Saimaa University of Applied Sciences
Faculty of Tourism and Hospitality, Imatra
Degree Programme in Hotel, Restaurant and Tourism Management

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Applying collaborative marketing to successful promotion of Russia as a destination for Chinese tourists

Thesis 2016

Abstract

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The objective of the study was to contribute to the understanding of how to promote Russian tourism destinations to Chinese market and how collaborative destination marketing could be applied for this purpose. Part of the work was commissioned by the Travel Association "World Without Borders" with headquarters in Moscow, Russian Federation.

Data for this study were collected in three stages. The information was gathered with desk research, visitor survey in a form of self-administered questionnaires and a semi-structured interview presenting a case study.

The results of the study show that for maximum value and return on investment three tourism destinations across the globe successfully applied collaborative destination marketing to Chinese market. A case study indicated that Russian tourism professionals are also potentially looking forward to collaboration on Chinese market. Based on the findings of the study, it can be concluded that successful destination marketing to China builds on comprehensive visitor research and subsequent data-driven segmentation of the market. The research findings of Moscow Chinese visitor survey can be applied to identify target segments in Chinese outbound tourists to Moscow and prepare a marketing strategy for the Chinese market. Further studies of Russian destinations, their products, image and competitive advantages are required to develop the strategy.

Keywords: collaborative destination marketing, Chinese outbound tourists, market segmentation, visitor market analysis, competitive analysis

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1 Introduction

The thesis investigates how the concepts of collaborative destination marketing and market segmentation could be applied to the tourism industry of Russia, home country for the author of the thesis. The focus of the work is placed on a specific market – China.

Chinese outbound tourism is recognized as prospective and value generating market worldwide. In the recent years the number of tourists from Peoples' Republic of China going abroad has been constantly increasing. According to China Outbound Tourism Research Institute (2015), China had 120 million outbound visitors and the total of 104.5 billion US dollars spent abroad in 2015. These figures constitute, respectively, 12% and 16.7% increase from 2014. The growth of Chinese outbound tourism has also been recorded in Russia where China has recently become the leading market in terms of tourist arrivals.

At the moment when this thesis was written, the concepts of destination management and destination marketing had not yet been fully integrated in the tourism industry of Russia. However, representatives of local tourism businesses and their Chinese partners have recently agreed that Russian tourism destinations need better marketing (IV Russian-Chinese Tourism Forum 2016).

The objective of the thesis is to contribute to the understanding of how to market Russian destinations to Chinese tourists and how collaborative destination marketing can be applied for this purpose.

The study poses three major questions:

1. How has collaborative destination marketing targeted at Chinese market been initiated and implemented in the world?
2. What is the profile of Chinese visitors to Russia and which of them could constitute the most attractive target segment for destination marketing?
3. What attitude do Russian tourism industry professionals working with Chinese market have towards collaboration in tourism?

To answer these questions, firstly, important theoretical concepts of destination management, destination marketing and market segmentation are outlined in Chapter 2. Destination marketing models by A. Morrison (2013) were used to define the focus of the thesis work within a framework of strategic destination marketing planning process. An overview of previous studies of Chinese outbound tourism is given in Chapter 3. These chapters provide a theoretical base for the research in the empirical part of the work.

Chapter 4 presents the details about Russian destinations for Chinese tourists and introduces the partner for the thesis work. In chapter 5 research methodology of the work is described. Chapter 6 followed by a conclusion gives the analysis of results.

A combination of quantitative and qualitative research methods is used in the thesis work. The research consists of three parts; each of them gives an answer to the relevant research question of the thesis. The first part presents a desk research based benchmarking exercise. It compares collaborative destination marketing practice targeted at Chinese market in three destinations. The second part is a "Visitor profile survey". It was carried out in form of questionnaires for Chinese visitors to Moscow that identifies characteristics of the guests, their travel behaviour and satisfaction with the destination. The third research part is a semi-structured interview with a member company of Russian "China Friendly" certification programme for tourism industry. The analysis of the interview presents a case study on local company's opinion about the existing collaborative efforts in Chinese-Russian tourism. Answers to the research questions and their careful analysis might serve as a foundation for planning a strategic destination marketing campaign aimed at Chinese market.

Theoretical framework on which the thesis is based includes collaborative destination marketing and principles of market segmentation. The concept of collaborative marketing has been widely discussed lately in various international tourism publications such as "Tourism marketing: a collaborative approach" (Fyall & Garrod 2005) and M. Murdaugh's article on "consolidated approach to marketing" (Harrill 2005).

Different current publications on Chinese tourism phenomenon such as Hotels.com annual reports (2014, 2015 and 2016) and Oxford economics report (2014) were analyzed to summarize Chinese tourists' characteristics. A study by Jørgensen and Ren (2015) and publications of China Outbound Tourism Research Institute were especially helpful sources that highlighted the importance of introducing a balanced approach to

Chinese market and recognizing the difference between Chinese tourists rather than regarding them as a homogeneous group.

Literature about research methods helped the author to select the most suitable ways to collect and analyze data. For the benchmarking exercise the author studied various works on strategic benchmarking for tourism destinations such as the one by Luštický & Kincl (2012) and a best-practice study by Wonderful Copenhagen (2013). For the visitor profile survey and the case study lecture materials from Saimaa University of Applied Sciences were used. In addition, some of models and suggestions for applied tourism research by destination management organizations Visit Scotland and Destination British Columbia were considered.

2 Destination management and marketing

2.1 Key concepts defined

When approaching the topic of destination management and marketing it is important to define a concept of destination first. Destinations are geographic areas that have administrative boundaries where tourists can find overnight accommodation. Larger destinations, such as Russia, contain numerous smaller ones, such as regions, cities and even separate visitor attractions (Kotler et.al. 2010, p. 504). A national example could be, for instance, Veliky Ustyug – Great Ustyug – the residence of Father Frost, the Russian Santa Claus.

For social sciences, a destination is more than a geographical place – it is an amalgam of products, services, natural and human resources, elements of infrastructure that is able to attract visitors to the place (Manente and Minghetti 2006, pp. 229-231). From now on, the term "**destination**" will refer to a system of tourist products that unites a wide range of stakeholders including, but not limited to, actual and potential tourists, public administration, private sector enterprises and the host community (Manente and Minghetti 2006, p. 230).

Characteristics of a destination, apart from the ones already mentioned, are: a coordinating organizational structure to manage the destination; special laws and regulations to control different aspects of tourism and presence of tourism marketing efforts. Moreover, a destination is characterized by an image of the place existing in the minds of tourists and local community. (Morrison 2013, p. 4.)

The main objective of the **destination management** is to manage and support the integration of the destination mix (attractions, events, facilities, and transportation, infrastructure and hospitality resources) and tourism stakeholders through suitable policies and actions. Destination management is accomplished through specialized **destination management organizations, DMOs**. (Morrison 2013, p. 4.)

Morrison, (2013, pp. 6 – 7) the author of the comprehensive study of destination management and marketing, lists six different roles of DMOs originally identified by the United States-based Destination Consultancy Group. These organizations are formulating plans for tourism and coordinating the efforts of all stakeholders towards achieving the goals stated in the plan. DMOs are responsible for long-term and short-term planning for tourism and research. They are also planning and ensuring the development of physical products and services of the destination. Another task of DMOs is related to marketing: positioning and branding the destination, selecting the visitor markets with the largest potential and marketing the destination to them. Partnership and team building is another essential role of DMOs: these organizations foster cooperation among government agencies and within private sector and build teams to accomplish specific goals. Finally, DMOs are responsible for involving local community leaders and residents, continuously monitoring attitudes towards tourism.

Thus, the purpose of DMO activity is to meet the needs of different categories of customers, combine private profit and general economic development with the preservation of host community's identity for the sustainable development of the destination (Morrison 2013, p.7). The thesis focuses on the destination marketing aspect and underlines the importance of partnerships and cooperation, since promoting a destination is always a team effort.

Destination marketing is a continuous process of planning, researching, implementing controlling and evaluating targeted programmes that aim to satisfy the needs of destination visitors as well as DMOs' goals and objectives. Marketing programmes implemented by DMOs depend upon the joint efforts of many other organizations within a destination. (Morrison 2013, p. 9.) The following examples can illustrate the concept of collaborative destination marketing: joint promotion campaigns, participating in cooperative programmes for trade shows, organizing familiarization trips to travel agents, to name a few (Wang 2011, p. 259).

In the marketing planning process, stakeholders can achieve their objectives more effectively if they recognize their interdependencies. Strategic planning is more difficult for the private sector in the absence of input from the public sector and vice versa. To manage the complexities and incoherencies of a destination, all parties should collaborate rather than compete. (Fyall& Garrod 2005, pp. 284-289.) The next subchapter takes a closer look on challenges and benefits of building partnerships within the collaborative approach to destination marketing.

2.2 Collaborative destination management and marketing

Since the term "collaboration" is used quite abundantly on the pages of the report, it is important to define what is understood under it in the course of this thesis and the relevant theoretical framework. Partnership, collaboration, cooperation and alliance are used as synonyms in the thesis work to define people or parties working together to achieve the same goals (as defined, for example, by Cambridge dictionary). A more specific definition for tourism domain was adopted by Jamal and Getz and is given here as quoted in the work by Fyall and Garrod (2005): *Collaboration for community-based tourism planning is a process of joint decision making among autonomous, key stakeholders of an inter-organizational, community tourism domain to resolve planning problems of the domain and/or manage issues related to the planning and development of the domain* (Fyall & Garrod 2005, p. 136 after Jamal & Getz 1995, p.188).

Morrison (2013, p. 191) gives a definition of partnership from a DMO viewpoint: *a synergistic relationship between a DMO and other organizations or individuals within or outside of the destination*. Simply put, synergy means that two or more entities can achieve more when they work together than they could separately and individually. The essence of collaboration in tourism is, arguably, the best depicted by Fyall (2011) in "Destination brands: managing place reputation": the need to collaborate, work together, is not unique to tourism – but the interdependency of different actors is something related particularly to the tourism field (Fyall 2011, p. 92).

At this point, it is worth returning to the concept of destination as a complex system of products, services and different stakeholders. The destination product contains multiple components offered by numerous suppliers. Consumer's perception of a destination is influenced by the image of the destination which develops from the destination's identity as well as marketing strategies of local actors (Manente & Minghetti 2006, p. 231 after Gartner 1989 p. 16-20). The image should be consistent with the product mix of the destination to appeal to different market segments: customers of the destination product do not have the same expectations, perceptions and desires (Fyall & Garrod 2005, p. 284). Thus, multiple suppliers produce multiple meanings to multiple markets and segments (Fyall 2011, p. 94). Fragmented nature of the tourism product is the reason why cohesion is difficult for the main stakeholders, public and private sector as well as among private enterprises.

The dynamics of the industry development produce new challenges: for example, even greater emphasis on strong brand image for destination's success for its key target segments (Fyall & Garrod 2005, pp. 286-287). To create a powerful tourism brand, all stakeholders should be able to not only produce marketing messages of good quality –

but also guarantee the consistency between different messages they send out about the place (Anholt 2011, pp. 24-25).

Harmonizing the way all companies and organizations of a destination do business and sell their products helps to build a powerful competitive identity. If all are telling the same believable, interesting story about the destination, be it a country or a city. the destination can control its international image with more success. (Anholt 2011. p. 25)

Several benefits that destination collaboration can bring to stakeholders are given below; the list is not inclusive and can be continued further, depending on the stakeholders' goals. Firstly, working together stakeholders are able to serve customer needs better: consider destination wide reservation systems and two-way dialogue with customers made possible with technological collaboration. Secondly, greater industry standardization becomes easier to achieve. Thirdly, collaboration facilitates efficient and effective use of resources for mutual benefit. For example, partners from different cities – or even countries – use the pulling of funds to increase a total budget amount which allows them to participate in travel shows in long-haul markets, such as China, which they could not have afforded by themselves. Another benefit of collaboration is related to image aspect. Best Cities Global Alliance can serve as a perfect example within a business segment. Moreover, collaboration encourages partners to increase a pool of expertise and to enhance organizational learning. Sharing information is also easier in collaboration. One example could be the Great Britain Tourism Survey that was sponsored by several British cities. Many other opportunities exist such as entering new markets, networking and encouraging stakeholder support, information gathering and monitoring market trends. (Anholt 2011, Fyall 2011, Morrisson 2013; Wang 2011.)

Despite the evident benefits of destination collaboration there is a lack of such practice in the world. The reason for that is often the general mistrust among partners due to the absence of a structure that would move the common project forward, inability of certain stakeholders to recognize potential benefits of collaboration and competition between municipal authorities that administer separate geographical regions of the destination, which leads to inertia. Some attractions remain disinterested in working closely together with others because of their personal success in the marketplace. There are various other excuses of political, economic or even interpersonal nature. (Fyall& Garrod 2005, p. 290.)

Nevertheless, destination partnerships bring valuable opportunities for destinations. One example could be a joint destination product development: for example, in attempts to develop summer sport activities Visit Finland implements “The Outdoors Finland” Umbrella Programme. This is a development project operating in four bordering regions of Finland: Päijänne Tavastia, Tavastia Proper, Kymenlaakso and Uusimaa. The project aims to improve the quality and accessibility of routes for cycling, trekking and canoeing for independent tourists from both Finland and abroad. (Visit Finland; Outdoors Finland, p. 6.)

Another win-win suggestion is a joint product marketing and promotion. For example, a four-year collaboration agreement signed by Tourism Queensland, Australia and Singapore Airlines in 2011 allowed them to fund a number of joint campaigns to bring more visitors to Queensland through Singapore Airlines flights to Brisbane (Morrison 2013, p. 193).

To sum up this subchapter, collaborative destination management and marketing should, above all, bring value to the destination and encourage its sustainable development. A failure to implement collaborative approach to marketing within a destination and to balance interests of the stakeholders and the environment deters destination development (Fyall & Garrod 2005, p. 287). Integrated destination management and marketing framework compares destination to a living system, reminding that a planning-marketing orientation should not only satisfy needs of individual actors but also sustain civic energy and social cohesion. The end-objective is to prove value to visitors as well as to the community. (Jamal & Jamrozy 2006, pp. 168-169.) Well-planned co-ordination of the destination management and marketing actions and integration with wider economic and society development plans is vital to enhance long-term competitiveness of the destination (Fyall 2011, p. 101).

2.3 Research for destinations

Tourism markets are dynamic and to meet the needs of the changing markets tourism products must change. Destinations should be aware of the new markets and of ways to serve them with the existing tourist products. In other words, to stay competitive, tourism organizations need information. (Kotler et. al. 2010, p. 526.)

One should not spend a euro on marketing until visitor markets and their potentials are clarified. It is important for every destination to know their markets and monitor the popularity of their various attractions by determining the number and type of tourists attracted to each. (Murdaugh 2005, pp. 31-32.)

Market and marketing research are the critical first steps to define the scope, size, economic well-being and customer profile of the destination. **Market research** allows to quantify and value the economic impacts of tourism to a community by estimating visitor impact from tax revenues and jobs generated and/or sustained by destination visitor spending. **Marketing research** identifies consumers by demographic (age, income, educational level) and psychographic (interest, attitudes, desires) profiles. (Murdaugh 2005 p. 31.)

Tourism marketers have a plenty of research tools at their disposal to gather information required for the marketing planning process. Methods selected for the thesis will be discussed in chapter 5 while the next subchapter outlines the destination marketing planning process.

2.4 Destination marketing planning process. Situation analysis

Over twenty years of destination management practice in several countries have shown that destination marketing planning requires a systematic step-by-step approach (Morrison 2013, p. 72). This subchapter's assumptions are built on a destination marketing planning model mentioned in the work of Morrison (2013, pp. 74 – 108) which the author states as tried and tested process.

The model is consistent with general strategic management principles as it breaks down the process into consequent steps (Figure 1). Strategic decisions for destination marketing are usually defined three to five years into the future, while tactical ones deal with more short-term marketing objectives and planning is done one to two years ahead.

After having vision, mission and goals defined, it is logical to move on to tactical steps and plan marketing activities and programmes triggered by the destination marketing goals. Each tactical step produces an answer to the corresponding of the five questions helping to build a strategy: (1) Where are we now? (2) Where would we like to be? (3) How do we get there? (4) How do we make sure we get there? and (5) How do we know if we got there?

Research and planning happens on the first two steps: analysis of acquired information helps to develop marketing objectives and write a detailed marketing plan to be implemented (step three). The last two steps evaluate the implementation of the marketing plan to justify expended resources.

Figure 1 Destination marketing planning process (after Morrison 2013)

Research that was carried out in this thesis contributes to "Where are we now" stage – or "Situation analysis" as it is referred to in other publications, for example, Heath & Wall (1992, pp. 11 – 13). This step will be now considered in more detail. The work does not cover other steps of the planning model but their interconnection with Situation analysis (Step 1 in the marketing planning model) is presented in Figure 2.

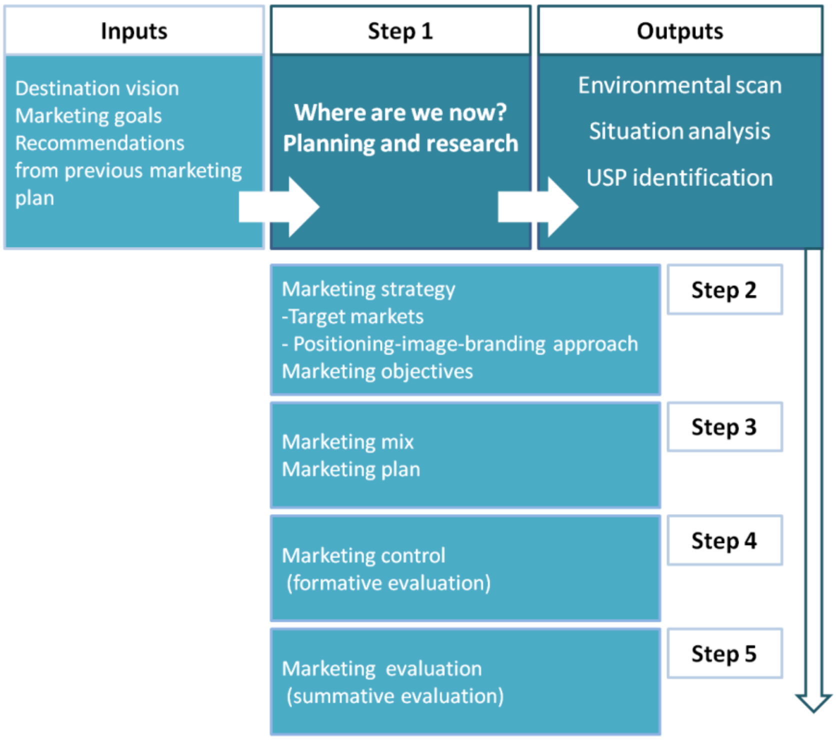

Figure 2 Destination marketing steps (after Morrison 2013)

Situation analysis provides destination marketers with necessary information about the destination's environment and resources the destination has (strengths) or lacks (weaknesses) (Heath & Wall 1992, p. 11). Morrison expresses the same idea with different terms, referring to the analysis of the external environment as **environmental scan** and to destination resources analysis – **situation analysis**.

Environmental scan identifies trends, opportunities and challenges in the marketing environment and how different environmental factors – political, economical, social, technological and legal – might affect the destination.

Situation analysis includes analysis of destination and its products, competitive analysis, visitor market analysis, marketing position/ destination image analysis, previous marketing plan analysis and resident analysis.

The outcome of all these analyses is to establish destination's competitive advantages or unique selling proposition and to give an idea of how to reflect these in marketing strategy in the next steps of destination marketing planning process.

2.5 Visitor market analysis. Segmentation

One of the elements of situation analysis is visitor market analysis. It is essential to know which specific market segments come to visit a destination to produce marketing programmes targeted at the key visitor segments – the ones that constitute the greatest potential.

Market segmentation *is the attempt to pinpoint specific customer group within larger undifferentiated populations, in order to develop and implement marketing programmes specifically designed for their needs* (UNWTO 2007, p.3). The reason behind segmentation is that it would be impossible to afford marketing programmes to satisfy the needs of the entire market. In this scenario, promotional messages are very likely to reach people that show little or no interest to the destination's product in the foreseeable future which is a waste of resources and time. Moreover, promotional messages appropriate for some groups of people might be completely unattractive for another group as customers have different needs and values. (UNWTO 2007, p. 3.)

When market is divided into segments, it is easier to customize products and product positioning; understanding of the target audience also makes media choices more cost-efficient. In essence, market segmentation helps to maximize marketing return on investment, understand the visitor market better and communicate with destination's customers more effectively. (UNWTO 2007, p. 4.)

Dolnicar (2008) discusses approaches to segmentation. She states that market segments can be derived in many different ways but can however be classified as either commonsense segmentation (a priori) or data-driven segmentation (a posteriori).

Commonsense segmentation establishes criterion that will produce a potentially useful grouping in advance, before the analysis is undertaken (a priori). In the case of **data-driven segmentation** destination management relies on the analysis of the data (data-driven) to gain insight into the market structure; the decision which segmentation base or grouping is the most suitable one is taken after the analysis (a posteriori). (Dolnicar 2008, p.6)

Typical examples of commonsense segmentation approach would be to profile tourists based on their country of origin, their preferable activity (eco tourist, culture tourist) or the amount of spending (big-spenders). For example, like in the case presented in this work, destination management wants to attract tourists from China and selects country of origin as the segmentation criterion. Then, several tests with the help of statistic software are usually made to test whether Chinese tourists are significantly different from other segments. Finally, it has to be evaluated whether or not the market segment is attractive enough, and in case of the positive answer destination management can proceed to customize the service and develop targeted marketing activities to best suit the segment's needs. (Dolnicar 2008, pp. 6 – 12)

In data-driven segmentation the basis of segmentation is not determined beforehand but emerges from the research survey results, for example, from visitor surveys (UNWTO 2007, p. 6). This is the exploratory process and is closely linked to the data structure. Clustering algorithms are used to place respondents giving similar answers to several questions in one group or segment. Some algorithms, such as k-means clustering, allow establishing the desirable number of segments which makes clustering larger data sets more quick as not so many distance computations have to be done. The stability of formed clusters is checked to inform whether or not the true clusters were revealed and if there are better grouping solutions available. (Dolnicar 2008, pp. 13 – 15.)

A combination of both segmentation approaches is also possible. For instance, tourists can be first split into groups based on their country of origin and then within these groups it is possible to specify smaller segments based on different travel motivation. (Dolnicar 2008, pp.3 – 4.)

When all segments are identified, marketers need to decide which of them offer the best marketing opportunities (Step 2 in the Destination marketing, see Figure 2). A marketing mix strategy is then developed for each target segment (Step 3) (UNWTO, 2007).

Two examples show how different destinations segmented their tourist markets. One example is five segments for the UK market which were identified in 2014 by Visit Scotland. The organization claims that the following segments *will provide the best return on investment*: Adventure Seekers, Curious Travellers, Engaged Sightseers, Food-Loving Culturalists and Natural Advocates (Visit Scotland 2014). This is an example of lifestyle segmentation.

Another example shows how Destination British Columbia used a two-step segmentation. Firstly, they identified short-haul and long-haul market segments, secondly, they identified three groups based on their motivation: Authentic Experiencers (Older travellers prioritizing engagement with locals), Free Spirits (Younger, adventurous thrill-seekers) and Cultural Explorers (Avid, open-minded "immerse themselves" travellers).

The next chapter looks into the Chinese visitor market trends. Based on secondary research materials, the chapter summarizes relevant studies of the Chinese market and potential of this market development.

3 Chinese Outbound Tourist profile

3.1 A growing market

China is the most populated country in the world. Its population, based on the latest estimations (on July 2016), is 1 382 514 923 or 18.72 per cent of the total world population. The population continues to growth at a current yearly rate of 0.46 per cent. (Worldometrics 2016.)

Recently the Chinese have become the world's most prolific travellers. In 2014 China outran the United States for outbound tourism numbers and highest international spending in the world. In 2015 Chinese spent more than 200 billion dollars on tourism related activities and this number is expected to double by the year 2020. (Resonance Consultancy 2016, p. 2.) It is forecasted that by 2023 annual arrivals from China will grow to the total of nearly 97 million at an average annual growth rate of 5.1% (Oxford Economics 2014 p. 3).

These numbers are especially impressive considering that for a long time governmental policy of the country did not let its citizens to travel outside the country except for official or business trip purposes. In the course of political and economic reforms of the 1980s-1990s tourism industry embarked on the path to rapid development. Tourism was declared as a new focal point of China's national economic growth at national and local levels. Chinese citizens got the opportunity to leave the country for leisure purposes in the early 1990s. (Breda & Rodrigues 2014, p.3; Liang et. al. 2003, p. 6.) First, such visits were limited to a few countries in Asia; at the end of 2000 the number of officially "approved destinations" was 15. Currently, the number of destinations is more than a hundred (Arita, La Croix & Mak 2012, p. 6).

3.2 Popular travel destinations

Phenomenal economic growth over the past decade and the expansion of China's middle class made long-haul travel possible for more Chinese households. In 2003, roughly 6 million Chinese households could afford international travel (with annual income above 35 thousand dollars considered as a threshold). This number rose by 21 million in the next ten years. By 2023, additional 61 million households will be able to travel overseas. (Oxford Economics 2014, p.3).

Asia-Pacific region remains the most popular choice of destination for Chinese outbound tourists; however, with the growth of income, Chinese tourists gradually tend to choose middle and long-distance travel, first to Europe, then to America, Oceania and Africa. (Ipsos 2015, p.2.) Statistics on Chinese outbound travel indicate that cities are the primary destinations of Chinese tourists. Excluding travel to Special Administrative Regions of China (SARs), 70 per cent of outbound tourism is to major cities. (Oxford Economics 2014, p.10.)

Data from Ipsos for the year 2014 – 2015 shows that the most popular cities for a long-distance travel for Chinese tourists were Paris, London and Sydney both as the first and repeat trips. Other cities from the list were Sydney, Los Angeles, Rome, New York, Venice, Milan and Dubai (Ipsos 2015, p. 2).

Chinese tourists tend to make their first trip overseas to the most popular Western European countries, such as Germany or France. After that they are ready to explore smaller Eastern European countries as repeat travellers. For example, Czech Republic has recently attracted Chinese tourists by its unspoiled nature sites. (Yang 2016.)

In 2016 Resonance consultancy analyzed 1.2 million reviews of 94000 tourism attractions on Qyer.com which is a Chinese analogue of Trip Advisor. Users of Qyer.com are usually 18 – 35 years old, well-educated and experienced travellers, so the data obtained from the research can reveal travel preferences of the young generation of Chinese travellers. The most popular destinations for young Chinese tourists were identified by the number of positive reviews on Qyer.com. France appears to be their favourite destination outside Asia (ranks third on the list); Russia is also included in the top-20 destinations (on the 20th place) (Resonance consultancy 2016, pp. 6 – 8.)

3.3 Chinese market profile

Multiple previous studies of Chinese outbound tourism regarded this source market as a homogenous segment, probably due to the fact that Approved Destination Status scheme was at first restricted to all-inclusive package tours. (Prayag et. al. 2014, p. 8.)

However, as claimed in several recent studies (Arlt 2015, Jørgensen & Ren 2015) nowadays it is important to identify and understand different Chinese outbound market segments – instead of studying *the* Chinese tourist – and communicate destination product to them differently. This thesis supports this line of thinking and tries to avoid a tempting approach to consider Chinese tourists as a "different other" solely on the basis of their common cultural background. A few suggestions on various segments of Chinese tourists from the recent research will be made in the following subchapters.

3.3.1 Segments by the trip organization preferences

First-time Chinese leisure travellers opt for **package tours** as a more economical alternative to independent travel. New travellers are more comfortable with the guide speaking a familiar language and with a group of fellow travelers. Large proportion of the forecasted increase in Chinese outbound travel will still be made by first-time travelers. (Oxford Economics 2014, p.17.)

Second-time travelers or those with higher income prefer **independent travel** as it brings more flexibility. Both Oxford Economics research (2014 p. 17) and China Outbound Tourism Research (2015) mention that package travel should be considered by destinations as a gateway for individual travel. According to COTRI ITB convention paper, "second wave" tourists are ready to spend larger amounts of money for authentic experiences, niche topics, themed tours and activity based trips. This segment is more confident and demanding and has a growth potential. (COTRI 2015.)

Figure 3 illustrates future travel intentions of Chinese outbound tourists in terms of their preference of travel organization. The data was obtained from a market research conducted by Ipsos for World Tourism Cities Federation in 2015.

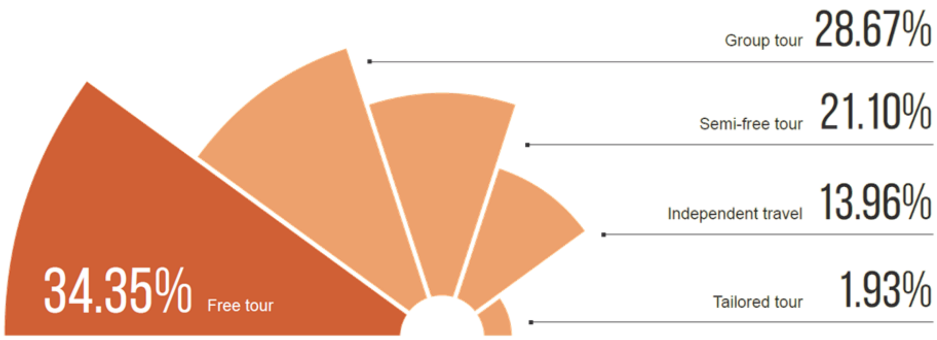

Figure 3 Future trip intentions (Ipsos 2015)

Analyzing the chart, one might be confused with the two terms “free tour” and “independent travel”. The year 2015 identified the blurring of clear division between the trips organized by tour operators and self-organized visits. There is a tendency among Chinese travelers to travel independently but having the tickets and partly necessary tour arrangements booked for them via specialized online platforms that are becoming widespread in China. (Arlt 2015.) In tourism such form of travel is called **FIT** (Foreign, Free or Flexible Individual Tour). Free tour travelers do not chose a packaged tour but have their trip customized by a travel-selling professional. (Figueroua 2016.) There are also **semi-FIT** travelers – small groups of Chinese tourists who apply for individual visas (Yang 2016).

3.3.2 Significant socio-demographic segments

Recent market studies (Integreon 2014, p.12, Hotels.com 2015, EU SME 2015 p. 20) revealed three most significant socio-demographic types of tourists from China. One of them is **Senior travellers**. A leading online provider of travel services in China Ctrip released the report on Chinese tourists’ vacation willingness in 2015. All respondents over 45 years old stated they were willing to travel. As disposable incomes increase, travel by the elderly is becoming more and more popular in China (Integreon 2014, p.12). Now, the over 45 age segment is the major force in group travel industry in China. By 2030, this market is expected to grow approximately seven times with 12.6 million elderly passengers travelling annually. (EU SME 2015, p. 20)

Another significant segment is **the Millenials**. Generation Y travellers, aged 18 to 35 are making more international trips. This segment of growing influence is characterised by the practice of using digital devices to plan and book their travel (instead of turning to travel agents), smart use of price comparison and loyalty programmes (Hotels.com, pp. 14 – 18.)

Finally**,** there are **the Big Spenders.** Chinese international travellers are still among the wealthiest of the country’s citizens. The average traveller’s household income is around 70 000 dollars while on average Chinese have 1000 dollars at their annual household disposal. 10 per cent of the richest Chinese citizens have their annual household income of 104 810 dollars. Travel accounts for a quarter of their total expenditures and on average they go abroad 2.5 times each year. (Hotels.com, pp. 20 – 23.)

3.4 Travel preferences and attitudes explained by culture

The table below (Figure 4) was made by the author of the thesis to summarize the culture factors that might have the influence on travel preferences of different segments of Chinese travellers.

Activity	Culture reasons	Best applicable to segments:
(1)Travel abroad in general	Status, prestige	All
(2) Group tour	Social: socialize, new connections	Young
	Social: confirm self-identity	Senior
	Social: develop existing relationships in a group	Business
(3) Shopping (for luxury)	Family values and prestige	All

Figure 4 Cultural impacts on travel decision

In the Chinese society an important perception exists that people must travel to obtain higher social status. (EU SME 2015, p.19, COTRI 2015). This remains true also among younger generation. Some travellers might feel the need for accumulating social capital to assert a new middle class identity upon returning home (Prayag et. al. 2014, p. 27).

As summarized in Figure 4, young Chinese travellers participating in group tours consider such trips as an opportunity to socialize and meet new people while older people seek means to conform self-identity. (Kwek & Lee 2010, p.7.) From the same table one can see that all segments of Chinese tourists are famous for their love for shopping, particularly, luxury products (EU SME, 2015 pp.19, 21). Apart from the aforementioned notes on the importance of prestige and raising ones' social status via travelling, there is another explanation rooted deep in Chinese cultural values. In China it is not common to label the one involved in a possession of luxury goods as a "selfish materialist", on the contrary, such behaviour is seen as a social virtue. Bringing quality goods for the family is regarded as fulfilling one's familial obligation (Wong & Ahu via 1998, p.12).

Moreover, interviews of hoteliers from Denmark note that Chinese tourists never complain during their stay. In the same study an explanation was suggested: Chinese tourists do not comment on the service as it is considered a "loss of face". (Jørgensen & Ren 2015). Despite that, it is possible to study Chinese feedback from local online sources. According to Hotels.com (2015, p. 23), 80 per cent of travellers have used an online source to book and plan their travel, compared with only 53 per cent last year. The study by Michopoulou & Moisa (2016, p.11-12) concluded that Chinese find other travelers' reviews very important trusted source to plan their own trip. Considering the fact that China is a collectivist society with its score 20/100 on individualism on Hofstede culture dimensions (2001), it is not surprising that Internet users of China value online communities where everyone can contribute their opinion. It is suggested for tourism marketers to use "we – our" message in order to reflect a sense of family and introduce loyalty schemes for Chinese guests. (Michopoulou & Moisa 2016, p.15.)

Also in accordance with Hofstede's theory (2001), China has a low score on uncertainty avoidance. This explains their preference for destination-based planning (contrasting with British way of firstly selecting a hotel). New, more independent Chinese travelers prefer to construct their journey by themselves and their planning is not detail-oriented, they are ready to change the components of their trip already when abroad. Booking process also happens not so long in advance. (Michopoulou & Moisa 2016, p.13)

To conclude the chapter, to satisfy the needs of modern Chinese travellers, especially the "second wave", more experienced ones, it is essential to treat them as international citizens but still show respect to the Chinese culture. Studies show that young travellers and independent millennial segment value high-quality service and catering for their specific cultural needs. The tendency is that the "high-quality" aspect is gaining prevalence over the "customized". (Hotels.com 2015, p.16, COTRI 2015, p.21, Prayag et. al. 2014, p. 28.)

4 The case introduction

In 2014 China has become the leader of inbound tourism to Russia from long-haul markets surpassing Germany, Turkey and the United States of America (Federal Agency for Tourism). Official statistics show that the market has been steadily growing in the recent years (see Figure 5) (World Without Borders, 2015).

Figure 5 Chinese tourists arrivals 2009-2014 (after World Without Borders 2015)

Last year's (2015) figures for 9-month period show that 583 617 Chinese tourists have visited Russia as leisure tourists, which constitutes an impressive 63 per cent increase from the same period in 2014. These positive dynamics could be influenced by the events of 2012 – 2013, the years of Russia and China Tourism. The two countries agreed to assign the year 2012 as a year of Russia in China and the year 2013 – the year of China in Russia. Various events aimed at strengthening collaboration in tourism were held, such as the First Russian-Chinese Tourism Forum in March 2012, 12-thousand kilometre long "Beijing – Moscow" car rally, Russian Tourism Road Show in Heihe and Beijing. (World Without Borders, 2014.)

Since Russia was granted Approved Destination Status in 2002, most of the Chinese tourists arrive in organized groups from 5 to 50 tourists. According to Russian-Chinese governments' agreement, participants of the organized tour can enter Russian Federation without a tourist visa and stay in the country for up to 15 days. (Laiko & Blinova 2008, p. 3, Deryabina 2016, World Without borders.) At present time, 363 Russian tour operators are entitled to provide visa-free Chinese tours (Federal Agency for Tourism, 2016).

Previous studies of Chinese outbound tourists to Russia revealed that slightly more women than men were travelling to Russia (65 per cent) and the majority travelled with an organized group tour (80 per cent) (World Without Borders, 2013). Mass tourism remains the most popular form of Chinese outbound travel to Russia. 64 per cent of all Chinese tourists who visited Russia in 2013 were arriving in groups via visa-free channel (World Without Borders, 2014). The development of independent Chinese outbound tourism to Russian destinations is constrained by the cost of getting the Russian visa. The cost of visa for Chinese tourists currently reaches 10 thousand

Russian roubles (approximately 134 euro). Moreover, the visas are valid for a single visit only and there is no opportunity to apply for multiple-entry visas. Recently both governments have started discussing the possibility to simplify the visa regime. The head of Russian Federal Agency for Tourism Oleg Safronov expressed his positive attitude towards the initiative of introducing multiple-entry visa for Chinese tourists. (Deryabina 2016.)

China and Russia have established a wide network of air routes. Chinese tourists can visit most of the biggest cities in Russia using direct flights; at present time the flight network connects 12 cities in Russia and 10 localities in China in 32 directions (World Without Borders, 2015).

Figure 6 below shows the most popular Russian destinations for Chinese visa-free tourists in 2014, according to the data from Travel Association "World Without Borders".

Figure 6 Russian destinations for Chinese tourists (after World Without Borders 2014)

4.1 Moscow as a destination for Chinese tourists

With its rich cultural heritage and diverse tourism opportunities Moscow is very attractive for Chinese tourists. The majority of Chinese tourists arriving to Moscow combine the trip with the visit of St Petersburg and capitals of different European countries. (Laiko & Blinova 2008, p. 6; World Without Borders, 2014).

One of the weaknesses of the destination is the seasonal character of its popularity among tourists, as illustrated by Figure 7. The highest share of arrivals is in July, a quarter of all yearly Chinese arrivals happen within this month, while the percentage of arrivals in winter is significantly lower.

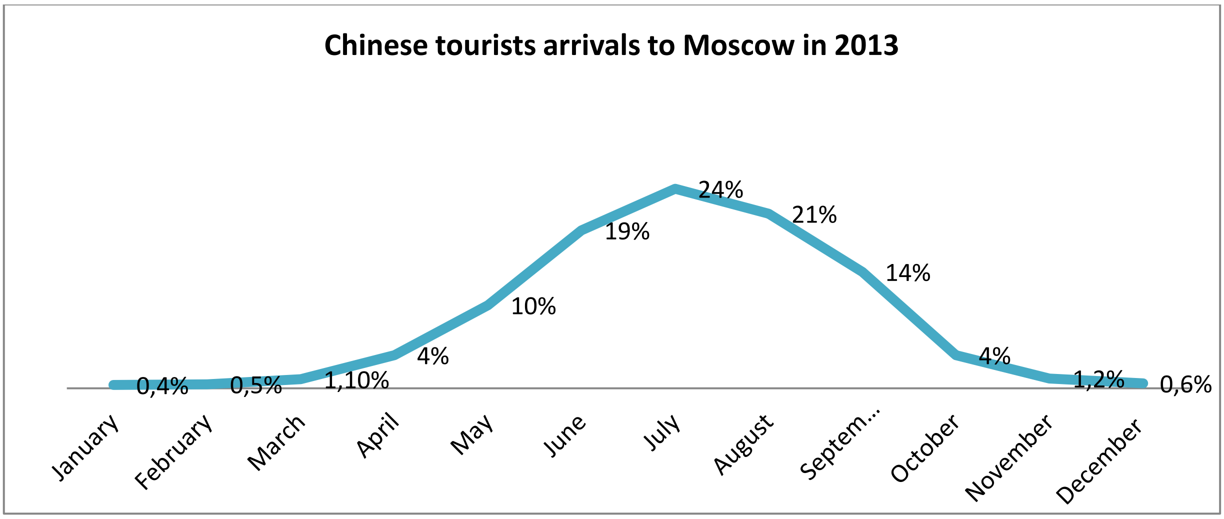

Figure 7 Chinese tourists to Moscow in 2013 (after World Without Borders 2014)

These characteristics, among others, were included in the brief SWOT analysis of Moscow as a destination for Chinese tourists (Figure 8). The notions included in the table that present specific evidence for Moscow will be marked with (M) while notions without any markings can be applied for other Russian destinations as well. These are included in order to provide the relevant context of Russian-Chinese tourism development which affects all destinations in Russia, including Moscow.

Strengths	Weaknesses
• Strong image of the city as the place representing Russia in the eyes of tourists; there are 3 UNESCO states in Moscow (M) • A tour route targeted for Chinese celebrating common Soviet past of both countries matches Chinese “Red tourism” trend (World Without Borders 2014, Vodopianova 2015.) • Local tourism businesses have started adapting their service to be “China friendly” (Pyatihatka, 2015.)	• Lack of destination marketing restrains Chinese visitors’ interest towards Russian destinations (IV Russian-Chinese Tourism Forum 2016; Lu 2014.) • The lack of Chinese speaking tourism professionals (Gorshkova 2015.) • Seasonal character of the destinations is clearly visible on the example of Moscow (Figure 7, below the table) (M)
Opportunities	Threats
• Strategic Russian-Chinese partnership, cooperation on the governmental level includes initiatives of transport and infrastructure development. (Official Internet resources of the president of Russia 2016.) • Favourable for Chinese tourists renminbi to rouble exchange rate	• Competition of local tourism providers with Chinese. Unauthorized Chinese tour guiding activity with the guides often incompetent and unknowledgeable about Russia (Egorsheva 2013.) • The absence of tax-free system in Russian legislation is an obstacle to the development of luxury product market for Chinese tourists (Romanova 2016, Russian Briefing.)

Figure 8 SWOT for Russian tourism destinations

Moscow is included in the popular 8-day tour programme designed for Chinese tourists: the “Red Route” which shows important sites of W.I. Uljanov, more famous under the name Lenin. The tour takes place in four cities: Moscow, Ulyanovsk (the birthplace of Lenin), Kazan (the city where he studied) and Saint-Petersburg; the programme includes many important cultural, historical and natural landmarks. This route emphasizes similar communist past that the two countries share while at the same time aims to inspire Chinese guests to visit other regions of Russia. The route shows them, for example, picturesque cities on Volga, the longest river in Europe – and one of the beloved national symbols – and the diversity of natural and cultural places of Leningrad Oblast. (Vodopianova 2015.)

This popular route primarily targets Chinese senior and middle-age tourists. In this regard, it would be beneficial to study the younger generation's opinion about Moscow as a tourist destination to find out favourite places and products of the young Chinese tourists.

4.2 Modern image of Russian destinations in China

Although the author of the thesis work could not find any works devoted to Moscow in the eyes of the young Chinese generation, an interesting study (Lu 2014) looked into Chinese blogosphere and social media reflecting the image of Saint-Petersburg in modern China. Some of the popular topics discussed on local social platforms might give a hint about the image of Russia in general. For example, theme photography is popular, especially natural and cultural landscapes, architecture, ballet and dance stories, beauty of Russian women. Moreover, Chinese like to read fragmented city stories and events as perceived by Chinese living in Russia during their studies or work. Another popular topic is culinary explorations with highlights on Russian ice cream and beverages. Other topics attractive to Chinese readers are related to military image and aesthetics of Russia and daily life in China and in Russia compared – the latter can be seen mostly in student blogs.

The study concludes with the notion that Saint-Petersburg has gained attention in Chinese media; however, the city is conceding other large European cities in popularity. The lack of information – from practical issues (safety, trip organization) to contemporary culture news – provides an obstacle to the further development of the image of the city as unique, friendly and powerful. (Lu 2014.)

The need for more extensive destination marketing has been recognised not only in individual studies but also on the much broader scope; for instance, on the IV Russian-Chinese tourism forum that took place in March 2016 the same topic has been highlighted both in the speeches of Chinese tourism representatives and their Russian partners (IV Russian-Chinese Tourism Forum 2016).

To improve the situation, the representatives of Russian regions and individual tour companies participate in large tourism exhibitions in PRC: for example, Russian stand on BITE exhibition in May 2016, road show series "Visit Russia" during which regional tourism authorities present iconic Russian landmarks and sights and tour operators suggest their products. Apart from that, regional authorities and tour operators practice familiarization trips and organize annual press-tours for Chinese media. Since October 2015 the National Tourism Office of Russia “Visit Russia” operates in Beijing. Another office will be opened in Shanghai in 2016. (Pyatihatka 2016, for Southern China).

4.3 Travel Association “World Without Borders”

The development of Russian-Chinese Tourism is the mission of the Travel Association “World Without Borders”. The Association plays an important role in collaborative destination marketing to Chinese market and it is also a partner organization for the Chinese visitor survey conducted in the thesis. This subchapter is devoted to the goals and activity of the Association on the Chinese market and its “China Friendly” project in particular.

During her placement at the organization the author of the thesis work had an opportunity to talk with Association’s members and study the company’s information materials. These personal discussions and excerpts from Association’s website serve as the sources of information for this subchapter.

The Association is a non-commercial partnership for the development of inbound tourism in Russia from Asia Pacific region countries. It was founded in 2002 by the largest Russian inbound tour operators “Academservice”, “Intourist” , “KMP” and “Express Line Travel” with the purpose of joint promotion of Russian national tourist product to international markets and development of Russian-Chinese tourism. The Association is the member of UNWTO, the leading international organization in tourism and travel field.

Since 2002 Travel Association “World Without Borders” has been consistently developing interaction and partnership with National Tourism Organizations of the world and their representatives in Russia, international professional tourism associations of China, Japan, Turkey, Finland, Poland, Korea, India, Iran and several other countries. Since 2015 the Association puts the focus on China as the largest source market for inbound tourism to Russia and builds its activity around this market segment.

Today the Association unites more than 170 tourism companies that work with Chinese market: inbound and outbound tour operators, hotels, museums, shopping centers, airports and airlines, financial and insurance companies. The companies represent more than 26 regions of Russian Federation.

The primary goals of the Association are to develop and strengthen international cooperation with tourism organizations of Peoples' Republic of China, promote Russian-Chinese tourism and national tourism product for Chinese market, encourage investments in tourism and coordinate the collaboration of Travel Association's members and governmental officials.

In 2007 the Association signed a Partnership Memorandum with Chinese Travel Association. This was an important event for the development of Chinese-Russian collaboration. Since then, both countries are committed to the continuous improvement of safety and quality of Russian and Chinese tourists' experience.

The need for special attention to the Chinese market was revealed at the beginning of 2014 when tourism business representatives had to face a rapid increase in the number of Chinese tourists and reported their lack of knowledge of this market. The need for understanding Chinese tourists and adapting the service to their preferences caused the Association to initiate additional projects targeted at Chinese tourism market.

The Association manages different projects devoted to Russian-Chinese tourism. These include: organization of visa-free group tours, management of a safety and insurance centre for tourists in collaboration with the biggest Chinese insurance company "China Life" and management of Russian destination marketing tourism office "Visit Russia" in China with particular focus on B-to-B marketing. This initiative is supported by the Russian Federal Agency for Tourism. Since 2012 the Association has been organizing the annual Russian-Chinese Tourism Forum which serves as the platform for tourism discussion and the meeting point of Chinese and Russian tourism business experts.

The Association is responsible for the development of the partnership network with Chinese national and regional authorities and promotion of Russian national tourism product at professional tourism exhibitions in China, including presentations of national tourism resources in Beijing, Shanghai, Kunming, Guangzhou, Hong Kong and Taipei. This is done with distribution of information and marketing materials about the Association and its members' activity in Chinese via web pages of Russian Council in China. The Association curates the publication of "Russia Today" magazine in Chinese language devoted to Russian tourism in partnership with Russian Council in PRC. The magazine targets tourism field professionals; it is distributed via tour operators, official representatives of Russia in China and at the international tourism fairs and exhibitions.

The Association also organizes of tourism road show series “Successful Russia” in Asia-Pacific Region in 2014. The road show project aimed at strengthening Russian tourism image in Asian tourism markets, including China; it was carried out in public-private collaboration with governmental authority Federal Agency for Tourism.

In 2015 the Association launched its new project “China Friendly”, an official voluntary certification of tourism service providers. Hotels, restaurants, tour operators and museums that satisfy a list of established quality criteria are granted the “China Friendly” certificate and get promoted on the Chinese market.

The most recent project of the Association is the accreditation of professionals accompanying tour group, which is a new profession in Russian tourism field (from 2016 onwards). This project aims to solve the problem of illegal and incompetent tour guiding practice with new established standards of quality. The system divides responsibilities of the professional tour guides and persons “accompanying Chinese group tours”.

The projects of the Association have recently gained attention in Russia and abroad. In order to establish “China Friendly” quality standards the Association consulted Chinese experts and contacted several similar programmes in the world such as “China Friendly International” in Spain, “China Friendly Italy” and Chinese “the Welcome Chinese Standard Certification”.

Travel Association “World Without Borders” and its projects on the Chinese market provide a good example on collaborative destination marketing efforts in Russia in line with the aims of the thesis work. Although the Association is not a Destination Management Organization, destination marketing is an important part of its activity. Moreover, the Association works with public and private organizations and emphasizes the need for collaboration and joint promotion of national Russian tourism product to the China market.

5 Research methodology

5.1 Competitiveness study: best-practice benchmarking

The first part of the research conducted in the course of the work is a best-practice benchmarking of how three national tourism organizations of the world market their destinations to the Chinese tourism market. Benchmarking is a useful tool as it focuses on the improvement of a business process by exploiting "best practices” which are the cause of best performance (Kelessidis 2000, p.3). Practitioners of the tourism field usually distinguish between benchmarking of profit-oriented tourism businesses, non-profit oriented tourism organizations and destination benchmarking (Wöber 2002, p. 10.)

One example of a recent best-practice study of the Chinese market would be the “Best Practice Study: City destinations targeting Chinese visitors” conducted by Wonderful Copenhagen (2013). While this study provides a comparison of European cities’ marketing efforts, the thesis puts an additional emphasis on the strategic dimension of marketing to Chinese tourists. The concept of strategic benchmarking has been recently suggested by several authors (Luštický & Kincl 2012, Xiang et. al. 2006) as another branch of benchmarking integrated into destination planning process. Strategic benchmarking focuses on benchmarking partners’ long-term strategy as an important element of their success (Luštický & Kincl 2012, p. 5).

The study includes elements of strategic benchmarking and attempts to trace the impact of strategic plans of the destinations on their developing relations with Chinese market. Moreover, in contrast to Wonderful Copenhagen study which refers to Chinese market as rather homogeneous, the thesis seeks to investigate how other destinations managed to identify distinct target segments within Chinese market.

The two key areas of interest of this research are (1) to identify how other destinations market themselves to the Chinese market and (2) how do their destination management organizations promote collaboration within tourism industry to meet the common goal of welcoming tourists from China. The analysis of practices (qualitative data) and metrics (quantitative data) helps to identify successful approaches to collaborative destination marketing that are applied by the “best in class” destinations. The data was collected with online desk research and was then used to select best practices that could be potentially replicated by Russian tourism industry professionals.

All data was obtained from open sources available online such as reports published on tourism boards’ websites, governmental statistics and online articles. Because of the author’s language proficiency at the time when the work had been carried out, only the sources in English language were analyzed. It is important to take this limitation into consideration as the choice of the (English speaking) destinations for benchmarking was inevitably influenced by the fact that they had more information in English available online.

5.1.1 Planning

The research process was organized in accordance with the framework of benchmarking process (see, for example, Wöber 2002). The first stage of the process is planning. In order to be selected for benchmarking exercise destinations needed to have China as an important tourism market and recognize its strategic importance on the national level. The importance of the market for each destination was analyzed by scanning national tourism board websites and reports, statistics of Chinese arrivals to the destination and keyword search through search engines by "China friendly destination" or "China ready". Moreover, the destinations had to satisfy several other criteria. Firstly, they had to be popular among Chinese tourists judging by the arrival numbers and the most attractive outbound destinations for Chinese tourists according to international surveys. Secondly, the destinations could only be selected if they were targeting Chinese market with special programmes and/or to implement national/ region-wide marketing campaigns in China or specially targeting Chinese tourists in other way. Finally, there had to be an evidence of national or regional destination management organizations communicating the importance of tourism and Chinese market in particular to the industry by providing relevant service, guidance and support for tourism professionals. Additionally, several other criteria were set as "desirable": the presence of China market service adaptation programmes, target segments identified in Chinese market and the evidence of a destination's active presence on Chinese social media.

The first selection included Australia, Canada, France, Great Britain, Italy, and the United States of America as the countries that have city-destinations that were the most popular among Chinese tourists according to the recent surveys. These countries have also been paying targeted attention to the Chinese market in the recent years with various remarkable actions. The second selection narrowed the list down to destinations that were best satisfying the selection criteria (see above) and had the largest amount of quality and recent information online, namely: Australia (responsible organization: Tourism Australia), Great Britain (responsible organization: Visit Britain) and the United States of America (responsible organization: Brand USA). These destinations are experienced in destination marketing practise and their success on Chinese market makes them the suitable "best-practice" examples.

5.1.2 Analysis

The benchmarking exercise analyzes destination marketing efforts of the five year period from 2010 to 2015. Each country's important metrics and best practice are considered. The structure is the same for all selected destinations. Firstly, several important metrics are given: arrivals from China during at least the selected time period and the share of leisure travellers from total arrivals; the share of individual versus group travellers and the information on tourist expenditure. Secondly, best practice is given in five paragraphs, namely: Principles and policies, Training and research, Industry collaboration, Marketing campaigns (selected examples) and Target group of Chinese tourists.

The final part of the analysis lists the most important conclusions. Where applicable, a comparison is done with Russia and the three analyzed destinations. Other steps of benchmarking procedure that include communication to management, improvement plan development, implementation and progress review are not considered in this thesis.

5.2 Visitor survey

The second part of the research is a visitor survey. This research was carried out in partnership with the Travel Association "World Without Borders". The Association and the author of the thesis were interested in learning about Chinese tourists who visit Russia in order to get a better understanding of how to promote Russian tourism destinations to these tourists. Thus, the main goal for the research was to create a "Chinese visitor profile" for Moscow with a goal to learn from the research outcomes and repeat the research for other Russian destinations in the future.

The research project was divided into four stages: planning (June – August 2016), data collection (September – October 2016), analysis of the data (October – November 2016) and reporting (December 2016 – January 2017). The first three stages will now be described in detail.

5.2.1 Planning

Research population was limited to Chinese visitors to Moscow who stayed in the city for at least one night with the purpose of leisure or business. Last year's figures of Chinese arrivals to Moscow were used to calculate the research sample. In order to be able to project the results for the entire visitor population with confidence, the estimated sample size was set to 400 valid responses.

To select the most appropriate data collection method, the author analyzed similar surveys that were carried out in the world and studied several publications on the methodology of visitor surveys. According to the guidelines for conducting an on-site visitor survey, interviewer-administered survey would have been more a preferable mean of data collection as it generally produces a higher response rate (Booth 1991, p. 9). However, self-administered paper questionnaires were selected instead as the most cost-effective method.

After the data collection method was selected, the author of the thesis and the Travel Association developed questions together to meet the needs of the Association. One of the key goals was to find out about the choice of channels of information used by Chinese tourists to plan their trip and leave reviews. A small-scale desk research was done on the travel-related media channels that are popular in China (not included in the thesis). As the result, the list of websites and company names was obtained which was then suggested as the answer options in the questionnaire.

From the methodology literature, the manual of Visit Scotland (Scotland's National Tourist Organization) should be mentioned as the most useful source for planning the questions of the survey. This publication listed sample questions for visitors designed specifically for tourism destinations.

The questionnaire was tested to take no longer than 10-12 minutes to fill. It consisted of 25 questions broken down into three sections for the easier visual perception for the respondent and facilitation of further analysis. The aim of the first section was to find out about respondent's personal characteristics, the second was devoted to the trip planning process and in the final, third section, Chinese guests were asked about the details of their trip and satisfaction with the destination.

Most of the questions were multiple-choice, one was open-ended (respondent's home town) and five questions were of mixed type, suggesting "other" option with a space to add own answers. The last three questions on the experience evaluation involved a scale from 1 to 10.

The questionnaire was translated into Chinese and designed for print by Association's experts. Translated version of the questionnaire in English language is given in the

Appendix 2 and the sample questionnaire in Chinese language is presented in the Appendix 1.

5.2.2 Data Collection

In September the letters were sent to the email addresses of Moscow members of "China Friendly" certification programme, the project of the Travel Association. The companies were invited to participate in the project by distributing the questionnaires on their sites.

Six locations have confirmed their participation in the research project, including a five-star chain hotel, a large hotel popular with conference visitors, a mini hotel with apartment accommodation and a war-theme museum. The wide range of the selected partners for data collection was beneficial for the variety and representativeness of the research sample.

Questionnaires were delivered to the locations in packs of 50 and 100 where they were distributed to Chinese tourists by personnel. The survey blanks were either handed out to Chinese guests on the information desk/reception or left in their rooms.

The partners were encouraged to develop a motivation system to increase the response rate. For instance, at one hotel a free drink at the hotel bar was offered to the guest as a reward for a completed questionnaire.

All data was collected during the three weeks of October 2016 and 82 questionnaires were returned. From them, 7 were considered invalid because of the illegible markings on the blanks.

5.2.3 Analysis

75 valid questionnaires were put into IBM SPSS software by giving numerical codes to the answer options. The questionnaires were then analyzed with the software.

Firstly, frequency analysis was applied to the data and the results were presented question by question in charts and tables. After that, statistical testing was done to reveal correlations in the data.

The main source of reference for the analytical work with the data was the lecture material on market research methods from Saimaa University of Applied Sciences (Mirola, n.y. b).

5.3 Member interview: a case study

Previous parts of the research focused on competitors of Russian destinations marketing to Chinese and visitors from China. The analysis of collaborative destination marketing practice applied to Russian-Chinese tourism would be incomplete without the perspective of local tourism companies working with China.

The final part of the research is of a qualitative research type. It presents an exploratory case study: a member company of the “China Friendly” programme was asked about their satisfaction with the programme and collaboration with “China Friendly” interest groups. The project of interviews with “China Friendly” tourism companies was initiated and developed with an approval of and support from the Travel Association “World Without Borders”.

5.3.1 Planning and data collection

The author of the work and the Association agreed on semi-structured interviews as the most suitable method of data collection. This method allows complementing the main predefined themes with other related questions during the dialogue and is especially useful in context of low awareness issues (Mirola n.y. a, p. 17). By the time the research was carried out, “China Friendly” programme had been in place for less than two years since its launch. There were no previous studies on members’ satisfaction with the programme. Several pre-defined topics were suggested by the project management team, while the semi-structured format left an opportunity to include additional themes that could be suggested as important by the member companies.

The initial sample included “China Friendly” companies from other regions of Russia than Moscow. This limitation was suggested by the Travel Association. One reason for that was the intention to learn about regional perspectives; another argument in favour of the decision was that “China Friendly” companies of Moscow had already been actively involved in another project by that time.

It was decided that the interviews would be held over Skype in October – November 2016. In October 2016 the questions for the interviews were firstly developed by the author of the thesis work and then reviewed and edited by the manager of “China Friendly” programme. The letters inviting companies to take part in the interview project were then sent by email.

In the last week of October one hotel had contacted the author of the thesis work. The date and time of the interview was arranged on the 9th of November.

The interview was held over Skype according to the agreement on 9.11.2016 at 11:21 – 11:56 by Moscow time zone (GMT +03:00). The author of the thesis acted as an interviewer. The interview was tape recorded with the permission of the respondent; in addition, the interviewer took notes on paper. The recording and notes were the sources for the interview content analysis.

5.3.2 Analysis

The interview data was firstly transcribed into text format sentence by sentence after the respondent's speech (not included in the thesis out of confidentiality reasons). The data was then analyzed for key words, patterns and themes.

At the first stage questions were connected with answers in a tabular form to give a short overview of the discussion's content. At this stage the pre-defined interview structure was dominating: the questions of the interviewer suggested topics for the discussion. At the second stage the key words were listed by the frequency of use by the respondent in a tabular form. After that, the cognitive map was built using the key words and links between them. Cognitive mapping method is used to analyze qualitative data in order to show the person's representations of concepts about a certain topic, displaying the relationships that exist between them (Mirola n.y. a, p. 31 after Proctor 2005, p. 335). Finally, after the careful revision of the key words, the cognitive map and the context of the interview transcript the most important themes for the respondent were revealed.

6 Results and Summary

6.1 Benchmarking

The benchmarking exercise identified best practice from destination management organizations of Australia, Great Britain and the United States. Each destination's important metrics and best practice are given in separate subchapters, destination by destination. The main sources of information were the web pages of national tourism agencies (Tourism Australia, Visit Britain Brand USA) and their publications.

6.1.2 Australia

For Australia, China is the priority market which shows the fastest growth in international arrivals and expenditure compared with other markets. In 2011 the overnight expenditure of travelers from China reached more that 3.8 billion Australian dollars, making China the most valuable tourism market for Australia. (Tourism Australia 2012, p.1.)

The importance of Chinese market was recognized as early as in 1998, when Australia was granted ADS. The Department of Industry, Tourism and Resources initiated consumer satisfaction research, industry audits and consumer education campaigns targeting Chinese leisure group travelers within ADS scheme. (Organization for Economic Co-operation and Development 2003, p. 26.) Within the following 12 years Australian tourism representatives managed to develop strong relationships with the key organizations of Chinese tourism industry with the help of 5 000 *Aussie Specialist agents* who promoted the country in China (Tourism Australia 2011, p.7).

Figure 9 below was obtained from a market snapshot for the year ending March 2016. It shows a continuous and fast rise in Chinese arrivals. The total number of Chinese visitors reached a million in 2015. More than half of them were visitors on a purpose of holiday. (Tourism and Events Queensland 2016.)

Figure 9 Chinese visitors to Australia 2007 - 2016 (TEQ 2016)

At the beginning of the time period considered in the thesis, independent travel to Australian destinations already constituted a significant share of the total arrivals. The pie chart below (Figure 10) shows the proportion of visitor types in 2010 (Tourism Council Western Australia 2011, after Tourism Australia).

Visitors by visa type 2010

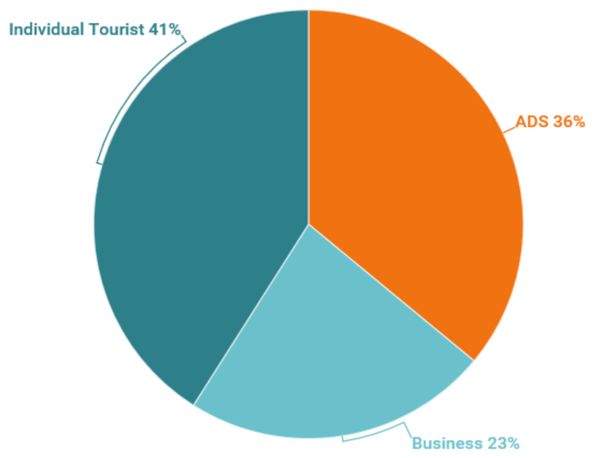

Figure 10 Chinese visitors to Australia by visa type (after Tourism Council WA 2011)

Principles of strategic planning in tourism, destination management and sustainability have been developed in Australia for a long time period. Tourism industry is given a priority; tourism is considered to be of primary value to the national economy. (Organization for Economic Co-operation and Development 2003, pp. 13, 19)

In June 2011 “China 2020 Strategic Plan” was presented. It was developed by Tourism Australia in collaboration with government and industry stakeholders. (Tourism Australia, 2012.) Prior to that, in April of the same year, Chinese and Australian governments signed a Memorandum of Understanding to strengthen tourism cooperation and promote cooperation in emerging travel segments such as individual, education and company paid incentive travel (Australian government, Australian Trade and Investment Commission).

One of the key outcomes of the collaboration was the decision to ease visa regime for Chinese travelers (Tourism Council Western Australia 2011, p. 5). In 2015 Australia and China signed a free trade agreement and as a result Chinese nationals were granted a new multiple entry 10-year visa (Tay 2015).

Australian national tourism organization implements a balanced approach to destination marketing; international collaboration is used extensively. For example, international campaign “There’s nothing like Australia” of 2012 in partnership with 19 airlines in 16 markets raised awareness about Australia in China where the response to that campaign was said to be the highest (90 per cent) (Tourism Australia 2012, p. 5). In other words, extensive destination marketing to China is smoothly integrated into general destination marketing line of the country.

The development of Australian-Chinese tourism builds on extensive customer research, the findings of which are shared with Australian and Chinese tourism industry. Each year from 2011 to 2015 Tourism Australia published research-based reports for its tourism industry – from general China market advice to deeper analysis of specific segments. A brief description of these reports' contents is provided below.

In 2012 the findings of a research that was done in 2011 in thirteen China's cities were published. The study was looking into the long-haul travel behavior and preferences using focus groups and online survey. Based on these findings, Tourism Australia realized opportunities for Australian tourism in secondary cities of China and included geographic expansion plans in the national tourism strategy to year 2020 (Tourism Australia 2012a).

Another publication was released 2013. It consisted of action plans for the industry with case-specific recommendations and "Marketing matters" report that analyzed the data from Australian regional destinations' own research projects and other sources to present a detailed and up-to-date market picture with recommendations ranging from social media marketing to Chinese dining etiquette.

Next year a report that applied regression analysis to the data of Chinese satisfaction survey was released. In 2015 two publications were made based on the data from Tourism Research Australia International Visitor Surveys from 2011 to 2013: one was devoted to leisure FITs from China and their dispersal patterns across the country, other analyzed high-spending Asian visitors in Australia.

Australian authorities put 600 000 Australian dollars to deliver the National China Ready programme (Hotels.com 2014, p. 47). In addition, regional tourism organizations organize their own training programmes such as "Destination Q Masterclass China" for the Queensland tourism industry in 2014. The particular focus of the Master class was on the independent traveler. Moreover, Tourism Australia continues to nurture "Aussie Specialists" to work in China and initiated the series of familiarization programs for front-line tourism agents in China in 2012 (Tourism Australia 2013).

Collaboration on different levels is very important for Australian tourism industry. One example is collaboration with China in marketing, for example, signing marketing agreements with China Southern Airlines, China Eastern Airlines, Air China, China Union Pay, and China Travel Service in 2012 (Tourism Australia 2013 p.1). Domestic collaboration is a common practice, too, such as the partnership of Tourism Australia with State and Territory tourism organizations for marketing campaigns and training for retail travel agents (Tourism Australia 2013 p.3). Moreover, collaboration with researchers should be mentioned: commissioning various private companies or partnering with universities (for example, in 2013 Queensland Tourism Industry Council invited four students from Queensland's University to prepare a study on Chinese visitors) (Queensland Tourism Industry Council 2013).

Tourism Australia invests a lot in its marketing campaigns. Australian Government's four-year funding for a marketing campaign in Asia in 2012 was about 32. 7 million euro (Tourism Australia 2012b). Campaigns are planned to meet the targets for China market from the national tourism strategy. For example, the already mentioned "There is nothing like Australia" campaign and other consumer campaigns during 2012 – 2014 were rolled out in eight second tier cities of China, supporting the plans for geographic expansion on China market. Another significant campaign was taking place in Chinese social media (Weibo and Tudou) showing a clip made of the episodes of a popular sitcom that was set in Australia. This campaign was sponsored by Tourism Australia and "Friends of Australia" (a program which encourages international celebrities to travel to Australia). (Marketing to China.)

Tourism Australia has identified their target market as *affluent Chinese couples who have an independent travel mindset and want to explore and experience local culture* (Tourism Australia, 2020 China Strategic Plan Summary). Another example of Australian target segments of Chinese tourists would be the official Tourism Queensland's target markets: Self Challengers and Sightseers (Tourism and Events Queensland 2011, pp. 2-3).

6.1.2 Great Britain

In case of Great Britain it is the dramatic increase in the number of visits and spending in the recent years that makes the destination interesting for analysis. In 2015 the number of Chinese arrivals to Great Britain for all travel purposes was 223 391 which constituted 47. 2 per cent growth from the previous year. The share of leisure tourists from China from total Chinese arrivals in 2015 was 59. 5 percent with 133 031 arrivals. The change from previous year was as much as 66. 6 per cent. (Figure 11, Visit Britain).

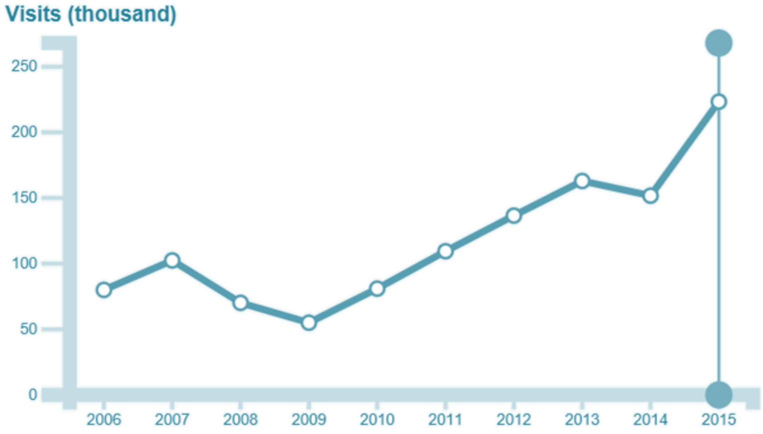

Figure 11 Chinese arrivals to Great Britain 2006 - 2015 (Visit Britain)

The charts below depict the changing trip organization preferences of Chinese outbound tourists to Great Britain. Figure 12 shows that already in 2012 only a little less than a half of all travelers were independent (Visit Britain 2012, p.28).

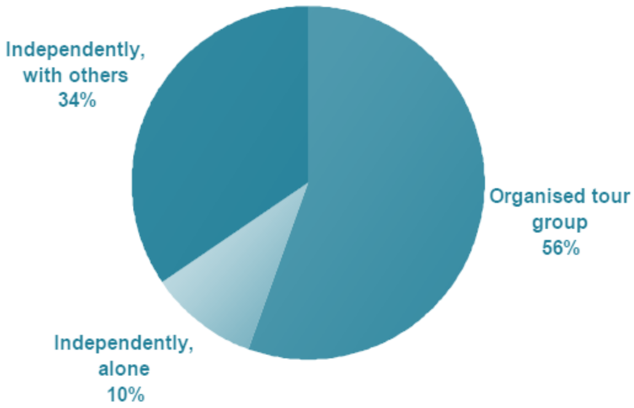

Figure 12 Independent versus Group tourists to Great Britain (Visit Britain 2012)

As already mentioned in the chapter devoted to global Chinese outbound tourism trends, Chinese travelers are becoming more experienced and prefer to organize trips themselves. The trend can be observed in Britain: figure 13 shows the escalating growth of independent Chinese travel to Great Britain (Visit Britain 2013, p. 6).

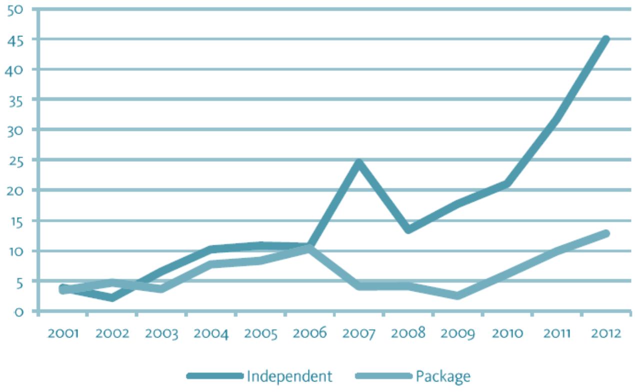

Figure 13 Independent and Package tourist numbers 2001 - 2012 (Visit Britain 2013)

In 2015 Chinese spending went 18 per cent up from previous year and constituted 586 million pounds, moving China into the UK's top 10 most valuable inbound markets. Among these, leisure travelers spent 239.4 million pounds, a 73 per cent increase from 2014.

Unlike in Australia, in Great Britain China has not been until recent time included in the top-ten most valuable tourism markets for the national economy. However, during the past five years Visit Britain has put a consistent effort to study this market, monitor Chinese attitude to Great Britain and take actions to attract more travelers from China.

In 2013 Culture Secretary Maria Miller proclaimed an initiative to make Britain the most welcoming destination for Chinese visitors in Europe (Gov.uk 2013). This statement was followed by launching a "Welcome China" campaign in spring 2014.

Perhaps the most significant events for the development of British-Chinese tourism were the change visa policy and the introduction of the first China oriented marketing campaign. They will be described in the next paragraphs.

Visit Britain offers a free of charge "GREAT China Welcome Charter". This offer is made for companies in tourism who wish to market themselves as providing exceptional service for Chinese guests. This package allows them to be featured online and in tour operators' directories, gives a priority access to market information, trade missions and grants the ability to use "GREAT China Welcome" charter mark. This mark gives a "China-ready" status for companies who customized their services by speaking Chinese language and accepting China Union Pay. There is no strict assessment of the companies; however, prospective "China Welcome" organizations must provide a firm evidence of having several essential criteria fulfilled.

As in Australia, research plays an important role in understanding opportunities and threats on the market. Several research projects were targeted specifically at the China market. The first publication related to Chinese market on the website of Visit Britain is dated year 2010 and it looks into Chinese business travelers and general characteristics of Chinese market, such as the country population and economic state of affairs. The most recent publication is a 2014 report presenting Chinese market profile. Several preceding research projects helped to create the market profile, such as the survey of Chinese perceptions of Britain, a comparison of Chinese visitor with generic visitor to Britain (2013) and a study of how the visa regime influenced Chinese visitation (2012).

The latter might be especially interesting in the context of Russian tourism industry as currently tourists need to obtain a separate visa to visit Russia as well as Great Britain (in contrast to European countries' Shengen visa). The British study analyzed the results of Chinese tourists and tourism industry professionals' survey to identify whether or not visa regulations served as a barrier for Chinese tourists to visit. One interesting finding was that (perceived) complicated visa application process and (perceived) low chances of getting a visa turned out to be more significant barriers while the cost of the visa was a less significant barrier (Visit Britain 2012, pp. 13-15, 34).

According to the recent press release, in January 2016 new visitor visas for Chinese were introduced. These visas will be valid in the United Kingdom for two years – four times longer than the previous half-year limit. The cost of the new visa remains the same. (Gov.uk 2015.) This step is expected to bring significant benefits to the national economy with increased Chinese visitation.

Visit Britain has a marketing co-operation offer in all markets including China. The partnership provides additional reach and exposure, access to media, trade and PR resources and marketing campaigns. By signing themselves in, tourism service providers or regional tourism organizations become connected to a collaborative platform of Visit Britain's key industry partners across international markets. The partnership is based on a "co-operative marketing spend model" meaning that to join the partnership programme and the platform a company must bring 25 to 100 thousand pounds investment (29.5 – 118 thousands euro). The amount is then match-funded by Visit Britain to meet the aims and objectives of campaigns developed together with each partner on a case basis. (Visit Britain.)

A separate website section “Marketing to China” aims to help the companies to find marketing opportunities for China market. It includes a list with contact information of private organizations that provide support and consultancy on the Chinese market to British tourism businesses. Free-download materials with useful advice for businesses are provided, including recommendations for digital and social media marketing targeted at Chinese tourists, descriptions of key players in Chinese tourism industry with contact information, detailed information on Chinese tourism regulations and advertisement costs.

In 2011 Visit Britain launched a multi-million pound “GREAT Britain” brand image campaign. British Government and a vast range of partners worked together on this campaign including UK Trade & Investment, Foreign & Commonwealth Office, the British Council and the Department for Culture, Media & Sport. To 2015, according to Visit Britain’s web pages, the campaign attracted additional 630 million pounds in visitor spend.

Several smaller marketing campaigns under “GREAT Britain” name were targeted to the specific markets. The first campaign for China was the “GREAT Chinese names for GREAT Britain”. Chinese consumers were invited to give British sights and attractions Chinese names and post their pictures next to these sights on social media. The campaign was using various channels: large billboards, social media, digital platforms, magazine, radio advertisement and taxi advertisement across four Chinese cities. The web pages of this campaign received 1.3 million visits when the campaign was running and 300 million people reached through Visit Britain’s Chinese social media channels. Advertising equivalent value generated from press releases was estimated to be worth of 2.5 million pounds (2. 95 million euro).

These marketing efforts could have been the reason for more than 60 per cent increase from 2014 in 2015 and also, according to Financial times article, for 326 per cent increase of the amount spent each year by Chinese visitors (to 497.5 million pounds in 2015) during the past five years (Moore 2015).

The visitors of Great Britain are more likely than the average tourist top the country to be making their first visit. They associate Great Britain with museums and heritage, but not sport. A Chinese profile study of Visit Britain is a thorough analysis of Chinese tourists expectations from Britain. The study concludes that Great Britain should definitely market its rich heritage; however, there are certain areas in which competitors of Great Britain destinations perform better: natural beauty, romance and modern and fashionable image. (Visit Britain 2013, p. 14.)

6.1.3 United States

Arrivals from China to the United States have been growing rapidly in the past years and currently China is a *critically important market for the United States*. (Brand USA 2015, p. 5.) In 2002 only about 200 thousands of Chinese tourists made their trip to the States (still, this number is larger than Great Britain's Chinese arrivals in 2015). In 2013 1.8 million Chinese visited the country making China a number 5 overseas market for the United States. In 2014 arrivals grew by another 21 per cent to 2.2 million arrivals and China market moved up to the fourth largest market. (Brand USA 2014, p. 16.) The share of leisure tourists, according to the latest market profile, is 63 per cent (Brand USA 2014, p.26) In 2014 Chinese tourists were spending 6 000 – 7 200 dollars per person per trip to the United States which made them the highest spending visitor group for the country (Brand USA 2014, p. 9).

A graph below (Figure 14) captures the change in Chinese arrivals from 2009 to 2015. It combines the figures from several Brand USA reports.

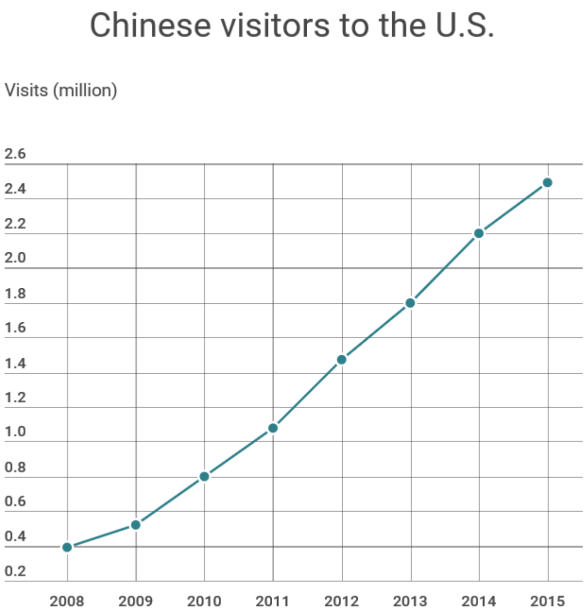

Figure 14 Chinese visitors to the United States 2008 - 2016 (after Brand USA)

A pie chart below (Figure 15) shows the proportion of package versus FIT tourists from China in 2014. Although there was no more recent statistic available after the new visa regulations were introduced (described in more detail further), the share of individual travel is very likely to rise in the following decade. (Brand USA 2014, p. 26.)

2014 Chinese travelers to the United States

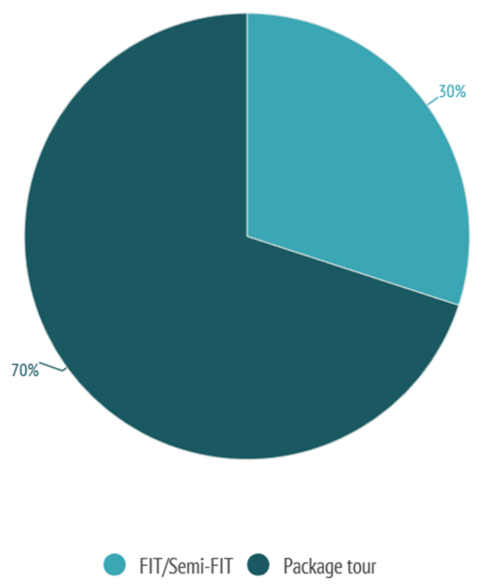

Figure 15 FIT versus Package tour Chinese to the United States (Brand USA 2014)

Until 2010 there was no coherent tourism strategy in the United States. Different states were competing with each other for tourists. In 2010 a public-private partnership Brand USA was created financed by the President with the purpose of national marketing. (Kimes 2013.) After analyzing several publications of Brand USA, several key principles of the marketing strategy on Chinese market were identified. These are: diverse tourism offering (not only the traditional places of interest but also a variety of other products and destinations), co-operation with Chinese travel trade and airlines to increase investment in the United States tourism promotion and extension of Brand USA marketing programs to secondary markets of China. The organization aims to provide market-entry opportunities to China for tourism businesses of the United States and build a strong brand presence built with annual road shows, seminars, VIP-meetings and celebrations and social media channels in China.

A significant policy change happened in 2014 when the new visa regulations came to force. Currently, visas for the Chinese tourists are valid for 10 years, and the application procedure takes place online within only five days. Tourism authorities expect this important step to cause increase in repeat travelers and also FIT/Semi-FIT travelers and attract more investment into the United States economy. By 2021 more than seven million arrivals from China are forecasted. (Brand USA 2014, pp. 21-22.)

Concluding the Principles and policy section, it is important to note that, like Australian and British authorities, the United States practices a balanced approach to all its important tourism markets. Even though China is valuable target market showing the strongest growth, Brand USA *cannot afford to under-invest in established markets* in a modern competitive environment. (Brand USA 2015a, p. 23.)

Although the reports on Chinese consumers are based on prior research such as customer polls and tour operator surveys, most findings about the market are presented as business reports rather than take a form of academic research papers. On the website of Brand USA the research section currently consists of several reports predominantly devoted to Chinese market, such as the “China Market Profile” with comparison figures from the previous year (2012), “China Tourism Market Update” (2014) and “Telling Your Story in China” (2015a). The latter is a detailed presentation to educate tourism organizations on marketing to Chinese customers including a brief summary of Brand USA accomplishments to date.

Tables, figures and projections in these reports are followed by cooperation offers such as paid marketing programmes (see, for example, Telling Your Story in China presentation, Brand USA 2015a). Thus, applied tourism research, training and collaboration of tourism businesses are considered as inseparable. An example of tourism training is “USA Discovery Program”, the online training tool designed for tourism experts in international markets to help them sell the United States as a premier travel destination (Brand USA 2016, p. 34).

Brand USA has a long list of international marketing partnerships. For Chinese market, these are, among others, Elong, Dao Dao (Chinese version of Trip Advisor), Orbitz Worldwide, WAYN media pages and “Essentially America” print magazine. (Brand USA 2015b, pp. 58-59.) Brand USA offers to its partners programs across all marketing channels that include media featuring and saturation of their websites with content (including the attention of popular bloggers or key opinion leaders (KOL) in China).This offer was marketed to potential partners with the example of Massachusetts destination’s custom site. Extensive social media posting and content offered by Brand USA helped Massachusetts attract 2.1 million visitors to its web pages. (Brand USA 2015a, pp. 38-41.)

Another option for destination and company brands is marketing via one of the two official Chinese language websites GoUSA.cn and GoUSA to expand reach to the Chinese market. So far (by 2014) the web sites have attracted more than two million visitors. (Brand USA 2015a, pp.35 – 37.)

International consumer marketing campaigns generate 81 per cent of inbound tourism to the United States. Each year brand campaigns are scheduled for the international target markets and customers are engaged through various media channels. While in the established markets these campaigns are short-term (2 months for France and the UK), a brand campaign in China was rolling for the total of six months (in 2014). (Brand USA 2015a, p. 30.)

In 2013 Visit California started its first consumer destination marketing campaign and announced its “ambassador” – Chinese model and actress Miss Gao Yuanyan. The celebrity was appointed to be the face of Visit California brand, attracting Chinese public to California. The star also invited her fans to participate in a quiz to win a trip to California. This is a good example of how a popular local persona could help a destination brand: the star’s fans become the fans of the destination. (Visit California 2013.)

In 2014 a large international theme campaign “Discover America: Great American Food Stories” was launched in China in collaboration with the State Department. Culinary promotions were organized in several cities of China, including media interviews and VIP-meeting for 500 guests to present them the Cookbook. (Brand USA 2014, p. 40.)

In 2016 a new documentary was created targeting Chinese audience. The film tells about America's thirty national parks to show Chinese travelers that there is more to see in the United States of America than just the gateway cities New York, Los Angeles and Chicago. (He 2016.)

One important component of the destination marketing strategy is a continuous presence on Chinese social media. Brand USA does more than ten posts a day across its media channels which help to generate tremendous reach in China. The use of Key Opinion Leaders is another popular marketing practice that helped Go USA to receive over 100 000 000 impressions in Chinese social media. (Brand USA 2015a, pp.30-32).

United States of America position themselves as a destination for the first time travelers who would like to see modern culture and have an “off the beaten track” experience. The target customers, as defined in a recent financial report of Brand USA are *young, urban, upwardly-mobile couples and new families* who seek passive exploration, enjoy nature, shopping and cultural attractions and are motivated to travel by social status and prestige. (Brand USA 2016, p. 41.)

6.1.4 Best practice summary and conclusions

The best practice shows how the three countries across the globe managed to increase the numbers of Chinese arrivals and maximize the profit from this growing market. Russia holds the strong market position in Chinese arrivals which is currently higher than one million Chinese arrivals per year. This result is very close to Australian figures and the leader in Chinese arrivals is the United States where the number of arrivals is two times larger.

The picture is different if one compares the leisure traveler share in the competitors' reports. More than a half of Chinese nationals to the United States, Great Britain and Australia visit these countries with the purpose of holidays. Their share, according to the latest reported figures is 63 per cent (the United States), 59.5 per cent (Great Britain) and 50 per cent (Australia). Russian result is 36.4 per cent which means that leisure travelers who are the most famous for high spending do not consider Russia as their priority destination at the moment. Thus, to maximize the value of Chinese market for Russia it could be beneficial to attract more leisure travelers.

Customer is at the centre of attention of tourism marketing. Consumer marketing campaigns worked best to attract leisure travelers' attention in the United States (for example, Los Angeles fan page exists on the Chinese version of "Discover Los Angeles" web site). For a maximum impact on Chinese market the destinations partnered with Chinese media, invited Chinese celebrities and emphasized the friendliness and openness that Chinese tourists seem to appreciate.

Large international brand campaigns help to create and maintain strong brand presence which raises awareness of the destination and its attractiveness for tourists as well as potential investors and business partners. Brand campaigns that were considered in this report ("GREAT Britain, "There is nothing like Australia", "Discover America") were rolling in China and were in some cases customized for Chinese audience, for example, names campaign of Great Britain. A lot of investment is required for these campaigns to be successful; however they have an international reach that pays off the investment in the long term.

Destination marketing works most effectively when it is integrated into a national tourism strategy. The most "radical" case is Australian, where tourism industry is the main driver for the national economy. Another example was the introduction of Brand USA in America to encourage collaboration and unite forces for the strong performance of the large destination brand as well as smaller ones. This reminds of the importance of collaboration in tourism. Some approaches to collaboration considered include: match-funding of the marketing campaigns (Great Britain), industry training both for local businesses and Chinese colleagues (Australia, the United States), media offers for destination and company brands and market-entry packages (United States).

All three destinations recognize the importance of Chinese market and its value for the economy; however, they keep a balanced approach to all their important markets and hold their position on the international markets. Even though Chinese market is currently growing fast, the leading destinations cannot afford to ignore other markets in favor of China in the world of competition.

6.2 Visitor Survey

A total of 75 survey blanks were analyzed. The data is firstly presented in three parts question by question (marked as (Q№)). Part 4 is devoted to statistical testing and correlations in the data.

6.2.1 Visitors' characteristics

(Q1) The first question was open ended and asked about respondent's city of residence. Because most of the respondents wrote in Chinese characters, this question, as an exception, was analyzed by Chinese speaking experts of the Travel Association.

The list of cities is given in the figure 16 sorted in the descending order by the amount of responses. More than half of tourists of the research sample – 66. 6 per cent – arrived from Beijing, the capital of People's Republic of China. Another 12 per cent of the respondents came from Jiujiang, the second largest city of Jiangxi province.

City	Visitors
Beijing	50
Jiujiang	9
Chengdu	3
Nanjing	3
Shanghai	2
Changchun	1
Changsha	1
Guanzhou	1
Harbin	1
Jinan	1
Liaoning	1
Tianjing	1
Zhang	1
Total	**75**

Figure 16 Sample Chinese visitors to Moscow 2016: cities

(Q2) Of 73 respondents who stated their age group, almost a third reported to be of a middle age (Figure 17). A quarter of the respondents belonged into the 51-60 years old age group. In the sample there were slightly less Chinese tourists in their thirties and senior age groups (roughly 16 and 18 per cent respectively). Teenagers and young people below the age of 24 years represent the cumulative per cent of 11.1 of the people who replied to this question.

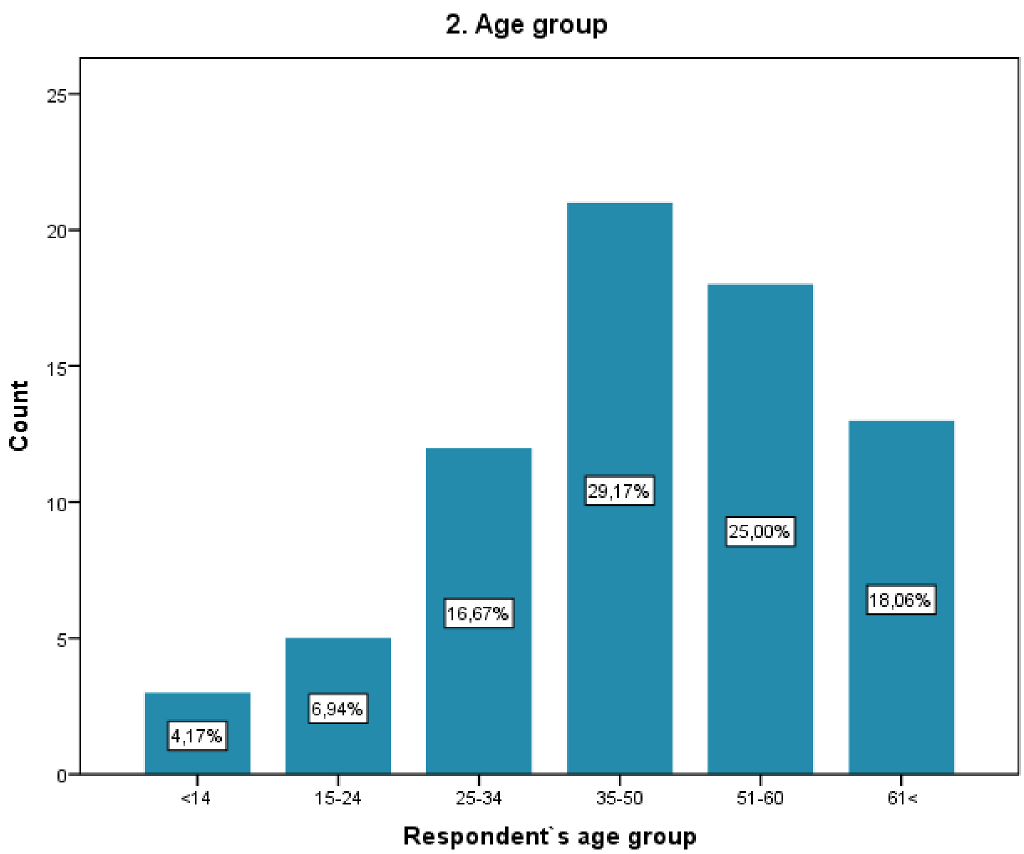

Figure 17 Respondents' age group

(Q3) In the selected sample there were more female than male respondents: 55. 6 versus 44. 4 percent, not including three people who did not respond to this question.

(Q4) More than the half of the respondents held a university degree. As table 18 shows, from 71 total responses to the education level question, “Higher education” was the most common answer followed by a professional education obtained from a college.

4. Education level

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Basic education	5	6,7	7,0	7,0
	Secondary education	11	14,7	15,5	22,5
	Further professional education	13	17,3	18,3	40,8
	Higher education	41	54,7	57,7	98,6
	PhD degree	1	1,3	1,4	100,0
	Total	71	94,7	100,0	
Missing	System	4	5,3		
Total		75	100,0		

Figure 18 Respondents’education level

(Q5) There was no dominating field of occupation for the significantly large number of survey participants. Workers of different sectors were distributed quite evenly, as depicted on the pie chart below (Figure 19).

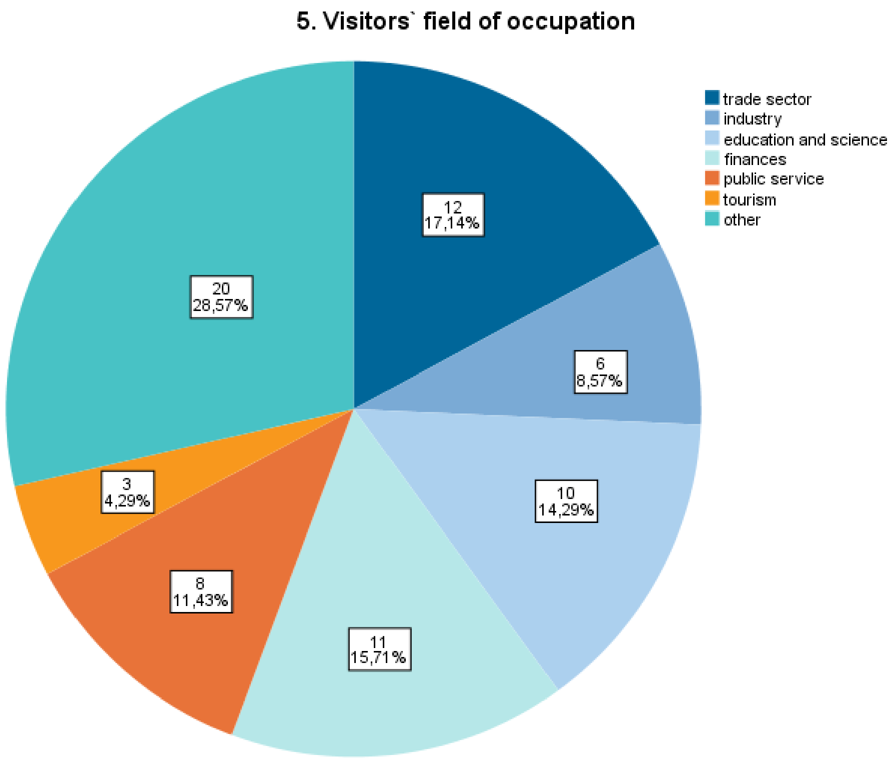

Figure 19 Respondents' occupation

(Q6) A third of the Chinese tourists included in the sample indicated to be earning a monthly income of 5000 – 8000 of Chinese renminbi (approximately equivalent to 680 – 1000 euro), thus falling in the middle income brackets (see Figure 20). The formulation of the question should be taken into consideration: the tourists were asked about their personal income, not of the household. Another 19 per cent of the tourists reported income in the top brackets, while high-earners constituted 8 per cent.

Figure 20 Respondents' monthly income range

(Q7) A quarter of the respondents came with their husbands or wives, 19 per cent travelled with friends. From the distribution illustrated by the pie chart below (Figure 21) it can be concluded that not so many unmarried couples and families with children became a part of the sample.

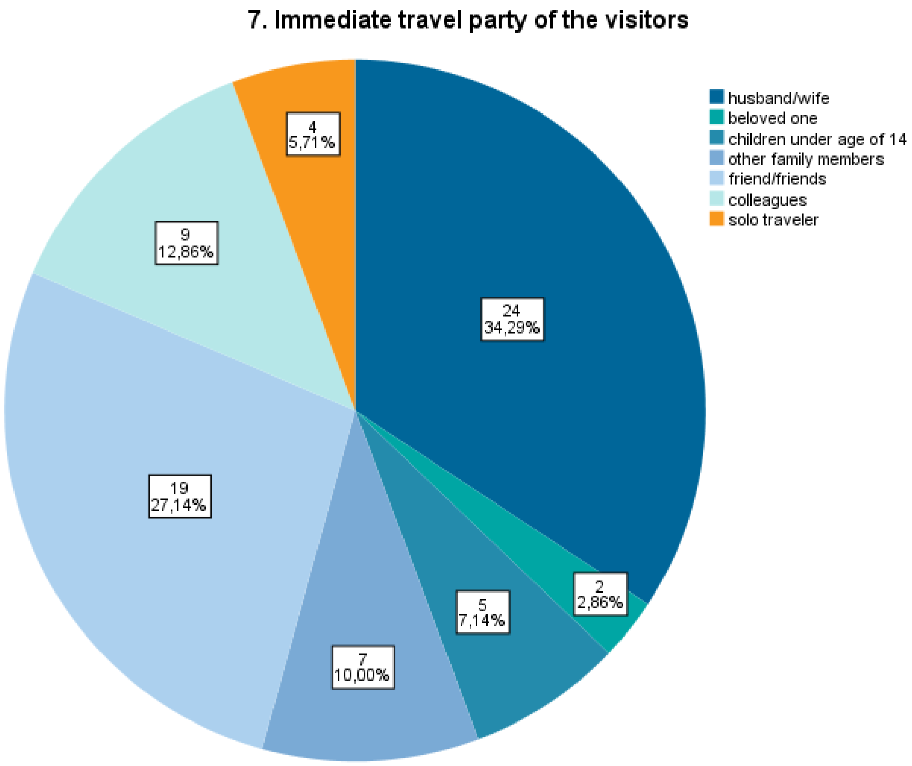

Figure 21 Immediate travel party of the respondents

(Q8) The majority of the Chinese travellers from the sample were the first time visitors to Russia: 77.5 per cent of 71 people who replied to this question. The remaining respondents had already visited Russia before.

(Q9) Most visitors were travelling with leisure purpose (about 70 per cent of total responses). The question allowed multiple answer options, and several survey respondents selected both entertainment and sightseeing. Still, as the Figure 22 (see the next page) shows, about 45 per cent of the total responses gave the "Entertainment" answer which is more when compared with a quarter of respondents who opted for Sightseeing as their main purpose.

(Q10) Three fourths of the respondents (51 tourists) were the members of an organized group and one fourth (17 tourists) were independent travellers, and 7 tourists did not give an answer to this question.

9. Main purpose of visit

		Responses N	Responses Percent	Percent of Cases
Main purpose of visit[a]	Entertainment	30	44,8%	45,5%
	Sightseeing	17	25,4%	25,8%
	VFR	2	3,0%	3,0%
	Business	12	17,9%	18,2%
	Study	3	4,5%	4,5%
	Health	3	4,5%	4,5%
Total		67	100,0%	101,5%

a. Dichotomy group tabulated at value 1.

Figure 22 Main purpose of visit

6.2.2 Travel Behaviour: from trip planning to booking

(Q11) A quarter of visitors from China were inspired for their trip by a particular interest to the history and culture of the country (see Figure 23). The second popular answer option was Friends and Family recommendations (18 per cent), followed by good Internet reviews (15 per cent). The following confirms the importance of word of mouth and peer review for Chinese tourists as observed in other studies.

11. What inspired the trip to Russia

		Responses N	Responses Percent	Percent of Cases
What inspired trip to Russia[a]	A bargain deal from travel agency	10	13,5%	14,1%
	Good Internet reviews	11	14,9%	15,5%
	Friends and family recommendations	13	17,6%	18,3%
	Travel agency information	9	12,2%	12,7%
	A movie or TV episode about Russia	7	9,5%	9,9%
	Interest to the history and culture of Russia	18	24,3%	25,4%
	Travel lust	2	2,7%	2,8%
	Other	4	5,4%	5,6%
Total		74	100,0%	104,2%

a. Dichotomy group tabulated at value 1.

Figure 23 What inspired the trip to Russia

(Q12) The most common answer option to the question “How long in advance did you plan your trip to Russia” was three to six months in advance (32.3 per cent of the respondents). The bar chart below (Figure 24) indicates that more than a half of the visitors (62 per cent) started preparing for their trip at least three months in advance. The number of last minute decision is, on the contrary, low, as well as the planning of the trip a couple of weeks in advance.

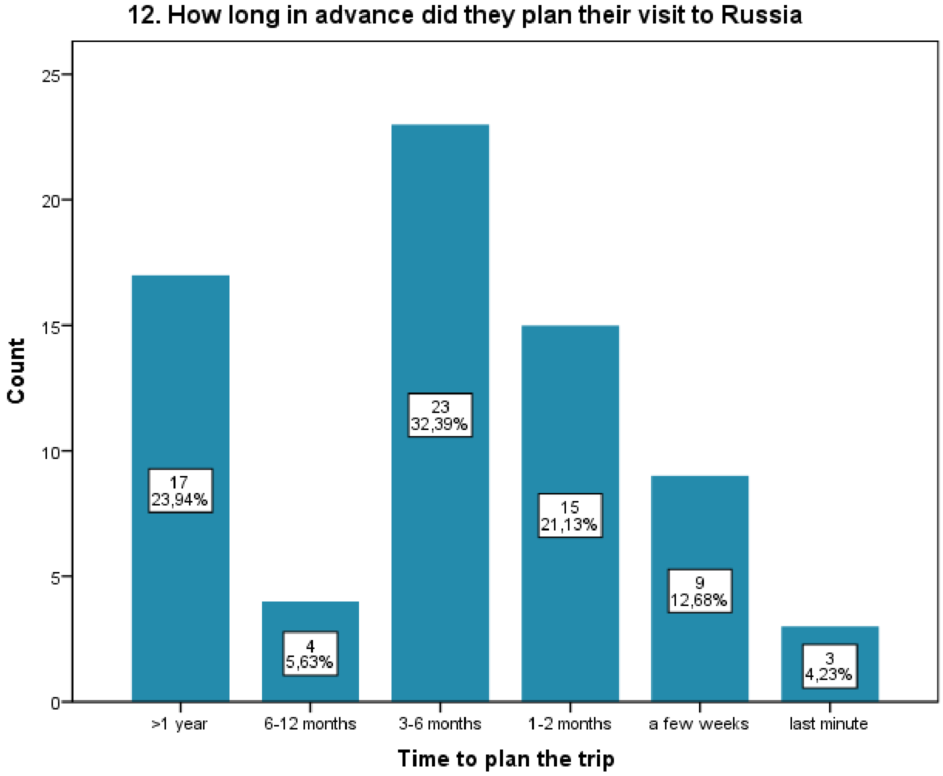

Figure 24 Planning the trip

(Q13) Another question that allowed multiple answer options revealed that Chinese tourists find stories of friends and family the most useful source to plan the trip to Russia (true for one Chinese guest in four, see Figure 25).

13. What helped to plan the visit to Russia

		Responses		Percent of Cases
		N	Percent	
Useful sources to plan the visit[a]	Stories of family, friends, colleagues	17	22,4%	24,3%
	Web search	10	13,2%	14,3%
	Social networks	6	7,9%	8,6%
	Travel company website	12	15,8%	17,1%
	Travel review websites	9	11,8%	12,9%
	Online magazines, travel blogs	5	6,6%	7,1%
	Personal visit to a travel agent	2	2,6%	2,9%
	Newspapers and magazines	2	2,6%	2,9%
	Visit to a fair	1	1,3%	1,4%
	Other	12	15,8%	17,1%
Total		76	100,0%	108,6%

a. Dichotomy group tabulated at value 1.

Figure 25 Sources to plan the trip

(Q14) The multiple-answer question about concerns before travelling to Russia received a total of 91 responses (see Figure 26). The most significant concern of Chinese visitors before their trip to Russia is the fear of language barrier: more than half of survey respondents confirmed having this concern. Unfortunately, the perception of personal and property safety remains on a low level with Chinese tourists: more than thirty per cent of survey respondents had safety related concerns.

14. Concerns before travelling to Russia

		Responses		Percent of Cases
		N	Percent	
Concerns before trip to Russia[a]	Language barrier	41	45,1%	56,9%
	Personal and property safety	23	25,3%	31,9%
	Cultural difference	13	14,3%	18,1%
	Service quality	9	9,9%	12,5%
	Incomprehensible signage	3	3,3%	4,2%
	Wellbeing	2	2,2%	2,8%
Total		91	100,0%	126,4%

a. Dichotomy group tabulated at value 1.

Figure 26 Concerns about Russia

(Q15) Approximately one quarter of the respondents used Ctrip to book their trip, while 27 per cent of respondents did not book the trip online (see Figure 27). Another 25 per cent reported to use a website other than the ones listed in the answer options.

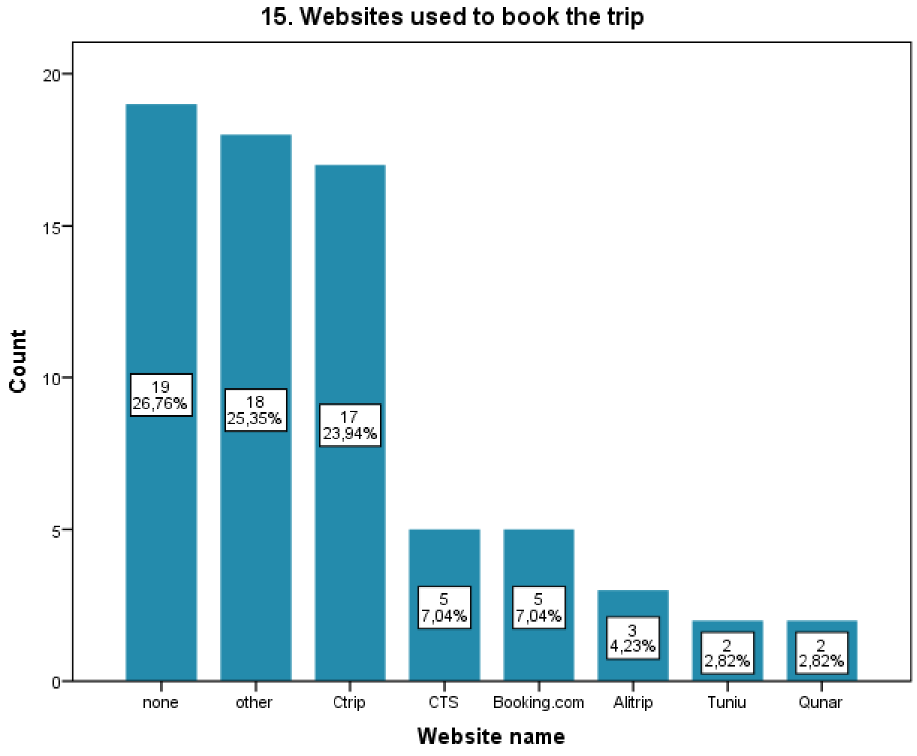

Figure 27 Websites to book the trip

6.2.3 Travel experience in details

(Q16) The question about accommodation category showed quite high number of non-response (17 per cent). From valid responses, 35 per cent were given to the four-star hotel. The next popular option was a three star hotel (approximately 34 per cent), while slightly fewer respondents stayed at the five-star hotel (23. 6 per cent). The bar chart below shows the distribution in more detail (Figure 28).

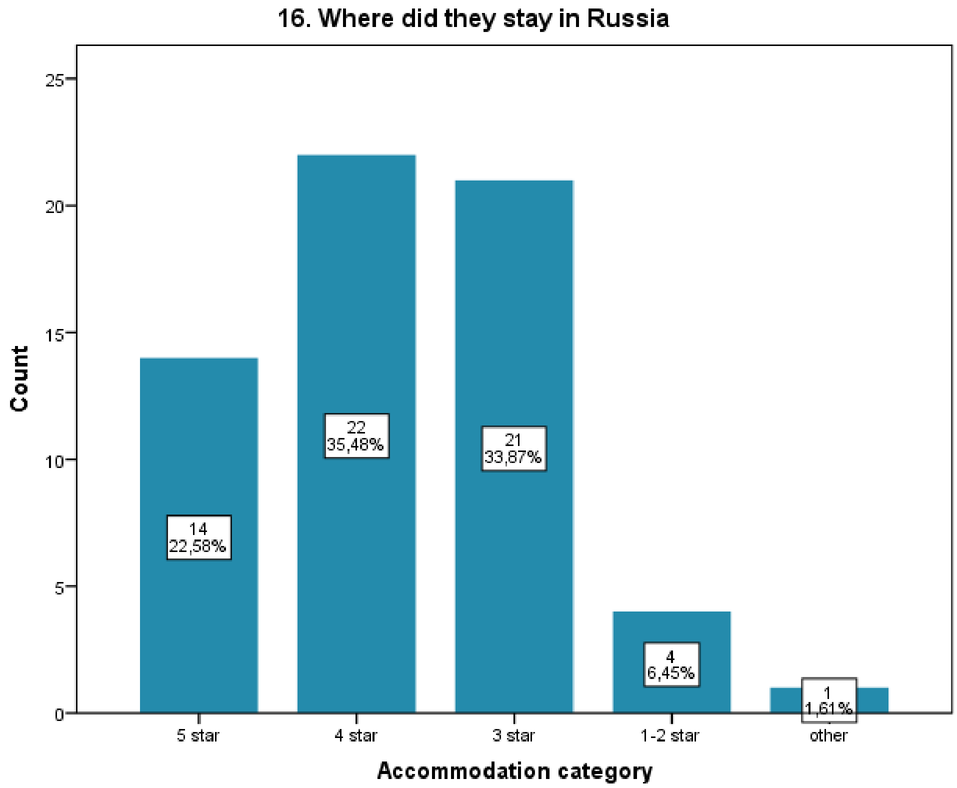

Figure 28 Accommodation category

(Q17) The majority of the Chinese guests from the sample paid Moscow a short visit (1 – 3 nights) during their trip to Russia (see a cumulative per cent 87. 7 highlighted in light blue in Figure 29). The most common answer options were one or three nights spent in Moscow.

17. Nights in Moscow

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	27	36,0	41,5	41,5
	2	8	10,7	12,3	53,8
	3	22	29,3	33,8	87,7
	4 and more	8	10,7	12,3	100,0
	Total	65	86,7	100,0	
Missing	System	10	13,3		
Total		75	100,0		

Figure 29 Nights in Moscow

(Q18) The next question asked the visitors to select at least three hotel services that the guests found important for them. The most popular answer option was a WiFi access (18 per cent of valid responses), followed by the Adapted meals (14 per cent). Chinese speaking personnel, TV Channels and Website in Chinese were equally important (11 per cent). As Figure 30 illustrates, other options, although desirable by some guests, were less popular.

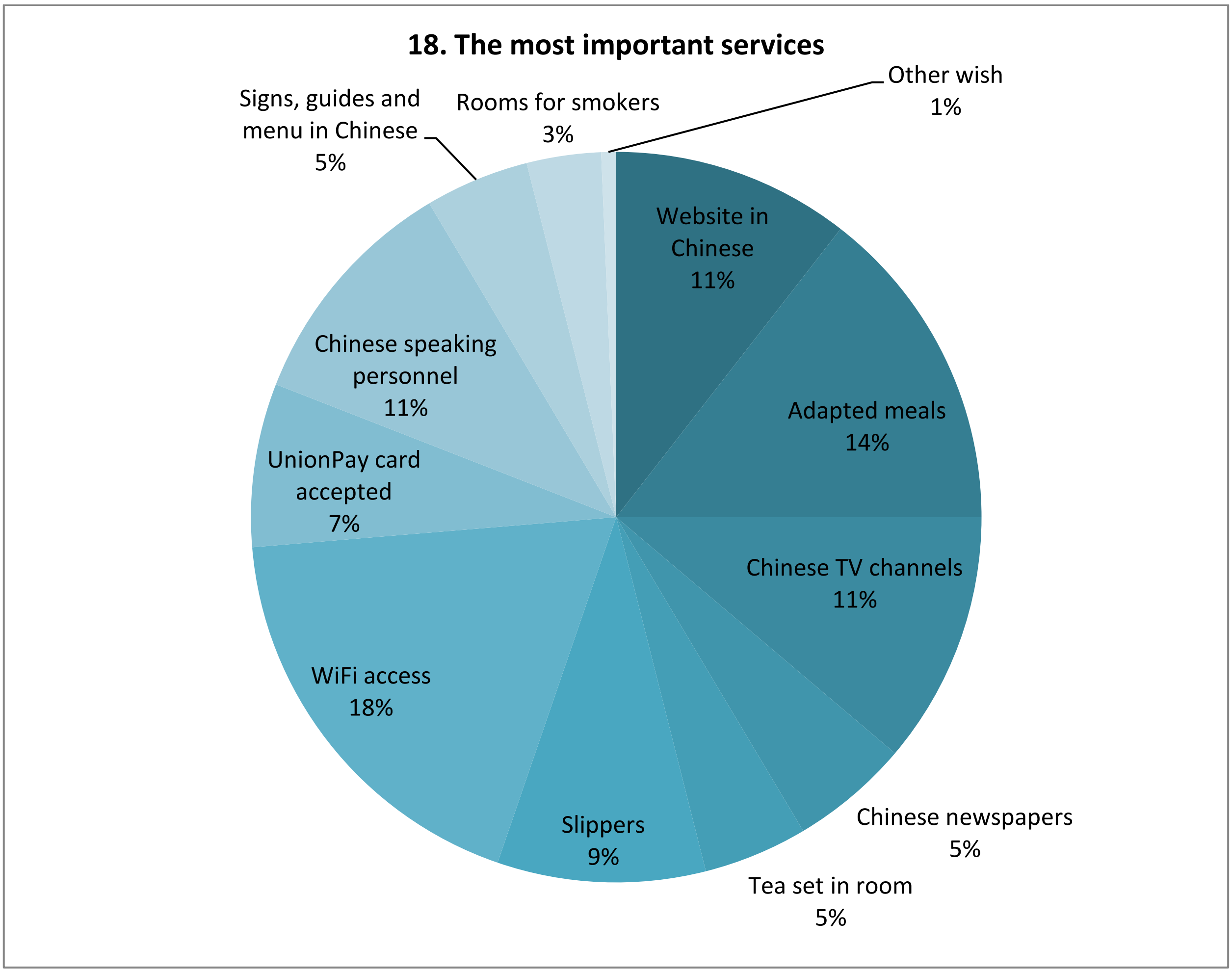

Figure 30 Important hotel services

(Q19) How likely is that Chinese tourists would choose a "China Friendly" programme member hotel with service adapted for guests from China, in otherwise equal conditions? Nearly a half of the sample who responded to this question (65 from 75 people) would certainly opt for a "China Friendly" hotel. The majority of respondents (77 percent) would be more inclined to choose the adapted service than not. See Figure 31 for the share of other answer choices.

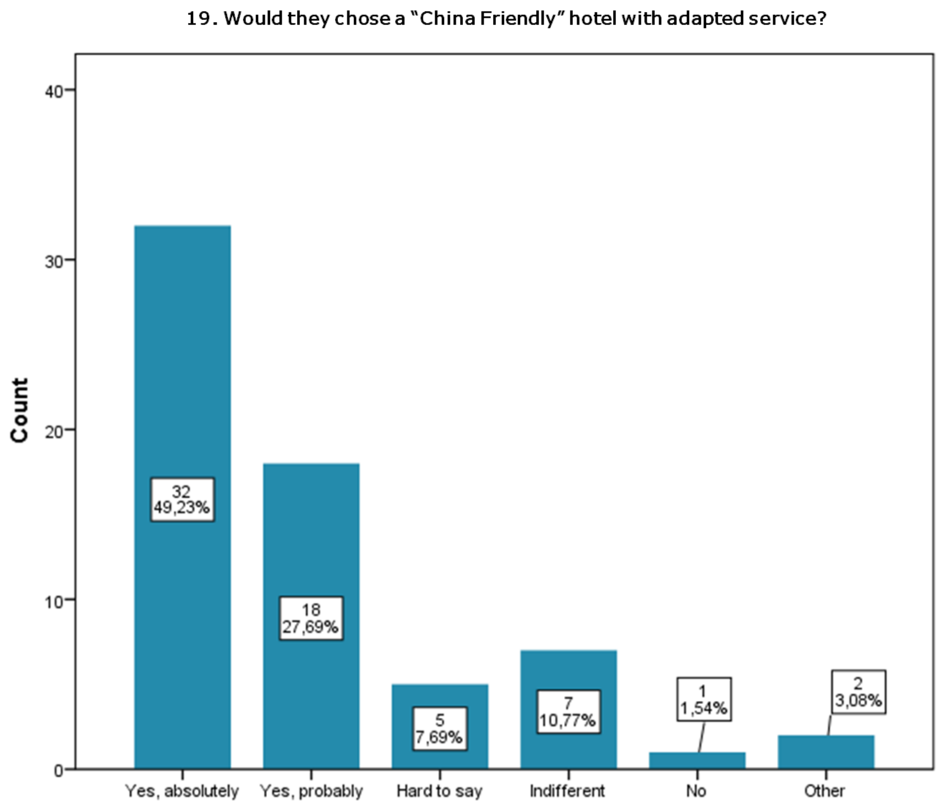

Figure 31 "China Friendly" preferences

(Q20) A third of the tourists from the sample brought souvenirs from Moscow, while 16. 7 per cent of respondents did not have the intention to do shopping. Most of the tourists did not shop for everyday items, clothes or jewellery (see Figure 32).

20. What did they purchase in Moscow

		Responses N	Responses Percent	Percent of Cases
Shopping in Moscow[a]	Souvenirs	29	34,5%	46,0%
	Local food	10	11,9%	15,9%
	Clothes or shoes	4	4,8%	6,3%
	Cosmetics/ household chemicals	4	4,8%	6,3%
	Decor or jewellery items	6	7,1%	9,5%
	Amber, precious stones	11	13,1%	17,5%
	Art	5	6,0%	7,9%
	Something else	1	1,2%	1,6%
	Did not do shopping	14	16,7%	22,2%
Total		84	100,0%	133,3%

a. Dichotomy group tabulated at value 1.

Figure 32 Purchases in Moscow

(Q21) The members of the sample were not actively willing to share their intention to leave the review of their trip. This question received only 59 valid responses. Approximately half of them would leave a review of their trip on some form, while another half would not. Figure 33 presents an overview of all answer options.

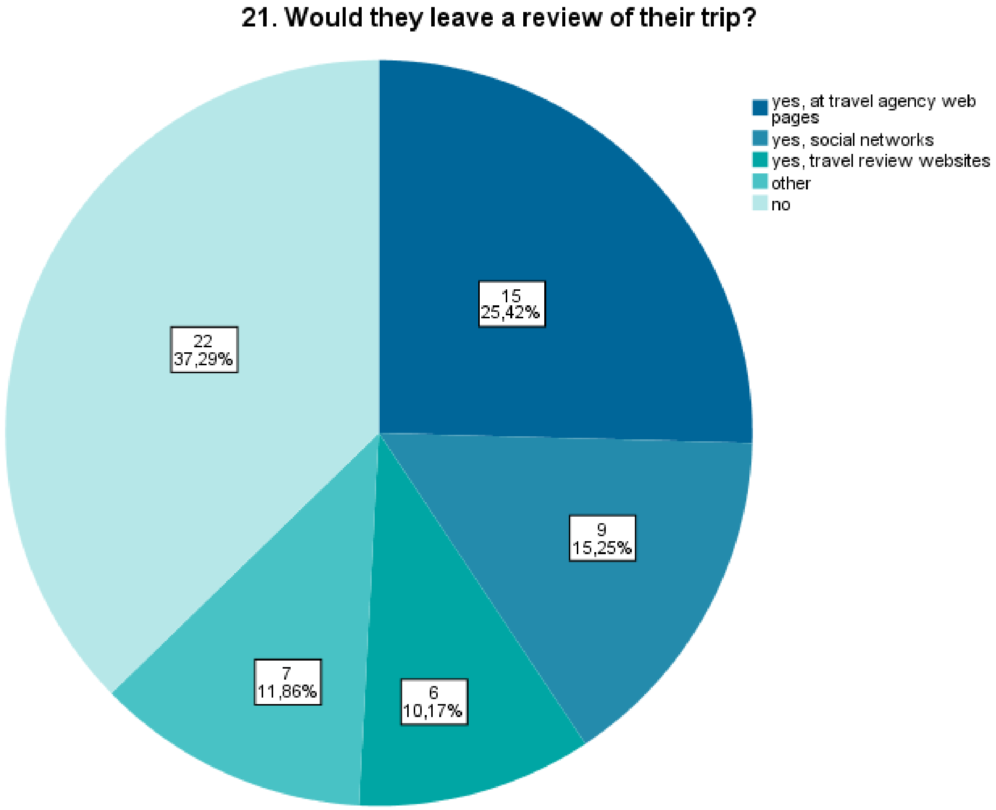

Figure 33 Intention to leave a review

(Q22) The top-three social networks that Chinese guests from the sample use to share their travel experiences were, in descending order: WeChat, Weibo and QQ. Other answer options were underrepresented (see Figure 34 on the next page for details).

(Q23) Three quarters of people from the sample gave their trip to Moscow a score on a scale of 1 to 10 where 10 was “very satisfied” or “excellent” and 1 – “very dissatisfied”, “very poor”. The percentage of dissatisfied visitors was low – only 1.8 of responses. As the bar chart (Figure 35) shows, the majority of the respondents rated their experience from good to excellent. A third of the respondents gave Moscow 10, the highest score and more than a quarter assessed the trip as “very good”.

22. Which social networks do they use to share their travel experiences?

		Responses		Percent of Cases
		N	Percent	
Social networks[a]	Weibo	18	22,5%	28,1%
	WeChat	35	43,8%	54,7%
	QQ	11	13,8%	17,2%
	Youku	1	1,3%	1,6%
	Mafengwo	3	3,8%	4,7%
	Meipai	3	3,8%	4,7%
	Other	3	3,8%	4,7%
	Nothing from above	6	7,5%	9,4%
Total		80	100,0%	125,0%

a. Dichotomy group tabulated at value 1.

Figure 34 Chinese social networks

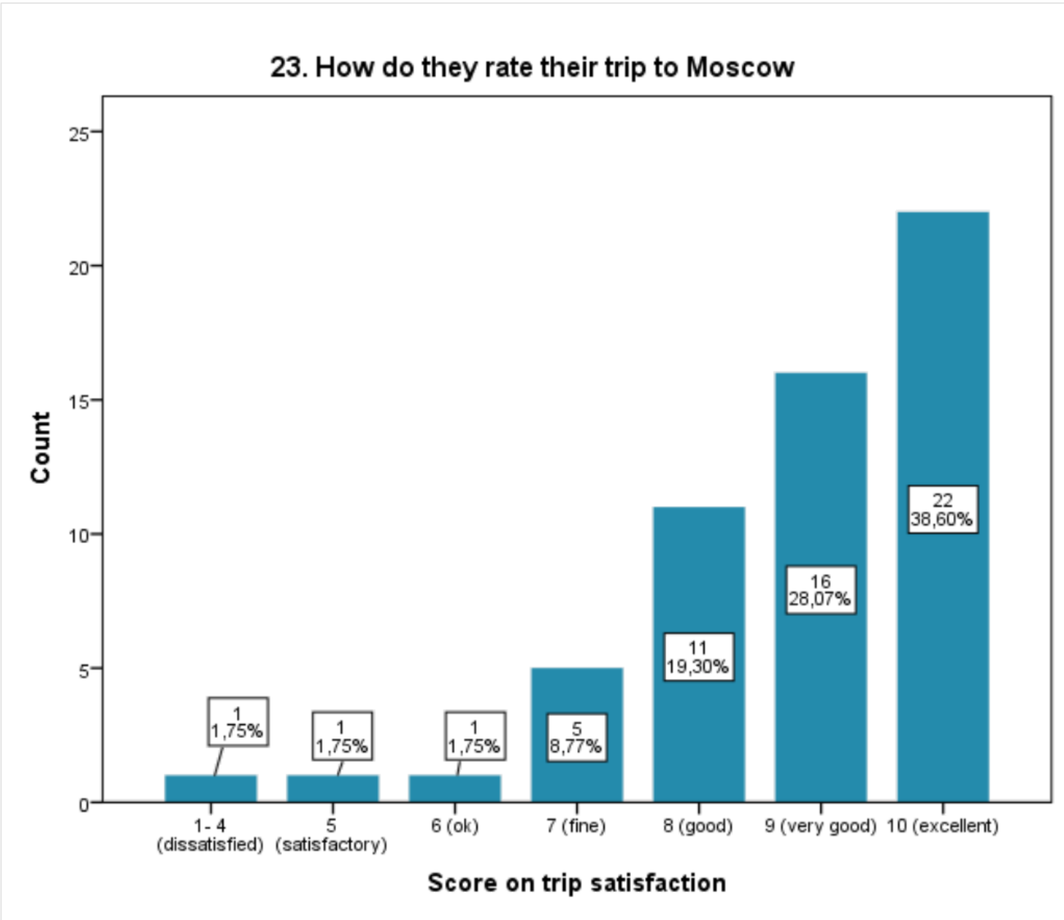

Figure 35 Trip satisfaction score

(Q24) The next question "Would you recommend Russia as a travel destination to your friends and family" suggested a scale from 1 to 10, where score 1 meant "Absolutely not" and 10 – "Yes, definitely". This question was analyzed with a Net Promoter Score, a method developed by Destination British Columbia. Net Promoter Score Index is calculated in order to identify the percentage of visitors who are likely to act as a destination's "promoters" versus its "detractors" (Destination British Columbia 2016, p. 9). Following the suggested framework of this method, the author firstly summarized all responses with the same frequency analysis, the results of which are given in Figure 36.

24. How likely are the tourists to recommend Russia to others

		Frequency	Percent	Valid Percent	Cumulative Percent
Score	3	1	1,3	1,7	1,7
	5	1	1,3	1,7	3,4
	6	1	1,3	1,7	5,1
	7	5	6,7	8,5	13,6
	8	11	14,7	18,6	32,2
	9	10	13,3	16,9	49,2
	10	30	40,0	50,8	100,0
	Total	59	78,7	100,0	
Missing	System	16	21,3		
Total		75	100,0		

Figure 36 Likely to recommend

Then, the method suggested removing the invalid or missing responses from the statistic. The SPSS software performs this function by default and the valid percentage can be seen from the same table highlighted in blue colour (Figure 36). The index was calculated on the basis of 59 valid responses.

The next step was to assign each response category a NPS category. This was done by creating a new variable "NPS Index" and recoding the data so that responses with scores 1 – 6 were placed into a category "Detractors", 7 – 8 into "Passives" and 9 – 10 into "Promoters". The proportion of the responses in each NPS category was summed and the result can be seen under Valid Percent in Figure 37.

NPS Categories

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Detractors	3	4,0	5,1	5,1
	Passives	16	21,3	27,1	32,2
	Promoters	40	53,3	67,8	100,0
	Total	59	78,7	100,0	
Missing	System	16	21,3		
Total		75	100,0		

Figure 37 NPS index categories

To calculate the NPS index, the proportion of detractors was discounted from the proportion of promoters. NPS index of the Chinese visitors to Moscow, therefore, is equal to 63 points.

(Q25) The last question asked the tourists to tell whether or not they were likely to visit Russia again in five years, also on a scale 1 – 10, where 10 was – very likely and 1 – absolutely not. Nearly half of the respondents stated that they were very likely to make a return trip in a five-year period, as can be seen from Figure 38.

25. How likely are they to visit Russia again in 5 years?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	2	2,7	3,6	3,6
	3	2	2,7	3,6	7,1
	4	2	2,7	3,6	10,7
	5	4	5,3	7,1	17,9
	6	7	9,3	12,5	30,4
	7	2	2,7	3,6	33,9
	8	7	9,3	12,5	46,4
	9	4	5,3	7,1	53,6
	10	26	34,7	46,4	100,0
	Total	56	74,7	100,0	
Missing	System	19	25,3		
Total		75	100,0		

Figure 38 Intention to come back in 5 years

For a more detailed picture, the author created new categories for this answer, too. Responses with a score 1 – 6 were placed into category "Single visit", 7 – 8 – into "Interested" and 9 – 10 into "Loyal". The ones "loyal" are not necessary already loyal to the destination, however, their high score indicates their intention and willingness to come back, while "interested" group members remain, in fact, undecided. The results show that more than half of Chinese visitors to Moscow have an intention to return to Russia in five years (Figure 39).

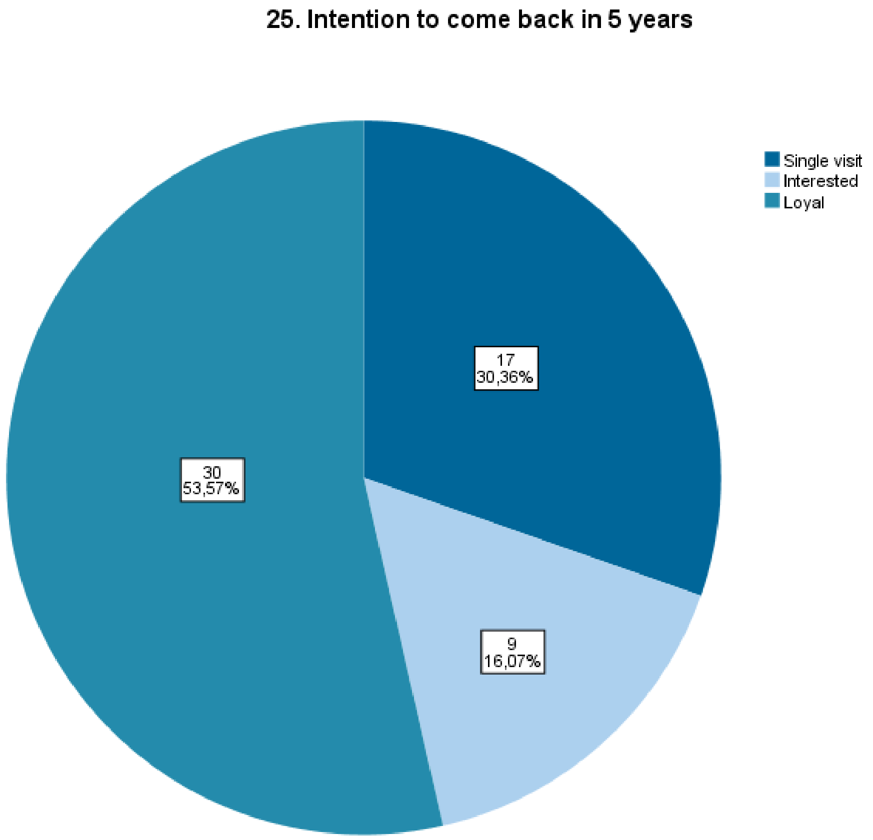

Figure 39 Potential return visitors in categories

It would be beneficial to consider the characteristics of “Interested” segment further for marketing purposes, in order to discover the ways to convince them to make a return trip. However, only 9 people belonged to this group which is an insufficient number for a separate analysis. Fortunately, some of the answers form groups of people large enough to be analyzed and tested for correlation separately in the next part of the data analysis.

6.2.4 Correlations in the data

The data was tested according to the instructions of Saimaa University of Applied Sciences Marketing research and research methods manual (Mirola n.y.b). All further references related to the procedure of statistical testing made in this section of the thesis report rely on this source.

The analysis used the steps of hypothesis testing (Mirola n.y. b, p. 49). At first, null hypothesis was stated as “two tested variables are independent” as well as alternative hypothesis “one variable affects the other one in a way”. After the level of each variable measurement was determined, the choice of testing was made. Most of the data was nominal (categorical), so a cross tabulation with Pearson’s Chi-Square test was applied.

For dichotomous variables with low number of responses to individual answer categories Fisher's exact test was used instead. Interval and ratio level data was firstly tested for normal distribution to decide whether parametric on non-parametric test could be used. The results of the selected tests showed the observed level of significance. On the basis of this figure, statistical decision was made whether the null hypothesis could be rejected for each case. The results were then interpreted and presented in charts.

The first test aimed to find out whether age group affected the willingness to travel with an organized travel group. Three age groups were analyzed instead of the original six by creating a new variable **Age group**. The three groups were named: **Young** (Less than 14 years old – 34 years old), **Middle Age** (35 – 50 years old) and **Senior** (51 years old – more than 61 years old).

Two variables, **age group** and **group traveller** were examined with cross tabulation. The results show that there was a difference in expected and actual count (see Figure 40).

Age group * Group traveller Cross tabulation

			Group traveller		
			yes	no	Total
Age group	Young	Count	6	13	19
		Expected Count	14,3	4,8	19,0
	Middle Age	Count	16	4	20
		Expected Count	15,0	5,0	20,0
	Senior	Count	29	0	29
		Expected Count	21,8	7,3	29,0
Total		Count	51	17	68
		Expected Count	51,0	17,0	68,0

Figure 40 Age group*group traveller

The Chi-Square test revealed a level of significance smaller than 0. 001, therefore, the correlation observed between the variables exists and it is very strong (Figure 41).

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	29,039[a]	2	,000
Likelihood Ratio	32,763	2	,000
Linear-by-Linear Association	27,133	1	,000
N of Valid Cases	68		

a. 1 cells (16,7%) have expected count less than 5. The minimum expected count is 4,75.

Figure 41 Age*group Chi-Square test

Therefore, the null-hypothesis of the two variable's independence had to be rejected, and it became clear that age affects whether or not a person travels with a group. The bar chart below (Figure 42) illustrates this clearly: Chinese tourists in **Senior** age group were all group travellers, while younger travellers were travelling independently more often than with a group.

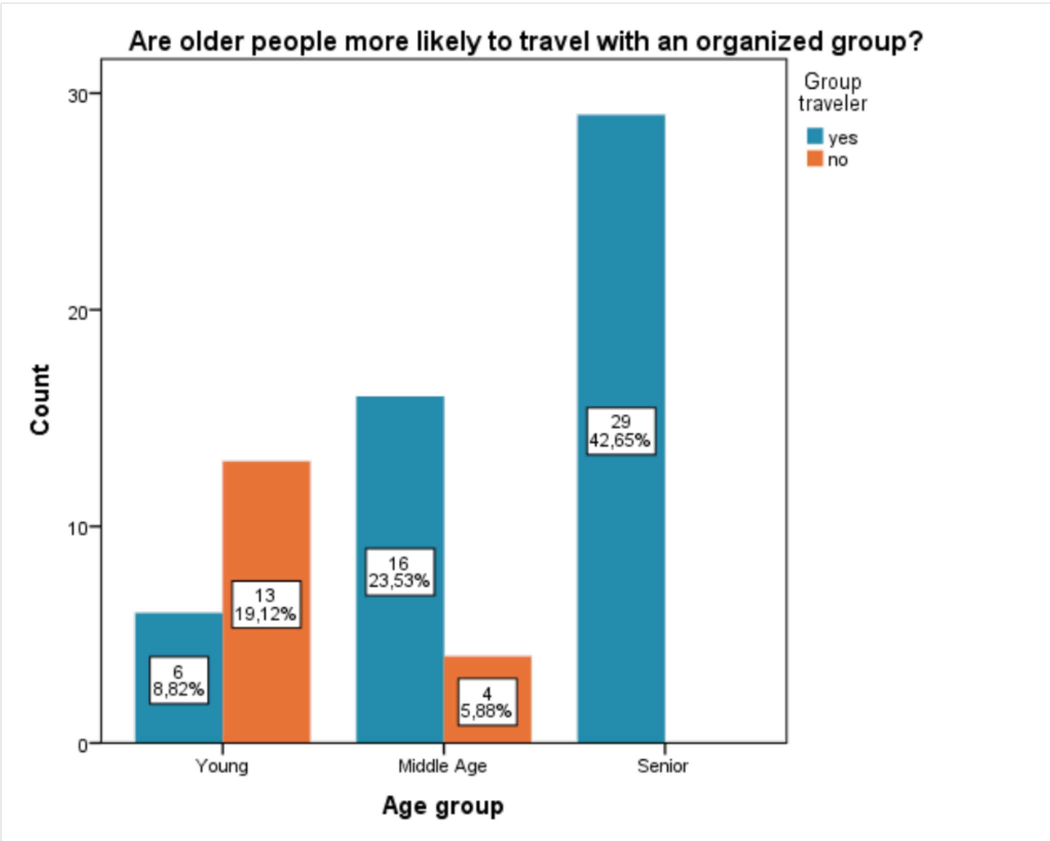

Figure 42 Age*group chart

The next test attempted to find out whether males were more likely to visit Russia with a business purpose. The number of females who visited Moscow with a business purpose was more than the number of male respondents (see Figure 43). Despite that fact, Pearson's Chi-Square test showed that the difference in the results of male and female respondents was not statistically significant (more than 0. 05).

Sex * Business Cross tabulation

			Business		Total
			not check	check	
Sex	male	Count	26	2	28
		Expected Count	23,0	5,0	28,0
	female	Count	29	10	39
		Expected Count	32,0	7,0	39,0
Total		Count	55	12	67
		Expected Count	55,0	12,0	67,0

Figure 43 Sex*Business cross tabulation

Another test looked for a potential correlation between a higher education level and the motivation to travel to Russia to learn more about its history and culture. To test the variable **Education**, the answer options were re-grouped into three groups by the level of education: **Basic,** which included primary and secondary school, **Professional** (further professional education, such as college) and **Academic** (studies leading to academic degree – higher education and PhD).

Chi-Square test revealed that **Education level** and **Interest to the History and culture of Russia** were dependent variables (see Figure 44, highlighted in blue). However, more than 20 per cent of cells with the data had the expected value count under 5 (see the footnote of Figure 44) meaning that the test results were not reliable enough. The proof of interdependence of the two variables could not be made for the sample and, consequently, for the population. However, it would be interesting to search for the same correlation in a larger sample size.

Chi-Square Tests	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	6,150[a]	2	,046
Likelihood Ratio	7,005	2	,030
Linear-by-Linear Association	5,898	1	,015
N of Valid Cases	71		

a. 2 cells (33, 3%) have expected count less than 5. The minimum expected count is 3,30.

Figure 44 Education*History Chi-Square test

The next question was formulated as whether or not travellers of certain occupations perceived higher language barrier than others before travelling to Russia. The bar chart (Figure 45) points out an unequal distribution of the perceived language barrier of respondents depending on their profession. Fewer tourists with a background in science and education perceived a language barrier when coming to Russia. Workers of trade sector and finances felt a higher language barrier, while the highest concerns about the language barrier where among respondents who selected the "other" occupation – it is likely that this number includes students and retired citizens.

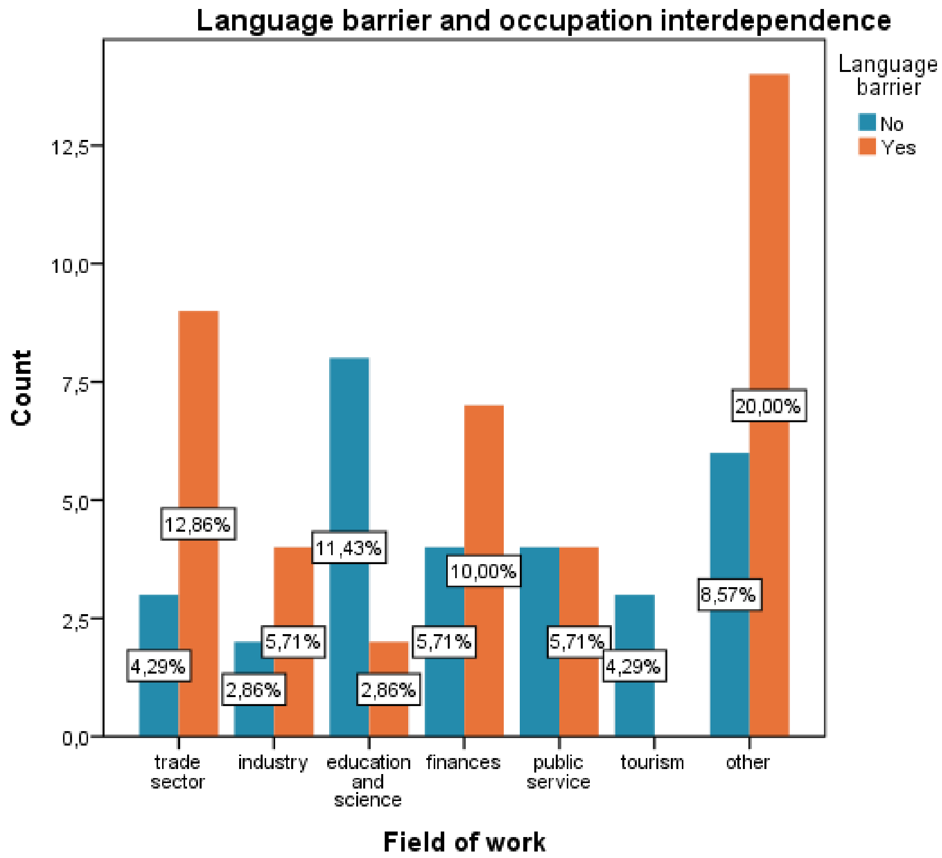

Figure 45 Language Barrier*Occupation chart

Even though the Chi-square test results confirmed that these variables were correlated at 0. 04 significance level, the expected count less than 5 was observed in more than 20 per cent of cells with the data. According to the rules of statistical testing, the result was, therefore, not reliable enough. This situation happens in case of small sample sizes and it often occurred for the sample researched in the thesis.

Next, the test was made to find out whether income level affected the number of nights spent in Moscow. The variables were transformed to create three groups by income level: **Low** (Less than 1000 RMB – 3000 RMB), **Medium** (3000 – 8000) and **High** (8000 – more than 12000 RMB). The dependent variable was ordinal level – the **number of nights** in Moscow with answer options 1, 2, 3, 4 and more, which presented an opportunity to apply a non-parametric test, namely Spearman's rank order correlation test. As Figure 46 demonstrates, no correlation exists between the two variables (statistical significance level is more than 0. 05). Therefore, income level does not affect the number of nights a guest stayed in Moscow.

Correlations

			Income Levels	Nights in Moscow
Spearman's rho	Income Levels	Correlation Coefficient	1,000	,230
		Sig. (2-tailed)	.	,072
		N	72	62
	Nights in Moscow	Correlation Coefficient	,230	1,000
		Sig. (2-tailed)	,072	.
		N	62	65

Figure 46 Income*Nights

It would be interesting to find out what kind of tourists choose to travel with an organized group. The data for the question number 7 about immediate traveller party of the visitor could not give reliable results after statistical testing with any other variable because several answer categories within the dataset were too small (even after the variable was transformed to contain four categories instead of the original seven).

One test, however, revealed a potential correlation that could exist had the sample been larger. When cross tabulation was applied to **travel party** and **group traveller** variables, the Chi-square test pointed at a 0. 005 significance level indicating that there was dependence between the two variables. The bar chart (Figure 47) below illustrates the trend: **families** (including: married couples, children under 14 years old and other family members) prefer to travel as a part of an organized group.

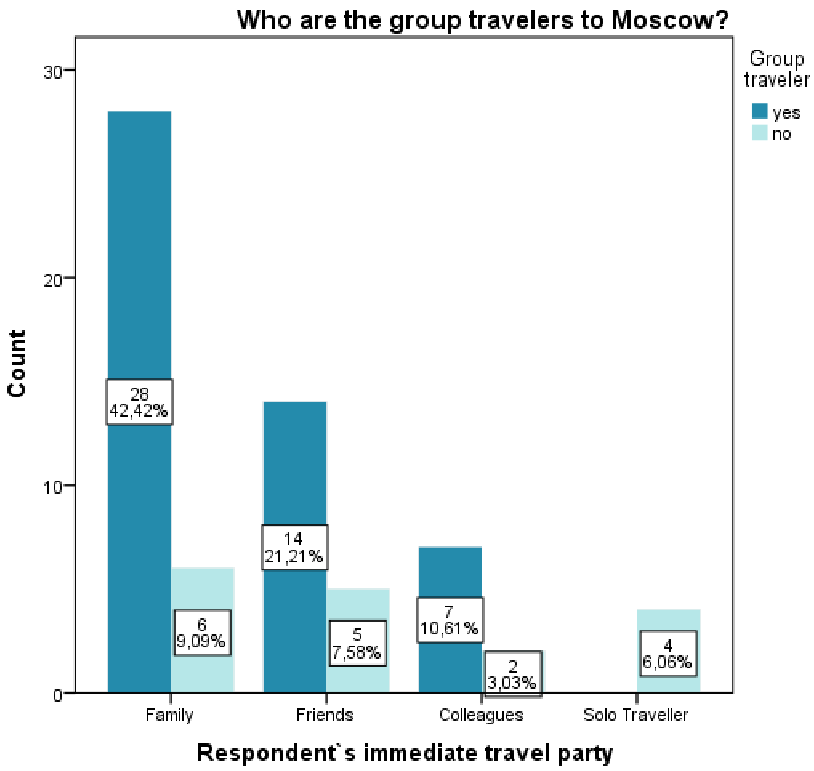

Figure 47 Group*Family chart

It is important to note that these results are just showing a potentially interesting correlation to look for in a further research but this result is not reliable for the researched sample due to the low level of response.

Next, the variables were checked for a potential correlation between first and second visit to Russia and travellers concerns, in other words, whether return visitors to Russia had less concerns before their trip than did first-time travellers. Each of the answer options of a multiple response question **Concerns before the trip** were considered as separate variables, namely: **language barrier**, **personal and property safety**, **cultural difference**, **service quality**, **incomprehensible signage** and **wellbeing**. Both independent and dependent variables were dichotomous (allowed only two answer options, yes or no), therefore, Fisher's exact test for smaller sample sizes could be applied. The test revealed the correlation between **first time traveller** and **language barrier** (see Figure 48, highlighted cells). Fewer return visitors reported to have a language barrier fear before going to Russia, as illustrated by the bar chart (Figure 49).

The test for other variables did not reveal a significant correlation; therefore, other concerns were independent of whether the traveller had been to Russia before or no.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	12,873[a]	1	,000		
Continuity Correction[b]	10,892	1	,001		
Likelihood Ratio	13,252	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	12,692	1	,000		
N of Valid Cases	71				

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 6,76.

b. Computed only for a 2x2 table

Figure 48 Concerns Fisher exact test

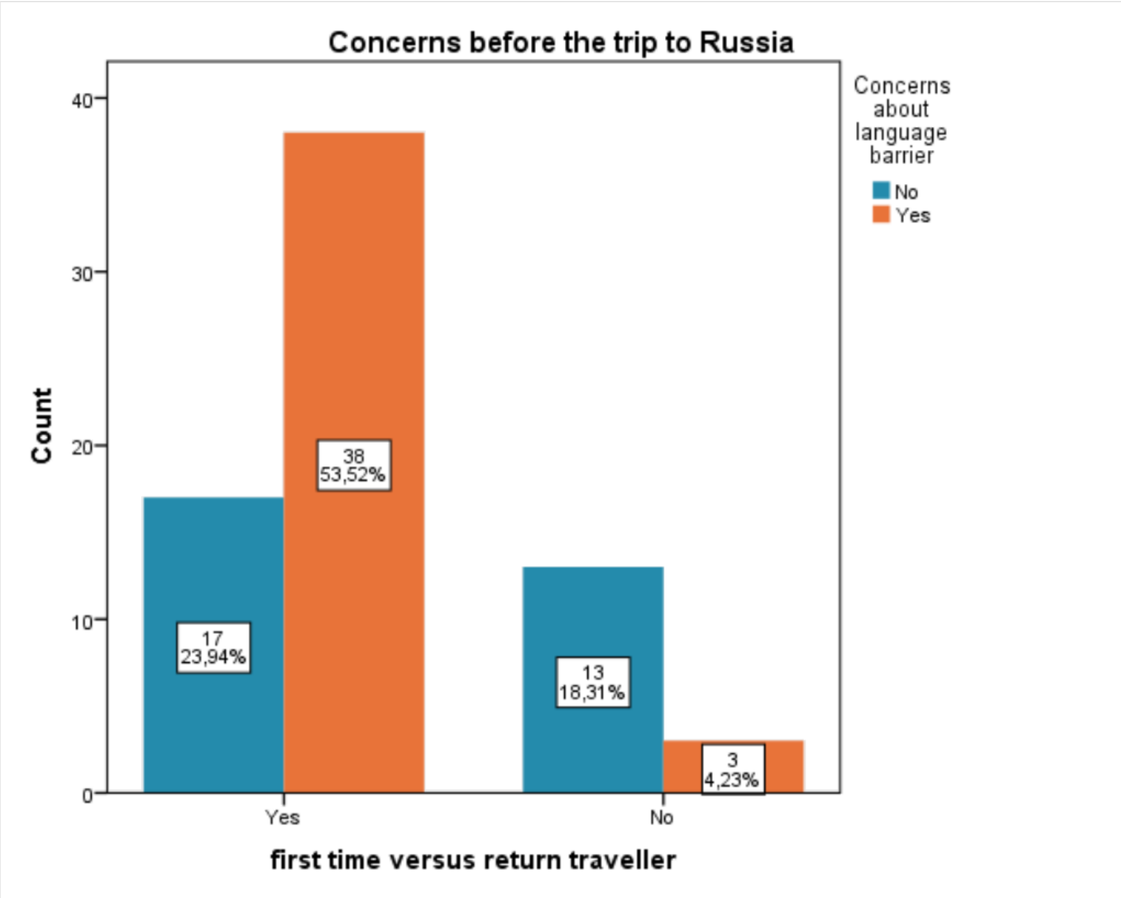

Figure 49 Concerns*First time traveller chart

Another test checked whether travellers whose main purpose of trip is entertainment showed higher preference of “China Friendly” accommodation with adapted service. The multiple response question **purpose of visit** was difficult to test because some of the answer variables contained too few respondents. The only category large enough for the analysis was **entertainment**, the choice of 30 respondents. The variable **entertainment** was tested separately from other response categories for the correlation with **“China Friendly” accommodation**. The alternative hypothesis was that the travellers with the purpose of entertainment might prefer service adapted for Chinese tourists to guarantee the smooth trip organization and maximize enjoyment without too many difficulties. The Chi-square test, however, showed that there was no such dependence between these two variables and visitors with other purposes (for example, business or sightseeing) were as likely to choose a “China Friendly” accommodation. The results of the Chi-square test are given in the table below (Figure 50).

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	5,329[a]	2	,070
Likelihood Ratio	5,499	2	,064
Linear-by-Linear Association	5,209	1	,022
N of Valid Cases	57		

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 5,89.

Figure 50 China Friendly*entertainment

It is possible that travellers of a certain age group are more likely to recommend trip to Russia to their friends. To find out whether or not such correlation exists, respondents of the sample were divided into two groups: organized group travellers and independent travellers. The test checked which of them were more likely to put higher scores on the 1 – 10 scale “Likely to recommend Russia to friends and family”. The variable was of a ratio level, therefore, a normality testing was done to find out whether a parametric or non-parametric test could be used. For the sample larger than 50 respondents a Kolmogorov-Smirnov test was used. The results of the test presented in the table 51 showed the significance level less than 0. 05. This indicates that the responses were not normally distributed and non-parametric test had to be used.

Tests of Normality

	Kolmogorov-Smirnov[a]			Shapiro-Wilk		
	Statistic	df	Sig.	Statistic	df	Sig.
Likely to recommend to friends	,278	59	,000	,749	59	,000

a. Lilliefors Significance Correction

Figure 51 Test of Normality Recommend to friends

Spearman’s rank order correlation test was used and it produced a 0.46 significance level. The negative correlation coefficient -0.28 identified that group travellers are more likely to recommend the trip to Russia to their friends than independent travellers.

The next test aimed to find out whether travellers inspired for the trip by a bargain deal from travel agency also reduced their expenses on shopping. Multiple answer question “What inspired you to travel to Russia” also produced too many categories with only a few respondents in them. All answer options were analyzed separately as individual variables with a Fisher’s exact test. A variable **bargain deal from travel agency** was tested with **no shopping** from a question 20 about purchases in Moscow. An assumption was made that travellers whose main motivation was the cost of the trip could cut the expenses on shopping. However, Fisher’s test showed a significance more than 0. 05; therefore, the assumption had to be rejected: bargain trip hunters still wanted to do shopping in Moscow.

Does the planning time of the trip affect the chosen category of accommodation? To find out, **planning** and **accommodation** variables were tested for correlation. Both variables were of the ordinal scale, therefore, Spearman’s rank order correlation test was applied. The test revealed that there was no dependence between these two variables as the significance level was exceeding 0. 05. Thus, careful planners and last-minute adventurers of the sample could have easily selected the same category of accommodation.

The next test analyzed whether people who used social networks to plan their trip also shared their trip experience in social networks more eagerly. Questions “What helped you to plan your visit to Russia” and “On which social networks will you share your travel experience” both provided multiple response options. However, individual answer categories contained not enough respondents for statistical testing. Therefore, only one answer option from **planning** question – social networks – was tested for correlation with three social networks that were the most popular answer choice for the question about **sharing**. The variables were tested with Fisher’s exact test.

The test results (see Figure 52) showed a significance of 0. 036 with a social network Weibo, meaning that Chinese guests who used social networks to plan their visit to Russia were more likely to share their own travel experiences in Weibo. Interestingly, the test did not show the same correlation with other popular Chinese social networks WeChat and QQ.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	5,624[a]	1	,018		
Continuity Correction[b]	3,545	1	,060		
Likelihood Ratio	4,860	1	,027		
Fisher's Exact Test				,036	,036
Linear-by-Linear Association	5,531	1	,019		
N of Valid Cases	61				

a. 2 cells (50,0%) have expected count less than 5. The minimum expected count is 1,57.

b. Computed only for a 2x2 table

Figure 52 Social networks Fisher's exact test

The next step was to check whether language barrier and concerns about safety were the main reasons to choose a "China Friendly" hotel. The variables **language barrier** and **personal and property safety**, were the most popular answer options to the question about travellers' concerns. They were compared with the **preference of "China Friendly"** adapted accommodation. In both cases Pearson's Chi-square test did not show statistically significant dependency. Therefore, although language barrier and concerns about safety could be the additional reasons for travellers to choose "China Friendly" accommodation, they are not the most important. It would be interesting to find out whether perceived **cultural difference** influenced the choice of "China Friendly" accommodation, however, this answer option did not get enough responses within the sample.

The next survey question about websites that tourists used to plan their visit was a challenge since neither of the answer options got enough respondents and statistical testing did not produce any reliable and meaningful result. One interesting pattern was observed with testing with preference of "China Friendly" accommodation. The results of the testing are presented in the bar chart (Figure 53), from which it can be seen that users of Ctrip website were often likely to prefer "China Friendly" accommodation, and so were the people who did not use any websites at all. This was not a statistically reliable result for the sample but the observations might give a hint that "China Friendly" can be marketed on certain Chinese online travel websites more successfully than on the others.

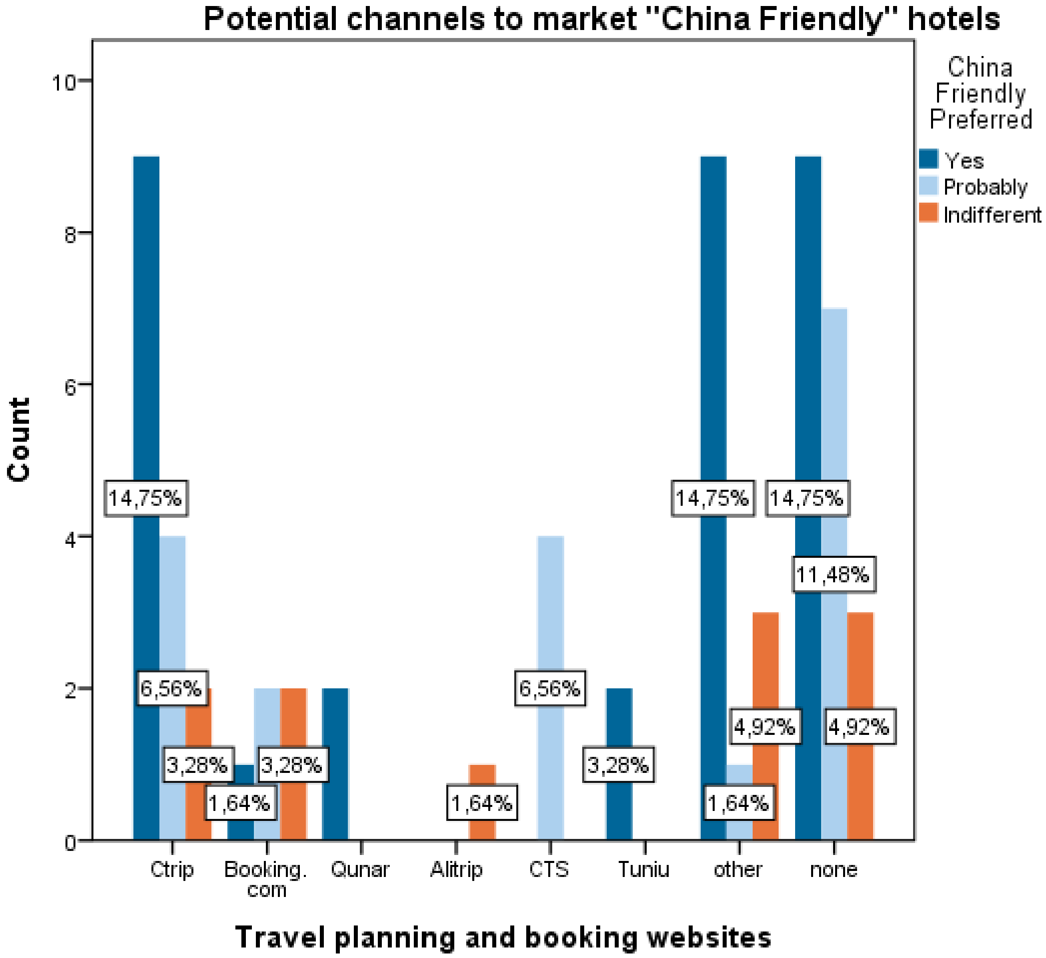

Figure 53 China Friendly*Planning chart

Next, **Hotel category** was tested for a correlation with the willingness to visit Russia again in five years, on a scale from 1 – 10. A scale level variable **Come back in five years** was firstly tested for normal distribution. A Kolmogorov-Smirnov test showed that the distribution was not normal. Therefore, a non-parametric test had to be used. Spearman's rank order correlation test was applied and it showed a statistically significant result at 0. 001 significance level. Figure 54 presents the result of the test.

One should not be confused with the negative correlation coefficient -0. 559: it appeared because a 5 star hotel was coded as "1" in the data and all the lower accommodation categories received "higher" ranks. A correct interpretation of the test would be, thus, that tourists who stayed at five star hotels are more likely to return within five years than those who stayed at 1 or 2 star hotels.

Correlations

			Come back in 5 years	Accommodation category
Spearman's rho	Come back in 5 years	Correlation Coefficient	1,000	-,559**
		Sig. (2-tailed)	.	,000
		N	56	56
	Accommodation category	Correlation Coefficient	-,559**	1,000
		Sig. (2-tailed)	,000	.
		N	56	62

**. Correlation is significant at the 0.01 level (2-tailed).

Figure 54 Spearman's rho test Return*Accommodation

Another dependent variable tested was **Rate the trip to Moscow** from 1 – 10. This variable was also not normally distributed, and Spearman's rank order correlation revealed a dependence of the variables. Figure 55 should be interpreted as "Chinese tourists who stayed at a five-star hotel were more satisfied with their Moscow experience than those who stayed at a 1 or 2 star hotel".

Correlations

			Accommodation category	Rate trip to Moscow
Spearman's rho	Accommodation category	Correlation Coefficient	1,000	-,353**
		Sig. (2-tailed)	.	,007
		N	62	57
	Rate trip to Moscow	Correlation Coefficient	-,353**	1,000
		Sig. (2-tailed)	,007	.
		N	57	57

**. Correlation is significant at the 0.01 level (2-tailed).

Figure 55 Spearman's rho test Satisfaction*Accommodation

Could that be that tourists who spent more nights in Moscow more willing to visit Russia again? To answer this question, two scale-level variables were tested for correlation: number of **nights in Moscow** and willingness to **come back in five years**. Spearman's rank order correlation was used and the result given in the Figure 56 should be interpreted as "Chinese tourists who spent more nights in Moscow are more likely to come back to Russia than those who stayed for one night only".

Correlations

			Nights in Moscow	Come back in 5 years
Spearman's rho	Nights in Moscow	Correlation Coefficient	1,000	,406**
		Sig. (2-tailed)	.	,002
		N	65	56
	Come back in 5 years	Correlation Coefficient	,406**	1,000
		Sig. (2-tailed)	,002	.
		N	56	56

**. Correlation is significant at the 0.01 level (2-tailed).

Figure 56 Spearman's rho test Nights*Come back

The next test attempted to reveal what services should a "China Friendly" hotel offer to be popular among Chinese tourists. The cross tabulation table was created to show the most important services to Chinese tourists of the sample in terms of number and percentage from the total number of respondents – and also from the number of respondents who would choose a "China Friendly" hotel over a not certified hotel. In the table with cross tabulation (Figure 57) several important pieces of data are highlighted in deep orange. They show the most popular services that are chosen by people who would also most likely stay at "China Friendly" hotels: **Website in Chinese**, **Adapted meals**, **Chinese TV Channels** and **WiFi** connection. Percentages significant for either their place in the service list or from potential "China Friendly" customers are highlighted in light blue. It is important, however, that overall number of responses within categories does not allow making generalizations beyond the analyzed sample.

$Service*ChinaFriendly Crosstabulation[a]

			China Friendly Preferred			
			Yes	Probably	Indifferent	Total
Important services[b]	Website in Chinese	Count	11	3	2	16
		% within $Service	68,8%	18,8%	12,5%	
		% within ChinaFriendly	14,9%	7,7%	5,1%	
		% of Total	7,2%	2,0%	1,3%	10,5%
	adapted meals	Count	11	6	5	22

	% within $Service	50,0%	27,3%	22,7%	
	% within ChinaFriendly	14,9%	15,4%	12,8%	
	% of Total	7,2%	3,9%	3,3%	14,5%
Chinese TV channels	Count	8	6	3	17
	% within $Service	47,1%	35,3%	17,6%	
	% within ChinaFriendly	10,8%	15,4%	7,7%	
	% of Total	5,3%	3,9%	2,0%	11,2%
Chinese newspapers	Count	4	1	3	8
	% within $Service	50,0%	12,5%	37,5%	
	% within ChinaFriendly	5,4%	2,6%	7,7%	
	% of Total	2,6%	0,7%	2,0%	5,3%
Tea set in room	Count	2	2	3	7
	% within $Service	28,6%	28,6%	42,9%	
	% within ChinaFriendly	2,7%	5,1%	7,7%	
	% of Total	1,3%	1,3%	2,0%	4,6%
Slippers	Count	9	2	3	14
	% within $Service	64,3%	14,3%	21,4%	
	% within ChinaFriendly	12,2%	5,1%	7,7%	
	% of Total	5,9%	1,3%	2,0%	9,2%
WiFi access	Count	12	8	8	28
	% within $Service	42,9%	28,6%	28,6%	
	% within ChinaFriendly	16,2%	20,5%	20,5%	
	% of Total	7,9%	5,3%	5,3%	18,4%
UnionPay card accepted	Count	5	2	4	11
	% within $Service	45,5%	18,2%	36,4%	
	% within ChinaFriendly	6,8%	5,1%	10,3%	
	% of Total	3,3%	1,3%	2,6%	7,2%

	Chinese speaking personnel	Count	9	5	2	16
		% within $Service	56,3%	31,3%	12,5%	
		% within ChinaFriendly	12,2%	12,8%	5,1%	
		% of Total	5,9%	3,3%	1,3%	10,5%
	signs guides and menu in Chinese	Count	1	1	5	7
		% within $Service	14,3%	14,3%	71,4%	
		% within ChinaFriendly	1,4%	2,6%	12,8%	
		% of Total	0,7%	0,7%	3,3%	4,6%
	rooms for smokers	Count	2	2	1	5
		% within $Service	40,0%	40,0%	20,0%	
		% within ChinaFriendly	2,7%	5,1%	2,6%	
		% of Total	1,3%	1,3%	0,7%	3,3%
	other wish	Count	0	1	0	1
		% within $Service	0,0%	100,0%	0,0%	
		% within ChinaFriendly	0,0%	2,6%	0,0%	
		% of Total	0,0%	0,7%	0,0%	0,7%
Total		Count	74	39	39	152
		% of Total	48,7%	25,7%	25,7%	100,0%

Percentages and totals are based on responses.

a. There are not enough (less than 2) multiple response groups for pairing. Percentages are based on responses, but no pairing is performed.

b. Dichotomy group tabulated at value 1.

Figure 57 Service*China Friendly Cross Tabulation

The next test aimed to find out whether a Chinese tourist who was interested in “China Friendly” accommodation was more likely join an organized group tour to Russia. Several answer categories in the data did not have enough responses; therefore, the observations cannot describe the behaviour of the whole population. In the sample, as Figure 58 illustrates, quite often the respondents who stated they would prefer a “China Friendly” hotel were members of the organized group. There is no reliable statistical evidence, however, that preferences in service would always influence the decision to travel with a group.

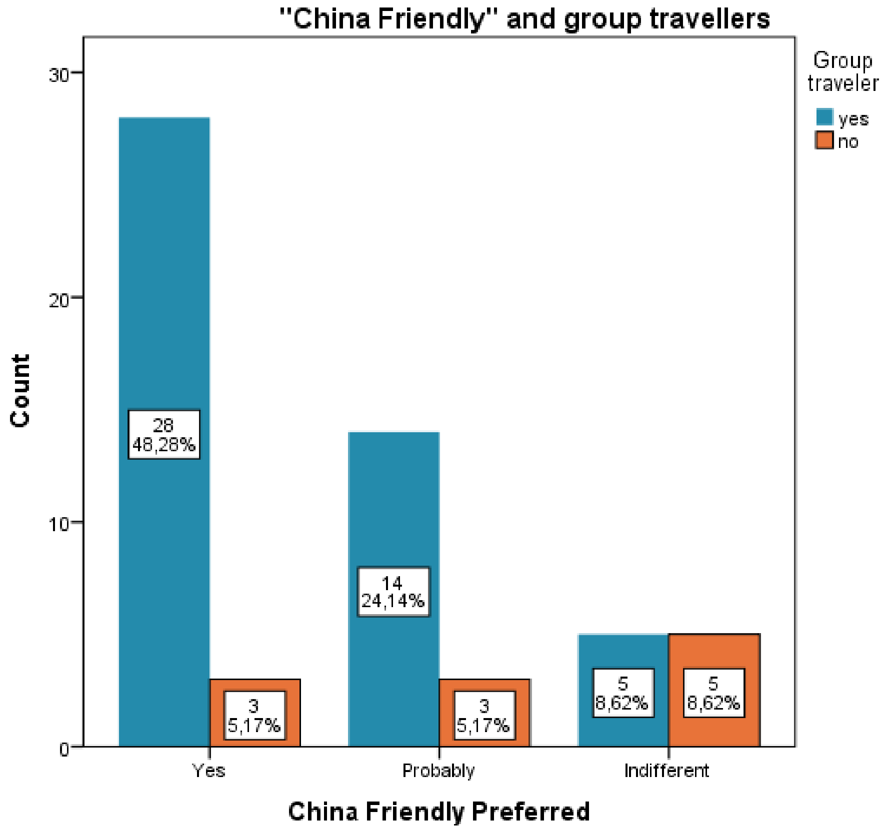

Figure 58 China Friendly*Group

To analyze if the willingness the customers who favour “China Friendly” adaptation were more willing to leave review of their trip to Moscow another test was done. **Trip review** variable was transformed to contain only two answer options: “yes” (in any channel) and “no”. Pearson’s Chi-square test analyzed the variable’s dependence on “**China Friendly” preference** and showed a statistically significant result at 0. 037. The visual interpretation of the test (see Figure 59) suggests that people who find adaptation of service important are more likely to give a review of their trip.

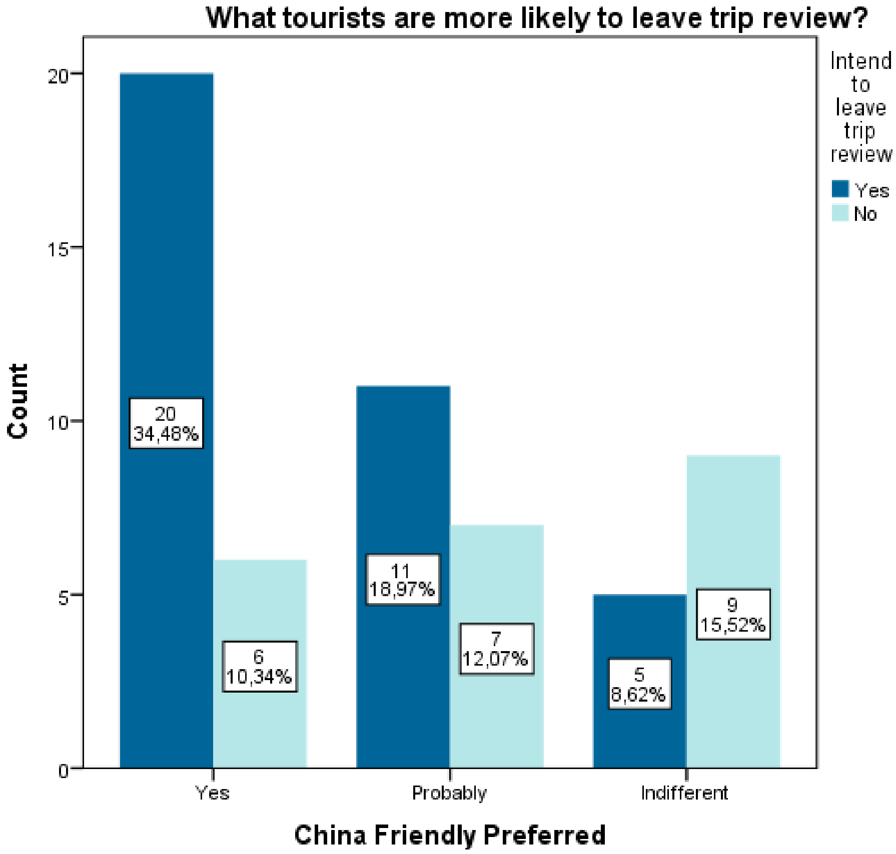

Figure 59 China Friendly*Review chart

The reason for this correlation is not obvious. One explanation could be psychological: people who conform to certain service standards also conform more willingly if a travel company asks them to review their trip. On the contrary, travelers with an independent mindset make their own conclusions and judgments but refuse to spend time reviewing their trip online.

Another explanation could be that less experienced travelers might be more interested in writing their review and share their first travel experiences with the world. These people might also feel less secure against the unpredictable environment of a foreign country and consider service adaptation useful. However, a frequent traveler is more open to new experiences and adventures, and at the same time he or she perceives writing a review for each trip as an unnecessary routine. The survey did not ask the tourists about their travel experience except Russia; therefore, this explanation cannot be proved by further testing of the data.

Decoration and everyday life items made out of amber are the popular Moscow souvenirs. Do Chinese tourists often include amber in their souvenir list for friends and family? **Souvenirs** and **amber** were both dichotomous variables with answer options "purchased" and "not purchased" and Fisher's exact test was applied to find out whether a correlation existed between them. The test did not show a statistically significant correlation, therefore, some tourists might buy amber in addition to other souvenirs but each of the items might as likely be purchased individually.

Next, each of the social networks popular among the sample respondents was tested with Fisher's exact test to find out whether or not these variables depend on the intention to leave a trip review of the same respondent. The test revealed that these variables were independent and respondents could leave trip review online but not share in either of the social networks or vice versa.

For marketing purposes it would be useful to know if users of WeChat/ Weibo social networks tend to belong to a certain age group. Variables **Age group** (a three age category version was used) and **Share on WeChat/Weibo** were tested with a Pearson Chi-Square. The test showed that there was no correlation between these variables as statistical significance was over 0. 05 (0.314 level for Weibo and 0.278 level for WeChat). Figure 60 (for Weibo) and Figure 61 (for WeChat) show the age distribution of the social network users.

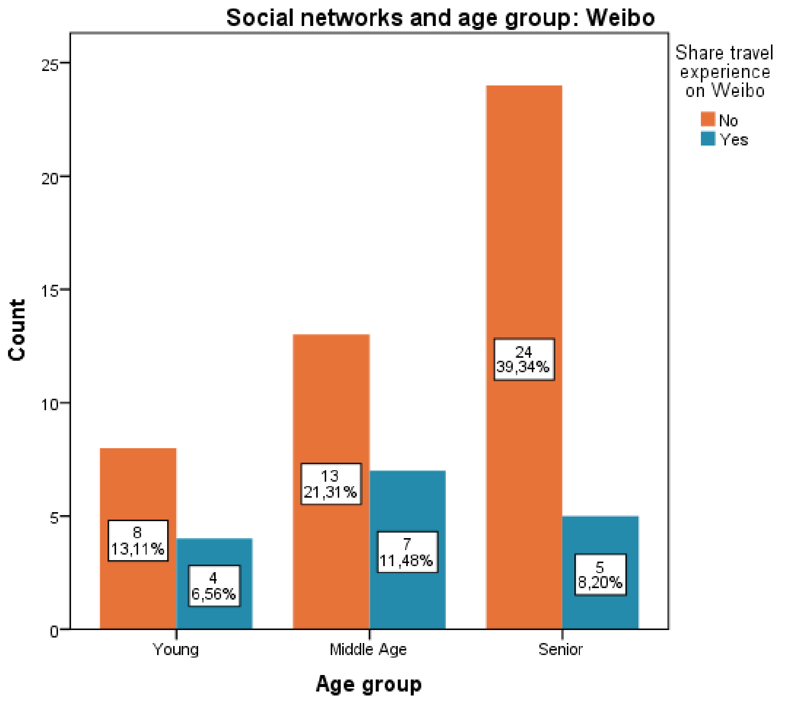

Figure 60 Weibo*age

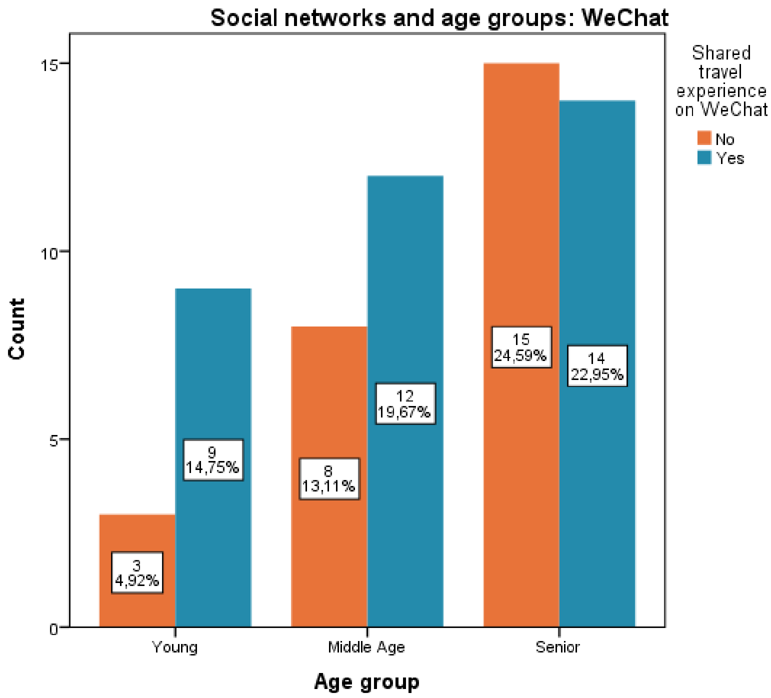

Figure 61 WeChat*age

Three remaining variables **Rate trip to Moscow**, **Recommend Russia to friends** and **Come back in five years** were scale-level, not normally distributed. A non-parametric test Spearman's rank order correlation was used to test them for a possible correlation with other variables.

As Figure 62 illustrates, the higher the satisfaction score to Moscow was, the more the respondent was willing to visit Russia again.

Correlations

			Rate trip to Moscow	Come back in 5 years
Spearman's rho	Rate trip to Moscow	Correlation Coefficient	1,000	,552**
		Sig. (2-tailed)	.	,000
		N	57	54
	Come back in 5 years	Correlation Coefficient	,552**	1,000
		Sig. (2-tailed)	,000	.
		N	54	56

**. Correlation is significant at the 0.01 level (2-tailed).

Figure 62 Spearman's rho test Satisfaction*Come Back

For the next test an assumption was made that the guests who stayed at five-star hotels were more likely to recommend Russia to friends than those who stayed at lower category hotels. The assumption was supported by the statistical test results. An average correlation of -0.401 exists between the chosen hotel category of a tourist and his or her willingness to recommend Russia to friends and family (Figure 63).

Correlations

			Likely to recommend to friends	Accommodation category
Spearman's rho	Likely to recommend to friends	Correlation Coefficient	1,000	-,401**
		Sig. (2-tailed)	.	,002
		N	59	59
	Accommodation category	Correlation Coefficient	-,401**	1,000
		Sig. (2-tailed)	,002	.
		N	59	62

**. Correlation is significant at the 0.01 level (2-tailed).

Figure 63 Spearman's rho test Recommend*Accommodation

Negative correlation coefficient should not confuse the reader: it appeared because of the specific of numeric coding of the answers (see testing in question 15 above for the explanation).

Several important results of the data analysis are summarized below. More detailed commentary on the process and outcomes of data analysis will be given in Chapters Conclusion and Evaluation of the research.

Some of the answer categories contained too few respondents (below 30) and cannot be projected on the entire population beyond the sample. Still, on the basis of the analysis, a few projections can be made for the population.

First observation is that senior traveller segment of Chinese visitors to Russia prefers to travel with organized group. Another observation is that group travellers are more likely to recommend visiting Russia to their friends than independent travellers. The findings also revealed that a significant number of the first time travellers to Russia reported to perceive a language barrier.

The majority of the travellers stay in Moscow for one or three nights. Interestingly, the more a tourist spends time in Moscow, the more is he or she willing to visit Russia again in the near future. On average, Chinese tourists who stay at five star hotels rate their Moscow experience higher than those who stay at lower star hotels. Satisfied guests of higher category hotels are more likely to recommend a visit to Russia to their friends and family and come back again.

A significant proportion of tourists would prefer “China Friendly” accommodation and they are likely to leave a review of their trip. The main reason for them to look for “China Friendly” accommodation is something other than language or safety concerns. The most popular social network to share travel experience was WeChat, senior and young travellers alike use it.

6.3 “China Friendly” member interview

A table below (Figure 64) summarizes the questions and answers of the interview. The first column presents the interview questions in the original order. In the second column the answers of the respondent are given. These are the selected individual words and sentences taken from the interview transcript. The third column lists the key words for each question-topic. One can notice that several key words are mentioned more than once, however, at this stage it is not very important.

Question	Answer	Key words
Motivation for being a member?	- Develop the existing market - Attract individual tourists	Quality (service) Individual Tourist (Even in the) Low season
Expectations from membership?	The influx of tourists via Chinese booking systems Ctrip and Qunar	Slow, Contract (with partners from China)
Does the programme meet the expectations so far?	Many features offered in the programme do not seem to be working	Not understanding Slow Feedback (not enough)
Do you get enough information useful in your work with tourists?	A wish to receive the report from media strategy plan more often (once in the quarter) and get more reports on the promotion of the programme and its members in social networks	Information (more) Chinese Social Networks (promotion)

Please, assess the interaction between the members of the Programme?	The need for more interaction. Suggestions: Skype conferences, sharing the information about individual bookings (for hotels-members of the programme)	Sharing (Information, experience)
How could the support from the Travel Association be improved?	More help and support in working with Chinese booking systems Increase the effectiveness of work with potential Chinese partners on travel fairs	Booking systems Information Support Interaction Contacts, Business cards
How long has your company been working with the Chinese market?	14 years	
What can be done to attract more Chinese tourists to your region?	Companies should share the information about the programme's success, sales, experience of service to Chinese tourists	Support Take part in Active Reporting
Did you use the consulta tion? (If yes, please, comment about the experience)	Yes; would like to request more information about individual traveler segment	New – not new ("China Friendly" programme is new; the information on the specific of service to Chinese (provided on the consultation) is nothing new for the respondent)
Do you have any other important topics in mind to discuss?	Questions on whether it is possible to get the support with distribution of Chinese press in the respondent's region and whether the programme representatives consider the possibility to visit other regions for programme promotion	Press Region

Figure 64 Interview Question*Answer*Keywords

The next table (Figure 65) shows the results of the key word analysis in four columns. The first one contains the key words selected from the interview transcript. The chosen key words all were mentioned at least twice, and the list of key words is ranged by the frequency of use by the respondent (second column). The third column gives the short commentary about the context of use of each keyword.

The most frequently used were: individual tourist, information and understanding (not understanding). As in the case with the dichotomy "understanding – not understanding", the words were counted by the total amount of times used in speech in both positive and negative meaning. Of the total, the number of ones with negative meaning is given in brackets.

Key Word	Frequency	Context	Linked with keywords
Individual Tourist	11	Attract, growth, goal, interested in	- Booking systems - Information - Social Networks - Effectiveness
Information	8	Share, work with, more detailed	- Booking systems - Social Networks - Effectiveness
Understanding **(NOT Understanding)**	7 (3)	Contacts, needs, tendencies, work with booking systems (promotion in social networks)	- Booking systems - Social networks
Social Networks	7	Chinese, promotion in	- NOT Understanding - Information - Individual Tourist
Booking systems	6	Chinese, contract with, work with	- Effectiveness - Support

Sharing	6	Information and experience, with partner hotels, about Chinese tourists	- Information - Individual Tourist
Effectiveness **(NOT Effective)**	5 (4)	Colleagues (Work with partners, programme offers)	- Booking systems - Contacts, business cards
Contacts, business cards	4	of Chinese partners from travel fairs, does not work	- Effectiveness - Feedback
Region	4	Influences tourists and companies	- Sharing
Slow	3	Contract with a Chinese booking system	- Booking systems
Support	3	Of the programme China Friendly in China, of the members by programme coordinators	- Booking systems
Feedback	2	From potential partners in China	- Contacts, Business cards
Interaction	2	Of partners and programme coordinator	
New **(NOT new)**	2 (1)	The programme CF itself (how to provide service to Chinese guests)	

Figure 65 Keywords and links between them

In addition, the words with negative sense such as “does not work”, “is not clear”, “do not understand” were counted separately. Only the ones carrying the negative sense for the respondent were counted. For a comparison, “not new” was not included because it had a neutral meaning in the discussion.

The transcript contained 12 of negative key words, which is a 19 per cent from the total number of key word occurrences (65). From these figures it can be derived that the complaint was not the primary goal of the respondent’s taking part in the discussion. However, this information does not allow to conclude that the respondent is more satisfied than not with the programme. Before making conclusions, it could be helpful to consider a cognitive map that is presented below (Figure 66). The map shows the links between the key words, tracing the meaning of them for the respondent.

The “actors” of the “China Friendly” programme are given in orange brackets: “China Friendly” managers, Member company (the respondent), Other Member companies, Tourists from China and Chinese Partners. The relationships between them are shown in blue arrows, making the picture resemble the destination network. Two-side arrows show the two-way communication.

Other brackets – in blue color – contain the key words mentioned above. They have two functions in the scheme. One is to describe the actors, such as: “China Friendly” programme (is) **new.** The connections of this type are shown in black lines. Another function is to describe the interaction between actors, such as: “China Friendly” programme (provides) **support** (to) the Member Company. The connection of this type is in blue arrows. Note, that some key words might have both functions, in this case, **Support** is, in turn, defined as **Information** and promotion**.** The other words without brackets are given to present the context of the discussion but they are not considered as the “key words”.

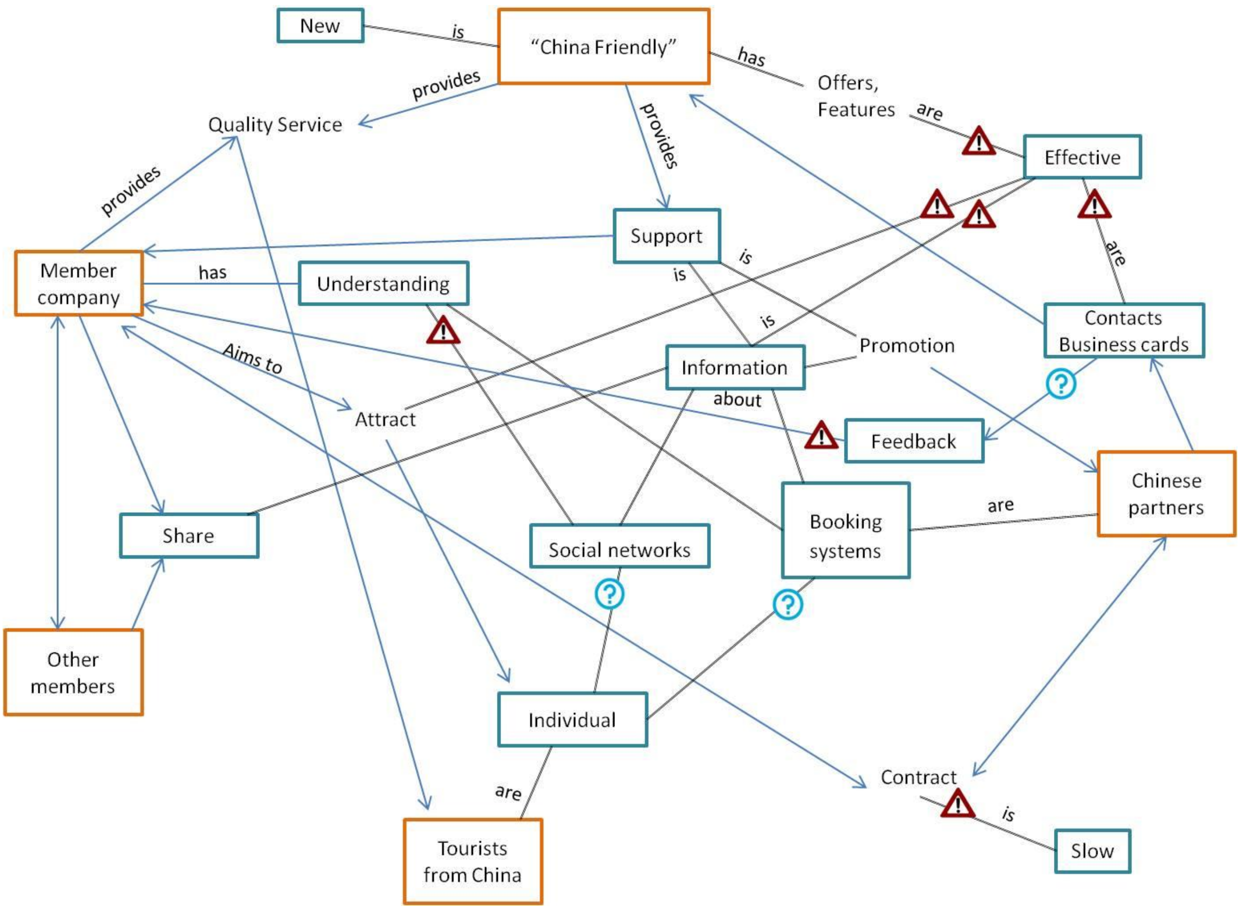

Figure 66 "China Friendly" Cognitive map

There are also red “alarm signs” in the scheme. These indicate that there was a problem in the corresponding relationship, communication issue. In most cases, these signs are synonymous to “is not”. For example, **contacts and business cards** (are) (not!) **effective**.

Another signs are the blue question marks. These point at the lack of clarity for the respondent and can be read as the “lack of information on”. For example, the respondent told that it was not clear enough what social networks and booking systems do individual Chinese tourists use. Therefore, a question mark is placed on the relation links between **individual** (tourists from China) and **social networks**.

The analysis of the scheme helped to draw conclusions about the most important themes for the respondent. This was done by, firstly, looking at the key words with most connections. This is, not surprisingly, a member company itself, since the respondent is talking mainly about their own perspective. Other results are more interesting: **Information**, **Effective** and **Booking systems** have the most connections, from which it can be concluded that the respondent ranks them as relevant and important in work. Another way to draw conclusions was to look at the alarm signs and question marks. First of all, the problems marked by alarm signs are all associated with the processes (links, relationships, communication) and not with the elements themselves. For example, the business contract negotiations with a Chinese partner, a booking system, are too slow in the respondent’s opinion. Despite that, the member is looking forward to signing this contract and is open for further discussion with other actors. The next observation is that alarm signs and questions are located next to the same key words: **Information**, **Effective** and **Booking systems**, and also **Contacts and Business cards**.

Summarizing the information from the transcript and the data analysis, the author identified four themes as the most important for the respondent. Firstly, in respondent’s opinion the **effectiveness** of working with Chinese partners should be increased. This concerns the promotion of the programme and its members via Chinese booking systems and establishment of new contacts with Chinese partners on travel fairs. Secondly, the respondent needs more detailed **information** about certain aspects of work with **individual Chinese tourists**, Chinese media in particular (mostly **social networks** but also press). What is more, currently, the **feedback** system does not meet the expectations and needs to be enhanced. This concerns the regular reporting from the programme management about the success of the programme and reaction of

Chinese partners and tourists to the promotion in social media. Finally, interaction between member companies did not cause problems but in the respondent's opinion, the collaboration should be developed further so that all members can **exchange the experience and information**.

The desire to understand the principles and mechanism of work is strong, the aspect of **understanding** is underlying for all topics above. The respondent is confident in the knowledge about their home region and argues that the region's location has its effects on the specific of work with Chinese tourists.

The member company considers collaboration between actors as natural (which can be especially clearly seen from the cognitive map) and beneficial, thus, important to develop. The respondent values, above all, active participation and prompt response from all actors, openness and has a strong focus on the results (consider the importance of effectiveness as a key word).

7 Conclusions and recommendations

The study provides answers to three research questions. The following pages describe conclusions that were made and list recommendations.

The first research question analyzed how collaborative destination marketing targeted at Chinese market has been initiated and implemented in the world. The study of competitors revealed that successful destination marketing to Chinese tourists is always integrated into a destination's existing general tourism strategy. The strategy is implemented by Destination Management Organizations in close partnership with various public and private stakeholders. Although China is recognized as a valuable market, in general, destinations market themselves to China on the same scope as to their other markets.

Collaboration plays an important role in destination marketing. Examples include: match-funding of marketing campaigns (Great Britain), encouraging smaller destinations to work under the national brand (Brand USA, Tourism Australia), training for local businesses and Chinese colleagues ("Aussie Specialists" in Australia, "USA Discovery Program" of the United States), paid media offers for local destinations and company brands and market-entry packages (United States).

International brand campaigns and targeted customer marketing campaigns are the most effective destination marketing tools that seem to have an effect on the increased number of leisure Chinese travellers to the three analyzed destinations. All three destinations have established the strong practice of market and marketing research, for example: International Visitor Research (Tourism Australia), Visa study (Great Britain), Chinese satisfaction study (Tourism Australia), The Chinese Traveller: A segmentation of the Chinese market (Tourism and Events Queensland, Australia).

Applied tourism research, training and collaboration of tourism businesses are inseparable. Research helps the destinations to formulate clear goals for the specific market, provide informative reports for the industry and develop a suitable marketing strategy. Marketing strategies of all destinations are driven by their destination analysis, customer analysis and competitor analysis. The strengths of a destination are matched with customer preferences. Two-step segmentation is done for Chinese market; all destinations have selected the most attractive market segments on Chinese market.

The challenge of destination management organizations is to market themselves to the partners and convince the industry actors to join efforts for the common goals. All destination management organizations have different ways to motivate and attract industry partners to work together. For example, Tourism Australia claims national success openly in numerous reports and papers, almost boasting about the accomplishments referring to the large national potential and actively calling the industry to join. Visit Britain is more moderate in the use of strategy statements and their way of communicating with the partners. Brand USA emphasizes the benefits to the business, using a lot of advertisement of paid offers in its market reports.

Results of the benchmarking exercise could be most effectively used by Russian destinations if combined with other additional studies such as analysis of the destination and its products, market position and destination image analysis. Combining this information, Russian destinations could establish competitive advantages and develop a destination marketing strategy.

The most important best practice from other destinations that could be recommended would be to establish destination management organization that would take the responsibility of promoting national ”Visit Russia” brand as well as regional level destination management organizations. The strategy should be built around the specific of the local tourism industry for maximum impact and emphasize collaboration as a key principle of national tourism. In addition, it would be beneficial to implement regular studies of international visitors to Russia.

The second research question was related to the profile of Chinese visitors to Russia; the goal was to find out which of them could constitute the most attractive target segment for destination marketing. The research concluded that a significant number of current leisure travellers to Moscow are first time visitors travelling in organized groups. They tend to be middle age and senior tourists whose income lies within middle brackets. Their primary motivation is entertainment. They prefer to plan their visit 3-6 months in advance. A lot of tourists have a fear of language barrier before coming to Russia.

Moreover, tourists who visit Moscow welcome service adaptation. They prefer to stay at five or four star hotels that guarantee the best quality experience. Interestingly, the more nights a guest spends in Moscow, the more he or she would like to come back to Russia. It might be concluded that “in-depth” detailed tours focusing on one or two cities will be successful and bring more return travellers to Russia.

It is most likely that the majority of Chinese tourists to Russia represent the first wave of Chinese tourists observed internationally: group tourists who find adaptation of service important. According to international forecasts, this segment will continue to hold its large share in the near future. However, a more profitable “second wave” of experienced and affluent Chinese tourists is coming and this trend is observed in competitor destinations considered in the first part of the thesis research: in Australia and in the United States. Chinese visitor profile to Moscow did not reveal a significant number of independent travelers and “big spenders”.

Combining the results of the Moscow Chinese visitor profile study with international studies of Chinese tourists it could be suggested that Moscow could focus the marketing efforts on affluent senior travellers, emphasizing the high-quality service, friendliness and respect to Chinese culture. A primary motivation of senior group travellers is to confirm their self-identity. Thus, it could be beneficial to highlight the customized experience of Moscow and develop “build your own trip” offers.

International status of Moscow as a modern capital could be promoted further to minimize the fear of language barrier and culture difference. If combined with promotion of thriving modern culture, this could help to attract another segment of experienced and high spending younger and middle age tourists.

One of the strengths of Moscow is its historical heritage. Chinese tourists – both international and Moscow visitors from the study discussed in the thesis – are attracted to the destinations with interesting history and culture. However, sightseeing is somehow less important for them than entertainment (also true for the researched sample). Therefore, other attractions could be developed and promoted in addition to make Moscow attractive and competitive: romance, luxury or adventure. Modern Chinese expect the special experience prepared for them and they are curious to discover similarities with their own culture. The proof for that would be the popularity of places reminding of common Soviet influence in Russia and the joy of finding the Chinese name for "the Beatles": Pi Tou Shi, which translates into "the gentlemen with long hair" (names campaign in Great Britain).

From the analyzed international destinations Great Britain is the closest competitor to Russian destinations in the western part of the country: cities that are rich with heritage and tradition. A positioning map built after benchmarking is presented in Figure 67. The markings in orange present the key target segments of Chinese tourists of other destinations and white markings present additional image that the destinations are trying to promote. The map shows a gap of opportunity on the down-left corner: experienced traveller who is primarily interested in history and heritage related attractions. It is possible that Moscow could focus on these tourists as the target segment for destination marketing.

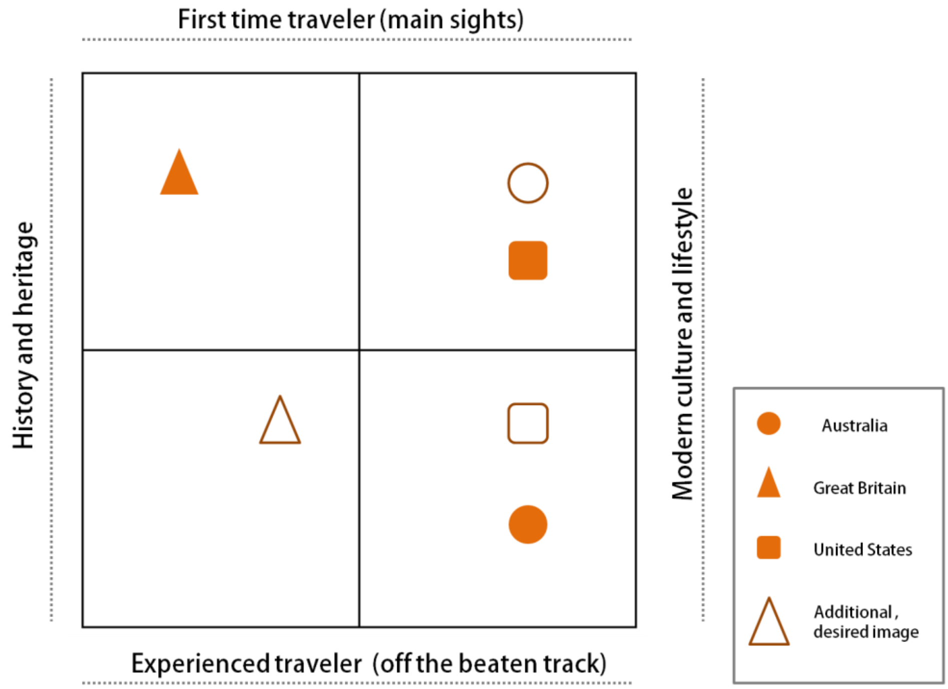

Figure 67 Destination positioning map and Chinese segments

The third research part analyzed the attitude towards collaboration in tourism of Russian tourism industry professionals working with Chinese market. One example of the collaboration of Russian tourism industry professionals is “China Friendly” voluntary service certification programme. This project is new, however it has attracted international attention. A case study looked into the opinion of the programme’s member company on whether or not the programme meets the expectations of its members.

On the example of the case study it can be concluded that collaboration with all involved stakeholders is considered very important. Most worries of the representative of the member hotel were concentrated around the effectiveness of this collaboration and their hopes were connected with better feedback.

The member company values active participation and is strongly result oriented. One of their suggestions is to increase the frequency of detailed media plan reports and reports on the programme’s performance in Chinese social networks. This demand reminds about the important task of tourism managers, not only of destination management companies but also of other companies who build cooperation in tourism such as the Travel Association “World Without Borders”. They should treat local industry representatives as customers, providing enough support to meet the demand of its members.

It could be recommended to carry out more member need assessment surveys and organize feedback and follow up discussion with all members who agreed to share their opinions and suggestions. Moreover, it would be beneficial to establish a regular meeting of “China Friendly” companies for sharing the results of their work and suggestions for the programmes’ development.

To sum up the objectives and outcomes of the work, the thesis has analyzed the view point of three different stakeholders of a destination – tourists, local companies and competitors – to learn about the potential of collaborative destination marketing of Russia as a destination for Chinese tourists. The study has considered Moscow as an example and focused on this destination; however, the case study of “China Friendly” member provided a perspective from another Russian destination located in the Far Eastern region.

To answer the research questions Chinese outbound tourism market was defined; Moscow was analyzed as a destination for Chinese tourists and the key principles of destination marketing were discussed. Benchmarking exercise helped to compare

Russia with three competitor destinations that were successful in their attempts to maximize the share of Chinese tourist visitation and expenditure. Chinese Visitor Profile Survey provided information about characteristics of Chinese visitors to Moscow. A few significant correlations influencing the behaviour of travellers were discovered. The suggestion was made to consider a further segmentation within Chinese market and several ideas for this were proposed using the information obtained from the data collected in the thesis work.

Another objective of the thesis was to find out how can a collaborative destination marketing approach be developed in Russian tourism industry to meet the goals on the Chinese market. Collaboration for tourism destinations was defined, examples from the recent tourism practice of three international destinations were analyzed and the local case study was implemented to provide an example of the existing collaboration on Chinese market in Russia. The study concluded that it is important to develop collaboration of Russian destinations and suggested principles and practical steps that could be useful for that.

Thus, the author managed to meet the objective of the thesis and the work presents a contribution to the understanding of how to market Russian destinations to Chinese tourists and how can a collaborative destination marketing approach be applied for this purpose.

8 Evaluation of the research

As the research consisted of three parts, each of them will be evaluated separately before the summary and suggestions for further research and actions.

8.1 Benchmarking

Benchmarking exercise was done in a structured way and the benchmarking procedure included steps suggested in a suitable research methodology literature. Destinations for the analysis were selected not randomly but following several predefined criteria for selection.

It could be useful to remind that the choice of destinations active and successful in their attempts to attract Chinese market segment was influenced by the amount of material available in English language. It is very likely that other destinations across the globe would provide even better best practice examples. For example, it would be interesting to analyze the marketing approaches of France, one of the favorite destinations of Chinese tourists. However, the author's knowledge of French was not sufficient to analyze materials in this language.

The work might have benefited from a better system of metrics that would help to rank the success of the competitor destinations and summarize the most important components or categories for a "recipe" of successful collaborative destination marketing. However, one might argue that it is hard to measure the quality of collaboration and rank it, and the most important consideration should be whether or not the chosen approach to collaborative marketing is effectively working for the destination in question and meets its tourism strategy goals.

Overall, the results of benchmarking shall be considered valid, reliable and relevant for the year 2016 when the work was written. It is important that the benchmarking process should be repeated in the future because, definitely, new important policies would be introduced in another five years.

8.2 Visitor Profile Survey

Initially, the author of the thesis and the partner organization had aimed to collect 400 valid questionnaires, out of which only 75 were received. Several factors could have affected the response rate negatively. First of all, the data collection period was rather short. Secondly, it took place in the end of the high tourist season while the sample calculations were based on the Augusts' numbers. According to last year observations, July and August present a high season in terms of Chinese tourist arrivals. Moreover, in the visitor survey methodology literature it was recommended to allow 60 percent for non-response when planning the amount of questionnaires (Booth 1991 p. 15). This consideration was forgotten when printing the questionnaires so exactly 400 blanks were distributed to the locations.

Finally, one factor beyond the control of the thesis author and the partner Association is insufficient funding of tourism research projects in Russia. Because of the lack of funding, the most cost-effective data collection method had to be chosen which, according to the research methodology literature, is not the most effective.

The selected data collection method – paper questionnaires – might have also influenced the number of respondents. A representative of one of the companies who was distributing the questionnaires shared her observations that Chinese tourists were more willing to participate in online surveys than fill in the paper questionnaires. Moreover, some of the online surveys show the percentage of the questionnaire left to fill in before the respondent submits his or her answer. In paper version many respondents filled in only one side of the questionnaire.

Low sample size puts limitations on the generalization of the results and not so many statistically significant correlations were found in the data. Chapter 6.2 includes a commentary on what parts of the analysis can be generalized and what cannot.

The questions were created in order to meet the needs of the thesis partner. In the process of data analysis several ideas appeared about how the questionnaire could be improved. Firstly, a question about respondent's general travel experience could be added. Secondly, a question about income level left an opportunity for ambiguity and it should have been stated whether household or personal income was asked about.

Suggestions for a further research would be to complement the results of the survey with qualitative methods such as focus groups to find out more detailed information about the motives behind the answers. NPS Index calculation could be followed with an open-ended question, asking the visitors why they would recommend or not recommend a destination. This could identify the needed actions to improve the Index score. However, Chinese speaking analysts should be involved to organize focus group study and translate open ended questions which will result in additional costs for the survey.

Overall, the results are limited for generalization but present useful considerations for further research.

8.3 "China Friendly" member interview

A single case study cannot be generalized to all member companies; however, it meets the aims of the thesis by giving a perspective of one of the members. The results of the member need assessment survey can be analyzed and discussed on a case basis. Individual approach and feedback will need to be developed for each respondent.

Analysis followed the respondent's own words strictly and can be named reliable and objective. This research does not allow for generalization but presents a reliable and detailed case study.

Naturally, more case studies would help to identify common problems and find out more about the collaboration of "China Friendly" companies. Therefore, it might be useful to repeat the study in a course of time. It is possible that when more time passes since the start of the programme more companies will be ready to formulate their suggestions.

One additional month had to be added to the planned research schedule because of the extra time needed for data collection and analysis.

Most of the research could not have been done without the support of and cooperation with the Travel Association “World Without Borders”. The author of the work is thankful for the opportunity to help the Association and contribute to research connected to their project “China Friendly”. Cooperation with the Association was the fascinating opportunity to learn about the operations of the large company of the tourism domain and the challenge of collaboration of mutual interest groups for the research project.

The survey of Chinese visitor profile was an important project on which many people collaborated. It could be suggested that further applied research in tourism will be implemented in Russia and collaboration in tourism will be encouraged and supported by the tourism organizations in charge for the national tourism development.

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Appendices

Appendix 1. Questionnaire in English language

Hello, dear friend from China,

We are glad to see you in Russia and we hope that you enjoyed your stay with us. Travel Association “World Without Borders” that implements “China Friendly” project in Russia and National Tourism Office “Visit Russia” are conducting a survey among Chinese travelers to ask about their Moscow trip experience. Your answers will help us to improve the tourism service and make visits to Moscow even more interesting and good quality.

We have tried to do this questionnaire as short as possible. It will take you no longer than 10 minutes to fill it in.

We would be thankful if you could leave this form at the reception desk of your hotel.

Thank you!

1/3 Your personal details

1.	From which city do you come from	Open-ended question
2.	Your age	○ Less than 14 years old ○ 15-24 years old ○ 25-34 years old ○ 35-50 years old ○ 51-60 years old ○ More than 61 years old
3.	Your sex	○ male ○ female
4.	Your education	○ PhD ○ Higher education ○ Further professional education ○ Secondary education ○ Basic education
5.	Your occupation	○ Trade sector ○ Industry ○ Education and science ○ Finances ○ Public service ○ Tourism ○ Other
6.	Your monthly income	○ <1000 RMB ○ 1000-3000 RMB ○ 3000-5000 RMB

		○ 5000-8000 RMB ○ 8000-12000 RMB ○ >12000 RMB
7.	Who do you travel with?	○ Husband/wife ○ Beloved one ○ Children under age of 14 ○ Other family members ○ Friend/Friends ○ Colleagues ○ I came on my own
8.	Is it your first trip to Russia?	○ Yes ○ No
9.	What is the main purpose of your visit?	○ Entertainment ○ Sightseeing ○ Visiting friends and family ○ Business matters ○ Education matters ○ Health and well-being
10	Do you travel with an organized group?	○ Yes ○ No

2/3 Planning your trip to Russia

11.	What inspired you to travel to Russia?	○ A bargain deal from travel agency ○ Good reviews on the Internet ○ Friends or relatives' recommendations ○ Newspaper or magazine article ○ Information of a travel agency ○ A movie or TV episode about Russia ○ Interest to history and culture of the country ○ A simple desire to go somewhere ○ Other
12.	How long in advance did you begin to plan your trip to Russia?	○ More than a year in advance ○ Half-year – year in advance ○ 3-6 months in advance ○ 1-2 months in advance ○ A few weeks in advance ○ Spontaneous decision (Last Minute)
13.	What helped you to plan your visit to Russia?	○ Stories of family, friends, colleagues ○ Web search ○ Social networks ○ Website of a travel company ○ Travel review sites ○ Online magazines and travel blogs ○ Personal visit to a travel agency ○ Newspapers and magazines ○ Visit to a fair ○ Other

14.	Did you have any concerns before travelling to Russia?	○ Language barrier ○ Personal and property safety ○ Cultural difference ○ Service quality ○ Incomprehensible signs/signage ○ Medical help
15.	Did you use any websites to plan your trip to Russia?	○ Ctrip ○ Booking.com ○ Qunar ○ Ali Trip ○ China Travel Service ○ CYTS ○ Tuniu ○ Russia-Online.cn ○ Other (fill in space) ○ I did not use any websites

3/3 Russian trip experience: your impressions

16.	In what category of accommodation did you stay in Russia?	○ 5 * hotel ○ 4* hotel ○ 3* hotel ○ 1-2* hotel ○ Hostel ○ Other (Fill-in space)
17.	How many nights did you stay in Moscow during your trip?	○ 1 ○ 2 ○ 3 ○ 4 and more
18.	What services are the most important for you in your accommodation? (Please select at least 3)	○ Website in Chinese ○ Adapted meals (Chinese breakfast) ○ Chinese TV Channles ○ Chinese press (newspapers, magazines) ○ Tea set in the room ○ Slippers ○ WiFi access ○ UnionPay acceptance ○ Chinese-speaking personnel ○ Guides/signage/restaurant menu in Chinese ○ Rooms for smokers ○ Other (space to fill in)____________________
19.	If otherwise equal conditions, will you choose a “China Friendly” hotel, a part of a programme of adapting services for guests from China?	○ Yes, absolutely ○ Yes, probably ○ No ○ Indifferent ○ Other (Fill-in space) ○ Hard to say

20.	What purchases do you plan to (already made) during your stay in Moscow?	○ Traditional souvenirs ○ Food, local specialities ○ Clothes, Shoes ○ Cosmetics, household chemicals ○ Décor, jewelry items ○ Amber, precious stones ○ Paintings, art objects ○ Other ○ No intention to do shopping
21.	Would you leave a review of your trip?	○ Yes, at travel company web pages ○ Yes, in social networks, ○ Yes, in a special review web sites (Tripadvisor, Tuniu and others) ○ Other (fill in space) ○ Nothing from above
22.	On which social networking sites will you share your travel experiences with friends?	○ Weibo (names of these are given in Chinese) ○ WeChat ○ QQ ○ Youku ○ Mafengwo ○ Meipai ○ Blog Sina ○ Russia-Online.cn ○ Other (fill-in space) ○ Nothing from above
23.	Please give your trip to Moscow a rate (from 1-10) 10 - Very satisfied 1 - Very dissatisfied	(1 to 10 scale)
24.	Would you recommend trip to Russia to your friends and family? (from 1-10) 10 - Very likely 1 - certainly not	(1 to 10 scale)
25.	Will you come back in Russia in five (From 1-10) 1 - Very likely 1 - certainly not	(1 to 10 scale)

Appendix 2. Sample questionnaire in Chinese language

中国的朋友，你们好！

我们非常高兴能在俄罗斯遇到您，也希望您能喜欢俄罗斯。“世界无国界”旅游协会目前正在俄罗斯实施“友好中国”的项目，因此参观俄罗斯（VisitRussia）办公室决定对赴俄旅游的游客进行调查问卷以便了解大家莫斯科之行的感受。您的回答将有助于我们更好的改善旅游服务质量，让莫斯科变得更加有吸引力。

我们尽可能让问卷内容十分简短。填写调查问卷只需不到10分钟的时间。若您能将填好的调查问卷放到酒店前台，我们将不胜感激。

谢谢！

1/3 您的个人信息

1. 您来自于哪个城市？

SHANGHAI

2. 年龄
- 不到14岁
- 15–24 岁
- 25–34 岁
- 35–50 岁
- 51–60 岁
- 超过 61 岁

3. 性别
- 男性
- 女性

4. 教育水平
- 博士
- 高等教育
- 中等专业教育
- 中等水平教育
- 初等教育

5. 职业
- 商贸行业
- 生产行业
- 教育行业
- 金融行业
- 国家机关
- 旅游行业
- 其他

6. 月收入
- <1000 元
- 1000–3000元
- 3000–5000 元
- 5000–8000 元
- 8000–12000 元
- >12000 元

7. 您的出行伙伴
- 丈夫/妻子
- 恋人
- 14岁以下的儿童
- 其他亲属
- 朋友/朋友们
- 同事
- 自己

8. 这是您第一次来俄罗斯吗？
- 是
- 否

9. 您来这里的主要目的是？
- 娱乐和度假
- 参观名胜古迹
- 探望朋友和亲人
- 商务
- 教育
- 疗养

10. 您是跟团出游吗？
- 是
- 否

2/3 赴俄旅游的计划

11. 是什么因素促使您前往俄罗斯？
- 旅行社特价
- 网上的良好评价
- 亲朋的建议
- 报纸或者杂志上的文章
- 旅游部门的信息
- 有关俄罗斯的电影或者节目
- 对俄罗斯历史文化的兴趣
- 单纯想去某个地方的愿望
- 其他

12. 您提前多长时间计划访俄？
- 1年多以前
- 半年 - 1年
- 3–6个月
- 1–2个月
- 几周
- 临时起意 (LastMinute)

13. 是什么因素帮助您规划了俄罗斯之旅？
- 亲朋好友们的故事
- 网上搜索
- 社交网站
- 旅游公司网站
- 旅客评论网站
- 旅游在线杂志及博文
- 亲自向旅游机构咨询
- 报纸和杂志
- 参观展会
- 其他

14. 您在赴俄旅游之前有什么担心吗？
- 语言障碍
- 个人旅途安全
- 文化差异
- 服务质量
- 不理解标志牌
- 医疗帮助

15. 您在赴俄旅游时是否使用在线预订网站？
- Ctrip（携程网）
- Booking.com
- Qunar（去哪网）
- AliTrip
- ChinaTravelService
- CYTS
- Tuniu（途牛网）
- Russia-Online.cn
- 其他 ____________
- 不使用在线预订

3/3 您在莫斯科入住的酒店星级？

16. 您在莫斯科入住的酒店星级？
- 5*酒店
- 4*酒店
- 3*酒店
- 1–2*酒店
- 青年旅店
- 其他 ________________

17. 您本次旅程中在莫斯科住几晚？
- 1
- 2
- 3
- 4晚以上

18. 入住宾馆时哪些服务对您来说尤为重要？（请指出至少3点）
- 酒店的中文网站
- 中国式的早餐
- 拥有汉语电视频道
- 中文报纸、杂志
- 房间里有茶具
- 拖鞋
- 有Wi-Fi
- 可以使用银联支付
- 说汉语的员工
- 中文导游图、指示标、菜单
- 吸烟室
- 其他

19. 在其他同等条件下您是否会选择“友好中国”项目下专门针对中国游客提供服务的酒店？
- 是的，肯定会
- 可能会
- 不会
- 无所谓
- 其他 ________________
- 很难回答

20. 在莫斯科旅游期间您计划购买哪些产品？
- 传统纪念品
- 地方特产
- 衣服和鞋
- 化妆品、日用化工
- 首饰、饰品
- 琥珀、宝石
- 风景、艺术品
- 其他
- 暂无购物打算

21. 您是否会为旅游写点评？
- 是,会写在旅行社的网站上
- 是,会写在社交网站上
- 是,在专门的评论网站 (Tripadvisor, Tuniu及其他)
- 其他 ________________
- 以上均无

22. 您会在哪些社交平台上与朋友们分享旅游经历？
- 微博
- 微信
- QQ
- 优酷视频
- 蚂蜂窝
- 美拍
- 新浪微博
- Russia-Online.cn
- 其他 ________________
- 以上均无

23. 请给您的莫斯科之行打个分（从1-10分）
10分非常满意
1分非常不满意
1 2 3 4 5 6 7 8 9 10

24. 您是否会向您的亲朋好友推荐俄罗斯之行？（从1-10分）
10分非常可能会
1分肯定不会
1 2 3 4 5 6 7 8 9 10

25. 您在5年内还会再来俄罗斯吗？（从1-10分）
10分非常可能会
1分肯定不会
1 2 3 4 5 6 7 8 9 10

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