

**FINAL REPORT ON WORKSHOPS ON ROUTE AND
PRODUCT DEVELOPMENT FOR THE CHINESE MARKET IN
CENTRAL AND EASTERN EUROPEAN COUNTRIES IN
JANUARY/FEBRUARY 2016**

**Central and Eastern European Countries' Tourism Coordination Centre
Q1 2016**

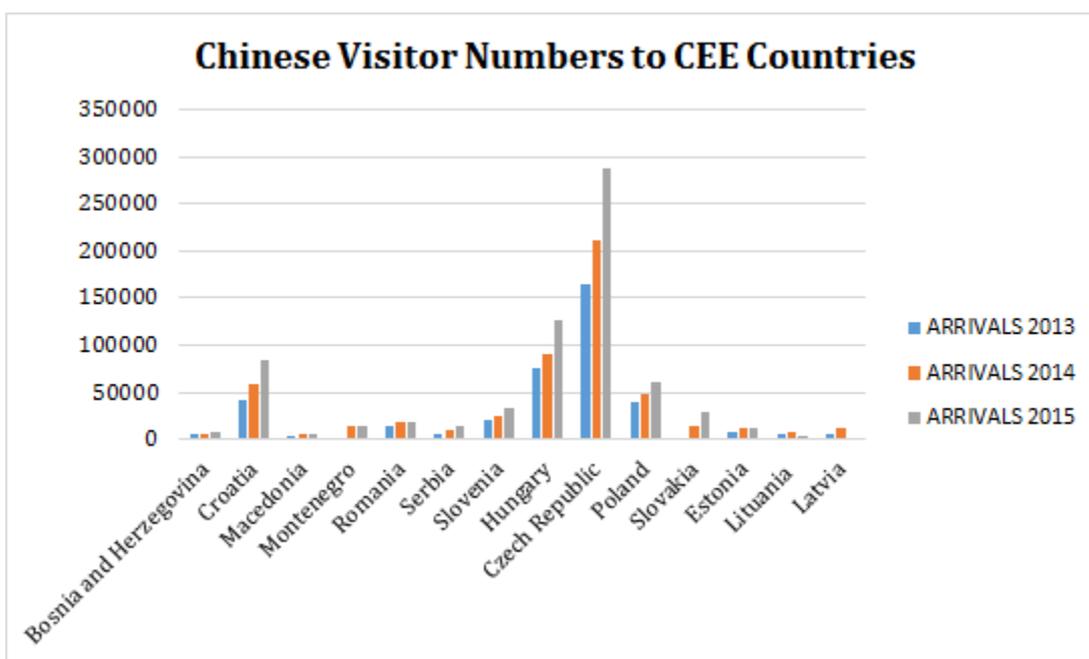


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INTRODUCTION

Established in 2014, the China – Central and Eastern European (CEE) countries' Tourism Coordination Centre (TCC) takes major responsibilities in coordinating tourism development between 16 CEE countries and China. Aiming at catching the wave of the fast growing China outbound tourism, TCC proactively engages 16 CEE countries to promote the CEE region as one single destination to China consumers against increasing competition.

TCC recognises that China outbound tourism is growing at an unprecedented pace both in terms of the number of border crossings and travellers' expenditure. China, with double-digit growth in expenditure every year since 2004, continues to lead global outbound travel, benefitting various destinations in Asia, but also in Europe. For some CEE countries, the increase of total Chinese tourist arrivals in 2015 has had reached record-high, with more than 40% increases in Hungary, Croatia, Serbia and Slovenia.



Source: COTRI (Albania and Bulgaria no data available)

To further support the development especially of cross-border offers for Chinese visitors, TCC organised three regional workshops, facilitated by COTRI China Outbound Tourism Research Institute, based in Hamburg/Germany and Beijing/China. COTRI is the leading independent research institute for the Chinese outbound market. It was started in 2004 by its director Prof. Dr. Wolfgang Georg Arlt FRGS.

The overall objective was capacity building to improve the understanding of Chinese outbound travel market and thus to identify opportunities for suppliers in the CEE region. The workshop also aimed to facilitate participants from each region to develop suitable routes and products on a regional level.

The complexity and difference of each region in terms of the imbalanced tourism development, diversified cultures, languages and the various level of involvement of marketing promotion in the China market were recognised. Therefore, each regional workshop was also provided to participants to address their specific questions and issues and to share experience.

The three workshops took place

- for the Balkan region: January 21, 2016, in Budva/Montenegro
- for the Visegrad4 region: January 27, 2016, in Warsaw/Poland
- for the Baltic region: Feb. 5, 2015 in Riga.

Altogether around 70 participants from at least seven different countries participated. From the government and National tourism organisations of the hosting countries a number of important persons participated.

The first workshop in Budva was facilitated by Dr. Minjuan Deng-Westphal (COTRI Head of Research), the workshops in Warsaw and Riga by Prof. Dr. Wolfgang Georg Arlt FRGS (Director COTRI). For TCC the workshops were attended by Mr. Mihály Aranyossy, Head of International Cooperation, TCC, in Budva and Riga and by Mrs. Zsuzsa Vincze, Coordinator TCC in Warsaw.

The workshops are part of TCC's initiatives to develop suitable tourism routes and products for Chinese travellers within its CEE regional tourism development

coordination strategy. From participants' feedback, all regional workshops were considered highly appropriate and crucial to gain better knowledge of the China market. The example routes proposed on the base of the work for the workshops (see Appendix) illustrate the way of thinking on which future routes development and product adaptation can be based: **Products for the China market should be adapted, bookable, intense, short, 'storified' and offered as modules which can be booked separately or as a full itinerary.**

During the workshops, it became also apparent, that instead of trying to compete with destinations like France or Italy for "me-too" mass-market visitors, the CEE countries should rather concentrate on the so-called 'second-wave' Chinese travellers who come as Fully Independent Travellers (FITs) or semi-self-organised ('Free and Easy') packages buyers. These travellers are more experienced and sophisticated, looking for experiences rather than sightseeing and for "exotic" locations. Included are also families and groups of young couples with their kid as well as the first cohorts of affluent, experienced travellers of 55+ years of age and multi-generational family groups. To attract them, the provision of "value for money" is more important than cheap prices, as the time-poor visitors are investing time, money and effort during their short available travel time and are looking for a 'return on investment'. Instead of developing long and 'comprehensive' routes to cover many countries, themed offers to be completed in shorter time will communicate clearer messages and stronger images to potential Chinese customers.

Overall, participants and organisers from both the private sector and public sector were enthusiastic about the market development, and keen to learn how they can better position themselves. The willingness to work at regional level and the support from host government has also helped to lay positive foundation. The interest was further fueled up by the favourite political relationship between CEE region and China (such as China's "One Belt One Road" initiative and "16+1" strategy) as well as the ongoing improvement of tourism infrastructure in this region, especially with regard to direct flights and ease of visa application.

However, findings from workshops also identified uneven tourism development (in particular when considering targeting the China market) among the three sub-regions. More specifically, the tourism and hospitality industry of each region demonstrated different levels of:

- knowledge and experience in the China market
- clearness of destination image(s)
- variety in market exposure
- willingness to work across borders
- readiness of products to be adapted or to create completely new

Lack of direct flights and difficulty in visa application (particularly for the Balkan region) further compound the possibility to fully take advantage of the fast growing China outbound tourism.

Currently there are four direct flights between China and the CEE region:

Routes	Airlines	Frequency per week
Beijing-Warsaw	LOT	3
Beijing-Budapest	Air China	4
Beijing-Prague	Hainan Airlines	3
Chengdu-Prague	Sichuan Airlines	2

THREE WORKSHOPS

The workshop in **Budva** attracted ten participants mainly from Montenegro. During discussions, most tourism supplier participants indicated that they have not had much experience with the China market, both in terms of servicing tourists and working with the travel trade. Although there was strong interest in increasing their market share, their limited experience put constraints on identifying targeted market, understanding travellers' motivation and thus developing suitable products.

The participants identified a wide range of issues such as:

- difficulty of gaining visas at the Balkan regional level
- lack of a recognisable regional brand
- inadequate Chinese tour guides and restaurants
- absence of direct flights from China
- lack of payment facilities for Chinese tourists

In regards to products, participants suggested a large variety that they considered having reasonable potential for the China market. For example, UNESCO sites and historical heritage, traditional culture, adventure in the 'wild' and nature, wellness, and cooking and dining at special venues. The hospitality of people in Balkan region has been specifically mentioned as a major attraction to the China market.

When participants discussed their concerns and specific issues of how the Balkan region countries can attract more Chinese tourists, their primary questions concentrated on understanding "who these Chinese tourists are" (market segmentation) and "what do they want" (interpreting travel motivation). However, there was limited recognition of what should be included in an action plan to move forward; for example, product adaption, staff training and the development of Chinese language marketing materials and online contents.

There are much less available products and information of the Balkan region compared to other more established European destinations such as Western European or Scandinavian countries. On major Chinese travel websites such as Ctrip, Tuniu and Qunar, Balkan countries have much less available products and destination

information if compared for instance to V4 group countries. Most package tour itineraries are characterised with a short stay in each country and an apparent attempt to cover as many countries as possible in the Balkan region.

The nostalgia theme to visit places of previous communism regime of Yugoslavia and a little bit of nature's offers (e.g. lakes, rose valley, etc.) remains attractive to the segment of elderly Chinese travellers.

In **Warsaw**, 34 participants from organisations including hospitality, travel agency, tourist attraction and university attended the workshop. With the majority of them coming from Poland, there were also participants from Czech Republic and Slovakia.

During discussions it became apparent that it is important to recognise the uneven development of the supply side when TCC coordinates at the CEE regional level. Suitable support and consultation is needed to be tailored to help country thus regional tourism boards can identify specific needs while keeping an overarching tourism promotion and operationalization strategy in mind.

With current direct flights to three out of four V4 countries, participants considered routes to include all V4 group countries and leverage the geographical proximity to Austria, Germany and other more 'classical' European destinations for Chinese travellers. Another advantage was seen in the fact that the region is considered as safe and without terrorism event as well as possessing post-communism heritage that Chinese can associate with their own country.

On most Chinese travel websites and travel agencies' catalogues, V4 groups countries are called as "Eastern European countries". Keywords of destination image of this region include "mystery", "bourgeois" and "Bohemia". Prague and Budapest particularly have gained good market exposure by Chinese popular culture from movies and songs, and have become favored destinations for Chinese "hipster".

The problems for this region are similar to many other destinations: inadequate knowledge of source markets, lack of product adaptation, language barriers at both B2B and B2C levels, employment capability and insufficient leverage of Chinese social media.

In general, current offers of products and services are attractive to potential Chinese travellers, so the key tasks are to further provide practical trainings to suppliers, strengthen marketing communication and operationalize the chain of “available products – actual purchase – affirmative experience”.

In **Riga** 24 participants coming from organisations such as national tourism boards and governmental departments, hospitality, travel agency and tourist attraction, represented all three Baltic States.

Participants at workshop unanimously agreed that the Baltic states should promote all three together to the China market, considering there has been a long history to work together and their geographical proximity. Rather than a region that attracts Chinese visitors by its own, participants considered it is important and feasible to connect the Baltic region with either Finland or Scandinavian countries, which also provide direct flight or cruise access to the China market.

Baltic states are enjoying strong growth in terms of tourist numbers from the China market. However, participants identified that the key issue for this region is not only the quantity of how many Chinese it can attract, but also more a question of how to get ‘better’ Chinese visitors who can stay longer in the Baltics and spend more.

Besides sightseeing products, participants identified the need for the Baltic States to develop themed and experience-based products. Searching for mushrooms in the forest, fishing, ballet summer camp and pottery exchange festival are all some potential ideas to be developed further into sellable and bookable products for authenticity and exotic experience seekers from China, as they all represent traditions

of the local region or in the case of ballet of the Soviet Union heritage. Amber products are No.1 shopping items in this region.

For example, Picking berries and mushrooms is an authentic as old tradition in the region still done by many people. Only a nature guide is needed to facilitate the tour and to sort out the edible mushrooms and the poison ones. The experience can be intensified by providing the possibility to cook with local cooking style afterwards and to integrate the prepared mushrooms into visitors' dinner at a local restaurant to allow visitors tasting what they have picked and enjoying local cuisine.

OUTLOOK

Particularly when considered from a long-term and strategic perspective, these workshops served well in knowledge transfer and empowerment of stakeholders. To move forward, market entry trainings (such as CTW China Tourist Welcome training) and NTO's (national tourism offices) in-house trainings are strongly recommend to regional stakeholders for product adaptation. These trainings need to be tailored and aim to empower regional stakeholders who then are able to identify opportunities of their products and own their initiatives.

Besides proactively seeking better solution to provide easier visa entry for Chinese visitors, governments in CEE countries should also consider supporting policies to better overcome language barriers. For example by supporting the tourism industry employing Chinese speaking staff, opening more Chinese restaurants, training Chinese speaking tour guides and putting up more Chinese signage at major airports, attractions and shopping. All of these measures not only provide short-term benefits to cater for the China market and even better media coverage, but also shows a welcoming gesture that make Chinese visitors feel better towards greater customer satisfaction.

On an operational level, TCC needs to facilitate identifying entities that are willing to operationalise these routes, coordinate among suppliers and sell these routes to Chinese buyers, and eventually issue invoices. In terms of marketing, TCC also needs to work with stakeholders improving online exposure in China both in terms of destination information and products with tools like the "China Travel Academy" WeChat training programme.

For most Chinese potential visitors the CEE countries are rather unknown. This creates a challenge, but also opportunities as Chinese visitors can be guided towards times of the year which are considered "low season" by the traditional markets and to parts of the country which are not considered the main tourism areas, in many cases by establishing events or educational activities there.

To be successful in the Chinese market, traditional ways of offering sightseeing tours via tour operators will have only limited success. The Chinese travellers who are already arriving in most of the CEE countries come to a large extent for experiences and immersion into the local culture rather than just for sightseeing and rather organised by travel clubs, online providers of tourism services or completely self-organised, typically in small groups of 2-8 persons. If offered suitable products, they are willing to buy touristic products and to pay relatively high prices for them if they can be convinced of getting value for money.

These offers are in many cases “niche” products, however in China “niches” are made up of hundreds of thousands of persons, so that a customer number of for instance 5,000 per year for one tourism service products constitutes obviously less than one permille of the total Chinese outbound market, but constitutes for the local destination and the service provider a significant number of customers.

A positive aspect which is often forgotten is the fact that in most CEE countries English is widely spoken at least in the major cities and that in any case the visitors are not expected to understand the local language (unlike France or Germany for instance).

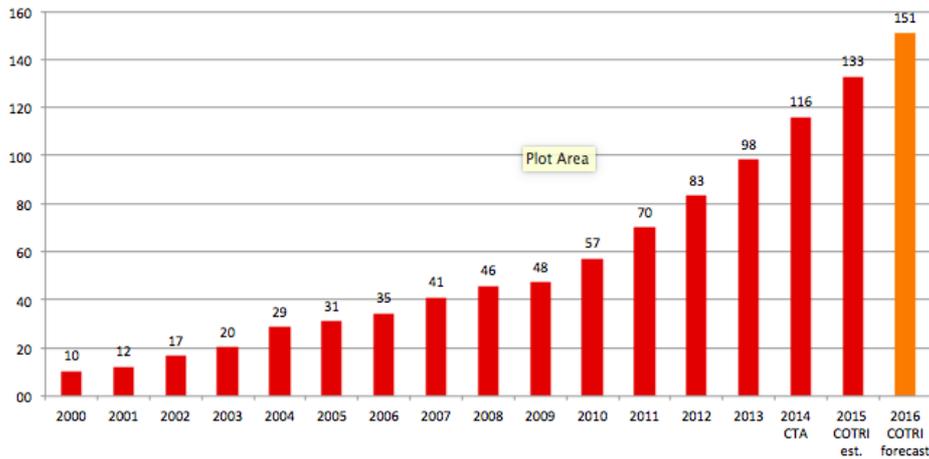
Furthermore CEE countries are currently between two extremes: On the one hand they are perceived as safer than Western European countries in terms of the danger of terrorist attacks, on the other hand they are perceived in some cases as having to deal with refugee transit movements. Hopefully the first factor can be used for positively influencing the number of Chinese arrivals, while for the refugee problem a solution will have to be found in one way or another soon, so that this negative influence will disappear.

2015 has been the “China-CEE Tourism Year” and there was the event of “Ten Thousands Chinese Touring Eastern Europe”. 2016 started with new direct flight between Prague and Chengdu and President Xi Jinping’s visit. Further strong growth of Chinese arrivals to the CEE region will definitely be possible if supported by an active and intelligent engagement with the market.

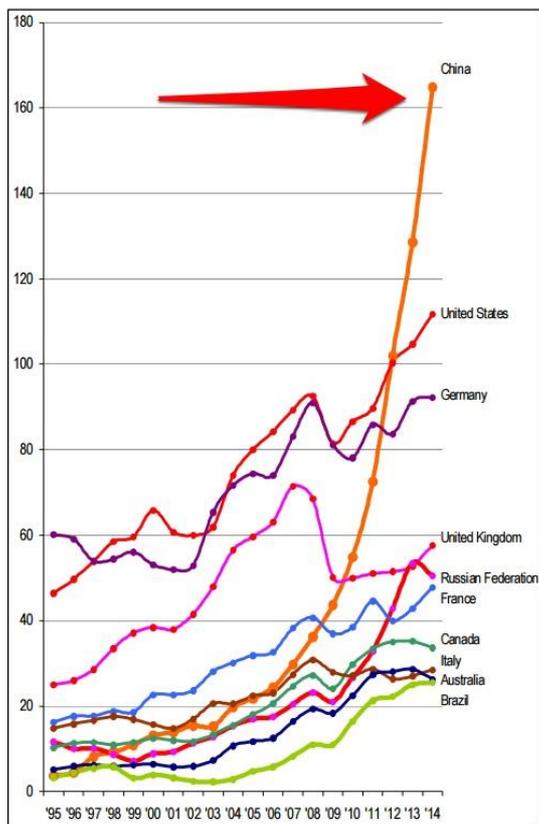
APPENDIX

The Growth of the China Outbound Tourism Market (Number of Boarder Crossing and Expenditure)

Border crossings from Mainland China in millions



World and regions: Outbound Tourism International Tourism Expenditure (US\$ billion)



Source: World Tourism Organization (UNWTO) ©

Sample Itineraries of Balkan Region on Major Chinese Websites

Sample 1: Provided by Ctrip. Com - the most typical itineraries on the market, 80%

Day 1 Shenzhen - Hong Kong - Istanbul - Thessaloniki
Day 2 Thessaloniki, city center
Day 3 Thessaloniki - Rila Monastery - Sofia
Day 4 Sofia - Skopje, Sfia Sveta Nedelya Cathedral,
Day 5 Skopje - Ohrid - Tirana, Stone Bridge, Lake Ohrid
Day 6 Tirana - Skadar Lake - Podgorica, Tirana city center
Day 7 Podgorica - Zlatibor, Sightseeing
Day 8 Zlatibor - Belgrade, Tito's tomb, sightseeing
Day 9 Belgrade - Sarajevo, Old Town, Latin Bridge
Day 10 Sarajevo - Mostar - Dubrovnik, Mostar Old Bridge, Dubrovnik Wall
Day 11 Dubrovnik - Split, Dubrovnik Beach, Monastery, Split Old Town
Day 12 Split - The Historic City of Trogir - The Krka National Park - Vodice,
Day 13 Vodice - Plitvice Lakes National Park - Zagreb
Day 14 Zagreb - Lake Bled - Ljubljana, Sightseeing in Zagreb
Day 15 Ljubljana - Istanbul - Hong Kong, Sightseeing in Ljubljana
Day 16 Hong Kong – ShenZhen

Sample 2: Provided by CITS China International Travel Service

Day 1 Shanghai - Istanbul
Day 2 Istanbul - Athens, Acropolis
Day 3 Athens - Meteora, Meteora Monastery
Day 4 Meteora - Thessaloniki, Thessaloniki Archaeological museum, White Tower
Day 5 Thessaloniki - Skopje - Mavrovo, Skopje Old Bazaar
Day 6 Mavrovo - Ohrid - Tirana, Lake Ohrid, Tirana City center
Day 7 Tirana - Kruja - Kolasin, Kruja Old town
Day 8 Kolasin - Durmitor - Kotor - Budva, Durmitor National Park, Town Kotor, Budva City center
Day 9 Budva - Podgorica - Istanbul
Day 10 Istanbul - Shanghai

Sample 3: Provided by Ctrip. Com

Day 1 Beijing - Budapest
Day 2 Budapest, Halászbástya and Sightseeing
Day 3 Budapest - Tihany - Lake Balaton, Festetics Palace
Day 4 Lake Balaton - Zagreb, Zagreb city center
Day 5 Zagreb - Plitvice, Plitvice Lake National Park
Day 6 Plitvice - Opatija, Opatija Lungomare
Day 7 Opatija - Postojna Cave - Ljubljana, Ljubljana sightseeing
Day 8 Ljubljana - Bled - Salzburg, Lake Bled
Day 9 Salzburg - Salzkammergut Lake District - Vienne, Hofburg Palace
Day 10 Vienna - Budapest - Beijing
Day 11 Beijing

Sample Itineraries of V4 Group Countries on Major Chinese Websites

Sample 1: Provided by Qunar. Com

Day 1 Beijing-Warsaw (city sightseeing)
Day 2 Warsaw - Cracow (Jagiellonian University, Kraków Cloth Hall, Wieliczka Salt Mine)
Day 3 Cracow - Wrocław (Rynek-Cathedral Island)
Day 4 Wrocław -Prague
Prague Castle-Little Quarter
Day 5 Prague –Pilsen – Crumlaw (city sightseeing, Crumlaw Castle, etc.)
Day 6 Crumlaw - Holasovice Historical Village – Bratislava (city sightseeing)
Day 7 Bratislava - Lake Balaton - Budapest (Dinner at Danube River Cruise)
Day 8 Budapest (city sightseeing)
Day 9 Budapest- Warsaw-Beijing
Day 10 Beijing

Sample 2: Provided by CITS China International Travel Service

Day 1 Guangzhou/Shanghai-Frankfurt
Day 2 Frankfurt- Nuremberg (city sightseeing)
Day 3 Nuremberg – Munich – Fussen (city sightseeing, BMW Museum)
Day 4 Fussen - Neuschwanstein Castle- Salzburg (Mirabell Palace, Mozartplatz, Mozart Residence)
Day 5 Salzburg- Crumlaw (city sightseeing)
Day 6 Crumlaw - Vienna (city sightseeing)
Day 7 Vienna-Budapest (city sightseeing)
Day 8 Budapest – Bratislava – Prague (Bratislava Castle, Slowakisches National Theater, Old City Hall)
Day 9 Prague-Shanghai

Sample 3: Provided by Ctrip.com

Day 1 Beijing –Warsaw (city sightseeing)
Day 2 Warsaw (city sightseeing)- Cracow Warsaw
Day 3 Cracow- Bratislava
Visit Cracow Old Town
Day 4 Bratislava-Budapest (city sightseeing)
Day 5 Budapest-Vienna (city sightseeing)
Day 6 Vienna- Budweis (city sightseeing)
Day 7 Budweis- Crumlaw (Castle) -Prague
Day 8 Prague (city sightseeing)
Day 9 Prague –Warsaw – Beijing
Day 10 Beijing

Sample Itineraries of Balkan Region on Major Chinese Websites

Sample 1: Provided by Qunar.com

Day 1 Beijing - Helsinki

Day 2 Helsinki – Tallinn, city tour – Tallinn

Day 3 Tallinn (city sightseeing) – Parnu (Red Tower)- Riga

Day 4 Riga (city sightseeing) – Siauliai – Kaunas, The Hill of Crosses

Day 5 Kaunas (city sightseeing) – Vilnius (University of Vilnius)

Day 6 Vilnius – Trakai (Trakai Island Castle) – Vilnius (city sightseeing)

Day 7 Vilnius – Helsinki – Beijing

Day 8 Beijing

Sample 2: Provided by Caissa.com

Day 1 Beijing – Helsinki – Vilnius

Day 2 Vilnius (city sightseeing: Amber Museum Gallery) – Trakai (Trakai Island Castle) – Vilnius (city sightseeing)

Day 3 Vilnius- Siauliai-Riga (The Hill of Crosses)

Day 4 Riga (Latvian National Opera and Ballet, the Freedom Monument, etc.)

Day 5 Riga - Sigulda (Gutmanis Cave-Turaida castle)

Day 6 Sigulda – Tartu – Viru (University of Tartu, Church, etc.)

Day 7 Viru – Tallinn (city sightseeing)

Day 8 Tallinn – Helsinki (city sightseeing)

Day 9 Helsinki-Beijing

Day 10 Beijing

Sample 3: Provided by Ctrip.com

Day 1 Shanghai- Moscow (city sightseeing, Red Square, etc.)

Day 2 Moscow- Sergiyev Posad –Moscow - St Petersburg

Day 3 St Petersburg

Day 4 St Petersburg

Day 5 St Petersburg-Tallinn (Open Air Museum, etc.)

Day 6 Tallinn – Tartu (Alexander Nevsky Cathedral-Dome Church and city sightseeing)

Day 7 Tartu - Parnu (Tartu city sightseeing, University of Tartu)

Day 8 Parnu (beach walk) -Riga (city sightseeing, Red Tower etc.)

Day 9 Riga –Vilnius (St Peter's Church, The Freedom Monument, The Three Brothers' House, Powder Tower, Open-air Museum of Latvia, etc.)

Day 10 Vilnius (city sightseeing, Amber Museum Gallery, University of Vilnius, Pilies Gatve-Gedimino Prospektas)

Day 11 Vilnius- Moscow- Shanghai

Sample Itineraries developed during the workshops

Balkan region:

Example 1: “Games of Adriatic Sea/山与海之歌” – Slovenia, Croatia and Montenegro (Ljubljana – Rastoke - Plitvice Lakes National Park – Split – Dubrovnik – Kotor – Budva – Podgorica)

Featuring attractions of sunny blue sky and Adriatic Sea, exotic orange roofs, ‘Kings Landing’, salamanders in Postojna Cave, fairytale waterfalls and mills, European “Nine Valley” and old European towns. This product has elements of the nature, slow tourism and movie themes targeting young to medium age, affluent and semi-organised travellers.

Example 2: “Back to the nature, travel like a local” – Romania and Bulgaria (Sofia – Plovdiv – Hissar – Nessebar – Veliko Turnovo – Veliko Turnovo – Ramniku Valcea – Sibiu – Sighisoara – Brasov – Bran Castle – Bucharest)

Featuring attractions and leisure activities of Rose Valley, rose spa and massage, Black Sea, Bulgarian cuisine and cooking lessons with bio-products from local herbal gardens, legend of vampire, castle, bike riding through Romanian villages, beer house, UNESCO sites and little bit history of Communism regime targeting families, younger couples and colleagues.

V4 region

Example 1: “Royal treatment in Central Europe”: Czech, Austria, Slovakia and Hungary (Prague – Kalvary Vary – Pilsen – Budweis – Krumlov – Vienna – Bratislava – Heviz – Budapest).

Featuring attractions of magnificent castles, fairy tale town in the Renaissance time, Bohemian towns, spa and thermal lake, Budweis, Pilsen and river cruise, this product has elements of culture and architecture for sightseeing and wellness and health tourism. It is suitable to target young, affluent and semi-organised travelers.

Example 2: “The different European cuisine, tradition and history”: Poland, Slovakia and Hungary (Warsaw – Cracow – Wieliczka – Oświęcim – Vysoke Tarty – Bratislava – Heviz – Eger Region – Budapest)

Featuring attractions and sight including the house of Madame Curie, concert of Chopin’s music, Wieliczka Salt Mine, Auschwitz Concentration Camp, electronic boat on Lake Balaton, spa, Goulash meal with village horsemanship show, Eger Bikaver, Noble wine at Hungarian traditional dance show banquet. Elements in this route has been revealed by the product’s name and it is suitable to target middle to elderly aged groups.

Baltic region

Example 1: “Discovery amber’s hometown – lung cleanse trip at the Baltics” – Poland, Lithuania, Latvia and Estonia (Warsaw – Vilnius – Trakia Lake – Kaunas – Klaipeda – Palanga – Riga – Parnu – Tallinn)

Featuring attractions of concert of Chopin music, the Baltic Sea, amber factory and demonstration workshop, castles (pink castle, Turaida Castle, etc.), the Hill of Crosses, Rundale Palace and rose garden, old European towns, this route is provided within an environment of the purest air, white sandy and healthy mineral beach, national park forest that can cleanse lungs. It has elements of the nature, culture, “Europeans’ vacation” targeting self-drive, young to medium age, affluent and semi-organised travellers.

Example 2: “Playing like your child at the Baltics” – Tallinn, Riga and Vilnius.

Features a range of family activities that both children and adults can participate such as picking up mushroom while encountering wild forest animals, ballet camp with certifications, wind tunnel, pottery workshop, fishing, cookie baking at café, etc. This product provides the opportunity for parents and children to spend time and share activities together with unique cultural elements, targeting families with friends and colleagues, summer season and small groups.

In all examples the itinerary should be offered and priced both as a total programme for organised tours and as 1-2 day modules to be booked by FITs before or during the travels in the region. Especially for the modules it is important to have elements which cannot be easily organised by travellers themselves, as for instance the cooking lessons, guided bike tours etc.

SWOT ANALYSIS FOR CEE COUNTRIES

Strengths

S

- Direct flights to V4 region
- Schengen visa for several CEE countries
- Positive or neutral destination image
- Potential to develop fitting products (nature, culture, authenticity, diversity)
- Geographical proximity to major destinations (Finland, Austria, Germany, Italy, Greece)
- Communist regimes heritage
- Long traditions as tourism regions

Weakness

W

- Lack of knowledge and understanding of Chinese source market segments
- Lack of direct flights to Baltic and Balkan regions
- Visa issues for several CEE countries
- Language barriers at both B2B & B2C levels
- Need to strengthening online booking and social media exposure
- Shortage in Chinese guides and restaurants
- Lack of clear positioning and goals

Opportunities

O

- Further growing flight capacity
- Market penetration in 1st and 2nd tier cities
- Visits of major Chinese politicians
- Perception as safe destinations
- Continuous growth of China tourism, especially to smaller destinations
- "One belt, one road" initiative
- Regional cooperation (TCC)

Threats

T

- Increasing competition from other destinations on the Chinese outbound market (cheaper & closer: Japan, Thailand, Australia etc., similar offer but stronger marketing: Iceland, Norway)
- Uncertainty about Europe's asylum seeker crisis
- Continuation of single-country marketing and competition instead of cooperation