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THE "DESTINATION IMAGE" FROM THE POINT OF VIEW OF THE CHINESE TOURIST

A solution to the problem of communication of the tourism product

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论文提要

这篇论文从中国游客的角度，主要论述了 “Destination Personality 和 “Destination Image”。第一个被定义为“与目的地相关的一组人的特征”，而第二个则被定义为“一个人对目的地的信仰，想法和印象的总和”（Crompton，1979）[1]。我选择这个题目的主要原因是因为我在位于都柏林的 B-sm @ rk 股份有限公司进行了实习，并在哪里在旅游营销和管理领域进行了研究。在我的实习期间，我负责了一些项目。其中一个项目由 SAVE 集团股份有限公司- 威尼斯（VCE）和特雷维索（TSF）机场委托进行。我将在论文中把作为案例研究讨论。我用它来支持我论文的要点，也就是说：（一）中国游客的目的地感知与西方游客的感受如何不同；（二）中国游客的习惯和需求是什么；（三）为了吸引和留住中国游客，旅游行业可以执行哪些活动和项目。

现在，从中国游客角度来看，旅游目的地的主题变得越来越重要。这是因为最近几年中国出境旅游业的发展极为 迅速。实际上，中国已经成为了全球第一大出境旅游市场，且在 2016 年前往欧洲的中国游客人数已经多达 1020 万 (ETC, 2017)[2]。而且，这个数字预计会增长。根据文献和近期的研究，现在诞生了一种新的旅游业。 它主要由年轻游客组成，它将改变我们了解的中国人旅游的方式。如今，越来越多的中国人开始将欧洲和意大利作为他们去度假的目的地，所以对意大利旅游组织来说这是一个非常好的机会。可是大多数意大利的旅游业经营者仍然不太了解中国游客和中国旅游市场的习惯，他们无法有效地推广意大利的旅游景点。显而易见，旅游组织必须确定正确的沟通对象并制定正确的政策来实现目标。我认为确定一种开发目的地身份并将一个目的地的形象置于顾客心中的方式非常重要。中国的出境旅游仍然是一个新的现象，中国人对欧洲旅游目的地知之甚少。

我的论文的目的是分析研究中发现的数据，为与中国游客打交道的机构和公司制定一些指导方针。为了给中国游客提供更好的服务，旅游组织应该更好地了解中国游客的习性和需求。最近，两个推动中国出境旅游的重要项目被发布了。 其中之一是“中国欢迎”认证（Welcome Chinese Certification）， 另一个是 “欧盟中国旅游年”（2018 Eu-China Tourism Year）。 “中国欢迎”认证由中国旅游学院（CTA）发布，并与中国国家旅游局（CNTA），中国中央电视台（ CCTV）和中国银联（UnionPay）合作。这项认证非常重要，

[1] http://journals.sagepub.com/doi/10.1177/004728757901700404
[2] http://www.etc-corporate.org/?page=report&report_id=103

因为它专注于中国游客的接待。它让认证持有者通过中国旅游运营商和机构的关系网进入中国市场。关于 “欧盟中国旅游年”，它的目的是改善不太知名的目的地，改善旅游体验，提供和增加经济合作的机会，为签证创造便利并使两地间的飞行变得更方便。（EU-China tourism Year 2018）[3]。

我的论文分为五章。在第一章中我将介绍一些关于旅游研究的基本知识。本论文对“目的地管理” 和 “目的地营销” 进行了广泛的研究，以了解游客的需求和特征以及了解不同类型的旅游。旅游业可以使旅游组织和游客互惠互利。实际上，游客可以欣赏美丽的风景和目的地文化，丰富其经验，扩大其眼界，增加其知识。另一方面，旅游组织和当地经济将会获得经济利益，并提升它们的形象价值。我们可以清楚地看到为什么营销对于消费者的选择的影响非常重要。另一个重要问题是游客满意度。其实，它刺激了重复访问，积极推荐，获取新游客，声誉提升和更高的盈利能力。而且，他们要求越来越高。旅游者的看法也可能受到两个因素影响，即原产国效应和国家品牌认知。原产国效应的概念来源于吉爾特·霍夫斯塔德 （Geert Hofstede）关于文化的研究。他是一位著名的荷兰人类学家和心理学家。文化影响着人们的生活方式和行为，因此影响了人们看待旅游目的地和目的地品牌形象的方式。因之，研究人们的文化并创造特定的交流非常重要。国家品牌评估了国家品牌的实力并评估了它在游客选择中的驱动力。对一个国家的良好印象可能会促使：访问该国的决定，向亲友推荐或与其做生意。

在第二章中，我专门分析了中国旅游市场。首先，我介绍了近几年的中国旅游史。中国现代旅游是七十年代末改革开放的以后开始的。近几年来休闲旅游已经成为了一个急速上升的趋势。现今欧洲国家主要吸引了富有的中国人和中产阶级的中国人，可是这只是一小部分的中国人口。中国人越来越富有，未来的几年里来欧洲的中国游客数量会不断的增加。这也是由于中国政府有意通过各种项目在中国传播财富。 例如 “共同富裕” 项目和 “一带一路” 计划。第一个项目的目的是推动公路，铁路，管道以及其他基础设施的建设。第二个项目旨在促进与中亚和东南亚的经济联系，从而刺激与这些沿线地区的经济（Kloof, 2018）[4]。我们可以说，目前的是中国出境旅游一个非常重要的时期。实际上，中国现代旅游与传统旅游不同。过去，团体旅游的游客几乎是远行的唯一方法。现在诞生了一种新的游

[3] https://ecty2018.org/
[4] http://www.ftchinese.com/story/001072603?archive

客，也就是说：新一代旅游者，这种类型的游客被视为自助旅游者（FIT，Free Indipendent Travelers）。这种旅游方式与传统旅游是完全不同的。它主要由年轻人组成，即所谓的千禧一代（millennial），也就是说，那些出生于20世纪80年代和90年代的人。自助旅游者的收入较高，并且他们也有能力自己安排他们的境外游。他们更愿意跟小团去旅游或者自己去旅游。近几年来自助旅游者的数量逐渐增加。他们通过互联网在网上寻找信息，预定宾馆，买飞机票等等。然而，购物不再是中国游客出国时的首要任务。最后，我将介绍中国互联网的背景， 且我将重点关注社交媒体、在线旅行社(online travel agencies)和中文搜索引擎， 因为它们在网络营销中发挥着重要作用。我分析了在中国最重要的社交媒体，特别是微信、微博、QQ和人人网。然后我分析了在中国最重要的中文搜索引擎，比如，优酷和百度。另外，我重点关注了中国最著名在线旅行社，比如说携程 (Ctrip)，去哪(Qunar)，艺龙（E-Long），飞猪(Alitrip)等。

在第三章中，我着重地介绍了来意大利和意大利的威尼托大区的中国游客的特点。罗马，米兰，威尼斯和佛罗伦萨是我国访问量最大的文化目的地。一方面中国游客越来越喜欢来意大利度假。到意大利旅游的中国游客大多喜欢其艺术和文化遗产（世界文化遗产的地区）、意大利生活方式、美食和葡萄酒、意大利制造、浪漫的风景等等。另一方面意大利公共和私人旅游组织仍然在吸引中国游客中遇到了很多困难，比如说这主要是因为文化和语言的障碍，它们缺乏的知识和支离破碎的旅游提议。威尼托大区主席卢卡·扎亚(Luca Zaia)表示，中国旅游业每年以11-12％的速度增长，所以威尼托应该采取措施提高旅游收入。

在第四章中，我将解释报告的分析。 该研究是从中国游客的角度对威尼斯-泰塞拉-马可·波罗机场和威尼斯城的目的地人格进行调查。数据分析将帮助威尼斯马可波罗机场了解新的中国旅游业。由于中国游客人数不断增加，机场希望增加连接威尼斯与中国的航班数量。问题是现在它没有直航，所以中国游客必须使用不同的机场才能抵达威尼斯。SAVE已经开始着手实施一些变化，为的是让中国游客更开心。本次调查第一个部分考察了中国游客的旅行行为，然后第二个部分考察中国游客对于建立威尼斯与中国之间直飞航班的可能性的看法，另外第三个部分谈论关于中国人对机场服务的评价。第四个部分集中讨论中国游客对威尼斯城市的看法，然后第五个部分试着了解哪些因素需要改进。最后，第六个部分考察了中国游客的特点，以了解新类型的游客。另一方面，我调查收集了中国游客对欧洲和意大利旅游目

的地形象的信息，从中国人前往欧洲的动机，到他们在这些目的地的最喜欢的经历以及他们对旅行经历的反馈。

最后，在第五章中我分析了为吸引中国游客的有效营销策略的主要因素。外国旅游经营者和意大利旅游经营者还是遇到很大的困难。因为旅游组织必须面对不同的障碍：文化和语言差异、不同的需求和须要、中国旅游市场的快速变化、有限的连接旅游目的地和中国的航班数量。所有这些因素将继续阻碍中国出境旅游的传播。如果旅游组织希望能够管理中国旅游，就必须让其旅游服务适应新的市场，必须监测该中国旅游市场的行动，必须进行有针对性的推广。 此外，他们必须与整个国家的旅游系统、来自其他行业的公司（如电信或运输），和中国合作伙伴相互合作。此外，旅游组织应投资于人员的具体培训，应该创建高质量和个性化的服务。事实上，中国游客真的很关心酒店和服务的质量。另一个很重要的论点是旅游组织应避免对中国游客形成刻板印象。中国游客来自一个巨大领土的不同地区，其中人们的习惯很不一样。而且，他们正在变成越来越复杂，并且他们的需求也不断变化。越来越多的中国人在他们的日常生活中使用社交媒体与家人朋友保持联系，也从中找到一些信息。近几年来越来越多中国游客通过互联网和社交媒体预定酒店，飞机票，旅游景点门票等。所以在中国旅游市场网络营销是不可缺少的一部分。与主要意见领袖（Key Opinion Leaders）联系也很有用，因为他们是《影响者》（influencers），他们在全中国拥有数百万的粉丝。可是中国的社会媒体的格局与西方社会媒体的格局不同。此外，考虑到《防火长城》（Great Firewall of China）的问题是很重要的，因为它阻止了许多西方网站被中国互联网用户看到和阅读。通过网络进行营销可以分为三个阶段：（一）旅游组织必须提供旅游前期服务：用户可以在线组织他们的旅行。（二）旅游跟进服务 (follow-up services)：中国游客在不熟悉的情况和地方不喜欢感到孤独和无助。（三）旅游后期的服务，或者售后服务：这里可以加强消费者的忠诚度，并创造良好的口碑(Milillo, 2016/2017)。

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ABSTRACT

The idea of this thesis was born in occasion of an internship and research period in the field of tourism marketing and management conducted at *B-sm@rk Ltd.,* located in Dublin. During my training, I took care of some projects, which are still ongoing, about the "Destination Image" defined as « the sum of beliefs, ideas and impressions that a person has of a destination » (Crompton, 1979) [5] and "Destination Personality" defined as «the set of human characteristics associated with a destination». One of these projects, that I will discuss as a case study in my dissertation, has been commissioned by *SAVE Group S.p.A. - Venice (VCE) and Treviso (TSF) Airport,* a firm that primarily works in the area of Veneto, and therefore willing to focus its attention both on Venice and on the development of tourism of inner areas too.

Even if there are tonnes of publications regarding the tourism industry, in my opinion literature still poorly deals with the theme of the perception of the destination from the point of view of the Chinese tourist. This issue is indeed gaining importance nowadays, due to the high percentage of Chinese tourists all over the world. A percentage that is meant to grow in the next years. As a matter of fact, according to the European Travel Commission (ETC, 2017)[6] , China is the world´s leading outbound travel market. In 2016, there were 10.2 million Chinese visitors to Europe and the number is expected to grow. Moreover, 2018 will be the *EU – China Tourism Year* (an event launched precisely in Venice) and, as a result, we are witnessing a ferment in the world that revolves around tourism. In my dissertation, I wanted to deepen the knowledge of the theme of "Destination Personality" from the point of view of Chinese tourists. The goal of the "Destination Personality" is to create a personality of the destination that has to be unique and has to mirror the perception that the tourist has of himself. Aaker (1997)[7] developed the Brand Personality Scale (BPS), which consists of five generic dimensions - excitement, sincerity, competence, sophistication, and ruggedness - in order to assess consumers' consumption and its effects on behaviour. As a result, this index can be analysed to understand the state of mind of the tourist and to adjust the right marketing actions to attract more tourists and create a sophisticated "Destination Image". As we know, it is important to be aware of the interests and needs of consumers to be prepared and anticipate their requests and desires, and to influence them in order to attract them toward one's own product (which in this case is a destination) and to keep the pace in a competition that is becoming fiercer.

[5] http://journals.sagepub.com/doi/10.1177/004728757901700404
[6] http://www.etc-corporate.org/?page=report&report_id=103
[7] https://www.haas.berkeley.edu/groups/finance/Papers/Dimensions%20of%20BP%20JMR%201997.pdf

As observed so forth, there is a problem of communication with the Chinese tourists. We are used to deal with European tourists; however, as it can be seen in Venice, for example, the percentage of Chinese tourists is growing, and the touristic organizations are not able to cope with them in the most efficient way. The touristic organizations and firms would like to exploit the trend of the Chinese tourists, but still they do not have the appropriate knowledge and competences to face this new challenge. It is therefore necessary to define the right communication objectives and policies to hit the target. The aim of my dissertation is to analyse the surveys and the data found in my research to produce some principle guidelines for the institutions and companies that deal with Chinese tourists. My final purpose is to give some suggestions regarding marketing actions that the institutions should adopt to attract tourists, according to their needs and wants. Related to this point, I think that it is important to determine a way to develop a destination identity and position it in the mind of the customer. It is essential to solve the communication problems that the institutions now have with the Chinese tourist and create an ad hoc tourism product for the local destination. Actually, it is important for the touristic marketing to differentiate the destinations, promoting the unique characteristics that are able to enhance the value of the different destinations, catering to the different needs of Chinese tourists, and engaging them at every stage of their trip.

In the first chapter, I deepen the topic of tourism basic conceptual framework and literature. In the second chapter, I introduce the peculiarities of the Chinese outbound tourists, which will be analysed specifically in the Italian and Venetian situation. Subsequently, in the fourth chapter I describe the case study and the survey, including all the steps undergone to retrieve all the data needed by the customer (*SAVE Group S.p.A. - Venice (VCE) and Treviso (TSF) Airport*). The fifth and last chapter consist of the development of the possible marketing strategy directed to the tourism organizations and based on the data obtained through the survey and the antecedent researches.

INTRODUCTION

Problem statement

The touristic organizations would like to exploit the trend of the Chinese outbound tourism but they still do not have the appropriate knowledge and competences to face this new challenge. Hence, I believe it is necessary to define the right communication objectives and policies to hit the target. Moreover, a major problem met by these public and private subjects is represented by the fragmentation that might bring the communication actions to overlap and create ineffectiveness. This fragmentation is caused by an excessive articulation of the decisional levels that causes administrative and functional problems. They clearly need more coordination among themselves and among other territorial entities to exploit the synergies arising from integrated approaches for the promotion of the destination. The decision makers will face the challenge to balance all the interests of the various stakeholders inside the destination and identify strategic management actions for the development of the destination; they need to be able to attract both tourists, human and financial capital. An example of this is the implementation of interaction processes among tourism, commerce and local attractions.

Research question and aim

The proposed underlying research questions to be treated within the scope of this Master thesis are: (a) how the destination perception of Chinese tourists is different from the western one, (b) which the behaviours and needs of Chinese tourists are, (c) which activities and projects the tourism industries can perform, in order to attract and retain the Chinese tourists. Taking these research questions as a lead, the aim of this thesis can be: Understand better the Chinese tourist behaviour and needs in order to give him greater services and Implement marketing actions that will help the tourism organizations to cope with this new wave of Chinese tourists.

In addition to the knowledge taken from literature, I use a case study methodology to provide interesting insight for both academics and professionals (as for example destination management and marketing offices and firms operating in the tourism sector) into the process of marketing and branding a destination in more effective and efficient ways.

Literature review

First, I start by examining and investigating the basic knowledge, taken from the existing literature to create a theoretical framework and later deepen my knowledge about the unique Chinese tourist characteristics. On the one hand, I provide and analyse all the literature regarding tourism:

"Destination Management", "Destination Marketing" and "Destination Branding", getting a deeper knowledge of the topics of "Destination Image" and "Destination Personality", the psychology of tourists as consumers and the important theme of consumer and tourist satisfaction.

I then consider the issue of the country and culture related influences, which are important topics in the field of tourism too. The Chinese culture is considered to be quite different from the so-called "western culture" therefore it is important to be analysed in the most neutral way as possible. Related to the issue of the culture influences, I introduce the theme of Country Brand and Country Brand Indexes, which are believed to be useful instruments for the assessment and measurement of the perception of a certain country by foreigners. On the other hand, I extrapolate from the existing literature information about the main features related to the Chinese outbound tourism such as economic and demographic trends, the various segments of tourists and their peculiarities together with the growing importance of the internet factor in the Chinese society.

Case study and relative research method

To continue, I propose as case study the marketing analysis made for *SAVE Group S.p.A. - Venice (VCE) and Treviso (TSF) Airport*, started during my internship at *B-sm@rk S.r.l.* When I first started this project, I had few knowledge of Chinese tourism in Italy; therefore, I carried out a period of research investigating data and literature that I retrieved by internet sources, books and webinars. The second step consisted in the creation of a survey based in equal parts on the data and information collected, the requests of the clients and the previous experience and theory figured out by *B-sm@rk S.r.l.* related to the indexes of "Brand Personality" and "Destination Personality" and its expertise on emotion perception.

The survey was meant to be spread on a twofold basis. That is to say, on-line via *Witmart*, a platform where you can get in contact with freelancers from all over the world, performing a wide range of jobs, from web design to event planning, from translation to the execution of surveys and crowdsourcing. Firstly, a few other platforms were tested and later discarded because not efficient, than a test batch has been released on *Witmart* to test the reliability of the users. The replies of these users have been carefully checked to be certain that their responses were not falsified and that they were in line with other replies obtained from face-to-face interviews. The second method used was a face-to-face assisted interview. The interviewer approached the Chinese tourist in public places of Venice, as for example, San Marco Square, Santa Lucia train station, Accademia, Rialto Bridge and so on. By using a tablet, the interviewer handed out the surveys explaining the project to the Chinese tourist. As a reward, the tourist received coupons and discounts given by various firms and institutions who collaborated with of *B-sm@rk S.r.l.* The last step was the analysis of the data obtained by the

survey, performed with the help of the experts working in *B-sm@rk S.r.l.*, promptly collected in a report. It was delivered to *SAVE Group S.p.A.* and presented to the "2018 Eu-China Tourism Year (ECTY)" hosted in Venice during the month of January. To conclude, using the report as a starting point, I try to suggest some marketing actions useful for the tourism organizations involved in the project and for other firms who will be interested in experiencing new ways to attract and retain their customers.

Limitations

One of the main limitations of the case studies is normally the fact that even though they can only describe insights gained from one specific studied case, there is temptation for generalising these results and present some broad principles, which allow the underlying case study findings to have extensive denotations. The case study is based on data, retrieved from a survey done on purpose for the *SAVE Group S.p.A. - Venice (VCE) and Treviso (TSF) Airport,* and, as such, it focuses on flights and travel. The report can be used for other purposes too, but with the due awareness of that. One other possible limitation is the fact that all the marketing actions I am going to suggest are developed using my personal point of view and those of the people who collaborated actively with this project. Of course, another issue we encountered during the execution of the survey and the dissertation, is the fact that we had little knowledge of the Chinese tourism world, therefore we had little familiarity with the way Chinese people approach to the many fields that gravitate toward tourism, as, for example, social media and platforms, needs and preferences of Chinese people and the way to approach with them during an interview. To conclude, I think that the time and the resources available were quite scarce and we had to cope with these problems in the best way possible. If we had had more time and human resources to perform the spreading phase, this would have meant the possibility to cover a wider range of tourists. However, these issues will open the way to a new possible survey with the aim to deepen the theme of the Chinese tourism in Europe and in Italy, and why not, with a specific attention to the main touristic Italian regions such as Veneto or Tuscany. This possibility is supported by the interest in Chinese tourism that the "2018 Eu-China Tourism Year (ECTY)" has created in the sector.

1. CONCEPTUAL FRAMEWORK

I will start this dissertation with some basic knowledge, taken from the existing literature to create a theoretical framework, therefore to better understand the whole paper. First, I will start defining what a "Tourist" is; namely, someone who leaves his or her residence for a certain destination by means of transport for various purposes, for example, to enjoy the beautiful landscapes or the different culture of the destination that the tourist is visiting (Wang, Pizam, 2011). The spatial movement from his or her residence to the destination plays an important role in realising his or her travel desires. On the one hand, while travelling, the tourist will bring benefit to the destination by consuming the tourism product, improving the environment wealth and enhance the image of the destination. On the other hand, tourism can enrich tourist's experience, widen their horizons and increase their knowledge (Wang, Pizam, 2011). The tourist can be classified in different types according to the activity and the motivation engaged in. Above all tourism can be divided in "mass tourism" or "alternative tourism" (Theng, 2015). The first term designates the organized movement of large groups of people toward touristic locations. The second term refers to individually planned activities to gain experience and first-hand knowledge about local cultures and environments. It is performed by more mature tourists that prefer to live the real experience, much more in contact with local inhabitant and nature rather than the triviality and lack of depth of the mainstream-tourists. Furthermore, tourism can be divided in many more categories such as; pleasure tourism, business tourism, nature tourism, cultural tourism, social tourism, leisure tourism, sports tourism, religious tourism, health tourism, adventure tourism, ecotourism and so on (Triarchi; Karamanis, 2017)[8].

When talking about the touristic destinations it is important first to define two basic terms such as the "Destination" itself and the "Destination Product", described later in this chapter. In the tourism sector, the subject entities are the "Destinations", defined as « geographical spaces in which the guest can have the availability of all the range of services that he thinks are necessary for his stay» (Pechlaner, Weiermair, 2000). A place can be qualified as a "Tourist Destination" when it is able to attract significant and constant touristic fluxes and can pursue the attraction, accessibility and reception of the tourists (Pencarelli, Forlani, 2002). In other words, a destination can be called as such when the tourism market acknowledges the presence of natural or artificial attractive factors able to bring the desire for a holiday into that place, and when a consistent number of travellers choose it from a set of alternatives thanks to its unique characteristics (Martini, 2008).

[8] http://www.scienpress.com/Upload/BEJ/Vol%206_1_4.pdf

The "Tourism Product" has different characteristics and shapes when compared with the types of products of other goods and services. It can be defined as «the sum of physical and psychological satisfaction it provides to consumers during their travelling route to the destination» (S.L.J. Smith 1994). It « establishes a set of attraction factors in which the consumers translates his own demand, according to his motivations, to his culture and his value system, to his knowledge and information, to his personality and socio-economic conditions » (Rispoli, Tamma 1995). The tourism product is very complex because every element inside the destination can acquire some interest in the eyes of the tourist. Moreover, the same destination can be chosen for different reasons and in different situations by the tourists. Certainly, the experience of the tourist is influenced by the degree of familiarity with the destination and the possibility that the consumers has to organise and use all the services proposed by it. As a result, the destination is highly influenced in the perception of the consumer, by the specific product; therefore, the consumer satisfaction is greatly related to this factor. Anyway, the product offered by the destination is more than one because it has to adapt to the demand of the consumers that, as announced before, is very complex and varied. Different products and services can be combined to attract and satisfy different kind of segments.

1.1. Destination management, destination marketing and destination branding

The definition of "Destination Management" and "Destination Marketing" is not as simple as it may seem. These definitions have several shades according also from the cultural context in which they are used. The term "**Destination Management"** can be defined as « the coordinated management of all elements that make up a destination, including the attractions, amenities, access, marketing and pricing » (Solimar International)[9]. Moreover, the management of the destination mirrors the relationship between tourism and the environment; a relationship that has been intensified by the rapid changes of the demand and supply of this market. On the one hand, it is important to safeguard the natural and cultural resources of the destination, since larger amount of consumers means a higher commitment in the protection of the location. On the other hand, it is of vital importance to keep the peace with the international competition.

With the term "**Destination Marketing"**, we deal with a marketing function both inside the firm and inside the destination. According to the United Nations World Tourism Organisation,

> Destination Marketing covers all the activities and processes to bring buyers and sellers together; focuses on responding to consumer demands and competitive positioning; is a continuous coordinated set of activities associated with efficient distribution of products to high potential

[9] http://www.solimarinternational.com/tourism-development/destination-management

markets; involves making decision about the product, branding, the price, market segmentation, promotion and distribution. (UNWTO, 2004)[10].

In order to manage and commercialize specific localities or areas, it is essential to take into consideration that the consumer employs a series of services; therefore, he needs a suitable touristic offer. However, the supply is extremely diverse and so the offer has to be likewise varied. In recent years, we saw an increase in the wealth of people, hence there are more and more tourists from all over the world, and their needs are becoming more and more variegated. As a result, the complexity of the offer needs to increase. As such, the priority of the destination marketing will be the segmentation, the branding, the organization and finally promotion of different products for different segments. According to Manente and Cerato (2000), the aim of promotion is to:

differentiate the destination from its competitors and place it in the evocative set of the consumer. The decisions concerning the positioning, the segmentation choices, the image to convey, the characteristics to enhance, are among the most important decisions to make, since they can influence the perception that the consumer has about the destination (Manente; Cerato, 2000).

The two main problems of the destination marketing are its complexity and the lack of resources since the destination marketing offices and tourist organisations often do not have enough resources, proficiency or flexibility. Likewise, the mix of destination products and services, stakeholders, and experiences brings a lack of control on the overall situation. As the involved actors' interests often partly overlap, the destination marketing offices and tourist organisations need to mobilise resources, coordinate the processes and get to a final goal that will satisfy every actors and destinations. In order to do so, it is clear that a more cooperative attitude, instead of a competitive one, will be preferred, even if it will be often difficult to gain (Manente; Cerato, 2000). To conclude, destination management and destination marketing are seen as the keys to overcome the difficulties that the touristic industry has to face in these last years, due to a high competition among touristic regions and a more specific request from the guests. These are problems that can easily undermine the success obtained in the past. As an example, the globalisation caused issues because of a higher competition but also because it brought heavy consequences on the price side.

The "**Destination Branding"** is a part of the wider Destination Management. The study of the Destination Branding is a still new research theme, it has been defined as « the management process that leads to a strategic plan to build a brand identity based upon destination attributes selected on the basis of competitiveness, uniqueness and desired identity » (Gnoth, 2002). When explaining the concept of Destination Branding, we have to start from the concept of branding, which has been used

[10] http://www.unwto.org/destination/dmo/en/pdf/DMO_Final_report.pdf

extensively for products and services, however, in the tourism destination context, it is still a relatively recent phenomenon. It is becoming more and more important in the tourism sector, since it can be used as one of the strategic assets to provide a competitive advantage. According to the American Marketing Association (AMA) [11], brand can be defined as:

> a term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers[…]. A brand is a customer experience represented by a collection of images and ideas; often it refers to a symbol such as a name, logo, slogan, and design scheme. Brand recognition and other reactions are created by the accumulation of experiences with the specific product or service, both directly relating to its use, and through the influence of advertising, design, and media commentary (AMA).

By branding tourism products, it is possible to add a great value to them, creating a sort of unique identification. Desirable associations are linked to the destination in order to create a favourable image of it and attract tourists. In this way, it is possible to build an emotional relation with the consumer, communicating with him and eventually establishing trust, consistency and brand loyalty (Tasci; Kozak, 2006)[12]. However, unfortunately the communication and promotion of the touristic product and the touristic destination alone is not sufficient to obtain a significant response from the possible customers. A more comprehensive and complex management activity is necessary to obtain the wanted goal. For the destination product, the brand has a role in creating a *Destination image*, since it can arise perceptions, emotions and associations related to the destination. Moreover, it has also a role in creating a *Destination personality*. In this last case, the brand can create a relationship between the destination, the tourists and the entities that operate on the territory. The choice of a destination and the perceived image of a nation or of a territory constitute a guide (many times unaware) in the processes of decision and purchase of a product (Rajesh, 2013)[13]. The terms of destination image and destination personality will be further analysed later in this dissertation. Cantone, Risitano and Testa (2006) suggest that the choice of the elements that constitute the brand should be made accurately, with coherency and collaboration among the stakeholders, the destination and the various elements.

The essential components of the "Destination Brand" are the "Brand Identity" and the "Brand Image", which contribute to the management of the Branding. The set-up of the "**Brand Identity"** is a complicated process conducted after a having acquired a deep knowledge of the market, of the competitors and of the own weak and strong points and values. It can be defined as a set of expressive

[11] https://www.ama.org/resources/pages/dictionary.aspx?dLetter=B
[12] http://journals.sagepub.com/doi/abs/10.1177/1356766706067603
[13] http://www.pasosonline.org/Publicados/11313special/PS0313_07.pdf

features used by the firm to convey the values of a brand (Cantone; Risitano; Testa, 2006). However, the consumer often perceive the Brand identity in its own way mediated by its values and tastes; this discrepancy is the so called "**Brand Image"**. It represent the psychosocial meaning of the brand that is formed in the mind of the consumer and changes according to its personal point of view (Ekinci; Hosany, 2006)[14]. It can be defined as « The perception of a brand in the minds of persons. The brand image is a mirror reflection (though perhaps inaccurate) of the brand personality or product being. It is what people believe about a brand-their thoughts, feelings, expectations » (AMA)[15]. Finally, we have to discuss the "**Brand positioning"**, namely the valorisation of the distinctive attributes of the brand to get the attention of the prospective consumers (Betti; Forlani; Pencarelli, 2009). The one of the "Brand" is a theme of growing importance also because the fiercer competition among destinations, since the processes of acquisition and use of the service and products provided are highly influenced by the reputation and the values related to that specific destination. Since the brand of a territory creates positive or negative associations in the mind of the consumer, the challenge is to create a series of benefits that can be perceived by the consumer and can foster a positive final image of the destination. It is needed to identify the tangible and intangible benefits enjoyed by the tourists, which are the psychological and emotional rewards they link to the destination, what determines the value in the mind of the consumer and what creates the possibilities for the creation of a loyal tourist (Betti; Forlani; Pencarelli, 2009).

According to my opinion, the "**Communication"** is an essential element to sustain the marketing and the management of a destination. It comprises an "interactive communicative process with bidirectional and circular communicative fluxes that have to allow a reciprocal exchange and the transmission of values and messages to get precise pragmatic effects" (Betti, 2009). The main goal of the touristic communication is again to influence the idea and the behaviour of the possible consumer. The communication acts through the brand to identify the destination or the product, create a guarantee and a guide for the consumer. The brand has to create a constant dialogue among its material and immaterial, functional and evocative aspects. The destination and its stakeholders need to communicate with a variegated audience made by national and international tourists; as a result, they encounter difficulties in the definition of the strategies and international communication aims (Morgan; Pritchard; Pride, 2006)[16].

[14] https://core.ac.uk/download/pdf/78903047.pdf
[15] https://www.ama.org/resources/pages/dictionary.aspx?dLetter=B
[16]https://www.researchgate.net/profile/David_Gertner/publication/233497710_Country_as_Brand_Product_and_Beyond_A_Place_Marketing_and_Brand_Management_Perspective/links/53d933590cf2631430c3b208/Country-as-Brand-Product-and-Beyond-A-Place-Marketing-and-Brand-Management-Perspective.pdf

In the last years, many entities in contact with international environment chose the "Glocal" paradigm (the so called "Think global, act local"), aiming both at conforming to international standardisation norms and at the same time aiming at complying to local strategies. As a matter of fact, the communication of the destination and its image has to change and to adapt according to the receivers. The communications campaigns and the strategies need to understand (and identify with) the intercultural dimension of the consumers, their culture, values and the relative geographical and cultural context. Only knowing very deeply the culture of a certain tourist, it will be possible to understand its priority and needs regarding the destination.

1.2. Destination image and destination personality

The consumer cannot test the destination services and products prior to the purchase, therefore he needs to create an image of them and make the purchase decision based on this factor. As a result, «image plays a central role in destination choice matters, and obviously, the main goal of the destination is to influence possible consumers' choice through marketing activities» (Sonnleitner K. 2011)[17]. In addition, the destination image contributes to forming a destination brand and to creating its success. In tourism research, images are more important than any tangible resources because what motivates consumers to act or not to act are perceptions, rather than reality (Gallarza; Gil; Caldéron 2002)[18].

Research on "**Destination Image**" began in 1970s nevertheless, the definition of destination image varies since there is a lack of conceptual framework and there is still no consensus among researchers, however the most cited definition is that by Crompton « the sum of beliefs, ideas and impressions that a person has of a destination » (Crompton, 1979)[19]. In other words, according to this definition, the destination image is a mean to represent and simplify a larger number of information and imaginary associated with a place from the point of view both of an individual and of a group of people. As a matter of fact, « image develops from experience, orientation or knowledge and endorsements of stereotypical experience of an event. Further, image conceived by an individual can be positive or negative depending with the experience of information that an individual has received» (Ndalahwa Marshalls, 2007)[20]. By understanding and analysing this, the marketing sector can segment the market and formulate an appropriate marketing strategy. The analysis of the segments of the market and of the products offered have to be used for a definition of an image to convey to the tourist and at the same time to define a position in the mind of the tourist to create and maintain

[17] http://www.diva-portal.org/smash/get/diva2:424606/FULLTEXT01.pdf
[18] https://pdfs.semanticscholar.org/6d3c/884e7f930bfc631b05c12de205da3122560b.pdf
[19] http://journals.sagepub.com/doi/10.1177/004728757901700404
[20] http://www.diva-portal.org/smash/get/diva2:831608/FULLTEXT01.pdf

a competitive advantage against competitors (MaRs, 2013)[21]. The image of products and the destination are influenced by the identity of the destination itself, which in turn distinguish and modify the perception and the taste of the consumer. These perceptions are produced in different moment of the life of the consumer as such, before, during and after the visit. For this reason, the process of creation of the image is complex, variable and heterogeneous. It must be created through advertising, promotion and research of the information that influence the perception of the consumer (the understanding of the perception of the consumer, the analysis of desires and preferences and so on). This action of creation takes even place during the purchase and use of the product, when the consumer judges the destination and the services and creates a personal image of them (MaRs, 2013)[22].

"Destination personality" is defined as « the set of human characteristics associated with a destination » (Ekinci, Hosany, 2006)[23]. In the tourism literature, there has been a proliferation of destination image studies during the past 3 decades, but destination personality has been largely unexplored. Aaker (1997)[24], realizing this limitation and drawing on the big five model of human personality, developed the Brand Personality Scale (BPS), which consists of five generic dimensions: Excitement, Sincerity, Competence, Sophistication, and Ruggedness. Since then, the brand personality dimensions have been applied to various settings across different cultures to gauge consumers' symbolic consumption and their effects on behaviour. A distinctive brand personality can help creating a set of unique and favourable associations in the consumer memory, and thus building and enhancing brand equity Aaker (1997). A well-established brand personality influences consumer preference and help developing stronger emotional ties, trust, and loyalty with the brand. Similarly, a distinctive and emotionally attractive destination personality is shown to leverage the perceived image of a place and influence tourist choice behaviour (Ekinci, Hosany, 2006). The term Destination personality has been borrowed by the term "Product/Brand Personality" explained through Aaker (1997) definition previously in this chapter. It evokes emotional links between brands and consumers, and gives the latter a tangible reference point, which is vivid, alive, and more complete than the sense conveyed by a generic offering. According to Ekinci and Hosany (2006), « at the practical level, brands can be characterized by personality descriptors, such as youthful, energetic, extrovert, or sophisticated ». It is argued that, consumers view their preferred products as an extension of themselves, and therefore their purchasing behaviour is motivated by the symbolic value of the

[21] https://www.marsdd.com/mars-library/positioning-creating-an-image-of-your-product-in-your-target-customers-mind/
[22] https://www.marsdd.com/mars-library/positioning-creating-an-image-of-your-product-in-your-target-customers-mind/
[23] https://core.ac.uk/download/pdf/78903047.pdf
[24] https://www.haas.berkeley.edu/groups/finance/Papers/Dimensions%20of%20BP%20JMR%201997.pdf

product (Ilaw, 2014)[25]. Consumers can therefore satisfy and enhance their self-consistency and self-esteem through this kind of consumption (Ekinci, Hosany, 2006). Accordingly, when choosing among competing products, consumers assess the degree of similarity between the personality traits communicated by the product and the personality they wish to project of themselves (Aaker 1997). Human and destination personality may share a similar conceptualization, but they may differ in how they are formed. Perceptions of human traits are inferred on the basis of a person's behaviour, physical characteristics, attitudes, and demographic characteristics (Pervin, 1996).In contrast, perceptions of destination personality traits can be formed and influenced by the direct and/or indirect contact that the tourist may have had with the destination (Ekinci, Hosany, 2006)[26]. Anyway, since tourism destinations consist of a multiple set of tangible and intangible components associated with particular values, histories, events, and feelings, therefore, they are rich in terms of symbolic values and personality traits.

1.3. The psychology and behaviour of the tourists as consumers and the theme of consumer satisfaction

The behaviour and psychology of tourists

The behaviour and psychology of tourists here is explored to promote the understanding of how does image or perceptions of given destinations affects consumer's evaluation process. I will start by defining the concept of **Consumer Behaviour**, that is:

> the study of individuals, groups, or organizations and the processes they use to select, secure, use, and dispose of products, services, experiences, or ideas to satisfy needs and the impacts that these processes have on the consumer and society (Hawkins; Best; Coney, 2001).

Consumer behaviour involves certain decisions, activities, ideas or experiences that satisfy consumer needs and wants. It is «concerned with all activities directly involved in obtaining, consuming and disposing of products and services, including the decision processes that precede and follow these actions» (Engel; Blackwell; Miniard, 1995). Therefore, the processes involved in consumer behaviour decision-making are difficult to exemplify due to their complexity. The researchers over the years tried to developed models and categorizations to exemplify the complex behaviour of the tourists as a consumers of the tourism products and services. For instance, the **Consumer Decision Making Process** « is the method used by marketers to identify and track the decision making process

[25] https://www.elon.edu/u/academics/communications/journal/wp-content/uploads/sites/153/2017/06/01IlawEJFall14.pdf
[26] https://core.ac.uk/download/pdf/78903047.pdf

of a customer journey from start to finish» (Professional Academy)[27]. It entails to understand how the customer interacts with the marketing mix inputs, that is to say, of price, place, promotion, and product: the so-called four PS. However, the consumer buying behaviour is further influenced by many other elements that entail cultural, sociological, personal, and psychological factors.

According to the article written by Lumen Learning[28], Consumers/Tourists can be categorized into five behaviour stages namely: (1) need recognition, (2) information search, (3) evaluation of alternatives, (4) purchase, and (5) post purchase evaluation. The "Need Recognition" occurs when a consumer identifies a need and recognizes a product or a service that might satisfy his need. In the tourism and recreation area, this need can be of relaxation, discovering new places and so on. Once a need or want is identified, the consumer then begins to carry on an "Information Search". It is the stage in the process where the consumer is stimulated to search for more information or recalls past information stored in the memory. The consumer can gather information through documentation (product review, specialised press or online), advertisement or third parties, he may also ask for recommendations from relatives or friends. It is essential that marketers understand the sources from which customers draw their information in order to influence the decision process. Once sufficient information is gathered, the consumer will then "Evaluate The Alternatives" generated that may potentially meet his needs. When choosing a holiday destination, the consumer will compare different destinations, services and prices. At this stage, the consumer can be influenced by external factors as people around him or unexpected situational factors (Hanlan; Fuller; Wilde, 2005)[29]. The Purchase and Post-Purchase stages are still part of the decision process since the consumer can react in different ways as regard to the product or service purchased; he can be fascinated, satisfied or either disappointed. The relationship between consumer expectations and their perception of product performance will determine their satisfaction level (Kotler; Armstrong, 1999). It is quite clear that marketers have to understand the customer's needs and keep his satisfaction levels high, as such, it will be easier to retain the customer and there will be higher possibilities he will spread a positive word of mouth and attract more customers. The purchase phase can vary a lot according to the way the tourist want to approach with the destination. Obviously, if he will chose a package holyday, the process will be easier and quicker. In some travel situations, travel to and from the destination may be a major part of the travel experience as in the case of long haul international travel. It is indeed an essential part of the process that can bias the entire holiday as such it has to be taken in serious account (Kotler; Armstrong, 1999). When on site, the consumer will be finally able to evaluate the real product

[27] https://www.professionalacademy.com/blogs-and-advice/marketing-theories---explaining-the-consumer-decision-making-process
[28] https://courses.lumenlearning.com/boundless-marketing/chapter/the-consumer-decision-process/
[29] https://pdfs.semanticscholar.org/b333/055978481a8317b3b105d0366ad7b76d2f3f.pdf

and compare it with its perception. This stage incorporates the actual travel experience and is influenced by a wide number of service providers including the accommodation and recreation facilities, retails services and interaction with other travellers (Hanlan; Fuller; Wilde, 2005)[30]. As such, the fragmented nature of the holiday creates difficulties in evaluating the whole of it. However, in conclusion if the expectations of the consumer will not be met, he will experience dissatisfaction, otherwise he will be satisfied of the holiday done and can spread a good word of mouth and eventually revisit the place.

Customer satisfaction in tourism

The theme of satisfaction and of securing consumer loyalty is becoming of extreme importance in the increasingly competitive scenario of the recent years. It is indeed always more difficult to gain new customers and retain the old ones. Satisfaction is viewed as a central consumer behaviour construct because the extent to which consumers are satisfied influences future organisational performance (Cohen; Prayag; Moital, 2014)[31]. The loyalty of the consumer produces many benefits, among which are lower transition costs, higher frequency of purchasing and lower general costs, thanks also to the word of mouth as a means of advertising (Pechlaner; Weiermair, 2000). Trust and loyalty is perhaps the most powerful tool available for building and retaining relationships with customers. "Trurst" can be defined as « willingness to rely on an exchange partner in whom one has confidence» (Moorman; Deshpande´; Zaltman, 1993)[32]. The customer satisfaction is essential and has to be measured carefully since it is one of the vital conditions for the success of a destination. The customer satisfaction is measured through a process of comparison. The customer compares its expectation with the services perceived. In other words, «the customer satisfaction is the discrepancy perceived by the customer between the services expected and those experienced» (Pechlaner; Weiermair, 2000). The overtaking of the expectations will bring to a satisfaction and to a creation of loyalty. On the contrary, a negative experience will lead to a negative word of mouth and a subsequent change of destination. However, the correlation between the customer satisfaction and the creation of loyalty is not linear since the simple fulfilment of the customer expectations alone is not enough to build a strong loyalty (Narayandas, 1996). As such, it is needed to offer to the client something that he hopes to find, but also something that he does not expect, in order to raise a sentiment of excitement. During the management of the customer satisfaction, it is crucial to understand the desires and needs of the customers in order to try to predict future needs of the customer. In addition, it is interesting to

[30] https://epubs.scu.edu.au/cgi/viewcontent.cgi?article=1142&context=comm_pubs
[31] https://www.tandfonline.com/doi/pdf/10.1080/13683500.2013.850064
[32] https://faculty.fuqua.duke.edu/~moorman/Publications/JM1993.pdf

measure and compare the customer satisfaction of one destination's products with the customer satisfaction of another destination's products in order to understand the perception of the customer and amend in case of problems.

Despite the large body of literature available on satisfaction research in general, only a few academic studies have focused directly on customer satisfaction amongst tourists. According to Foster[33]:

> The tourism industry consists of a number of different sectors, including the travel, hospitality and visitor services sectors. Within each of these sectors, there is a number of individual enterprises that provide a range of services to people who are travelling away from their home environment.

This travel could occur for a variety of reasons, including pleasure, visiting friends and relatives, working reasons, and so on. Furthermore, tourists visit destinations and engage in various activities while there. All these variables create a tangled net, which complicates the analysis of the tourist satisfaction. The tourist satisfaction analysis is an important tool on which success of a tourist destination depends. It is clear that it has a positive effect on both economic returns and brand loyalty (Foster)[34]. A review of the literature on customer satisfaction reveals that satisfaction stimulates repeat visits, positive recommendations, new customers, reputation enhancement, higher acceptance of price increases and, consequently, overall higher profitability (Disegna, Ostib, 2013; Munier, Camelis, 2013)[35]. Nowadays, business in tourism impose new trends, conditioned by an increasing number of tourists, who are more and more demanding; therefore, the task to satisfy them is not a simple one. Kotler et al. (2006) emphasizes that «tourist satisfaction depends on degree of realised success in delivering the products and services in relation to tourist expectations». Since the value that can be realised in tourism is conditioned by customer satisfaction, stakeholders at a tourist destination must jointly design guidelines to improve their model of business. (Milošević; Penezić; Mišković; Škrbić; Katić, 2016)[36]. Through the analysis of the level of appreciation and satisfaction, it is possible to value the expectations of the tourists, select the critical and successful factors and improve the offer. According to a study conducted by The Bologna University (2005)[37], in order to do an appropriate analysis, the Impact Matrix can be used as follows:

[33] https://www.researchgate.net/publication/228974208_Measuring_customer_satisfaction_in_the_tourism_industry
[34] https://www.researchgate.net/publication/228974208_Measuring_customer_satisfaction_in_the_tourism_industry
[35] http://pro1.unibz.it/projects/economics/repec/bemps14.pdf
[36] https://www.fthm.uniri.hr/files/Kongresi/THI/Papers/2016/THI_April2016_219to231.pdf
[37] http://www2.stat.unibo.it/mignani/Didattica/economia/customer%20e%20destinazione.pdf

IMPACT MATRIX

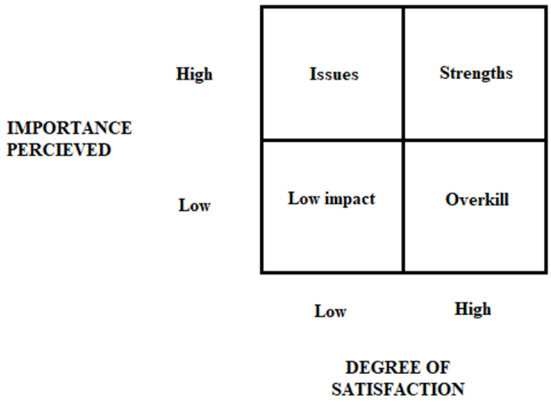

Fig. 1.1. Source: Università di Bologna, 2005

The four areas to be analysed, according to Bologna University (2005)[38], are (1) issues: areas that need to be improved, which need the higher attention of the organisations in order to offer better services; (2) strengths: the services here are really appreciated by the tourists, therefore, they are the strong suit of the tourist destination image; (3) low impact: these services are considered of low importance, hence, they absorb few resources of the organisation; (4) overkill: maintenance areas, which are important and deserve high level of attention by the tourism organisations.

1.4. Country and culture related influences

The country of origin effect (COO)

The formation and evaluation of an image refers to the studies of Hofstede, whereby people within a culture share common beliefs, meanings, values, attitudes and norms. Hofstede himself defined **Culture** as «the collective programming of the mind that distinguishes the members of one group or category of people from another» (Hofstede, 2001). The influence of these values is expressed through lifestyle and consumer behaviour patterns, therefore it would be expected that cultural background affect the way people view images of tourism destination. Moreover, the perception of the image is shaped also by personal, psychological as well as social factors. According to Beerli and Martin (2004) «the **Country Of Origin** is the socio-demographic characteristic which exert the greatest influence on both cognitive and affective components of image».

A brand's country-of-origin can influence the brand's perceived positioning by reducing perceived risks, acting as a guarantee and enhancer for the positioning strategy. Thus, it can influence consumers' buying decision process and offer a significant competitive advantage. At the other

[38] http://www2.stat.unibo.it/mignani/Didattica/economia/customer%20e%20destinazione.pdf

end of the spectrum, country-of-origin associations can negatively affect the brand positioning strategy (Cristea, Capatina, Stoenescu, 2015)[39].

As a result, it is presumed that it would be useful for the marketing sector to follow different communication strategies depending on the tourists' country of origin. Research in international marketing has proven that country associations do lead to customer bias, and this bias depends on how a customer views the image of a country (Stepchenkova, 2015) [40]. The general consensus is that the better the country image, the more likely the product of that country will be popular with consumers. As such, feelings of animosity caused by economic or political conflicts of feelings of national pride and ethnocentrism can have a bad influence for the destination and the relative products (Stepchenkova, 2015). « French wine, German cars, Japanese robots, Columbian coffee, Italian fashion, Singaporean efficiency, Belgian chocolate: somewhere in our minds, these products and services are associated with particular countries owing to their legacy, culture, or lifestyle» (The Economist Group, 2013)[41]. Actually, Thakor and Kohli (1996) defined the concept of "**Brand Origin**" as «the place, region or country to which the brand is perceived to belong by its customers». To highlight the importance of this effect, I can also say that some brands have even been given foreign names, to create a perceived COO effect. I bring as example US-based ice cream company Häagen-Dazs, which has a Scandinavian-sounding name to convey an aura of the old-world traditions and artisanship (The Economist Group, 2013) [42].

There is a link between the destination image of a particular country and its national image. Thus, destination image includes information from non-commercial sources regarding various historical, social, economic and political aspects about a certain country or destination. The two terms have different meanings, since, as explained before, destination image refers to imaginary destination perceptions. "**Product country image**" is defined instead by Sonnleitner (2011)[43] as the perception of countries concerning purchases whose production is related to these countries. The product is considered to be the destination experience itself rather than goods and services as depicted in a general way (Sonnleitner, 2011). Every destination's goal is to influence possible tourist's decision-making and choice through marketing activities, therefore attract them to the destinations. Image is worthy in identifying and comprehending tourists' destination selection process, it is indeed clear that there is a correlation between destination image and visitation intention. According to Jenkins

[39] https://core.ac.uk/download/pdf/82489101.pdf
[40] https://scholarworks.umass.edu/cgi/viewcontent.cgi?referer=https://www.google.com/&httpsredir=1&article=1148&context=ttra
[41] http://going-global.economist.com/en/2013/11/20/country-of-origin-effect/
[42] http://going-global.economist.com/en/2013/11/20/country-of-origin-effect/
[43] http://www.diva-portal.org/smash/get/diva2:424606/FULLTEXT01.pdf

(1999)[44], a destination image is the expression of all objective knowledge, impressions, prejudice, imaginations, and emotional thoughts and individual or group that might have of a particular place.

It is essential to keep in mind that travellers may not be driven by the same social, cultural and biological needs. There is always the possibility that others see the world in a different way, their needs and approaches to the destination will be therefore different. Nowadays, motivation receives a great deal of attention from tourism academics, given its importance in marketing decisions such as segmentation, product development, advertising and positioning. "**Motivation**" can be described as «psychological/biological needs and wants, including integral forces that arouse, direct and integrate a person's behaviour and activity» (Cohen, Prayag, Moital, 2014)[45]. The early researchers stated that there are basic motives for travelling (escape, relaxation, relief of tensions, sun lust, health, status, education, social contact, family relation, self-discovery, business), of course these motives changes accordingly to the changes of the tourism sector and of the tourist tastes(Cohen, Prayag, Moital, 2014). Therefore, it is possible to say that a key in understanding travel motivations is to view vacation travel as a mean to satisfy ones needs and wants.

Recently the BRIC nations (Brazil, Russia, India and China) have acquired the status of centre of economic growth, hence their outbound tourism increased too thanks to the increase in people's wealth. European and western tourism organisations and institutions need a solid understanding of their travel attitudes, expectations, motivations, preferences and perceptions, in order to effectively host tourists from these nations.

The Country Brand Index

Nowadays, several indexes aim at measuring the **Nation Branding** and the global perceptions of countries across several dimensions. The Nation Branding has been defined as «the application of corporate marketing concepts and techniques to countries, in the interests of enhancing their reputation in international relations» (Kerr, Wiseman, 2013)[46]. Among those indexes, one of the most influential is the **Country Brand Index**, conceived by the leading brand consultancy *FutureBrand*. It highlights the importance of the Country Of Origin Effect, trying to understand country brand strength, and in particular, its role as a driver of consumer choice. «The Index has historically studied perceptions of 118 countries around the world in the same way we measure consumer or corporate brands – ranking them according to strength of perception across association dimensions» (FutureBrand, 2014-15)[47]. One of the aims of the Index is to see if strong perceptions actually lead to

[44] http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.390.9401&rep=rep1&type=pdf
[45] https://www.tandfonline.com/doi/pdf/10.1080/13683500.2013.850064
[46] http://www.gbv.de/dms/sub-hamburg/717140253.pdf
[47] https://www.futurebrand.com/uploads/CBI2014-5.pdf

decisions to visit, recommend and do business with a country. According to related studies, countries can be construed as the sum of their identity and reputation; consequently, their perception can influence people decisions, when it comes to choose places to visit. The Index can be seen as a proactive way to improve the countries level of tourism, education, quality of life and so on.

The report carried out by FutureBrand (2014-15) discovered that, when rating countries as a brand, people are more keen on visit them or do business with them; hence, it proves that being seen as a country brand provides a competitive advantage. According to the report, not all countries can be seen as brands, but when they do so, they acquire a good competitive advantage. However, despite what one can think, being well known does not always bring to strong positive associations. The perception of the country is determined by FutureBrand, using the "Hierarchical Decision Model" (HDM), which assesses the people perception through six items. (1) Awareness: that is the level of knowledge of the country and its key features. (2) Familiarity: the mental associations made by people when thinking of a certain country. (3) Associations: in what way audiences do rank the country. (4) Preference: if a country can be considered for tourism, doing business, and so on. (5) Consideration: to what extent people really follow their perceptions. (6) Decision/Visitation: if people do recommend the country as a destination or as business partner to family, friends and colleagues.

ASSOCIATION DIMENSIONS

STATUS			EXPERIENCE		
VALUE SYSTEM	QUALITY OF LIFE	BUSINESS POTENTIAL	HERITAGE & CULTURE	TOURISM	MADE IN
Political freedom	Health & education	Good for business	Historical points of interest	Value for money	Make products that are authentic
Environmental standards	Standard of living	Advanced technology	Heritage, art & culture	Range of attractions	Make products of high quality
Tolerance	Safety & security	Good infrastructure	Natural beauty	Resort & lodging options	They create unique products
	Would like to live/study there			Would like to visit for a vacation	Would like to buy products made in that country
				Food	

Fig. 1.2. Source: FutureBrand 2014-15

The countries with a higher level of Quality Of Life, Value System and Business Potential are classified by FutureBrand (2014-15)[48] as "status countries"; instead, the countries whose strength points are Heritage and Culture, Tourism and Made In, are classified as "experience countries" and are associated with tourism. For the above-mentioned countries, economic success can be considered an important index to verify the strength of the brand of a country. Clearly, it cannot be strong if the country does not achieve financial gains from national and international visitors. If tourists perceive the country's brand as successful, they will travel to the destination with a stronger intention (Bloom Consulting, 2017-2018)[49].

Lately, traditionally renown touristic countries such as Italy, Spain, France and Germany are losing ground, outclassed by new superpowers which ranks high in both tourism and business fields such as China, the United Arab Emirates, South Korea, Thailand, Israel and so on. It can be argued that, in terms of growth, Europe is losing its competitive edge over the rest of the world, more specifically over the rising Asian markets (World Economic Forum, 2017)[50]. In these countries, travel and tourism competitiveness is improving, both for the industry growth and for the increasing share of international visitors, who are coming from and travel to emerging and developing nations. This may be due to the fact that, as established powers, these countries feel empowered enough to relax and did not improve further their offers. In the past decades, travel and tourism have been significant drivers of economic growth, due to European cultural richness, its good tourism service infrastructure, its international openness, as well as its perceived safety (World Economic Forum, 2017).

According to the report of the World Economic Forum (2017), Italy remains in 8th position, on a ranking of 136 countries. Despite the low commitment of the government, a lower perception of security and a weak brand strategy, the country's travel and tourism competitiveness is considerable and it is still driven by its exceptional cultural and natural resources and good infrastructures. Therefore, to improve the tourism situation and reinforce it competitively, Italy should solve the key issues about its weak business environment, its slow administrative procedures, the inefficient legal framework and business taxation.

[48] https://www.futurebrand.com/uploads/CBI2014-5.pdf
[49] https://www.bloom-consulting.com/en/pdf/rankings/Bloom_Consulting_Country_Brand_Ranking_Tourism.pdf
[50] https://www.weforum.org/reports/the-travel-tourism-competitiveness-report-2017

2. THE MAIN FEATURES OF CHINESE OUTBOUND TOURISM

From 1978 until today, the "Reform and opening policy" (Gǎigé kāifàng zhèngcè 改革开放政策), which started during the third session of the XI Central Committee of the Chinese Communist Party, has become one of the most decisive phenomena in China's recent history, whose fundamental importance is underlined by the interest it has received and still continues to receive from the rest of the world. The loosening of restrictions brought great benefits to the developing of the tourism in China, whereas before people were permitted to travel only for political reasons. More precisely, China's outbound tourism began in 1983, when visits to Hong Kong and Macau were allowed by the government (Li, 2015). Since that time, Chinese tourism has been developing impressively and it is expected to grow more in the years to come. China's transformation process, including the establishment of a "Socialist economic market system" (shèhuì zhǔyì jīngjì shìchǎng tǐxì 社会主义经济市场体系) has played an increasingly important role in the present era of globalization. In particular, over the last decade, the so called "Chinese miracle" (Zhōngguó de qíjī 中国的奇迹), in which, in less than ten years, internal consumption and the level of urban life increased greatly, has allowed China to aim at the position of leader in various international scenarios (Betta, Xin, Rognoni, 2013)[51].

Tourism has become one of the most dynamic sectors, thanks also to the growth rate of the citizens' income, to the increase in their spare time, looser rules and restrictions and a consequent growing interest in tourism: China has discovered the interest in travelling and knowing new cultures. According to the European Travel Commission (ETC, 2017)[52], in 2016, more than 1.2 million Chinese tourists reached Europe, therefore, it is desirable that in the future these numbers will continue to rise. China's tourism policy and orientation has followed a series of changes, entering a new phase, full of dynamism. It has become the largest domestic tourism market with the highest growth rate and the greatest potential in the world. Moreover, since China has become the fourth exporter of foreign tourists around the world, the Chinese Government decided to intervene strengthening this trend, acknowledging the importance of the tourism industry and the politics in relation to the new "Five-Year Programming" (Wǔ nián jìhuà 五年计划) that establishes the strategic plan and goals set for national socio-economic development (English.gov.cn, 2016)[53]. It naturally

[51] https://www.ufficiostampa.provincia.tn.it/binary/pat_ufficio_stampa/supplementi_trentino/REPORT_turismo_cinese.1365409719.1365493556.pdf
[52] http://www.etc-corporate.org/?page=report&report_id=103
[53] http://english.gov.cn/policies/latest_releases/2016/12/26/content_281475525601083.htm

includes new paths for achieving the goal of tourism, defined as the pillar of China's national industry. As reported by Il sole 24 ore (2016)[54], this aim is obviously related to the ambition of the Plan to increase the per capita income growth by 6.5% per year and beyond. In 2015, growth was 7.4%. Moreover, the goal of building a "moderately prosperous society" (Quánmiàn jiànchéng xiǎokāng shèhuì 全面建成小康社会), as Beijing calls it, is to double the 2010 gross domestic product by 2020 (Il sole 24 ore, 2016). The crisis in 2007 and 2008 has severely affected international tourism, leading to the trend of short-haul travel plans and to prefer business tourism over pleasure tourism and other types of tourism. Although global economic state of affairs is unstable, with turbulent situation in some areas, aggravated by an uncertain factor in the world tourism industry, Chinese outbound tourism continues to maintain a good pace of growth. Both the number of Chinese people travelling abroad and their relative consumption hit a new record.

In this chapter, I will firstly illustrate the Chinese economic and demographic trends, which resulted in the stunning economic growth and as a consequence of that, I will talk about the development of tourism and of the demand for international travel. The subsequent sub-chapter covers the subject of the peculiarities of the Chinese tourists, with a description of their needs, wants and trends. To conclude this chapter, I will show a series of archetypes of the new Chinese traveller that have been developed by the present literature. Since it is a new kind of tourism, it is always changing; therefore, it is difficult to render a detailed and correct photograph of the situation.

2.1. Economic and demographic trends: the development of tourism and the demand for international travel as a result of economic growth.

China has experienced a phenomenal economic growth over the past decade with GDP per capita outperforming other large emerging markets. The following in-depth analysis originated from the investigation of the *Oxford Economics for InterContinental® Hotels Group* (IHG®)[55], *McKinsey & Company* (2012)[56], the *United Nations World Tourism Organization* (UNWTO, 2017)[57][58], the *European Travel Commission* (ETC, 2017)[59] and *China Outbound Tourism Research Institute* (COTRI, 2016)[60].

[54] http://www.ilsole24ore.com/art/mondo/2016-03-05/il-piano-quinquennale-cina-dieci-punti-111526.shtml?uuid=ACrqHOiC
[55] https://www.ihgplc.com/chinesetravel/src/pdf/IHG_Future_Chinese_Travel.pdf
[56] https://www.mckinsey.com/global-themes/asia-pacific/meet-the-chinese-consumer-of-2020
[57] http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_barom17_05_october_excerpt_.pdf
[58] http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_barom17_03_june_excerpt_1.pdf
[59] : http://www.etc-corporate.org/?page=report&report_id=103
[60] https://www.cruiseindustrynews.com/cruise-news/16040-cotri-more-than-100-million-chinese-outbound-trips-for-the-first-nine-months.html

CHINESE GDP PER CAPITA COMPARED TO THE ONE OF THE MAIN ECONOMIES

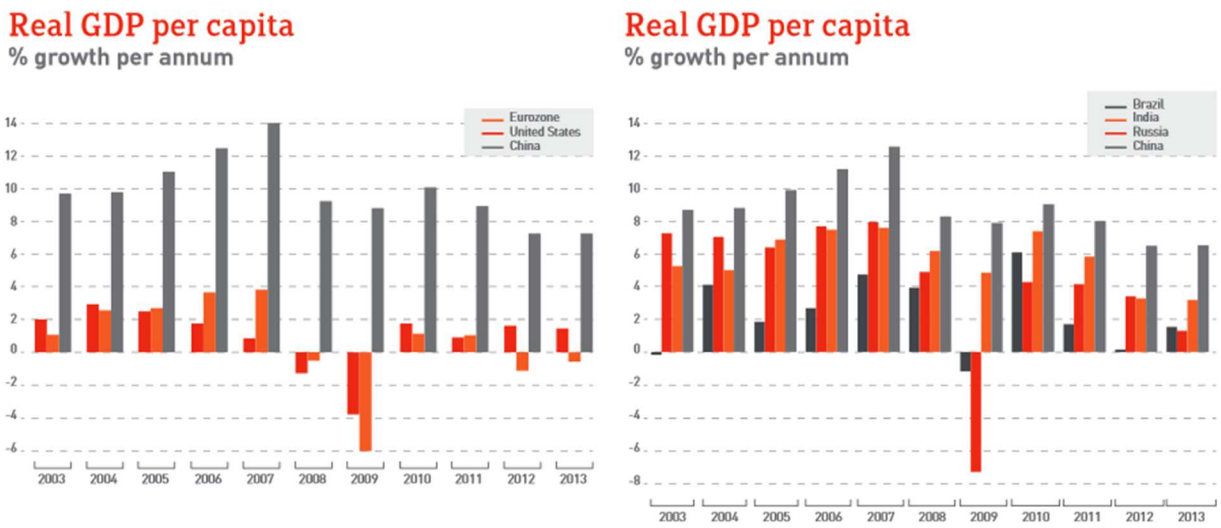

Fig. 2.1. Source: Oxford Economics for InterContinental® Hotels Group (IHG®)

As can be observed from the chart, the size of the Chinese middle class has risen steadily at the same pace of the average income growth. According to *IHG®, «*per capita GDP has increased by 148% over the last ten years: between 2003 and 2013, it grew at an average annual rate of 5.5% in BRIC economies and average income should continue to increase simultaneously with the economic growth». Changes in economic profiles have been and will continue to be the most important trend, shaping the consumer landscape. The Chinese people turned out to get richer faster than the past decades, since the per-household disposable income of urban consumers will double between 2010 and 2020, from about $4,000 to about $8,000. However, affluent consumers will remain an elite minority, making up only 6 percent of the population in 2020 *(IHG®)*[61].

While income is expected to rise across China, some cities and regions are already significantly wealthier than others are. The following map shows the percentage of GDP per capita in China. According to the data collected from scholars and researchers and from what we can see clearly in this map, the wealth difference between the poor inner regions and the richer costal ones is striking. The coastal regions are traditionally richer thanks to the proximity to the sea which eased the commercial and cultural exchange with foreign countries. Special economic zones (Jīngjì tèqū 经济特区) have been created in order to attract foreign investments, big investments have been made in infrastructure, transportation and so on, with the aim to support the economic development. The experiment worked so well, that people from still poorer regions flooded to the bigger and richer coastal cities to find work.

[61] https://www.ihgplc.com/chinesetravel/src/pdf/IHG_Future_Chinese_Travel.pdf

UNCOMMON PROSPERITY

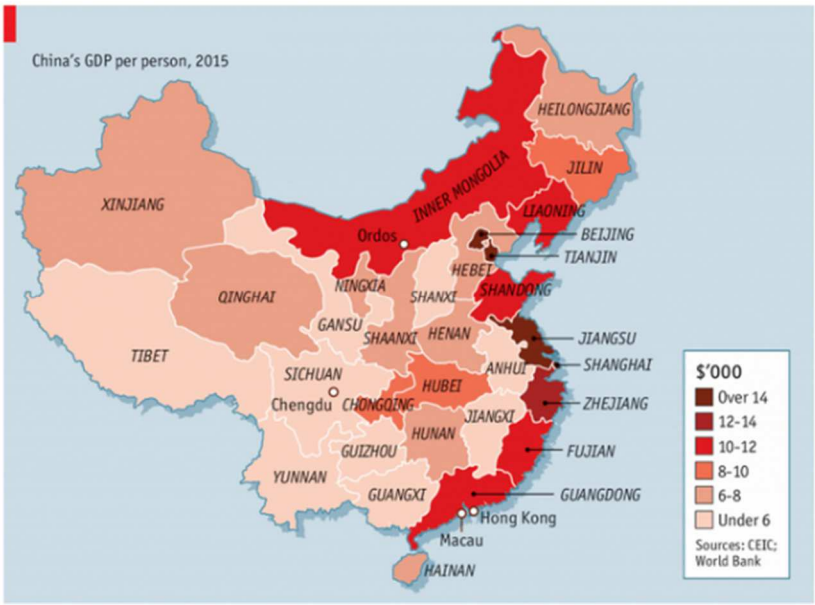

Fig. 2.2 Source:The Economist Group, 2016

One of the Chinese government's new goals is to leave no region behind and to reach a "Common Prosperity" (MBAlib)[62]. Xi Jinping's government (Xí Jìnpín 习近平, President of the People's Republic of China) promoted the building of roads, railways, pipelines and other inland investments. For this reason, particular emphasis has been placed to narrow regional income gaps. An example of this disparity is the one presented by the article of the Economist (2016)[63]: Shanghai, which is counted as a province, is five times wealthier than the poorest one, Gansu, which has a similar size population. Mr Xi's signature of the "One Belt, One Road" policy (Yídài yílù 一带一路), the "Silk Road Economic Belt and the 21st Century Maritime Silk Road" policy as it was previously called, (shìjì hǎishàng sīchóu zhī lù 丝绸之路经济带和 21 世纪海上丝绸之路) aimed partly at boosting economic ties with Central Asia and South-East Asia and thereby stimulating the economies of provinces bordering those areas (LIÚ; CHÉN, 2017)[64]. The initiative is geographically structured along six corridors, and the maritime Silk Road, with the purpose to «strengthen and expand cooperative interactions, create an integrated web of mutually beneficial economic, social and political ties, and ultimately lower distrust and enhance a sense of common security» (Swaine, 2015)[65]. In other terms, it is a political action to leverage the new strength of China, as stated by Michael D. Swaine in its commentary on the "One Belt, One Road" plan (2015):

[62] http://wiki.mbalib.com/wiki/%E5%85%B1%E5%90%8C%E5%AF%8C%E8%A3%95
[63] https://www.economist.com/news/china/21707964-government-struggling-spread-wealth-more-evenly-rich-province-poor-province
[64] http://www.xinhuanet.com/2017-05/14/c_1120969677.htm
[65] https://www.hoover.org/sites/default/files/research/docs/clm47ms.pdf

> While generally cast in positive terms as an effort to build and deepen positive-sum, mutually beneficial development ties, for some non-authoritative Chinese and many non-Chinese observers, the One Belt, One Road initiative and other economic policies are also seen as a means of strengthening China's political influence and security situation along its strategically important periphery.

Since its announcement, the "One Belt, One Road" initiative has steadily gained importance as a major element of Chinese foreign policy. As it can be inferred by the Chinese Government's actions, expected changes in China's income distribution, suggest that Chinese travellers will become more valuable to foreign destination markets in the next years. According to the research conducted by *(IHG®)*[66]:

> The number of low-income households with high propensity for booking short-haul trips and low-cost accommodations will more than double by 2023 On the other hand, travellers in the highest income bracket are most likely to opt for luxury accommodations and tend to spend more while on long-haul trips.

The following chart shows the difference of income levels and the prevision of its change in the next years. As can be seen, nowadays the great majority of the population consists of "value" consumers —those living in households with annual disposable incomes between $6,000 and $16,000, according to McKinsey & Company (2012)[67]. The difference among income levels will still persist, however, it is clear that the wealth of the population will increase, hence more and more people will be included in the so-called middle class and will have a higher spending power.

[66] https://www.ihgplc.com/chinesetravel/src/pdf/IHG_Future_Chinese_Travel.pdf
[67] https://www.mckinsey.com/featured-insights/asia-pacific/meet-the-chinese-consumer-of-2020

THE SHARE OF HOUSEHOLD IN EACH INCOME LEVEL WILL SHIFT DRAMATICALLY BY 2020

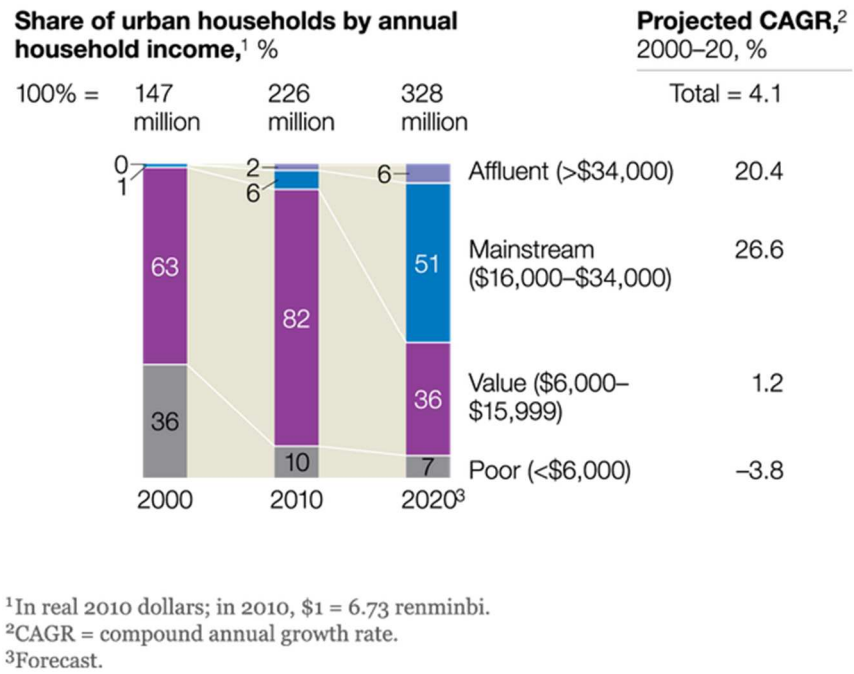

Fig. 2.3. Source: McKinsey & Company, March 2012

2016 year results on expenditure from major outbound markets reflect increasing demand for international tourism across the world, as reported in the latest UNWTO World Tourism Barometer (2017)[68]. Chinese travellers venturing abroad spent $261 billion on foreign travel in 2016, a 12% increase over 2015, and that represents a new record for global outbound tourist spending. Chinese tourists spent more than any other country's outbound travellers last year and are already the largest outbound travel market with 135 million Chinese traveling outside China last year (UNWTO, 2017). The influence of Chinese travellers, however, is expected to increase across the globe, and the research of the UNWTO (2017) estimates that 192 million Chinese tourists will travel abroad annually by 2021, spending $457 billion in overseas markets. In the chart below it is possible to see the striking increase in spending reported by the above mentioned researches.

[68] http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_barom17_05_october_excerpt_.pdf

TOTAL OVERSEAS SPENDING BY CHINESE TOURISTS, 2017E-2021E (USD BIL.).

Includes business and leisure travel; excludes day trips

Fig .2.4. Source: World Tourism Organization (UNWTO), 2017

The United Nations World Tourism Organization (UNWTO) and the European Travel Commission (ETC) [69] point out that the Chinese, even those with lower income levels, spend about 53% of their available income (excluding commodity costs) in travel. UNWTO Secretary-General, Taleb Rifai, announced that:

> The latest data on outbound tourism spending are very encouraging. Despite the many challenges of recent years, results of spending on travel abroad are consistent with the 4% growth to 1.2 billion international tourist arrivals reported earlier this year for 2016. People continue to have a strong appetite for travel and these benefits many countries all around the world, translating into economic growth, job creation and opportunities for development (Peltier, 2017)[70].

According to the calculations of *China Outbound Tourism Research Institute* (COTRI)[71], in the first nine months of 2016, a total of 101,5 million border-crossings from Mainland China took place. It is a striking number

[69] : http://www.etc-corporate.org/?page=report&report_id=103
[70] https://skift.com/2017/04/14/chinese-travelers-set-a-new-record-for-global-tourism-spending-in-2016/
[71] https://www.cruiseindustrynews.com/cruise-news/16040-cotri-more-than-100-million-chinese-outbound-trips-for-the-first-nine-months.html

BORDER CROSSINGS FROM MAINLAND CHINA

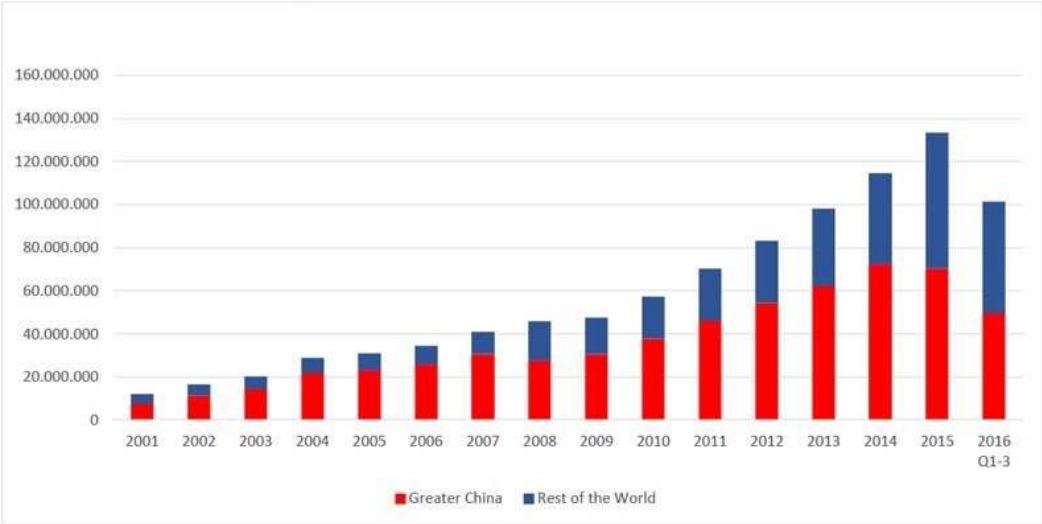

Fig. 2.5. Source: COTRI (China Outbound Tourism Research Institute), 2016

As can be inferred from the chart, according to COTRI 49.8 million, which is less than half of the total number, travelled within Greater China (Hong Kong, Macau, Taiwan), with the remaining 51.7 million trips going to other destinations outside China. These numbers represent an increase compared to the past years; therefore, we can deduce that Chinese people are more and more willing to travel inside and outside China. This fact can be due to many reasons, as for example, the increased wealth, the increased level of education and a change in the mind-set of people, which now feel the need to travel and know the rest of the world.

2.2. The peculiarities of the Chinese tourist

We can say that the current time is a very important period for Chinese outbound tourism, a crossroad between China and its frenetic evolution towards a modern image of itself. The Chinese people just started experimenting directly; as a result, the growth of Chinese outbound tourism can also be a precious opportunity for a new leap in the development of world tourism. In recent years, the Chinese government has promptly started to give various forms of political support to outbound tourism, by progressively loosening the conditions for leaving the country, or for example through licenses issued to travel agencies operating in the field of outbound tourism (Roma Capitale, 2013).

As it can be inferred from the recent data of the European Travel Commission (2017)[72], the Chinese tourist market is still largely based on **organized travel.** Even if a new type of individual tourism is starting to becoming popular. The Chinese travel experience in Italy is still based mainly on short stays in different locations. The motivations are both cultural and practical. Nevertheless,

[72] http://www.etc-corporate.org/?page=report&report_id=103

one of the main reasons is the tendency to increase the number of destinations during the same holiday. The European Travel Commission (2017) highlights that, across markets, Chinese respondents are the tourists more willing to visit multiple destinations while travelling in Europe. Europe is now the second destination for Chinese outbound tourists, due to the characteristics of this market, the different cultures of the countries on the same continent and the ancient history. Europe differs from China in terms of culture, art, history, architecture, as well as for landscape, habits, and so on. The richness of its cultural and natural heritage could combine different tourist types, different needs and packages. On average, Chinese tourists have four different countries in mind and identify France as the most probable destination for their next trip (60% France, 34% Germany, 30% Italy, 26% UK, 22% Switzerland) (IHG®)[73]. According to the UNWTO data retrieved in the report of *Agenzia Nazionale del Turismo Italia - ENIT* [74], in 2015 ranking of the world's most popular tourist destinations for foreign tourism, Italy confirms its 5th place for arrivals and its 7th place for revenues. Moreover, the researchers of *GfK Blue Moon* (2012)[75] noticed that there is a concentration of the distribution of the flows inside Italy in mainly four regions (84%): Lazio (with Rome), Lombardy (with Milan), Veneto (with Venice) and Tuscany (with mainly Florence, Pisa and Siena). These two last regions all together host nearly 50% of Chinese visitors. As we can notice from the chart by IHG®, Venice, Milan, Rome and Florence are on the top ranking for both city arrivals and city nights among other well touristic cities in Europe.

FAVOURITE DESTINATIONS FOR THE CHINESE TOURIST IN ITALY

Top city arrivals, Europe, 2013-2023

Rank	Market	Absolute growth ('000 arrivals)
1	Venice	358
2	Milan	350
3	Rome	346
4	Florence	339
5	Paris	210
6	Lucern/Lake Lucern	188
7	Frankfurt	143
8	London	130
9	Vienna	119
10	Istanbul	108
11	Tyrol	107
12	Munich	104
13	Zürich Region	99
14	Treviso	90
15	Padova	84

Top city nights, Europe, 2013-2023

Rank	Market	Absolute growth ('000 nights)
1	London	624
2	Milan	613
3	Rome	546
4	Venice	473
5	Florence	466
6	Paris	280
7	Istanbul	205
8	Munich	200
9	Frankfurt	199
10	Berlin	169
11	Lucern/Lake Lucern	119
12	Vienna	115
13	Zürich Region	77
14	Tyrol	67
15	Koln	66

Fig. 2.6. Source: Oxford Economics for InterContinental® Hotels Group (IHG®)

[73] https://www.ihgplc.com/chinesetravel/src/pdf/IHG_Future_Chinese_Travel.pdf
[74] http://www.enit.it/it/studi.html
[75] http://www.tourism.australia.com/content/dam/assets/document/1/6/w/s/6/2002038.pdf

With regard to the main destinations of Chinese outbound tourism, we can see from the chart below that Asian countries have always been the favourite places among all tourist destinations. Hong Kong, Macao and Taiwan accounted for 70.4 percent of departures. By adding the rest of Asia, the figure jumps to nearly 90 percent. Australia, Japan and Thailand too are achieving a new success. Precisely mainland Chinese travellers make up the second-largest source of inbound arrivals to Australia. Moreover, the weaker yen has helped attract Chinese visitors to Japan. Obviously, the factor that most influences the choice of destinations is still the price and in general, the distance between the place of origin and the one of arrival. Since the distance affects the final price of the tourist package, Asian countries have always received the Chinese tourist attention. However, nowadays with the appearance of new low-cost airline companies, new technologies and a wider use of Internet as a mean to search information, long-haul flights are always more frequent.

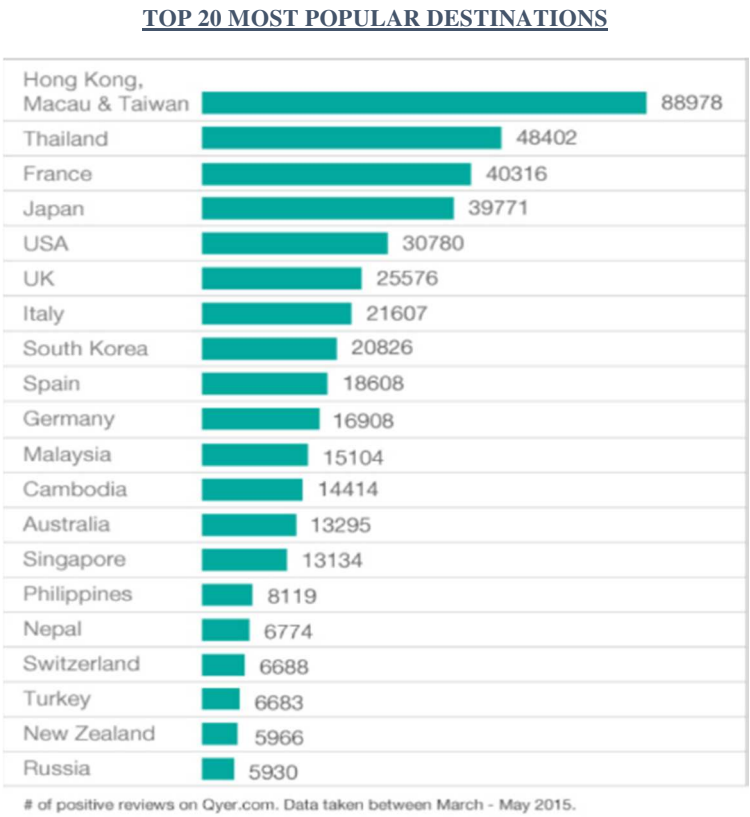

Fig. 2.7. Source: Resonance Consultancy, 2016.

Only since 2013, **individual tourism** has started to develop; although it has not yet reached the number of organized tours, it is growing at stunning rate per year. Individual tourism is of particular interest to Italy, since as on average these travellers stop in our country for a greater number of nights, they have a greater propensity to spend and are not induced by tour operators to make more stops in different countries, with that fast pace that has always distinguished the Chinese organized tours. The demand for one-destination packages is slowly growing, reducing the number of countries

visited and allowing more relaxed holidays. This trend is generally still experienced by travellers who already visited Europe once. Chinese travellers, especially if they are coming from a big city, start appreciating slow life, nature and a healthier lifestyle. This kind of travellers, who, according to many researchers are pioneers, «started to shift their spending towards more meaningful experiences, such as exquisite traditional dinings, extraordinary cultural journeys and even adventurous sports» (Wei, 2017)[76].

The **trend of Chinese tourist flows** is influenced by various factors, including (Kairos Future, 2016)[77]: (a) Long-distance monetary and time costs (Schengen area destinations are still a small segment of China's outbound tourism); (b) Scarce knowledge of European destinations, particularly outside Rome, Florence, Venice and Milan; (c) The availability of Chinese-friendly facilities; (d) The perception of safety. Researchers observed that between October 2015 and March 2016 there was a contraction in the number of Chinese travellers toward Europe, particularly in the central and southern areas, mainly due to security concerns, following the recent attacks that hit some European countries; (e) The low number of days of leave available to Chinese workers. Available time is indeed another indispensable factor for the development of outbound tourism; in fact, today's Chinese people enjoy at least three great opportunities for holidays abroad. It turns out that over 40% of China's outbound tourists travel during the following periods (China Highlights)[78]:

- Chinese New Year holiday (chūnjié 春节) lasting three days (from February16), also called Spring Festival, and it is the most important festival in China;
- Qingming Festival (qīngmíng jié 清明节) lasting one day (from April 5), beginning one of the 24 Chinese solar terms in China, it is also called Tomb Sweeping Day, and is for commemorating the dead.
- Labour Day (Láodòng jié 劳动节) lasting one day (May 1);
- Dragon Boat Festival (duānwǔ jié 端午节) lasting one day (June 18), a traditional Chinese festival with activities such as dragon boat racing and eating zongzi (粽子，sticky rice wrapped in leaves);
- Mid-Autumn Day (zhōngqiū jié 中秋节) lasting one day (September 24), a day for Chinese family reunions and a harvest festival in China;
- National Day (guóqìng rì 国庆日) lasting three days (October 1) the holiday for the celebration of the foundation of the People's Republic of China. From 1st October, for a whole week the

[76] http://usa.chinadaily.com.cn/china/2017-10/02/content_32752916.htm
[77] https://www.eutravelpartnerships.org/wp-content/uploads/2017/07/Tourism-flows-from-China-to-the-European-Union.pdf
[78] https://www.chinahighlights.com/festivals/china-public-holiday.htm

golden week occurs. According to the China Tourism Academy, this year, during the National Day Golden Week holiday, in China more than 710 million Chinese tourists will be travelling domestically or abroad, up 10% year over year. Total tourism receipts during Golden Week 2017 are expected to increase by 12.2% year over year and reach 人民币 590 billion, the equivalent of $89 billion (Weinswig, 2017)[79].

Chinese tourists like to search for a large amount of information related to their travel destination (Weinswig, 2017). As a result, the **search stage** is a key element in the formation of expectations. With regard to holiday information sources, the average Chinese tourist prefers information from websites and news from travel agencies, even if recognized by the national authority. Information on travel abroad is also extracted from newspaper advertisements and magazines, or thanks to the word of mouth among friends and relatives (Marketing to China)[80]. In this chart issued by Ipsos (2015)[81], we can see what Chinese people mostly research before a trip.

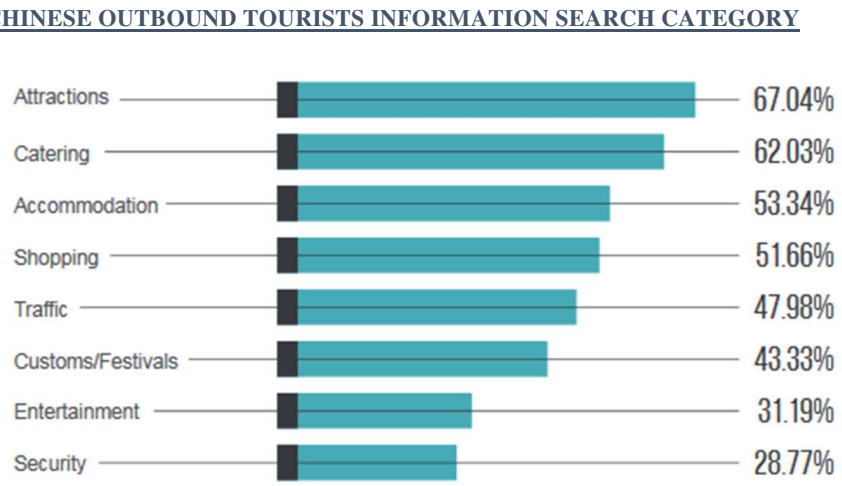

Fig. 2.8. Source: Ipsos, 2015.

Furthermore, as reported by Arlt Wolfgang Georg (2017)[82] the decision on which specific places to visit is often connected to famous people, or Chinese celebrities blogging about the beauty of European landscapes or the coolness of the latest fashion and nightlife. Online platforms are increasingly used by Chinese travellers to book their trips, or part of them, even directly via smartphones; such platforms constitute the future of individual Chinese tourism. Travelling consumers are a particularly dynamic market segment, as tourists are increasingly reliant on

[79] https://www.fungglobalretailtech.com/wp-content/uploads/2017/08/Chinese-Outbound-Tourists%E2%80%94More-Diverse-More-Sophisticated-August_10_2017.pdf
[80] https://www.marketingtochina.com/marketing-to-chinese-tourists-travellers/
[81] https://www.ipsos.com/sites/default/files/2016-06/021.1-Chinese-Outbound-Tourist.pdf
[82] https://www.forbes.com/sites/profdrwolfganggarlt/2017/02/22/how-chinese-travelers-view-europe/#4fb13cd15a33

technology to navigate the retail landscape and inform their spending, especially when travelling to new or foreign destinations (Weinswig, 2017)[83]. A study from *Forbes*, in collaboration with *Fung Global Retail & Technology* (2017)[84], showed that 28% of travellers, aged 18–29 consider social media their major information source for trip planning; while more than half of all surveyed travellers regard mobile payment as important when travelling abroad. Social media are a highly influential channel, since Chinese travellers share their personal experiences and recommendations with their friends and relatives on these platforms. As an example, the three most-mentioned items in the Chinese social media entries in favour of a trip to Europe were in accordance with Arlt Wolfgang Georg (2017)[85]: «Rich culture and History, Beautiful and unpolluted environments and Many photo opportunities. The three items which annoyed the visitors most were Language problems, Safety concerns and Bad (Chinese) Food».

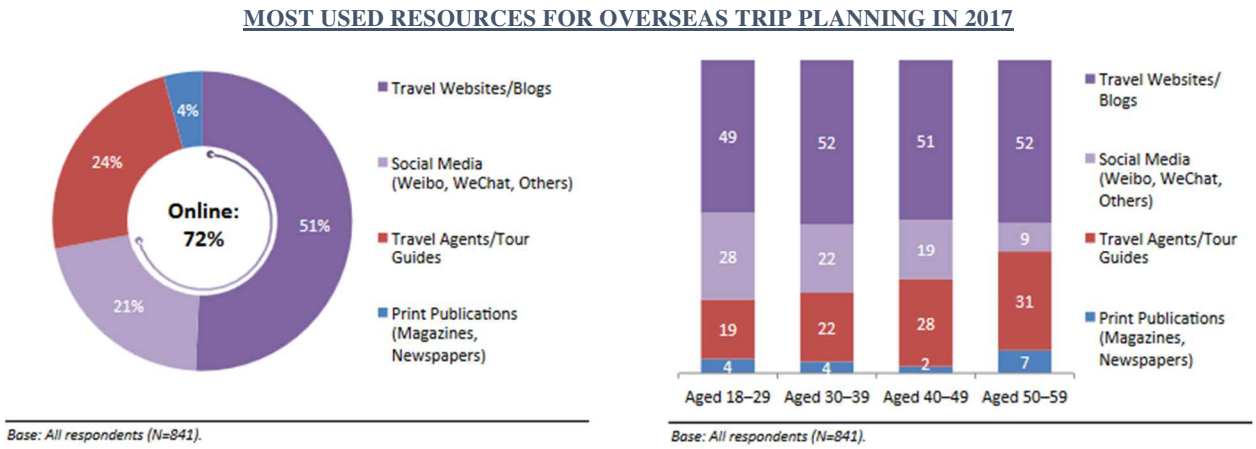

Fig. 2.9. Source: WEINSWIG, 2017

Despite the rise of social media in recent years, travel websites or blogs remain the most popular resource, used by Chinese tourists. This can be attributed to the comprehensive information available on websites and blogs, as compared to social media. Travel agents and print publications are more popular among travellers aged 50–59 as the main information source for trip planning, as can be seen from the chart retrieved from the report of *Fung Global Retail & Technology* (2017) [86].

«Countries such as Italy offer what Chinese tourists are looking for, said Alastair Morrison, former president of the International Tourism Studies Association and CEO of Belle Tourism International Consulting. He cites as examples art and culture of historic cities like Rome and

[83] https://www.forbes.com/sites/deborahweinswig/2017/08/23/retail-and-the-traveling-shopper-what-we-can-learn-from-chinese-outbound-tourists/#3de3625079ae
[84] https://www.fungglobalretailtech.com/wp-content/uploads/2017/08/Chinese-Outbound-Tourists%E2%80%94More-Diverse-More-Sophisticated-August_10_2017.pdf
[85] https://www.forbes.com/sites/profdrwolfganggarlt/2017/02/22/how-chinese-travelers-view-europe/#4fb13cd15a33
[86] https://www.fungglobalretailtech.com/wp-content/uploads/2017/08/Chinese-Outbound-Tourists%E2%80%94More-Diverse-More-Sophisticated-August_10_2017.pdf

Florence; romantic destinations such as Venice and Verona; fashion and luxury shopping in Milan» (Wang, 2016)[87].

He also suggests that Italy should take advantage of the fame that certain historical figures have in China. For example Marco Polo, Matteo Ricci, Leonardo Da Vinci, Michelangelo and so on, are known by the Chinese people too (Wang, 2016). These historical figures are fixed in the mind of the Chinese people and it can help to promote the touristic destination.

According to the Report provided by the *ETC (European Travel Commission), ETOA (European Tourism Association), Eurail Group G.I.E., TCI Research*: (2017)[88]. Europe's nature, famous landmarks and rich history are the key interest drivers for potential overseas travellers. In detail, 26% of Chinese travellers enjoy nature, 18% enjoy sightseeing and 14% enjoy learning about the history and cultural heritage. «The majority of respondents seek to combine some time spent enjoying Europe's natural attractions with visits to the region's famous landmarks, as well as undertaking other experiences that will enrich their knowledge about the culture and history of the region» (ETC; ETOA; Eurail Group; TCI Research, 2017). Chinese tourists are increasingly creating their own itineraries, with more unconventional experiences, and much more focused on local art and culture. According to the report published by *IHG*®[89], by 2023, pleasure travel will account for 62% of the total travel out of the Chinese market. Leisure travel has begun to represent a greater share of total Chinese travel demand. Therefore, long-haul leisure travel destinations are experiencing greater tourism flows from China. In the past, business travel was the most widespread type of Chinese outbound tourism, however now it is leaving space to different types of travel.

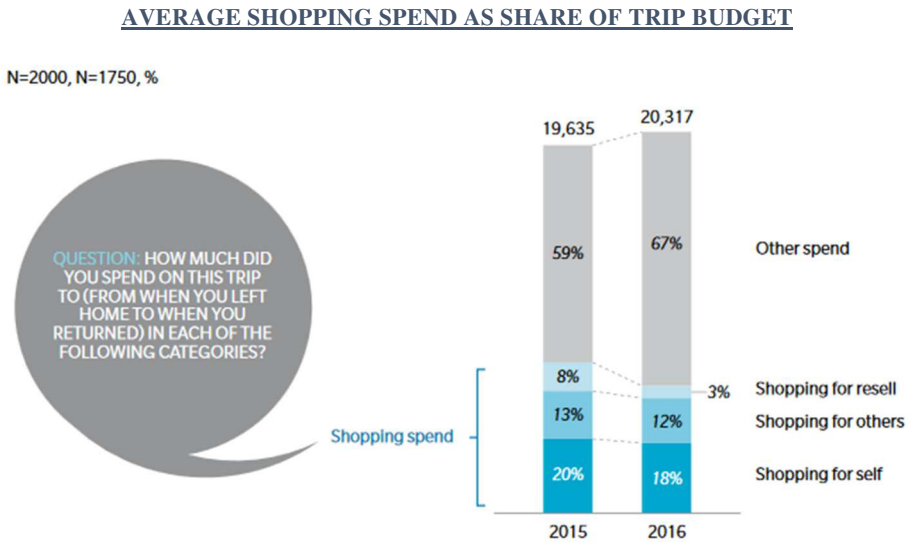

Fig. 2.10. Source: Williams, 2017.

[87] http://www.chinadaily.com.cn/world/2016-09/05/content_26775432.htm
[88] http://www.etc-corporate.org/?page=download-report&report_id=108
[89] https://www.ihgplc.com/chinesetravel/src/pdf/IHG_Future_Chinese_Travel.pdf

According to the annual survey by the booking sites *Hotels.com* and *Ipsos* (2017)[90], shopping is no longer the priority for Chinese tourists. Tourists will spend less on shopping, more on dining and sightseeing as overseas travel becomes more mainstream, and the lure of foreign prices diminishes. The previous considerations are supported by the data provided by Source: Williams (2017)[91] in the report edited by *Oliver Wyman* research institute. We can observe that the percentage of the budget set for shopping is decreasing, this can be due to the fact that price differential are shrinking and cross-border ecommerce is gaining great successes. Moreover, «overseas travel is becoming more mainstream, and as a result, the average disposable income of travellers has decreased» (Hancock, 2017)[92]. On the other end, the average length of trips jumped significantly, bringing greater spending on accommodation, entertainment, and food and beverages. However due to the huge dimension of the Chinese outbound travel market, shopping will continue to play an important role for European consumer brands, retailers and service industries (Williams, 2017)[93].

The paper issued by *Nielsen*, a global leading information and measurement company, and *Alipay*, the world's largest mobile and lifestyle platform discovered that «Chinese tourists use mobile payment overseas far more frequently than their non-Chinese counterparts, and over 90% Chinese tourists would use mobile payment overseas given the option» (Nielsen, 2018)[94]. The younger generation of Chinese people use the Net extensively; they are leading the world trend of Internet use for payment and a wide range of services that in Europe struggle to get a foothold. The preferred method of payment across age groups is *Union Pay*, followed by *Visa Card*, cash, *Alipay*, *MasterCard* and *WeChat Pay*. Obviously, there is overlap of payment methods with travellers using a number of different methods depending on available facilities. However, since Europeans are not used to pay via the Internet, these services as *Union Pay* and *Alipay* are not commonly accepted overseas.

2.3. Archetypes of the new Chinese traveller

Chinese tourists may be distinguished into a variety of groups, according to age, regions, and incomes. Depending on these factors, Chinese tourists will prefer different types of tourism and experiences. It is therefore clear that attracting Chinese tourists is no longer one-size-fits-all. Shown below are some categories of Chinese tourists that I retrieved from the literature integrated with the latest discoveries, in order to create an updated categorization that will help organisations that deal

[90] https://www.ipsos.com/sites/default/files/ct/publication/documents/2017-08/CITM_2017_Report_English.pdf
[91] http://www.oliverwyman.com/content/dam/oliver-wyman/v2/publications/2017/jul/The_Chinese_Traveler_of_today_and_tomorrow_WEB.pdf
[92] https://www.ft.com/content/f34c4116-710e-11e7-aca6-c6bd07df1a3c
[93] http://www.oliverwyman.com/content/dam/oliver-wyman/v2/publications/2017/jul/The_Chinese_Traveler_of_today_and_tomorrow_WEB.pdf
[94] http://www.nielsen.com/cn/en/insights/reports/2018/nielsen-over-90-percent-chinese-tourists-would-use-mobile-payment-overseas-given-the-option.html

with Chinese tourists. Three main categories of tourism include Free Independent Travellers, Mainstream Travellers and Luxury Travellers.

Free Independent Travellers (FIT)

This new group of "individual" tourists is a new wave of tourists advancing, and is characterized by a high-quality service rather than low-cost group tours. In line with the *Resonance Consultancy Ltd* report (2016)[95], the number of FITs is growing at a stunning pace.

> Booking sites like Ctrip, Qyer, Qunar and Elong have enabled a youth population of educated, tech savvy and globally-minded travellers to organize their own trips and create their own adventures from scratch. Independent travel has spurred new activities that weren't available during the years of guided bus tours" (Resonance Consultancy Ltd, 2016)[96].

Moreover, according to the *2016 Skyscanner report on Chinese Free Independent Travellers and Overseas Consumption* (Tianxun; UnionPay Smart, 2017)[97], young Chinese tourists travelling abroad are increasing, with 64% of outbound travellers aged between 15 and 33 years old, the so called "Millennials" (later defined in this chapter). The *Boston Consulting Group* (Barton; Koslow; Beauchamp, 2014)[98] reports that the millennial generation is more interested than older generations in travelling abroad. They are spending less time in main cities and instead exploring more remote destinations, staying in hostels instead of hotels, and choosing long-term backpacking trips instead of two-week trips. They have a particular interest in the culture of the tourist destinations, they are keen on trying local foods, and they are interested in entertaining relationships with the different local people. Contrary to the mainstream Chinese tourists who like shopping and buying luxury goods, they are curious to live different experiences and they try to enrich their information on less known destinations. They are going further (to Western Europe, the US and Canada) and are willing to experience a more intrepid travelling style; through the analysis of the above researches, we can infer that this trend can be due to their increased earning capacity and their desire to differentiate from their parents. Touristic organisations, however, are not yet ready to deal with them, both in terms of knowledge of their preferences and of the right services to offer.

The so-called" **Millennials**" (Qiān xǐ yīdài 千禧一代) are those born in the 1980s and '90s. Simson (2016)[99] reports that Chinese young people «represent one of the biggest populations of the millennial group: 60% of millennials worldwide live in Asia, with a third originating from either

[95] https://www.discoverlosangeles.com/sites/default/files/media/B2B/RES-Portrait-Chinese-International-Traveler-5.pdf
[96] https://www.discoverlosangeles.com/sites/default/files/media/B2B/RES-Portrait-Chinese-International-Traveler-5.pdf
[97] http://www.pinchain.com/article/102911
[98] https://www.bcg.com/publications/2014/marketing-center-consumer-customer-insight-how-millennials-changing-marketing-forever.aspx
[99] https://apex.aero/2016/09/20/chinese-millennial-traveler

China or India […] they make up nearly a third of the total Chinese population» Simson (2016). Chinese millennials are often wealthy, since among Asian millennials they are the biggest spenders, educated, and technologically proficient. They were born under the "Once Child Policy", so they are likely to be only children and only grandchildren, therefore there is often the possibility that they grew up with plenty of family attention. (Quinn, 2014)[100]. As a result, they have greater spending power than the generations that came before them. They are very different from their parents, since they were born in a completely different situation. According to the report provided by *Airbnb* (2016)[101], even their travel habits are very different from an older generation of Chinese tourists. 93% of Chinese millennials say that travelling is an important part of their identity. They are much more interested than their parents are in having unique experiences and in understanding local life and culture.

Chinese millennials feel more confident when travelling abroad than their parents feel, and have a clearer idea about what they want from their travel experience. They indeed are highly motivated by their peers when it comes to making travel decisions. The *Hurun Report* (Hoogewerf; Fang Roe, 2016)[102] showed that, friends' word of mouth was actually the most common inspiration to travel, nearly 40%. Outside their own social circles, the millennial generation is also most likely to be influenced by "**Key Opinion Leaders**" **(KOLs)** (yìjiàn lǐngxiù 意见领袖). As stated in the *Dragon Trail Interactive Report* (Parulis-Cook, 2017)[103], 79% of millennials are using their phones to access WeChat, hence this platform is crucial for reaching this target. Key Opinion Leaders are social media influencers, some of which are known all over the world and, as the Western ones, they earn a lot too, therefore using KOLs as a marketing way could be very expensive. For example, celebrities such as famous actors, singers and TV personalities, can be over one million RMB (She, 2017)[104]. Knowing their personality and interests is clearly very important before asking their help. According to a research made by *Forbes* (Escobedo, 2017)[105], there are mainly five types of Chinese KOLs: the TV Celebrities, the Wanghong (wǎnghóng 网红) or web celebrities, the Bloggers with a community of followers around them, the Web media which are mainly small media companies and, to conclude, Industry-specific KOLs who focus on a certain topic. According to the article of Forbes (Escobedo, 2017)[106] the most efficient ways to get in contact with them are mainly three: (a) Search engines on

[100] https://nanopdf.com/download/view-open-dukespace-9_pdf
[101] https://www.airbnbcitizen.com/wp-content/uploads/2016/08/MillennialReport.pdf
[102] http://up.hurun.net/Hufiles/201605/20160530111720288.pdf
[103] http://dragontrail.com/chinese-millennials-8-important-marketing-rules-for-outbound-travel/
[104] http://www.xueerxing.com/yingxiaoxue/zhenghe/4863.html
[105] https://www.forbes.com/sites/joeescobedo/2017/05/22/key-opinion-leaders-in-china/#558f1d2372ee

[106] https://www.forbes.com/sites/joeescobedo/2017/05/22/key-opinion-leaders-in-china/#558f1d2372ee

platforms such as *Weibo*'s and *WeChat*'s, which will show a list of accounts based on your search keyword. (b) KOLs search engines that find information on online KOLs databases such as *Robin8*, *Newrank*, *ParkLu* and *Weiboyi.* (c) KOL agencies such as *Louis Communication* and *Gu Shan Wen Hua*. To conclude, the article introduces a series of possible ways in which KOLs can cooperate with organizations; that is, by means of sponsored posts, product reviews, campaign launches on *Weibo* or *WeChat* and so on.

Among the group of the FITs there are the so called ***Backpackers*** (Bèibāokè 背包客), a significant minority of Chinese tourists that are switching from traditional family trips and national and international mainstream locations, to more adventurous destinations, longer and further trips, often by themselves. They are seeking freedom, act in a more independent way and long to enjoy the process of the journey (Karthick, 2013)[107]. In doing so, they rediscover the meaning of life, away from the polluted and overcrowded Chinese cities. «We are seeking a more experiential form of travel and cultural immersion than has traditionally been offered to us» says Hong Mei, «the first Chinese female to backpack across India» (Cottrell, 2014)[108].

Mainstream or Mass Travellers

The group that currently travels the most generally belongs to generations born in the 1950s and 1960s. The rapid expansion of international travel is directly related to the rapidly growing middle class of China, which is composed mainly by entrepreneurs, wealthy white collars and senior people (Xu, 2013)[109]. According to a study by consulting firm McKinsey & Company (2013)[110], 76% of China's urban population will be considered middle class by 2022 as showed in the following bubble chart.

[107] https://www.tnooz.com/article/chinese-travellers-profile-analysis-lens-social-media/
[108] https://www.theguardian.com/travel/2014/oct/11/young-chinese-backpackers-hit-the-road
[109] https://www.theseus.fi/bitstream/handle/10024/62776/Xu_Xiao.pdf?sequence=1
[110] https://www.mckinsey.com/industries/retail/our-insights/mapping-chinas-middle-class

CHINA'S MIDDLE CLASS AS PERCENT OF URBAN HOUSEHOLD

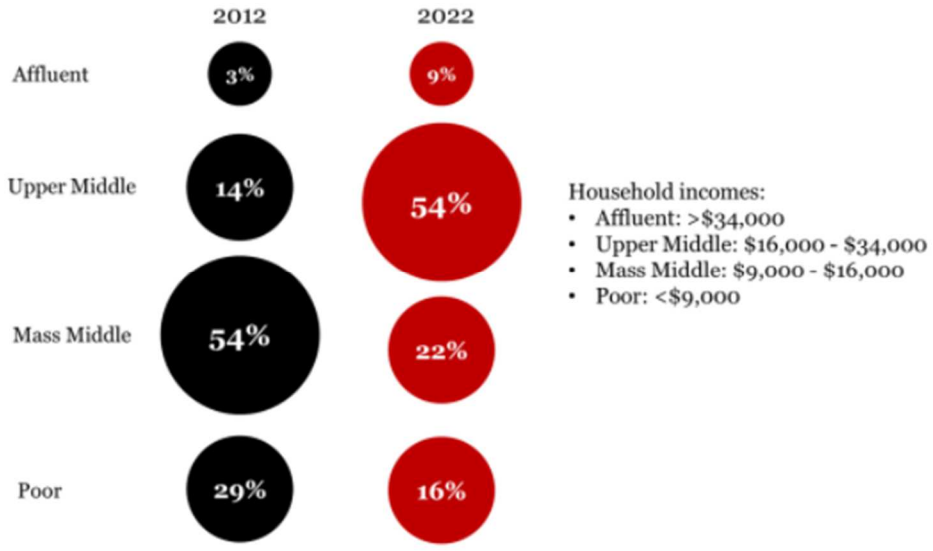

Fig. 2.11. Source: Iskyan, 2016

«Chinese people tend to begin travelling abroad once their household earns about $35,000 and between 2003 and 2013, about 21 million households crossed that threshold […]Another 61 million households are expected to achieve those earnings by 2023», said David Scowsill, CEO of WTTC (Petroff, 2016)[111]. This type of Chinese tourist have the financial possibilities and the willing to travel to the most famous places around the world. They are mostly tourists travelling in groups with the assistance of travel agencies, using the formula of the "**Package Tour**", that means a «complete trip, usually including fare, accommodation, meals, ground transport, tour guides, taxes, etc., in one all-inclusive price» (BusinessDictionary.com)[112]. Many elder people in China do not have any English language skills; therefore, it is easier for them to travel with a tour guide in a foreign country. According to the report issued by *Ministero Affari Esteri (MAE)* and *Agenzia Nazionale del Turismo ENIT,* 2012)[113] Chinese people tend to prefer travelling around Asia, when they do their first trip outside the country, but then they become more adventurous and tend to travel at a greater distance, such as Europe and the United Nations. Travel agencies will schedule the entire itinerary for the group, which saves tourists' time on planning their routes, booking hotels, buying tickets and so on. Actually, they prefer to visit all known places as soon as possible, as a demonstration of their personal status symbol, therefore Chinese people usually do not visit only one destination during their trip to Europe or USA. As far as Europe is concerned, it is a trip often lasting between 10 and 15 days. Post 60s Chinese travellers are increasingly travelling further and choosing much more adventurous styles of travel. Eco tours, backpacking and theme tours are the new must have for this generation, either with

[111] http://money.cnn.com/2016/03/21/news/economy/china-travel-tourism-record-spending/index.html
[112] http://www.businessdictionary.com/definition/package-tour.html
[113] http://www.esteri.it/mae/pdf_paesi/asia/cina.pdf

their millennial children (those born between 1980s and 1990s) or on their own. Although it is usually the first time they travel abroad, they are not inexperienced tourists. They already have a clear idea about the place to visit and, above all, what they want to buy. They gladly eat in Chinese restaurants and expect a decent standard of accommodation. They are deeply anchored to their traditions and habits. It is difficult for them to adapt to local cultures, since they have little general knowledge of the Western world (MAE; ENIT, 2012). In short, this group is what we see most frequently in outbound tourism organized by travel agencies. Families on holiday belong to this group as well; according to Wyman (2017)[114]:

> (they) generally move, dine, stay, and play together as a single unit, so destinations should ideally have something for all family members […] Families are a particularly lucrative segment, as travellers with children tend to spend more than those without, often prioritizing factors such as convenience and child-friendliness over price.

VIP or Luxury Travellers

This group is composed of wealthy generations: they are looking for individually tailored, exotic experiences, from which they can take unique memories and local knowledge back home. They are great fashion lovers and demanding people in terms of quality of service (Hoogewerf; Fang Roe, 2016)[115]. Compared to the group mentioned above, they are much more informed and more willing to adapt to local cultures since they have more information about them. Luxury travellers are not just looking for extravagant accommodation and food. Instead, they hope to get to know local cultures and lifestyles through authentic experiences. On the other hand, however, more attention is paid to services and comfort (Rapp, 2016)[116]. Obviously, they also love shopping, and they travel usually in two or three countries, with a higher awareness. Europe and Southeast Asia are the most popular destinations for Chinese luxury travellers. The reason why these two destinations are so popular with Chinese luxury travellers is due to the rich culture and the possibility to experience different adventures (Ursell, 2107)[117]. In general, Chinese travel agencies propose top-quality trips based on customers' requests. For this reason, this group provides greater margins not only for Tour Operators, but for the different organisations too. This because, even when they are not shopping-oriented, customized tours often have the effect of boosting sales of luxury goods. Fortunately, this trend sees constant growth and tends to be more and more at a top level. According to the *Hurun's Chinese*

[114] http://www.oliverwyman.com/content/dam/oliver-wyman/v2/publications/2017/jul/The_Chinese_Traveler_of_today_and_tomorrow_WEB.pdf
[115] http://up.hurun.net/Hufiles/201605/20160530111720288.pdf
[116] https://jingdaily.com/bespoke-tour-chinas-upscale-adventure/
[117] https://www.dragonsocial.net/blog/the-most-important-chinese-luxury-travel-trends-2017/

Luxury Traveler 2017 report[118], luxury travel agencies are flourishing in China. More than half of high-end travellers said they had already employed customized traveller services (Ruan, 2018)[119]. It is estimated that customized travel services will account for 20 to 30 percent of China's outbound tourism industry in the next five years. The customized travel service is extremely popular among FIT travellers too, even if the majority of them prefer planning their itineraries independently (Pan, 2018)[120].

2.4. Chinese tourists and the digital culture

The way of doing tourism has changed over the years: being a social phenomenon even before an economic one, the sector is influenced by the evolution of travellers' needs and by a series of factors that have combined effects on individual behaviour. According to the report edited by *UniCredit* and *Touring Club Italiano* (2017) [121], technology has profoundly influenced how to look at the world of travel; it has expanded the possibility of finding information, it has revolutionized the traditional concept of intermediation and it has consequently reduced the information asymmetry between producer and consumer, offering the latter the possibility to generate their own contents and to spread them through social tools.

The number of people with access to computers and the Internet is growing worldwide. In many places, the Internet is becoming the new medium for art, culture and commerce. For many, the use of computers and digital media such as blogs, instant messaging and social networks has become a central focus of their daily lives. The generation that grew up with digital media, the so-called "digital natives", show a completely different behaviour patterns, compared to older generations (Z_punkt, TUI AG, 2012)[122]. Now many platforms allow to read or release reviews on a tourist destination or on specific services offered locally. However, there will still be a significant 'digital divide' among regions and areas in the future. This difference will show up, not only in those rural areas that in the future will still be without access to the Net, but also within different societies in nearby areas.

China has arrived in the digital age and is going to become the world's number one online nation. In 2011, more than half a billion Chinese were online, while the number of Internet users increased fivefold from 2000 to 2011 (Z_punkt, TUI AG, 2012). Chinese millennials make up 60% of China's WeChat users, and 66.8% of Weibo users. They research their travel very thoroughly usually online or through social media, before going on holiday. The *2016 Hurun Report on luxury*

[118] http://www.hurun.net/EN/Article/Details?num=5637E45DCB03
[119] https://jingdaily.com/choice-matters-for-chinese-luxury-travelers/
[120] https://jingdaily.com/hurun-customized-travel-service-china-luxury-travelers/
[121] https://www.unicredit.it/content/dam/ucpublic/it/chi-siamo/documents/noieleimprese/UC--TCI-2017-low.pdf
[122] http://sete.gr/_fileuploads/entries/Online%20library/GR/New_Chinese_Tourists_in_Europe_from_2017_en.pdf

travel (Hoogewerf; Fang Roe, 2016)[123] found that 48% of respondents primarily received travel information through *WeChat* subscription accounts, and 42% from websites, with 35% receiving travel information through *WeChat* shares by travel advisers. The survey found that the majority of young Chinese luxury travellers enjoy interactive digital services and say that Wi-Fi connectivity and 3G are very important when travelling, enabling them to stay in touch with relatives and friends, posting online and sharing on *WeChat* Moments. This method both keep customers happy and assure a source of indirect advertising for the touristic destination. According to the *Resonance Consultancy* report (2016)[124], the number of Chinese people using mobile apps to book their travel has more than doubled each year since 2013. Last year, 50 percent of Chinese travellers turned to mobile to book outbound travel. Chinese tourists use their own channels to access travel information. Some of the main platforms and apps used by the Chinese travellers are shown below.

Chinese social media platforms

Among these major platforms, according to the last report of *Kantar* (XU 徐, 2017)[125], we have **WeChat** (Wēixìn 微信) an all-in-one messaging app. It is far more complex than any of the Western messaging app, because it is a mix of *WhatsApp*, *Facebook*, *Instagram* and *Skype*. It also contains ten million third-party apps. The Chinese use *WeChat* app for nearly everything, from restaurant bookings, booking flights, making investments, to shopping, paying bills, hailing taxis, transferring money, posting Moments on their walls, and so on. It is the primary information channel for young travellers, who use this digital platform to obtain travel information from official *WeChat* brand accounts, friends and professional travel advisors. WeChat allows brands to advertise on its platform with banner ad, KOL (Key Opinion Leaders) advertisements, and Moments ads. It has recently made created City Experiences mini programs, aiming at providing more information to the growing market of Millennials (Spark, 2017)[126]. Tourism boards and national tourism organisations collaborated to provide information on their travel destinations, allowing the mini programs to «offer maps via geolocation services, an image gallery, audio guides about each attraction in Chinese and English and even suggest full one to five day itineraries. In later stages of development, the mini programs will enable travellers to book and pay for these experiences without leaving WeChat at all» (Spark, 2017).

[123] http://up.hurun.net/Hufiles/201605/20160530111720288.pdf
[124] https://www.discoverlosangeles.com/sites/default/files/media/B2B/RES-Portrait-Chinese-International-Traveler-5.pdf
[125] http://cn.kantar.com/%E9%A6%96%E9%A1%B5/%E5%AA%92%E4%BD%93%E5%8A%A8%E6%80%81/%E7%A4%BE%E4%BA%A4/2017/2017%E5%B9%B4%E4%B8%AD%E5%9B%BD%E7%A4%BE%E4%BC%9A%E5%8C%96%E5%AA%92%E4%BD%93%E6%A0%BC%E5%B1%80%E6%A6%82%E8%A7%88/
[126] https://jingdaily.com/wechat-moves-into-travel-services-via-mini-programs/

Obviously, it is still quite limited but it is estimated to become more and more popular, allowing users to create their own itinerary with more flexibility.

A second popular platform in China is **Weibo** (微博 Wēibó). It is a very powerful micro-blogging platform for sharing images and content with a wider audience. It is the Chinese equivalent of *Twitter* and it is a good tool to keep you updated with all the news. Weibo's monthly active users grew at a fast pace and, according to its statistics, in 2017 it reached 340 million (China internet watch, 2017)[127]. Chinese people visit Weibo for information, sharing and engaging with other users. Chinese tourists often look for information on these social media platforms before to make decisions about travel.

QQ is another instant messaging app, with 861 million monthly active users in 2017(Linkinfluence, 2016)[128]. It offers users multiple services like games, music, shopping, micro-blogging, movies, group chat, and voice chat. Even if people still prefer using WeChat, there are still very active groups of users that operate inside the app.

RenRen was one of the earliest SNSs (social networking websites), launched in 2005. It originally was a social network for university students, but its user base expanded, making it one of the market leaders. Today, its users are still mainly young people; it is used to share multimedia content like pictures and videos. A few big brands are using RenRen advertising to target the right users. As a matter of fact, in this platform brands can create interactive games as part of a marketing campaign and users participating to the game could earn points used to buy products in store or to obtain discounts (Linkfluence, 2016)[129].

Meipai is the most popular video messaging app in China. It allows users to make 60-second videos, import photos, add effects, and then share their videos directly to Weibo and WeChat. However, it is most popular for the live-streaming function used frequently by the Key Opinion Leaders (Thai, 2017)[130].

Mafengwo is a Chinese travel social networking service website aggregating user-generated content that enables users to share travel experiences with each other (Thai, 2017). The company used the content to create travel guides with advice on attractions, hotels, flights, travel routes, maps, dining recommendations, visas, and insurance. It was launched in late 2010, and has since then acquired over 100 million active users. According to its co-founder and chief executive officer, Chen Gang, it is now retargeting its users, focusing more on the booming travel sector of Millennials.

[127] https://www.chinainternetwatch.com/20636/weibo-q1-2017/
[128] https://linkfluence.com/made-in-china-the-worlds-largest-social-media-landscape/#http://cn-en.kantar.com/media/social/untapped-social-marketing-potential-of-qq-zone/
[129] https://linkfluence.com/made-in-china-the-worlds-largest-social-media-landscape/#http://cn-en.kantar.com/media/social/untapped-social-marketing-potential-of-qq-zone/
[130] https://www.dragonsocial.net/blog/social-media-in-china/

Through this app, the users can scan the latest travel information and reviews, as well as book hotels, travel destinations and local tours. Users can also share information about their trips and post content for other users. «Our platform will generate a huge amount of travel information coming from millions of tourists globally every day» Chen said (Shijia, 2017)[131].

Chinese search engines

Among these search engines, we have **Baidu** (Bǎidù 百度), which is by far the most powerful leader in the Chinese search engine market, with nearly 80% market share and 665 million monthly active users registered in 2017. It is the largest communication platform in China, a keyword-based discussion forum, in which users can search for information through a search bar (Thai, 2017). Baidu offers several services and spin-off products in addition to its search features, among which the possibility to directly download apps and content from its Baidu App Store, Baidu Maps, Baidu Space (its social network), Baidu Wallet (for payment), and so on.

Youku (yōukù 优酷) is the top video sharing app in China; it is a sharing platform equivalent to YouTube. It contains more professional content than individual user generated content. Users can even stream or download movies and TV shows directly on Youku (Thai, 2017).

Online Travel Agencies (OTA)

Ctrip (Xiéchéng lǚxíng wǎng 携程旅行网) is a Chinese provider of travel services, acting primarily under the agent model. It was founded in 1999 and it is one of the biggest online travel agency in China, with a total number of users of 300 million, covering mainly hotel booking, flight ticket booking and travel. «The Ctrip customer is often an independent traveller that is willing to pay higher prices in exchange for a better travel experience» (Wein, 2017)[132]. This is why, with over 10,000 platform partners, Ctrip offers independent leisure travellers packaged tour bundles, in addition to other services.

Qunar (Qù nǎ 去哪) is a Chinese-language online travel information provider and mainland search engine for web-based and mobile users (Hernandez; Bahut; Wang; Garcia, 2015)[133]

LY (Tóng chéng lǚyóu 同程旅游) is a leading Chinese online travel platform that specializes in weekend getaways and local sightseeing tickets. LY's services include booking for flights, hotels,

[131] http://www.chinadaily.com.cn/business/2017-06/29/content_29926924.htm
[132] https://skift.com/2017/07/25/new-research-report-a-deep-dive-into-ctrip-and-the-china-online-travel-market-2017/
[133] https://www.google.com/search?q=EU+SME+centre.+Sector+report.+The+tourism+market+in+china%2C+2015.&ie=utf-8&oe=utf-8&client=firefox-b

trains, attraction tickets and cruises. The company is known mostly for its local attraction ticket service (Hernandez; Bahut; Wang; Garcia, 2015).

Meituan-Dianping (Měituánwǎng 美团网) just became the world's fourth-most valuable start-up, even if it is not well known outside China (Linkfluence, 2016)[134]. It provides a wide range of services, from delivering food to people's homes, selling groceries and movie tickets, reviews of restaurants, and markets discounts to consumers who buy in groups. It can be seen as a sort of mashup of Groupon, Yelp and Uber Eats. Meituan generates most of its revenue from mobile application services. Moreover, the company has partnering agreements with over 400,000 Chinese local businesses. Meituan Dianping has expanded well beyond its original businesses; travel is indeed becoming the latest competitive ground, aiming at becoming one of the biggest travel booking sites (Wikipedia)[135].

Fliggy (Alitrip) (飞猪 feizhu) Alibaba's Alitrip, recently rebranded as Fliggy, has now more than 10,000 merchants on its platform selling aircraft tickets, hotel booking services, tour guide services, visa application services, and travel packages. Since the rebranding in 2014, this platform has mostly targeted the outbound tourism market and *millennials*. It cooperates with European countries in offering Chinese tourists local services in Chinese (Marketing to China, 2016)[136].

Tuniu (途牛 tuniu) offers more than 80,000 tourism products, which include group travel services, independent travel packages, cruises, hotels, visas and so on. It mainly target outbound travellers and millennials. Therefore, it tries to distinguish itself from its bigger and more famous competitors, gaining a place in the market (China Daily, 2016)[137].

[134] https://linkfluence.com/made-in-china-the-worlds-largest-social-media-landscape/#http://cn-en.kantar.com/media/social/untapped-social-marketing-potential-of-qq-zone/
[135] https://en.wikipedia.org/wiki/Meituan-Dianping
[136] https://www.marketingtochina.com/alitrip-becomes-fliggy/
[137] http://www.chinadaily.com.cn/travel/2016-04/14/content_24545053.htm

3. CONTEXT ANALYSIS: CHINESE TOURISM IN ITALY AND IN VENETO

Chinese outbound tourism began to grow impressively only in the 20s, thanks to new opening up policies. According to the *China Outbound Tourism Research Institute* (COTRI, 2017)[138], in the early Nineties there were just 2 million outbound Chinese tourists, at the beginning of the new century nearly 10 million, by 2013 this number increased tenfold and reached 137 million in 2016. Oxford *Economics for InterContinental® Hotels Group* (IHG®)[139] predicts that, by the year 2023, there will be another 61 million families who will be able to afford international travels, thus strengthening China's role as the main market for international tourism. As a matter of fact, China and the US are the major sources of international tourism, yet China is set to become the largest long-haul source market, surpassing the United Kingdom, the United States and Germany in 2020.

Europe is becoming one of the favourite destinations of the emerging Chinese middle class and rich Chinese tourists, notwithstanding what we have seen in the previous chapter, Asian countries are still Chinese tourists' number one choice because of their proximity and lower costs (De Luca, 2017). The new generation of Chinese tourists, the so-called "new rich" that are coming to Italy, want to distinguish themselves and show their status in society (Fasulo, 2016)[140]. As said before, this part of population is bound to increase. In 2016, about 11 million Chinese tourists visited Europe, which is only 1% of the Chinese population Aise, 2017)[141]. It goes without saying that this is a great opportunity for Europe, which should seize the moment.

Hereinafter, I will illustrate the tourism market in Italy and then, more specifically, in Veneto. I wanted to analyze the touristic fluxes to create a clearer contextualization, however the phenomenon of the Chinese tourism in the Veneto region is not much investigated and therefore to find useful information and analyzable data is not an easy task.

3.1. Analysis of touristic fluxes in Italy

The tourism industry represents a significant contribution to the production of the Italian wealth, the development of employment, and the assets of the foreign exchange balance; however, its resources and potential are not fully exploited today. Tourism is an important economic activity, especially for a county that holds the largest number of *UNESCO* sites: at present 53 (Mosca, 2017)[142].

[138] https://ecty2018.org/wp-content/uploads/2017/06/2018-EU-China-Tourism-Year-Webinar.pdf
[139] https://www.ihgplc.com/chinesetravel/src/pdf/IHG_Future_Chinese_Travel.pdf
[140] https://www.ispionline.it/it/pubblicazione/turismo-i-ricchi-cinesi-cercano-lavventura-17905
[141] http://aise.it/anno2017/leuropa-alla-conquista-della-cina-nel-segno-del-turismo/82492/143
[142] https://www.wired.it/play/cultura/2017/07/11/italia-53-siti-unesco/

Perhaps for this reason, the value of the tourism industry for the Italian economy is higher than the world and European average; however, the importance of the tourism industry within the Italian economy is indeed underestimated. Until now, Italy has enjoyed significant revenue without having to invest any particular effort, due to its artistic beauty. However, following the international crisis and the consequent decline in the domestic and European tourist movement, it is essential for Italian economy not only to stimulate flows but also to attract especially those fluxes coming from developing countries (Nardi, 2013/2014)[143].

The data contained in the 2017 Tourism Report, edited by *UniCredit* in collaboration with *Touring Club Italiano* [144], tell us that in 2016, the world tourism, with over 1.2 billion international arrivals, has experienced yet another record year, while the first forecasts for 2017 indicate that flows will continue with a growth trend of between 3% and 4%. This phenomenon is visible especially in Italy, in which Veneto is the most touristic region in terms of arrivals. This result has been reached despite destabilizing factors such as global crisis, terrorism, migratory phenomena and the affirmation of new forms of protectionism.

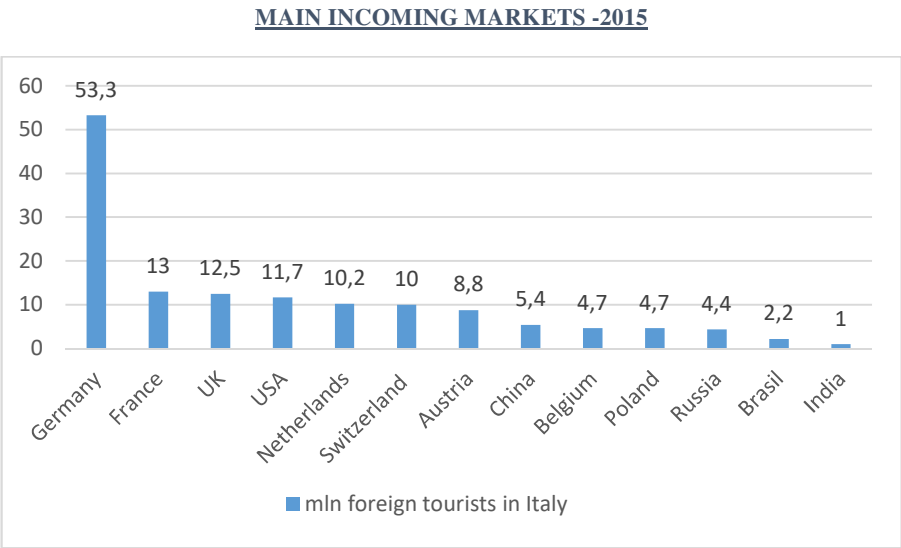

Fig. 3.1. Source: UniCredit; Touring Club, 2017

Due to the lack of infrastructure and transport, our country slipped into twenty-third position in the recent report of the *World Economic Forum* (2017)[145]. However, in the ranking of the *World Tourism Organization* we are fifth for attractiveness; furthermore, domestic tourism is recovering after years of crisis. In 2016, Italian arrivals grew by 6.2%. As for the incoming, in 2016 the tourist spending of foreigners reached another record (36.4 billion euros). As can be seen from the chart

[143] http://dspace.unive.it/bitstream/handle/10579/5573/820923-1176725.pdf?sequence=2
[144] https://www.unicredit.it/content/dam/ucpublic/it/chi-siamo/documents/noieleimprese/UC--TCI-2017-low.pdf
[145] https://www.weforum.org/reports/the-travel-tourism-competitiveness-report-2017

above, Germany was confirmed as the leading reference market (53.3 million), while for the first time China entered the top 10, with 5.4 million entries (UniCredit; Touring Club Italiano, 2017). [146]

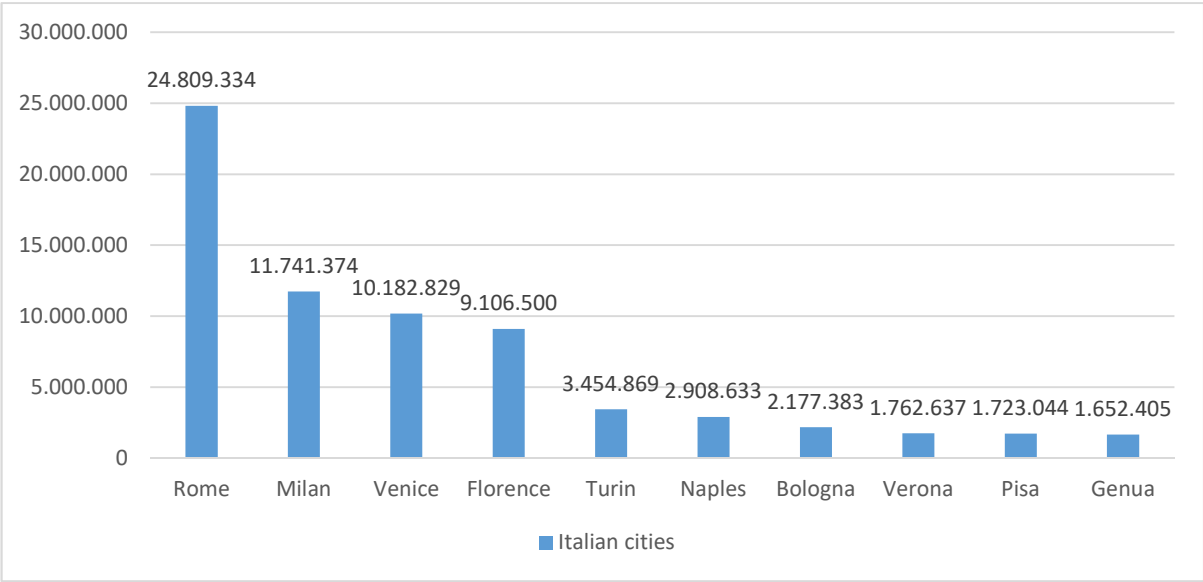

Fig.3.2. Source: UniCredit; Touring Club, 2017

As can be inferred from the chart, Rome, Milan, Venice and Florence are the most visited cultural destinations of our country. According to the data gathered form the 2017 Tourism Report, edited by *UniCredit* and *Touring Club Italiano*[147], Italian cultural tourism is in good health and grows in the medium term and in the short term. On the other face of the coin, however, the report also shows a new phenomenon, the so-called "Over-tourism", which touches destinations such as Venice, where tourism has become a threat to environmental and social sustainability. Actually, the growing attention to the issues of sustainability on the part of tourists, at least for the more mature and aware one, requires a rethinking of the offer. (UniCredit; Touring Club, 2017). However, among the critical issues of our country there is an excessive concentration of travellers in some specific areas and in particular periods of the year. The most visited areas are mainly the art cities of the Center-North, with Rome, Milan and the Adriatic coast of Veneto and Emilia-Romagna. A striking effect of this phenomenon can be seen in the narrow streets ("Calli" in venetian dialect) of Venice, where in the peak seasons, the crowd of tourists is overwhelming and often makes and easy passage nearly impossible, hence bringing out local inhabitants' rage. To try to solve this problems, Venice

[146] https://www.unicredit.it/content/dam/ucpublic/it/chi-siamo/documents/noieleimprese/UC--TCI-2017-low.pdf
[147] https://www.unicredit.it/content/dam/ucpublic/it/chi-siamo/documents/noieleimprese/UC--TCI-2017-low.pdf

Municipality decided to install turnstiles and barriers to regulate tourist flows, even if, according to many, the initiative will be a flop (Ganz, 2018) [148].

Chinese tourism in Italy is a growing phenomenon. Last year, 3.79 million Chinese tourists visited Italy, making it the fourth destination of choice after Germany, the U.S., and France, according to data from *Confturismo* trade association and *ISTAT* official statistics agency (Confturismo-Confcommercio, 2017)[149]. In Italy in 2017, the number of Chinese tourists has been increasing by 15%, compared to the previous year, and it is expected to increase further. This year, the Chinese tourist satisfaction has been better than past years, because countries destination have started to adapt their services to these demanding travellers. Nonetheless, Italy is not yet prepared for the new wave of Chinese travellers that is expected to reach its destinations.

The incoming flows of Chinese tourists mainly concentrate in the North and Centre of Italy and the most visited Italian regions are Veneto, Tuscany, Lombardy and Lazio, which are the most famous in China. The areas of origin of Chinese tourists are mainly the densely populated regions in the Chinese coastal and internal area and the more traditional areas around the locations of the Italian embassies (Beijing) and Italian consulates (Shanghai and Guangzhou) because, in the past, it was easier to obtain visas there (De Luca, 2017). The expenditure of Chinese tourists in Italy is quite interesting, since the proportion of purchases made by Chinese tourists makes up 33% of the total purchases in Italy. Even if, according to recent statistics, shopping is no more on the top of motivations of Chinese tourists to travel abroad, nevertheless it is still relevant in Italy, due to its renowned fashion and craftsmanship brands (Hancock, 2017)[150]. Good evidence of this is the fact that Milan is the city in Italy where Chinese visitors go shopping the most, followed by Rome, Florence and Venice. Moreover, in 2015 the expenditure of Chinese tourists in Italy increased by 56%.

Chinese tourists that travel to Italy are attracted mostly by its artistic and cultural heritage (UNESCO world heritage sites), Italian life style, food and wine, Made in Italy, its mild climate and romantic landscapes, music, opera and cinema and clean air. On the other hand, they criticize the lack of security and the lack of Chinese speaking personnel and of Chinese written information (ETC; ETOA; Eurail Group G.I.E.; TCI Research, 2018)[151]. The more traditional type of tourism is linked to the passion of Chinese tourists for organised tours of well-known Italian historical cities, or of places connected to historical people like Marco Polo, Matteo Ricci Michelangelo and Leonardo,

[148] http://www.ilsole24ore.com/art/impresa-e-territori/2018-04-29/venezia-citta-canali-e-tornelli-095809.shtml?uuid=AElLRKgE
[149] http://www.confcommercio.it/documents/10180/13539871/Il+turismo+italiano+parla+sempre+pi%C3%B9%20straniero/c71a43bf-59ed-4a22-a391-df948336d182
[150] https://www.ft.com/content/f34c4116-710e-11e7-aca6-c6bd07df1a3c
[151] http://www.etc-corporate.org/?page=download-report&report_id=108

which are famous in China too (Wang, 2016)[152]. However, as seen in the previous chapter, other types of tourism are now emerging. Today, the main categories of Chinese tourists are businessmen, families with children, couples, senior tourists, and the young and students. The majority of them have a high level of education and a medium-high income. Therefore, some of these categories have now the economic possibilities and the mental openness to try alternative types of tourism (Gavinelli, 2017). However, Italian public and private tourism organisations still struggle in approaching this market, mostly because of cultural and linguistic barriers, lack of knowledge and fragmentation of the touristic offer. Tourism organisations should create a strong network to cover all the national area and create a continuous and unitary promotion to reach wider areas in China.

Shown below are the four elements composing the SWAT model of the Italian reception toward Chinese tourists, according to "Ministero Affari Esteri -MAE, Agenzia Nazionale del Turismo -ENIT" (2016)[153].

Strengths

1. Identification with a highly level lifestyle, able to give personal gratification.
2. Historical, artistic and cultural richness.
3. Distribution of artistic and environmental heritage throughout the national territory (UNESCO sites)
4. Aesthetic quality of handicraft and mass production, especially in the fashion industry, which still acts as a stimulus for shopping trips (many famous Italian brands are known all over the world).
5. Gastronomic and oenological high quality and traditions.
6. Typically Italian attitude of curiosity, availability and openness to the foreign visitor.
7. Competitive and high quality receptive facilities in tourism destinations, towns and country villas.
8. Italian historical hamlets.

Weaknesses

1. Insufficiency of promotional investments for the dissemination of the brand "Italy".
2. Absence of written information in Chinese and insufficient dissemination on the Internet of tourist information in Chinese. Furthermore, insufficient knowledge of the English language.
3. Limited number of travel agents that operate on Italian destinations, none of which is specialized on specific destinations within the country.

[152] http://www.chinadaily.com.cn/world/2016-09/05/content_26775432.htm
[153] http://www.esteri.it/mae/pdf_paesi/asia/cina.pdf

4. Insufficiency of direct air links with Italy (for mainland China) and main services in Italy. There is a limited number of direct flight connections between Italy and China, mostly managed by the Chinese airlines (Air China and China Eastern).
5. Scarce promotion of the Italian offer according to the needs of the average Chinese tourist.
6. Slowness and complexity of Italian consular bureaucracy that creates problems in getting visa, with the risk of becoming a stressful and discouraging step. This is an incentive to choose non-Italian airports to access Europe and therefore to spend less time in Italy. An important element for the Chinese tourists in choosing the holiday destination is the ease with which they can get the entry visa. For this reason, several nations are speeding up the bureaucratic visa issuance and are favouring the issue of long-standing multiple entry visas.
7. Perception of lack of security due to micro-criminal risks.

Opportunities (the strategic priorities for the attractiveness of the Free Independent Traveller -FIT-):
1. Alternative routes. Focus on high-value "niche" tourism that responds adequately to the new needs of international tourism and strengthens the brand "Italy".
2. Promotion of active and adventure holidays, "shopping" holidays, eno-gastronomic itineraries.
4. Promotion of the South, especially of Sicily and Sardinia, and of the North, since the new interest of the Chinese wealthier class in winter sport tourisms. The Chinese Government for example, has indeed started to actively promote winter sports such as skiing, in view of the Beijing Winter Olympics in 2022 (COTRI, 2017)[154].
6. Promotion of the knowledge of Italians touristic destinations toward the Chinese tourist.

Threats:
1. Maintaining the current dynamics of domestic prices in Italy.
2. Maintaining the current scarce number of direct air connections compared to other European destinations.
3. Shortcomings in the use of technology leverage in tourism promotion, especially in order to reach FIT consumers. Deficiency in the use of offering Chinese tourists direct purchase channels in Italy.
4. Reduction of public funding for the sector, hindering the management of a market that is becoming increasingly competitive and complex.

[154] http://china-outbound.com/2017/01/11/ski-tourism-gains-popularity-ahead-of-beijing-2022-winter-olympics/

Considering the analysis of the SWAT model, we can conclude that the Chinese market is and will be an invaluable resource for the Italian tourism industry, even if its value is not yet perceived by the Italian tourism organisations. China is the most dynamic country among the BRICs for outbound tourism; its spending on accommodation, food and beverages and entertainment is increasing. Italian tourism industry should take advantage from the Chinese tourists' interest in Italian historical and cultural heritage, art and gastronomy and so on. Italian tourism organisations should improve their knowledge about the tourist needs, therefore boosting marketing and services targeted to the tourist. Moreover, the Italian tourism industry should create a common strategy at national and regional levels, to overcome the strong competition from other Mediterranean countries and to try to solve traditional Italian issues such as: high cost of life, strong bureaucracy and high taxation that does not facilitate business tourism, scarce use of online payment methods, weak services offer (as transportation) in certain areas of Italy .

In order to achieve the goal of promoting a tourist and cultural offer, aimed at the best hospitality and travel experience for Chinese tourists, The *Welcome Chinese Certification* has been issued. The certification has been supported by the *China Tourism Academy*, the *China National Tourism Administration* (CNTA) responsible for the development of Chinese outbound tourism, in cooperation with *China Central Television* (CCTV), the national television network, and *China Union Pay*. The *Welcome Chinese Certification* is dedicated to the hospitality of the Chinese tourists and it is an exclusive standard that allows incoming tourism facilities to access a recognized network, allowing to target the vast market of Chinese visitors standing out from the competition with specific requirements. Those who own it have a special visibility, a genuine guarantee brand recognized by Chinese tour operators and institutional entities responsible for managing outbound tourism from China (Bologna Today, 2017)[155]. This certification will then become the European model to be inspired by for the implementation of the strategic plan that will be outlined among the various European countries in the development of relations with China. The quality certification for Chinese tourists has been granted to 500 companies worldwide, 321 in Europe and even 114 in Italy (Bologna Today, 2017).

As seen previously in this dissertation, rich Chinese tourists are looking for new destinations and new type of experiences to distinguish themselves. The **Alps** have become the new destination for wealthy Chinese tourists. Until recently, skiing, climbing peaks and hiking were not part of the

[155] http://www.bolognatoday.it/economia/bologna-cina-merola-welcome-chinese.html

habits of Chinese travellers; however, after winning the bid to host the 2022 Winter Olympic Games in Beijing, the Chinese government have pushed for greater participation in winter sports across China (Hornby, 2017)[156]. Many mountain tourist destinations across the world, from Switzerland to Canada, started to adapt to this new demand. According to *COTRI* 2017's analysis[157], despite criticisms, «China is determined to put itself on the map when it comes to winter sports, funnelling efforts into encouraging Chinese youth to take up skiing, skating and hockey». In 2011, 3 million skiers were estimated in China, which could reach 7 million in 2020. The data is amazing if you only think about the fact that China has no tradition related to skiing. The first ski resorts appeared in China (in the north east of the country) in the 80s, and were essentially made for athletes (Krichko, 2017)[158]. Today, it is estimated that there are 350 stations in China, but these ski resorts are often not adequately equipped. According to the *Financial Times* (Hornby, 2017)[159], president Xi Jinping is now adding his authority to China's step into skiing, leading efforts to create a domestic ski industry almost from scratch, to ensure that the billions invested in the games do not end up in a failure. Actually, from 1996 to 2016, China has quietly gone from just 6 ski areas to 568. Despite having only one gold medal in all Winter Olympics competition history, and being the first host city to rely solely on man-made snow, Beijing 2022 promised to transform China into a winter powerhouse nearly overnight. From the article written by Krichko (2017)[160], it is possible to look at this new Chinese fashion from the point of view of Shan Zhaojian, a 78-year-old former Nordic ski champion and national ski historian.

> In China, a country that once preached, "the shot hits the bird that sticks its head out," skiing has become a celebration of the individual. For the Chinese skier, the mountains are a chance to live healthier and escape the overbearing stress and monotony of city life. Skiing is no longer just a point of pride for this generation--it is a point of identity.

Chongli, will be the future site of the 2022 Olympic ski and snowboard events, however, it was once one of the poorest districts in the country; in little more than 10 years, the government has transformed the region by constructing five ski resorts, a hustling urban area, and over 20 hotels, all within 150 miles of Beijing (Krichko, 2017).

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[156] https://www.ft.com/content/0b1923fe-ffef-11e6-96f8-3700c5664d30
[157] http://china-outbound.com/2017/01/11/ski-tourism-gains-popularity-ahead-of-beijing-2022-winter-olympics/
[158] https://www.powder.com/stories/awakening/
[159] https://www.ft.com/content/0b1923fe-ffef-11e6-96f8-3700c5664d30
[160] https://www.powder.com/stories/awakening/

3.2. Tourism in the region of Veneto

With the approval of the new *Tourism Strategic Plan* "PST 2017-2022 - Italia Paese per Viaggiatori" (MiBACT)[161], the region aims to support and reinforce emerging destinations -- in particular, cities of art, villages, parks, mountains, protected and rural areas -- in which tourism products based on responsible use, on strengthening the elements of sustainability of tourism and on innovation can be built or improved.

> In these areas, a highly integrated tourism development is promoted with the enhancement of other territorial resources, for example, agriculture and the material culture of the places […]. The Strategic Tourism Plan, PST 2017-2022 - Italia Paese per Viaggiatori aims to provide the tourism and cultural Italy with a unified vision, placing the tourism sector at the centre of the country's development policies (U.O. Sistema Statistico Regionale, 2017)[162].

By the way, the *Tourism Strategic Plan* vision proposes to relaunch Italy's leadership in the tourism market and increase the contribution of tourism to the economic, social and sustainable well-being of its territories, expanding its offer compared to its vast potential through the creative proposal of new models and initiatives of valorisation. Veneto region is indeed appreciated by the tourists for the variety of tourist offer and for the culture of hospitality that characterizes it.

In the overall picture of an international tourism market, dynamic and rich in opportunities but in a profound transformation, Italy, as mentioned previously in this chapter, still has to commit to fill some competitiveness deficits. As a matter of facts, territorial destinations with high potential, but still not recognized as tourist destinations worldwide, can benefit from a greater distribution of visitor flow, in connection with the most successful destinations such as Venice or Verona. The excellent results obtained in 2016 by Veneto's tourism reflect the growing interest both of Italian customers and of the foreign market. According to the data collected by the statistic report of the Veneto Region, the growth of international tourism had only been slowed down at the beginning of the global economic crisis, but, nowadays, many tourists prove to be extremely interested in this area.

The president of the region of Veneto, Zaia, said that the Chinese tourism is rising every year of about 11-12%, therefore it is a great occasion that Veneto should take to boost the tourism income. Veneto has an unusual fortuitous characteristic: it has a many-sided offer, hence it is able to propose a total package to attract Chinese tourists and satisfy all their needs (ANSA, 2018)[163]. As a proof of this fact, the data issued by the Veneto region and U.O. Sistema Statistico Regionale show us that Chinese arrivals and presences in Veneto for the 2017 year are striking. They are respectively 741.803

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[161] http://www.turismo.beniculturali.it/wp-content/uploads/2017/07/Piano-Strategico-del-Turismo_2017_IT.pdf
[162] http://statistica.regione.veneto.it/Pubblicazioni/RapportoStatistico2017/pdf/sintesi.pdf
[163] http://www.ansa.it/veneto/notizie/2018/01/19/turismo-ue-cina-zaia-in-veneto-11-12_c9d24140-3267-43d0-873c-87aa4d9bee08.html

and 977.127[164]. More in detail, the data (U.O. Sistema Statistico Regionale)[165] show the higher preference of Chinese tourists for historical and artistic cities (693.707 arrivals, 911.109 presences), however taking a bath in Spas, relaxing at the lake or going to the seaside are becoming increasingly popular activities.

TOURISTS MOVEMENT IN THE VENETO REGION

ANNUAL NUMBERS

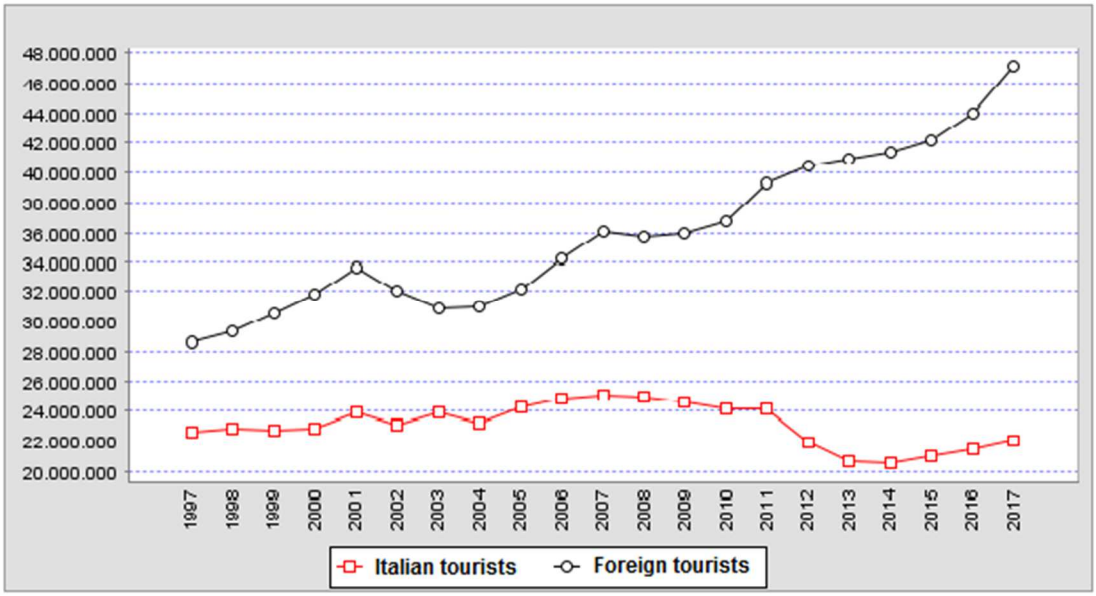

Fig. 3.3. Source: U.O. Sistema Statistico Regionale

[164]http://statistica.regione.veneto.it/jsp/turi2.jsp?D0=2017&D1=REGIONE+VENETO&D3=Turisti+stranieri+per+paese+di+provenienza&B1=Visualizza

[165]http://statistica.regione.veneto.it/jsp/turi2.jsp?D0=2017&D1=REGIONE+VENETO&D3=Turisti+stranieri+per+paese+di+provenienza+e+comprensorio&B1=Visualizza

TOURISTS MOVEMENT IN THE VENETO REGION

ANNUAL ARRIVALS AND STAY: ORIGIN: CHINA.

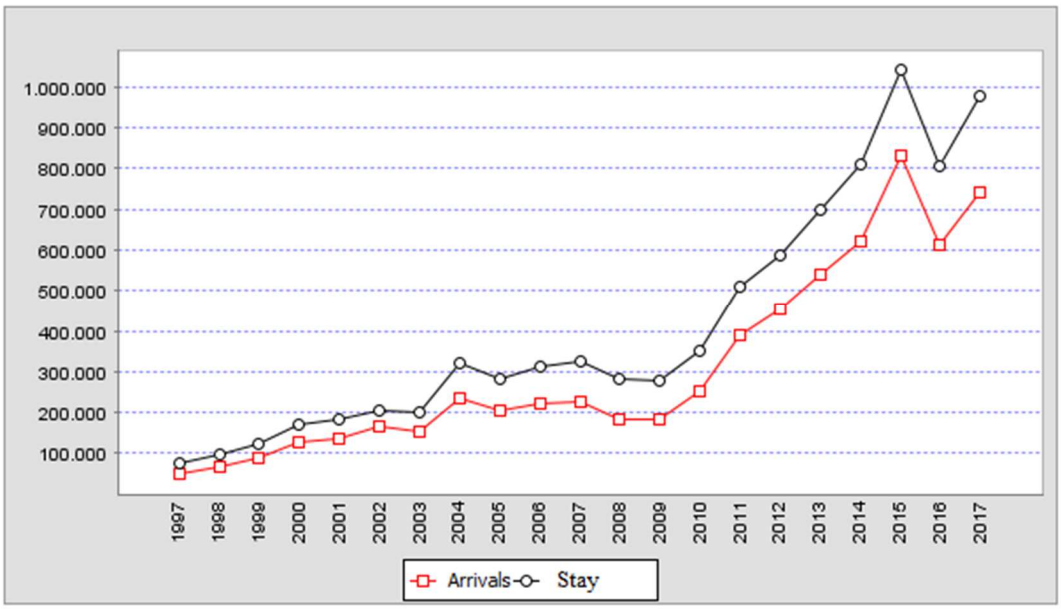

Fig. 3.4. Source: U.O. Sistema Statistico Regionale

TOURISTS MOVEMENT IN THE VENETO REGION

MONTHLY TOURIST NUMBERS IN VENETO: ORIGIN: CHINA.

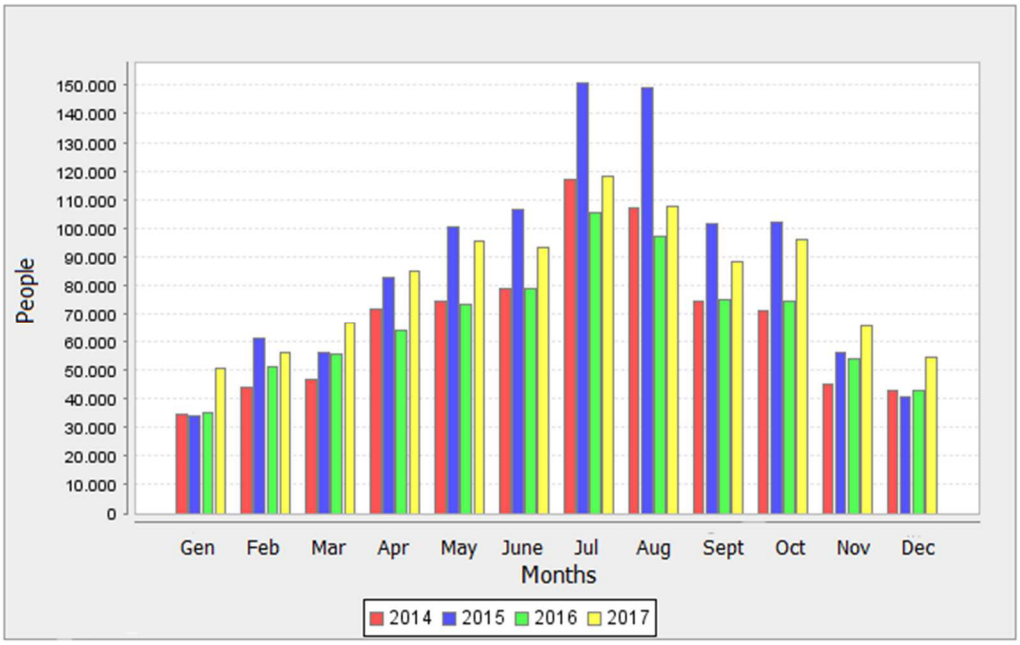

Fig 3.5. Source: U.O. Sistema Statistico Regionale

As can be inferred from these three charts about the tourist movement in Veneto, foreign tourists in this Italian region are the majority, if compared to Italian ones. The number of local tourists remains stable; on the contrary, the number of foreign tourists is increasing. However, it can be seen too that the presence of Chinese tourists is rising gradually, with a peak of presences during summer

seasons, maybe because of the better climate and the always more widespread fashion of going abroad during summer, as the Western tourists do. From 2000s, the Chinese tourism has started spreading, thanks to the new opening up policies, which cleared the way for the outbound travel to the Chinese middle class, and not only to businessmen and very rich people (COTRI, 2017)[166]. Looking at the chart, the years 2015 and 2016 can be considered the starting points of the Chinese mass tourism toward Veneto. In the following charts, we can observe all the numbers of foreign tourists staying in Veneto and, more specifically, which overnight facilities they used and in which areas they stayed (seaside, city, lake, mountain, Spa facilities). As we can see, the numbers of foreign tourists spending their holidays in Veneto in one year is quite impressive. However, we do not have specific percentages of the origin of the tourists; therefore, we do not have a clear idea of the facility preference of the Chinese tourists. Their preference for the type of facility can however be inferred later in the following chapter, thanks to the survey we delivered to Chinese people and Chinese tourists, surveyed in Venice and on the Net.

TOURISTS MOVEMENT IN THE VENETO REGION

ANNUAL NUMBERS ACCORDING TO TOURISM FACILITIES AND AREAS.

	SEA		ARTISTIC CITIES		LAKE		MOUNTAIN		THERMAL BATHS	
	Arrivi	Presenze	Arrivi	Presenze	Arrivi	Presenze	Arrivi	Presenze	Arrivi	Presenze
Hotels 5 and 4 stars	587.089	2.397.541	4.998.930	9.302.276	540.775	1.798.444	179.367	603.231	566.679	2.059.516
Hotels 3 stars and residences	1.161.821	4.632.850	2.590.051	5.134.984	576.685	2.102.092	409.946	1.331.697	221.857	972.923
Hotels 2 and 1 stars	151.611	595.097	473.815	1.116.861	202.704	685.107	92.011	289.262	13.668	55.648
TOTAL OF HOTELS	**1.900.521**	**7.625.488**	**8.062.796**	**15.554.121**	**1.320.164**	**4.585.643**	**681.324**	**2.224.190**	**802.204**	**3.088.087**
Campings and tourist resorts	1.396.146	11.242.607	239.770	758.841	992.305	6.583.571	89.960	442.249	9.472	30.990
Agro-tourism resorts	14.904	58.434	220.638	620.536	54.076	203.698	14.190	43.329	1.938	6.030
Private accomodations	715.159	6.450.880	1.302.212	4.094.470	301.409	1.492.811	113.899	772.895	5.561	40.472
Other facilities	89.251	463.975	596.736	1.866.801	51.978	141.327	189.662	778.316	6.301	14.321
TOTAL OF COMPLEMENTARIES	**2.215.460**	**18.215.896**	**2.359.356**	**7.340.648**	**1.399.768**	**8.421.407**	**407.711**	**2.036.789**	**23.272**	**91.813**
TOTAL	**4.115.981**	**25.841.384**	**10.422.152**	**22.894.769**	**2.719.932**	**13.007.050**	**1.089.035**	**4.260.979**	**825.476**	**3.179.900**

***Fig. 3.6**. Source: U.O. Sistema Statistico Regionale, Elaborazioni Regione Veneto, Ufficio di Statistica su dati Istat - Regione Veneto*

During the opening of the *Eu-China Tourism Year*, Dai Bin, president of *China Tourism Association*, confirmed that nowadays there are 600 thousand Chinese people who visit the Veneto Region every year especially for tourist reasons, and 100 thousand passengers who use Marco Polo Airport to reach or leave China (LaVocedelNordEst, 2018)[167]. Therefore the actions undertook to boost tourism seem to be useful and the hope is that the new *Eu-China Tourism Year* programs will bring more benefits implementing ways to ensure growth flows. The Eu-China program will focus on the specificity of the demand and on the behaviour patterns of Chinese visitors. It is clear that the incoming tourism from China is a fundamental strategic asset; actually, China is the nation that spends more on international travel. The annual spending of Chinese tourism across borders (120 million

[166] https://ecty2018.org/wp-content/uploads/2017/06/2018-EU-China-Tourism-Year-Webinar.pdf
[167] http://www.lavocedelnordest.eu/nordest-vola-turismo-italia-cina-129-milioni-turisti-cinesi-nel-mondo/

tourists) exceeds 200 billion dollars. Through the promotion plan launched in Beijing, Europe and Venice are trying to reposition they self to become the best global destination for Chinese tourists (Italia a Tavola, 2017)[168].

[168] http://www.italiaatavola.net/turismo/tendenze-e-servizi/2017/3/1/europa-cina-2018-anno-turismo-venezia-meta-inaugurale/49025

4. EMPIRICAL FINDINGS: CASE STUDY

Airports are an important opportunity for a city to shape visitors' impressions. It is an inevitable touch point, a gateway moment that gives regions and cities a strategic opportunity to influence every traveller passing through, since it offers the first opportunity to contact tourists. Once they arrive at the airport, it is important to encourage a warm welcome and the possibility to reach all the services, since most Chinese tourists do not have adequate knowledge of English.

The majority of tourists from China move to Europe and Italy through plane. Some of the airplane companies with scheduled flights, that increased substantially their services and the number of flights to Rome and Milan, are, for example, *Air China, China Eastern, Hainan Airlines, China Southern* and *Alitalia* (Assaeroporti, 2017)[169]. Furthermore, conscious of the new needs of travellers, airlines are recently trying to diversify the destination cities in Italy with direct flights. In the following table, issued by *ENAC* (Ente Nazionale per l'Aviazione Civile) it is possible to see the quantity of passengers passing through the two main Italian airports with direct flight and the major Chinese airports with direct flight to Italy. (Sapia; Di Agostino, 2016)[170].

THE MOST USED AIRPORTS BY CHINESE TOURISTS: TRAFFIC TO / FROM ITALY

International Commercial Passengers - Asia and Oceania. (arrivals + departures) year 2016 → 706.101		
From	**to**	**Passengers**
Roma Fiumicino	Beijing Capital (China)	184.865
Roma Fiumicino	Shangai Phudong (China)	95.171
Roma Fiumicino	Hong Kong International (Hong Kong)	151.908
Roma Fiumicino	Xi An Xianyang (China)	53.275
Milano Malpensa	Beijing Capital (China)	96.619
Milano Malpensa	Shangai Phudong (China)	129.703
Milano Malpensa	Hong Kong International (Hong Kong)	170.536

Fig. 4.1. Source: Sapia; Di Agostino, 2016

In this chapter, I will go through the analysis of the case study I used to support the main points of my dissertation, that is to say: (a) How the destination perception of Chinese tourists is different from the western one. (b) Which the behaviours and needs of Chinese tourists are. (c) Which activities and projects the tourism industries can perform, in order to attract and retain the Chinese tourists. The

[169] http://www.assaeroporti.com/wp-content/uploads/2_Note_Traffico_Consuntivo_2017_ADP_ADR_SACBO_BOLOGNA_SOGAER_SAC_GENOVA_GESAC_GEASAR_GESAP_SAGAT_TOSCANA-AEROPORTI_SAVE.pdf

[170] http://www.enac.gov.it/La_Comunicazione/Pubblicazioni/info-1512426776.html

case study is based on the investigation on the "Destination Personality" of *Venice Marco Polo Airport* and the city of Venice from the viewpoint of the Chinese tourists.

4.1.SAVE S.p.a. group

SAVE S.p.A. Group has been managing the *Venice Marco Polo and Treviso Airports* since 1987. It is mostly owned by public companies and the rest by private ones. In recent years, SAVE has taken the form of a modern group operating in the field of travelers' services, organizing its activity in four main business areas: aviation, engineering, parking, food & beverage and retail activities. The development of the various business activities contributes to making *SAVE* one of the most important players in the airport services market at an international level. In particular, it is the first Italian airport management company that manages, through the subsidiary companies, the commercial, catering and duty free activities inside the airport. The possibility to control every aspect of the airport services will be helpful to make all-round changes in the airport able to satisfy the Chinese tourists. At the moment, the airport has already undertook some steps toward these changes as for example information boards and signage.

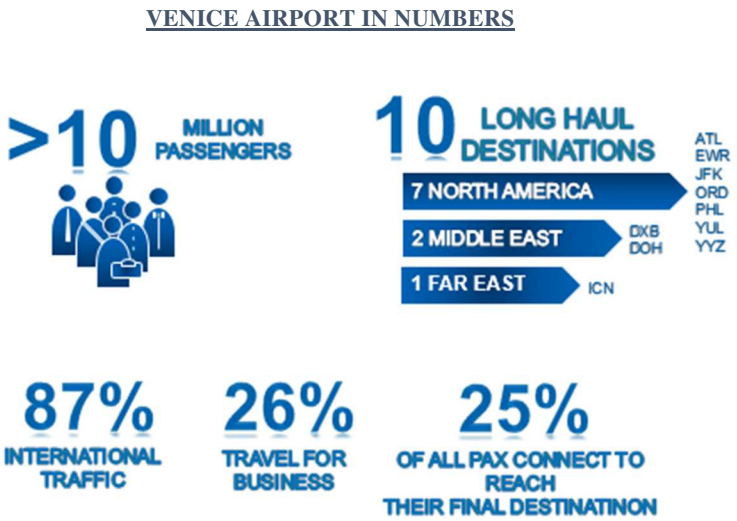

Fig. 4.2. Source: Venice Airport Analysis, Commercial & Mktg Aviation Department, 2018.

In the above figure, there are some data and percentages produced by the Venice Airport Analysis and SAVE commercial & Mktg Aviation Department (2018). We can see clearly that its touristic fluxes are remarkable. As a matter of fact, compared to the bigger national and international airports, Marco Polo Airport is indeed of a smaller size - even if SAVE Group intends to enlarge it in order to create a bigger net of chart flights all over Europe and the main destinations in the world. The data

provided by *Associazione Italiana Gestori Aeroporti* (Assaeroporti 2017)[171], show us that, even if small, the Venice Marco Polo Airport is still important as for the number of passengers. In 2017, 10.371.380 passengers have been registered; an increase of 7.8% compared to the previous year. The Venice-Treviso Airport system, instead, closed 2017 with 13,386,437 passengers, an increase of 9.2% compared to 2016. To conclude, The North East Airport pole, which include the airports of Venice, Treviso, Verona and Brescia, recorded a total of 16.485.579 passengers in the 2017 year.

Venice is a must-see destination from all over the world, which attracts huge tourism flows year-round. The 2018 year, represents an important year for the connections with the Far East: from next summer season, *Asiana Airlines* will activate a scheduled flight between Venice and Seoul. Despite the developing traffic flows mainly to China, South Korea and Japan, nowadays there are no scheduled flights between Far East Asia and Venice for the Marco Polo Airport, as can be inferred by the figure below. Nevertheless, the Group is trying to develop a tighter connection with Chinese airlines; an intention that is furthermore reinforced by the results of the survey carried on by *B-sm@rk Ltd.*

THE VCE MEDIUM &LONG HAUL NETWORK ACCOUNT FOR 10% OF TOTAL TRAFFIC

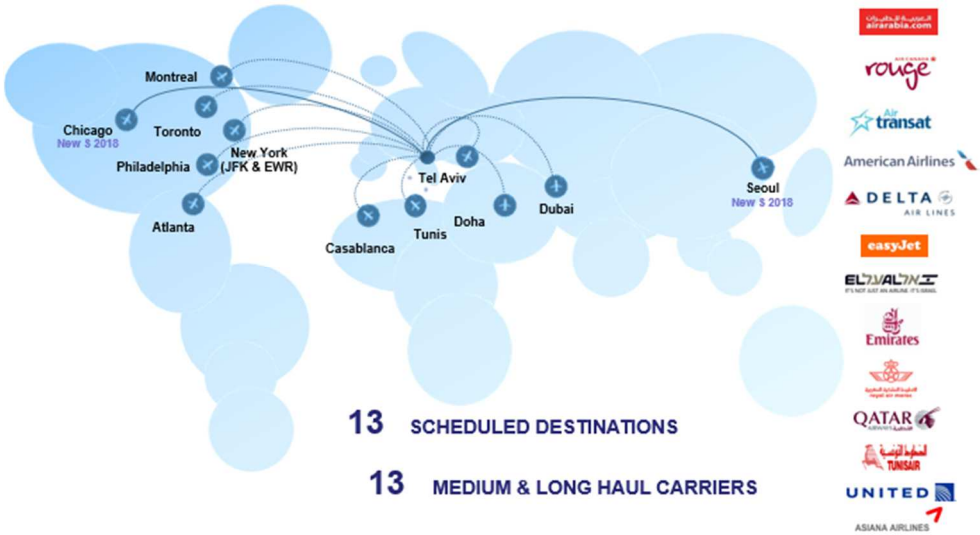

Fig. 4.3. *Source: Venice Airport Analysis, Commercial & Mktg Aviation Department, 2018.*

Besides, according to the data provided by *SAVE S.p.A.* (Gruppo SAVE, 2017) in July 2017 455,000 O&D (Origin and Destination) passengers have been registered between Venice and the Far East/South East Asia. The traffic has developed to a pace of 15% Compound Annual Growth Rate

[171] http://www.assaeroporti.com/wp-content/uploads/2_Note_Traffico_Consuntivo_2017_ADP_ADR_SACBO_BOLOGNA_SOGAER_SAC_GENOVA_GESAC_GEASAR_GESAP_SAGAT_TOSCANA-AEROPORTI_SAVE.pdf

over the last six years (CAGR that is Compound Annual Growth Rate, that is, the mean annual growth rate of an investment over a specified period of time, longer than one year). The tourists are composed by a variegated mix of pleasure, business and ethnic tourists. Moreover, along with the latest information, China is the largest unserved Asian market from Venice, with over 125,000 O&D passengers (Gruppo SAVE, 2017); this is why the possibility of a direct flight to China is more and more desirable. Currently, passengers to China fly mainly via Doha, Amsterdam, Frankfurt and Paris, rather than connecting directly through Rome or other airports in Italy (as *Milan–Malpensa Airport*). As a matter of fact, passengers prefer deploy the wide choice of indirect travel solutions from Venice instead of going to further airports (Gruppo SAVE, 2017).

In line with the worldwide goal of promoting a tourist and cultural offer to welcome Chinese tourists, the *Marco Polo Venezia Airport* has obtained the "**Welcome Chinese Certification**". The Certificate has been issued in Beijing by the *China Tourism Academy* (CTA), at the presence of Li Zhongguang, vicepresident of the CTA (Gruppo SAVE; Welcome Group, 2017)[172]. The Certification is important since it allows the holders of the Certification to enter in the Chinese market directly thanks to the support of the CTA, the *China National Tourism Administration* (CNTA), in collaboration with the *China Central Television* (CCTV) and *China Union Pay.* SAVE has already created an internal signage in Chinese language, and equipped the restaurants with digital menus in Chinese language; moreover, there is the possibility to pay with *Union Pay* card at the shops inside the terminal. Finally yet importantly from the point of view of Chinese people, in the restaurants and in the food services points clients can access hot water, used mostly to drink and eat instant noodles. Chinese people love drinking hot water since in traditional Chinese medicine it is said that cold water damages the energy of the spleen and stomach; on the contrary, hot water is believed to be medical-like. To conclude, *Venice Marco Polo Airport* is well embedded in the region of Veneto, therefore it is interested in expanding its connections. As a matter of fact, the Airport is not the only institution or company doing business with tourism that is interested in managing Chinese tourists (Gruppo SAVE; Welcome Group, 2017).

4.2. The survey

The report written by *B-sm@rk Ltd.* focuses on the research of the perception that Chinese tourists have of *Venice Marco Polo Airport* and the city of Venice. The analysis of the data will help *Venice Marco Polo Airport* to cope with the new flow of Chinese tourism and the necessity to satisfy their needs in the best way to make them feel at ease. The report was delivered to *SAVE Group S.p.A.*

[172] http://www.grupposave.it/upload/comunicati/1512050928/comunicato_stampa.pdf

and presented to the "2018 Eu-China Tourism Year (ECTY)", hosted in Venice during the month of January. As stated previously, the report is based on the data retrieved from the survey I started with a group of interns and external collaborators during my internship period at *B-sm@rk Ltd.* and later modified, according to the client's requests and the issues of that moment. It was formulated following careful research on literature, internet sources, books and webinars. Moreover, it has been set up on the requests of the client and the previous experiences and theories figured out by *B-sm@rk Ltd.* (related to the indexes of Brand and Destination Personality and its expertise on emotion perception).

The survey can be divided into three main parts:

a. The first section examines Chinese tourists travel behaviour: motivations of their visit, preferred tourist experiences, accommodation used, duration of their stay, who they travelled with, preferred European and Italian destinations, their opinion about a possible direct flight from China to Venice, the airlines and airports used.

b. The second section estimates the appreciation of Chinese people of the services offered in the airport and the importance that each of these services has from their point of view. Afterwards, the survey focused on Chinese tourists' perception of Venice, which is summarized through the measurement of the parameters of the Destination Personality and Brand Personality model, as previously explained in this dissertation. In addition to that, other important measurements are of the emotional feedback of the tourists, the intention to promote Venice, the degree of identification with the city, the degree of satisfaction and intention to revisit Venice. These questions are aimed to understand the appreciation of the Chinese tourists of the city of Venice and to understand which elements have to be improved.

c. The third section examines the characteristics of the Chinese tourists interviewed: their age, gender, employment status, education, residence status and personality.

4.2.1. Analysis of the survey

As it can be inferred from the following chart, the survey was spread online and offline on a multi-channel way; that is to say, through web crowdsourcing platforms, social media platforms and face-to-face interviews. As for web crowdsourcing platforms, it was decided to use a crowdsourcing platform called *Witmart* (a platform where you can get in contact with freelancers from all over the world and perform various jobs). *Witmart* was chosen only after having carried out some research and tests on other platforms, which were discarded because not efficient. The test phase was carried out carefully, to be certain of the reliability of the users, to be sure that their responses were not

falsified and were in line with other replies obtained from face-to-face interviews. As for the social media channel, the campaign was carried out by a Chinese co-worker mainly via *WeChat* and other Chinese social media, and in a smaller part on *Facebook*. We spread the survey through our user profiles, in Universities Facebook pages and so on. On the other hand, the offline method used was the face-to-face assisted interview. According to this method, the interviewer handed out the surveys explaining the project to the Chinese tourists, thanks to the use of a tablet or other devices. As a reward, the tourists received coupons and discounts given by various partners collaborating with *B-sm@rk Ltd.* The interviewer approached the Chinese tourists and Chinese study-abroad-students in public places of Venice, as for example, San Marco Square, Santa Lucia train station, Accademia, Rialto Bridge, Zattere and so on. Likewise, the interview was executed in the *Venice Marco Polo Airport*, which is located in the mainland of Venice.

FREQUENCY TABLE. TOUCHPOINTS USED TO COLLECT DATA

	Frequency	%
Crowdsourcing platform	91	3.22
Onsite Venice	367	13
Partner China	323	11.44
Social	2043	72.34
TOT	***2824***	***100***

• **Crowdsourcing platform**: data collected through Chinese Crowd-sourcing platform.

• **Onsite Venice:** respondents were recruited in Venice by interviewers and survey completed in assisted mode.

• **Partner China:** data collected online through Chinese local partners.

• **Social**: we used the WeChat and others social network to engage Chinese people who completed a web survey.

Fig. 4.4. Source: Patt, 2018

Analysing the report, I will try to infer all the insights useful to develop later in the last chapter, a marketing strategy with some suggestions for the tourism industries. The most important elements of the report and of the survey are, on the one hand, the opinion of the Chinese audience about the possibility to establish a direct flight between Venice and China and their opinion about the services provided to them at the airport. On the other hand, the survey collects information about the image that Chinese tourists have of Europe and Venice as tourist destinations, starting from the motivations that encourage Chinese people to travel to Europe, towards their preferred experiences in these destinations and their feedback on their travel experience (Patt*, 2018*).

First of all, the respondents were asked: “Have you been to Europe before?”. This question was necessary to select two different branches of the survey containing specific questions for the following groups: the group who answered “Yes” was identified as “Visited EU”; instead, the group who answered “No” was identified as “Not visited EU”. As reported in the chart below, 2824 respondents were collected; 78.68 % of them reported that they had never travelled in Europe. Checking with more accuracy, it was discovered that many people belonging to the group Onsite Venice said they had never been to Europe before. This is an error, because they probably were interviewed at the Marco Polo Airport; therefore, that was their first experience in Europe. These respondents were held in the “Not visited EU” group.

FREQUENCY TABLE, “VISITED EU”/”NOT VISITED EU” RESPONDENTS

	Frequency	%
Not visited EU	2222	78.68
Visited EU	602	21.32
TOT	***2824***	***100***

Fig.4.5.Source: Patt, 2018

4.2.2. The socio-demographic classifications

Two socio-demographic classifications were used to distinguish the sample: (1) “EU Experienced” versus “Not EU Experienced”. (2) “Millennials” versus “Not Millennials”. Starting from the analysis of the “Visited EU” / “Not visited EU” respondents, the editor of the report used the IP address (obtained through their answer to the survey) to create a sub-group; those who responded “Yes” and whose IP was from a European nation, were identified as “EU Experienced”. On the other hand, those who responded “No” and whose IP was not from a European nation, were identified as “Not EU Experienced”. This classification was done to double-check and correct the response of this question, trying to avoid the before mentioned misunderstanding.

BARPLOT, FREQUENCIES BETWEEN "VISITED EU"/"NOT VISITED EU" RESPONDENTS

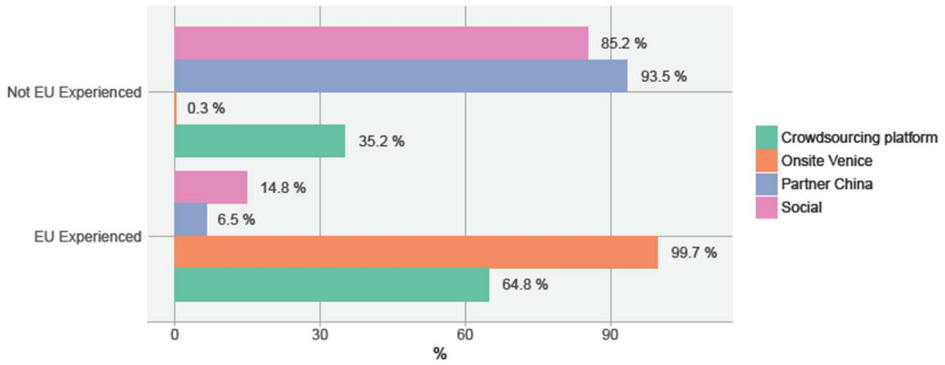

Fig.4.6. Source: Patt, 2018

FREQUENCY TABLE, "EU EXPERIENCED"/"NOT EU EXPERIENCED" RESPONDENTS

	Frequency	%
EU Experienced	748	26.49
Not EU Experienced	2076	73.51
TOT	***2824***	***100***

Fig.4.7. Source: Patt, 2018

The socio-demographic classifications "Millennials" and "Not Millennials" has been chosen because Chinese Millennials are playing an increasingly important role in the tourism market, as illustrated in the previous chapters. Here, I would like to remember that, according to the literature, the so-called Millennials are those born between 1980 and 1995. Subsequently, I will unfold each point of view to give the reader a more clear knowledge of the process.

BARPLOT, FREQUENCIES FOR AGE BETWEEN MILLENNIALS/NOT MILLENNIALS RESPONDENTS

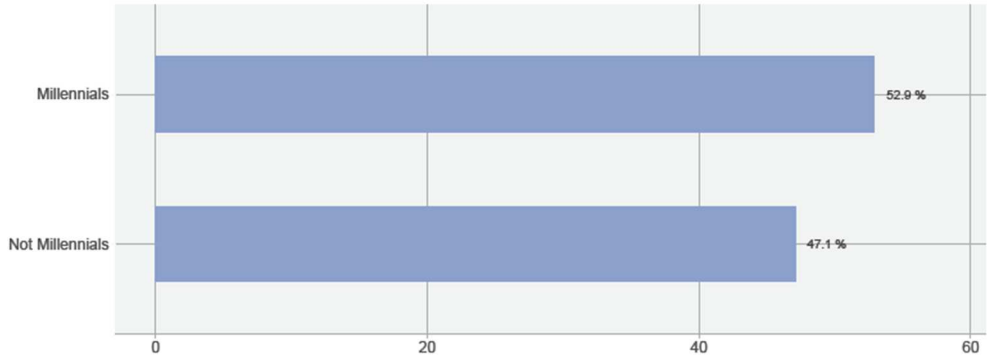

Fig. 4.8. Source: Patt, 2018

FREQUENCY TABLE, MILLENNIALS/NOT MILLENNIALS RESPONDENTS

	Frequency	%
Millennials	1478	52.92
Not Millennials	1315	47.08
TOT	***2793***	***100***

Fig. 4.9. Source: Patt, 2018

4.2.2.1. EU Experienced and Not EU Experienced

In this section, the **travel behaviour** of the Chinese respondents is described. The respondents had to choose among four motivational dimensions:

• CULTURE, for example: to visit historical/cultural sites, to increase the knowledge of new places, to meet local people, to take part in cultural events.

• PLEASURE SEEKING/FANTASY, for example: to mix with fellow tourists, to seek adventure, to have fun, to get away from home, shopping.

• RELAXATION, for example: to regenerate emotionally and physically, to spend time with your loved ones, to relax, to enjoy the good weather.

• SPORT/NATURE, for example: to get close to nature, to engage in sports, to be active.

The survey reveals that the **principal motivations** for travelling to Europe are Culture and Relaxation

Considering the previous data, the **preferred tourist experiences** for Chinese tourists are related to Health and Wellness and Culture, as can be seen from the following chart. They had to choose among health and wellness, culture, green and nature, backpacking, adventure and wild, social, business, religion, sports and recreational. These data are backed up by the information I found in the literature about the changes in attitudes and preferences of Chinese tourists. If in the past they just travelled with the only purposes to see places and be able to show pictures to friends and relatives, now they are interested also in relaxing and enjoying a less frenetic lifestyle.

BARPLOT, FREQUENCIES FOR PREFERRED TOURIST EXPERIENCES

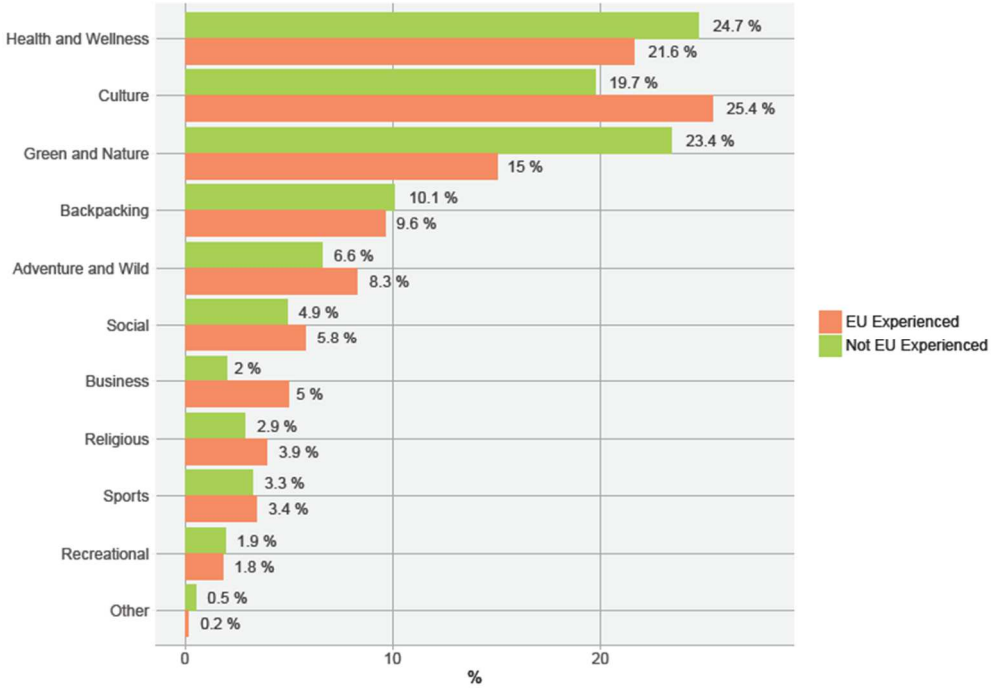

Fig. 4.10. Source: Patt, 2018

It also comes out from the survey that the **preferred types of accommodation** - among B&B, Luxury Hotel, 3−star Hotel, Hostel, Room for rent and Airbnb, Farmhouse, Camping and Others - are B&B and Luxury Hotels. Most Chinese people prefer **travelling with** their friends, family or partners, rather than by themselves, even if it is an attitude more and more widespread among the young Chinese tourists too. Moreover, the "Visited EU" group reported that the **duration of stay** of their visit in Europe for the majority of tourists was of 6-8 days and more than 8 days.

The "Visited EU" group was asked which their **favourite destinations in Europe** were**.** The results show that the most appreciated cities were Venice and other European cities like Paris, London, Rome, Florence, Milan and so on. Among them, as we can see from the chart, Venice is also the first choice amid Italian destinations. In order to have a better understanding of the data, the data were analysed by Touch-point sources, that is: "China" (data collected online through Chinese local partners) and "Onsite Venice" (respondents were recruited in Venice by interviewers and survey completed in assisted mode). Looking at the barplot, Venice was the favourite tourist destination for about 32,2% of the total respondents, with a preponderance for the "Onsite Venice" respondents. On the other hand, Paris was chosen mostly by "China" respondents, with a total of 28,7%.

BARPLOT, FREQUENCIES FOR PREFERRED EUROPEAN DESTINATIONS

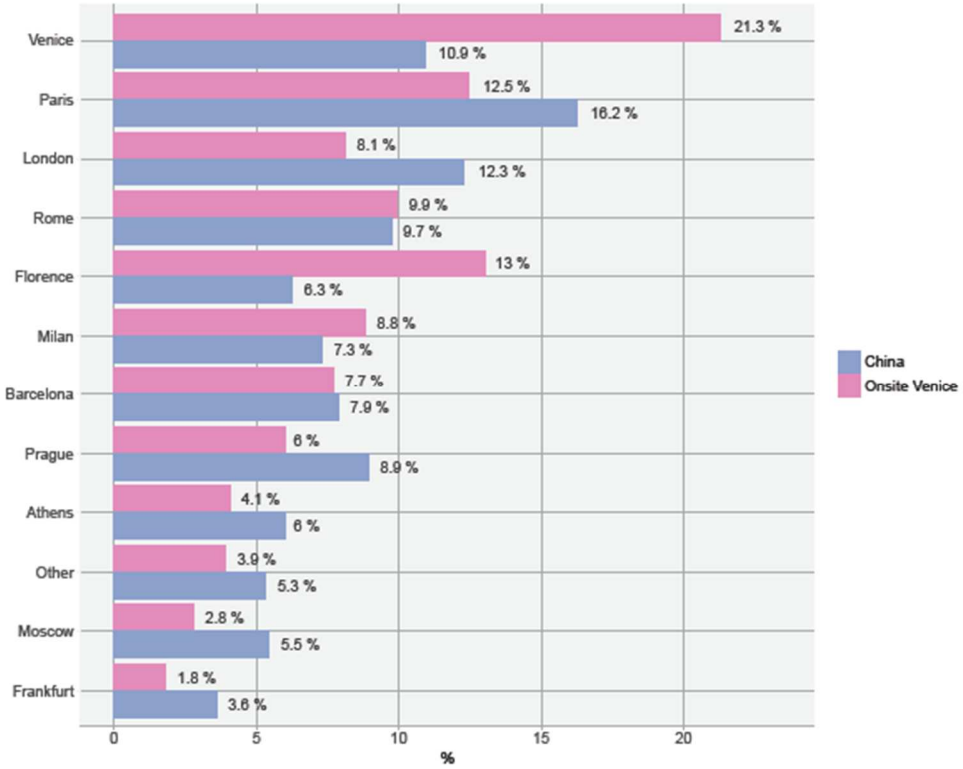

Fig. 4.11. Source: Patt, 2018

The respondents had to reply to a multiple-choice question about the **perception of their personality**. The personality of respondents was assessed through the Gosling's Ten Item Personality Inventory (Gosling, Rentfrow, and Swann, 2003)[173] which is based on the Five Factor model of personality - Openness to experience, Conscientiousness, Extraversion, Agreeableness, Neuroticism - (Rossellini and Brown, 2011[174]). The Big Five Theory, among the different personality theories, is considered the most able one to develop a tool for the evaluation of the personality. This theory, elaborated by McCrae and Costa (1987), is one of the most shared and tested theoretical and empirical models among the models focused on the study of personality. Therefore, it can be said that the trustworthiness of this theory is well supported by the main literature. In the multiple-choice question, respondents had to choose among the so-called OCEAN variables:

• OPENNESS TO EXPERIENCE (inventive/curious vs. consistent/cautious): levels of curiosity, independent judgment and conservativeness

• CONSCIENTIOUSNESS (efficient/organized vs. easy-going/careless): conscientiousness one's level of self-control in planning and organization

[173] http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.113.6704&rep=rep1&type=pdf
[174] http://sites.bu.edu/tabrown/files/2014/08/Rosellini-Brown-2011.pdf

• AGREABLENESS (friendly/compassionate vs. challenging/detached): altruistic, sympathetic, and cooperative tendencies

• NEUROTICISM (sensitive/nervous vs. secure/confident): the tendency to experience negative emotions and psychological distress in response to stressors.

The result of the question was that the "Visited EU" group was more inclined to *Openness to experience*, *Conscientiousness* and *Agreeableness* than the "Not visited *EU* group".

All the participants of the research were asked: "Do you think there should be a direct flight from China to Venice?" It is significant that the preponderance of the respondents thinks that **a direct flight** from China to Venice should be established. It is easy to understand this wish since tourists still have to travel long and uncomfortable distances, using further airports and then arriving at Venice by car or train, otherwise they have to buy flights with two or more stopovers. Eventually, as it can be seen by the bar chart below, the most used airlines among the whole sample were *Air China*, *China Easter Airline*, *Lufthansa*, *Air France*. The most used airports were *Venice Marco Polo Airport* and big international airports like *Paris Charles de Gaulle*, *Milan Malpensa* and *London Heathrow*. In this occasion too, the editor of the report subdivided the data by Touch-point sources, analysing separately the "Onsite Venice" group, in order to have a better understanding of the data. Looking at the chart "Barplot frequencies for Used Airlines" we can see that *Air China*, with a total of 35,7% of choices and *China Eastern Airline* with a total of 19,4% of choices , are the top used airports. The percentage however is higher for "China" respondents than "Onsite Venice" one in both cases. As for the chart "Barplot frequencies for Used airports", instead, the "Visited EU" group showed a higher prevalence for the use of *Venice Marco Polo Airport* (25,5%), because at that time, many of the respondents were tourists in Venice, therefore they used the *Venice Marco Polo Airport* to arrive there. *Venice Marco Polo Airport* totalised 33,8% of choices, and *Paris Charles de Gaulle* 27,3% of choices.

BARPLOT, FREQUENCIES FOR USED AIRLINES

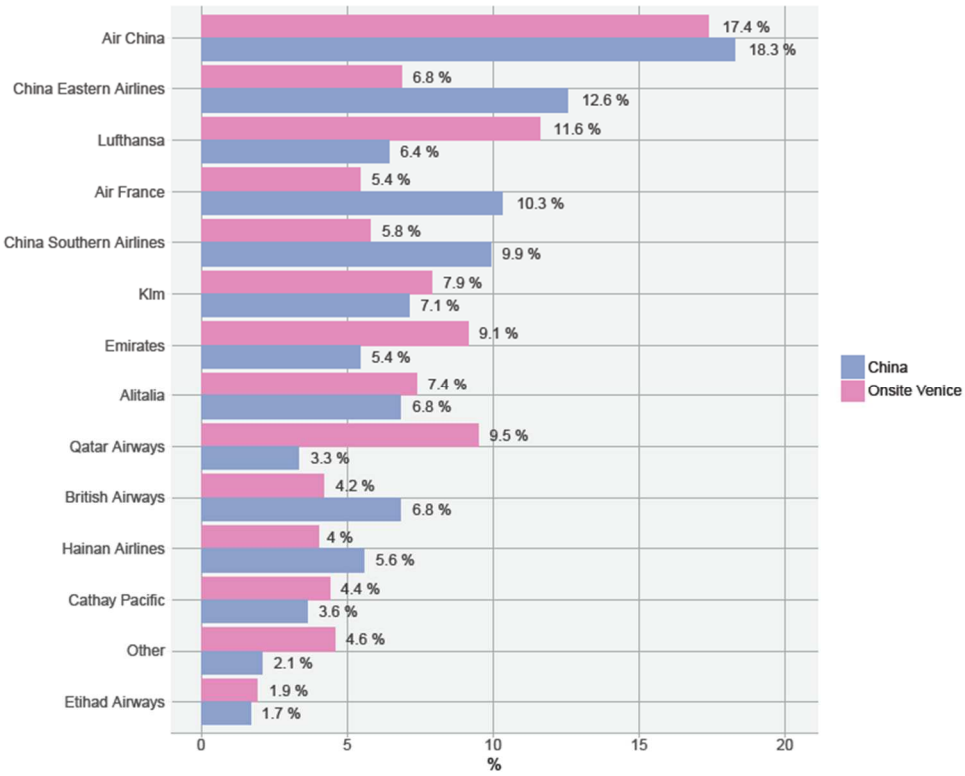

Fig. 4.12. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR USED AIRPORTS

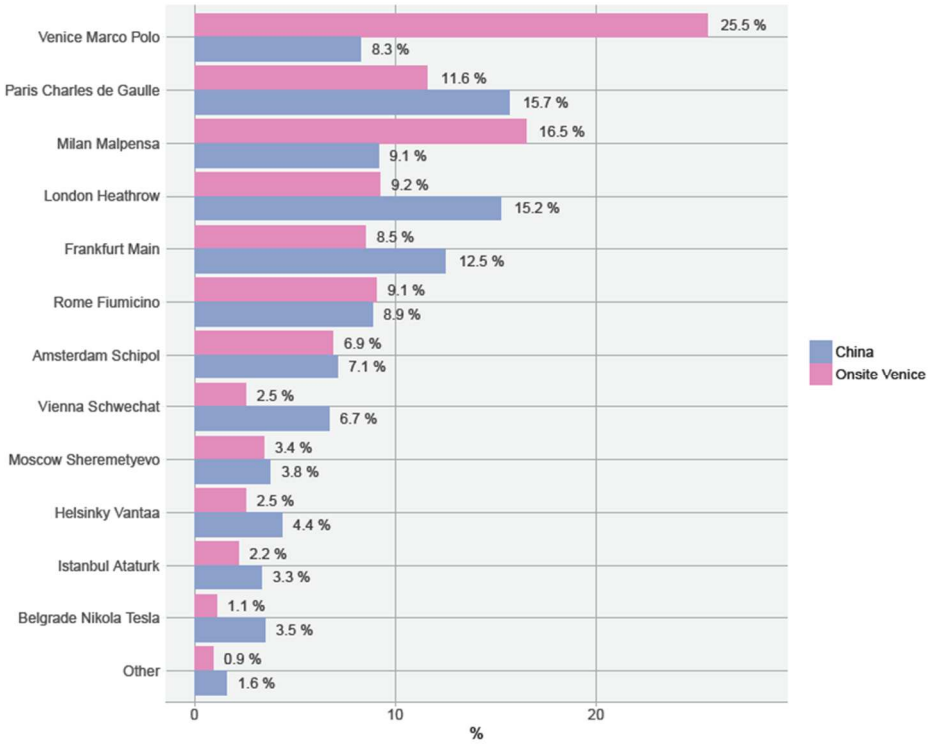

Fig. 4.13. Source: Patt, 2018

The participants of The *Visited EU* group who used the *Venice Marco Polo Airport* were asked to assess their **satisfaction for the airport services** using a seven-point scale: from 1= Very dissatisfied, to 4=Neutral and 7=Very satisfied. All the services received an average rating between *Slightly Satisfied* and *Satisfied.* Airports need to consider a wide range of services when dealing with tourists, in particular with Chinese tourists: services are very important for them, since the more the services are customised for their needs, the more they will feel considered. The services rated are Hostess courtesy, Airport services, Info point, Hostess professionalism, Vip services, Duty free, Terminal design, Wc, Security, Waiting room, Wifi and Restaurants. At the top there are Hostess courtesy and Airport service, and at the bottom Wi-Fi and Restaurants. For all the others participants, the survey assessed the importance of these services as overall judgment of the airport experience; however, in this case, Security, Airport services and toilets were the top rated.

In this section, for "EU Experienced"/"Non EU Experienced" groups, the survey assessed **"Destination Personality" and "Brand Personality" of Venice**. As for the "Destination Personality" question, the respondents were asked: "If the city of Venice was a person, which of the following adjectives would you use to describe it?" (Exciting, Sophisticated, Active, Dependable, Hospitable, Rugged). The measurement was achieved with Hultman & Skarmeas' Destination Personality scale (Hultman et al. 2015)[175] using the following dimensions

- Exciting (Charming, Original, Spirited)
- Sophisticated (Glamorous, Elegant, Trendy)
- Active (Energetic, Dynamic, Lively)
- Dependable (Reliable, Sincere, Honest)
- Hospitable (Funny, Warm, Cheerful)
- Rugged (Tough, Rugged, Bold)

The highest rating was given for Exciting, Sophisticated and Hospitable. As for the "Brand Personality" question, the respondents were asked: "If the city of Venice was a person, which of the following adjectives would you use to describe it?" (Responsible, Active, Aggressive, Simple, Emotional).

- Responsible (stable, down-to-earth)
- Active (dynamic, innovative)
- Aggressive (bold)
- Simple (ordinary)

[175] https://www.sciencedirect.com/science/article/abs/pii/S0148296315002301

- Romantic (sentimental)

The "Brand Personality" of Venice was measured with Geuens's Brand Personality (Geuens; Weijters; Wulf, 2009)[176] using the dimensions of Responsible, Active, Aggressive, Simple, Emotional. All the dimensions received an above-average value, except for Simple, which is mainly neutral. The **Emotional feedback** of Venice was assessed for all the participants too. As the reader can see from the chart below, the predominant emotions are Joy and Curiosity, which was obviously the most chosen among respondents of the "Not Visited EU".

BARPLOT, EMOTIONS DISTRIBUTIONS EU EXPERIENCED/ NOT EU EXPERIENCED

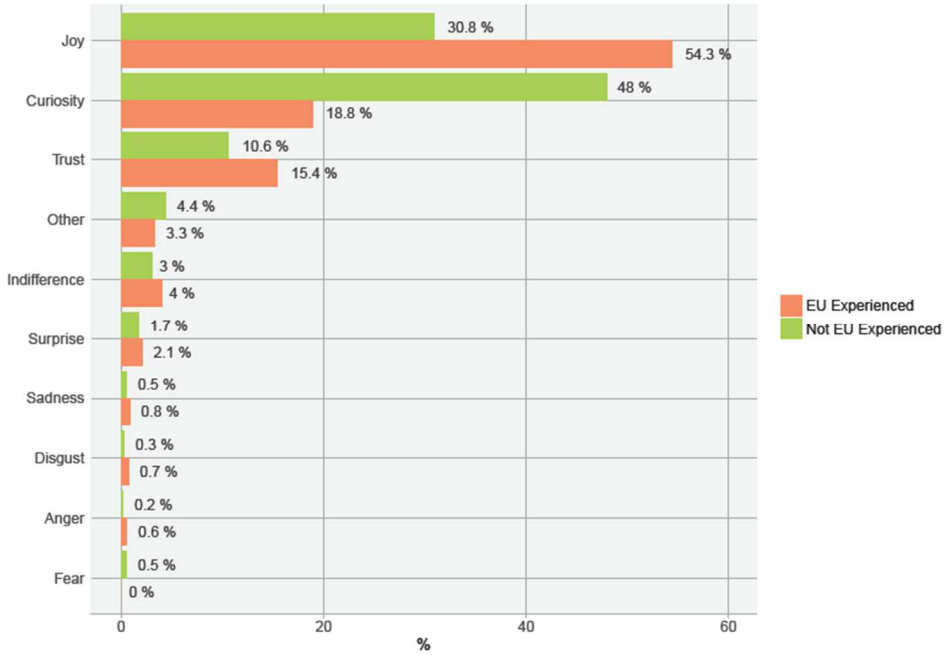

Fig. 4.14. Source: Patt, 2018

Overall, the Chinese respondents as for **Promotion and Revisit Intention** of Venice chose medium-high values. Besides, most respondents were satisfied of their experience in Venice, however they were insecure about their future revisit intentions. This is maybe due to the fact that, for Chinese tourists, Italy and Europe are quite far and for the majority of Chinese people, once they visit one place, even if they liked it, they prefer to visit other famous places nearby. The situation is different for those lucky tourists who are rich enough not to have to choose carefully if visit again a place or not.

Analysing the questions about the **sociodemographic characteristics** (age, gender, residence, education, employment status), and the relative charts below, we can see that the "EU Experienced"

[176] https://www.researchgate.net/publication/222707780_A_new_measure_of_brand_personality

and “Not EU Experienced” sample, is mainly composed of people between 21-30 years old, bachelor degree students, with a small prevalence of female people and who are living in China.

BARPLOT, FREQUENCIES FOR AGE BETWEEN

EU EXPERIENCED/NOT EU EXPERIENCED RESPONDENTS

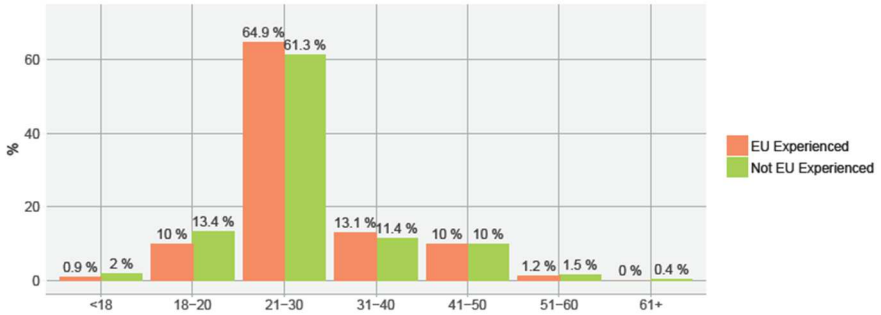

Fig. 4.15. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR GENDER BETWEEN

EU EXPERIENCED/NOT EU EXPERIENCED RESPONDENTS

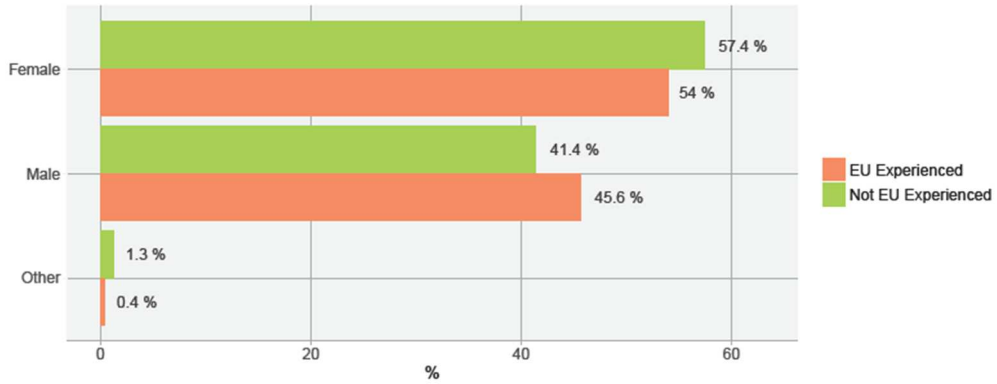

Fig. 4.16. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR RESIDENCE STATUS BETWEEN

EU EXPERIENCED/NOT EU EXPERIENCED RESPONDENTS

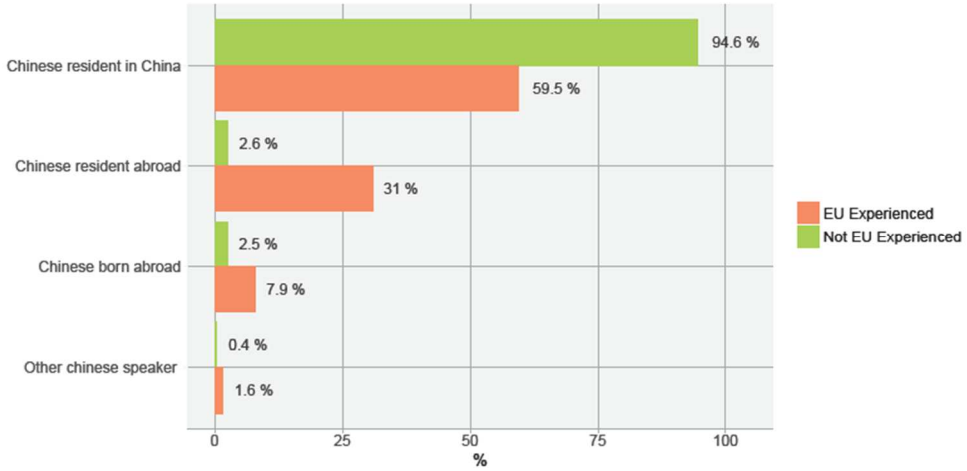

Fig. 4.17. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR EMPLOYMENT STATUS LEVEL

BETWEEN EU EXPERIENCED/NOT EU EXPERIENCED RESPONDENTS

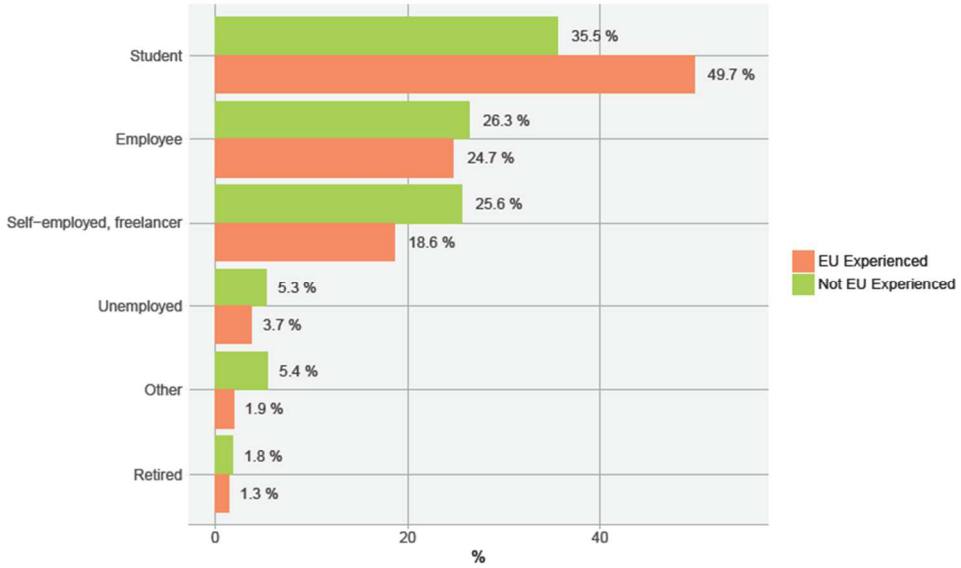

Fig. 4.18. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR EDUCATIONAL LEVEL

BETWEEN EU EXPERIENCED/NOT EU EXPERIENCED RESPONDENTS

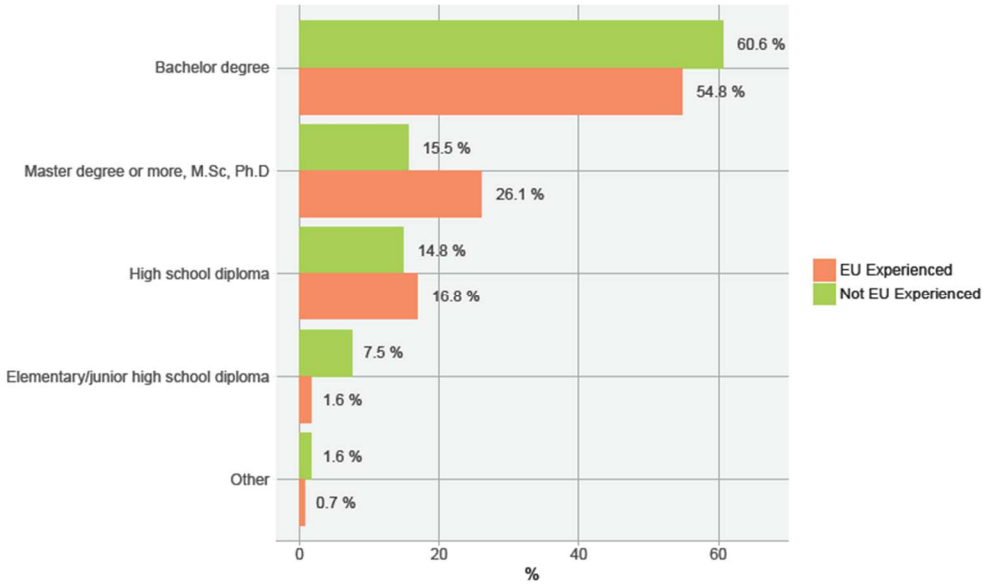

Fig. 4.19. Source: Patt, 2018

4.2.2.2. Millennials and Not Millennials

In this section the **travel behaviour** of the "Millennials" and "Not Millennials" group is described. The respondents had to choose among four motivational dimensions:

• CULTURE, for example: to visit historical/cultural sites, to increase the knowledge of new places, to meet local people, to take part in cultural events.

• PLEASURE SEEKING/FANTASY, for example: to mix with fellow tourists, to seek adventure, to have fun, to get away from home, shopping.

• RELAXATION, for example: to regenerate emotionally and physically, to spend time with your loved ones, to relax, to enjoy the good weather.

• SPORT/NATURE, for example: to get close to nature, to engage in sports, to be active.

Through the analysis of the **motivations for visiting Europe**, we can infer that there is small difference between the two groups for all the dimensions, except for Culture and Pleasure, since it seems that "Millennials" consider these two last dimensions as more important. Those data may reflect the changes in the state of mind of the young Chinese tourists, but again, the age difference is not so noticeable to allow us to make a clear comparison. The survey reveals that for the "Millennials"/"Not Millennials" sample too, the **principal motivations for travelling to Europe** are Health and Wellness and Culture (among the dimensions of Health and Wellness, Culture, Green and Nature, Backpacking, Adventure and Wild, Social, Business, Religious, Sports and Recreational).

BARPLOT, FREQUENCIES FOR PREFERRED TOURIST EXPERIENCES- MILLENNIALS

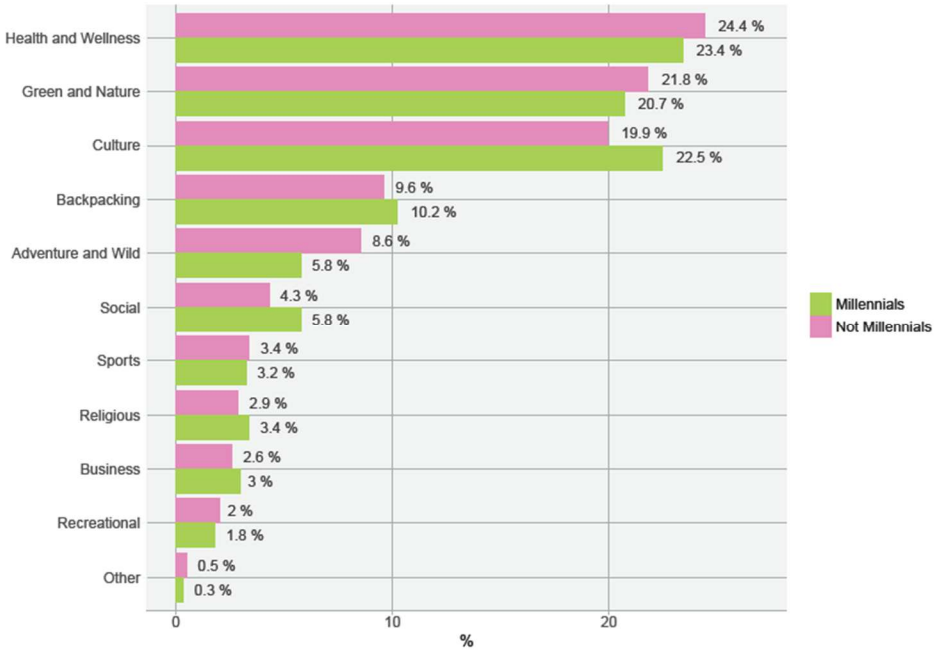

Fig. 4.20 Source: Patt, 2018

Regarding to the **preferred types of accommodation** , it comes out as for the "Eu Experienced"/"Not Eu Experienced" group too, that among B&B, Luxury Hotel, 3−star Hotel, Hostel, Room for rent and Airbnb, Farmhouse, Camping and Others, B&B and Luxury Hotels, are the most chosen. As in the previous session, most Chinese people prefer **travelling with** their friends, family or partners rather

than by themselves, even if, according to the literature, Millennials are more and more keen on travelling alone. Moreover, for both the "Millennials" and "Not Millennials" group the **duration of stay** of their visit in Europe, for the majority of them, was of 6-8 days and more than 8 days.

The "Visited EU" group was asked the following question: "Which are the European tourist destinations that you prefer?". This group was further subdivided into "Millennials"/"Not Millennials". The **favourite destinations in Europe** include Venice and other Italian and European important cities (Paris, London, Rome, Florence, Milan and so on), among which Venice is also the first choice amid Italian destinations, as showed by the chart.

BARPLOT, FREQUENCIES FOR PREFERRED EUROPEAN DESTINATIONS TO VISIT - MILLENNIALS

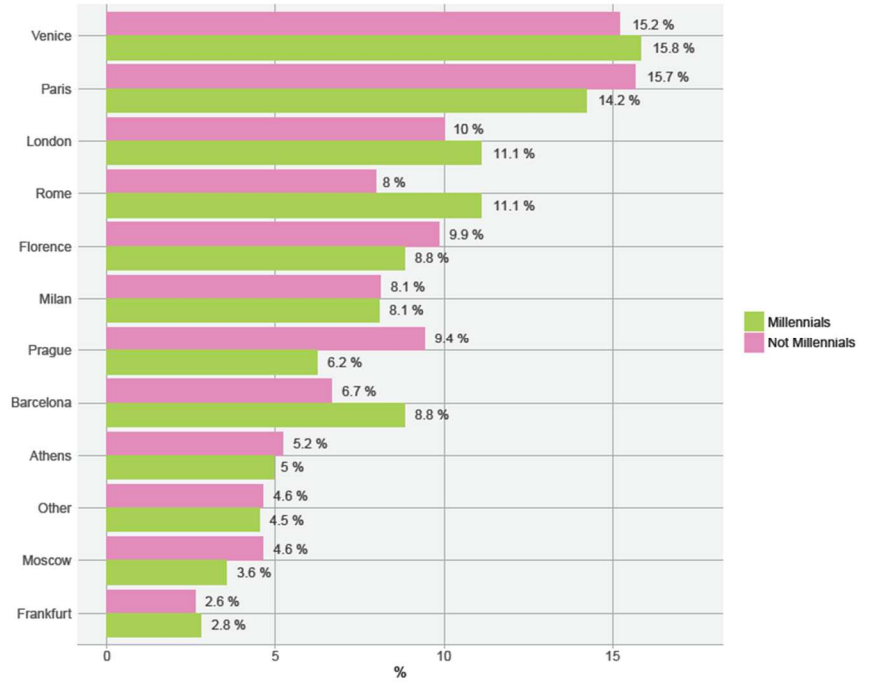

Fig. 4.21. Source: Patt, 2018

The **personality** of respondents was assessed through the Gosling's Ten Item Personality Inventory (Gosling, Rentfrow, and Swann, 2003) [177] which is based on the Five Factor model of personality - Openness to experience, Conscientiousness, Extraversion, Agreeableness, Neuroticism - (Rosellini and Brown 2011) [178].

The respondents had to reply to a multiple-choice question based on the Five Factors:

[177] http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.113.6704&rep=rep1&type=pdf
[178] http://sites.bu.edu/tabrown/files/2014/08/Rosellini-Brown-2011.pdf

• OPENNESS TO EXPERIENCE (inventive/curious vs. consistent/cautious): levels of curiosity, independent judgment and conservativeness;
• CONSCIENTIOUSNESS (efficient/organized vs. easy-going/careless): conscientiousness one's level of self-control in planning and organization.
• AGREABLENESS (friendly/compassionate vs. challenging/detached): altruistic, sympathetic, and cooperative tendencies;
• NEUROTICISM (sensitive/nervous vs. secure/confident): the tendency to experience negative emotions and psychological distress in response to stressors.
According to the data analysed, "Millennials" are slightly more Conscientious than the "Not Millennials" group, moreover, very small differences have been found for Agreeableness (higher for "Millennials") and Neuroticism (lower for "Millennials").

The "Millennials" /"Not Millennials" group, in the same way as the "Eu Experienced"/"Not Eu Experienced" sample, think that a **direct flight** from China to Venice should be established. The Visited EU group was asked the following question: "Which companies did you used to travel in Europe?". This group was further subdivided into "Millennials" /"Not Millennials". We can infer from the chart below that the four most used airlines among the whole sample were *Air China*, *China Southern Airlines*, *Lufthansa* and *China Eastern Airlines*. Afterwards, the most used airports were *Venice Marco Polo Airport* and big international airports like *Paris Charles de Gaulle*, *Milan Malpensa* and *London Heathrow*. Looking at the chart "Barplot frequencies for Used Airlines" we can see that *Air China*, with a total of 35,5% of choices and *China Eastern Airline* with a total of 20,1% of choices , are the top used airports. The percentage however is higher for "Millennials" respondents than "Not Millennials" one in both cases. As for the chart "Barplot frequencies for Used airports", instead, the "Not Millennials" group showed a higher prevalence for the use of *Venice Marco Polo Airport* (19,1%). *Venice Marco Polo Airport* totalised a 32,9% of choices, and *Paris Charles de Gaulle* a 27,7% of choices.

BARPLOT, FREQUENCIES FOR USED AIRLINES- MILLENNIALS

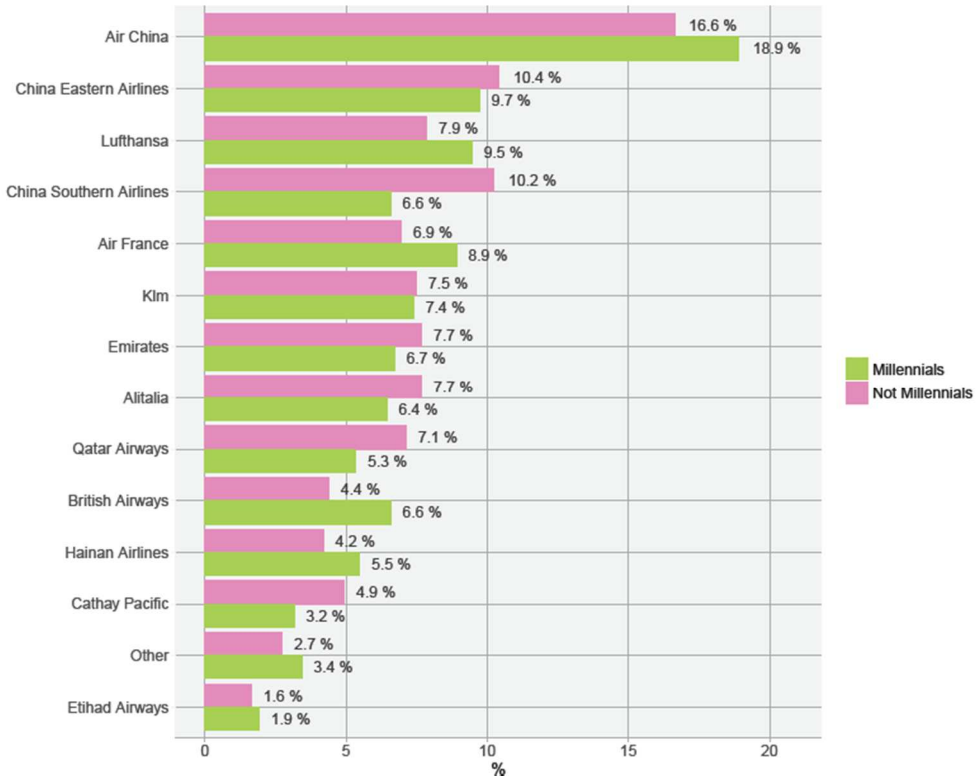

Fig. 4.22. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR USED AIRPORT- MILLENNIALS.

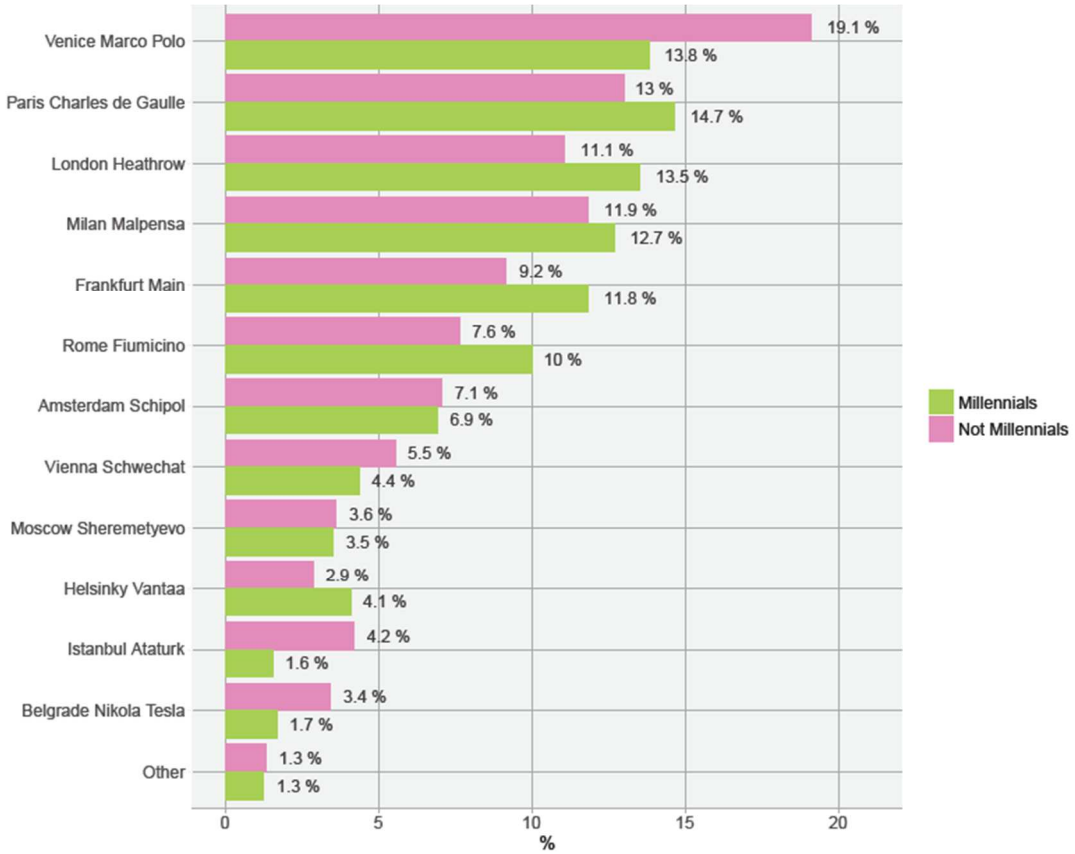

Fig. 4.23. Source: Patt, 2018

Subsequently, the participants who were both included in the "Millennials" /"Not Millennials" sample and in the "Visited EU" group, and who used the *Venice Marco Polo Airport* were asked to assess their satisfaction for the airport services through a seven-point scale: from 1= Very dissatisfied, to 4=Neutral and 7=Very satisfied. In the same way as the "EU Experienced" and "Not EU Experienced" all the services received an average rating between Slightly Satisfied and Satisfied. The services rated are Hostess courtesy, Airport services, Info point, Hostess professionalism, Vip services, Duty free, Terminal design, Toilets , Security, Waiting room, Wifi and Restaurants. At the top there are Hostess courtesy and Airport service, and at the bottom Wi-Fi and Restaurants. For all the others participants the survey assessed the importance of these services as overall judgment of the airport experience.

In this section, for "Millennials" /"Not Millennials" groups the survey assess **"Destination Personality" and "Brand Personality" of Venice**. As for the "Destination Personality" question, the respondents were asked: "If the city of Venice was a person, which of the following adjectives would you use to describe it?" (Exciting, Sophisticated, Active, Dependable, Hospitable, Rugged). The measurement has been achieved with Hultman & Skarmeas' Destination Personality scale (Hultman et al. 2015)[179] using the following dimensions

- Exciting (Charming, Original, Spirited)
- Sophisticated (Glamorous, Elegant, Trendy)
- Active (Energetic, Dynamic, Lively)
- Dependable (Reliable, Sincere, Honest)
- Hospitable (Funny, Warm, Cheerful)
- Rugged (Tough, Rugged, Bold)

Comparing the answers of Millennials and Not Millennials, some significant differences can be observed in the values given to the dimensions of the Destination personality, where Millennials perceived Venice slightly more Exciting, Sophisticated and Active compared to the values given by the other group. As for the "Brand Personality" question, the respondents were asked: "If the city of Venice was a person, which of the following adjectives would you use to describe it?" (Responsible, Active, Aggressive, Simple, Emotional).

- Responsible (stable, down-to-earth)
- Active (dynamic, innovative)
- Aggressive (bold)

[179] https://www.sciencedirect.com/science/article/abs/pii/S0148296315002301

- Simple (ordinary)
- Romantic (sentimental)

The "Brand Personality" of Venice has been measured with Geuens's Brand Personality (Geuens; Weijters; Wulf, 2009) [180] using the dimensions of Responsible, Active, Aggressive, Simple, Emotional. All the dimensions received an above-average value except for Simple, which is mainly neutral.

The **Emotional feedback** of Venice was assessed with the question "What emotion do you feel for Venice?". The predominant emotions for the "Millennials" /"Not Millennials" group as for the "EU Experienced"/"Not EU Experienced" sample are *Curiosity, Joy* and *Trust*.

BARPLOT, EMOTIONS DISTRIBUTIONS BETWEEN MILLENNIALS/NOT MILLENNIALS.

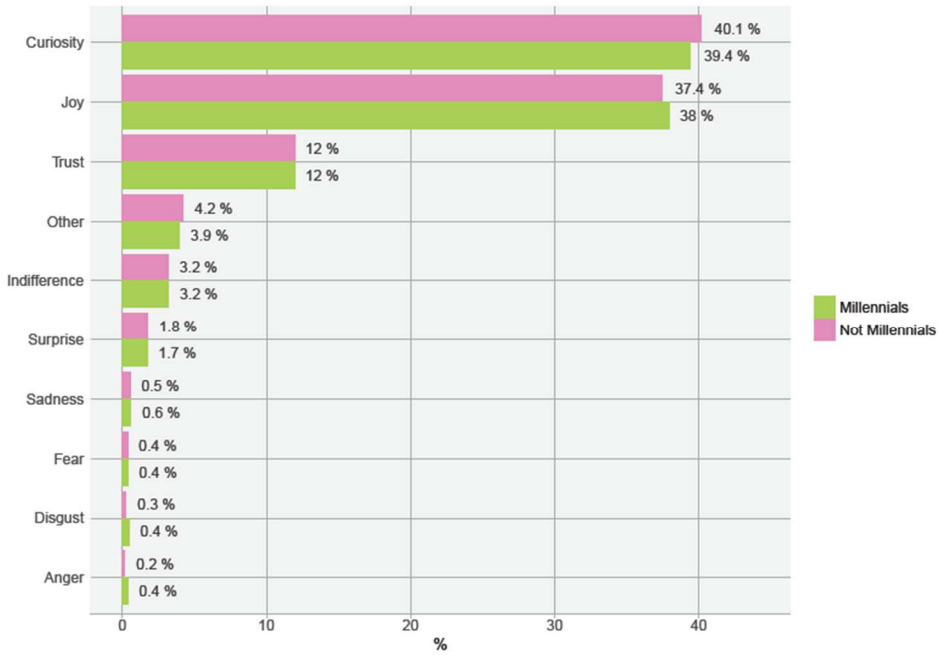

Fig .4.24. Source: Patt, 2018

To conclude, the "Millennials" group is generally more inclined to promote Venice and it identifies more easily with this city; this is the reason why the respondents generally chose medium-high values for Promotion and Revisit Intention of Venice. Besides, most respondents were satisfied of their experience in Venice, however they were insecure about their future revisit intentions as considered previously for the "EU Experienced"/"Not EU Experienced" sample.

Analysing the questions about the **sociodemographic characteristics** (age, gender, residence, education, employment status), and the relative charts below, we can see that the "Millennials" group

[180] https://www.researchgate.net/publication/222707780_A_new_measure_of_brand_personality

is **mainly represented** by young professionals, 24−29 year old, in prevalence women, who live in China and own a Bachelor degree (52.9%). There is not a striking difference with the "Not Millennials" group, due to the fact that the majority of respondent were young people, therefore in the "Not Millennials" group range, there are only bachelor degree students 19−23 year old (47.1%).

BARPLOT, FREQUENCIES FOR AGE BETWEEN MILLENNIALS/NOT MILLENNIALS RESPONDENTS

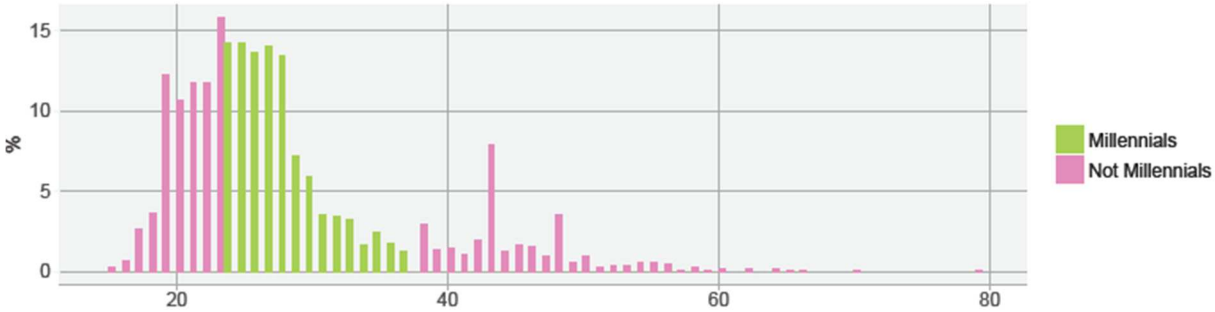

Fig. 4.25. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR GENDER BETWEEN MILLENNIALS/NOT MILLENNIALS RESPONDENTS.

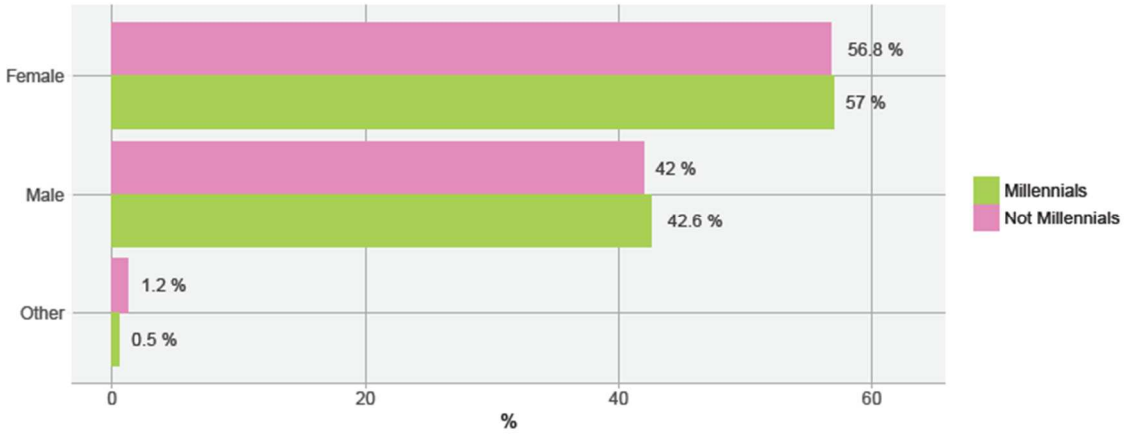

Fig. 4.26. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR RESIDENCE BETWEEN MILLENNIALS/NOT MILLENNIALS RESPONDENTS.

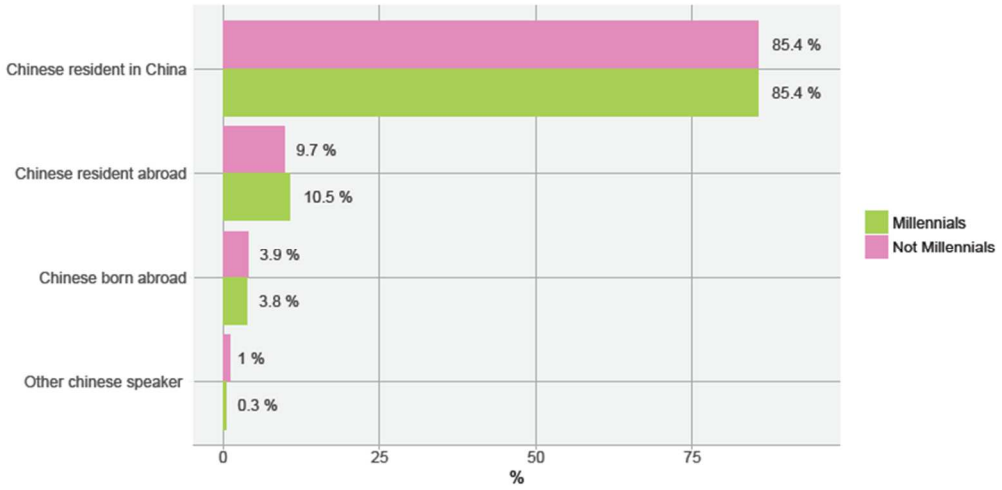

Fig. 4.27. Source: Patt, 2018

BARPLOT, FREQUENCIES FOR EMPLOYMENT STATUS

BETWEEN MILLENNIALS/NOT MILLENNIALS RESPONDENTS

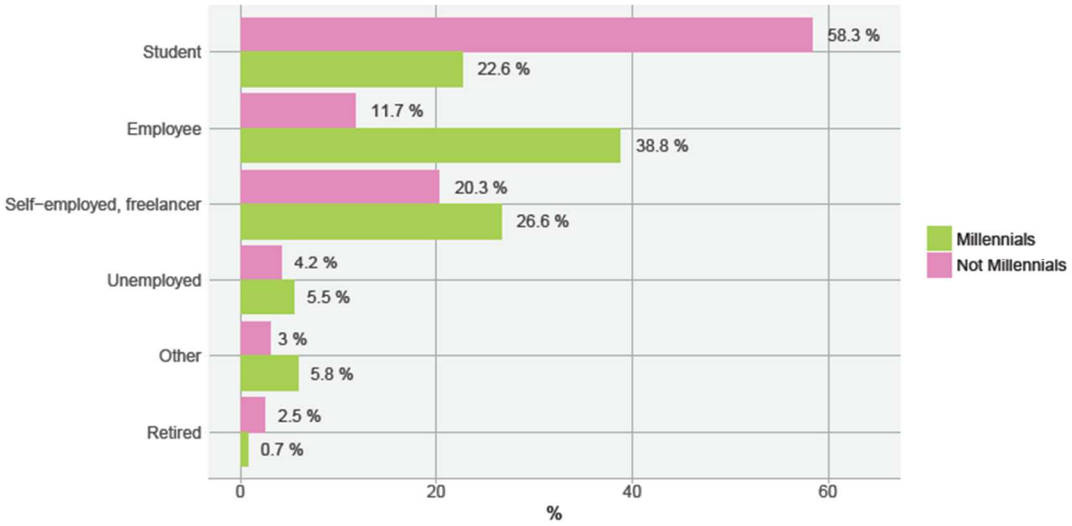

Fig. 4.28. Source: Patt, 2018

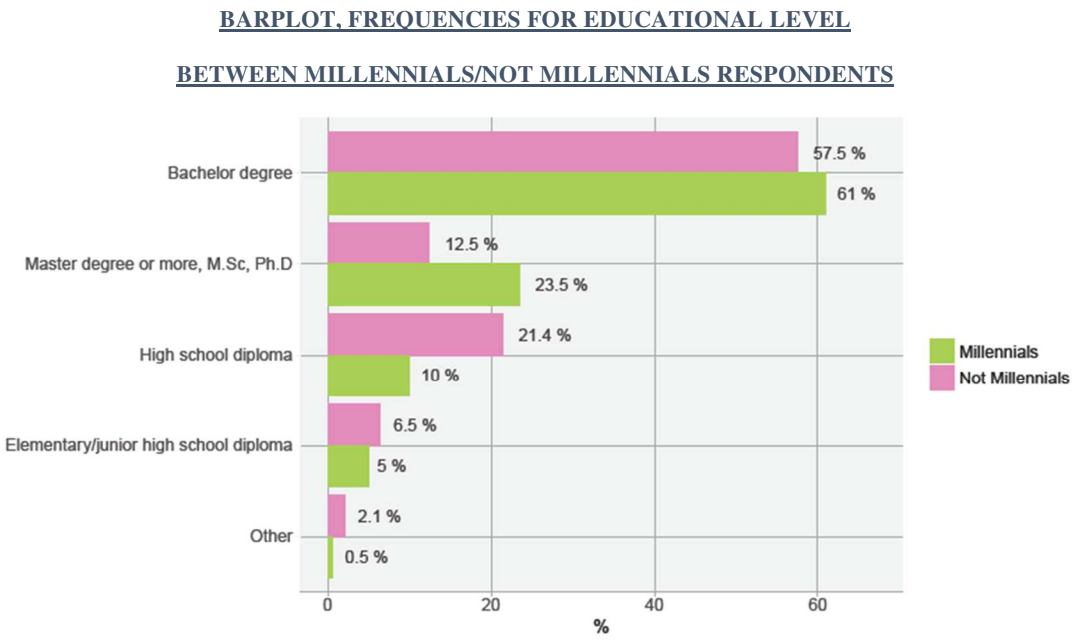

Fig. 4.29. Source: Patt, 2018

4.2.2.3. Conclusions and considerations about the survey

To conclude, from this survey it is possible to notice that Chinese tourists that travel to Europe and Venice mainly perceived themselves as conscientious and open to experience, maybe because Europe is still considered by Chinese people far and unknown; a feeling that is shared, by the way, by Europeans too. It is evident that Italian destinations are among the most chosen in Europe, among which Venice is perceived mostly as exciting, hospitable, active and sophisticated also by Chinese people that never visited EU, showing an established image of the city among the Chinese audience and identifying more easily with it. Moreover, from the survey, one can clearly see that the vast majority of the sample had a good travel experience in Venice and is willing to promote this destination among their friends and acquaintances. In accordance with these results, *Venice Marco Polo Airport* was also chosen among the most used airports by Chinese tourists that travelled in Europe. However, the lack of a direct flight from China to Venice makes it easier for Chinese travellers to choose other Italian airports (such as *Milan–Malpensa Airport* and *Leonardo da Vinci–Fiumicino Airport*) and European airports, when planning their visit. The degree of satisfaction regarding the services provided in the *Venice Marco Polo Airport* is generally medium-high. The services regarding restaurants and Wi-Fi were the ones that registered the lowest degree of appreciation, as stated before. This may be due to the fact that in the restaurants of the airport foods known and appreciated by the Chinese people are not available.

5. DISCUSSION AND CONCLUSION

As a conclusion of this dissertation, in this chapter I will introduce my opinions and considerations about the phenomenon of the Chinese tourism. This dissertation was not an easy task, since there is still few information about the Chinese tourism, which overwhelms Western scholars and connoisseurs because of its continually mutant form. In order to improve the service for Chinese tourists, we have to consider it using a 360-degree approach, which will take into account all the different steps, elements and sides composing the tourism environment. Therefore, I can only say that this text will represent a merge of all the thesis and considerations made since now, and it has no claim to be a vademecum that will solve the doubts of the western people and organisations who deals with Chinese tourists.

5.1. Marketing strategy for the Chinese tourists

Despite the dizzying numbers about the Chinese tourism market and outbound travels of the past years, many reports confirm the continuous growth of the market; although in 2017 a decrease has been reported, there is still room for the growth of the outbound Chinese tourism and travel market. China and tourism together offer something very promising for the future. Not only China will soon be one of the world's largest source markets for tourism, but also per-capita travel spending is increasing steadily. However, the analysis of studies, trends and experts' opinions have clearly shown that it will not be easy to find the right way to address this growing market and to participate in it. Marketing towards Chinese tourists, can be difficult, especially when organisations are trying to reach out to people who speak different languages and have a different set of wants and needs than the usual customers. Even though the fast-changing tourism market in China is continuously growing, European countries, like Italy, are not attracting as many tourists as one could expect from this growth. As it can be inferred, adopting the same traditional strategy (press conferences, brochures, purchase of advertising space etc.) without distinctions would be no longer successful. Furthermore, the obstacles of cultural differences and of a limited number of flights linking tourist destinations and China, will continue to impede the spread of the Chinese tourism. Therefore, there are two possible modalities of managing Chinese outbound tourism: either a system completely managed by Chinese tour operators, Chinese touristic guides and Chinese agencies in the foreign country, or a system managed by local operators. Obviously, the second one is more advisable; hence, in this case the touristic organisations will have to adapt the offer to the new market, monitoring the segment, carrying out targeted promotion and coordinating their action with the whole tourist system of the

country and with Chinese partners. Moreover, organisations should invest in specific training of one's personnel and create Chinese-oriented, high quality and customized services. Here below I am going to list some considerations and suggestions that organisations can take into account to better manage Chinese tourists.

Considering the Different Needs of Chinese Tourists

Organisations should avoid stereotyping Chinese tourists since, as we have seen in the previous chapters, Chinese tourists come from different parts of a huge territory, in which people have very different attitudes. Moreover, they are becoming increasingly sophisticated; therefore, tourism organisations should provide different travel arrangements and travel experiences. For instance, marketers should consider providing options designed ad hoc for specific sectors of tourists, such as the young, the elderly, the families with children and so on. Differentiation of needs will also lead to an increase in the number of niche markets. We have seen that, in the tourism sector, tourists are becoming increasingly savvy, therefore it is highly probable that customizing travel offers will be the only way service providers could succeed. «The future Chinese traveller will turn from a rather passive holiday taker into a holiday maker who would like to have some activity options on their trip» (Z_punkt, TUI AG, 2012) [181] . Therefore, it is important to offer appropriate services and infrastructures, including the increase of signage in Mandarin and trained staff, which will help Chinese tourists to travel independently without a guide, even if they do not have a proficiency in English. The third element which has to be taken into consideration is that the needs of the Chinese tourists are continuously changing. In the case of the Chinese consumer class, we have seen previously that it once largely focused on shopping, but now it seeks out experiences over material goods. According to the survey, dining, sightseeing, and relaxation have been gaining importance, while shopping has slipped in lower positions; this also means that the tourism organisations will need to work harder to market experiences to travellers.

Focusing on Experiences

Chinese tourists that travel abroad usually raise high expectations about the hospitality they are going to receive in the touristic destination: guaranteeing high-quality hospitality and services is another important element to consider, when dealing with this market (EU SME centre, 2015)[182]. The research shows that the majority of Chinese tourists expect services that enhance their experience,

[181] http://sete.gr/_fileuploads/entries/Online%20library/GR/New_Chinese_Tourists_in_Europe_from_2017_en.pdf
[182]https://www.google.com/search?q=EU+SME+centre.+Sector+report.+The+tourism+market+in+china%2C+2015.&ie=utf-8&oe=utf-8&client=firefox-b

such as Chinese-speaking staff, payment by *Union Pay* and similar services that we have seen to play an important role from the point of view of the Chinese tourist. Hospitality received can become a marketing activity, which helps secure customer loyalty, stimulate word-of-mouth and stimulate customers to promote touristic destination offer in their social circles (Dall'Ara, 2013). In addition, organisations can consider collaborating with leading tourist attractions and other institutions, offering major services to provide an all-around experience, in order to differentiate themselves from competitors. The Veneto region and the whole of Italy could offer many types of experiences that are considered new by the Chinese tourist, however, until now, very few organisations and Italian regions have thought to focus and attract Chinese tourists. Some stunning examples are many areas in the Dolomites, Sardinia or Sicily, which can offer wild, natural spots and unusual activities. These regions could be very attractive for the Chinese tourists; but the percentage of that kind of tourists is critically low and these destinations are not brought to the attention of the Chinese tourists because local people are not used to deal with them. On the other hand, in most tourist places as Venice, for example, they have been able to take advantage form the rise of China's consumer class, which increased travel market.

Engaging with Chinese Tourists Online

An important trend in China is the recent stunning development of the Internet and the fast increase in its uses in everyday life, among a large portion of the Chinese population, particularly the urban one and the young population (25-35 years old), which is increasing faster than the other categories. This is why organisations should engage with Chinese tourists online at every stage of their trip; the contemporary researches show indeed that the majority of Chinese tourist use online resources at most when they search travel destinations and plan trips, and rely heavily on their smartphones, while abroad. Since the majority of Chinese tourists use smartphones to keep in touch with others, organisations can encourage them to share their experiences, which are more influential than traditional online advertisements or sponsored content.

Social media in China is not only a successful way to spread information, communicate and create new contacts, but, in the last years, it has become a marketing tool for every kind of business, including the tourism one. Moreover, from the marketing side, it is important to advertise on the channels used the Chinese. Social media and apps are essential to understand how Chinese tourists seek information and to identify the elements that influence their choices. Traditional media, like

television films and advertising, still have a great power on Chinese people, but peer-to-peer communication and word of mouth are the most influential ones (Sturla, 2017)[183].

It is possible to interact with Chinese users through Chinese tourism websites, such as *Mafengwo*, and Chinese travel agency websites, such as *Qunar*. These websites let users write, insert photos and create reviews. By responding to user comments and messages, it is possible to create a lasting relationship with new possible customers. It is important for tourism organisations to be active online, as Chinese people are, in order to attract their attention and create a relationship. In the same way, it is useful to get in contact with the previously mentioned Key Opinion Leaders (KOL) since their actions are seen all around China, by millions of fans. They are effectively social media influencers and therefore cooperating with them can be expensive and tricky. Evidently, all the information and contents should be in Chinese language, due to language barriers: many Chinese do not speak English, so they must be enabled to browse easily.

To sum up, tourism websites and platforms should offer services for the different segments of tourists before, during and after the travel. In the first phase, the new generation of website and social media are able provide a virtual 'one-stop service' (一站式服务 yizhanshi fuwu), meaning that users can organize every aspect of their trip just surfing the web (Long, 2011). In the second phase, tourism organisations and businesses should provide follow-up services during the trip. Chinese people prefer to be given information and to be helped with difficulties and unfamiliar attitudes; in a few words, they do not like to be left alone. After the travel, the after-sale services are considered to be very important. At this stage, consumer loyalty can be reinforced and the positive word of mouth can work as a cheaper and more effective advertisement. During and after the trip, tourists will share their experience through social media and tourist websites blogs; moreover, loyalty programs and lotteries, which are appreciated by Chinese tourists, could encourage them to be active in the online communities.

Web marketing essentials

When dealing with web marketing in China, one of the most important peculiarities that we need to point out is the 'Great Firewall' 《防火长城》(Fánghuǒ chángchéng Great Firewall of China) (Zhang, 2010)[184]. It is a complex censorship system that prevents many Western websites from being seen and read by Chinese internet users; the blocked websites include many Western social media, like *Facebook*, *WhatsApp*, *Twitter*, *YouTube* and *Google*. Many Chinese tourists, which have already travelled abroad, may have an account on these Western social media or could have installed some

[183] https://www.hoover.org/sites/default/files/research/docs/clm47ms.pdf
[184] http://edu.people.com.cn/GB/145827/145828/154647/12103313.html

VPN applications (Virtual Private Network), in order to avoid the block (it is a software that disguises your I.P. address, so that your PC appears connected to the United States or Japan even if you are in China). However, the vast majority of the Chinese population uses local social networks. Therefore, it is important to be informed about the Chinese online landscape and its continuous changing laws and increasing restrictions, and to use Chinese social media for implementing web-marketing strategies (Dall'Ara, 2013).

One of the most useful strategies for reaching out to the Chinese market is advertising through search engines. Before travelling abroad, Chinese outbound tourists seek information about attractions, restaurants, hotels, shopping in tourist destinations. Among them, in 2014, about 78% outbound tourists gathered information for their trips on the internet (EU SME centre, 2015) [185]. With nearly 80% of the market share, *Baidu* is by far the most powerful one in the Chinese search engine market. Competition on *Baidu* is clearly quite high, therefore ranking higher can be challenging. *Baidu* SEO (search engine optimization) and SEM (search engine marketing) are significant to increase the visibility of a website. *Baidu* offers a wide range of advertising options for businesses, whose reputation could improve substantially thanks to a better visibility on search engines. Moreover, the knowledge of Chinese language will be required to get the needed information in order to keep in line with Chinese government regulations.

To find out what Chinese tourists are looking for, the best way is to search in the Chinese travel forums and travel websites. For example, at the moment, the most important travel forum is *TuNiu* (途牛 Tú niú) with active forums for discussing travel ideas. Moreover, the biggest names in the Online Travel Agency (OTA) industry in China for 2016 were *CTrip* (携程 xiecheng), *eLong* (艺龙 yìlóng), *Qunar* (去哪 qunar), Fliggy (Alitrip) (飞猪 feizhu), *Mangocity* (芒果网 Mángguǒ wǎng), and *LY.com*.

[185] https://www.google.com/search?q=EU+SME+centre.+Sector+report.+The+tourism+market+in+china%2C+2015.&ie=utf-8&oe=utf-8&client=firefox-b

CHINESE OTAs' ONLINE MARKET SHARE

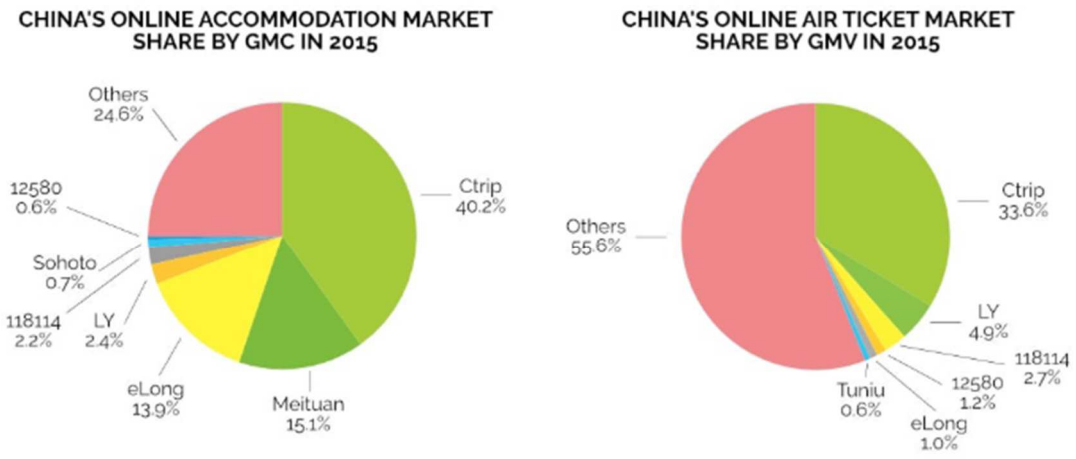

Fig. 5.1. Source: De Gennaro, 2017

Advertising and listing hotels, tours, and other services on these web pages is very effective for attracting Chinese tourists; however, it is not cheap. OTAs are more and more integrated in the Chinese tourism industry. They provide a wide range of services, from online booking of tickets, hotels, car rental to the offer of complete tours and high-quality travel experiences. OTAs have also started to cooperate with tourist destination providers, investing and participating in their planning, design, projects and operations, enlarging their marketing possibilities (Long, 2011).

Another element to consider when dealing with Chinese people is the way of consulting the websites, drastically different from that of the Europeans and Americans. First of all, navigation on a single window is rarely used: usually, a link is always opened in a new navigation window, therefore many windows will be opened as long as the links are clicked. This is because the web pages are very long and rich in content, but also because the Chinese like this way of consultation, that allows them to have at hand all the content that they are reading (Maruma, 2014)[186]. Moreover, the majority of users prefer to consult web directories, i.e. catalogues of the sites subdivided by theme, rather than searching through a real search engine. This is maybe because it is often considered more convenient by users with a low level of confidence with the computer: a facilitated consultation, already divided by subject. Given this, in our eyes of Westerners, this way of consultation would be chaotic (as it can be seen from the following image of a popular Chinese news media), compared to a clean and minimal browser start page like the one of Google (Rajeck, 2016)[187].

[186] https://www.nanjingmarketinggroup.com/blog/5-differences-chinese-western-website-design
[187] https://www.econsultancy.com/blog/67466-why-do-chinese-websites-look-so-busy

CHINA NEWS HOMEPAGE: PERCEIVED AS COMPLICATED BY WESTERN USERS

Fig. 5.2. Source: Cheng; Nielsen, 2016

Continuing as usual will not be an option: adapting the tourist offer.

This consideration rises from the fact that the increasing quantities in travellers will create huge logistical and organisational challenges. In addition, many of the future changes regarding the travel needs described in the previous chapters will produce essential adjustments to respond to these wishes. "Adapt or die" is a mantra in the business environment; therefore, in order not to lose the opportunity to increase the quantity of Chinese tourists travelling to Italy, tourism organisations should analyse the Chinese tourists' interests and customise their offer, making it more recognizable and memorable for tourists. Since Italy by itself has already a recognizable meaning of history, culture and beautiful nature, the tourist offer could be characterized by appealing themes, historical links to China, or could be transformed in a narrative experience (Milillo, 2016/ 2017)[188].

Cooperation is essential to remain competitive

Europe is in competition with other regions, such as the USA or Australia, which have recently climbed the rank of Chinese traveller's appreciation. To be able to survive, the European tourism industry must develop new solutions, innovate and invest, but most of all cooperate to overcome the obstacles. The cooperation must be not only mutual inside the tourism organisations of one's country, but also with companies from other industries, such as telecommunication or transportation and with Chinese partners. Cooperation is one of the most important points, and sometimes one of the most difficult to achieve. In order to do that, it is necessary to implement common projects and institutional actions, engaging the government too. The aim is to spread awareness about the touristic offer of one country and to help create the success of many interconnected businesses.

[188] http://dspace.unive.it/bitstream/handle/10579/11949/965849-1224413.pdf?sequence=2

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APPENDIX

The survey was made in Chinese and then translated into Italian because the client (SAVE Group) is an Italian firm.

#DestinationPersonality research: Venezia "Marco Polo" 2017 [focus audience cinese]

Questa ricerca è frutto di una collaborazione tra

Gruppo SAVE S.p.A. - Aeroporti di Venezia (VCE) e Treviso (TSF) e *b-sm@rk Ltd.*

这项研究是 *Gruppo SAVE S.p.A. - Aeroporti di Venezia (VCE) e Treviso (TSF)* 和 b-sm @ rk（意大利爱尔兰公司）合作的结果。

Compilando questo questionario parteciperà ad una ricerca

sulla percezione di destinazioni Europee e servizi aeroportuali dello scalo Venezia MarcoPolo.

完成这项调查，您将帮助我们开发一个情感营销研究，帮助我们改进 威尼斯泰塞拉 - 馬可·波羅機場(Venezia MarcoPolo)提供的服务

Precisiamo che non esiste una risposta "corretta" o "errata".

没有"正确"或"错误"的答复，每个人都必须自由地回答每个提出的问题。

Il tempo di compilazione previsto è di circa 5-10 minuti.

以下调查只需您 5-8 分钟的时间

Garantiamo l'anonimato delle risposte al questionario e il trattamento dei suoi dati secondo le leggi vigenti sulla privacy.

这是不记名的问卷调查。我们会为您所有的答案和个人信息保密。不会转给第三方。

Cartina dell'Italia con indicazione dell'ubicazione dell'aeroporto Venezia Marco Polo -

《威尼斯泰塞拉 - 馬可·波羅機場》的意大利地图上显示的位置

[DOMANDE "AEROPORTO/DESTINAZIONE"]

1) Ha mai viaggiato in Europa?

你来过欧洲/意大利吗?

a- Si (Passa alla domanda 2)

来过 （去问题 2）

b- No (Passa alla domanda 10)

从来（去问题 10）

DOMANDE RELATIVE A CHI HA GIA' VIAGGIATO IN EUROPA

以下的问题有关那些已经来过欧洲/意大利

2) Ha viaggiato in Europa per…

你来过 欧洲/意大利 因为她的...

Cosa la spinge a viaggiare in Europa? Per favore, esprima quanto è in accordo o disaccordo nell'utilizzare le seguenti attività per descrivere il motivo del suo viaggio in Europa.

是什么原因令您来欧洲/意大利 呢？如果用下面的这些形容词来描述您来过欧洲/意大利的目的，您是否同意或者不同意？

a) Cultura

文化（例如：参观历史古迹/文化名胜，了解新的地方，和当地人接触，了解当地文化，去剧院或者演唱会）

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

b) Ricerca del piacere/Avventura

寻求乐趣 / 圆梦 （例如：猎奇，寻找好玩的事情，脱离日常生活，购物，看球赛）

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

c) Relax

放松 (例如：寻找心灵和身体的放松，和自己关心的人相处，放松心情，享受自然)

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

d) Sport/Natura

运动 / 自然 (例如：和大自然接近，参加拓展运动，各种运动)

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

3) **Quali sono le destinazioni turistiche Europee che preferisce? (massimo 3 scelte)**
欧洲/意大利的旅游目的地中，那些您最喜欢吗？（最大三个选项）

a- Venezia
威尼斯
b- Roma
罗马
c- Paris
巴黎
d- Barcellona
巴塞罗那
e- Milan
米兰
f- Londra
伦敦
g- Moscow
莫斯科
h- Lisbon
里斯本
i- Praga
布拉格
j- Atene
雅典
k- Francoforte
法兰克福

[Altro...][其他...]
(Fonte: Chinese Tourists to Europe Trend Report 2017)

4) **Quale è stata la durata della sua permanenza in Europa?**
您来过欧洲/意大利有多久吗?

a- 1 - 2 giorni
一到两个天

b- 3 - 5 giorni
三到五个天

c- 6 - 8 giorni
六到八个天

d- Più di 8 giorni
八个天以上

e- [Altro…]
Fonte: World Tourism Cities Federation, Ipsos (2014)

5) Quale struttura ricettiva ha utilizzato durante il suo viaggio? (Una sola opzione)
您在您的旅途中使用哪种住宿？ (只一个选项)

a- Hotel di lusso
高层旅馆

b- Hotel 3 stelle
三星级宾馆

c- B&B
住宿加早餐酒店

d- Ostello
宿舍

e- Agriturismo
农家乐

f- Campeggio
露营

g- Camera in affitto
客房出租

h- [Altro…]
[其他...]

6) Con chi ha viaggiato? (Scelga una sola opzione)
您跟谁去旅行了？

a- Da solo/a
独自

b- Con la famiglia
和家人一起

c- Con il partner

和爱人一起

d- Con gli amici
和朋友一起

e- Altro [con possibilità di risposta]
其他

7) Quali compagnie aeree ha utilizzato per viaggiare in Europa? (max 3 scelte)
那些航空公司您已经采用来过欧洲/意大利 吗?

a- AIR CHINA 中国国航

b- CHINA EASTERN AIRLINES 中国东方航空

c- HAINAN AIRLINES海南航空

d- CHINA SOUTHERN AIRLINES 中国南航

e- CATHAY PACIFIC 国泰航空

f- EMIRATES 阿联酋航空

g- QATAR AIRWAYS 卡塔尔航空

h- ETIHAD AIRWAYS 阿提哈德航空

i- ALITALIA 意大利航空

j- LUFTHANSA 德国汉莎航空

k- AIR FRANCE 法国航空

l- KLM 荷兰皇家航空

m- BRITISH AIRWAYS 英国航空

n- ALTRE (specificare) 其它

8) Quali aeroporti Europei ha già utilizzato? (massimo 3 scelte)
您来欧洲的时候，您已经使用欧那些洲机场吗?

[Se l'utente sceglie l'aeroporto di Venezia Marco Polo, passa alla domanda 9. Se l'utente sceglie altri aeroporti, passa alla domanda 10]

a- London Heathrow
伦敦希思罗机场

b- Roma Fiumicino
罗马-菲乌米奇诺《李奥纳多·达文西》国际机场

c- Milano Malpensa

米兰-马尔彭萨机场

d- Paris Charles de Gaulle

巴黎夏爾·戴高樂机场

e- Frankfurt Main

法兰克福国际机场

f- Venezia Marco Polo

威尼斯泰塞拉 - 馬可·波羅機場

g- Vienna Schwechat

维也纳国际机场

h- Helsinky Vantaa

赫尔辛基-万塔机场

i-Mosca Sheremetyevo

谢列梅捷沃国际机场

j-Amsterdam Schiphol

阿姆斯特丹史基浦机场

k- Belgrado Nikola Tesla

尼古拉·特斯拉国际机场

l-Istanbul Ataturk

伊斯坦堡阿塔图尔克机场

m-[Altro...]

[其他...]

(Fonte: European Travel Commission)

9) I servizi dell'Aeroporto Venezia Marco Polo [SE NELLA DOMANDA N.8 E'STATO SCELTO L'AEROPORTO DI VENEZIA MARCO POLO]

威尼斯泰塞拉 - 馬可·波羅機場机场服务

oppure

[Vedi domanda 10] Valuti l'importanza dei seguenti servizi aeroportuali [SE NELLA DOMANDA N.8 SONO STATI SCELTI ALTRI AEROPORTI]

请您对下面机场服务的重要性提供服务的质量的总体评价

A. Fornisca una valutazione generale della qualità dei servizi erogati dall'aeroporto di Venezia Marco Polo

请您对威尼斯泰塞拉 - 馬可·波羅機場提供机场服务的质量的总体评价

Dovrebbe valutare in che misura, da 1 (Poco) a 7 (Molto), gradisce i servizi dell'Aeroporto Venezia Marco Polo.

请您对威尼斯泰塞拉 - 馬可·波羅機場提供机场服务的评价，从 1（非常不满意）到

7（非常满意）

a- Competenza professionale di chi vi ha assistito

空姐的专业能力

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

b- Cortesia di chi vi ha assistito

空姐的礼貌

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

c- Disponibilità ed efficacia delle informazioni (segnaletica)

信息的可得性和有效性（标志）

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

d- Info point

信息点

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

e- Funzionalità / pulizia bagni

卫生间的干净的和工作

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

f- Rete Wifi

WiFi 网络

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

g- Area attesa imbarco

候车室

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

h- Area duty free e shopping

免税商店

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

i- Servizi vip

贵宾服务 （贵宾休息室，贵宾卡等等）

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

j- Security

登记手续

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

k- Area ristoranzione e bar

登记手续

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

l- Terminal aeroporto

登记手续

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

B. Nel complesso, quanto è soddisfatto di aver utilizzato l'Aeroporto Venezia Marco Polo?
总体上说，您对威尼斯泰塞拉 - 馬可·波羅機場的使用满意不满意？

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

[RIMANDO DELLA DOMANDA N.1, IN CASO DI RISPOSTA NEGATIVA] DOMANDE RELATIVE A CHI NON HA MAI VIAGGIATO IN EUROPA

10) Valuti l'importanza dei seguenti servizi aeroportuali
请您对下面机场服务的重要性提供服务的质量的总体评价

Dovrebbe valutare in che misura, da 1 (Poco) a 7 (Molto), i seguenti servizi aeroportuali influiscono sul gradimento dell'aeroporto.

请您对威尼斯泰塞拉 - 馬可·波羅機場提供机场服务的评价，从 1（非常不满意）到 7（非常满意）

a- Competenza professionale di chi vi ha assistito
空姐的专业能力

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

b- Cortesia di chi vi ha assistito
空姐的礼貌

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

c- Disponibilità ed efficacia delle informazioni (segnaletica)

信息的可得性和有效性（标志）

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

d- Info point

信息点

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

e- Funzionalità / pulizia bagni

卫生间的干净的和工作

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

f- Rete Wifi

WiFi 网络

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

g- Area attesa imbarco

候车室

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

h- Area duty free e shopping

免税商店

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

h- Servizi vip

贵宾服务 （贵宾休息室，贵宾卡等等）

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

i- Security

登记手续

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

j- Area ristoranzione e bar

机场餐饮供应

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

k- Terminal aeroporto

候机楼的环境与设计

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

11) Le piacerebbe visitare l'Italia in futuro?

在不远的将来，您想不想参观欧洲/意大利?

a- Si (Passa alla domanda 12)

想

b- No (Passa alla domanda 13)

不想

12) Quale luogo o citta' le piacerebbe visitare in Italia?
您想去意大利哪个地方?

a- Venezia
威尼斯
b- Milano
米兰
c- Roma
罗马
d- Firenze
佛罗伦萨
e- (altro)
(其他)

(Fonte: Oxford Economics for InterContinental® Hotels Group (IHG®)

13) Ci dovrebbe essere secondo lei un volo diretto dalla Cina per Venezia?
您觉得有无必要开通中国到威尼斯的直航？

a- Si
需要
b- No
不需要

14) Quale delle seguenti esperienze di turismo preferisce? [Indicare una o piu' Esperienze di viaggio]
在下面的旅游体验中哪些您更喜欢?

a- D'affari
业务旅游
b- Green e natura
绿色旅游，生态旅游
c- Cultura
文化旅游
d- Sociale
社会旅游
e- Ricreativo

休闲旅游

f- Sportivo

户外旅游

g- Religioso

宗教旅游

h- Salute e benessere

医疗健康旅游

i- Avventura e wild

冒险旅游

l- Backpacking

背包旅游

Fonti: http://www.hotelresortinsider.com/news_story.php?news_id=139465
https://www.slideshare.net/ALTINBAKU/the-different-types-of-tourism

DOMANDE DESTINATION PERSONALITY

15) Venezia e' [-> Analisi Personalità della Destinazione]

意大利/欧洲是…

Se Venezia fosse una persona... Di seguito troverà alcuni tratti della personalità umana che potrebbero essere applicati a questo luogo, indichi quanto è d'accordo o in disaccordo con le seguenti descrizioni.

如果意大利/欧洲是一个人。。。以下有一些可能适用于或可能不适用于这个地方的人格特质。请您标志您同意或不同意的程度以下声明。你应该评估这适用于这个地方的人格特质的程度，即使一个特征比另一个更强烈。

A

a- Affascinante, originale, fantasioso, eccitante, unico, vivace

迷人的，独创的，

1	2	3	4	5	6	7
Per niente d'accordo			Né d'accordo, né contrario			Totalmente d'accordo
非常不同			意无所谓			非常同意

b- Altolocato, incantevole, elegante, raffinato, trendy

信誉的，美艳的，优雅的，精致的，新潮的

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

c- Energico, attivo, dinamico, animato

积极的，活跃的， 戏剧性的， 活泼的

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

d- Affidabile, responsabile, stabile, sincero, onesto

可靠的，尽职尽责的，稳定的，真诚的，诚实的

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

e- Divertente, caloroso, allegro

有趣的，热情的，愉快的

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

f- Duro, rustico, audace

质朴的，粗糙的，胆大的

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

B

a- Responsabile, stabile, con i piedi per terra

负责的, 稳定的, 脚踏实地的

1	2	3	4	5	6	7

Per niente d'accordo Né d'accordo, né contrario Totalmente d'accordo

非常不同 意无所谓 非常同意

b- Attivo, dinamico, innovativo

活跃的, 戏剧性的, 有创新性的

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

c- Aggressivo, audace

激进的, 胆大的

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

d- Semplice, ordinario

简单的, 普通的

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

e- Romantico, sentimentale

浪漫的, 感伤的

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

16) Che emozione le suscita Venezia?

意大利/欧洲对您感到哪个情感吗?

Gioia 开心	Fiducia 信任	Curiosità 好奇	Sorpresa 吃惊	Paura 害怕
Indifferenza 没有区别	Rabbia 生气	Disgusto 恶心	Tristezza 悲伤	Altro 其他

17) Quanto si identifica con Venezia?

意大利/欧洲为您认同多少?

Venezia è affine alla sua personalità? Per favore, indichi il suo grado di accordo o disaccordo con le seguenti affermazioni

意大利/欧洲与您的个性有关吗？请您标志您同意或不同意的程度以下声明

a- Venezia si adatta bene a lei e alla sua personalità

意大利/欧洲适合您和您的个性

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

b- Si identifica con Venezia

意大利/欧洲为您强烈得认同

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

18) Lei è una persona…

你看到自己是...

Di seguito troverà alcuni tratti della personalità umana che potrebbero essere applicati a lei. Indichi il suo grado di accordo o disaccordo con le seguenti descrizioni: dovrebbe valutare in che misura da 1 (Per niente d'accordo) a 7 (Totalmente d'accordo) questi tratti possono essere applicati a lei, anche se ritiene che una caratteristica sia più adatta delle altre.

以下有一些可能适用于或可能不适用于您的人格特质。请您标志您同意或不同意的程度以下声明。你应该评估这适用于您的人格特质的程度，从1（非常不满意）到7（非常满意）。即使一个特征比另一个更强烈。

a- Estroversa, esuberante

外向的，有热情的

1	2	3	4	5	6	7

Per niente d'accordo　　Né d'accordo, né contrario　　Totalmente d'accordo

非常不同　　意无所谓　　非常同意

b- Polemica, litigiosa

善批判的，好争论的

1	2	3	4	5	6	7

Per niente d'accordo　　Né d'accordo, né contrario　　Totalmente d'accordo

非常不同　　意无所谓　　非常同意

c- Affidabile, auto-disciplinata

可靠的，自律的

1	2	3	4	5	6	7

Per niente d'accordo　　Né d'accordo, né contrario　　Totalmente d'accordo

非常不同　　意无所谓　　非常同意

d- Ansiosa, che si agita facilmente

焦虑的，容易烦乱的

1	2	3	4	5	6	7

Per niente d'accordo　　Né d'accordo, né contrario　　Totalmente d'accordo

非常不同　　意无所谓　　非常同意

e- Aperta alle nuove esperienze, con molti interessi

接受新经验的，复杂型的

1	2	3	4	5	6	7

Per niente d'accordo　　Né d'accordo, né contrario　　Totalmente d'accordo

非常不同　　意无所谓　　非常同意

f- Riservata, silenziosa

内向的， 安静的

1	2	3	4	5	6	7

Per niente d'accordo　　Né d'accordo, né contrario　　Totalmente d'accordo

非常不同　　意无所谓　　非常同意

g- Comprensiva, affettuosa

有同情心的，温暖的

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

h- Disorganizzata, distratta

缺乏组织的，粗心大意的

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

i- Tranquilla, emotivamente stabile

平静的，情绪稳定的

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

非常不同 — 意无所谓 — 非常同意

j- Tradizionalista, abitudinaria

行为典型的， 缺乏创造性的

1	2	3	4	5	6	7

Per niente d'accordo — Né d'accordo, né contrario — Totalmente d'accordo

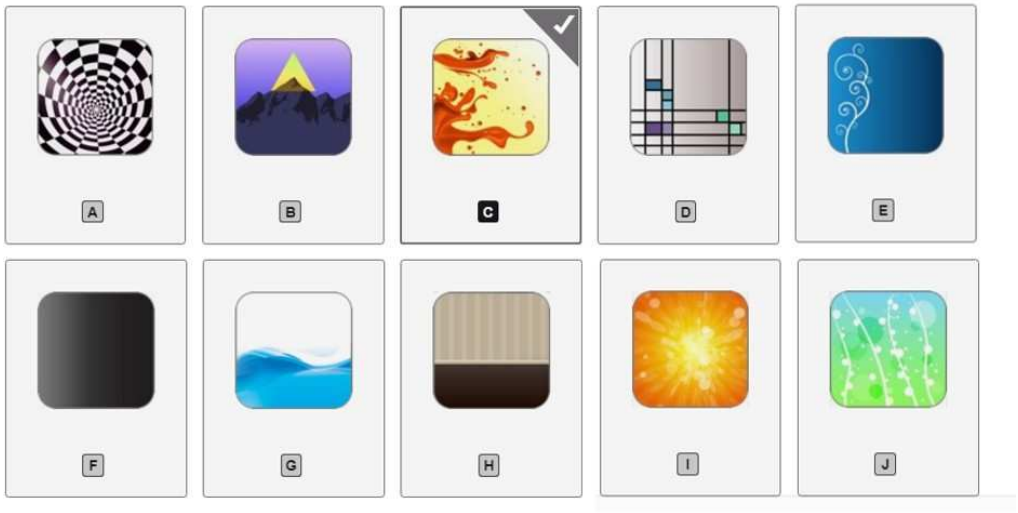
非常不同 — 意无所谓 — 非常同意

19) Scelga l'immagine che meglio rappresenta la sua personalità

选择下列最能表现你性格的图片

Si prenda un momento per guardare le foto sotto riportate, quindi scelga quella che rappresenta al meglio la sua personalità

请看一下这些画面。选择一个最能代表上个问题中，您个性的图像。



DOMANDE SOCIO-DEMOGRAFICHE

Ancora qualche domanda…

关于您的最后一些问题

20) Anno di Nascita

年龄

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21) Sesso

性别

a- Maschio

男性

b- Femmina

女性

c- Altro

其他

22) Nazionalità

国籍

Digiti o selezioni un'opzione

选择一个选项

23) Qual è il suo più alto livello di educazione?
请您选择您最高学历

a- Licenza media o grado di istruzione più basso
初中

b- Diploma scuola superiore (tecnico, professionale, liceo)
高中

c- Laurea Triennale
大学

d- Laurea Specialistica o grado di istruzione più alto (M.Sc., Ph.D.)
硕士

e- Altro (con possibilità di specificare)
其他

24) Qual è il suo stato di occupazione attuale
工作情况

a- Libero professionista/Imprenditore
个体户，自由职业者

b- Dipendente (occupato)
雇员

c- Disoccupato
目前失业

d- Studente/Studentessa
学生

e- Pensionato
退休人员

f- Altro (con possibilità di specificare)
其他

CONCLUSIONE:

剧终:

Grazie per aver completato il questionario ed averci aiutato nella nostra ricerca!

感谢您填写问卷调查，帮助我们在我们的调研!

Gruppo SAVE S.p.A. - Aeroporti di Venezia (VCE) e Treviso (TSF) e *b-sm@rk*

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[Incentivo] TB