducted for this thesis can be divided into two groups: 'Experts on Chinese Tourism' – four interviews and 'Representatives of the Danish tourism sector' – 12 interviews. Some of the companies and/or representatives requested that their names/titles were not mentioned and therefore they will be represented by a synonym in the table below and in the rest of the thesis. I also need to emphasise that the "expert" title is one that I have provided due to the respondents work in their respective fields and not a title that they necessarily normally carry or answer to.

Experts on Chinese Tourism

The interviews with the 'Experts on Chinese Tourism' are used to challenge and get in depth perspectives on the issues dealt with in the literature review.

Two China based tour operators who work with Chinese outbound tourist to Denmark, as well as two researchers on Chinese outbound tourism were chosen as the experts to represent the 'Experts on Chinese Tourism'. These candidates were chosen because all of them have extensive knowledge on Chinese tourism and because it is expected that the researchers can provide a bird's eye view of the different aspects of Chinese outbound tourism, while the tour operators can provide more practical knowledge. A potential weakness in this choice of respondents is that the tour operators were chosen despite the bias that they may potentially have because of their own interest in getting Chinese tourists to Denmark. I am aware of this potential weakness throughout the thesis and will try to counterweigh it by also focussing on the perspectives of some of the representatives of the Danish tourism sector who have some expert insight into Chinese outbound tourism – specifically the two DMOs and SAS – and by

explicitly mentioning when this potential bias may be present. An overview of the 'Experts on Chinese Tourism' can be seen below.¹

Company/organisation	Company type	Representative	Interview method
Researcher 1 (R1): Copenhagen Business School	Business School	Associate Professor, Institute for Economy and Company Leadership. Centre for Leisure and Culture Services and Centre for International Business and Emerging Markets	Telephone
Researcher 2 (R2): COTRI China Outbound Tourism Research Institute	Tourism Research Institute	Research Assistant	Video Conference
Catholic University of Eichstaett-Ingolstadt	University	PhD Candidate	
China Based Tour Operator	Tour Operator (T01)	Anonymous	Telephone
Genuine China Tours	Tour Operator (T02)	Owner	Telephone

Danish tourism sector

These interviews provide perspectives, views and understandings from different representatives of the Danish tourism sector, on Chinese outbound tourism and the relevance of incoming Chinese tourism to Denmark in particular. These representatives include: Three, four and five star hotels in Copenhagen as 83% of the Chinese bed nights in Denmark are in Copenhagen (Wonderful Copenhagen 2011) and since Chinese tourists generally prefer to stay in three to five star hotels (Xie & Miao

¹ Henceforward the abbreviations indicated in parenthesis will be used to describe the interviewees. A list containing all abbreviations and their meaning can be found in Appendix 1

2009:239; Becken 2003:2); Attractions in Copenhagen and Odense since these are the main destinations for attractions for Chinese tourists – they often take one day trips to Odense (Visit Denmark interview; Scandinavian Tourist Board 2012); Visit Denmark and Wonderful Copenhagen (Danish DMOs) since the DMOs have the main responsibility in terms of attracting tourists to Denmark, and specifically these two because they are the ones with most experience with Chinese tourists (other DMOs was asked to participate, but refused claiming that Visit Denmark and Wonderful Copenhagen are the ones responsible for incoming Chinese tourism); One flight carrier – SAS - was included because they have a main role in making Denmark an accessible destination for Chinese tourists and finally an incoming bureau who take in Chinese groups was included, because of their potential insight in the Chinese market.

Company	Company type	Representative	Interview method
Brøchner Hotels	Hotel 1 (H1): Hotel Group	Anonymous	Face to face
Hilton Hotel Copenhagen	Hotel 2 (H2): Five Star Hotel	Business Development Coordinator	Face to face
Grand Hotel	Hotel 3 (H3): Four Star Hotel	Director	Face to face
Crown Plaza Hotel	Hotel 4 (H4): Four Star Hotel	Director of Sales and Marketing	Face to Face
Copenhagen Star Hotel	Hotel 5 (H5): Three star Hotel	Front Office Manager	Face to face
Visit Carlsberg	Attraction 1 (A1)	Marketing and PR responsible	Face to face
The Royal Danish Collections, Rosenborg/ Amalienborg Castle	Attraction 2 (A2)	Curator - Head of Communication at	Telephone
Odense City Museums	Attraction 3 (A3)	Museum Director	Telephone
Visit Denmark	Destination Management Organisation 1 (DM01)	Director/Responsible for new- and Asian markets	Face to face
Wonderful Copenhagen	Destination Management Organisation 2 (DM02)	International Marketing Director	Telephone
Scandinavian Airlines (SAS)	Airline Carrier (AC)	Vice President Brand, Marketing and EuroBonus	Face to Face
Kuoni Destination Management	Incoming Bureau (IB)	Operation Manager, Nordic Countries	Face to face

Data processing

This thesis investigates the meaning of the information provided by the interviewees in relation to the overall context in which the interviewee acts. Because of the focus on the meaning of what is said rather than how it is said no linguistic analysis of the data was made for this thesis. Therefore the transcriptions (Appendix 5) do not include linguistic elements.

The processing from raw data to analysis ready data has instead been done; first, through a simultaneous transcription and translation, with elements of meaning condensation, as passages that were found to be irrelevant were left out. Second, through a topic based meaning condensation, which highlights the points and topics that are of special relevance to my analysis (Kvale 2007:190). Two meaning condensations were conducted; one for the interviews with the experts on Chinese Tourism – this was based on results of the literature review and the push and pull framework presented here pp. 39 and one for the Danish tourism sector – based on the SWOT framework presented on pp. 83. Both these meaning condensations can be found in Appendix 6.

The fact that I have chosen to leave out certain segments and that I do not include linguistic elements, along with the fact that the transcriptions of the interviews are also translated from Danish to English, can be regarded as a weakness as these choices mean that there is an analytical element to the processing of the data, which is affected by my pre-knowledge and my social constructions. Yet, as objectivity, vis-à-vis my philosophy of science, is unreachable, I will argue that the gain in terms of better overview and less time spent on linguistic elements that are not relevant to this thesis, overshadows the loss. In order to ensure that the reader has the possibility to reach the untouched source data, the sound file of each interview can also be found in Appendix 3.

Validity, reliability and generalisability

Through this methodology section I have outlined the practical, academic and formal confines surrounding the creation of the thesis. In the discussion of these confines it is important to be aware of the three verification terms that form the headline of this section.

Generalisability refers to the degree to which something can be regarded as valid and representative (Kvale 2006:228). As I have already discussed, this thesis cannot be regarded as generalisable to the whole of the Danish tourism sector and has no intention of being so, instead it aims to locate interesting patterns within the actions and opinions of the representatives and from these generate results that give indications about the sector as a whole and potentially acts as inspiration for further, more generalisable, research.

Reliability regards the consistency and replicability of the research results (Kvale 2006:231; Silverman 2006:282). Given the social constructivist approach to this thesis I will argue that replicability is not possible, as people act within their own situational context and their understandings of the world may therefore differ depending on the situation, thus making and replicability and full reliability impossible to reach. Instead I have tried to heighten the reliability of this thesis by being aware of the weaknesses that affect it and externalise the research strategy to the reader. This was especially done in this methodology chapter and in the appendixes that illustrate the methodological tools and processes – interview guides, transcriptions, meaning condensations etc.

Validity refers to the overall quality of the research and is considered a continuous quality control at all stages of the knowledge production (Kvale 2006:231). Reliability is considered a prerequisite for validity (Bryman 2004:28) yet, again, I will argue that although this thesis cannot be considered fully reliable and thus not fully valid, the fact that its weaknesses are articulated and discussed throughout, and that a number of measures, has been taken to heighten the validity, makes it so that the end product of this thesis can be regarded as valid within the confines mentioned in this chapter.

CHINESE OUTBOUND TOURISM



What makes a destination "China ready"?

PUSH & PULL - A THEORETICAL FRAMEWORK

What motivates Chinese tourists to go travelling and what motivates them to choose a certain destination? These questions are undoubtedly on the minds of most tourism businesses who wish to attract Chinese tourists to their destination. The reason for this is that understanding tourist motivations is often the key to attracting a specific tourist segment. Thus motivation can be seen as "... *the driving force behind all actions*" (Pearce 2005:50) or the "... *the impelling and compelling force behind all behaviour*" (Berkman and Gilson 1978 in Crompton 1979:408). According to Moutinho it is motives, along with stimuli, that turn intention into choice of product or destination (Moutinho 1993:27), while Pearce argues that "... *it has been widely suggested that various tourist visit patterns are the result of a destination-choice process which, in turn, is influenced powerfully by tourists' motives and backgrounds.*" (Pearce 2005:54).

Many different researchers has dealt with motivation and its relation to other important variables in a variety of different ways (Dann 1981; Ross & Iso-Aloha 1991; Plog 1974; Fodness 1994; Uysal & Jurowski 1994, Gnoth 1997) but yet no wide consensus on a single theoretical or conceptual framework has been reached (Li & Cai 2009:2; Pearce & Lee 2005:226). One of the only widely agreed on frameworks within tourism motivation research is the framework of a motivational *push* and a destination *pull* (Uysal & Jurowski 1994:844; Kozak 2003:222; Crompton 1979:409; Dann 1981:189).

According to Crompton, push motives are traditionally useful for explaining the desire to travel (Crompton 1979:410). They are origin-related and refer to the intangible, intrinsic desires of the individual traveller, for example the desire for escape, rest and relaxation, adventure, health or prestige. (Kozak 2003:222; Uysal & Jurowski 1994:844). Pull factors are, according to Crompton, useful for explaining the choice of destination (Crompton 1979:410). These are related to external factors such as the attractiveness of a given destination and tangible characteristics such as attractive nature or sights (Uysal & Hagan 1993 in Kozak 2003:222). Bowen and Clarke emphasise that push and pull should not be considered a dichotomy, push and pull factors are thus not separate decisions made

at separate points in time, but rather factors that one person can engage simultaneously (Bowen & Clarke 2009:92).

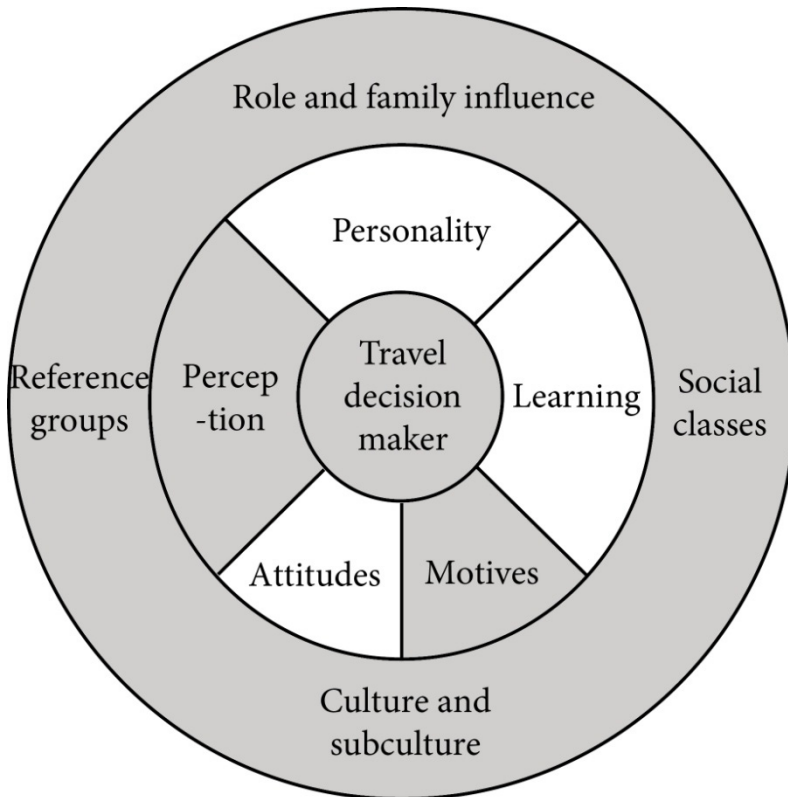
This thesis will address both push and pull factors. The push factors will be addressed, though a detailed analysis of the travel motivations of Chinese tourists, which will already begin in the categorization, used in the literature review and be addressed further in the following analysis. Since I do not have access to any primary data on the Chinese tourists perception of Denmark, the pull factors will be investigated based on the results of the literature review combined with the statements of the 'Experts on Chinese Tourism'.

In the following I will explain the theoretical push and pull framework further. Yet, before I do so it is important to emphasize that motivation cannot be regarded as something isolated but is "*... is only one of many variables which may contribute to explaining tourist behaviour.*" (Crompton 1979:408).

Push & Pull within consumer behaviour

A number of different consumer behaviour models that illustrate the tourist decision making process have been made (e.g. Moutinho 1987; Um & Crompton 1990 and Gnoth 1997), yet all of them have often been criticised in numerous ways. Bowen and Clarke lists 15 examples of limitations that has appeared in relation to the modeling of consumer behavior; two examples of these limitations that are especially important in relation to this thesis are, firstly, that the models are "*... biased toward a positivist stance that views decision making as a traditional, formal, sequential, multistage process*" (Bowen & Clarke 2009:62). Among other things this is an important issue because it goes directly against my social constructivist approach. Secondly the "*... linkage and, therefore, relationships between elements are not clear*" (Ibid), which often seems to be a problem when modeling processes. One consumer behavior model that does not suffer from these two weaknesses and at the same time acts as a good model to illustrate the focus points of this thesis, is Mayo & Jarvis model "Influences on the travel decision maker" which I will explain in the following.

Influences on the travel decision maker



(Mayo & Jarvis 1981 in Ibid:63 (modified))

According to Bowen & Clarke, Mayo & Jarvis do not, like others, assume that all tourist decisions are extensive and take a long time to make, neither do they assume that tourists have a high perceived need for information and low perceived knowledge about alternatives (Ibid). Instead *"They suggest that some decisions may be routine or impulsive"* (Ibid). In addition to this, the model highlights the influence of social and psychological factors which are often ignored in other models of consumer behavior.

The model consists of two rings surrounding the *travel decision maker*; the inner ring consists of internal psychological factors, while the outer ring consists of external social factors (Ibid:64). For the part of the the-

sis where this theory will be utilized the empirical base is, as mentioned earlier, existing literature that mainly deals with the motivations and needs of Chinese outbound tourists as well as interviews with experts on Chinese outbound tourism. This means, that while I will be able to focus on the *motives* of the Chinese tourists I will to a lesser degree be able to focus on the other parts of the inner ring, as data that include information on these subjects is not directly available to me and hard to come by because of their internal and thereby often implicit nature. In spite of this I will, based on the interviews with the 'Experts on Chinese Tourism' as well as the motivations found in the literature, try to get an impression of the Chinese tourists perception of Denmark as a potential travel destination, especially with the goal of identifying important pull factors when attracting Chinese tourists. As mentioned the factors of the outer circle are external and are therefore easier to access from the available data, especially if seen in relation to the motives of the Chinese tourists. Elements of these factors will therefore be included in the analysis when relevant although they will not be the main analysis subjects.

The factors marked with grey in the model above are thus the main focus areas of this thesis. I therefore need a framework within motivation theory that takes into account the internal *Motives* (Push) and *Perceptions* (Pull) of the *Travel decision maker* as well as the *external factors* that affect these motivations.

Motivations and typologies

Many tourism motivation researchers has the mapping of specific tourism motivations as their goal (Echtner & Richie 1991:45; Pearce 2005:58; Ballentyne et al. 1998:17 and Moutinho 1993:17), for example Ryan who identified "*escape, relaxation, play, social interaction, strengthening family bonds, prestige, sexual opportunity, educational opportunity, self-fulfillment, wish or dream fulfillment and shopping*" (Ryan 1991:21-29 in Bowen & Clarke 2009:90) as important specific motivations. Other researchers try to describe certain typologies within the motivations of the tourists. Decrop & Snelders divide these into two groups – segmentation criteria, which mainly include demographic characteristics as well as expenditure, distance travelled, destination, frequency of travel etc. (Decrop and Snelders 2005:122) and socio-psychological variables which according to Bowen and Clarke for example includes Gray's 1970 "sunlust" and "wanderlust" tourists, Smith's 1989 explorer, elite, offbeat, unusual, in-

ipient mass, mass and charter tourists, and Plog's 2002 dependables and venturers (Bowen & Clarke 2009:97).

Elements of both the specific tourism motivations and Decrop & Snelder's two groups will be included in the motivation analysis in this thesis. Thus specific motivations of Chinese outbound tourists that seem to be dominant in the literature will be used to describe common ground in terms of the motivations and needs of the Chinese tourists. Demographic segmentation criteria will be used to describe the typical Chinese tourist, while clusters of socio-psychological aspects will be used to make characterizations of Chinese outbound tourist in general.

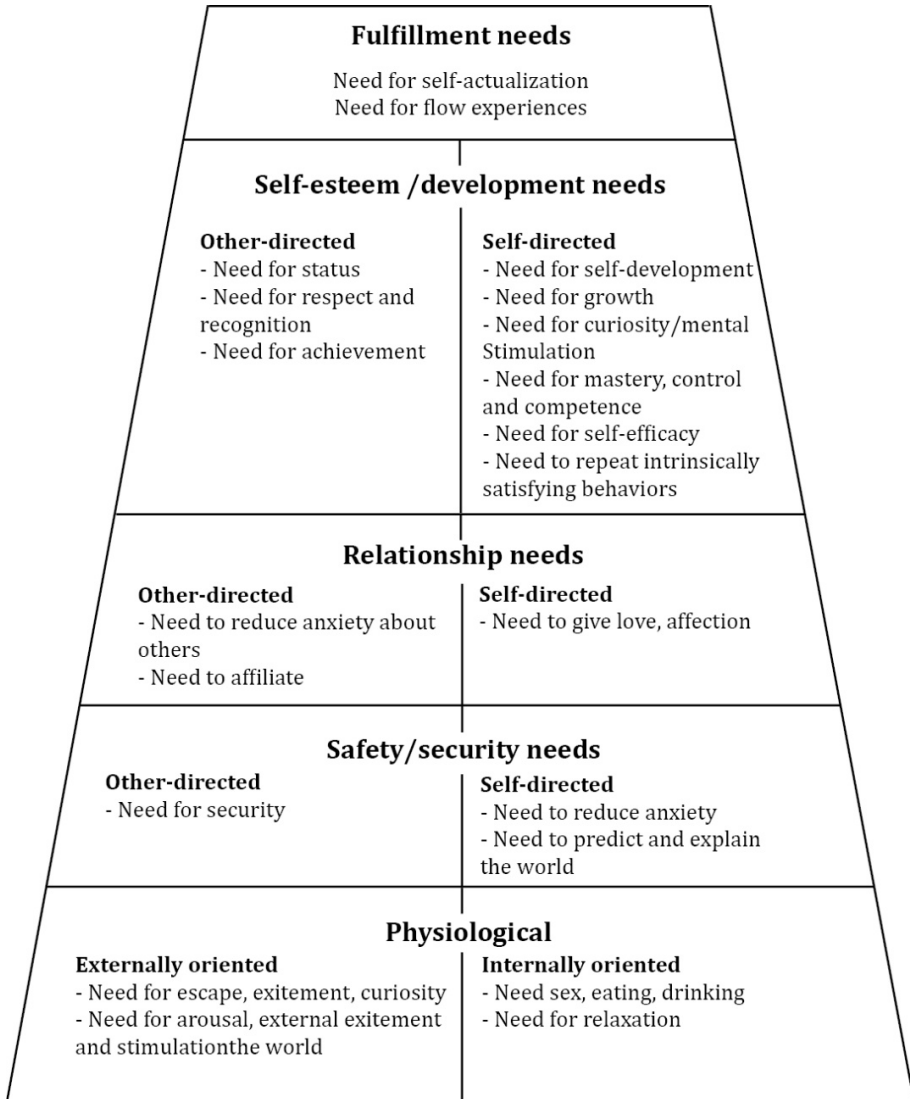
As mentioned, the analysis of the pull factors will be based on the statements of the 'Experts on Chinese Tourism' as well as the results of the analysis of the pull factors, since no data on Chinese tourists' perception of Denmark is available to me. I do however have access to data on the motivations of the Chinese tourists and therefore I will need a more comprehensive theoretical framework for the analysis of the push factors.

Travel Career Needs

I have chosen Pearce's travel career needs model as the main theoretical tool for the analysis of the push factors. This is mainly because the model recognizes that motivations change over time and are flexible, as it works with motivational patterns that may differ from tourist to tourist, instead of strict hierarchies or flow models that require that motivations come in a specific order (Bowen & Clarke 2009:62; Goeldner & Richie 2005:256). The model thus gives the researcher the opportunity to create "*... a rich multi motive picture of travel motivation*" (Ibid). In the following I will further explain Pearce's model and how it will be utilized in the analysis, I will also elaborate on the relevance of the model in the context of this thesis and criticise it for its weaknesses.

In collaboration with respectively Caltabiano (Pearce and Caltabiano 1983) and Moscardo (Pearce and Moscardo 1985), Pearce (Pearce 1982) has attempted to bridge the gap between motives and motivations with an interpretive methodology, by combining tourists' situational descriptions with categories from Maslow's needs hierarchy (Maslow 1954 in Gnoth 1997:294). After many iterations this work resulted in the "Travel Career Needs model" (Goeldner & Ritchie 2009:261) - a hierarchy of trav-

el motivations which emphasizes that people have a range of motives for seeking out holiday experiences and for going on holiday in the first place (Pearce 2005:53).



Pearce's Travel Career Needs model (Goeldner & Ritchie 2005:257)

Externally and internally oriented needs

The travel career needs model consists of five needs-categories starting with physiological needs, which are divided into internally and externally oriented needs. The internally oriented needs being basic bodily urges such as the need for food, relaxation and sex, while the externally oriented needs are psychological needs oriented toward the outside world for example the need for excitement.

Self and other directed needs

The next three categories – safety/security, relationship and self-esteem/development needs – are divided between needs that are directed towards the self and other directed needs. The difference being that the self-directed motivations satisfy personal needs such as the need to reduce anxiety or the need for self-development, while the other-directed needs are often related to other people. This can both be from an egotistical standpoint where one wants to look better in front of others, but also from a compassionate standpoint where one for example wants to reduce anxiety for others (Pearce 1996 in Ryan 1998:937).

I will argue that there is a general weakness in Pearce's division between self and other directed needs and externally and internally oriented needs, as I will argue that needs and motivations are always affected by the surrounding environment, or - referring to my social constructivist approach - the social construction that the person is a part of. An example of this is that other-directed needs, in the long run, are also meant so satisfy deeper rooted self-directed needs. A person's other-directed need for status – looking better in the eyes of others – may for example be due to a self-directed need for approval. Based on this I will argue that Pearce's division between self and other directed needs and internal and external needs is not possible when working from a social constructivist approach and this division will therefore be ignored in my utilization of the model.

Fulfillment needs

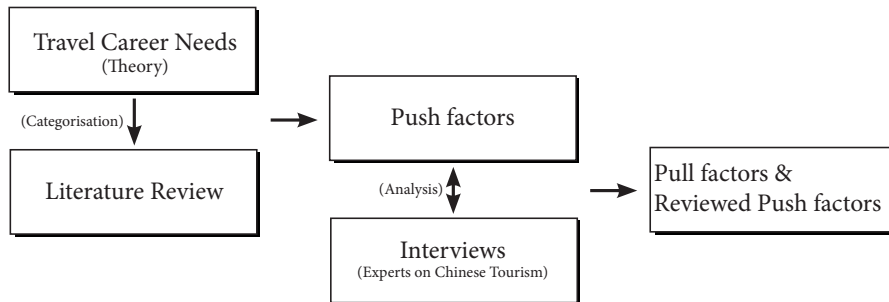
The last needs category is fulfilment needs, this category is only at an individual level and includes travel needs and motivations that are of a life changing nature, such as the need for self-actualization (Goeldner & Ritchie 2005:257).

Application

Pearce's model has since it was created been revised by many researchers, among others by Pearce himself, who argues that too much attention has been drawn to the ladder concept, meaning that people mistakenly think that you have to start from the bottom and that you can only be at one step at a time (Pearce 2005:54). This is not the case and therefore the model has been redubbed from "Travel Career Ladder" to "Travel Career Needs Model" (Goeldner & Richie 2005:256). Most of the criticism of Pearce's theory addresses the fact that the model is based on Maslow's needs hierarchy, which according to Fodness "*... has thus far proven resistant to valid and reliable operationalization*" (Fodness 1994:558). Yet, while this criticism might be valid, much of it is aimed at the ladder concept, and does thus not apply to the newest iteration of the model.

In this thesis the model will be utilized in two different ways. Firstly it will be used as a categorisation tool for the motivations that come forward in the literature review (pp. XXX). I will thus go through each motivation category in Pearce's model and discuss the motivations that fit into this category in terms of why they fit into this category, what this implies about Chinese outbound tourists and finally, what questions this raises for the further analysis and discussion. Secondly, the model will be used as the primary analytical tool in the discussion and analysis of the results of the literature review in relation to the views of the 'Chinese tourism experts'.

Identifying Push & Pull factors



The model above sums up the theoretical framework, which will be utilised in the making of the literature review and in the following analysis of the results of this review in relation to the perspectives of the 'Experts on Chinese Tourism'.

Pearce's Travel Career Needs model is used to categorise and discuss the motivations of the Chinese tourists according to the literature. From this discussion a number of push factors that affect Chinese travellers are identified. The push factors found through this categorisation will then be further analysed and discussed in relation to the interviews with the 'Experts on Chinese Tourism'. Combining the general push factors found in the literature with the experts' perspectives on the attraction of Denmark in a Chinese context should provide an understanding of pull factors that are important for Denmark as a destination when attracting Chinese tourists, as well as a reviewed and deeper perspective on the push factors from the literature review.

LITERATURE REVIEW

"China is changing the world's tourism pattern"
(Zhang & Liu, 2008, p. 153)

Contentions like this are not uncommon in tourism literature, but tourism marketers and industries around the world might be asking themselves who are these Chinese tourists? How do they travel? Where do they go? And, most importantly, how do we motivate them to choose our destination?

In the following I will present a literature review that tries to answer these questions by comparing and discussing research on Chinese outbound tourism and the motivations of Chinese outbound tourists in particular. While I will present some thoughts during the review, additional conclusions and points of discussion in relation to the literature will be presented in 'What makes a destination "China Ready"' (pp. 65) where I will discuss the results of this review in relation to perspectives of the four 'Experts on Chinese Tourism'.

Who are the Chinese tourists?

One of the main purposes of this thesis is to answer the question of whether the Danish tourism sector is ready for Chinese tourists, but in order to do so I must first establish a broader conception of who the Chinese tourists are in terms of socio-cultural and demographical characteristics. I have chosen to do this by finding the characteristics of "the typical Chinese tourist" according to the literature.

A problem in doing this is that, by establishing a socio-cultural/demographic model of "the typical Chinese tourist", I imply that all Chinese tourists are alike and that all Chinese people are similar only based on the fact that they can be labelled as Chinese - a label that might as well be one of them being Asian, from a particular province, city or even family. The reason that I have chosen to do so in spite of this risk will be explained in the following.

Nationality matters

Among others Kau & Lim argue that *"It is evident that the Chinese out-*

bound travel market should not be regarded as one huge market with homogeneous travellers." (Kau & Lim 2005:246). This is true since Chinese culture, as well as all other cultures, is built from a number of different subcultures and social classes with their own characteristics, behavioural forms and values (Wang et al. 2008:324). However it can be argued that doing so is justifiable as long as the researcher is aware of this limitation. An important argument in this respect is that research has shown that nationality in fact does matter, for example the United States Travel and Tourism Administration according to Pizam & Sussman conducted a series of surveys among potential Japanese, Australian, British, German, and French vacationers. This study pointed to significant differences among the nationalities in terms of vacation preferences and the importance of various factors in choosing a destination (Pizam & Sussman 1995:903). The results of Pizam & Sussman's own research also indicated that in 90% of the behavioural characteristics that they researched there were significant differences depending on nationality (Ibid:915) and they further argue that *"Several investigators, using both direct and indirect methods of assessment, have generated a great deal of evidence suggesting that nationality influences tourist behaviour."* (Ibid:904). This indicates that although there are dangers in treating Chinese travellers as one homogenous mass, as suggested Kau & Lim, valid results can be found when doing so, as long as the researcher is aware of the limitations.

The typical Chinese tourist

Defining the demographical characteristics of Chinese outbound tourists has not been the main subject of much research. Yet, by comparing the few that do with the characteristics of respondents in literature that focus on other issues, but still has a research base consisting of a large group of Chinese travellers, clear patterns can be found. It is important to be aware that the patterns and the results that I derive from these patterns are momentary and might therefore change with time. For example the older segment which I will explain is not particularly interesting now, might be so in ten to twenty years when the richer middle aged group grows to be a part of this segment.

The typical Chinese outbound tourist will more often be male than female - although the extent to which this is the case differs from study to study. Some studies have a strong predominance of males over females for example Cai et al. where the males represent 72% (Cai et al. 2001:7) while other studies are more balanced although the male dominance re-

mains, for example in Kau & Lim and Seongseop's studies where the men represent respectively 56% and 54% (Kau & Lim 2005:235; Seongseop et al. 2005:215). The Chinese outbound travellers generally tend to be well educated as 70% to 80% has either a graduate or university degree (Li & Cai 2009:3; Seongseop et al. 2005:215; Kau & Lim 2005:235). They mainly work as managers/executives (Kau & Lim 2005:235; Cai et al. 2001:7) and are therefore most often from high- to middle-income groups (Seongseop et al. 2005:215; Becken 2003:2; Ryan & Mo 2002:25). Generally Chinese outbound tourists are from the bigger cities or the relatively rich east coast of China (Euromonitor International 2011; Guo et al. 2007:319). The literature also indicates that around 80% of the Chinese travellers are under the age of 40, while the biggest group are between 25 and 45 years of age (Kau & Lim 2005:235; Euromonitor International 2011; Li & Cai 2009:3; Ryan & Mo 2002:25).

Thus the literature indicates that a certain market segment is dominating within Chinese outbound tourists and that the typical Chinese tourist can be described as such: A well educated man, between 25 and 45 years of age, who lives either on the east coast or in a big city and earns a relatively high income. Although this segment is relatively broad, the dominance of the segment indicates that the young and the older segments, according to the literature, today and in the near future, are not as important when trying to cater to the Chinese tourist in general. In relation to the representatives of the Danish tourism sector this raises questions with regard to their knowledge of and reaction to this segmentation.

How do they travel?

According to a study made by Euromonitor International five main types of travel can be identified among Chinese travellers going to Europe: Tour groups, Individual travellers, Students and their families, Family groups and business travellers (Euromonitor International 2011). As mentioned earlier, this thesis focuses on leisure travellers and therefore student-, and business-travellers are not taken into account, although the activities they do in their leisure time might have an effect on the results of the literature in this review.

Out of the five mentioned travel types tour group travel is clearly dominating among Chinese leisure tourist (Chang 2007:1; Pan & Laws, 2002:44; Mok & DeFranco 1999:109). The main reasons for this are that it is ge-

nerally convenient, it keeps costs low (Lai et al. 2010:743), it makes it easier to get a visa (Euromonitor International 2011) and it includes a mandarin speaking guide (Can-Seng 2007:8) (I will discuss language related problems further later in this review). Another reason for the popularity of package tours is according Guo et al. that Chinese travellers prefer trips that include multiple countries (Guo et al. 2007:318), yet other researchers argue that this tendency is changing and that the fast-paced sightseeing tours are gradually being replaced by slow-paced, in-depth tours (Xie & Miao 2009:239). Wong & Kong as well as Lai et al. agree with this notion and Lai et al. presents qualitative statements such as *"I prefer longer stays at fewer locations."* (Lai et al. 2010:745; Wong & Kwong 2004:590) which suggest that the proneness to take in multiple destinations in a very short time might be declining. This indicates a tendency toward more relaxing group tours with fewer scheduled activities (Chow & Murphy 2008:76; Chengcheng 2006:8).

This trend is further backed by a rising tendency toward independent travel. Independent travel is still very much a niche within Chinese outbound tourism and is often limited to Chinese students studying abroad; Chinese expatriates living abroad; couples with living abroad experience; adventurous young professionals and wealthy retirees, all of them with high English level (Euromonitor International 2011). However because independent travel is rising especially among the younger and more "trendy" part of the Chinese tourist population, with Chinese sayings such as *'the poor go group travelling and the rich go holidaying'* (Becken 2003:11) it will probably continue to rise as these young travellers affect and inspire others and grow up to be the main tourism segment (Beverley & Pan 2009:492).

Catering to groups and independents

With this in mind one could argue that tourism industries who want to be attractive to the Chinese outbound tourism market need to prepare for a change toward more independent travel. However, as mentioned there is not agreement in the literature when it comes to the importance of this shift and considering the fast development in the number of Chinese outbound tourists in general, there is no reason to believe that a shift toward more independent tourists will make group tourism insignificant. This indicates that tourism sectors that want to cater to Chinese tourist should either choose to focus on one of the two segments or try to cater to both of them.

Chinese tourists and their motivations

Doctoroff states that “... *the Chinese are different.*” (Doctoroff 2005:2). The fact that Chinese travellers are different becomes visible when looking at the literature on the travel motivations and preferences of Chinese tourists. Arlt for example argue that Chinese tourist behaviour is not based on western individual values such as self-actualisation, recreation as non-activity, individually experienced authenticity etc. and therefore assumptions of ‘classical’ tourism behaviour as well as the expectations of the tourism sector outside the ‘Chinese world’ do not adhere to this tourism segment (Arlt 2006:10). This makes it very relevant to investigate the motivations of Chinese tourists in order to find out how they differ from western tourists or even other Asian tourist groups and most importantly, how to attract them to a given destination. A fair amount of research has been done on this topic and in the following I will try to create an overview of the results of this research and also try to find patterns in these results in order to gain a better perspective on the motivational wants and needs of Chinese outbound tourists.

In doing so I will combine research on the general travel motivations of Chinese outbound tourists with research on motivations of Chinese tourists in relation to specific destinations, as well as research on the preferred travel activities of Chinese tourists. Of course some challenges occur when trying to compare and analyse the results of a number of different studies. In this case especially the fact that many different terms or questions has been used and asked by different researchers to describe or answer similar things is one of the biggest challenges. In order to overcome this challenge I will utilize Pearce’s travel Career Needs Model (Goeldner & Ritchie 2009:261) to segment the general motivations, destination specific motivations and preferred travel activities into groups that provide an overview of the Chinese outbound tourists travel motivations. In this review the theory will mostly be used as a segmentation tool, further analysis and discussion of the results of this segmentation in relation to the empirical data can be found in on pp. 65.

Physiological needs

In the literature a number of needs that can be regarded as Pearce’s physiological needs are mentioned, some of them are very specific, such as needs for hot drinking water at attractions - because Chinese people don’t drink cold water (Wang et al. 2008:324) or the need for basic hotel amne-

ties that Chinese tourists are used to from Chinese hotels “... *toothbrushes, combs, shampoo and lotion, slippers, shoe mitts, even disposable razors and shaving cream*” (Lai et al. 2010:744), while other needs are broader and more complex such as needs related to food (Chen 2002 in Becken 2003:5). I will give a deeper explanation of this need in the following, since it receives much attention in the literature.

Have you eaten?

One of the most important groups of physiological needs among Chinese tourists, are the needs related to food. Eating and drinking is an extremely important part of Chinese culture, this for example shows in the most common greeting in China “Chi Fan Le Ma” literally meaning “Have you eaten?” (Ibid; Wang et al. 2008:320; Sinclair & Wong 2001:228; Lin 2004:328).

The main problem in relation to this is that most Chinese people do not like western food, dismissing it as being “... *too sweet, unhealthy (few vegetables and fruits, high calories), with too many uncooked or cold dishes (including ice water), and too much fried food*” (Lai et al. 2010:745). And even though the more open minded Chinese tourists are willing to try local cuisines, the tourists in for example Lai’s study admit that they could not do that for too long or too often (Ibid). One of his respondents says “*Chinese food should be available every day. For example, if lunch is Western style, dinner should be Chinese.*” (Ibid). The notion that Chinese people to a large extent need Chinese or at least Asian food and that this is a problem that affect the travel experience is common in the reviewed literature. This becomes evident because food related issues are often mentioned in cases where the Chinese travellers otherwise generally have been very satisfied with their trips abroad (Chengcheng 2006:7; Lai et al. 2010:743; Hoare et al. 2011:358).

Providing Chinese cuisine can thus be a good way to give *face* (this concept will be explained in ‘Relationship Needs’) - and a better experience to the visiting Chinese tourist and for example hotels should thus ideally have Chinese food on offer. It can be argued that it is not possible for all hotels or even all destinations to offer Chinese cuisine and while this is true, the above also indicate that learning about Chinese lifestyle and culture could prove valuable, as acting respectfully and providing other options in a situation where no Chinese food is available potentially could turn a *face* reducing situation into a *face* enhancing one.

Safety/security needs

One of the most important single motivational needs for Chinese tourists is the need for safety. Thus, many different researchers has found that safety at the destination is, if not the most important motivational factor, then at least in the top three (Seongseop et al. 2005:219; Becken 2003:3; Yu & Weiler 2001 in Lai et al. 2010:743; Lai et al. 2010:744). According to Beverly & Pan the high safety consciousness of Chinese tourists means that they are not willing to take risks in travelling to places perceived to be dangerous (Beverley & Pan 2009:493). In their study of Chinese tourists travelling to New Zealand Ryan & Mo also found that one of the main reasons that the Chinese tourists choose New Zealand as a holiday destination was because it is perceived to be a safe destination (Ryan & Mo 2002:22).

The fact that Chinese tourists are highly safety cautious is an advantage for the Danish tourism sector because Denmark is, and is generally perceived to be a safe destination. The safety caution of the Chinese tourists could also indicate that adventurous activities such as extreme sports should not be marketed to the Chinese. An indicator that adventure for Chinese tourists does not involve danger is that “adventure” or “exploration” when mentioned as a main motivation in the literature is often mentioned in relation to city holidays, where the adventure element seems to be more focussed on experiencing something new, than trying something dangerous (Kau & Lim 2005:236; Du and Zhang 2003 in Chow & Murphy 2008:65).

Relationship needs

Chinese people are, according to Becken, generally very interested in the outside world and other cultures - western culture in particular (Becken 2003:3). This may be the main reason why relationship needs such as the need to experience local people, lifestyle and culture, according to the literature, are relatively important motivations for Chinese outbound tourist (Du and Zhang 2003 in Chow & Murphy 2008:65; Yu & Weiler 2001 in Lai et al. 2010:743; Chow & Murphy 2008:74). Examples of these motivations are that they want to “... *feel the special atmosphere of the vacation destination.*” or “... *observe people in the area.*” (Li & Cai 2009:3). In Chengcheng’s study of Chinese tourists going to New Zealand, friendly people and a low population are also mentioned as a primary motivations when choosing to go there (Chengcheng 2006:5).

The importance of *face*

There is no clear translation of the Chinese *face-term*, but the meaning of it is so similar to Goffman's face-concept that his definition can be used to explain what it is. *Face* can be defined as "... *an image of self delineated in terms of approved social attributes*" (Goffman 1955:213). It is very important for Chinese people to uphold one's *face*, as well as to give *face* to others. Putting others in a position where they lose *face* – for example by criticising them in front of others – is viewed very negatively. Catering to the basic needs of Chinese tourists will, according to Mok & DeFranco make them feel welcome and is therefore *face* enhancing, while ignoring these needs and putting them in an awkward position might in the worst cases end up being *face* reducing on the part of the tourist, which in Chinese culture is embarrassing both for you and the person who lose *face* (Mok & DeFranco 1999:108). In terms of travel motivation this means that if a hotel or destination market themselves as welcoming and thereby "*face* enhancing" to Chinese tourist they will have a much stronger appeal to the Chinese tourists segment (Ibid).

Service and language related needs

In terms of giving *face* maybe the most important relationship need is the need for high service level. One of the respondents in Hoare et al.'s research for example states that "... *wait staff are expected to treat customers with respect according to well-known-to-all customs and give face to customers.*" (Hoare et al. 2011:367). A major problem in this respect is the big gap that exists in the perception of service quality in the East and the West (Ibid 360; Wang et al. 2008:316). This gap mainly comes from the fact that Asian service, according to Riddle, is more people oriented, while western service is more focussed on efficiency (Riddle 1992 in Mattila 1999:377). On top of this Wang's research indicates that "... *the Chinese 'working culture' which emphasizes long hours and hard working makes the tourists believe that English service style is too 'laid back'.*" (Wang et al. 2008:320) – a notion which probably also applies to other European countries including Denmark. Another important difference that Wang et al. emphasise is that for example hotel employees are in a less-powerful position in Chinese culture, and are thus expected to pay high respect to the hotel guests and respond to their requests wholeheartedly while making use of ritualistic behaviour such as smiling, greetings, and hand shaking (Ibid:317). All of these practises are less common in European countries like Denmark "... *sometimes guests cannot even meet any employees at the reception desk*" (Ibid:320).

Another relationship need, which is strongly connected to service issues are language related needs, as it is difficult to service costumers if you don't understand each other. The majority of the Chinese population speaks very little or no English although the general English level is getting better. On top of this the literature shows that Chinese tourist often find that their experiences are hindered by language difficulties (Can-Seng 2007:8; Kau & Lim 2005:243; Ryan & Mo 2002:25).

The issues related to the service and language needs of Chinese tourist are obvious when looking at the literature dealing with the subject. Yet, while these needs challenge tourism businesses that want to cater to Chinese tourists they also present an opportunity to attract Chinese tourists by offering *face* enhancing services in order to diversify from the competition. In relation to this it will be interesting to look into the Danish tourism sector's considerations and potential practises in relation to service and language issues.

Self-esteem/development needs

Prestige/status

Many of the researchers in the reviewed literature agree that status and or prestige is, if not the most important, then at least a very important motivation to travel abroad for Chinese tourists (Ap and Mok 1996 in Mok & DeFranco 1999:108; Li & Cai 2009:5). In their research on Chinese outbound tourists Li & Cai for example found that this was the most important travel motivation and that *"Acquiring prestige and luxury experience was more important for respondents in the age group of 20-24 than for others."* (Li & Cai 2009:4), which indicates that it will probably continue to be so for years to come. The literature also suggests that achieving status or prestige could be related to other motivational needs that are favoured by Chinese tourists. Becken suggests that Chinese tourists' *"... great emphasis on status, (...) leads them to visit the most popular attractions within a destination"* (Becken 2003:3). In the reviewed literature sightseeing is mentioned as one of the most important travel motivations in almost all the studies (Cai et al. 2001:13; Chow & Murphy 2008:74; Kau & Lim 2005:236; Ryan & Mo 2002:22; Du and Zhang 2003 in Chow & Murphy 2008:65) and in many cases, for example Beverly & Pan and Yu & Weiler, sightseeing for Chinese tourists means that they have visited or want to visit the most famous attractions at the destination (Beverley & Pan

2009:492; Yu & Weiler 2001 in Lai et al. 2010:743). This could indicate that the need for status or prestige often leads to the need to go sight-seeing, because seeing the famous attractions of a place is seen as status enhancing.

Before drawing this conclusion however, one must be aware that Chinese travellers, as mentioned earlier, primarily travel via group tours, which means that they will often only have access to the famous attractions. The question in this regard is then whether Chinese tourists choose group tours because they only want to see the famous attractions or if they only see the famous attractions because it is the only option when going on group tours. I will discuss the relation between travel type and attractions further in the following analysis.

Another important motivational need that seems to be connected to the need for status/prestige is the need for shopping.

Shopping

According to the literature one of the most appealing things about Chinese tourists apart from their sheer numbers is their high spending at the destinations (Pan & Laws 2003:39; Jie & Carr 2004:33). *"It is argued that the Chinese on average is among the top five spenders on leisure tourism and are expected to exceed other nationalities to become the world's top tourist spenders in the future."* (Zhang & Liu, 2008:432). However it is also argued that although Chinese tourists prefer to stay in three to five star hotels it is on shopping that they spend most of their money, not accommodation or transportation (Xie & Miao 2009:239; Becken 2003:2). Guo et al. for example argue that *"The proportion of shopping expenditures to all expenditures by Mainland Chinese tourists abroad is significantly larger than other expenditures"* (Guo et al. 2007:322).

Along with the high spending in relation to shopping many researchers also mention shopping as a main travel motivation for Chinese tourists (Cai et al. 2001:10; Mok & DeFranco 1999:106; Chow & Murphy 2008:74). Apart from obvious reasons for the high expenditure such as availability of and good prices on certain products (Guo et al. 2007:322; Euromonitor International 2011), there seems to be two main reasons for this. First, shopping is, as indicated above, an important part of the Chinese tourists' need for status/prestige *"... electronics and famous brand-name items are favoured among Mainland Chinese tourists because of their high prices,*

which reflect status and prestige for their owners.” (Guo et al. 2007:322), which is why it can be regarded as a self-esteem/development need in Pearce’s model. Second, buying gifts for relatives is a customary, *face* enhancing gesture toward friends and relatives in China and a large portion of the shopping expenditures will therefore often be on gifts (Wang et al. 2008:323; Pan & Laws 2003:42). For this reason it could be argued that shopping could also be positioned as a relationship need in Pearce’s model.

For the further discussion in this thesis I must consider both the fact that Chinese tourists are high spenders and the fact that they spend most of their money on shopping, as this might have an effect on the representatives of the Danish tourism sectors’ view of the Chinese tourists. Aside from this the literature indicates that Chinese tourists can be encouraged to visit a destination if it offers good shopping opportunities. The question in this regard is what a good shopping opportunity is for the Chinese tourist and whether the Danish shopping product is good enough to attract Chinese tourists or if it should rather be considered as a supporting activity.

Unpollutedness as an attraction

Earlier I explained how sightseeing, according to the literature, is an important motivational need for Chinese tourists and that a part of the reason for this is that it is seen as status/prestige enhancing. Another motivation in this regard that does not seem to be affected by the need for prestige is the need to experience beautiful landscape (Zhang & Murphy 2008:279; Seongseop et al. 2005:219; Yu & Weiler 2001 in Lai et al. 2010:743). An interesting point in relation to this is that often when scenic beauty is described as a motivation for the Chinese to visit a certain destination, it is related to the environmental cleanliness of the destination (Becken 2003:3; Chengcheng 2006:5). In addition to this it generally seems like Chinese tourists see clean environment as a motivator when they choose travel destination for example one of the main motivations in Ryan & Mo’s study was *“To holiday somewhere that is clean and unpolluted”* (Ryan & Mo 2002:22). This need derives from the fact that most Chinese tourists come from densely populated and polluted cities and therefore see travel as a way to experience freshness, and cleanse their soul (Chengcheng 2006:5). Some studies even indicate that environmental cleanliness is more important than the natural attractions themselves *“It was found that the main reason [to revisit New Zealand] was the ‘clean and unspoiled environment’, although interestingly enough the item ‘scen-*

ery' was not thought attractive enough to act as a magnet for future visits." (Ryan & Mo 2002:24). The fact that unpollutedness is seen as an attraction that you travel for, more than something you take for granted, indicates that the need for unpollutedness is a self-enhancing/development need for the Chinese tourist instead of an internally oriented physiological need, which might have been the case for western tourists.

The fact that environmental cleanliness, greenness, freshness, openness and peacefulness, according to the literature, are highly valued destination attributes for Chinese outbound tourists (Chengcheng 2006:5), should be regarded as good news for the Danish tourism sector when wanting to attract Chinese tourists, as Denmark, while lacking world famous natural attractions, is well known as a country that possesses the attributes connected to environmental cleanliness mentioned above. The question related to the further analysis is though, whether and how the Danish tourism sector is aware of and reacts to this advantage.

Fulfilment needs

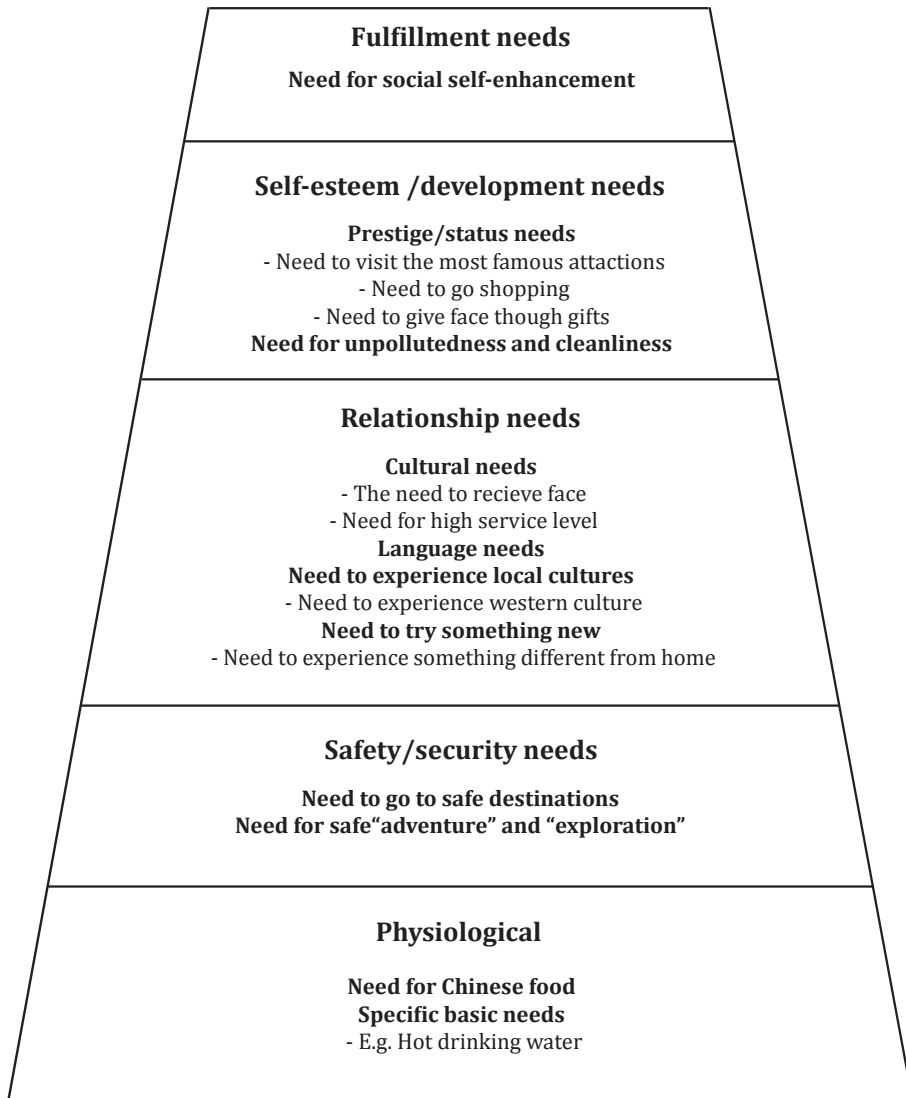
The last needs-category in Pearce's model is fulfilment needs. These needs are typically hard to get information on because self-actualization is something implicit that often happens without specific awareness from the individual. There are though both literature that hints at, and literature that directly deal with the fulfilment needs of the Chinese outbound travellers.

Fulfilment needs are most directly mentioned in Beverley & Pan's study on Chinese outbound tourists in general where "*social self-enhancement*" (Beverley & Pan 2009:492) is among the five most important motivational attributes. In other studies motivations such as wanting to "Visit previously unknown places", "To go to places where I have not been" (Becken 2003:5; Ryan & Mo 2002:22) could be interpreted as motivations that derive from fulfilment needs, although this is not certain. Some studies indicate that increasing knowledge is an important motivator for Chinese outbound tourists (Li & Cai 2009:3), but while this could also be interpreted as a need for self-enhancement, other studies indicate that knowledge acquisition, as it was the case for many of the self-esteem development needs, is linked to the need for prestige/status (Guo et al. 2007:326; Kau & Lim 2005:236) and can therefore not be considered a fulfilment need.

Although fulfilment needs do play a role as a motivator for Chinese tourist going on holiday, it seems that travel for Chinese people to a large extent is an other-directed activity, meaning that travel is often more about painting a picture of who you are in front of others than self-realization. This knowledge is important for marketers who want to attract Chinese tourists because it indicates that the appearance or perceived value of a certain product or service might be as important as the actual product or service itself when dealing with Chinese tourists.

Chinese outbound tourism according to the literature

To sum up, this literature review indicates that a picture of ‘the typical Chinese tourist’ can be drawn and raises questions in relation to the Danish tourism sectors’ knowledge of and potential reaction to it, but at the same time it also raises questions in terms of whether this momentary picture of the Chinese tourist will also be relevant in the future. The review also shows that fast paced group holidays is the most common travel type for Chinese outbound tourists, yet it is argued that these fast paced tours are gradually being replaced by slow-paced, in-depth tours and independent travel in general. There is not agreement in the literature in terms of the importance of this shift, though, which raises interesting questions both in relation to whether this shift is actually happening and if it is, whether the Danish tourism sector know it and react to it. Lastly the review provides perspectives on the motivations and needs of Chinese outbound tourists, this discussion was framed using Pearce’s Travel Career Needs Model and I will therefore use this model to summarise the results of the literature review.



*Travel Career Needs Model (Modified)-
Chinese outbound tourists according to the literature*

The model above summarises the motivational needs of outbound Chinese tourists that I have found during this literature review. As mentioned in the theory section I have chosen to leave out the original division between self and other directed needs, because this division is not possi-

ble with a social constructivist approach. An example where I would have encountered this problem, had I chosen to use Pearce's division, is in the discussion of the self-esteem/development needs related to prestige/status. Here one could argue that prestige is self-directed, as it is an internal feeling, yet one could also argue that it is other-directed as it is a feeling which needs to be measured on other people in order to have any value. I will continue my evaluation of Pearce's model as I utilise it further in the following analysis.

WHAT MAKES A DESTINATION "CHINA READY"?

The goal of this chapter is to challenge and add to the perspectives presented in the literature review. In doing so, I will use the push and pull framework, as I analyse and discuss the perspectives of the 'Experts on Chinese Tourism' in relation to the results of the literature review. This analysis and discussion should lead to answers to the general question posed in the title of this chapter, yet this question entail three underlying questions: What characterises Chinese tourists? What motivates their travel decisions? And, how can a destination, in this case Denmark, attract Chinese travellers? In order to avoid repetition of points that I already made in the literature review, this analysis will only include subjects where the 'Experts on Chinese Tourism' disagree or present new angles to what is presented in the review.

As explained in the methodology the 'Experts on Chinese Tourism' include Researcher 1 (R1), Researcher 2 (R2), China Based Tour Operator (Tour Operator 1 – TO1) and Genuine China Tours (TO2). Transcriptions of the interviews can be found in Appendix 5.

The typical Chinese tourist... And the not so typical one..

The characterisation of the typical Chinese tourist in the literature review - a well educated man, between 25 and 45 years of age, who lives either on the east coast or in a big city and earns a relatively high income - generally fits well with the perspectives of the 'Experts on Chinese Tourism'. *"They are the ones who can afford it and also the ones who are interested in getting out."* (TO1). An important thing to consider in this relation is that *"If you would need to describe a typical Chinese tourist, you would need to describe the typical group-package tourist, because the number is still very huge – talking about leisure tourists it is about 80%"* (R2). Thus the description of a typical Chinese tourist is very often a description of a Chinese group-package tourist. This means that it is mainly the views of the group package tourists that are reflected in the literature as it often talks about Chinese tourists in general.

R2 argues that an important characteristic of Chinese group travellers is that they have very little travel experience, at least in Europe and therefore *"They want to see a lot of things, fulfil a lot of images they have in their minds. (...) So they travel I don't know how many thousand kilometres in ten days or something."* (R2). This means that some of the needs mentioned in the literature may change as the Chinese tourists become more experienced, and that some needs may not fit independent or in-depth travellers in the same way that they did group travellers.

In the literature review it was explained that there is a rising tendency toward more in-depth travel and independent travel among Chinese tourists, a tendency which three of the 'Experts on Chinese Tourism', in different ways, put a lot of emphasis on. The representative of T02 for example argues that the new generation who have been on the labour market in the last five to ten years are searching for something new. *"In many ways they feel separated from the earlier generation – culturally, historically (...) they will to a greater extent look for more romanticised travel, where is it not about seeing as much as possible in as little time as possible, but instead it is about being able to take something home from the trip."* (T02).

R2 agrees that there is a considerable group of tourists who wants to travel in another way than the traditional group tourists, but while the T02 representative makes the distinction between them about their generation, culture and history, R2 argues that the main difference is in their level of travel experience.

"I think that the travel experience is the one big difference. Because you cannot say that the FIT [Free Independent Tourists] tourists have more financial resources than group-package tourists, because there are a lot of group package tourists who have a lot of money. So I think that the key difference is travel experience, language experience and so on. They are more sophisticated you can say."
(R2)

R2 continues to argue that a positive thing in terms of attracting independent tourists is that their travel experience makes them very similar to other tourist groups in terms of their needs and therefore they do not demand as much special attention as group tourists do. None of the 'Experts on Chinese Tourism' have any numbers indicating how many in-depth or independent tourists there currently is, but R2 estimates that about 15 to

20% of the Chinese outbound leisure tourists are independent travellers.

So, although all the 'Experts on Chinese Tourism' argue that it is hard to talk about typical Chinese tourists because of the size of the country and the diversity of the people, it does seem that both the literature and the experts divide Chinese tourists into two main groups when talking about them - 'Group Package Tourists' (GPTs) and 'independent and/or in-depth tourists' (IITs). Through the following I will keep this division in mind and try to distinguish between whether the interviewees are talking about one group or the other and at the same time try to elaborate on the specific characteristics of the two groups.

Motivational Push Factors

I concluded the literature review with a version of Pearce's Travel Career Needs Model that showed the motivational needs of Chinese travellers according to the literature. In the following I will analyse and discuss these results in relation to the perspectives of the 'Experts on Chinese Tourism' in order to get other, more up-to-date and in-depth perspectives than the ones provided in the literature.

Important physiological needs

The physiological needs mentioned as most important in the literature are the 'need for Chinese food' and 'specific basic needs'. The 'Experts on Chinese Tourism' all agree that these 'basic physiological needs' are somewhat important, at least for GPTs. R2 for example argue: *"The Chinese group package tourists, who do not have any travel experience, they want to enter a destination, but still remain a little bit in China, so they want to have Chinese food or a Chinese channel at the hotel or a water boiler or something to prepare tea."* (R2). But R1 argues that while these needs are present and unique to Chinese tourists, they stem from a universal need. *"I think it will be the same as any other tourist in Europe (...) despite what many researchers say - that tourists go for the unique - that is only partly true. Tourists want to go and seek out what they are familiar with..."* (R1).

An example of a case where it seems that the need is not as unique to Chinese tourists as it presented in the literature is in relation to the 'need for Chinese food'. Here the T02 representative argues: *"They [the Chinese tourists] feel the same way as our foreign tourists in China feel. That it is fine with Chinese food but in the morning they like to have some bread and*

some juice and what you normally have.” (T02). This indicates that the literature might be putting too much emphasis on food related needs as a Chinese issue, when instead it might be regarded as a universal issue for people travelling to foreign cultures where the cuisine is considerably different.

The fact that the specific needs of Chinese tourists found in the literature come from more universal needs does of course not change the fact that the Chinese tourists have these specific needs. Yet, it indicates that many of the basic physiological needs of the Chinese tourists may come from a more common, higher motivational ‘need for familiarity’. This finding makes it relevant to include a new theoretical aspect as the dichotomy between familiarity and strangeness seem to have an important impact on the Chinese tourists coming to Denmark.

Familiarity and strangeness

Although anthropologists and sociologists first dealt with the subject it was Cohen who introduced the concept of familiarity and strangeness in a tourism context. He argues that the basis of all tourism is a generalised interest in things beyond ones particular habitat which leads to a situation where “... *strangeness and novelty are valued for their own sake.*” (Cohen 1972:165). Yet, he also argues that “... *not even modern man is completely ready to immerse himself wholly in an alien environment. (...) Most tourists seem to need something familiar around them, something to remind them of home*” (Ibid:166). Modern tourism can thus be explained as a balancing act between a level of strangeness and familiarity that fits the individual tourist or tourist segment.

Cohen argues that there are four main tourist typologies: The organised mass tourist, the individual mass tourist, the explorer and the drifter (Ibid:168), the first two being “*institutionalised forms of tourism*” and the two latter being “*noninstitutionalised forms of tourism*”. I will argue that these four typologies are not suitable for the characterisation of the familiarity-strangeness balance of the Chinese tourists investigated in this thesis, since there is for example no mention of in-depth travellers in these typologies. Instead I could have chosen another established set of typologies. Based on Cohen’s work Yiannakis & Gibson has for example made a familiarity-strangeness continuum of 13 tourism typologies or roles (Yiannakis & Gibson 1992:297), but it seems that these typologies, since one segment is as dominant as it is - 80% of the Chinese tourists

travel as GPTs – is too detailed to make sense when investigating Chinese tourists. Instead I find that the division between the GPTs on the one side and IITs on the other, which is quite similar to Cohen's division between institutionalised tourists and noninstitutionalised tourists, is the most fitting for its purpose in this thesis.

Looking at familiarity and strangeness in relation to these two groups there is a clear affiliation between GPTs and familiarity and IITs and strangeness, although one must be aware that each tourist has a different position on the continuum, meaning that one IIT tourist might want more familiarity and less strangeness than another. The fact that 'the need for familiarity' is mainly present with GPTs, also indicate that it is a need that might be less and less important as the Chinese travellers become more experienced. I will discuss the importance of familiarity and strangeness in relation to the division between GPTs and IITs further in the following analysis (pp. 89).

From a theoretical standpoint I will argue that the familiarity/strangeness continuum is very relevant when using Pearce's travel career needs model, as it seems that every level of the Pearce's model is affected by the individual tourists' proneness to either familiarity or strangeness. An example of this is that the importance of the mentioned physiological needs is different depending on whether the specific tourist or tourist segment is prone to familiarity or strangeness. This is not only the case for Chinese tourists and the combination of the familiarity/strangeness continuum and Pearce's model can thus be regarded as a general theoretical contribution. I will further outline this contribution in the end of this analysis.

In relation to the Chinese tourists there seems to be a strong connection between the 'need for familiarity' a 'need for security'. An explanation for this connection could, according to Schutz, be that the strangeness of a place and its people may cause an outsider to feel uneasy and even insecure (Schutz 1971:294).

Safety/security needs

In the literature review it was argued that the 'need for safety' of a destination is of great importance for Chinese tourists. The 'Experts on Chinese Tourism' agree that safety is of paramount importance, but while the literature mainly deals with the physical safety of a destination, the

'Experts on Chinese tourism' also mentions the psychological 'need for a feeling of security' as important and one of the main reasons why GPT is so popular. In addition to the 'the need for familiarity', R2 thus argues: *"The first time you travel to a country you want to be secure. We see a group package product like kind of a control, but they like that control, they like to have a travel guide speaking Chinese (...) They like the security, they like that they were guided by someone"* (R2).

In the literature review it was argued that physical safety could be an important motivator for Chinese tourists to visit Denmark as it is a relatively safe country. This analysis indicates that in order to motivate Chinese tourists in general, but GPT tourists in particular, to visit Denmark we may also need to focus on the psychological feeling of security, a feeling that seemingly can be created through fulfilment of different needs related to the 'need for familiarity'.

Cultural Needs

The literature review indicated that cultural issues were among the most important relationship needs of the Chinese tourists when going traveling. Among the 'Experts on Chinese Tourism' there is general agreement that cultural issues play a role, but it is also argued that *"They [the cultural aspects] are becoming less important as the Chinese are becoming more and more western. Of course you are still influenced by it, but the focus is not as strong on it as it has been."* (T01). Generally the 'Experts on Chinese Tourism' ascribe much less importance to the cultural issues than the literature – especially the *face* concept, which plays an important role in the literature, is considered to be of much less importance than the literature indicated. It is argued that cultural concepts such as *face* are often used to explain things that could also be explained with other, more universal reasons. When asked about the importance of the *face* concept R1 for example replies *"... tourism activities are situated in a particular social context and Chinese will behave in a certain way, they will try to understand that things are different. But what is important, like anywhere else, is that you have to treat them politely, just like people should treat Europeans politely..."* (R1). In this example 'the need to save face' could according to R1 instead be explained with a much more basic and universal 'need to be treated politely'.

One place where some of the 'Experts on Chinese Tourism' agree with the literature is that the Chinese can get *face* by visiting: *"... the must-see*

places such as Rome, Paris, Barcelona those places that you have to have visited in order to be regarded as a well versed Chinese city dweller. (...) The face comes from having tried something that the others haven't tried, trying something new, something different." (T01). Yet the T01 representative also argues that this need can be regarded as a "...very basic human need." (T01) R2 agrees with this notion as he argues "... if you go to China the first time you also want to visit The Great Wall, you also want to visit the highlights." (R2). But although this comparison might be true, there are also indications in the literature review as well as in the expert interviews that the choice of going to all these destinations is bound to a 'need for prestige' more than anything else.

The Need for Prestige/status

The self-esteem/development need for prestige is thus very important among Chinese tourists. Yet, it seems that there are different comprehensions of what is prestigious among Chinese tourists. As mentioned earlier the Chinese tourists can be separated into two groups - GPTs and IITs. According to the 'Experts on Chinese Tourism' there are major differences in terms of what is perceived to be prestigious depending on which group you look at.

The perspective of the 'Experts on Chinese Tourism' in relation to the GPTs perception of prestige fit very well with the explanation provided in the literature review - they want to visit as many destinations as possible *"That is something that gives prestige, they can say "hey, I travelled to eight countries in Europe"* (R2), I saw the most famous attractions and bought the most expensive souvenirs.

For the IITs, prestige is, according to the 'Experts on Chinese Tourism', something completely different. *"Things that are simply different from their daily lives (...) it is the special experiences, the hobby based experiences that they want to show off."* (T01). In addition to this, although shopping is still perceived to be important among IITs, it is argued that it is not as important as it is for the GPTs. The T01 representative argue that among IITs shopping *"... is not what keeps the tour running, not from the feedback that we see, that's safety, the experience, whether things work and freedom of movement. Those are the things that they really need because they are so locked in their daily lives."* (T01). R2 argue that one of the main reasons for the extensive shopping is that they are first time travellers *"... FIT [Free Independent Tourists] tourists do not shop as much as group package tour-*

ists, group package tourists shop a lot because they think that it is the first time and perhaps the last time - going to Europe is something that special - so they spend a lot of money because they are thinking "perhaps I won't come back"." (R2). This provides an explanation to the difference in shopping habits between GPTs and IITs, but also indicates that shopping will be less important as the Chinese become more experienced travellers.

What motivates the travel decisions of Chinese tourists?

The perspectives of the 'Experts on Chinese Tourism' mostly confirm the results of the literature review presented in the model on page 62 and therefore I will argue that this model is still valid as a picture of the main travel motivations of Chinese outbound tourists. Yet, this discussion has indicated that two new needs could be added to the model. First, it could be argued that many of the physiological needs as well as for example language needs could be categories under a higher 'need for familiarity'. Second, a 'need for a feeling of security', which is more connected to the 'need for familiarity' than the 'need for safety', could be added to the safety needs category.

In addition to this the analysis of the push factors has shown that there are important aspects that one should be aware of when looking at this motivation needs model and at the literature in general. The literature for example often use cultural differences as the main reason for particular actions of Chinese tourists and in turn emphasise cultural needs as one of the most important travel motivators. Yet, this analysis indicates that the reasons for these actions are rarely exclusive to the Chinese culture and hence, that too much emphasis often is put on cultural needs as a main motivator. Another important conclusion from the push factor analysis is that the literature, because it treats Chinese tourists as one group, too often base its conclusions exclusively on the motivational needs of GPT tourists – as this is the biggest segment. This analysis has for example shown that there are major differences in the perception of what is prestigious depending on whether one is dealing with a GPT or a IIT and, in addition, that the difference between these groups is often dependent on travel experience.

Pull factors

In the following I will continue my discussion of the views of the 'Experts on Chinese Tourism' in relation to the literature. Here I will look into the pull factors in order to determine whether Denmark can be regarded as a potential travel destination for Chinese travellers and if so, how this potential according to the 'Experts on Chinese Tourism' can be exploited. In this section of the analysis it is particularly important to be aware of the fact that two of the 'Experts on Chinese Tourism' are tour operators and, as argued in the methodology section, may therefore be biased toward certain viewpoints.

The attractiveness of Denmark

When looking at the pull factors when Chinese travellers choose a destination the distinction between GPTs and IITs, again, becomes visible. There are, though, certain points that the 'Experts on Chinese Tourism' argue are common for the two groups. They for example all agree that when Chinese tourists travel long haul, they mainly visit the classic destinations such as France, Italy and England, which is of course not a good thing from a Danish perspective. Yet, there are also examples of pull factors of Denmark that fit well with the needs of both GPTs and IITs. It is for example argued that the Chinese tourists try to avoid too poor countries. This is connected to the mentioned need for safety, but is also related to the fact that the Chinese tourists, as argued in the literature review, see unpollutedness and cleanliness as an attraction. The T01 representative says *"They want places with few people, that are clean and again, they want the feeling of safety and comfort."* (T01). Although these pull factors fit well with the needs of the Chinese tourists they seem too broad to make Denmark stand out as a destination. R1 argues that *"... the biggest challenge for Denmark is that it is not (...) in the mind of the Chinese when they go travelling."* (R1). He continues to argue that in order to stand out the destination needs to be iconic *"... tourist don't know much about other countries they only have an image (...) How much do we really know about New York? So if Denmark can become iconic, that will be helpful..."* (R1). This is backed by R2 who argue that one thing that the GPTs and IITs have in common is *"... that they both want to fulfil the image they have about the destination."* (R2).

On the other hand it is also argued, that another way to pull tourists to Denmark is by offering in-depth experiences as Denmark is not able to

deliver as an iconic destination anyway, the T02 representative argues *"This doesn't sound nice and now I am speaking bluntly, but we don't have any sights in Denmark that are really big, very old or extremely impressing in that sense. (...) That is not what we should go for, we need to emphasise that we can give them a different experience"* (T02).

Iconic vs. in-depth

Based on the above it seems that there is a dichotomy in terms of how Denmark should pull the Chinese tourists. On one hand it is argued that Denmark should be promoted as an iconic destination and on the other that it should be promoted as a place for in-depth experiences.

Denmark as an iconic destination

If Denmark wants to attract tourists by being iconic, one of the most important things is, according to the 'Experts on Chinese Tourism', that *"... they [the Chinese tourists] have certain preconceptions of the country (...), they are familiar with certain parts of Denmark, and those things can be used to promote the country..."* (R1). The Chinese tourists general preconceptions of Denmark are according to the 'Experts on Chinese Tourism' for example the before mentioned cleanliness and safety of the country. But while these are very broad and general things, the most iconic pull factors are according to all the 'Experts on Chinese Tourism' The Little Mermaid, H.C. Andersen and Copenhagen. *"The Little Mermaid is for example an image that you can sell to the Chinese, because it is something special - there is a history about it. That is something they are curious about, this small history of something romantic..."* (R2). Yet, although all the 'Experts on Chinese Tourism' agree that these are the important icons, especially the T01 and T02 representatives argue that there are problems in promoting only these iconic images: *"There is the H.C Andersen feeling, but I think we should be careful when promoting it because they get disappointed when they come to Odense and they get disappointed when they go to Lange Linie [The location of The Little Mermaid], so it's a bit of a gamble..."* (T01). He continues to argue that although these iconic images does attract tourists to Denmark, they only stay for one night and they might not get an experience that they will take home as something positive. The T02 representative supports this notion as he argues that it is a problem that Denmark promotes itself in a way where *"...the only thing the Chinese know about Denmark is still the little mermaid and that "H.C. Andersen maybe lived in that country"..."* (T01). Thus they argue that Denmark should instead promote more in-depth experiences.

Denmark as a destination for in-depth experiences

The thoughts behind pulling Chinese tourists to Denmark for in-depth experiences is, according to T01, T02 and R2 based on the Chinese tourists need to try something new, which was also presented in the literature review. The most significant characteristic about this way of pulling tourists is that while marketing Denmark as an icon potentially can attract both GPTs and IITs, marketing Denmark as a destination for in-depth experiences puts a strong focus on the strangeness part of the familiarity-strangeness continuum, which potentially can exclude the huge group of GPTs. Yet, the T02 representative, who is the most positive toward IIT among the 'Experts on Chinese Tourism' argue that

"... there are luckily a lot of Chinese, so we don't necessarily have to steal them from Paris, we can just take 10mio from the Hunan Province and bring them to Denmark. It does not need to be a battle where we have to steal tourists from other countries, we can just make sure that Denmark is on offer and (...) then we can take the ones that don't want to go to France or Italy and make them go to Denmark instead."
(T02)

Three of the four 'Experts on Chinese Tourism' also argue that this way of pulling Chinese tourists, although still new, is already being used in other European countries. *"The German Tourism Board is already promoting it very strongly."* (R2). R2 continues to argue that a problem in IIT tourism today is that *"... the offer within the product is still behind the demand, so there are a lot of tourists who want to travel differently, but can't."* (R2) - since there are not enough operators who offer this type of product. This problem could, however, also be seen as an opportunity since it indicates that there is an unfulfilled demand for IIT tourism among Chinese tourists.

T01 and T02 argue that in order to tap into this market it is necessary that the Danish tourism sector promotes other aspects of Denmark than Copenhagen exclusively and also expand Copenhagen to be more than just The Little Mermaid and something related to H.C Andersen. *"... we should tell the Chinese that we also have Skagen, the archipelago of southern Funen, Gudenåen, Bornholm and 117 other destinations that the Chinese would get an enormous joy from, but they don't realise even exists."* (T02). Yet, there is disagreement between the two tour operators as T01 argues that it will *"... never be more than three days, perhaps four."* (T01) that we

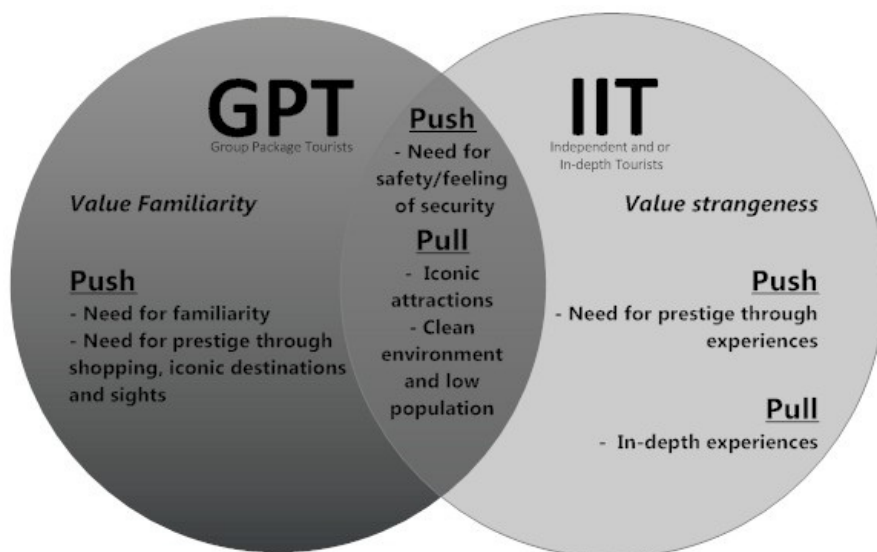
can make them stay and that “... you would not be able to make a Chinese person stay in Denmark alone, it has to be combined with something else.” (T01), while the T02 representative is more optimistic in terms of how long you can keep a Chinese tourist in Denmark.

How can Denmark attract Chinese travellers?

The ‘Experts on Chinese Tourism’ - like the literature - argue that pull factors such as clean environment, safety and low population are important for Chinese tourists and add that these are all factors that can be connected to Denmark as a destination. Yet, it is also argued that these factors are not enough to draw the Chinese tourists, especially because these factors also fit with numerous other destinations and because Denmark is not naturally in the mind of Chinese travellers. Thus other pull factors are needed if Denmark wants to attract Chinese tourists. For this purpose two opposing approaches was presented by the ‘Experts on Chinese Tourism’ - marketing Denmark as an iconic destination and marketing Denmark as a place for in-depth experiences. I will discuss the relation between these two approaches further in ‘Strategies and visions of the Danish Tourism Sector’ (pp. 111), where I will also analyse and discuss the strategic approaches of the Danish tourism sector representatives in relation to this.

So... What makes a destination “China Ready”?

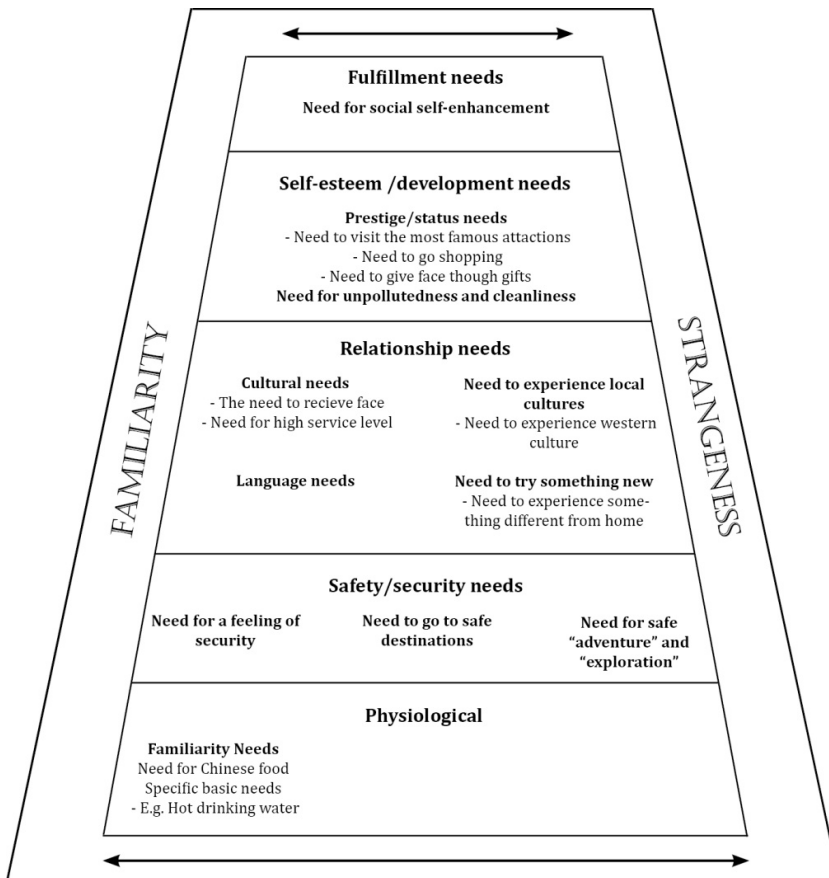
This analysis shows that there are a number of important push and pull factors that the tourism sectors and destination DMOs in particular, must be aware of and react to if they want to make their destination “China Ready”. The analysis also showed that before considering these factors, one must recognise that “China readiness” is very different depending on whether one wants to attract GPTs who value familiarity, IITs, who value strangeness or both.



This model sums up the new perspectives that were brought forward in this analysis. It mainly illustrates the push and pull factors that are important to respectively GPTs and IITs and the ones that are common for both of them. These factors include the ‘need for familiarity’, which is a higher motivational need that include lower needs such as needs for specific amenities and needs related to food, language etc. Although the ‘need for familiarity’ is mainly present with GPTs, it was argued that fulfilling this need can act as an important part in providing a feeling of security, which is a need that is important for GPTs as well as IITs. The analysis has also shown that there are a number of general pull factors relating to Denmark that help make the country “China Ready” – clean environment, low population etc. - yet these general factors are not enough to draw the Chinese tourists on their own. Therefore the Danish tourism sector has to market the country either on its iconic attractions, which can attract both GPTs and IITs, but cannot satisfy IITs on their own or on in-depth experiences which are only satisfying to the IITs. I will discuss this relation further in ‘Strategies and visions of the Danish Tourism Sector’ (pp. 111).

As mentioned, an important finding of this analysis was the GPTs ‘need for familiarity’. Based on this finding theory on familiarity and strangeness was included to further investigate the importance of familiarity and now also strangeness in relation to Chinese tourists - a discussion which will

be continued in the following chapters of this thesis. Yet, this discussion has pointed to a theoretical contribution to the study of tourism motivation in general, as it suggests that the familiarity/strangeness continuum can strengthen Pearce's travel career needs model, since this continuum adds an important differentiating factor to the model. In its original form the model presents a number of different motivational needs that are important to a certain tourist segment, yet it does not consider that the importance of these needs might be different depending on whether the specific tourist is prone to familiarity or strangeness. With this in mind I have added the familiarity/strangeness aspect to the already modified Pearce model which was presented in the conclusion of the literature review.



*Travel Career Needs Model with Familiarity/strangeness -
Chinese outbound tourists according to the literature*

In this model the needs are positioned so the needs that are most related to familiarity are placed in the left side, the ones closest to strangeness are in the right side and the ones that are related to both are in the middle. I have done this to illustrate that some of these needs have a stronger connection to one side than others, but as the arrows illustrate, it is important to mention that it is a flexible continuum where some needs might change with time or be positioned differently depending on whom one is investigating. I will argue that this model does not only work with the Chinese outbound tourist that I investigate in this thesis, but, as mentioned, can be regarded as a contribution to tourism motivation research in general.

INCOMING CHINESE TOURISM



What is the Danish tourism sector's understanding of incoming Chinese tourism?

SWOT ANALYSIS FRAMEWORK

So far the subjects that I have dealt with have been based on the literature on Chinese outbound tourism. In order to make sure that it is not only the points brought forward in the literature that I deal with in this thesis I will use an alternative structural analysis framework for the following analyses than the literature-based framework that I have used so far. I have chosen SWOT analysis as the basis for this framework - a framework which will be utilised as a tool to categorise, organise and compare the Danish tourism sector representatives' perspectives on and understanding of incoming Chinese tourism. In the following I will give an overview of what SWOT analysis is, how it will be utilised in this thesis and the reason that I have chosen this framework.

SWOT analysis

SWOT analysis is a very popular method for analysing and facilitating strategic marketing and management. (Weaver & Lawton 2010:194). SWOT stands for strengths, weaknesses, opportunities and threats, and a SWOT analysis hence traditionally includes an external analysis of the opportunities and threats created by the environment, as well as an internal analysis of the strengths and weaknesses of the company (Kotler et al. 2006:92). Weihrich who was one of the earlier researchers that dealt with SWOT defines it as “... a conceptual framework for a systematic analysis that facilitates matching the external threats and opportunities with the internal weaknesses and strengths of the organisation” (Weihrich 1982:9). As mentioned, in this thesis SWOT will be utilised as a structural tool to analyse incoming Chinese tourism and not a specific organisation. Because of this, the division between external and internal will not play an important role in the following analysis, yet the understanding that *strengths* and *weaknesses* are current things that can be affected with direct consequences, while *opportunities* and *threats* can only be affected more indirectly is still valid.

The true origin of the SWOT concept is to this day unknown, since no definitive publication explaining and/or claiming the concept is in existence. Some researchers argue that the concept was used at Harvard Business

School in the 1960s, where Albert Humphry's Team Action Model is supposed to be the predecessor to the SWOT model. However, no publications relating to SWOT were ever accredited to him (King R.K. 2004:2).

King argues that in spite of its uncertain origin, SWOT Analysis is used for many purposes and applied to diverse units of analysis. He mentions the following main uses of SWOT analysis:

- *"providing situation analysis of an organization, enterprise, community, region, country, product, service, process, family, team, person, brand, project, or task"*
- *providing background information for developing mission and vision statements as well as setting objectives and making strategic decision*
- *identifying opportunities, resources, constraints, and strategic options*
- *developing an awareness of, learning about, and gaining insights into a system's position: strengths; weaknesses; opportunities; threats*
- *developing a "bottom-top"/"top-bottom" shared vision for an organization*
- *providing input for the development of scenarios and strategic plans."*

(Ibid)

Looking at this there is no doubt that SWOT analysis has many uses and that some of them, as I will explain later, are also very relevant in this thesis. Yet, although SWOT analysis is a popular and, according to Weaver & Lawton, proven analysis method (Weaver & Lawton 2010:194) several researchers also criticize the method and claims that it has a number of weaknesses.

Weaknesses in SWOT analysis

In their article "SWOT Analysis: It's Time for a Product Recall" Hill & Westbrook provide a well argued criticism of SWOT analysis. They argue that the popularity of SWOT has become a curse, as modern textbooks on strategy still feel obliged to include SWOT, even if they have reservations about its application (Hill & Westbrook 1997:47).

They continue to list the following weaknesses in the nature of the method:

- *The length of the lists.*
- *No requirement to prioritize or weight the factors identified.*
- *Unclear and ambiguous words and phrases.*
- *No resolution of conflicts (as with the example given in the preceding paragraph).*
- *No obligation to verify statements and opinions with data or analyses.*
- *Single level of analysis is all that is required.*
- *No logical link with an implementation phase.*

(Ibid:51)

Many researchers agree with these weaknesses, however Koch “... contends that most criticisms of SWOT Analysis deal with its poor and inappropriate uses rather than inherent weaknesses of the method.” (Koch 2000 in King R.K. 2004:2) and even Hill & Westbrook agree that many proponents of SWOT “... do not see it as mere list making.” (Hill & Westbrook 1997:47).

A weakness that I see as very important in the utilisation of the SWOT framework is the danger that there is no clear understanding of what the four SWOT categories mean, within the specific work context. In order to avoid this problem and make sure that the reader has the same understanding of the categories in the context of this thesis as the researcher does, the meaning of the four concepts will be outlined below.

Strengths	Things that are currently regarded as positive merits of incoming Chinese tourism by the Danish tourism sector - can be affected directly with short term consequences.
Weaknesses	Things that are currently regarded as weaknesses of incoming Chinese tourism by the Danish tourism sector – are relatively easy to change (compared to threats), can be affected directly with short term consequences.
Opportunities	Future potential in Chinese incoming tourism according to the Danish tourism sector. There is no guarantee that these things will come true, but currently they help paint a positive picture of incoming Chinese tourism – can be affected but the consequences are long term.
Threats	Things that, according to the Danish tourism industry, might threaten Chinese incoming tourism to Denmark in general – are very hard to change (compared to weaknesses) can only be affected in the long term.

Applying SWOT analysis

Although I agree with the many criticisms of SWOT analysis I will argue that Koch's point, that the problem is in the utilisation and not in the theory, is true and I will argue that the way in which the theory will be utilised in this thesis avoids a lot of the mentioned issues.

In this thesis the SWOT Analysis framework will be utilised as a structuring tool for the information that the representatives of the Danish tourism sector provide in the interviews. This means that the theory is utilised more as a categorisation tool that allows for an explorative approach, than as a tool that itself implies that some issues are more important than others. The theory is thus used to organise, discuss and analyse the Danish tourism sector representatives' understandings of incoming Chinese tourism and their relations on their own merits; relatively unaffected by perspectives from the literature, although my own and the interviewees pre-knowledge and social constructions unavoidably still play a role.

This way I can explore the understandings of the Danish tourism sector representatives relatively unaffected by the literature in order to bring forward points that otherwise might have been ignored, before I include the perspectives from the literature based analysis 'What Makes a Destination "China ready"?', in order to discuss these perspectives as well.

UNDERSTANDINGS OF INCOMING CHINESE TOURISM

In the following I will present, analyse and discuss the Danish tourism sector representatives' understandings of incoming Chinese tourism to Denmark. As mentioned the SWOT framework will work as the organising frame for this analysis and the understandings of the representatives will therefore be categorised within the four SWOT categories. The analysis will include the understandings all the interviewed Danish tourism sector representatives, these include Brøchner Hotels (Hotel 1 - H1), Hilton Hotel Copenhagen (H2), Grand Hotel (H3), Crown Plaza Hotel (H4), Copenhagen Star Hotel (H5), Visit Carlsberg (Attraction 1 - A1), The Royal Danish Collections (A2), Odense City Museums (A3), Visit Denmark (Destination Marketing Organisation 1 - DM01), Wonderful Copenhagen (DM02), Scandinavian Airlines (Airline Carrier - AC) and Kuoni Destination Management (Incoming Bureau - IB). A list of all abbreviations used in the thesis can be found in Appendix 1 and transcriptions of the interviews can be found in Appendix 5. Perspectives from the literature review as well as the earlier analysis 'What makes a destination "China Ready"' will be included in this analysis and discussion when relevant.

Strengths

Denmark has something to offer

As I will explain further in 'Threats' (pp. 98) Denmark or even Scandinavia cannot be considered a primary destination for Chinese tourists. Yet, a strength when trying to attract Chinese tourists to Denmark is, according to the representatives, that Denmark does have something to offer the Chinese and that the Chinese, according to most of the sector representatives, will appreciate what Denmark can offer. Some of them argue that The Little Mermaid and H.C. Andersen in particular, are things that draw the Chinese tourists. The A3 representative for example argues that "*H. C. Andersen is more famous than Denmark. If you ask a Chinese person where Denmark is, they have no idea, but if you ask them whether they know H.C. Andersen they will say "yes!" and start telling one of the stories.*" (A3). While

this notion is probably true some of the other representatives argue that it is a feeling that one should promote rather than specific sights. *"It is the unique things that they come here to see. We don't have the famous beaches, we don't have a city that differs greatly from other European cities, so besides from a few things like Tivoli, we don't really have any big extraordinary things, but we have a unique culture and we can show that* (H5). The AC representative agrees with this as he argues *"... we should be more focussed on the other things that we can offer – cleanliness, fresh air, logistics"* (AC).

The argument that Denmark has some famous landmarks that the Chinese know about and are interested in, fits well with the pull factors presented in the previous analysis, where it was also argued that Denmark has some iconic elements. Yet, like it was argued in that analysis, the representatives of the Danish tourism sector also argue that Denmark might not have enough of these iconic sights to please the Chinese tourists for a longer period of time, which suggests that it might be necessary to promote the less tangible aspects of Denmark as a tourism destination. I will discuss the strategies of the Danish tourism sector in terms of marketing Denmark as an iconic destination or a place with a unique feeling further in 'Strategies and Visions of the Danish tourism Sector' (pp. 111).

They have money to spend

An interesting contradiction in the understandings of the Danish tourism representatives is that they argue that the Chinese spend a lot of money while travelling, but at the same time that they don't spend a lot of money on hotels, food and attractions. The explanation for this contradiction seems to be that, especially GPTs do not spend much money on accommodation, food or sights, but they do spend a lot on shopping.

Shopping

The understanding among the sector representatives is clearly that a strength in Chinese incoming tourism is their high shopping expenditures. Both the DMO representatives for example argue that *"... what is especially exiting about them [Chinese tourists] is that, although they may not take up a lot of space in the number of nights stayed, they really take up a lot when it comes to shopping."* (DMO1). But although shopping might be an important strength in Chinese tourism, some of the Danish tourism sector representatives agree with the 'Experts on Chinese Tourism' who argued that although shopping is important, the 'shopping need' it is not

a main travel motivation for the Chinese tourists, especially when attracting Chinese tourists to Denmark. The AC representative argues “... we must not think that all of them run to Strøget to buy Flora Danica and Georg Jensen, they would probably rather go to Paris and buy Louis Vitton or to Milano to buy something fancy there. (AC).

Based on this it can be argued that, while high shopping expenditures is an important quality of Chinese tourists coming to Denmark and something that the Chinese tourists demand and Denmark should therefore exploit, it may not be something that can be used to attract Chinese tourists to Denmark or to market Denmark as a unique travel destination. Another argument in this relation is that the reason that the Chinese tourists don't spend a lot of accommodation, food and attractions, might be more connected to them being GPTs than them being Chinese, I will explore this argument further in 'Weaknesses'.

They are relatively easy to satisfy

As I will also discuss in 'Weaknesses', the sector representatives mention a number of special demands that the Chinese tourists have. But many of the representatives also mention that a strength of the Chinese tourists is that, although they may have some special demands, they are actually quite easy to satisfy. “I don't think they are that hard to satisfy actually.” (H1) “. “The good part is that they are. Almost all the groups are very satisfied when you talk to them – if we give them the Chinese food and so on...” (IB). The claim that Chinese tourists are relatively easy to satisfy is not in line with the literature where it is often argued that Chinese tourists have an array of special needs and demands that are hard to satisfy, but as argued in the analysis of the perspectives of the 'Experts on Chinese Tourism' the importance of some of these demands may often be exaggerated or based on the wrong reasons in the literature.

They are GPTs

There is no doubt that GPT is the dominating travel type for Chinese tourists going to Denmark, at least among the companies represented in this thesis. The question is, however, whether this is an advantage. There are different opinions on this depending on which representative you ask. Some argue that the dominance of GPTs is a strength, others that it is a weakness, but most of them argue that it is a combination. The DM02 representative for example argues “I think that it is both an advantage and a disadvantage, because it can often be hard to handle such a big group, on

the opposite they book in good time so it's easier to organise.”(DM02). On the positive side mainly arguments related to the ease of organisation are mentioned. “... the bigger load a tourist guide can take, the easier for us. (...) we know exactly when they come down for breakfast, when they need to leave with the bus and so on, which makes it easy to organise things.” (H3). There are thus some advantages in the fact that most of the Chinese tourists come as GPTs but, as I will explain further in the following, many of the weaknesses that the Danish tourism sector representatives mention in relation to incoming Chinese tourism, could be connected to the fact that they travel this way.

Weaknesses

They don't stay for long

Maybe the most important weakness mentioned by the representatives, and also supported by the ‘Experts on Chinese tourism’ is that the Chinese tourists only stay for one or two nights when they come to Denmark. The main reason for this is according to almost all the representatives that they come to Denmark, or rather to Copenhagen, as part of a group tour in Scandinavia and that these tours don't leave time for further exploration of the city or country. The A2 representative describes it this way “... *it is monument tourism, 4-Square tourism ‘I need to tick this off on my way.’*” (A2). Although all the representatives of the Danish tourism sector agree that it is a problem that the Chinese tourists only stay for such a short time, they have different understandings in terms of how this problem can be solved or whether it is possible to solve at all.

Most of the representatives thus argue that the reason that the Chinese GPTs travel this way is a natural part of the tourism evolution “... *in the beginning its mainly about getting out and getting notches in the belt: ‘How many countries have I seen? I need to see the most popular places that I have heard about – Paris, Rome and so on.’*” (H1), suggesting that the only solution to the problem is to wait for the Chinese tourists to mature. Yet, other reasons for the short stays are also mentioned by some of the representatives. The IB representative for example explains that “... *there is no new programmes coming out, they are keeping the programmes that they did for 20 years.*” (IB). While the H4 representative argue “*I think that is what they want, but it is also what they have always had. (...) I had meetings with some tour operators out there [In China] – when you look*

at what they had put together, it was not that creative, it was what you have always done. And that is where we should inspire them to find some other solutions.” (H4). It is thus argued that the one of the reasons that the Chinese GPTs and GPT operators choose the traditional tours is because they don't know that there are other possibilities. If this is correct, the problem changes from being strictly a question of the lacking maturity of the Chinese travellers to being a question of how Denmark markets itself in China and is thus a question of the strategies applied by the Danish tourism sector. I will discuss these strategies further in 'Strategies and visions of the Danish Tourism Sector' (pp. 111).

They don't spend a lot

As mentioned earlier many of the Danish tourism sector representatives argue that another weakness of Chinese tourists or at least of Chinese GPTs, is that although they spend a lot of money shopping, they often choose cheap solutions when it comes to other things.

“I don't know about the individual Chinese, but at least the tour operators save some money on accommodation. They don't stay at the best hotels (...) They also often like to save on food (...) Attractions are not something they spent a lot of money on either.”
(DM01).

According to the interviews a number of different factors seem to have an effect on this. First, it is argued that the many middlemen who are involved in making a GPT tour raises the price for the consumer and lowers the income for the hotels, attractions etc. *“... it always ends with a very low price and I am sure that the price that the end-user pays is relatively high.”* (H3). Second, the low prices could be connected to the issue mentioned above – that all the tours are very similar - as this creates heavy competition when selling the trips in China. The IB representative argues *“... they are following the same pattern. So if everyone takes the DFDS from Copenhagen to Oslo (...) then they [The Chinese travel agencies] just lower the prices.”* (IB). Third, it is argued that their lack of spending like a lot of the other weaknesses is connected to the immaturity of the Chinese tourists in terms of travel experience *“... at the moment they are prioritizing other things than quality, because it is an immature market and because they are immature travellers.”* (H1).

Based on the first two arguments one could contend that a way to get more money from Chinese tourists would be either to make more specialised tours that could be sold as more exclusive products, thereby appealing to the Chinese 'need for prestige', which was presented earlier, or not going for GPTs at all together, since it seems that it is the tour operators who force the low prices. This is of course easier said than done with 80% of the Chinese tourists being GPTs, but if the large potential in terms of sheer numbers - which I will discuss further in 'Opportunities' (Page 96) - come true, one could argue that catering to IITs instead of GPTs might be a solution to this problem. This is connected to the third argument, since the maturity of the travellers seems to be closely intertwined with their choice of travel type. I will continue the discussion of IITs vs. GPTs in 'Strategies and visions of the Danish Tourism Sector' (page 111).

They have familiarity related needs

The Chinese tourists' food and language related needs receive a lot of attention from the Danish tourism sector representatives. This correlates well with the literature and the analysis so far, where the 'need for Chinese food' and 'language needs' was mentioned as important parts of the 'need for familiarity'. But while many of the representatives mention these needs as a weakness of the Chinese tourists, many of them also argue that these needs - even for the familiarity dependent GPTs - are not as big as some may think.

In relation to food, although some argue that *"... they are eating Chinese food. They are not into the local food at all and it needs to be Chinese people running the restaurant."* (IB) the AC representative for example says *"... obviously there are some challenges in terms of food and such - it is not all Chinese people who like meatballs and mashed potatoes, they like to have their noodles. But these are small things and not big challenges."* (AC). And in relation to language they mention that IITs are often good enough at English to make it a nonfactor *"... many of the Chinese who travel actually know English - they learn it very fast in China at the moment."* (A3), while GPTs always come with an English speaking guide *"Obviously there is the language challenge, but they typically have a guide, who speaks English, so that is not a problem."* (H3).

It generally seems that it is not regarded as a big issue, and that catering to these needs should be considered a courtesy rather than fulfilling a need *"... we can make Chinese breakfast if they want it and have it in the*

buffet (...) but they [The tour operators] have not asked for that, they [The Chinese] would like to try Nordic food when they are here..." (H4). With that said, it can be argued that although the 'need for Chinese food' and more general 'need for familiarity' might not attract Chinese tourists to the degree mentioned in the literature, providing these courtesies could create good evaluations from the tourists who are already visiting and thereby a competitive advantage in the long run.

Culturally grounded issues

Some of the representatives also mention different cultural issues when dealing with Chinese tourists, but generally it seems that the representatives agree with the 'Experts on Chinese Tourism', who argued that these issues are only in a few cases unique to Chinese tourists. *"In the hotel business we are used to flight crews where there are a lot of cultural issues and hierarchies and so on. (...) the hotel industry should be ready for everyone."* (H3). Many of the representatives also argue that the cultural issues related to Chinese tourists in particular are very limited, the AC representative says *"They know that they are travelling under certain conditions, that they are no longer in China and it is not everyone who speak Chinese and that it is not a good idea to spit on the marble floor in the National Museum, they know this."* (AC). The most unique complaint that some of the representatives have specifically about the Chinese guests, is that they rarely get any complaints from them. *"If they complain, then they wait until after their stay and then it is too late, which is a shame because we would like to help them, but that is their mentality."* (H1) *"... one of the negative things – we never get any complaints or hear anything from them. But I don't believe that not at least one person has gotten a room that he or she does not like or something like that."* (H3). This problem could be grounded in the 'need to save face', which was mentioned in the literature, but while this is an important problem, it is the only problem mentioned by the representatives that could be related to cultural concepts such as face, which indicates that the point made in the previous analysis – that the importance of cultural issues might often be somewhat overstated in the literature - is probably correct.

There is not a lot of them

One of the most important weaknesses in relation to Chinese incoming tourism, mentioned by the Danish tourism sector representatives, is that Chinese tourists are still only a very small tourist group in Denmark. This means that although all the representatives consider Chinese tourism as

something important it is not considered a “... *bread and butter market...*” (DM02). Hence, one could ask why the Danish tourism sector representatives even care about the Chinese market. The answer to this question is in its potential, which I will look further into in the following.

Opportunities

Great potential

As mentioned all the Danish tourism sector representatives one way or another express interest in Chinese incoming tourism based on its potential. Even H1 - who at one point argue that Chinese tourists are not currently interesting to their hotel, since the boutique hotel product which they supply is not yet interesting to Chinese tourists - say “*Just because of its size as a market, the Chinese market is extremely interesting. Not much has to happen before we are looking at a volume that is really big.*” (H1). In addition to this the representatives mention the opening of new flight routes as well as softening on travel restrictions for the Chinese as important factors, when arguing for the potential in incoming Chinese tourism. “... *travel restrictions are softened and travel possibilities rise – you can travel individually and so on. There will be more tourists, and they will also come to Denmark.*” (AC).

Aside from the potential in the size of the market, the growth that has already happened and is currently happening in Scandinavia and Denmark – Copenhagen in particular - is also convincing the representatives that the market could be interesting. The H4 representative for example mention studies made by Visit Denmark and tourist bureaus along with their own experiences as proof of the growth and a main reason for their interest. “*We also look at how many Chinese guests we have had until now – does it make sense to focus on it and invest in it? Yes it does! Since I have been here I can also see that there has been growth, so it has made a difference.*” (H4). Finally another reason why the representatives are interested in the Chinese market despite its current low numbers is that the market is rising in spite of the fact that “... *the Chinese are not a part of the travel types that are in growth in Copenhagen. (...) we are actually declining a bit on the traditional travel types. And the Chinese are only in the traditional group, but they are still increasing.*” (A1).

The importance of timing

At least among the representatives in this thesis there is thus a common interest in Chinese incoming tourism to Denmark because of its potential. It is agreed that it is a market that one should keep an eye on “... *we need to be very aware of what is happening in China, how is it developing, so that we can jump on when it becomes interesting.*” (H1). Yet, there are differing opinions among the representatives in terms of when the right time is and what needs to be done in order to take advantage of the potential. There seems to be three different approaches among the representatives – a passive approach, a pending approach and an active approach.

The companies that adhere to the passive approach believe that the Chinese tourists will come by themselves and that they should do nothing special toward the Chinese tourists specifically “... *apart from having brochures in Chinese, I don't really think that you should do anything special.*” (H5). The ones with the active approach try to be proactive as they believe that now is the time to act if one wants get a piece of the action “... *the timing is also important. You have to be at the right place at the right time.*” (H4). “... *it might be a couple of years before we see the results, but if we are not there now, then we will be overlooked.*” (A3). The companies that have the pending approach agrees that one should be active in attracting the tourists, but they argue that now is not yet the time to act.

“We are very focussed and really keep an eye on things (...) When is the right time for us to jump on? So we do it the right way. I think that it is very important to do so, because I also think that there are many hotels and others who have experienced in the beginning: “The Chinese are coming!!” (...) and many went on that bandwagon but did not get the volume or the profit that they were hoping for.”
(H1).

These different approaches are all reflected in the strategies of the respective companies, I will discuss these strategies in relation to the perspectives of the literature and the perspectives of the ‘Experts on Chinese Tourism’ in ‘Strategies and Visions of the Danish Tourism Sector’ (pp. 111).

They will become like other travellers with time

In ‘Weaknesses’ it was mentioned that one of the weaknesses in Chinese inbound tourism is that they don't spend a lot of money and that this is

due to the fact that they travel as GPTs. An opportunity in Chinese incoming tourism, which is related to this, is that the Chinese travellers, according to the sector representatives, with time, will become more like every other traveller, thereby erasing many of their special needs and their tendency to travel as GPTs. Or in other words moves from proneness to favour familiarity when travelling to a proneness to favour strangeness "... *I think that, at some point, the Chinese will also figure out how to go to Europe by themselves – that they don't want be a part of a travel group. They will also, like we have done in Denmark, find out how to travel on their own and then they will be like every other tourist group.*" (A1). This is interesting because a number of the Danish tourism representatives mention that they will only have real interest in Chinese travellers if they start travelling more independently, since the group travellers don't spend enough money at their hotel or attraction. A problem in relation to this could be that while many of the representatives are waiting for the Chinese tourists to become more independent travellers, the DMOs – Visit Denmark and Wonderful Copenhagen – that many of them trust to do their marketing are focussing on GTPs. I will also discuss this point further in following analysis (pp. 111).

Threats

Denmark is not a primary destination

Although the Danish tourism representatives argued that Denmark does have something to offer, most of them also agree with the perspective of the 'Experts on Chinese Tourism' who argue that the biggest threat in trying to get Chinese tourists to come to Denmark is that Denmark is not a primary destination for the Chinese. "*It is not the first destination that the Chinese will go to. (...) the first time they travel they go somewhere that they know about – they go to Paris or London, a place where there are some icons that they already know. I think that there is a bigger chance that they will come to us the second time or the third time.*" (A2). This comment refers back to the question of whether Denmark has enough iconic sights to attract Chinese tourists and it seems that in terms of attracting them the first times they go travelling, there is general agreement among the representatives that it does not. Instead they argue that Denmark and especially Copenhagen is second or third in line and if this is true, it further fuels the discussion of how Denmark should market itself to the Chinese. First, because most of the Chinese tourists that come to Denmark will

already be experienced travellers and second, because it can be argued that Denmark cannot compete with other countries in terms of iconic attributes and should thus not focus on these.

Lack of knowledge about Denmark

A second threat related to the fact that Denmark is not a primary destination for Chinese travellers is that not only the Chinese tourists, but also the Chinese tour operators have a lack of knowledge about Denmark as a tourist destination. *"What we can see is that many of the agencies in China, they don't have that great knowledge about Scandinavia (...) and even if we give it to them they don't feel secure – they don't know how to sell it. (IB).* This means that if one wants to sell Denmark as a destination to the Chinese it is not enough try to convince them to go to Denmark, one also needs to teach them what Denmark is. The H1 representative agrees with this notion as she argues *"It is unrealistic to believe that there is a preference for the Danish product. It is about how we manage to place the product and push it through the distribution channels and make it attractive"* (H1).

Yet, although the lack of knowledge is a weakness when wanting to attract Chinese tourists to Denmark, it also means that Danish marketers who promote Denmark in China are in a unique position where they have the chance to define the destination to the Chinese and maybe take advantage of the strangeness aspect which is favoured by the IITs. As I will discuss further in 'Strategies and Visions of the Danish Tourism Sector' (pp. 111), one can question whether the Danish marketers are currently exploiting this opportunity, as they are currently mainly marketing Denmark on the few iconic sights that the Chinese may or may not know about.

The Danish sector's understanding of incoming Chinese tourism

Judging from this analysis and discussion it seems that the Danish tourism sector representatives' overall understanding of incoming Chinese tourism is that it is something interesting because of its potential. Yet, at the same time the fact that Chinese tourists are still a relatively small tourism segment in Denmark and the fact that the ones who visit Denmark only stay for a short while, gives them less priority in the eyes of the representatives. As I will further argue in the following discussion this is one of the main explanations for many of the other problems relating to incoming Chinese tourism to Denmark.

In terms of characteristics, strengths and weaknesses the Danish tourism representatives seems to have good knowledge of the special needs that Chinese tourists have according to the literature. Yet, the representatives disagree with the literature in terms of the importance of these needs as they argue that most of them should be regarded as ways to accommodate Chinese tourists rather than actual needs, thereby agreeing with the 'Experts on Chinese Tourism'. This either suggests that the importance of some of these needs, for example language, food or culture related needs, is often exaggerated or based on the wrong reasons in the literature – at least in the case of Denmark - or that the sector representatives as well as the 'Experts on Chinese Tourism' are wrong. Two arguments that the first option might be the correct one are, first, that research on a certain topic might exaggerate the importance of that topic and second, that the literature never indicates that the lack of these amenities can provoke a deselection of a destination.

With that said, it is important to be aware that although fulfilling these needs might not attract Chinese tourists to the degree mentioned in the literature, providing these courtesies could create a competitive advantage in the long run, as it could produce positive evaluations from visiting Chinese tourists. In addition to this there are also two cases where the needs or characteristics of the Chinese tourists seem to be as important as indicated in the literature. The first is high shopping expenditures, which - although it might not be a main motivation to choose Denmark as a travel destination - according to the representatives, still is an important quality of the Chinese tourists. The second is an example where a cultural factor may be the reason for a problem with Chinese tourists in particular – the fact that they don't openly complain - which can be explained with the Chinese tourists' need to save face.

Aside from these conclusions this analysis and discussion has also provided additional fuel to the discussion of how to make the Chinese tourists stay longer, whether to market Denmark as a place with iconic sights or as a place with a unique feeling and in connection with this, whether to market to GPTs or IITs. I will discuss the points and conclusions in relation to these questions further in the following analysis where I will also discuss the strategies and visions of the Danish tourism sector representatives.

STRATEGIES AND VISIONS



Is the Danish Tourism Sector "China Ready"?

VISION AND STRATEGY THEORY

Elements of the SWOT analysis as well as elements from the literature review and the analysis of what it means to be “China ready”, will be included in the following final discussion, that investigates the visions and strategies of the Danish tourism sector in relation to incoming Chinese tourism. But since, vision and strategy are very broad and complex concepts I will need to establish an understanding of these concepts within the context of this thesis, before I can begin this discussion.

Vision

In this thesis the term vision refers to spoken visions regarding incoming Chinese tourism that the Danish tourism sector representatives may have. Hence I will not be investigating the overall organisation or company visions of the Danish tourism sector representatives.

I will argue that although Kotter mainly deal with overall company visions, his approach to vision is one of the least context dependent and thus elements of his perspectives on vision are applicable to the way that I plan to investigate vision. According to Kotter “*Vision refers to a picture of the future with some implicit or explicit commentary on why people should strive to create that future.*” (Kotter 1996:68). He argues that one of the most important points in having a vision is that a vision can facilitate major changes by motivating action that is not necessarily in people’s short-term self-interest (Ibid:69). This point is particularly interesting in this thesis because Chinese tourism is currently not a large tourism segment in Denmark, but potentially can be so in the future. Kotter also mention a number of questions that can help determine the desirability of a vision. I will look to these questions in my analysis and discussion of the visions of the representative companies in relation to incoming Chinese tourism. The questions are as follows:

- *“If the vision is made real, how will it affect customers?”*
- *For those who are satisfied today, will this keep them satisfied?*

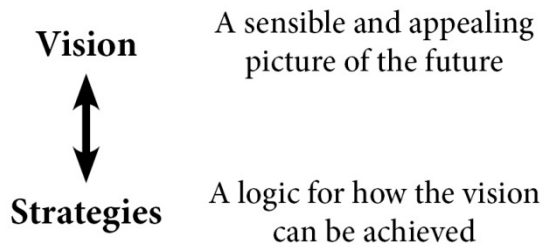
- *For those who are not entirely happy today, will this make them happier?*
- *For people who don't buy from us now, will this attract them?*
- *In a few years, we will be doing a better job than the competition of offering increasingly superior products and services that serve real customer needs?"*

(Ibid:74)

Strategy

Kotter argues that a vision has to be grounded in a clear and rational understanding of the organisation, its market environment, and competitive trends. *"This is where strategy plays an important role. Strategy provides both a logic and a first level of detail to show how a vision can be accomplished."* (Kotter 1996:75).

The model below illustrates the relation between vision and strategy.



(Based on Ibid:71)

Strategy is a very large subject that spans from military theory over game theory to business and marketing theory. Depending on what you are looking for, there are also very different levels in terms of studying strategy; reaching from detailed analysis of a single company strategy to overarching common features among the strategies of large numbers of different companies. In this thesis I will look at the tourism sector representatives' strategies in relation to Chinese inbound tourism from a relatively broad perspective since my data only provide basic information about the strategies of the organisations. With this broad approach I found Mintzberg et al. to be an ideal source, since their work with strategy covers a broad spectrum of strategy research, but keeps the theories at a level

where they can be applied to the context that I am working within.

Mintzberg et al. argue that no easy one-line definition of strategy can be made as the concept covers such a large research spectrum. Instead they argue that strategy can be defined by looking at it from five different angles or five different P's - Strategies as plans, patterns, positions, perspectives and ploys (Mintzberg et al. 2009:9). These five definitions all provide different perspectives on strategy and show that the type of strategy that a company utilise to reach a certain goal or vision can be very important as it fundamentally changes the way the company acts in trying to reach its goal. In my analysis I will include discussions of the types of strategies that the companies seem to utilise and comment on why exactly this model was chosen or whether it was actively chosen at all.

Strategies as plans and patterns

Strategy as a plan refers to an intended plan of action, while strategy as a pattern refers to strategy based on already realized past behaviour. The question in this regard is whether realised strategies have always been intended? According to Mintzberg et al. this question can be answered by asking people who can describe their realised strategy, whether this strategy was intended.

"A few may claim that their intentions were realised perfectly. Suspect their honesty. A few others may answer that what their realised strategies had nothing to do with what they intended. Suspect their behaviour. In our experience, the vast majority of people give an answer that falls in between these two extremes".
(Ibid:10)

Intentions that are fully realised can be called deliberate strategies, those that are not realised can be called unrealised, while a third option is an emergent strategy – where a pattern is realized that was not expressly intended (Ibid:12).

Strategies as positions and perspectives

Strategy as a position regards the locating of particular products in particular markets. With this strategic view a company looks to the external marketplace and decides a position where the product meets the customer and decides that this is where they need to be. In contrast, strategy as a perspective regards a company's fundamental way of doing things, with

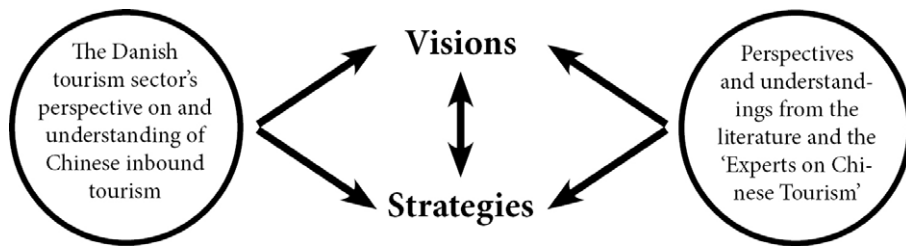
this approach the company will look inwards to the vision and basic idea of the enterprise (Ibid:13).

Strategy as a ploy

Strategy as a ploy can be understood as “... a specific ‘manoeuvre’ intended to outwit an opponent or competitor.” (Ibid:15).

These five approaches are very different and in discussing the strategies of the Danish tourism sector it will be interesting to see whether the sector has a coordinated strategic approach where they follow a single strategy and if not, what their different approaches imply about the individual organisations and their determination to attract Chinese tourists.

Analysis framework



This model illustrates the analysis framework for the following discussion of 'Strategies and Visions of the Danish tourism sector'. Here I will include perspectives from the two previous analyses and discussions in a final discussion of the visions and strategies of the Danish tourism sector in relation to incoming Chinese tourism.

STRATEGIES AND VISIONS OF THE DANISH TOURISM SECTOR

Looking at the previous analysis there is no doubt that the biggest strength in Chinese incoming tourism to Denmark is its potential. This is also reflected in the visions of the Danish tourism sector organisations, as most of them are quite optimistic when asked how the future will be in terms of Chinese tourists visiting their hotel, destination or attraction. Although all of them argue that it is very hard to tell, most of them assess that their current numbers will probably at least double within five years and quadruple within the next ten. *"If we had 75.000 nights in 2011 I would not be surprised if that had doubled in 2015"* (AC) *"There is a risk that I will look like an idiot when I say this number, but I think that we have at least half a million Chinese nights in ten years."* (DM01). I will argue that the fact that the biggest strength in Chinese incoming tourism to Denmark is a potential and not something currently present has big impact on the representatives views of, strategy toward and in some cases indecisiveness in terms of how to handle incoming Chinese tourism. As I will argue in the following, it seems that the most interesting consequence of this is that many of the Danish representatives seems to be caught between their optimistic visions about the Chinese market on the one side and a lack of available recourses and knowledge - because of the low current numbers - on the other.

Three strategic approaches

The Danish tourism sector representatives deal with issues relating to this dichotomy in a number of different ways. One way in which this becomes evident is in their different strategic approaches in terms of when and how to act toward the Chinese market. As mentioned previously (pp. 97), these approaches can be divided into three different groups: Pending, Passive and Active.

Passive – Strategy as a realized pattern

The passive approach is evident in the vague visions and the lack of particular strategies of IB, H2 and H5 when it comes to incoming Chinese

tourism. These representatives seem to be very satisfied with their current situation and thus have a very limited need to market themselves toward markets like the Chinese, although they still express excitement about and interest in the Chinese market and its potential. Because of this they exclusively trust the DMOs to do their marketing toward the Chinese market. In theoretical terms they seem to work with strategy as a realized pattern, which means that although they don't have any initiatives at the moment this may change if they can track a history of more Chinese customers. An obvious weakness in this approach is that their reaction might come too late as they are not proactive, and neither particularly aware of the market and its development.

Pending – Strategy as a plan

The pending approach is evident in the visions and strategies of H1 and A2. They envision potential in Chinese incoming tourism, but because their product is not yet totally fit for the Chinese costumers they are waiting for the right time and if that time comes, they will become active in attracting the Chinese tourists. Until this time, they trust the DMOs to do their marketing toward the Chinese market.

Referring back to the terminology presented in the strategy theory, I will argue that with this approach these companies see strategy as a plan of action. The strength in this approach is that the preferences of the Chinese tourists are taken into consideration and the choice of when the right time to get involved is will be based on a sound decision. The weakness on the other hand, is that this approach does not consider the fact that the Chinese, because of their lack of travel experience or lack of knowledge about Denmark, might not know what they want when travelling. With the pending approach they are thus not proactive in trying to attract Chinese tourists and because of this, there is a risk that the Chinese will never come, since no one has told them why they should.

Active – Strategy as position

Strategy as a position – where the company actively tries to locate particular products in particular markets - seems to be the approach that most of the representatives of the Danish tourism sector take in relation to incoming Chinese tourism, although they do it in very different ways, to a different extent and for different reasons.

There are of course differences in the nature of the strategies depending on whether it is a DMO, a hotel or a flight carrier. It could for example be argued that the DMOs should have a more natural interest in attracting new tourism segments to a given destination than a hotel. With that in mind H4 and A3 seems to have a very strong interest, belief and activity when it comes to Chinese incoming tourism. Although they both argue that it is something very new and something that they are trying out, they both have well argued strategies and visions in terms of how they will attract Chinese tourists and what their goals are. The same is more expectedly the case for AC and the DMOs, while H3 and A1 although they are active and trying different small initiatives, are very reliant on the work being done by the DMOs.

Relying on the DMOs

Looking at the strategies of the different tourism sector representatives it is interesting to note that there are no particular patterns in the actions of for example the hotels or the attractions. One could for example imagine that the hotels or at least the bigger hotels might act in similar ways, yet this discussion shows that this is not the case. Instead it shows that the main pattern in the strategies of the Danish tourism sector representatives is that, although some of the representatives have some initiatives, most of them mainly rely on the DMOs when it comes to strategic efforts in order to attract Chinese tourists to Denmark, Copenhagen and to their business. Thus comments like “... *the strategy is to let Wonderful Copenhagen and Visit Denmark run the show.*” (H3) are not uncommon in the interviews – even among the companies that have an *active* approach. I will argue that this is problematic as the Danish tourism sector puts too much responsibility in the hands of the DMOs, without actually understanding what the DMOs are trying to do.

As I will explain further in the following, this for example shows in the fact that most of the sector mainly want to attract IITs – because of their higher spending on accommodation and attractions - while the DMOs are mainly trying to attract GPTs. In addition to this I will argue that there is a problem in the fact that the DMOs possess three very different and important roles in relation to incoming Chinese tourism. At the same time the DMOs thus act as the experts on Chinese tourism, as an organisation

with their own goals – get as many tourists as possible² – and as a marketing company for the rest of the sector. Even though I don't doubt that the Danish DMOs are doing the best they can to fill all these roles, there are, as I will argue in the following, problems in trying fit into all of them at the same time.

The strategies of the DMOs

Both DMOs have a clear and very similar strategy in terms of how to attract Chinese tourists to Denmark/Copenhagen. They market Denmark/Copenhagen as a part of Scandinavia, mainly in cooperation with Norway (since Sweden has recently left the cooperation). They focus on B2B marketing, since this, according to them, is the only way to reach the Chinese consumers with the marketing budgets they have available. *“So our target group are the professionals – we don't go to the consumers.”* (DMO2). The combination of B2B marketing and seeing Denmark as a part of Scandinavia has so far resulted in the Chinese only staying in Denmark for one or two nights. *“They always do a packaged trip where they go for one day to Copenhagen, two days to Stockholm and then spend 5-6 days in the Norwegian mountains – we get very little from that Scandinavian solution.”* (DMO1). The strategic goal for DMO1 is to raise this number to three to four nights and the way to do this is according to the DMO1 representative to make the Chinese include North Zealand and Odense (The birthplace of H.C. Andersen) in the group package tours that they already do. *“So they spend four, maybe five days in Norway, and three, maybe four days in Denmark. (...) The Chinese know and like H.C. Andersen – and now we have to tell them that it is a must see to go to Odense to see where he came from. And then we have the North Zealand roundtrip. The Chinese are very aware of whether a sight is on UNESCO's list, so Kronborg Castle and Frederiksborg Castle.”* (DMO1). Thus it seems that the approach of the DMOs, who the rest of the Danish tourism sector to a large degree trust to do their marketing, is to market the iconic sights mainly in and around Copenhagen in order to attract GPTs and make them stay longer.

² One could argue that the DMOs do not act as an organisation with their own goals, as their job is to service the Danish tourism industry. Yet, when looking into the goals and targets of the DMOs it becomes obvious that they are also measured on the sheer number of tourists that they can attract. Visit Denmark's Annual Report 2010/2011 for example shows that the target of that year was to *“Attract more value-adding international leisure and business tourists to Denmark through international marketing.”* (Visit Denmark 2011a).

Pros and cons

As mentioned in both the previous analysis chapters there are clear advantages in attracting GPT tourists via iconic attractions - the main advantage being that the vast majority of the Chinese tourists travel as GPTs. Other advantages are that GPTs are easy to organise and that potential language issues are equalised because GPTs are led by a guide. The main advantages in marketing the iconic attributes of the destination is that it can potentially attract some IITs, as well as the GPTs that the marketing is aimed at. Another advantage of this focus could be that marketing the traditional iconic sights does not require that much knowledge about the preferences of Chinese tourists and hence not much work or many resources in terms of coming up with new products.

Despite these advantages the 'Experts on Chinese Tourism', as mentioned previously, see this approach as problematic for a number of reasons. First, they argue that the Danish iconic attractions are not strong enough compared to other destinations, second, the iconic destinations alone will, according to them, not make the Chinese tourists stay longer and third, this approach will almost exclusively benefit Copenhagen. The DMOs and the 'Experts on Chinese Tourism' seem to have quite the same overall goal - to get more Chinese tourists to go to Denmark and to make those who already come stay longer - but their disagreement seems to come from differing perspectives on how mature the Chinese tourists currently are. So while the DMOs argue that one needs to go for GPTs because this is the only way to reach a considerable number of Chinese tourists, the 'Experts on Chinese Tourism' argue that 20% of the Chinese tourists are already matured and are travelling as IITs and that we should concentrate on this group.

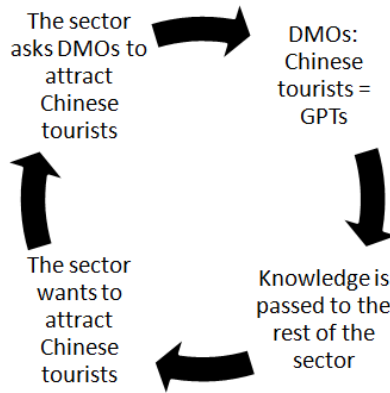
I will not argue that one approach is better than the other, but the analysis has given indications that the current approach might not be perfect. A main reason for this is that a big part of the representatives of the Danish tourism sector actually supports elements of the criticism of the current approach. Like the experts they for example argued that Denmark only has very few iconic destinations and sights, and that one should consider marketing the unique feeling and other less tangible attributes of the destination as this is what separates Denmark from other destinations. Yet, the most important problem relating to Chinese incoming tourism from the perspective of the tourism sector representatives is that the Chinese tourists spend very little money on anything other than shopping - a

problem which, as argued in the previous analysis, is exclusive to GPT tourists. Many of the tourism sector representatives thus mention that they are only interested in independent Chinese tourists and that they will wait for the Chinese tourists to mature before they take a real interest in the market. This perspective is very interesting when seen in relation to the strategy of the DMOs, since they have no clear intention of attracting IITs, meaning that there is a contradiction between the strategy of the DMOs and the needs of the rest of the Danish tourism sector. A contradiction that has created a current situation where many of the Danish tourism representatives are waiting for Chinese IITs to come, while their main marketing strategy is to pay the DMOs to attract GPTs.

A vicious circle

I will argue that this situation could be rooted in the size of the Chinese market combined with the triple role that the DMOs have in relation to Chinese tourism.

When looking at a market as big as the Chinese there is a tendency to try to simplify it by making broad assumptions and generalisations (Weaver & Lawton 2010:153). A good example of this is how I tried to simplify Chinese tourism by characterising 'the typical Chinese tourist' in the literature review (pp. 50) and still do so, by focussing on IITs and GPTs when I could have been focussing on 10 or 20 different segments of Chinese tourists. It is of course impossible to take every Chinese individual into consideration, but from my analysis so far it seems that the knowledge about Chinese tourism within the Danish tourism sector is focussing almost exclusively on GPTs. This could be due to the mentioned triple role that the DMOs possess (individual company, tourism sector expert on Chinese tourism and marketing organisation) combined with their focus on GPTs as this forms a vicious circle where the focus that the Danish DMOs have in relation to Chinese tourism – Chinese tourists are GPTs – becomes the general picture of Chinese tourists and affects the marketing of the whole sector.



The circle above is a simplified version of the knowledge transfer within the Danish tourism sector in relation to Chinese incoming tourism. The DMOs view of Chinese tourism is - because of their own focus - that Chinese tourists are GPTs. At the same time they have the role as the experts on Chinese tourism which means that they pass on knowledge on Chinese tourism to the rest of the sector. With their new found knowledge of the potential in Chinese tourism the rest of the sector turn to the DMOs in order to market to the Chinese tourists – as the DMOs also have the marketing company role. The DMOs then market Denmark to Chinese GPTs on behalf of the Danish tourism sector even though many of the companies within the sector might prefer IITs.

I will argue that if the DMOs did not have all three roles within the sector, this circle would be broken. If we imagine that they did not have the role of experts on Chinese tourism within the sector, there would be new knowledge coming in from the outside – maybe informing the rest of the sector that they should go directly for IITs, which would break the circle. If the DMOs did not possess the role of marketing company the rest of the sector might, after getting informed on the potential in the Chinese market by the DMOs, take their needs to another marketing company, who did not have the same focus as the DMOs, thereby potentially breaking the circle. Lastly if the DMOs did not possess the role of an individual company with its own goals, they might have a bigger interest in the specific needs of the sector and thus try to involve these needs more in the marketing – hence breaking the circle.

It should be noted that the weaknesses in all these scenarios might be heavily affected by the mentioned dichotomy - that the Chinese market is only a potential and therefore not something that the sector puts a lot of resources into. This would explain why the sector representatives choose to rely so heavily on the DMOs as their marketing company as well as their only information source in relation to Chinese tourism - since the services of the state supported DMOs are often cheap compared to private alternatives or making your own research.

Yet, I will argue that this is only part of the reason. Looking at the relations within the industry in connection to Chinese incoming tourism, three other possible explanations behind the vicious circle appear. One, the DMOs do not know that big parts of the tourism sector prefer IITs and/or the sector does not know that the DMOs are focussing their marketing strictly on GPTs. Two, the DMOs don't know/think that there is a substantial group of IITs that they can market to. Three, the DMOs and the sector agrees that it is currently impossible to attract IITs to Denmark and therefore they are attracting GPTs while waiting for them to mature and eventually become IITs. I will discuss these three scenarios in the following.

Knowledge gap between DMOs and the rest of the sector

When looking at the interviews and the strategies of the Danish tourism representatives in particular, there are clear indications that there could be a knowledge gap between the DMOs and the rest of the sector.

When asked about their cooperation in relation to Chinese incoming tourism most of the sector representatives answer that they cooperate with the DMOs, but many of them also mention that the cooperation is them buying a marketing package, rather than interaction "*First and foremost we buy into campaigns and marketing activities...*" (H1). Some even indicate that they do not know what the DMOs are doing in relation to China "*I don't know what Wonderful Copenhagen and Visit Denmark are doing (...)* *I haven't heard that they have any big initiatives in relation to China*" (H2). This indicates that there is a lack of *inclusion* (Hankinson 2007 in Therkelsen & Halkier 2011:3) of the stakeholders by the DMOs. In this situation one could choose to criticise the DMOs for not listening to the needs of the stakeholders, but to quote one of the 'Experts on Chinese Tourism' "*... a lot of researchers tend to criticise the authorities who are trying to attract tourists, because we say that they have to consult all the stakehold-*

ers and so on. That is correct – they have to do that, but in fact it is close to impossible” (R1). This is thus not only a problem for the DMOs, but also a problem for the rest of the sector, who, if they were more involved in their marketing on the Chinese market and were more explicit in terms of their needs regarding incoming Chinese tourists, might get more for their marketing money and in the long run, not just attract Chinese tourists, but the right Chinese tourists. This problem refers back to the contradiction between the sector wanting to exploit the potential in Chinese tourism, but not investing enough because it is still only a potential.

A question of the existence and relevance of IITs

Another explanation for the DMOs focus on GPTs and thus the disconnect between the needs of the sector and the actions of the DMOs may be grounded in the DMOs not knowing or thinking that there is a substantial group of Chinese IITs to attract.

According to the ‘Experts on Chinese tourism’ as well as the literature there is currently a considerable amount of IITs – R2 mentions that around 20% of Chinese outbound tourists belong to this group. While he, as well as T01 and T02 argue that many other countries have started marketing toward IITs. *“The German Tourism Board is already promoting it very strongly (...) also in France – they do wine tourism for example...”* (R2). Yet, he also argues that it can be very difficult to market to IITs.

From the analysis in this thesis it is hard to say whether there is enough IITs to make it interesting for the Danish tourism sector, but given that IIT tourism, according to the literature, is rising and that IITs seem to be the most interesting segment compared to GPTs – because of their spending - one could argue that the Danish tourism sector should be proactive in trying to attract them. If not as the main segment, then as a supplement to the current exclusive marketing toward GPTs. Especially when considering the point made in ‘Understandings of Incoming Chinese Tourism’ (pp. 89) where it was suggested that a main reason that the Chinese tourists travel as GPTs when going to Denmark could be that nothing else is offered and because they have no knowledge of other possibilities.

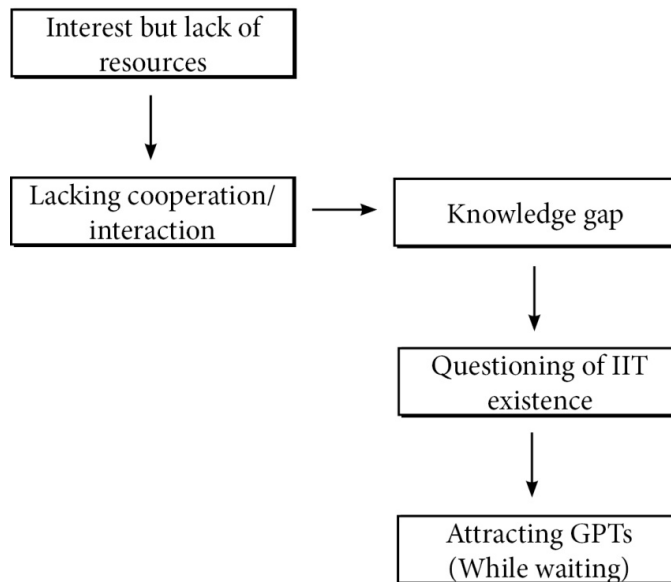
Attracting GPTs while waiting for IITs

A third explanation might be that the DMOs and the rest of the sector agree that Chinese tourists are currently not mature enough to travel as IITs and that they therefore instead try to attract GPTs now, in order to

stay relevant in the market and expect that the IITs will follow as the GPTs mature.

While I can to some degree agree with this strategy – attracting a lot of GPTs could be a good way to make Denmark known as a travel destination in China; it ignores the fact that there, as mentioned above, is already a considerable group of Chinese IITs coming to Europe. If it is a strategic decision only to target GPTs as they are the dominating segment and then hope that the IITs will follow, then it is a decision that entails a certain risk, since other markets that focus on both GPTs and IITs, might get an edge in terms of how to handle the IITs. Looking at the analyses so far I will argue that if it is a strategic decision, it is, again, based in the overarching problem in the dichotomy between being interested because of the potential, but not investing enough as it is merely a potential. It can thus be argued that the decision is made as a compromise - where they have some marketing toward the Chinese, but don't have to invest too much - rather than because this was seen as the ideal approach in order to attract as many GPTs and IITs as possible.

It is impossible to say with certainty that one or more of these explanations are the true ones. Yet, looking at the analysis and discussions of this thesis I will argue that elements of all these three explanations are probably part of why the current situation is as it is. Based on my results I will in fact argue that these explanations can be regarded as a process instead of different alternative explanations.



Looking at the analyses so far there is no doubt that the overall problem in the lack of investment because of low current numbers of Chinese tourist, but interest because of the potential is present. This dichotomy leads to lack of cooperation and interaction between the DMOs and the rest of the sector, which in turn leads to a knowledge gap between them, as the DMOs don't know what the stakeholders want, while the stakeholders don't make their needs clear. This knowledge gap could lead to a questioning of the existence of IITs, since the DMOs don't see them as essential, because of their low numbers compared to GPTs. Thus creating a situation where the sector is attracting GPTs while waiting for the IITs to mature.

This model illustrates how the three mentioned explanations for the current situation can also be regarded as three parts of a process that leads to the current situation. It is impossible for me to say that one explanation is the correct one, but it is interesting to consider how the fact that the current situation can be regarded and explained in so many different ways also illustrate the complexity of the situation and highlights the importance of inclusion and involvement of the stakeholders if the Danish tourism sector is to succeed in attracting Chinese tourists.

Strategies and visions

An inevitable point in this discussion was the question of whether one should market to GPTs, IITs or both. The DMOs and in turn the rest of the Danish tourism sector – wanting it or not – seem to focus almost exclusively on GPTs, while the ‘Experts on Chinese Tourism’ argue that they should instead concentrate on IITs. As argued in an earlier analysis there are lots of advantages in marketing to GPTs, yet this discussion suggest that the Danish tourism sector should be proactive in trying to attract the IITs as well. If not as the main segment, then as a supplement to the current exclusive marketing toward GPTs. Especially considering that a main reason that the Chinese tourists travel as GPTs when going to Denmark could be that nothing else is offered and because they have no knowledge of any alternatives.

The Danish tourism sector has three different strategic approaches to Chinese incoming tourism: Pending - Strategy as a plan, Passive - Strategy as a pattern and Active - Strategy as a position. Yet, common for most of the representatives is that their main strategy is to trust the DMOs to attract the Chinese tourists. This is however not the only role the DMOs have in the marketing toward Chinese tourists, they also possess the role of expert on Chinese tourism within the sector and the role of an individual company with its own goals. This creates a vicious circle where the DMOs focus on GPTs is transferred to the rest of the sector even though they mainly aim for IITs. Thus creating a situation where many of the Danish tourism representatives are waiting for Chinese IITs to come, while their main marketing strategy is to pay the DMOs to attract GPTs.

Three different possible explanations for this current situation were suggested: There is a knowledge gap between DMOs and the rest of the sector; the existence and relevance of IITs is questioned by the sector; the sector is attracting GPTs while waiting for IITs. Yet, it was argued that elements of all these explanations can form a process that could act as one explanation for the situation. This process is based on an overarching dichotomy between the Danish tourism sectors’ optimistic visions about the Chinese market on the one side and the low current numbers and thus lack of investment on the other. A dichotomy which might be the reason for many of the decisions made in relation to incoming Chinese tourism by the Danish tourism sector and hence, also the reason why many of the strategic decisions seem more like compromises between these two poles than the ideal approach to the given situation.

CONCLUSION



CONCLUSION AND REFLECTION

The purpose of this thesis is to answer the following research questions:

What is needed for the Danish tourism sector to be "China ready" and does the Danish Tourism Sector currently fulfil these demands?

- *What characterises Chinese tourists, what motivates their travel decisions and how can the Danish tourism sector attract them?*
- *What is the Danish tourism sector's understanding of incoming Chinese tourism and what visions and strategies does this understanding generate?*

In the search for answers to these questions three different data sources were included – interviews with experts on Chinese tourism, interviews with representatives of the Danish tourism sector and a review of literature on Chinese outbound tourism. Looking back at the thesis I will argue that these data sources have been sufficient to answer the research questions, especially when viewed within the methodological confines of this thesis. It is thus important to be aware that for example the choice of interviewees was affected by my pre-knowledge and a level of snowball effect, while the claims of the representatives about the organisations that they represent come from their own social constructions. In addition to this, the thesis is based on qualitative interviews which allows for in-depth analysis, but sacrifices generalisability. For these reasons the results of this thesis should be viewed as patterns that might resemble parts of the sector, rather than a generalisable picture of the Danish tourism sector. But with that said, I will argue that the thesis has brought forward very interesting patterns relating to the Danish tourism sector representatives' understanding of incoming Chinese tourism and that these patterns form a good offset for further research.

An extensive amount of literature on Chinese outbound tourism was reviewed and analysed in the making of the literature review for this thesis; providing an overview of existing knowledge on Chinese outbound tourism and motivations of Chinese outbound tourists in particular. Besides giving other researchers the opportunity for an overview of literature on

this subject, the review, combined with the analysis, points to some weaknesses within the existing literature on Chinese outbound tourism. It can for example be argued that much literature, because it has an isolated focus on the Chinese tourists and focus much less on the receiving end, tend to exaggerate some of the things that are found to be unique about the Chinese tourists. This thesis has thus shown that for example cultural concepts such as *face* although emphasised as being very important in the literature, might have a less important role when Chinese tourists go travelling, as the Chinese tourists change their behavioural patterns when they travel.

The literature review was concluded with a version of Pearce's travel career model that outlines the main motivations for Chinese outbound tourists, emphasising the most important needs of Chinese tourists when travelling. These included: 'Need for Chinese food', 'need for safe "adventure" and "exploration"', 'cultural needs', 'language needs' and 'prestige/status needs'. These needs were later explored further in a Danish context, but I will argue that this model on its own also has value as a valid representation of the main motivational needs of Chinese tourists, based on existing literature.

In the process of making this model I had to change Pearce's original Travel Career Needs model by ignoring the division between internal and external needs as well as self- and other related needs, since this division was found to be impossible vis-à-vis my social constructivist approach. Further modifications were made to the model later in the analysis process. At this point a more nuanced perspective on the motivations of the Chinese tourists was needed and the already modified version of Pearce's model was thus combined with the familiarity/strangeness continuum originally presented by Cohen. I will argue that, together, the modifications made to Pearce's model acts as an important contribution to motivation research, as the model work as a more nuanced tool for motivation research that does not attempt to make - from a social constructivist standpoint - impossible distinctions between the self and others.

The findings in the literature review was analysed and discussed in relation to the interviews with the 'Experts on Chinese Tourism'. This analysis and discussion added two connected needs to the model presented in the literature review – the 'need for familiarity', which is a broader need that for example contains the 'need for Chinese food' and 'language needs';

and ‘the need for a feeling of security’, which is a more psychologically based safety need than the ones presented in the review. The main conclusion of this analysis and discussion was that instead of the “typical Chinese tourist” presented in the literature review, one should at least divide Chinese tourists into group package tourists (GPTs) and independent and/or in-depth tourists (IITs), as there are major differences between these two main segments.

The GPTs are fast paced group tourists who value familiarity over strangeness and have a great need for prestige though shopping and consumption of iconic destinations and sights. With about 80% of the Chinese tourists being GPTs this is clearly the dominating segment. The IITs is a broader segment as they include both fully independent travellers and group travellers who wish for more in-depth experiences and do not have the urge to visit as many destinations as possible. This segment was found to value strangeness over familiarity and is consequently drawn by in-depth experiences, like the GPTs they also have a strong need for prestige, but this need is, unlike the GPTs, fulfilled through in-depth experiences rather than iconic sights. Some common ground was also found between these two groups as they both have a ‘need for safety and a ‘need for a feeling of security’ and are pulled by clean environment, low population and iconic attractions – although the IITs need more than only iconic attractions.

Some of these findings were included in the SWOT framed analysis and discussion of the Danish tourism sector’s understanding of incoming Chinese tourism. This analysis and discussion provides a number of interesting conclusions. First of all it is clear that while the sector representatives know about the special needs that Chinese tourists have according to the literature, they disagree with the literature in terms of the importance of these needs. There is thus agreement between them and the ‘Experts on Chinese tourism’ that most of these needs should be regarded as ways to accommodate Chinese tourists rather than actual needs that you have to fulfil. Although it was also argued that while this may be true; providing these courtesies could create a competitive advantage in the long run, as it could produce positive evaluations from visiting Chinese tourists. Some of the tourism sector representatives seem to recognise this, while others don’t and whether they do, seems dependent on whether their strategic approach is pending, active or passive. Yet, the most important take-away from this analysis was that there is a contradiction between the Danish tourism sector’s interest in incoming Chinese tourism, because of its po-

tential, and the lack of priority given to Chinese tourism, because it is still a small tourism segment in Denmark. This dichotomy was a recurrent subject in the discussion of the strategies and visions of the Danish tourism sector.

One of the most important points in this discussion was the question of whether one should market to GPTs, IITs or both. Here it was argued that while the DMOs thought that one should go for GPTs – because of their numbers, the ‘Experts on Chinese Tourism’ seemed inclined to go for IITs – because of their higher spending and longer stays. Although I am not to decide what the Danish tourism sector should do, the findings in this thesis indicate that there are advantages in trying to attract the IITs as well as the GPTs. If not as the main segment, then as a supplement to the current exclusive marketing toward GPTs. Especially considering that a main reason that the Chinese tourists travel as GPTs when going to Denmark seems to be that nothing else is offered to them and because they have no knowledge of any alternatives. Another reason that marketing to IITs should be considered is that a big part of the Danish tourism sector actually prefers this segment over GPTs. Yet, despite these advantages, the fact that the sector does not have many resources assigned for marketing toward Chinese tourists could act as an argument against this two sided approach.

Three different strategic approaches to incoming Chinese tourism were found among the Danish tourism sector representatives: Pending - strategy as a plan - who believe that one should change to accommodate the Chinese tourists, but that now is not yet the time; Passive – strategy as a pattern – who believe that Chinese tourists should blend in with other incoming tourist and Active - strategy as a position - who believe that something has to be done now, if one wants to attract Chinese tourists in the future.

Yet, common for all of them is that their main strategy is to trust the DMOs to attract the Chinese tourists. This is a problem because the DMOs in addition to the role of marketing company for the sector also acts as sector experts on Chinese tourism and an individual company with its own goals. This combination of roles creates a vicious circle where the DMOs’ focus on GPTs is transferred to the rest of the sector even though many of the other sector representatives are mainly interested in IITs. Thus creating a situation where many of the Danish tourism representatives are

waiting for Chinese IITs to come, while their main marketing strategy is to pay the DMOs to attract GPTs.

A discussion of the basis of this problematic situation suggested that there could be different explanations for the current situation, but that the situation can only be solved if the DMOs change at least one of their roles or the rest of the sector gets more involved in the marketing toward the Chinese tourists and make their demands and preferences more explicit. Another important conclusion from this discussion was that the root of most of the Danish tourism sector's problems in relation to incoming Chinese tourism is in the overarching dichotomy between the sectors' optimistic visions about the Chinese market on the one side and the lack of investment on the other. A dichotomy which might be the reason why many of the strategic decisions of the Danish tourism sector seem more like compromises between these two poles than the ideal approach to the given situation.

Based on the results of the analyses and discussions of this thesis the following observations and general conclusions can be made in relation to the main research question.

When "China Readiness" is normally discussed, journalists and tourism literature tend to be very focussed on the unique needs of the Chinese tourists and whether a destination can cater to these specific needs. Thus tilting the focus to be about how Chinese tourists are special, rather than whether the destination is ready for them.

In this thesis I have found a number of different needs, motivations and pull factors, some of them unique, which are important when wanting to attract Chinese tourists. Yet, this thesis has also shown that being "China ready" is as much about the destination and the receiving tourism sector as it is about the needs of the Chinese. More precisely it becomes visible that, apart from more obvious issues such as accessibility, which are in place in the case of Denmark, looking at the receiving tourism sector's understanding of Chinese tourism and its potential and particularly their visions and strategies toward it, as well as their involvement and determination in terms of reaching these visions, is just as important as them fulfilling specific needs of the Chinese tourists.

Based on this it can be concluded that “China readiness” is more complex than serving Chinese food or having Chinese brochures at your hotel or attraction and thus more is needed for a tourism sector to be “China ready”. In the case of the Danish tourism sector I will argue that it needs to be more “China invested” in order to be “China ready”. Being invested entails a stronger focus on the Chinese market including stronger determination in terms of which groups one wants to attract and better cooperation in terms of reaching this or these segments - this entails inclusion of the stakeholders on part of the DMOs and involvement in the marketing from the stakeholders. Only when these things are in place, the Danish tourism sector should begin looking at the specific needs of the Chinese tourists.

Whether the Danish tourism sector should be “China ready” or “China invested” is for them to decide, as it is a gamble to be invested in something that is merely a potential. Yet, this thesis indicates that if they choose to be invested, with a much more coordinated and streamlined effort not only from the DMOs, but from the whole sector, there is a greater chance that the potential will become reality and if they choose not to, there is a chance that they will fall behind and miss out if it does.

With this thesis I have made a number of contributions to the research of Chinese outbound tourism in general and especially Chinese incoming tourism to Denmark. Yet, additional research is necessary to further investigate the subject. On the supply side further research on the needs and motivations of Chinese tourists going to Denmark is needed - the ideal solution being a combination of qualitative and quantitative research that investigates Chinese tourists who visit Denmark before, during and after their trip. On the stakeholder side, a deeper theoretical analysis of the complex relations between DMOs and stakeholders could provide further perspectives on the dynamics of their cooperation and thus on the reasons behind their choices relating to Chinese incoming tourism, while broader research of the cooperation with other Scandinavian countries might also help in this respect. In terms of the theoretical contributions of this thesis, research that critically uses, evaluates and develops the presented modified Pearce model is needed to establish it as a competent tool within motivation research.

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APPENDIX



APPENDIX 1 - ABBREVIATIONS

Tourist types

GPT	-	Group Package Tourist
IIT	-	Independent and/or In-depth tourist

Experts on Chinese tourism

R1	-	Researcher 1 (Copenhagen Business School)
R2	-	Researcher 2 (COTRI China Outbound Tourism Research Institute)
TO1	-	Tour Operator 1 (China based tour operator)
TO2	-	Tour Operator 2 (Genuine China Tours)

Representatives of the Danish tourism sector

A1	-	Attraction 1 (Visit Carlsberg)
A2	-	Attraction 2 (The Royal Danish Collections)
A3	-	Attraction 3 (Odense City Museums)
AC	-	Airline Carrier (Scandinavian Airlines - SAS)
DM01	-	Destination Management Organisation 1 (Visit Denmark)
DM01	-	Destination Management Organisation 2 (Wonderful Copenhagen)
H1	-	Hotel 1 (Brøchner Hotels)
H2	-	Hotel 2 (Hilton Hotel Copenhagen)
H3	-	Hotel 3 (Grand Hotel)
H4	-	Hotel 4 (Crown Plaza Hotel)
H5	-	Hotel 5 (Copenhagen Star Hotel)
IB	-	Incoming Bureau (Kuoni Destination Management)

APPENDIX 2 - THE HISTORY AND CURRENT STATE OF CHINESE OUTBOUND TOURISM

In this chapter I will present a review that further explains the mechanisms that started the development mentioned in the introduction above and look into the current state of Chinese outbound tourism as well as its future potential.

The rise of Chinese outbound tourism

The beginning of outbound tourism from China was in 1983 when visits to friends and relatives in Hong Kong and Macau were legalized (Qu & Lam, 1997:594). Later, in 1990 and 1995 the permit to visit friends and relatives was expanded to include other Asian countries (Guo et al. 2007:313). However it was not until 1997 that self-supported outbound tourism was allowed and this was only to destinations that possessed the so called Approved Destination Status (ADS) - a scheme that remains today.

Approved Destination Status

Under the ADS scheme, certain Chinese operators were selected to arrange, promote and sell travel to specified destinations in collaboration with approved overseas partners who provide arrangements within the destination (Pan & Laws 2003:37). This scheme has later been softened, so that it is now possible for Chinese travellers to travel independently, although still only to ADS approved destinations.

The Mainland Chinese government has indicated seven guidelines that a country must abide by in order to receive ADS.

- The country should also generate outbound tourists to China.
- It should have favourable political relations with China.
- The country should have attractive tourism resources and suitable

- ble facilities for Chinese travellers.
- The safety of Chinese travellers should be guaranteed along with freedom from discrimination.
- The destination country should be easily accessible by transportation.
- There must be a balance of payments in terms of arrivals and expenditures of visitors from the ADS destination in China and Chinese people's expenditures in the ADS country.
- The market share of tourists from foreign countries to China, along with tourists from China to the ADS countries, should be increased reciprocally.

(Guo et al. 2007:322)

Up until 2010 a total of 139 countries and territories have received ADS (Lai et al. 2010:743) thereby expanding the potential for Chinese outbound tourism immensely. Yet this potential could only be fulfilled because of the explosive economic growth (International Monetary Fund 2011) and the resulting emergence of a large middle-upper class (Wang & Sheldon, 1995 in Cai et al. 2001:4), that China has experienced since the beginning of the 1980's, as well as the introduction of the 5-day working week in March 1995 which has enabled many Chinese to find time to travel for vacations (Zhang and Qu, 1996 in Kau & Lim 2005:232). Together these three factors have made China one of the fastest growing outbound tourism producing countries in the world with an average growth rate of 21 percent per year from 1997 to 2007 (National Bureau of Statistics of China 2010) surpassing the percentage rise of the country's national economy, inbound and domestic tourism, and primarily all other Asian and developed countries (Lai et al. 2010:743). Thus it is estimated that mainland Chinese made approximately 47.66 million trips outside Mainland China in 2009 (Ibid) a number that will double to 100 million by 2020 (World Tourism Organization, 2003).

The effect on Europe

A relevant question in relation to the topic of this thesis is whether this growth has any effect on the European market and on Denmark in particular. The answer to this question is yes, although the degree to which the Danish tourism industry has gained from it is yet unknown and therefore also a topic of this thesis.

The earliest and clearest marker of the Chinese interest in Europe from a tourism standpoint was in 2004 when ADS was given collectively to the EU member states (except for the United Kingdom) and members of the Schengen agreement. This permit instantly made China the fastest growing outbound travel market in Europe, and Chinese outbound travellers to European countries increased nine-fold compared to 2003 (Du & Dai:2005:17) and since then the UK along with others has also gotten ADS. In recent years, Europe has thus become the most popular long-haul destination for Chinese travellers with 44.5% of the Chinese long-haul outbound travellers going to Europe as a first-stop destination (Xie & Miao 2009:233).

In the case of Denmark China still cannot compete with the traditional markets such as Germany, Holland and Norway when looking at the number of nights in 2010, respectively 12 million, 1,1 million and 2,2 Million while China only accounts for 71.000 (Visit Denmark 2011). But when looking at the growth rate of the markets, the potential in attracting Chinese tourist becomes visible, thus while the three mentioned traditional markets have a growth of respectively -1,9%, -0,9% and 5,3% China has a growth of no less than 30,1% (Visit Denmark 2012).

Acknowledging and exploiting potential

The above shows that Chinese tourism in Denmark, Europe and the world in general is rising and has great potential. This potential only seems bigger when considering that in 2005 only 0.24% of China's population and 4% of the urban population had travelled outside China (Chow & Murphy 2008:64 & Credit Lyonnais Securities Asia, 2005 in Xiang et al. 2010:250) and that despite the global economic slowdown, China's economy is in good shape with a GDP growth rate of respectively 9,2%, 10,3%, 9,2% in 2009, 2010 and 2011 (People's Daily 2012), which means that the Chinese middle-upper class and thereby Chinese outbound travel is expected to continue growing steadily (although at a lower rate) which according to Lai et al. *"... will probably make China an even more important target market for destination marketing organizations (DMOs) worldwide."* (Lai et al. 2010:743). But with China being one of the only markets in this condition, along with the other BRIC countries, all eyes are fixed on them and destinations must therefore acknowledge the potential and be ready to make it attractive for the Chinese tourists to choose their destination if they want a piece of the action.

APPENDIX 3 - THE RE- SEARCH QUESTIONS BE- HIND THE INTERVIEW GUIDES

Kvale suggest that an interview guide should be based on a series of re-search questions which are translated in to easily understandable questions that, at the same time, does not flat out explain what information you actually want to gain from your interview (Kvale 2007:133-149). This section outlines the research questions that are behind the making of the two interview guides that was used in this thesis.

Interview guide 1 – Expert Interviews

This guide is used in my interviews with the experts on Chinese outbound tourists. The main purpose of the interview is to get information on the wants, needs and demands of Chinese tourists. More specifically to gain insight on what motivates Chinese tourists to go on holiday and whether the wants, needs, demands and motivations the Chinese have are unique or differ from the common needs of tourists.

In order to answer these questions I have formulated a series of research questions. These questions are the basis of the questions that I actually ask during the interview. By doing this I can ask questions during the interview that are easily understandable, while not giving away what information I am looking for, in line with the suggestions of Kvale 2007.

Purpose	Research question	Interview question
Presentation <i>I introduce myself, my thesis and the purpose of the interview, I also explain how the interview will be used and make sure that the interviewee is informed about issues regarding the confidentiality of the thesis.</i>		
Overview / Presentation <i>Overview and comfort</i> <i>Provides an overview of who the interviewee is, the company that the interviewee represents and where his or her experience with Chinese outbound tourism comes from.</i> <i>The questions should be relatively easy to answer and therefore give a comfortable start to the interview.</i>		Can you begin by presenting yourself and the organisation/company you represent? - Where does your experience with and knowledge of Chinese outbound tourism come from?
The general state of Chinese outbound tourism <i>Provides a perspective on the interviewee's view of Chinese outbound tourism and its potential.</i>	Where is Chinese outbound tourism now and where is it going according to the expert? What is experts overall knowledge of and perspective on Chinese outbound tourism?	How would you describe the state that Chinese outbound tourism is currently in? - Strengths, weaknesses? (In the World, Europe, Scandinavia, Denmark) - How do you predict that it will develop in the coming years? (In the World, Europe, Scandinavia, Denmark)

<p>Chinese tourists – who are they, how do they travel and where do they prefer to go? <i>The answers to these questions should help provide a picture of who the Chinese tourists are.</i></p>	<p>How do they see Chinese tourists?</p> <ul style="list-style-type: none"> - Are the tourists mostly rich, middle class or? - Is it true that all Chinese tourists prefer fast paced tour groups? - Do they go for a good deal or go all in, regarding accommodation etc. - Which destinations do Chinese tourists prefer and why do they prefer these? - Where does Europe and Scandinavia in particular stand in relation to this? 	<p>How would you describe the typical Chinese tourist?</p> <ul style="list-style-type: none"> - Where is he/she from? - Income level (are they budget conscious)? - Age? - What type of travel (group, independent, business, leisure etc.) – why this type? - Where does he or she go? - Why these destinations?
	<p>When they talk about the typical Chinese tourists, then how big a segment do they include?</p>	<p>How big a part of the tourists that you deal with fit this description?</p> <ul style="list-style-type: none"> - If it is a big part: Why do you think that this is the case? - If it is only a small part: What other types are there and which ones are the most important?
	<p>How does Denmark/Scandinavia fit into these needs?</p>	<p>Would this person choose Denmark/Scandinavia as a destination?</p> <ul style="list-style-type: none"> - Why/why not? - Does it make sense to market Denmark alone to the Chinese?

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	<p>Which destinations do the Chinese go to and why do they choose these for example instead of Denmark?</p>	<p>What are the most popular non-Chinese destinations (outside mainland China, Taiwan, Hong Kong and Macau)?</p> <ul style="list-style-type: none">- Why do you think the Chinese tourist prefer these particular destinations?- Where does Europe and Scandinavia in particular stand in relation to these destinations?
	<p>Does cultural issues that are mentioned in the literature have an effect according to the experts?</p>	<p>What are the most popular non-Chinese destinations (outside mainland China, Taiwan, Hong Kong and Macau)?</p> <ul style="list-style-type: none">- Why do you think the Chinese tourist prefer these particular destinations?- Where does Europe and Scandinavia in particular stand in relation to these destinations?
	<p>Are there big differences between the view of Chinese tourists presented in the literature and the experts view of Chinese tourists?</p> <ul style="list-style-type: none">- If so, why?	<p>The literature on Chinese outbound tourists indicate that the typical Chinese tourist is XXX why do you think that this difference exist?</p>

<p>The motivations, wants and needs of Chinese tourists</p> <p><i>The purpose of these questions is to get further information about the Chinese tourists motivations for choosing a destination and in particular to find out whether they have wants and needs that are unique compared to other tourists.</i></p>	<p>What are the most important motivations when Chinese tourist chose a destination?</p> <p>Are there particular things that are more important than others when Chinese tourist choose destination?</p>	<p>Which specific destination attributes and experiences do the Chinese tourists prioritize (Nature, cities, shopping etc.)?</p> <ul style="list-style-type: none"> - Are these the primary reason that the tourist chose a specific destination? - If not, then what is? - Is there more specific amenities or services requirements that are important to Chinese tourists? - <i>Mention the results of the literature</i>
	<p><i>Reversing the question might bring out other answers.</i></p>	<p>Are there certain things that will make Chinese tourists avoid a destination?</p> <ul style="list-style-type: none"> - If yes, what?
	<p>Are the Chinese different from other tourists?</p> <ul style="list-style-type: none"> - If so, what does this mean? - Do they agree with the literature? 	<p>Would you say that there are tastes or demands of Chinese tourists that are significantly different from those of for example Europeans or other people in Asia?</p> <ul style="list-style-type: none"> - If yes, what are these and how much do they matter? - If no – the literature generally states that there is, why do you think that you don't have the same experience?

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	<p>What is the experts perspectives on strategy in relation to incoming Chinese tourism?</p> <ul style="list-style-type: none"> - <i>This question should bring forward criticism of existing strategies if there is any.</i> 	<p>Should a destination make strategies toward attracting Chinese tourists specifically or can they be incorporated in existing strategies?</p> <ul style="list-style-type: none"> - What should such a strategy entail?
<p>Cooperation <i>These questions should bring forward the experts knowledge and understanding of the cooperation currently done to attract Chinese tourists to Denmark.</i></p>	<p>Do the experts have knowledge on the current Danish effort?</p> <p>Do they find it satisfying?</p>	<p>Do you have a perspective on whether cooperation in terms of attracting Chinese tourism to Denmark is done?</p> <ul style="list-style-type: none"> - How would you characterise this cooperation? - Is it enough, is it good enough?
	<p>Can it be done better that it currently is or are they just criticising – what is their perspective?</p>	<p>If you were to recommend that the Danish tourism industry make some bigger changes in order to better fit the Chinese tourist needs, what would you recommendation be?</p>
<p>Challenges in relation to Chinese outbound tourism <i>These questions should make the interviewee talk about the challenges and problems that can arise when dealing with Chinese outbound tourism and how these problems potentially can be solved.</i></p>	<p>Are there problems on state level in relation to countries receiving Chinese tourists, obtaining visa etc.</p>	<p>Do you know of any problems with certain countries, for example in gaining a Visa, which could make the Chinese tourist, chose a different or specific destination?</p> <ul style="list-style-type: none"> - Can you suggest any measures on company or state level that would help solve these problems?

	Are there still any challenges in relation to the Chinese government even though many countries by now have received ADS status?	Most of the bigger countries have gotten ADS (Approved Destination Status), however do you still think that there are challenges in relation to this or similar to this? - Do you have any thoughts of what could help solve these problems?
	Are there problems in relation to the image of Chinese tourists in the rest of the world?	Are there any other challenges when Chinese tourists travel as tourists in Europe, Scandinavia and Denmark in particular?
	Do the experts have any perspectives in terms of solving potential problems?	How do you see the future for Chinese outbound tourism?
Finishing Comments <i>Gives the interviewee the opportunity to make comments, ask questions and get the last word.</i>		Is it ok that I contact you via e-mail or telephone with further questions? Do you know any experts within this area that you think I should talk to? Do you have any questions or comments before we end the interview?

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Interview guide 2 – Interviews with Danish tourism industry

This guide is used in my interviews with the representatives of the Danish tourism industry. The main purpose of these interviews is to get information on the interviewee's image of Chinese tourists and the potential in incoming Chinese tourism as well as the potential actions and strategies that they have or want to implement in order to attract Chinese tourists.

Like it was the case with Interview Guide 1 I have, in line with the suggestions of Kvale 2007, formulated a series of research questions, which will be the basis of the questions that I actually ask during the interview. This description will be in English so it is readable for most of the readers of this thesis although the interview guide itself will be in Danish as the questions are directed toward Danish interviewees.

Purpose	Research question	Interview question
Presentation <i>I introduce myself, my thesis and the purpose of the interview, I also explain how the interview will be used and make sure that the interviewee is informed about issues regarding the confidentiality of the thesis.</i>		
Overview / Presentation <i>Overview and comfort</i> <i>Provides an overview of who the interviewee is, the company that the interviewee represents and where his or her experience with Chinese outbound tourism comes from.</i> <i>The questions should be relatively easy to answer and therefore give a comfortable start to the interview.</i>		Can you begin by presenting yourself and the organisation/company you represent? - Where does your experience with and knowledge of Chinese outbound tourism come from?
The interviewee's perspective on incoming Chinese tourism <i>These questions should give an indication of the interviewee's knowledge of, interest in and perspective on incoming Chinese tourism.</i>	Does the interviewee and the company he or she represents generally have an interest in incoming Chinese tourism? - Is there any prejudice against Chinese tourists?	Ser du indkommende kinesisk turisme til Danmark som noget interessant/væsentligt? - Kan du uddybe hvad der gør det interessert/uinteressant?

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	Does the interviewee agree with the literature in terms of the huge potential in Chinese tourism?	<p>(Use if relevant) Litteraturen påpeger at de kinesiske turister er en lille turistgruppe i DK, men at den er kraftigt stigende, har dette indflydelse på, dit syn på/ageren ift. det kinesiske marked?</p> <ul style="list-style-type: none"> - Litteraturen peger eksempelvis også på at kinesere bruger mange penge når de rejser, har dette ikke en betydning?
	Are there previous experiences or pre-knowledge that affect the opinion (positive/negative) on Chinese tourists in general?	<p>Har du nogen form for erfaring med kinesisk turisme?</p> <ul style="list-style-type: none"> - Hvad består denne erfaring i? - Er det positiv eller negativ erfaring?
	What is the interviewees perspective on Chinese tourist in general compared to the literature and the experts?	<p>Hvad karakteriserer efter din mening/erfaring en kinesisk turist?</p> <ul style="list-style-type: none"> - Ser du dette som en positiv beskrivelse af en turist eller en negativ?

<p>The interviewee's perspective on incoming Chinese tourism in relation to his/her company <i>These questions should give a perspective of how important Chinese tourism is to the company that the interviewee represents.</i></p>	<p>How highly are Chinese tourists prioritized, and will this change in the future?</p> <p>How important is Chinese tourism to their business?</p>	<p>Er kinesiske turister en del af jeres nuværende interesse/kunde gruppe?</p> <ul style="list-style-type: none"> - Hvis ikke, hvorfor ikke? If. ovenstående spørgsmål i henhold til litteraturen. - Har du nogle konkrete informationer på hvilken betydning de kinesiske turister har (hvor mange er det, bruger de mange penge osv.)? - Mener du at dette bliver mere eller mindre i fremtiden?
	<p>What is the reason for this way of prioritising?</p>	<p>Er kinesiske turisme specielt interessant i forhold til den virksomhed du repræsenterer?</p> <ul style="list-style-type: none"> - Hvorfor, hvorfor ikke? - Hvad er det specifikt der gør kinesiske turister relevante/irrelevante for din virksomhed?
	<p><i>For them to think about both positive and negative aspects of Chinese tourism.</i></p>	<p>Kan du nævne tre positive og tre negative ting ved kinesiske turister set i forhold til din virksomhed og i forhold til andre turist segmenter?</p>

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<p>Strategy toward attracting Chinese tourists <i>The purpose of these questions is to investigate whether the companies/organisations have done something organised in their effort to attract Chinese tourists.</i></p>	<p>How highly is Chinese tourism prioritised compared to other segments? Is this a reasonable explanation for their choices?</p>	<p>(If this is not already clear) Hvor højt vil du vurdere at I prioriterer kinesisk turisme I forhold til andre turist-segmenter? - Vil denne prioritering ændre sig i fremtiden?</p>
	<p>Are they focussed on Chinese tourism or is it something that they do just because they can?</p>	<p>Har i fremstød eller tiltag som udelukkende retter sig mod kinesiske turister, eller inkluderer I dem i andre segmenter? - Hvilke tiltag og hvorfor netop disse? - Hvilket segment er de kinesiske turister en del af og hvilke fællestræk gør at de er i netop den gruppe? - Hvis relevant – Er der bestemte segmenter af de kinesiske turister som i forsøger at tiltrække?</p>
	<p>More detailed descriptions of what they do to accommodate Chinese tourists? - How does this fit with the literature?</p>	<p>(Kun relevant for hoteller/attraktioner) Hvis man ser lidt mere lavpraktisk på det er der så services eller lignende som I har tilføjet, fjernet eller ændret for at tiltrække kinesiske turister?</p>

	<p>Do they have a China strategy?</p> <ul style="list-style-type: none"> - If so, does it seem like this strategy is working? - What does this strategy entail? 	<p>Vil du sige at I har en specifik kina-strategi?</p> <ul style="list-style-type: none"> - Hvis ja, hvad består denne i? - Hvis nej, hvorfor har I valgt ikke at prioritere dette? - Hvordan markedsfører I jer til de kinesiske turister <ul style="list-style-type: none"> - hvad fokuseres der på og hvorfor netop dette?
	<p>Do they cooperate with other hotels, attractions, DMOs about Chinese tourism?</p> <ul style="list-style-type: none"> - How does this cooperation work? - How does the cooperation mentioned by different respondents fit together? - Do they prioritise cooperation? 	<p>Samarbejder I med andre virksomheder, DMO'er eller f.eks. kinesiske tur-operatører om at tiltrække kinesiske turister? (Horisontalt/vertikalt!)</p> <ul style="list-style-type: none"> - Har du eksempler på hvor I har positivt samarbejde omkring dette? - Hvordan spiller jeres indsats sammen med hvad f.eks. andre DMO'er gør? - Er det efter din mening vigtigt med samarbejde når man har med fjernmarkeder at gøre?

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<p>Challenges when dealing with Chinese tourists compared to other tourist segments?</p> <p><i>These questions should give a perspective understanding of and experience with the challenges that can occur when dealing with Chinese tourists.</i></p>	<p>Are there particular issues when dealing with Chinese tourists compared to other tourism groups?</p> <ul style="list-style-type: none"> - How does this affect their perspective on Chinese tourism? 	<p>Har du oplevet eller forestiller du dig at der er bestemte problemer eller udfordringer i forhold til at agere med eller tiltrække kinesiske turister i forhold til andre grupper?</p> <ul style="list-style-type: none"> - Hvordan påvirker disse udfordringer/problemer dit syn på potentialet i kinesisk turisme? - Har du forslag til hvordan disse problemer kunne løses?
	<p>If they don't mention particular problems by themselves, then how do they relate to the some of the challenges mentioned in the literature?</p>	<p>Litteraturen påpeger disse problemer (f.eks. sprog, mad, visum regulationer, kulturelle forskelle) kan du ikke genkende til nogle af dem?</p> <ul style="list-style-type: none"> - Hvorfor var de ikke i blandt dem du selv nævnte – er det småting?
	<p>Do they have any suggestions in terms of solutions to these problems?</p>	<p>Er der for eksempel ting som vi kunne gøre fra politisk side som ville gøre det nemmere og mere attraktivt for jer at tiltrække kinesiske turister?</p>

<p>Reflections on the future <i>These questions provide knowledge on the interviewee's perspective on the future of Chinese tourism.</i></p>	<p>What are their perspectives on the future and what are their visions for Chinese incoming tourism?</p> <ul style="list-style-type: none"> - Will they continue to act as they do now or will they change? - Are they positive or negative in terms of the future of Chinese tourism for them and for Denmark? 	<p>Hvordan ser du fremtiden for kinesisk turisme i Europa/Scandinavien/Danmark?</p> <ul style="list-style-type: none"> - Er det et stort marked? - Er I mere eller mindre interesserede/involverede i det end I er nu? - Er der mere eller mindre samarbejde med andre virksomheder eller andre DMO'er, hvordan ser dette samarbejde ud?
<p>Finishing comments <i>Gives the interviewee the opportunity to make comments, ask questions and get the last word.</i></p>		<p>Er det ok at jeg kontakter dig igen via telefon eller e-mail med uddybende spørgsmål?</p> <p>Kender du nogle eksperter på dette område som du mener jeg bør tale med?</p> <p>Har du nogle kommentarer eller spørgsmål inden vi ender interviewet?</p>

APPENDIX 4 - INTERVIEW GUIDES

Interview guide 1 – Expert Interviews

This interview guide is a tool which will help me in the execution of my interviews with the experts on Chinese tourists. The guide is made on the basis of a number of research questions which can be found in Appendix 3.

Presentation

Introduction

- *I am a tourism student from Aalborg University and I am currently writing my master thesis*
- *With my thesis I aim to investigate whether the Danish tourism industry is “China ready”*
- *In order to do this I will look at the side of the Chinese tourist as well as the side of the Danish tourism industry.*
- *I will investigate the needs and motivations of Chinese outbound tourists through interviews with experts on Chinese outbound tourism as well as a literature review in which I discuss existing knowledge on Chinese outbound tourism.*
- *I will investigate the Danish tourism industry through interviews with 10 to 15 interviews with representatives of DMO's, Hotels and attractions.*
- *Lastly I will discuss the results of these two investigations and compare the preferences of the Chinese tourist with the Danish travel industry's view on and potential strategy for Chinese incoming tourists.*

Overview / Presentation

Overview and comfort

Can you begin by presenting yourself and the organisation/company you represent?

- Where does your experience with and knowledge of Chinese out-

bound tourism come from?

The general state of Chinese outbound tourism

Provides a perspective on the interviewee's view of Chinese outbound tourism and its potential.

How would you describe the state that Chinese outbound tourism is currently in?

- Strengths, weaknesses? (In the World, Europe, Scandinavia, Denmark)
- How do you predict that it will develop in the coming years? (In the World, Europe, Scandinavia, Denmark)

Chinese tourists – who are they, how do they travel and where do they prefer to go?

The answers to these questions should help provide a picture of who the Chinese tourists are.

How would you describe the typical Chinese tourist?

- Where is he/she from?
- Income level (are they budget conscious)?
- Age?
- What type of travel (group, independent, business, leisure etc.) – why this type?
- Where does he or she go? Why these destinations?

Would this person choose Denmark/Scandinavia as a destination?

- Why/why not?
- Does it make sense to market Denmark alone to the Chinese?

How big a part of the tourists that you deal with fit this description?

- If it is a big part: Why do you think that this is the case?
- If it is only a small part: What other types are there and which ones are the most important?

(If his/her answer differ from the literature) The literature on Chinese outbound tourists indicate that the typical Chinese tourist is XXX why do you think that this difference exist?

What are the most popular non-Chinese destinations (outside mainland China, Taiwan, Hong Kong and Macau)?

- Why do you think the Chinese tourist prefer these particular destinations?
- Where does Europe and Scandinavia in particular stand in relation to these destinations?

Are there specific things within Chinese culture that might affect them when choosing destination and go travelling?

- The literature for example mentions face as important in relation to the need for service, do you recognise this or have similar examples?
- Do you think that the cultural aspects are still important and will continue to be so in the future?

The motivations, wants and needs of Chinese tourists

The purpose of these questions is to get further information about the Chinese tourists motivations for choosing a destination and in particular to find out whether they have wants and needs that are unique compared to other tourists.

Which specific destination attributes and experiences do the Chinese tourists prioritize (Nature, cities, shopping etc.)?

- Are these the primary reason that the tourist chose a specific destination?
- If not, then what is?
- Is there more specific amenities or services requirements that are important to Chinese tourists?
- *Mention the results of the literature*

Are there certain things that will make Chinese tourists avoid a destination?

- If yes, what?

Would you say that there are tastes or demands of Chinese tourists that are significantly different from those of for example Europeans or other people in Asia?

- If yes, what are these and how much do they matter?
- If no – the literature generally states that there is, why do you think that you don't have the same experience?

Should a destination make strategies toward attracting Chinese tourists specifically or can they be incorporated in existing strategies?

- What should such a strategy entail?

Cooperation

These questions should bring forward the experts knowledge and understanding of the cooperation currently done to attract Chinese tourists to Denmark.

Do you have a perspective on whether cooperation in terms of attracting Chinese tourism to Denmark is done?

- How would you characterise this cooperation?
- Is it enough, is it good enough?

If you were to recommend that the Danish tourism industry make some bigger changes in order to better fit the Chinese tourist needs, what would your recommendation be?

Challenges in relation to Chinese outbound tourism

These questions should make the interviewee talk about the challenges and problems that can arise when dealing with Chinese outbound tourism and how these problems potentially can be solved.

Do you know of any problems with certain countries, for example in gaining a Visa, which could make the Chinese tourist, choose a different or specific destination?

- Can you suggest any measures on company or state level that would help solve these problems?

Most of the bigger countries have gotten ADS (Approved Destination Status), however do you still think that there are challenges in relation to this or similar to this?

- Do you have any thoughts of what could help solve these problems?

Are there any other challenges when Chinese tourists travel as tourists in Europe, Scandinavia and Denmark in particular?

How do you see the future for Chinese outbound tourism?

Finishing comments

Is it ok that I contact you via e-mail or telephone with further questions?

Do you know any experts within this area that you think I should talk to?

Do you have any questions or comments before we end the interview?

Interview guide 2 – Danish Tourism Sector

This interview guide is a tool which will help me in the execution of my interviews with the representatives of the Danish tourism industry. The guide is made on the basis of a number of research questions which can be found in Appendix 3. This interview guide will be used in all the interviews although slight editions will be made to fit the specific interviewee company.

Presentation

Introduction

- *Jeg læser turisme ved Aalborg Universitet og jeg er i øjeblikket ved at skrive mit speciale.*
- *Mit mål med specialet er at undersøge hvorvidt den danske turismebranche er "China Ready".*
- *Jeg vil undersøge dette ved at undersøge både de kinesiske turister og den danske turismeindustri.*
- *Mht. de kinesiske turister vil jeg undersøge de behov og motivationsfaktorer der påvirker dem når de skal vælge en destination. Det vil jeg gøre gennem interviews med eksperter på kinesisk turisme, samt gennem et litteratur review, hvor jeg diskuterer eksisterende viden på området.*
- *I forhold til at undersøge den danske turismebranche vil jeg lave 10 til 15 interviews med repræsentanter for den danske turismebranche – det vil bl.a. være DMO'er, hoteller og attraktioner.*
- *Til sidst vil jeg så diskutere resultaterne af de to undersøgelser i forhold til hinanden og sammenligne de kinesiske turisters præferencer og det litteraturen siger om kinesisk turisme med den danske turisme industris syn på og eventuelle strategi for indkommende kinesisk turisme.*

Overview / Presentation

Overview and comfort

Vil du starte med at præsentere dig selv og den virksomhed du repræsenterer?

The interviewee's perspective on incoming Chinese tourism

These questions should give an indication of the interviewee's knowledge of, interest in and perspective on incoming Chinese tourism.

Ser du indkommende kinesisk turisme til Danmark som noget interessant/væsentligt?

- Kan du uddybe hvad der gør det interesserant/uinteressant?

(Use if relevant) Litteraturen påpeger at de kinesiske turister er en lille turistgruppe I DK, men at den er kraftigt stigende, har dette indflydelse på, dit syn på/ageren ift. det kinesiske marked?

- Litteraturen peger eksempelvis også på at kinesere bruger mange penge når de rejser, har dette ikke en betydning?

Har du nogen form for erfaring med kinesisk turisme?

- Hvad består denne erfaring I?
- Er det positiv eller negativ erfaring?

Hvad karakteriserer efter din mening/erfaring en kinesisk turist?

- Ser du dette som en positiv beskrivelse af en turist eller en negativ?

The interviewee's perspective on incoming Chinese tourism in relation to his/her company

These questions should give a perspective of how important Chinese tourism is to the company that the interviewee represents.

Er kinesiske turister en del af jeres nuværende interesse/kunde gruppe?

- Hvis ikke, hvorfor ikke? Jf. ovenstående spørgsmål i henhold til litteraturen.
- Har du nogle konkrete informationer på hvilken betydning de kinesiske turister har (hvor mange er det, bruger de mange penge osv.)?
- Mener du at dette bliver mere eller mindre i fremtiden?

Er kinesiske turisme specielt interessant i forhold til den virksomhed du repræsenterer?

- Hvorfor, hvorfor ikke?
- Hvad er det specifikt der gør kinesiske turister relevante/irrelevante for din virksomhed?

Kan du nævne tre positive og tre negative ting ved kinesiske turister set i forhold til din virksomhed og i forhold til andre turist segmenter?

Strategy toward attracting Chinese tourists

The purpose of these questions is to investigate whether the companies/ organisations have done something organised in their effort to attract Chinese tourists.

(If this is not already clear) Hvor højt vil du vurdere at I prioriterer kinesisk turisme i forhold til andre turistsegmenter?

- Vil denne prioritering ændre sig i fremtiden?

Har i fremstød eller tiltag som udelukkende retter sig mod kinesiske turister, eller inkluderer I dem i andre segmenter?

- Hvilke tiltag og hvorfor netop disse?
- Hvilket segment er de kinesiske turister en del af og hvilke fællestræk gør at de er i netop den gruppe?
- *Hvis relevant* – Er der bestemte segmenter af de kinesiske turister som i forsøger at tiltrække?

(Kun relevant for hoteller/attraktioner) Hvis man ser lidt mere lavpraktisk på det er der så services eller lignende som I har tilføjet, fjernet eller ændret for at tiltrække kinesiske turister?

Vil du sige at I har en specifik kinastrategi?

- Hvis ja, hvad består denne i?
- Hvis nej, hvorfor har I valgt ikke at prioritere dette?
- Hvordan markedsfører I jer til de kinesiske turister – hvad fokuseres der på og hvorfor netop dette?

Samarbejder I med andre virksomheder, DMO'er eller f.eks. kinesiske turoperatører om at tiltrække kinesiske turister? (Horisontalt/vertikalt!)

- Har du eksempler på hvor I har positivt samarbejde omkring dette?
- Hvordan spiller jeres indsats sammen med hvad f.eks. andre DMO'er gør?
- Er det efter din mening vigtigt med samarbejde når man har med fjernmarkeder at gøre?

Challenges when dealing with Chinese tourists compared to other tourist segments?

These questions should give a perspective understanding of and experience with the challenges that can occur when dealing with Chinese tourists.

Har du oplevet eller forestiller du dig at der er bestemte problemer eller udfordringer i forhold til at agere med eller tiltrække kinesiske turister i forhold til andre grupper?

- Hvordan påvirker disse udfordringer/problemer dit syn på potentialet i kinesisk turisme?
- Har du forslag til hvordan disse problemer kunne løses?

Litteraturen påpeger disse problemer (f.eks. sprog, mad, visum regulationer, kulturelle forskelle) kan du nikke genkendende til nogle af dem?

- Hvorfor var de ikke i blandt dem du selv nævnte – er det småting?

Er der for eksempel ting som vi kunne gøre fra politisk side som ville gøre det nemmere og mere attraktivt for jer at tiltrække kinesiske turister?

Reflections on the future

These questions provide knowledge on the interviewee's perspective on the future of Chinese tourism.

Hvordan ser du fremtiden for kinesisk turisme I Europa/Scandinavien/Danmark?

- Er det et stort marked?
- Er I mere eller mindre interesseret/involveret i det end I er nu?
- Er der mere eller mindre samarbejde med andre virksomheder eller DMO'er, hvordan ser dette samarbejde ud?
- Har du forslag til hvordan disse problemer kunne løses?

Finishing comments

Er det ok at jeg kontakter dig igen via telefon eller e-mail med uddybende spørgsmål?

Kender du nogle eksperter på dette område som du mener jeg bør tale med?

Har du nogle kommentarer eller spørgsmål inden vi ender interviewet?

APPENDIX CD

The following appendix can be found on the enclosed cd:

- Appendix 1 - Abbreviations (Also in print)
- Appendix 2 - The History and Current State of Chinese Outbound Tourism (Also in print)
- Appendix 3 - The research questions behind the interview guides (Also in print)
- Appendix 4 - Interview Guides (Also in print)
- Appendix 5 - Interview transcriptions and soundfiles
- Appendix 6 - Meaning Condensations

Catering to the Dragon



Along with its economic development Chinese outbound tourism has grown tremendously in recent years, making China the biggest tourism generating country in Asia and one of the biggest in the world, while still expanding. This growth has made China an interesting market for tourism industries around the world and Denmark is not an exception.

Yet, in academic research and mainstream journalism it is often argued that there are unique wants and needs that a destination has to cater to in order to be “China ready”. This raises a number of questions in relation to the “China readiness” of the Danish tourism sector and the following three act as the basis for this thesis:

What is needed for the Danish tourism sector to be “China ready” and does the Danish tourism sector currently fulfil these demands?

- *What characterises Chinese tourists, what motivates their travel decisions and how can the Danish tourism sector attract them?*
- *What is the Danish tourism sector’s understanding of incoming Chinese tourism and what visions and strategies does this understanding generate?*

16 qualitative interviews, four with Chinese outbound tourism experts and 12 with representatives of the Danish tourism sector as well as an extensive review of more than 30 academic articles on Chinese outbound tourism forms the empirical base of this thesis. This data was investigated using a theoretical framework that consists of push and pull theory, SWOT theory and theory on strategies and visions.

The analytic part of the thesis begins with an analysis and discussion of the literature review seen in relation to the perspectives of four experts on Chinese tourism. The results of this analysis is then included in an analysis and discussion of the Danish tourism sector’s understanding of incoming Chinese tourism, before the analysis is concluded with a discussion of the Danish tourism sectors strategies and visions in relation to incoming Chinese tourism.

The broader conclusion to the thesis is that for a tourism sector to be “China ready” it needs to be “China invested” and for the Danish tourism sector to be so, it needs to have a stronger focus on the Chinese market including stronger determination in terms of which groups it wants to attract and better cooperation in terms of reaching this or these segments.