

BaltMet Promo

Report on the Qualitative Study

Prepared for:

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Information About the Study



Background and goals of the study



Warsaw has joined an international project called BaltMet Promo, co-financed by European Union as a Programme for Baltic Region for years 2007-2013. A goal of the touristic project is a promotion of Baltic Region (lifestyle of its habitants) among tourists from Japan.

This qualitative study was commissioned in relation to this Programme and was done among Japanese women living in Warsaw, Berlin, Riga, Vilnius, Tallinn and St. Petersburg and visiting these cities as tourists. A goal of the study was to talk to Japanese women to get their view, feelings and opinion about attractiveness of each of the city.

Methodology



Research Method:	Individual in-Depth Interview (IDI), all conducted in English
Location:	Warsaw, Berlin, Sankt Petersburg, Tallinn, Vilnius, Riga
Number of IDI:	30 (5 for each city)
Realised:	12th of August - 12th of September, 2011
Recruitment Criteria:	<ul style="list-style-type: none">• Japanese citizens aged 20-50• Women (26) and men (4: Tallinn, Riga, Vilnius, Berlin - 1 man in each city)• Sample split into (for each city):<ul style="list-style-type: none">• 3 IDI: with Japanese residents living in the city for a minimum of 1 year• 2 IDI: with Japanese tourists



Riga



Riga

- first reactions -



tourists

- Very cheap compared to Japan
- Slower life compared to Japan
- A lot of tourists on the streets
- Very clean, no garbage
- No beggars - different to other European countries
- Honest people - positive experience with help from locals

positive



- Small city - great size, convenient to explore; not too big not too small; compact city - quick to get from airport, to get anywhere, to walk around
- Safe city
- Beauty, beautiful buildings; very good city for sightseeing;



negative

residents



- Site included in UNESCO heritage sites
- Very nice historical buildings, a lot of stone; very historical, medieval character
- General: a nice mood; relaxed atmosphere
- Special attributes: high towers, churches, panorama, specific skyline
- Similar to Budapest and Krakow - liked for their historical character
- Looking like a Western city
- ➔ Good for a max 3 days visit
- ➔ Similar to other Hanseatic cities
- People are not that friendly - they help but they are not that open
- Rather complicated system of streets

Absolutely dominating positive top-of-mind reactions, with focus on beauty and compact size. Positive emotions are also connected with safety.

Riga

- likes and positive experiences -



Connected with CITY STYLE/ APPEARANCE

- Small size of the city – everything in walking distance
- General beauty – a lot to see and discover
- Cleanness
- Very western European character
- Safety, no fear connected with being on streets
- Quite a lot of parks/ green/ especially: flowers
- A lot of churches - feel of a European history
- You can see a lot of sky – open view, a feeling of „air”
- Well balanced city – balance between old and new (i.e. it is traditional, but not out of date)
- Good orientation within the city
- Closeness to sea, openness to sea

Connected with POSSIBILITIES/ OFFER

- Good cuisine – European style and very affordable prices
- Good prices, everything is relatively cheap – e.g. spa, ballet
- Good selection of restaurants/ bars
- Enough shopping places

Connected with PEOPLE/ MENTALITY

- Easiness of communication in English
- Kindness of people

Definitely the key area of positive experiences - a good combination of beauty (in traditional European style which is very tempting for Japanese women) and convenience to experience it (great size, walking distance, a feeling of modern country which is safe and very „Western”)

Focus on positive experiences connected with eating/ cuisine as well as with general level of prices - it is a cheap city for Japanese people

Experiences in contacts with locals were relatively weak and not frequent



Connected with **PEOPLE/ MENTALITY**

- Shy people, monotonous faces, no facial expression visible on streets
- Not enough smile, people are not open; difficult to make friends
- Is not cheerful city

Connected with **CITY/ OFFER**

- Lack of willingness to entertain tourists – i.e. not a lot going on with regards to local history and tradition (i.e. not enough souvenirs, not enough tradition „living” on streets)
- Relatively difficult to get (no direct flight)
- Easy to get lost – irregular streets with not very visible signs on them
- Slightly expensive food/ restaurants compared to other Baltic states
- Bad roads, not convenient to drive
- Limited variety of products in stores – i.e. it is not a shopping city

Definitely the key negative experience - both for tourists and residents. Japanese women are sensitive to the way they are treated - such kind of lack of openness is problematic and embarrassed as it underlines a feeling of being a stranger (which they feel strongly anyway)

All the other negative experiences appeared to be rather marginal - i.e. they were much more a kind of inconvenience rather than strong negative emotions

Riga

- compared to expectations -



tourists

➤ Worries about rather aggressive attitude of people (compared to Japanese) - a lot of conflicts in the region

• **Lack of detailed knowledge and clear expectations**

➤ A fear of „Soviet Union” character - grey, sad, depressing, not modern, rural rather than urban, unsafe

- Pretty old town, friendly and open people
- Traditional food
- More relaxed, slower life than in Japan, a kind of living in the past
- Darkness, cold weather
- Afraid of too small city with nothing to do
- Afraid of too heavy, fatty food - to control weight
- Afraid of ability to communicate in English

A lot of positive surprise!

- Much safer
- Much more modern/ Western
- Much more vivid
- More beautiful than expected (well preserved history)
- Smaller than expected - more „cosy”

... and some disappointments

- More graffiti/ greyness (early spring)
- Worse possibilities to communicate in English
- Not enough openness, cheerfulness of people



residents

Coming to Riga is a kind of visiting something really unknown and unexplored. A fear of post-soviet character appeared to be still strong and must be regarded as important thread for successful promotion of the city for Japanese tourists. But generally - this is a very positively surprising place!

Riga

- reasons for coming -



More „active” - connected with Riga specifically

- Music - interest in choir, Bach

More „passive” - Riga as not the main purpose

- Change of plans - switched from Germany (because of e.coli bacteria)
- To have a safe vacation (compared to South Europe)
- To go to cooler part of Europe (compared to Japan)
- To taste a different cuisine, specific for Europe
- Uniqueness of Baltic region - not to meet other Japanese tourists, to have something unique to tell to friends after come back
- Baltic region as the last region in Europe not visited yet
- Generally Europe for being prestigious character for Japanese people - history, culture of Europe is fashionable in Japan
- As a part of Scandinavia - Finland and others countries are the main reasons for coming (because of design)

It is very significant that choice of Riga was in fact a choice of this part of Europe - Riga itself was not a main purpose. It was regarded as a part of the whole region which was attractive for its unique Northern & European character. It comes from limited knowledge about Riga but also shows a kind of attitude of Japanese tourists - to see as much as possible within the whole region.

Riga

- a touristic place? -



YES!



... but

BEAUTY

- Buildings, streets, generally entire Old Town - because it's beautiful and authentic
- A lot of sightseeing places, a lot of interesting buildings to see

SIZE

- Everything in a walking distance
- Everything to be seen within 2 days
- No need to hurry, a feeling of „complete visit” in a short time (*great weekend trip*)

OFFER

- Good selection of hotels and hostels of good quality and at affordable prices
- Good food and good selection of local alcohol/ beer

MOOD

- A lot of foreigners - vivid atmosphere - so Japanese person can feel good, as one of other strangers
- Some unused potential - not enough merchandise, a feeling of „not being welcomed” as a tourist (e.g. *beautiful streets are only streets, it seems like they do not want to organise shops, events connected with this*) (resident)
- Not that energetic and vivid out of a season (resident)
- Not much of information (English website only)
- Poor promotion (e.g. lack of connection Latvia - Japan) (*They should use 5 Japanese football players playing in Skonto Riga; great idea with Kimono contest*) (resident)
- Lack of famous single object/ building to be a strong reason for coming
- Expensive and time consuming travel (e.g. compared to Hawaii or Korea)



Suitable model of a tourist

- Aged 40+
- Having more money and more time to spend on holidays (a long trip!)
- Focused on tradition, history
- Also looking for relaxation and leisure
- Someone who had never been to Europe before - it is similar to other European countries, nothing really new
- For those who are tired with big capitals (older tourists)
- Not only tourists but also students (cheap, interesting, a chance to learn language and „live European way”)



Unsuitable model of a tourist

- Young, shoppers, looking for clubbing

What about female tourist specifically?

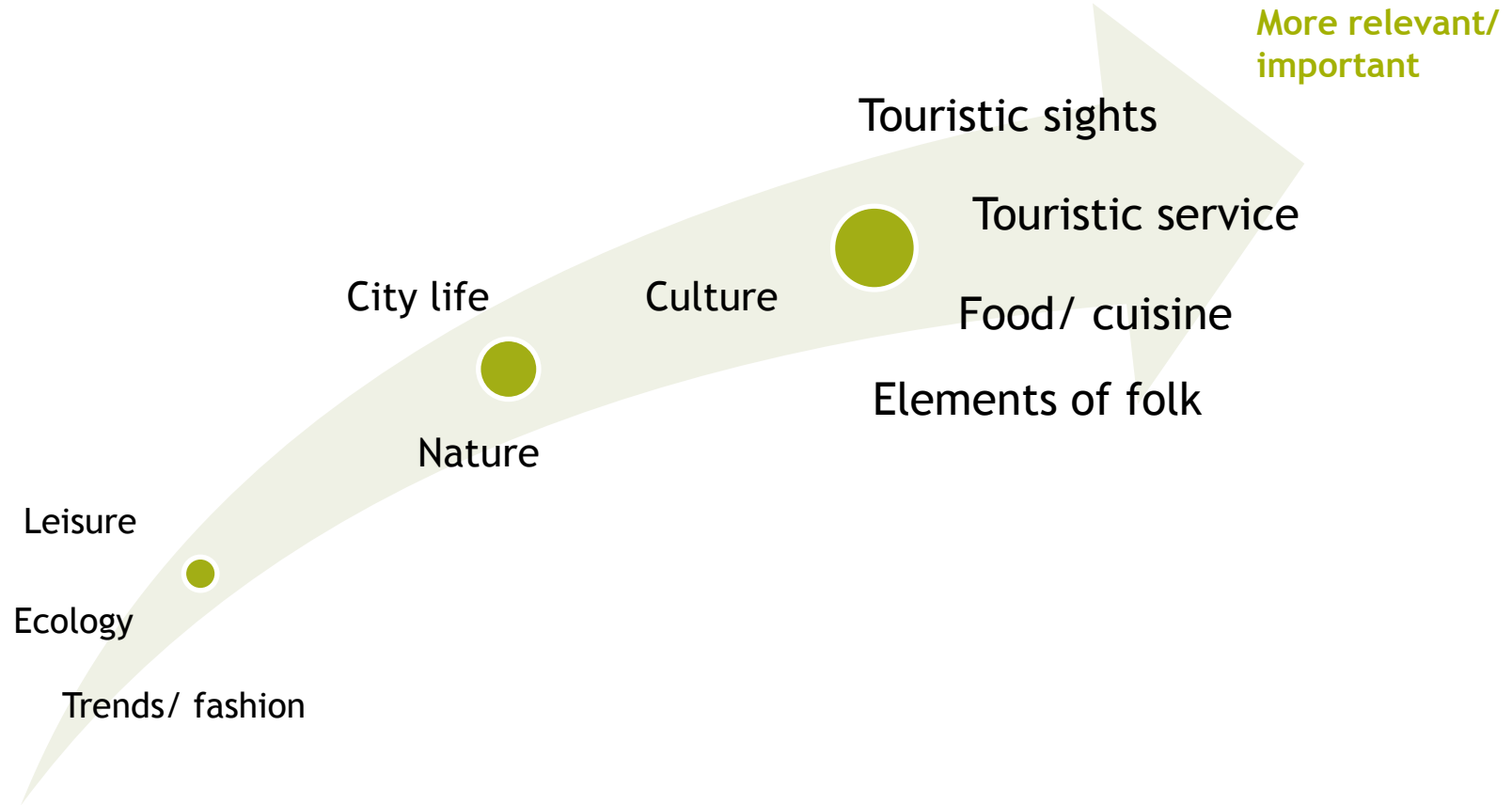
- YES! - safe, very cute (*a bit like fairy-tale*), a chance to buy some nice small souvenirs (amber, linen)

Riga is definitely perceived as a place for older tourists for a few reasons - it demands more time to get here, but it can offer a relaxing, calm time which is desired by more mature tourists. It is much more about tradition and relaxation than fun.

Cute appearance of Old Town combined with safety and souvenir shopping make it attractive specifically for women

Riga

- exploration of lifestyle categories -



Riga

- more relevant lifestyle categories -



Food/ cuisine

- Very good, always liked very much after trial
- European style - as expected; this is what they were looking for
- Very different to Japanese - which is an advantage
- Nice selection of beer and other alcohol (Riga balsam)
- Not that fatty and heavy as sometimes expected
- But generally too fat and greasy for everyday eating (resident)

Definitely a strong point of a visit, especially when the visit is short

Elements of folk

- Nothing specific noticed (after few hours of visit)
- Very positive opinion among residents:
 - Nice small markets in park - traditional clothes, small gadgets
 - Generally well developed, recognisable as Latvian (traditional clothes, linen)
 - Nice products made with amber

High potential, but should be more visible for tourists (more shops, more events)

Touristic service

- Definitely proper level of service in such places like hotels, tourist information, airport, taxi
- A proper kind of service in restaurants
- Good taxi system - safe, not expensive
- But orientation in the city could be slightly improved (signs)

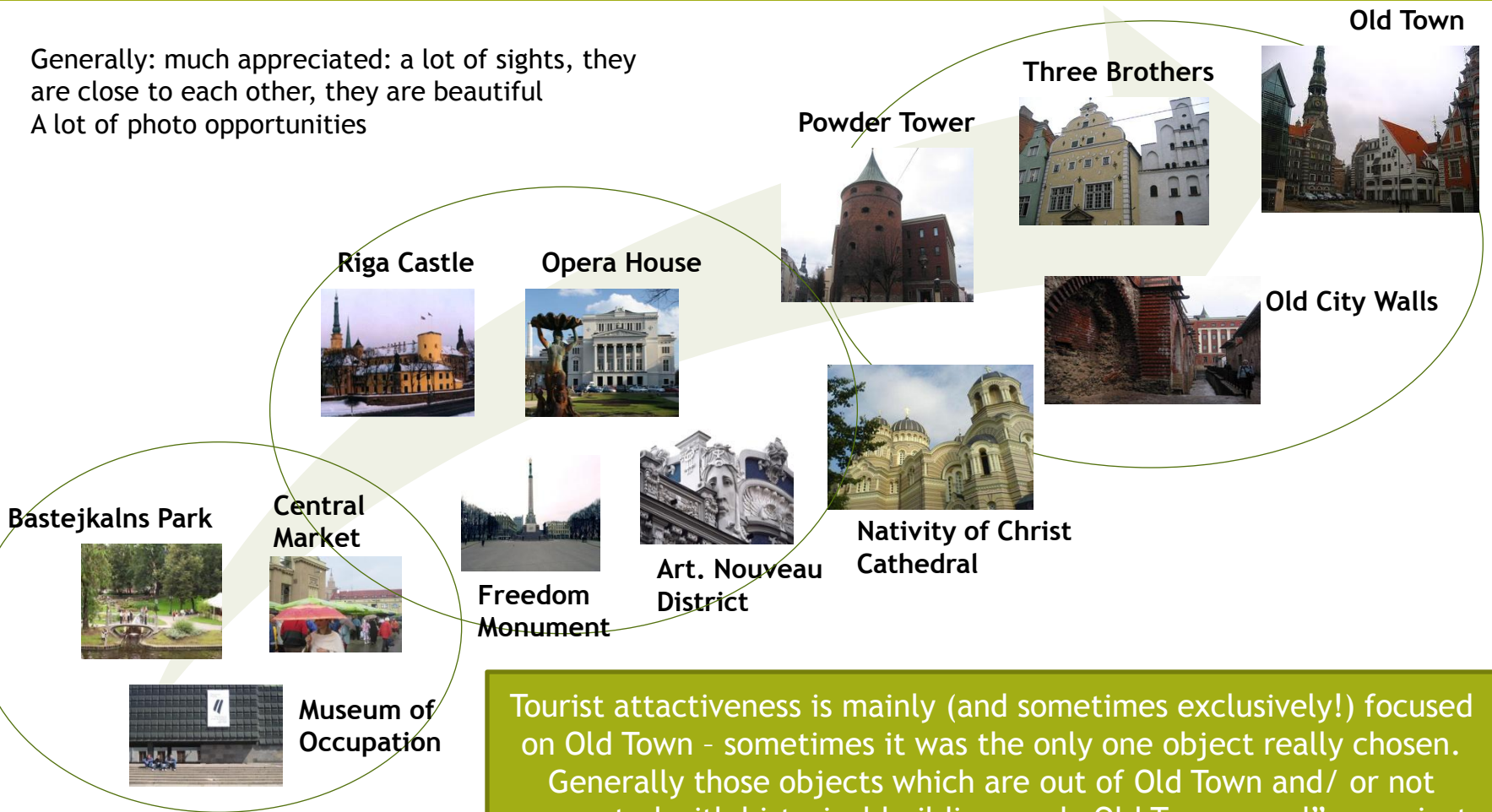
Definitely satisfying level for demanding Japanese people who are very sensitive to service quality

Riga

- focus on touristic sights -



Generally: much appreciated: a lot of sights, they are close to each other, they are beautiful
A lot of photo opportunities



Tourist attractiveness is mainly (and sometimes exclusively!) focused on Old Town - sometimes it was the only one object really chosen. Generally those objects which are out of Old Town and/ or not connected with historical buildings and „Old Town mood” were just less attractive/ ignored/ unknown.

Riga

- undefined lifestyle categories -



Culture

- Frequently: no idea about any events
- Some events connected with choir music; Elina Garanca (a singer)
- Riga 810th anniversary
- But residents knew and liked more:
 - A lot of festivals from June to October
 - A lot on countryside
 - Good and cheap opera and ballet
 - Good music festival (jazz and classical)
 - A mix of Russian and European culture

Culture in Riga is something that does not come to mind easily - it demands knowledge and involvement.

City life

- A feeling of active, energetic people - mainly tourists in the Old Town
- People looking happy, smiling - mainly tourists
- A lot of tourists make the place colourful and interesting
- But lack of real entertainment connected with big cities
- And frequently local people are perceived as quite sad and shy

A city life/ atmosphere was created by tourists - and it was fine. But there is a visible kind of *local sadness* in the city image.

Nature

- Nothing specific, frequently no opinion
- Nice *river* close to Opera House (Pilsetas kanal)
- Standard kind of parks, worse than e.g. in London
- But nice when there are small markets in parks;
- Parks good for running and walking
- A lot of green, birds

Frequently nature was not attention-grabbing for tourists, but also - there was not any lack of it in the image of the city.

Riga

- less relevant lifestyle categories -



Leisure

- Frequently: lack of opinion about it
- Not enough time to check it
- But dominating feeling: no such offer catching the eye
- Better among residents:
 - Closeness of suburbia
 - Enough offer, but not a big selection either
 - Nice affordable spa

Lack of anything specific to offer according to respondents + lack of interest from tourists (taking a short time of stay under consideration)

Ecology

- Frequently: lack of opinion about it
- Some positive feelings:
 - Not polluted, clean city
 - Clean parks + a lot of green
- But some negative as well:
 - No sorting of garbage
- Generally: not important for a Japanese tourist

No real problems, but not an argument to be used - lack of focus on this aspect.

Trends/ fashion

- No trends/ designers catching eye, even if someone heard about them
- People look „normal” - neither trendy nor old-fashioned
- Much more of tradition visible

Absolutely lack of any element in respondent's eyes that could position Riga as a place of trends/ fashion. Tradition is absolutely dominating.

Riga

- attributes and arguments -



Attributes chosen...

to be communicated

- ❑ **ARCHITECTURE**
 - definitely beauty of the Old Town as unique and attractive
- ❑ **SAFETY**
 - very positive surprise vs negative expectations
- ❑ **HUMAN SCALE**
 - very convenient, compact and relaxing kind of a city

- ❑ **LOCATION & CONNECTIONS**
 - close to Helsinki
 - but distant as a single destination
 - rather long journey for a short Japanese holidays
- ❑ **CULTURE**
 - music, festivals
 - but it demands time and knowledge
 - lack of really world famous events/ names
- ❑ **QUALITY OF SERVICE**
 - proper, acceptable
 - but nothing unique for Riga
- ❑ **NATURE AND SEA**
 - enough of it, but nothing really unique for Riga

not to be communicated

- ❑ **HISTORY**
 - ❑ lack of interest towards history
 - ❑ complicated history of the region
- ❑ **DESIGN**
 - ❑ nothing visible
- ❑ **UNIQUE CHARACTER**
 - ❑ no real uniqueness - similar to other Baltic States as well as to other European cities
- ❑ **INNOVATIVE CHARACTER**
 - ❑ no innovations visible

Riga

- comments -



Riga appeared to evoke mostly positive reactions and feelings among Japanese tourists and residents.

It was a frequent very visible positive surprise vs expectations - that it is so beautiful, so safe and „Western” as well as so convenient and easy for a tourist who is going to spend a limited time in the city.

Compact size and touristic quality of Old Town must be regarded as a strength of Riga - it provides a feeling of „complete journey” made within one or two days - and this one or two days are filled with something Japanese tourists are definitely looking for - living an „old European” style, touching the heritage and past. A stay is also even more positive thanks to a positive feelings connected with general level of service, local cuisine as well as some elements of folk/ tradition - of they are found.

On the other hand - especially compared to Tallinn - Riga has some visible „touch” of sadness, lack of vivid character and it goes definitely in the area of relaxation than fun as far as the city image is concerned. It all makes it a good place for mature tourist rather than young one.

It is also visible that the city itself does not provide enough arguments to come - to attract more of Japanese tourists it should use the fact it is close to Helsinki, it is a part of a bigger region which is worthy seeing.



Tallinn



Tallinn

- first reactions -



tourists

- A lot of people, a lot of tourists
- Beautiful view from the church and from the hill (Toompea)
- Many souvenirs shops
- Good service in restaurants

positive



- Very old city
- Very beautiful city - really medieval in a very aesthetical way; a lot of colours
- Very nice food



negative

residents



- A good atmosphere - people do not work too much, they live slower, not in a big hurry - balanced life; a cosy city
- Atmosphere of **enjoying life**
- A great city to walk, no need to drive or run
- A lot of modernity - WiFi, modern buildings
- Balanced - old times and modernity
- A lot of shopping possibilities
- People are changing, society is rapidly developing
- A city **full of culture**
- A city which **does not get boring**

Absolutely positive, even enthusiastic reactions both from tourists and residents.
No drawbacks mentioned, regardless length of stay in Tallinn!

Tallinn

- likes and positive experiences -



Connected with CITY STYLE/ APPEARANCE

- Beauty of buildings
- A real „medieval” character - even more than expected; very authentic and old; not „commercialised” too much
- Colours of buildings and mood reminds of nice European cities – Venice
- Nice big park (Kadrioru park)
- Not that big, everything is in walking distance, unique tiny Old Town; everything reachable in a couple of minutes
- Narrow streets – one can get lost but it is easy to find again
- A lot of photo opportunities
- Very clean city
- Openness to sea – a feeling of freedom (bigger than e.g. in Prague or Bratislava regarded as somehow similar)
- Genera; feeling of *the best atmosphere within the region* – the most vivid, colourful, optimistic, modern

Connected with MODERNITY (residents only)

- A lot of modernity which makes life easy (shopping, Wi-Fi, modern ID cards instead of passport, a possibility to do a lot of things via internet – like voting)
- Tallinn perceived as more modern than Riga and Vilnius
- No problems with communication in English

A lot of very positive opinion about the way Tallinn looks and is organised - this is definitely the most important area of advantages and positive attributes.

It is mainly a combination of beauty (sometimes really surprised) and convenience to experience it. Openness to sea is also interesting as close to Japanese people

This element appeared to be attractive and valuable for residents - tourists had no time to feel it. But this is very characteristic for Tallinn and Estonia in general and it makes it quite unique.

Tallinn

- likes and positive experiences (cont'd)



Connected with OFFER

- A lot of souvenirs shops
- General good selection of shops – the best shopping within the region
- A lot of possibilities to eat and drink – good quality and affordable prices (especially compared to Helsinki) + a lot of places having nice character and style
- A chance to have a relax in park (accessible, large)
- Good quality and taste of food
- A lot of things are very affordable – public transport
- The best food within the region
- No need to wait/ book for tourist attractions

Tallinn is perceived as offering a lot, especially for a short-time visitor - some basic needs connected with trying local cuisine and buying souvenirs seemed well met by local offer. Kadrioru park appeared to be a nice offer - making it not only a „Old Town place”, but offering a rest in nature

Connected with PEOPLE/ MENTALITY

- Visible feeling of safety (e.g. compared to Amsterdam)
- A lot of people – a real „touristic / holidays mood”
- At the same time – people are rather calm and not over-expressive; a proper „kind if quietness”
- Well-balanced life and relaxed people – they take their time, take care of free time, spent with friends and family
- Local people enjoy traditional events (e.g. girls dressed in local traditional clothes)

Atmosphere created by people was very attractive both for tourists (colourful international crowd) and for residents (a feeling of slow-pace life). For both - Tallinn seems attractive thanks to a feeling of relaxed lifestyle, very opposite to Japanese

Tallinn

- dislikes and negative experiences -



Connected with **CITY**

- Unclear system of public transportation on an airport
- Not enough information about the city on the airport
- Not enough free accessible public toilets
- Some problems with shopping for clothes – there are too big sizes for Japanese women
- Lack of interesting museums

All these disadvantages appeared to be rather weak compared to many advantages of Tallinn, however some of them were a bit annoying

Connected with **PEOPLE/ MENTALITY**

- Japanese are perceived as real strangers – problems with acceptance of a Japanese person trying to speak Estonian
- Sometimes: a little but too quiet, shy people

Rather minor objectives, definitely not causing any dislike of the city

Tallinn

- compared to expectations -



tourists

- Nature - in general Estonia
- Beautiful and safe country (Estonia)
- Rather not modern, traditional character

- Lack of detailed knowledge and very precise expectations

- Lack of modernity
- Poor shopping
- Former Soviet Union country - sad, grey, depressing, beggars

A lot of
positive
surprise!

- Much more beautiful
- Extremely convenient (small)
- Much more modern
- Much more colourful, well-preserved, clean
- Much more open for foreigners
- Nothing from Soviet Union



residents

Even if knowledge of Tallinn and Estonia was not that big, first contact with Tallinn was always a positive surprise or confirmation of a positive attitudes towards the city.

No negative surprise were mentioned neither by tourists nor residents.

Tallinn

- reasons for coming -



More „active” - connected with Tallinn specifically

- Recommendation from a member of family - stressing beauty of the city
- Recommendation of a teacher - willingness to live in a country in transition

More „passive” - Tallinn as not the main purpose

- Helsinki as the main purpose or longer European trip was a main purpose (Paris - d’Orsay museum)
- Tallinn as a place which appeared to be „close to Helsinki” - not a long trip to take
- Visiting friends who studies here

Compared to Riga - in case of Tallinn some more „active decision” appeared, however still it is more or less a matter of accident and reasons other than the city itself which attract tourists or residents from Japan. It is worthy stressing again - like in case of Riga - that there is no strong single reason (like a famous object or just fame of the city/ country itself) for coming to Tallinn. It is more reasonable to think about work on attractiveness of the whole region, with Helsinki being a „window” open to Japanese tourists.

Tallinn

- a touristic place? -



YES!



BEAUTY

- Beautiful old buildings, a lot of colours, a *real fairy-tale mood*
- Surprisingly old, a *real medieval*
- A chance to touch nature (parks, close suburbia)

SIZE

- Great size of the Old Town to walk
- Everything in walking distance for a 1-2-days stay

MOOD

- A lot of tourists, a „positive crowd”
- Touristic places seem „natural”, not commercialised too much
- Tradition is accompanied with modernity - internet access, shopping

LOCATION

- Easy and quick access from Helsinki

LOCAL CULTURE

- Quite well developed folk culture - handcrafts

OTHER REASONS

- Listed by UNESCO
- Baruto Kaito - well-known sumo wrestler born in Estonia

... but

- There is no city website in Japanese
- There are a lot of unused potential and possibilities - e.g. some workshops in making bread, knitting, handling wool, making chocolate, etc
- There is a need to look for a slightly different kind of a souvenirs - not only clothes (too big, too heavy), but something smaller and specific for Tallinn (amber?)

Tallinn

- a touristic place? -



Suitable model of a tourist

- Rather mature tourist
- Someone who like history, old European style, architecture
- Someone looking for a relaxation calmness
- Someone having more money - to travel to this part of Europe
- Also young, interested in modernity and design (resident only)
- A person who wants to find something unique - i.e. not the most famous „typical” and „mainstream” European cities (younger, independent, with a group of friends)



Unsuitable model of a tourist

- Younger, looking for parties, holidays on the beach
- A person looking for luxurious shopping/ brands

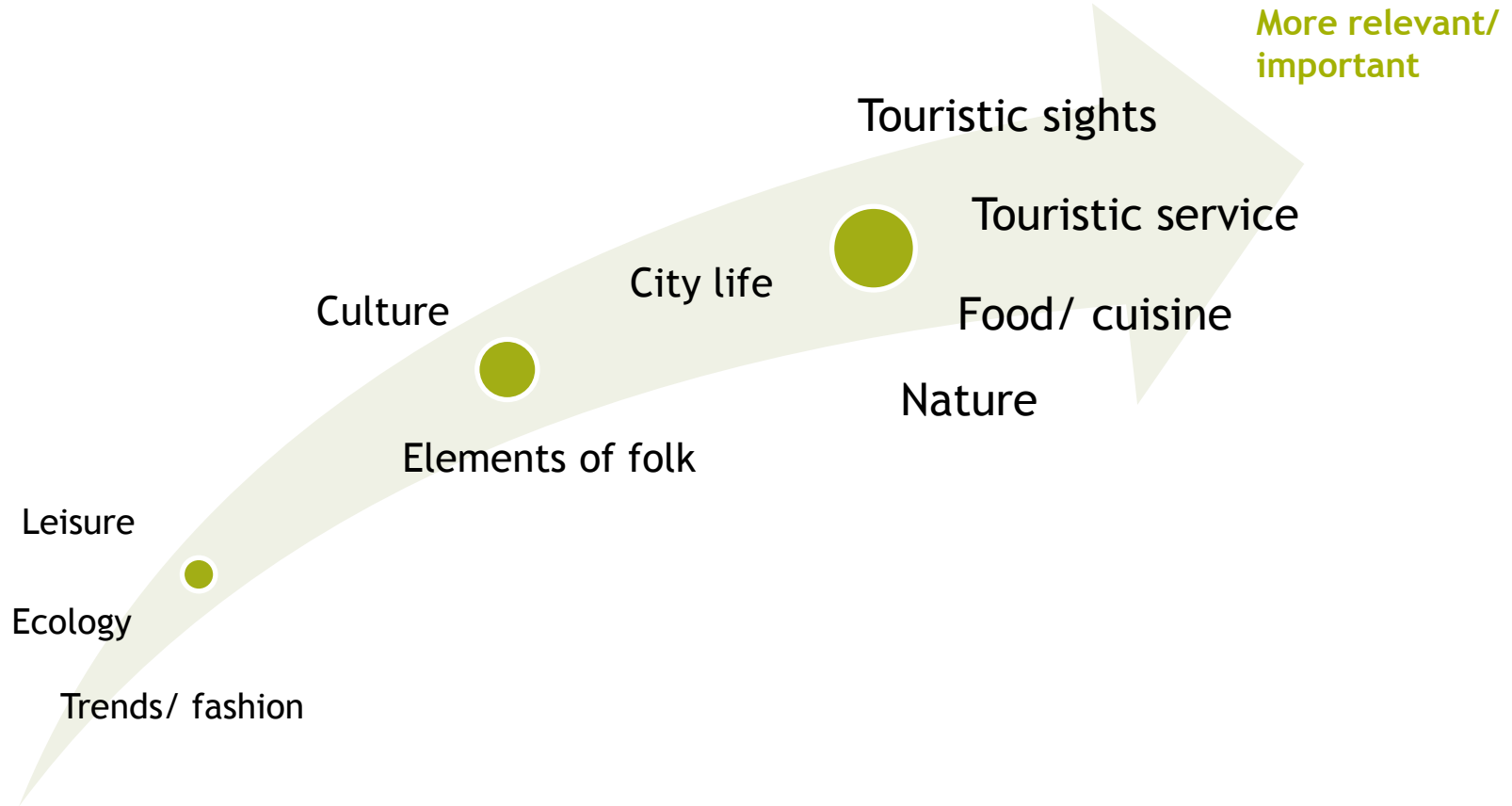
What about female tourist specifically?

- Definitely suitable because of being safe
- A lot of possibilities to buy local design small souvenirs - fashion accessories, stationery, notes, pens (expensive in Japan)
- Extreme beauty of Old Town (*female fairy-tale style*) and style of many cafes - decorative
- Popularity of spa

Tallinn is definitely perceived as a very good touristic place, frequently the best in the region. It has a quite universal character thanks to a balance between tradition and modernity. A beauty/ aesthetics makes it also very proper for female tourists specifically - probably the most in the region again.

Tallinn

- exploration of lifestyle categories -



Less relevant/
important

More relevant/
important

Tallinn

- more relevant lifestyle categories -



Food/ cuisine

- Always regarded as tasty after trial
- Very in line with what Japanese tourists demand - different than in Japan
- Usually perceived as well balanced - European, yet not too heavy
- A possibility to buy good ingredients for Japanese food
- Very good quality for much lower price than e.g. in Finland

As in the case of Riga - this cuisine is a very good element of a typical short-time stay of a Japanese tourist

Nature

- Very attractive - openness to sea
- Estonian people value nature
- Attractive Kadrioru Park - accessible and very nice by itself
- more important for residents than for tourists

Closeness to sea and openness to sea makes Tallinn quite unique - and this uniqueness is very attractive specifically for Japanese

Touristic service

- No problems with service in all kinds of places, no complains
- No problems with communicating in English
- Crisis in 2008 made local people employed in service even work better

A must for Japanese people who pay attention on service very much. Modernity means really „European class” service

Tallinn

- focus on touristic sights -



A number of touristic sights perceived as very high, but not too high at the same time - a comfort of seeing everything interesting within 1-2 days

Alexander Nevsky Cathedral



St Catherine's Passage



Town Hall Square



Town Wall



Cathedral of St Mary the Virgin



Tompea Castle



St. Olav's Church and Tower



Freedom Square



Danish King's Garden



Maiden Tower



Song Festival Grounds



Tourist attention is definitely focused on Old Town - on places with the highest touristic atmosphere, with a strong medieval character, some unique attributes (the Tower) or giving a great sightseeing and photo opportunity.

Tallinn

- undefined lifestyle categories -



Culture

- Attractive motif of artistic paintings on walls
- Quite a lot going on during winter time - ballet
- Culture focused on folk and Old Town - i.e. nothing really catchy from other areas of arts or culture

City life

- Good atmosphere on the streets
- But one-sided: very touristic
- Real city life is rather far from the Old Town
- Friendliness and quietness of people - acceptable by Japanese tourists
- But nothing really attention-grabbing or unique - it is just a *typical holiday European atmosphere*

Elements of folk

- Attractive traditional clothes and fabrics
- More of folk than in other cities from the region
- Quite a lot of souvenir stores

Culture is perceived as rather one-sided; tradition is important, but there was a lack of anything else than this

Very good, positive atmosphere, but it is not that unique to make it a real argument for coming as such

Folk is visible and nice to have - it is a natural source of souvenirs which are important for Japanese tourists

Tallinn

- less relevant lifestyle categories -



Leisure

- Enough offer for a tourist
- Closeness to nature helps
- Balanced, calm lifestyle helps as well
- But tourists are not interested - lack of time
- Not enough typical Japanese leisure offers - like yoga

Out of interest of tourists. But even for residents - it is just OK., nothing really catchy or specific.

Ecology

- Not a big topic for tourists
- Cleanness of the city suggests being close to nature

A minor topic for a tourist. But cleanness of the city is absolutely enough to make her/ him satisfied.

Trends/ fashion

- Attractive elements of folk
- But no real new/ up-to-date fashion visible

Even if Tallinn and Estonia are perceived as modern, it is not connected with fashion or design. Here - tradition is absolutely dominating.

Tallinn

- attributes and arguments -



Attributes chosen...

to be communicated

- ❑ **LOCATION & CONNECTIONS**
 - ❑ close to Helsinki
 - ❑ Short trip on a ferry, which is attractive in itself
- ❑ **ARCHITECTURE**
 - very attractive - very „fairy-tale”, colourful
 - at the same time: very old and authentic
- ❑ **SAFETY**
 - Definitely yes - good atmosphere, a lot of tourists
- ❑ **HUMAN SCALE**
 - Great size and high easiness of walking around the city and watching all sights

- ❑ **CULTURE**
 - A lot of traditional - rural - folk which is very nice
 - But lack of wider offer (museums, festivals)
- ❑ **QUALITY OF SERVICE**
 - Highly acceptable, well meeting demands and needs of Japanese tourist
 - But this is a standard and a must-have attribute
- ❑ **NATURE AND SEA**
 - Very nice openness to sea
 - But a lot of nature is out of Tallinn - no time to experience it
- ❑ **UNIQUE CHARACTER**
 - Uniqueness of such a compact city
 - But this is just an interesting thing, not a big reason to come

not to be communicated

- ❑ **HISTORY**
 - ❑ rather not interesting - what remains from the past is interesting (Old Town)
- ❑ **DESIGN**
 - ❑ Not that modern and visible like e.g. in Helsinki
- ❑ **INNOVATIVE CHARACTER**
 - ❑ Definitely dominated by tradition and medieval character
 - ❑ Modernity in terms of life (IT, Internet) makes it convenient, but not perceived as really innovative city

Tallinn

- comments -



Reactions to Tallinn in general can be regarded as the most commonly and the most visibly positive or even enthusiastic compared to all other cities taken under consideration in the project. This enthusiastic opinion was coming both from tourists and residents - and it can be described as a reaction to a good combination of tradition and modernity. Tradition obviously seems to be more relevant for tourists who were very impressed by the Old Town (the most medieval one), while modernity is more perceived and valued by residents. Such a combination or balance seem to be the main unique attribute of Tallinn.

It is characteristic that Tallinn was usually regarded as the most attractive city out of the 3 capitals of Baltic States by those who visited all of them.

Similarly to Riga, Tallinn seems to be meet specific demands of Japanese tourists well - it is very compact (walking distance, possible to be seen in 1-2 days, good level of service, surprisingly good shopping) and at the same time it offers additional benefit - a short and nice ferry trip from Helsinki. This attribute can be definitely used in communication directed to potential Japanese tourists.

Tallinn seems also a great reason to attract female Japanese tourists to the region - with its colourful, *faity-tale* style and better presented local design (souvenirs) it is a good material for a „leading” city for all 3 capitals of Baltic States.



Vilnius



Vilnius

- first reactions -



tourists

- Beautiful buildings, beautiful city
- A lot of Christianity - churches, weddings
- Very old - a feeling of *theme park or Disneyland* of old Europe
- A lot of weddings - surprise
- Real people, real life, not commercialised
- A *moderate* character - well balanced, not too big, not too small, not too old

positive



negative

residents



- Small
- Organic
- Unique
- Quite complicated system of streets - it is easy to get lost and to explore and find new places
- Authentic
- Not „globalised”, not commercialised as e.g. Copenhagen or Stockholm
- A lot of *spirit* - e.g. on a Hill of Three Crosses
- Relaxing atmosphere
- ➔ Similar architecture to Kraków
- Lack of really strong offer for tourists - e.g. some nice good quality small local souvenirs
- Lack of shopping opportunities

Definitely dominating first reactions, especially among tourists who did not expect much and were very positively surprised.

Vilnius

- likes and positive experiences -



Connected with CITY STYLE/ APPEARANCE

- Beauty of buildings
- A lot of churches – very visible Christianity
- Catholic character – interesting, similar to Spain
- Cheap city – everything is affordable
- A lot of nature, trees, forests – e.g. visible from the airplane creates a promise of natural, healthy lifestyle; a lot of possibilities to have a rest in forests, parks
- Less known than other cities of the region – a feeling of „exclusivity”
- Less „touristic” stores and markets – a feeling of real life
- Very unique airport – looking like a house, within the city
- Unique food – different than in other cities in the region („a potato culture”)
- Similar to Warsaw in terms of a possibility to observe real life/ not a commercialised tourism
- Small size of the city – everything is in walking distance
- However still it is safe and convenient to use taxi
- It is easy to find a way walking – the city does not make one to get lost or if lost – it could be a nice exploration
- General easiness of payments
- Usually very beautiful sunny summer

Very attractive combination of attributes which make Vilnius quite unique in its catholic, authentic, calm, natural character.

Life and touristic visit appeared to be easy and pleasant - Vilnius offered a nice atmosphere and convenience in living/ sightseeing.

Vilnius

- likes and positive experiences -



Connected with CATHOLICISM

- Generally dominated by churches which are interesting as such
- Very *spiritual* city – not artificial, not commercialised

Connected with PEOPLE

- Very friendly habitants
- A possibility to communicate in English with younger people
- Very relaxed atmosphere – a feeling of slower life
- A kind of „shy and discrete” character and lifestyle of people makes it similar to Japanese lifestyle

Catholic character seems unique - it is interesting from a point of view of Japanese tourists, but it also influences general image of the city - as appropriate for older tourists

Interesting similarity to the style of life of Japanese people - they felt „in tune” with local way of expressing, with a kind of openness to others (not exaggerated like in Southern Europe)

Vilnius

- dislikes and negative experiences -



Connected with **CITY**

- Not the best state of pavements, sometimes difficult to walk (in winter)
- Some lack of English information on railway station and also within the city (signs, tourist info) and in restaurants (menu)
- Less knowledge about the city – it is more demanding for a tourist (to check everything regarding logistics)
- Not an easy access to the city – not frequent connections, low number of flights, lack of direct flight
- Lack of official taxi from the airport
- Slightly too fast drivers on streets
- Dirty toilet at the airport
- Lack of really interesting museum (like Warsaw Uprising museum)

Connected with **PEOPLE/ MENTALITY**

- Visible domination of older people – lack of feeling of youth
- Some problems with the service in restaurants (resident) – not punctual
- Communicating in English with older people
- A little bit shy people
- Quite problematic to set contacts with local people – Japanese feel real strangers

Vilnius - compared to other capitals of Baltic States - relatively suffered from the „smallest openness to tourists” - lack of English (or Japanese!) information was relatively biggest here.

Some functional drawbacks connected with infrastructure were noticed as well - taxi, toilets, public transport. It was not a big criticism, but rather a small disappointment compared to many advantages of visiting Vilnius

Small, but noticed inconvenience is connected with a feeling of „the least touristical city” - relatively lower openness of people; but again - it was not a big criticism

Vilnius

- compared to expectations -



tourists

- Basketball - a chance to experience it
- Afraid of organisation, connections (tight schedule)

- Very limited knowledge about Vilnius, no clear expectations
- A fear of post-Soviet character - ugly, dirty, unsafe

- A typical Nordic city - clean and modern
- „Standard EU” city
- Afraid of safety
- Afraid of communication - local language is difficult

A lot of positive surprise!

- Less modern than expected, but this tradition is nice, unique
- Beautiful people - tall, handsome
- More Eastern and Western - this is unique
- Exciting culture of basketball

... but some negative as well...

- Drunk people close to railway station
- Quite sad, grey and very freezing during winter
- Low level of life of local people



residents

Vilnius - along other cities - had not a strong, defined image, going there is like discovering unknown. But from a point of view of tourists - definitely positive surprise is dominating!

Vilnius

- reasons for coming -



More „active” - connected with Vilnius specifically

- An interest in Lithuania caused by Chiune Sugihara

More „passive” - Vilnius as not the main purpose

- Invited by a professor taking part in the conference in the region
- Visiting Tallinn and getting known that Vilnius has some connection

Lack of knowledge and image and as a result: lack of clear reason to come was very visible.

Again - it makes much more sense to think about Vilnius as a part of a longer trip within the region rather than single city to be visited.

Interesting case of Chiune Sugihara - it shows a potential of looking for people who set connections between local country/ history and Japan.

Vilnius

- a touristic place? -



YES!



BEAUTY

- General beauty of the city, attractive scenery

SIZE

- Small size - everything in walking distance

MOOD

- Friendliness of habitants/ people on streets

OFFER

- Very good food and a large variety of local beer
- Nicely-looking, friendly small hotels; good price and good standards of hotels
- A lot of possibilities to relax in nature, even within the city
- Free entrance to churches

UNIQUENESS

- Very different than many other typical mainstream touristic cities in Europe - more natural, authentic, calm
- A chance to be a „pioneering tourist”
- KGB museum - very surprising and unique for Japanese people
- Some unknown possibilities for Japanese people - like mushroom picking

OTHER REASONS

- Not many Japanese tourists - a feeling of exclusivity
- Chiune Sugihara
- Attractive if in a „set of cities” within one tour - Helsinki, Tallinn, Riga, Vilnius
- Listed by UNESCO

A very good mix of attributes for a nice 1-2-days stay. Interesting number of attributes that say about uniqueness of Vilnius.

Vilnius

- a touristic place? -



YES!



... but

- There is a need to improve connections, mainly between Tallinn and Vilnius
- Also direct flights from Japan would be helpful
- Not very rich pages about Vilnius in Japanese guides - more information and more photos are connected with Riga and Tallinn; also - local booklet has been changed into Chinese
- There is a lack of any attractive local souvenir which would be very specific for Vilnius - a symbol of Vilnius to be bought as a reminder of the trip; current linen products are not designed in a modern way
- Lack of attractive museum and other indoor attractions in case of a bad weather
- Information about events is usually in local language only or in English on the website only
- Not enough Japanese speaking tour guides
- Showers instead of baths in majority of hotels

Important part of the criticism shows much more a feeling of unused touristic potential of Vilnius rather than disadvantages of the city itself. Better communication and more openness to tourists (more of local events communicated to tourists, better quality souvenirs) are a kind of most important advices, coming from Japanese residents.

Vilnius

- a touristic place? -



Suitable model of a tourist

- A tourist oriented for culture and for exploring different cultures and lifestyles
- Someone focused on exploration of real people's life
- Older couples - relaxation, calmness, traditional souvenirs
- Rather a group tourism - to avoid problems with lack of English information
- But also young backpackers - looking for exploration of real life of others and who get used to mainstream European cities
- Experienced tourist - who knows Europe and English language



Unsuitable model of a tourist

- A person looking for a high shelf shopping
- someone looking for a high culture (Opera is closed during summer; generally offer is limited)
- A person looking for an *energetic city* - like New York

What about female tourist specifically?

- Yes, because of quite a „family” mood - a lot of families, a lot of *cute children*; very safe city
- Stress put on history is perceived as interesting for women as well
- A lot of traditional handcraft, very affordable souvenirs (linen, amber, leather)

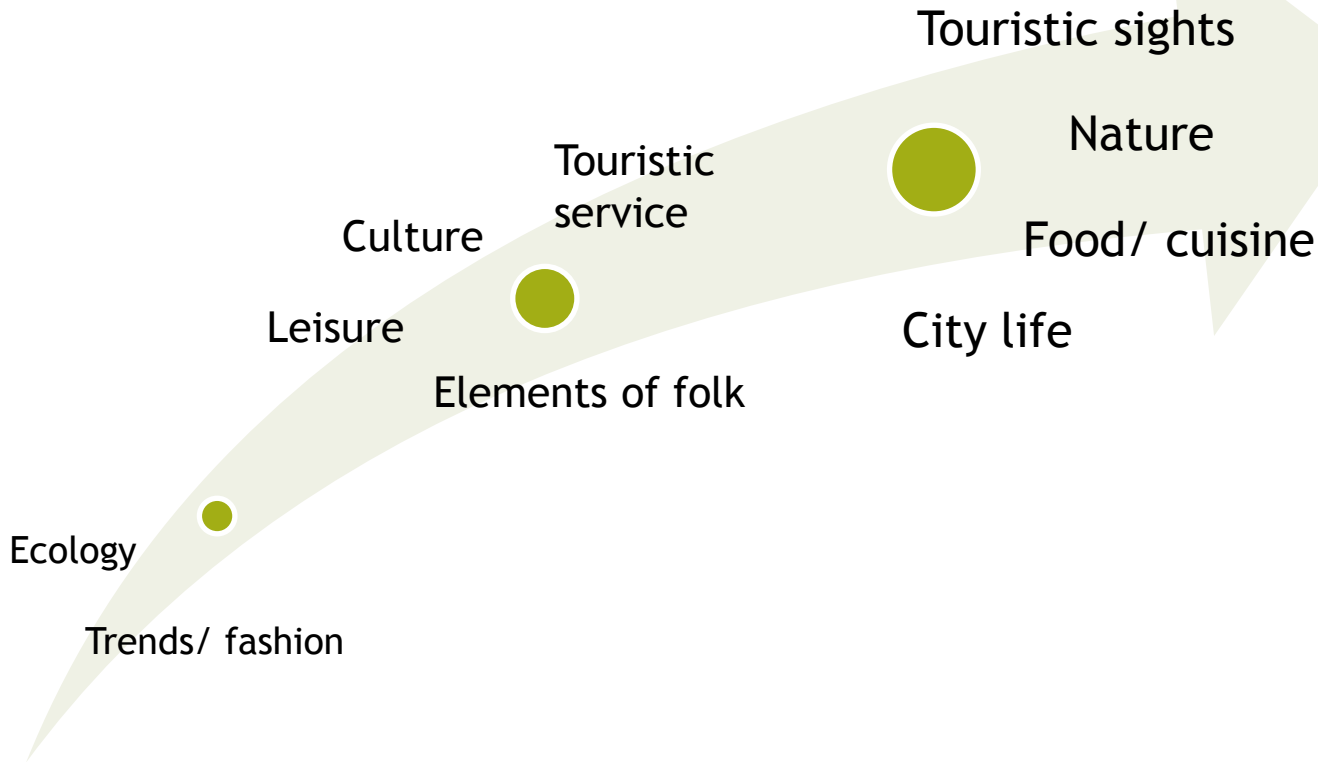
Quite universal character of the tourist shows the fact that uniqueness of Vilnius can attract various people and satisfy various needs. Authenticity and relaxation are the key words here.

Vilnius

- exploration of lifestyle categories -



More relevant/
important



Less relevant/
important

Vilnius

- more relevant lifestyle categories -



Food/ cuisine

- A chance to see a „real” market with local food - not for tourist
- Generally very tasty and very in line with demands of Japanese tourists
- Well balanced taste - i.e. simple, not exaggerated into e.g. spicyness or being heavy
- Not monotonous, even if based on potatoes

Attractive point of a visit - good quality, good taste, well balanced

Nature

- Usually - OK., nothing bad but also nothing good about that
- A lot flowers - visible on streets, at windows; generally - very colourful city because of flowers
- Closeness of trees, a lot of grass and parks
- Underlined by usually very sunny summer

Nature seemed to be the most appreciated in Vilnius compared to other cities included in the project. It is in line with general calm, traditional style of a city

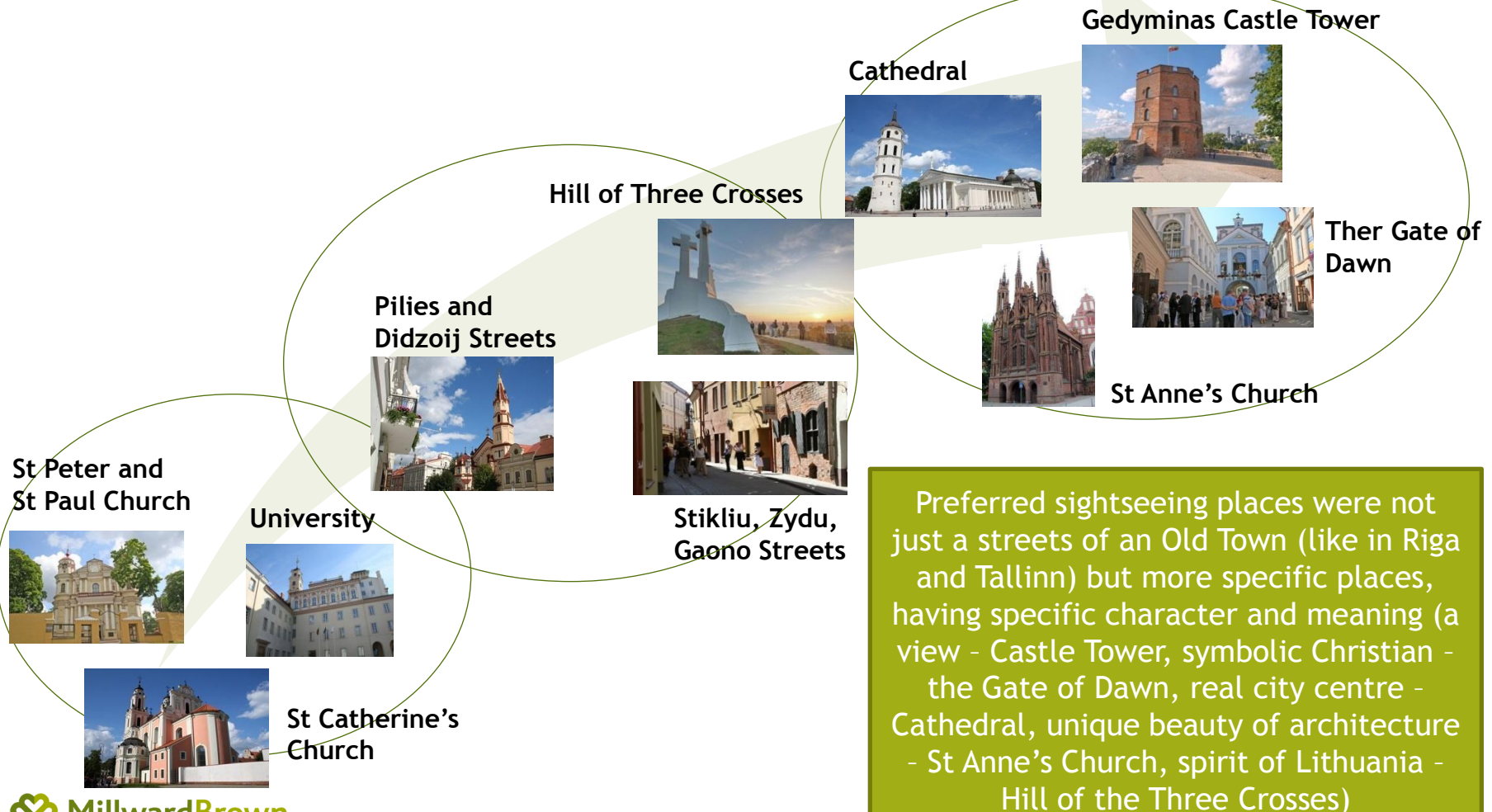
City life

- Neutral atmosphere
- No aggression, calmness, order
- Highly acceptable
- A lot of city life outdoor during summer
- Visible importance of Christianity
- A lot of chances to see real people and real life - Old Town is not commercialised

City life is quite one-sided (relaxation rather than fun), but it appeared to be tempting - close to Japanese mentality

Vilnius

- focus on touristic sights -



Preferred sightseeing places were not just a streets of an Old Town (like in Riga and Tallinn) but more specific places, having specific character and meaning (a view - Castle Tower, symbolic Christian - the Gate of Dawn, real city centre - Cathedral, unique beauty of architecture - St Anne's Church, spirit of Lithuania - Hill of the Three Crosses)

Vilnius

- undefined lifestyle categories -



Culture

- Usually: no chance (no time) to see anything
- Similarity to Riga and Tallinn
- But more positive opinion from residents:
 - A mid-summer night festival is very attractive
 - A lot of folk events (singing, dancing, parade; first day of spring) - possibly very exciting for Japanese people

Unused potential of traditional folk culture. Perceived lack of high culture is a drawback.

Touristic service

- Absolutely no problems
- Good attitude, kindness
- Ability to talk in English
- Sometimes not punctual enough

Acceptable level with some minor remarks

Elements of folk

- Very visible
- Usually liked very much - very different from Japanese culture

See; „Culture”. It is attractive, but not fully used and creates a feeling this is more for locals than for tourists (lack of English or Japanese information)

Leisure

- Quite a lot of possibilities - mushroom picking, sauna
- But this is not presented to tourists
- Closeness to forests, nature

Generally satisfying offer and possibilities, but much more important for residents - tourists have no time to use it

Vilnius

- less relevant lifestyle categories -



Ecology

- The city perceived as very clean
- A lot of nature, closeness of forests
- But no ecological habits - like sorting garbage

Attribute of minor importance. Lack of ecological habits, but nature and cleanness of the city create a feeling of „health”

Trends/ fashion

- Nothing like modern trends; sometimes: an opposite for fashion and trends
- But people are perceived as dressed in an up-to-date manner
- General attractive appearance of people for Japanese tourists
- Just mainstream brands available

Nothing about trends or fashion in the image of the city

Vilnius

- attributes and arguments -



Attributes chosen...

to be communicated

- ❑ **SAFETY**
 - Yes, except some risky areas (railway station)
- ❑ **HUMAN SCALE**
 - Great size for walking and 1-2-days visit
- ❑ **UNIQUE CHARACTER**
 - Very authentic, very close to real life
 - Attention-grabbing religion
- **NATURE**
 - Closeness of forests, a feeling of „healthy” country
 - Amount of flowers

- ❑ **CULTURE**
 - Regarding folk - OK.
 - Regarding high culture - not enough offer
 - Anyway - demands more communication in English
- ❑ **QUALITY OF SERVICE**
 - Acceptable with some minor remarks
- ❑ **ARCHITECTURE**
 - Yes, well preserved, old European style
 - But focused on churches - and this is not very special, you can meet it in many other European countries

not to be communicated

- ❑ **HISTORY**
 - ❑ Not very interesting for foreigners
 - ❑ Except Sugihara - but this is not a single strong reason for coming
- ❑ **DESIGN**
 - ❑ Except folk - nothing really innovative or interesting to be presented
- ❑ **INNOVATIVE CHARACTER**
 - ❑ No - Vilnius is all about history
- ❑ **LOCATION & CONNECTIONS**
 - ❑ Definitely complicated access
 - ❑ There are buses to Warsaw and Riga, but lack of frequent flights from Helsinki is problematic

Vilnius

- comments -



Vilnius - similarly to Riga and Tallinn - appeared to be a very positive surprise and a place to be really liked, both by tourists and residents.

Vilnius share quite a lot of valuable attributes and characteristics with the two other cities mentioned above: history/ tradition, small size and ability to see everything by walking, good level of service, nice food and drinks, a lot of sights to see, but its image was going even further into area of relaxation, calmness and family style. It is also connected with the fact that Catholicism is strong and visible - and it is in line with family values in the eyes of Japanese people.

Catholicism - on the other side - is associated with older people and it is visible in the Vilnius image - the most mature or even old from among all the cities included in the project.

As an opposite to Tallin and Riga, Vilnius is accompanied by Kaunas very visibly - tourists and residents perceive Kaunas as a necessary part of the whole trip - because of a beauty of this city, its closeness as well as because of historical connection with Japan (Chiune Sugihara).

There is also an element of authenticity that creates a communicational potential of Vilnius - it was a city which is perceived as the least commercialised - some tourists and residents had a feeling that the distance between them and real local life is very small - a good opportunity for those tourists who look for „less touristic” experience.

It also seems that nature is strongest in Vilnius compared to other cities - which is in line with general relaxing image of the city



Sankt Petersburg



Sankt Petersburg

- first reactions -



tourists

- Beautiful city
- Beautiful facades of buildings
- Impressive mosaic inside the Church on the Split Blood
- More „western and European” than Moscow
- Unique city
- ➔ A lot of communistic monumentality
- ➔ A huge country, everything is huge - similar to China
- A lot of thieves - a member of the group have lost a camera and wallet
- A feeling of *lack of freedom* (e.g. compared to Paris), like *being still Soviet*

positive



negative

residents



- Beautiful
- Traditional city
- More calm and peaceful than Moscow
- Growing modernising city, more of clubs, stores, business than a few years ago
- Well developed night life
- Very European appearance - like France, Poland, Baltic States
- Some difficulties in life
- Japanese are visible strangers - sometimes local people use it (e.g. do not give a change, etc.)
- People are helpful, but sad, hard working
- Problems with a dirt

Generally image is visibly split between impressive architecture and problems with safety and general atmosphere created by locals which is just not comfortable for Japanese women.

Sankt Petersburg

- likes and positive experiences -



Connected with CITY STYLE/ APPEARANCE

- Beauty of buildings, architecture – a lot of associations with Western Europe – mainly Paris, also some German cities, Madrid
- A lot of beautiful churches
- All key places are within walking distance
- Very expressive way women are dressed
- An interesting mix of tradition and modernity
- A lot of 24-hours cafes and stores

Generally a majority of positive experiences are clearly connected with architecture - very European, very traditional.

Connected with CULTURAL OFFER

- Easiness to see top arts
- World famous arts – paintings, ballet, writers
- Affordable compared to Japan
- Famous ijn Japan – a kind of „must see”

Definitely the most attractive area and reason for coming - fame of cultural offer of Sankt Petersburg makes it really unique, despite of any drawbacks mentioned later

Sankt Petersburg

- dislikes and negative experiences -



Connected with CITY

- Strong feeling of lack of safety; they are afraid of walking on the streets alone/ late in the evening; some cases of being robbed
- Post-soviet atmosphere – lack of feeling of freedom, an atmosphere of hard-working, rather depressed people
- Dangerous to travel; unclear system of public transportation
- Lack of clean toilets – even in rather good restaurants or bars
- Unclear public transport system - lack of good information
- Lack of Japanese materials in Hermitage
- High prices, especially compared to quality (e.g. clothes)
- Very commercialised - e.g. a necessity to pay for pictures taken with characters dressed in traditional clothes
- Some unfair ideas - like more expensive tickets to Hermitage bought via internet
- Problems with finding a good quality fresh food
- A problems with dirt - polluted city, water smelling bad, some garbage on streets

Quite a lot of very basic functional problems for Japanese tourists who are (and describe themselves as) rather demanding and paying attention to details. In general it was making a visit or stay in St Petersburg not an easy experience - this is why they were in a state of mind which could be describe as cautious

Sankt Petersburg

- dislikes and negative experiences (cont'd) -



Connected with **PEOPLE/ MENTALITY**

- A feeling of sadness and aggression – no cheerfulness, no relaxation or laid-back
- Problems with service – lack of smile, not enough kindness; not flexible in hotel, not kind enough in restaurants
- Rather too expressive way women are dressed, too much of sexuality
- Problems with communication in English
- Unfriendly people from the beginning – lack of smile at the airport
- Lack of trust -e.g. to taxi drivers

Generally speaking, even if general opinion about St Petersburg was positive, perceived attitude of people and atmosphere created by local people is problematic. There was a visible tendency not to get close to local people, but rather to keep a distance.

Sankt Petersburg

- compared to expectations -



tourists

- Similarity to Paris
- Unique heritage of tsars - architecture, culture
- Attractive famous places - Hermitage, ballet

- Traditional, beautiful city
- Post-soviet character - unsafe, dirty, sad, grey, a „vodka place”

→ Similar to Moscow

Some
positive
surprise

- Much more European than „soviet”
- Really impressive Hermitage
- More vivid than expected
- More calm than Moscow
- Somehow developing

But
negative
as well

- Unsafe city
- Dirt; beauty „covered by dust”
- Not that open for tourists



residents

The expectations are split between hopes for beauty and fear of post-soviet character. Lack of clear direction in the way of city is experienced vs expectations as well.

Sankt Peterburg

- reasons for coming -



More „active” - connected with Sankt Petersburg specifically

- Hermitage
- Ballet
- Interest in history - Catherina the Second
- To see how the city has changed after several years

More „passive” - Sankt Petersburg as not the main purpose

- Not such cases

Sankt Petersburg is not a city visited „by accident” - there is a purpose, the city gives concrete reason to come (usually Hermitage and ballet). On one hand it shows the strength of concrete offer, but on the other it can show as well that coming to St Petersburg is an effort - probably on both logistic (visa, trip) and mental level (rather negative image, a fear). This is why Sankt Petersburg is not a city just to come to, but a place to which one should prepare.

Sankt Petersburg

- a touristic place? -



YES!



... but

TOURISTIC SIGHTS

- Hermitage
- A lot of places/ buildings connected with history/ tsars
- Places connected with famous writers
- Other famous places and monuments

SIZE

- A possibility to reach a lot by feet

OTHER REASONS

- White Nights
- Boat trips, especially at night

- Definite lack of a feeling of safety!
- A lot of problems with cleanness
- Unclear public transport system, lack of ticket vending machines
- Not enough information for Japanese people, even in the most famous places (Hermitage)
- A lot of things are surprisingly expensive - e.g. restaurants, entry fees
- Not enough information in advance - e.g. surprise that a lot of museums are closed on Mondays and some also on Tuesdays

Touristical potential of most famous places in St Petersburg is not questioned, but there are a few important drawbacks which make tourism more difficult than it could be.

Sankt Petersburg

- a touristic place? -



Suitable model of a tourist

- Rather older
- Interested in history and arts
- Woman more than man - because of sensitivity to arts and architecture

Unsuitable model of a tourist

- Younger person looking for shopping
- Younger person not interested in arts, not appreciating traditional architecture
- A person looking for fun - i.e. clubbing
- Someone looking for a leisure
- A tourist who can't speak Russian
- Someone looking for rally clean places



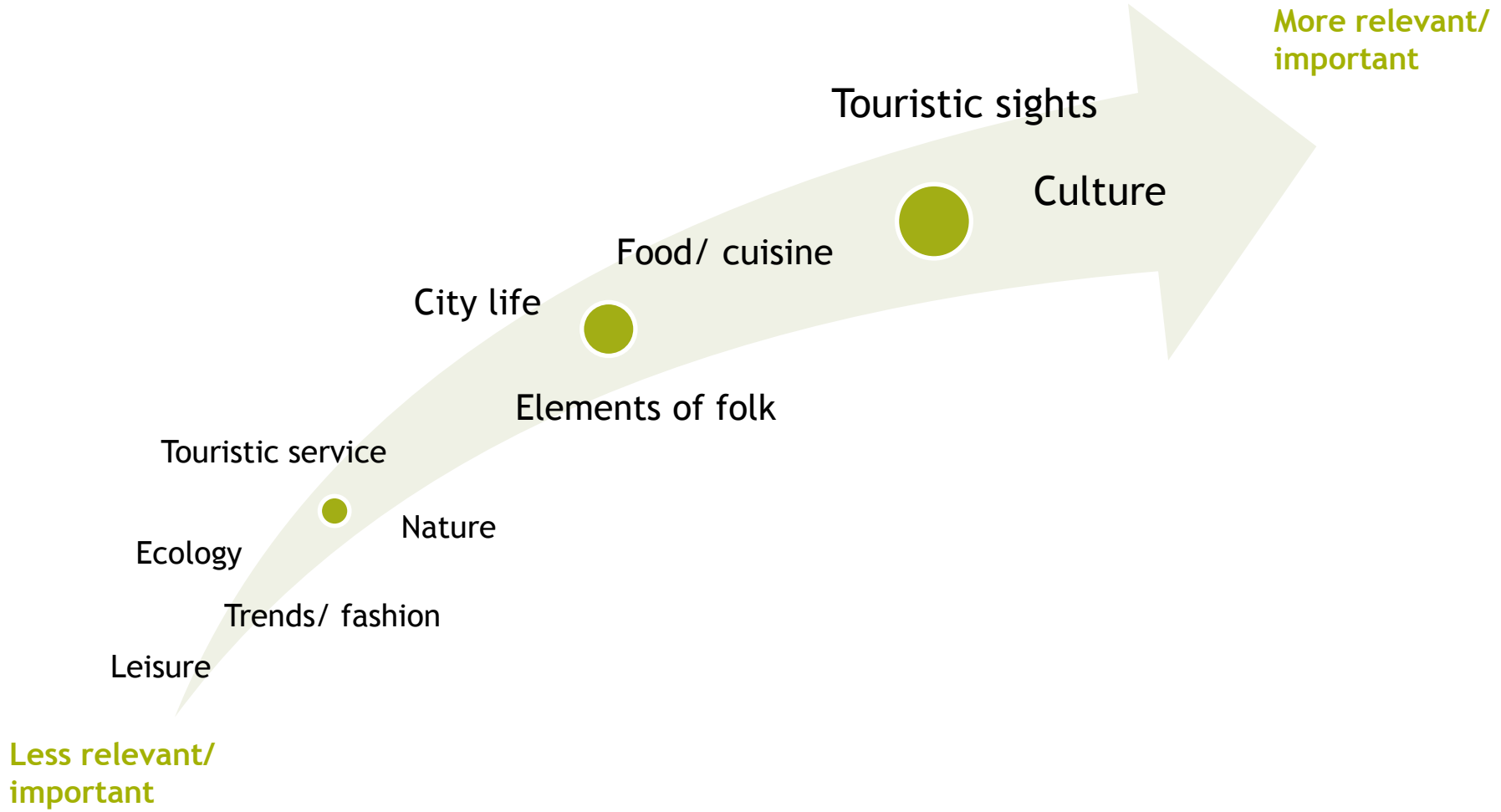
What about female tourist specifically?

- Polarised opinion:
- YES because:
 - Feminine interests can be satisfied: paintings, ballet, architecture
 - There is a lot to be seen
- NO because:
 - Not that much - lack of safety and lack of good shopping opportunities - i.e. no big brands
 - Rather disappointing food and drinks

Not an easy task - which shows that a tourist should be prepared while coming. It seems that arts and history is the only one really important trigger. It must be stressed that female tourist is not perceived as fitting St Petersburg well - a fear of safety seems the most important issue here

Sankt Petersburg

- exploration of lifestyle categories -



Sankt Petersburg

- more relevant lifestyle categories -



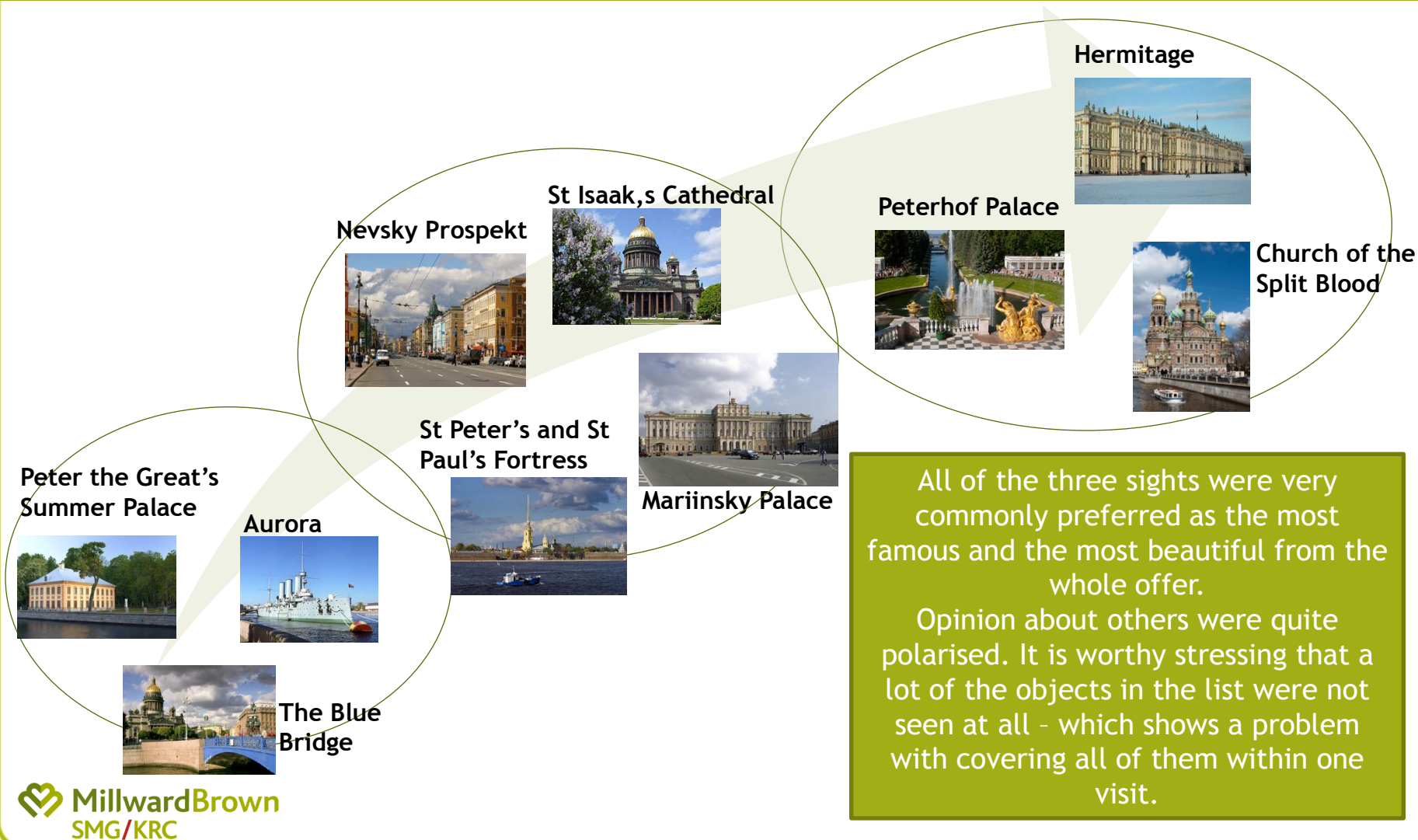
Culture

- World famous objects and places - Hermitage, ballet
- Highest quality of arts and theatres
- Places connected with world fame authors
- A lot of old culture visible on streets (old architecture)
- Some famous element of folk and rural culture is significant as well

A single reason for coming to Sankt Petersburg.
Uniqueness of the city on this area is strong enough to ignore other drawbacks.

Sankt Petersburg

- focus on touristic sights -



Sankt Petersburg

- undefined lifestyle categories -



Food/ cuisine

- Nothing really special
- Quite hard to find some really local specialities
- But usually liked or at least accepted
- Drinks are usually stronger

Usually acceptable, but not very sharp image - lack of orientation in what is typical, local, what kind of specialities are worthy eating.

Surprisingly high prices and unfriendly service decrease value of this category

Elements of folk

- Traditional Russian patterns
- Orthodox tradition
- Some quite known symbols - Matrioshka, Cheburashka, some traditional patterns (boxes)

Folk in general was rather liked and treated as „a must” for a touristic place. But nothing really striking in St Petersburg and it had definitely lower importance than everything connected with high culture

City life

- Lack of safety
- But the city is active until late night
- Not too busy, not a „business” character

City life was very polarising - a night life of St Petersburg created both courage and fear connected with safety

Sankt Petersburg

- less relevant lifestyle categories -



Ecology

- Quite a lot of garbage on streets
- A water seems not clean enough - a feeling this is not a healthy city
- General feeling of rather polluted city

Touristic service

- Quite a lot of problems with kindness, honesty, style (smile!), flexibility (even in hotels), language (everywhere)

Leisure

- Nothing noticed by tourists
- But even for residents - the choice seemed to be relatively small

Trends/ fashion

- No big brands, no good shopping
- Specific appearance of local women - very expressive, even provocative, exaggerated for Japanese women

Nature

- Impressive Neva
- But parks are rather standard
- Not much of nature
- Usually - quite dominated by a feeling of a dirt

Sankt Petersburg

- attributes and arguments -



Attributes chosen...

to be communicated

❑ **UNIQUE CHARACTER, CULTURE**

- Because of unique cultural places - Hermitage, ballet

❑ **ARCHITECTURE**

- Unique reminders of the past

❑ **HISTORY**

- ❑ Could be interesting, but rather only for more demanding tourists

❑ **NATURE**

- Nice river and quite a lot of parks, but there is nothing really striking about them
- Rather dirty, polluted city

❑ **HUMAN SCALE**

- Rather big and noisy
- But as far as tourism is concerned - quite well concentrated

not to be communicated

❑ **DESIGN**

- ❑ Nothing about modern design

❑ **INNOVATIVE CHARACTER**

- ❑ Definitely not - it is all about history

❑ **LOCATION & CONNECTIONS**

- ❑ A very long trip, necessity to change the plane in Moscow

❑ **QUALITY OF SERVICE**

- Definitely disappointing - lack of smile and kindness, problems with language, lack of honesty

❑ **SAFETY**

- Definite lack of a feeling of safety

Sankt Petersburg

- comments -



Sankt Petersburg appeared to be the most controversial city from among all included in the project - it offers a world fame of some elements of culture which can be (and really are) a single reason for coming. A beauty connected with the past, European style, visible similarities to most famous European capitals is a huge advantage and potential of the city.

But at the same time the city is more to „survive” rather than to really like - Japanese tourists, especially Japanese women, often feel uncomfortable with a lack of safety and problems with service.

Sankt Petersburg seems to be a city that needs preparations - just coming here, without a knowledge can cause negative surprise connected with some inconveniences or fears. It is highly recommended to communicate Sankt Petersburg as a place for groups rather than individual tourists and for those who are more experienced in travelling abroad, who feel more self-confident with being in touch with different culture and different mentality.



Warsaw



Warsaw

- first reactions -



tourists

- Beautiful architecture of the Old Town; bigger than expected; lots of wide streets and open view of the sky;
- Famous for **F. Chopin** and his music;
- **Refreshing experience**;
- Comfortable feeling;
- Culture that stands over the politics.
- Interesting **mixture** of culture and chaos of transformation;
- Long and **interesting history**;
- The society is quickly moving forward to a Western Europe countries;
- ➔ People's way of thinking is different from the Western Europe;
- **People seem not to be friendly**;
- **Not clean, dusted and polluted**;
- Too much of graffiti at the old buildings;
- Huge, not so pretty soviet building in front of the station.

positive



- **Culture and music** - accessible and at the high level;
- Famous for **F. Chopin**
- **Beauty**, beautiful Old Town;
- **Open view** - wide streets, sky and green;
- Refreshing, still bit different than the Western Europe;



➤ Not clean

negative

residents



- **Very beautiful** and historical city; Green; **Visible nature**; a lot of parks, cafes, restaurants, bars and clubs;
- Easy access to classic music, it can be heard at any corner even in the park;
- **People are kind** especially if you know them, they directly tell what they need or want, they react nice on the bad weather;
- General: **not a very big** and busy city, enjoyable, easy to live;
- Special attributes: **places related to Chopin and his music**;
- ➔ Good for a 1 or 2 days; 3 days is max;
- ➔ **Similar to Prague**;
- The city is **not very convenient**;
- **Public transportation system** is complicated and **there is no English information** at the bus stops and inside buses;

Warsaw is seen as a bit chaotic city in the process of transformation. It's a source of mixed feelings. It is definitely interesting. The city is mostly famous for F. Chopin and his music.

Warsaw

- likes and positive experiences -



Connected with CITY STYLE/ APPEARANCE

- Green city - lots of park and trees even in the city center;
- Beauty of the city - especially the old architecture;
- Good opportunity to listen the classical music;
- You can see a lot of sky - open view, wide streets;
- Mixture of old, historical architecture and soviet buildings, very different from western style;
- Authenticity - i.e. Christmas decorations at the streets are real expressions of people religious beliefs not just commercial symbols.
- Interesting history; Lot of different style churches;

Focus on the beauty of the Old Town as well as the easy access to parks and open view. Interesting history of the city and the mixture of architectural styles (old fashioned and soviet) can attract attention.

Connected with POSSIBILITIES/ OFFER

- High culture - Especially classical and Chopin music concerts are accessible, good quality and cheap;
- Finding the F. Chopin foodsteps is easy.
- Good selection of cafes, restaurants, bars and clubs;
- Possibility of eating in the garden outside the restaurant;
- Good food - corresponding to the Japanese taste;

Opportunity to listen F. Chopin and classical music is the key area of positive experiences. It is high quality and cheap. Positive experiences are also connected with eating/ cuisine.

Connected with PEOPLE/ MENTALITY

- Easiness of communication in English, especially with young people; Good sense of humour;
- Kindness and helpfulness of people;
- Simplicity and directness of communication;

Experiences with locals are more satisfying in the closer contact. Unexpectedly communication in English is easy and direct.

Warsaw

- dislikes and negative experiences -



Connected with **PEOPLE/ MENTALITY**

- People seem to be upset and not friendly; Not enough smile;
- Waiters are still focused on getting the money from the customers rather than being kind for free; Only minimum is done in the area of services;
- People who are over 50 hardly ever speak English; Bus drivers, post office workers and all kinds of office workers do not communicate in English at all;
- People in the offices are always trying to dump the responsibility onto you;

Experiences with people cause the mixed feelings. Seems that the first contact might be difficult because the lack of smile and effortless kindness. Japanese tourists are also sensitive to the „nothing for free” attitude.

Connected with **CITY/ OFFER**

- Not clean enough: polluted air, graffiti, rubbish at the train;
- Not that much of touristic sights; The Old Town is actually a replica;
- No sufficient information in English – i. e. bus stops, bus, restaurant menu;
- Relatively difficult to get (no direct flight);
- Bad roads, not convenient to drive;
- Too cold in the winter;
- The need of buying drinking water, even at the restaurants you need to pay for it.
- Limited variety of products in stores – i.e. it is not a shopping city

The key negative experiences are lack of cleanness and not sufficient number of touristic sights. All the other negative experiences appeared to be rather marginal - i.e. they were much more a kind of inconvenience rather than strong negative emotions

Warsaw

- compared to expectations -



tourists

- Belief that people are keen of music, culture and high intellect;
- ➔ Knowledge about the Smolensk air catastrophe;
- **The strongest and only association with Warsaw was F. Chopin;**
- A fear of „Soviet Union” character - grey, sad, depressing;
- Doubts about people’s soviet mentality and knowledge of English;
- Pretty old town, nice parks and wide streets;
- Kind and helpful people;
- Lots of restaurants, cafes, bars that serve good food
- Lots of music, even at the streets;
- Famous for the Nobel Prize winner M. Curie
- Darkness, cold weather;
- Afraid of too small city reminding countryside;
- Expecting difficulties in doing shopping (i.e. fresh fruits and vegetables);



residents

A lot of positive surprise!

... and some disappointments

- Much safer
- Greener and full of parks
- Much more modern/ Western
- Bigger than expected - more „urban”
- Easier to communicate in English
- The Old Town is a replica
- More dust/ pollution/ graffiti
- Not sufficient service
- Not enough smile and cheerfulness of people

Warsaw is mostly famous for being the F. Chopin city. Places related to the composer are the greatest strength of polish capital. A fear of rural and provincial character of the city is still noticeable. Post-soviet character still appeared to be an important thread for successful promotion of the city for Japanese tourists. Dust and pollution are a kind of negative surprise.

Warsaw

- reasons for coming -



More „active” - connected with Warsaw specifically

- Interest in piano music, especially F. Chopin
- Looking for the F. Chopin footsteps
- Wish to learn how to play piano
- Joining the Master Class of Piano
- Possibility of working as a pianist
- Interests in the history of the region
- Curiosity about the people who experienced the Soviet influence and now going through the social and economical transformation

More „passive” - Warsaw as not the main purpose

- Personal reasons - husband is Polish
- Attending the scientifically conference and Tallinn and having few spare days before going to Great Britain;
- Willing to visit also Auschwitz, Krakow and Zelazowa Wola;

It is very significant that choice of Warsaw is almost always connected with the interests in the F. Chopin life and music. Belief that Warsaw is a great place for learning how to play the piano seems to be very strong in Japan. Japanese tourists are willing to feel and understand F. Chopin music deeper and better. They also expect to meet people with whom they might share their interests. This attitude comes together with the knowledge about Warsaw as a city and Poland as a country.

Warsaw

- a touristic place? -



YES!



MUSIC

- Opportunity to listen and learn how to play to the F. Chopin music

BEAUTY

- Buildings, wide streets, generally entire Old Town and Nowy Swiat Street - because it's beautiful and authentic
- Lots of parks and green at the streets

SIZE

- Everything to be seen within 2 days
- No need to hurry, a nice trip if goes together with Zelazowa Wola, Auschwitz, Krakow/ Wroclaw or Zamosc

OFFER

- Good selection of cafe, restaurants and bars serving tasty food in affordable prices
- Good quality and cheap concerts, especially Chopin music

MOOD

- A tourist from Japan can feel comfortable, calm and safe;
- Refreshing after seeing Western European countries;
- Authentic, not commercialized;

... but

- The feeling that nothing even smile is for free
- The public transportation system is not adjusted too foreigners needs
- Bad and cold weather in Winter (resident)
- Not much of information at the Japanese guide books
- Lack of famous single object/ building to be a strong reason for coming
- Complicated and time consuming travel

Warsaw

- a touristic place? -



Suitable model of a tourist

- Both male and female;
- Rather elderly;
- Interested in music, especially F. Chopin music
- Seeking for cheap and high quality concerts
- Willing to meet local people and learn about their authentic life
- Experienced in travelling around Europe
- Looking for calm and slow life
- Focused on culture, tradition, history
- Also looking for refreshment and relaxation
- Those who don't want to spend too much money



Unsuitable model of a tourist

- Shoppers, looking for rush, excitement and fancy city

What about female tourist specifically?

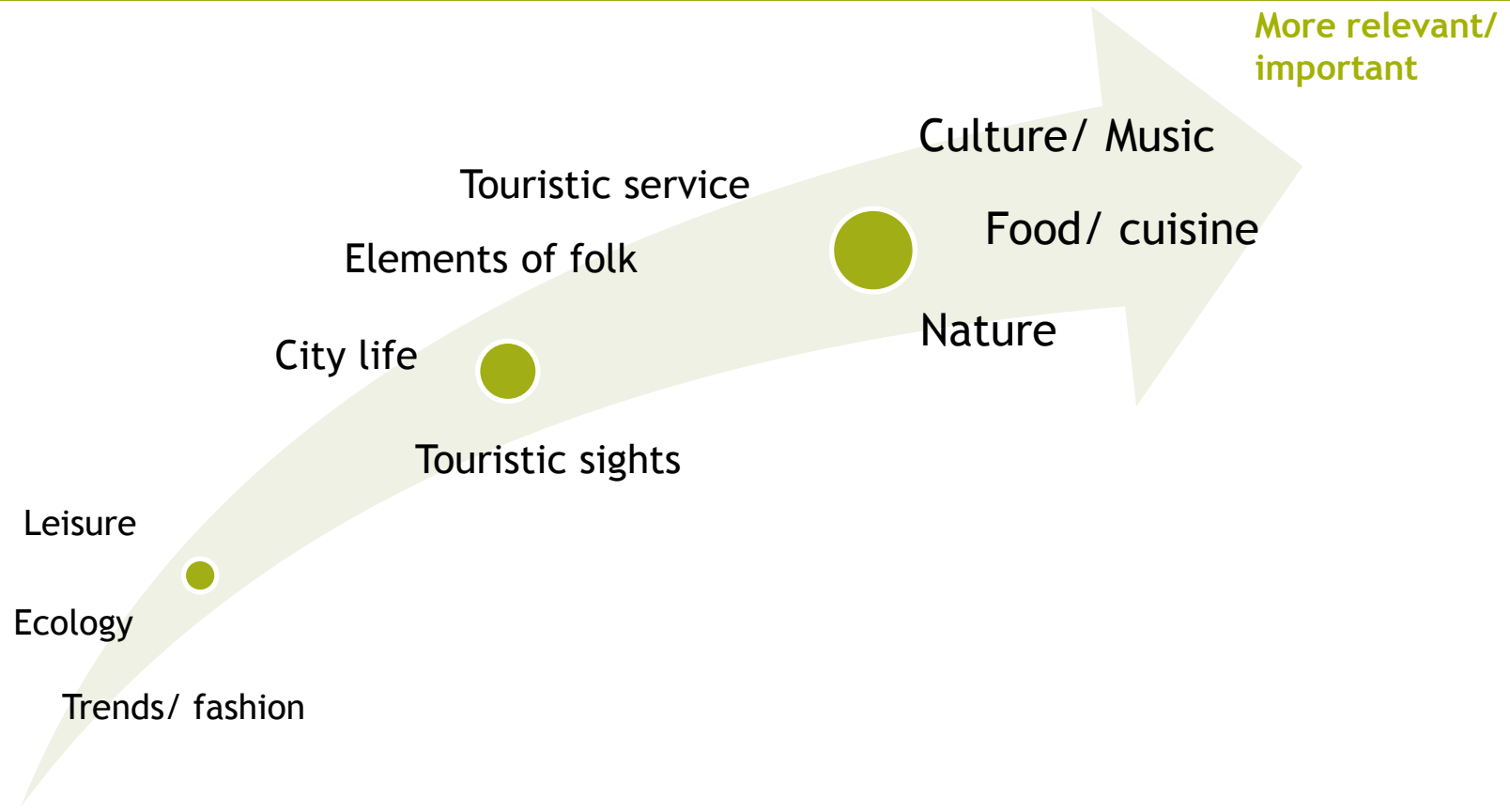
- YES! - safe, full of music and F. Chopin footsteps and the beautiful sights at the Old Town

Warsaw is definitely perceived as a place for tourist who are interested in F. Chopin and his music. It is much more about culture, concerts, calm and refreshment than fun and excitement.

F. Chopin music, lots of parks, old fashioned architecture of Old Town combined with safety make it attractive specifically for women

Warsaw

- exploration of lifestyle categories -



Warsaw

- more relevant lifestyle categories -



Culture/ Music

- A fame of Frederic Chopin
- A lot of contacts with the music, outdoor music during summer

Definitely a strong point of a visit, especially for the person who is interested in music

Nature

- Very nice parks
- Frequently surprising - mostly Łazienki and Wilanów
- Large, clean parks
- A feeling that there is a lot of green in the city

High potential, but should be better promoted in the guide books

Food/ cuisine

- A lot of really taste food
- Some Polish specialities specifically nice (gulasz, pierogi, bigos)

Food / cuisine is surprisingly corresponding with Japanese taste

Warsaw

- focus on touristic sights -



Generally: bit disappointing: old town is not really old, and comparing to other Polish cities Warsaw do not have that much to offer.

Warsaw Uprising Museum



Wilanów Park



Places related to F. Chopin

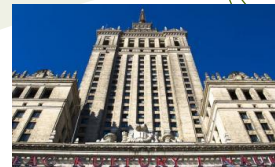
Old Town



University of Warsaw Library



National Museum



Palace of Culture and Science



Łazienki Park

Praga District



Zoo

Tourist attractiveness is mainly focused on F. Chopin related places, Old Town and parks. Japanese appreciate Wilanow and Łazienki with their calm and relaxing character. Generally those objects which are not connected with historical buildings were just less attractive/ ignored/ unknown. Praga District is seen as dangerous, whereas Zoo seem to be not interesting and unique for Tourists who can easily visit facilities of this sort in Japan.

Warsaw

- undefined lifestyle categories -



Touristic sights

- Quite a lot to see, but not that much - compared to other European cities
- But widespread all over the city - big distances
- A lot of graffiti - a feeling if dirt covering touristic sights

Elements of folk

- Not noticed by all
- If noticed - usually liked (Mazowsze, dancing, wycinanki)
- But nothing really striking, very unique
- Lack of any specific symbol of Warsaw - a kind of „must have” souvenir

Touristic service

- Not enough smile, not enough friendliness
- Sometimes - lack of honesty and slightly too commercialised approach of people

History

- Can be attractive, but demands more advanced tourist - passionate about it
- History reflecting strength of the nation
- Interesting motif of rebuilding the city

Warsaw does not have an image of a city full of touristic sights. There is a definite need for creating a good tour that could cover as much as possible

There is a potential, but it needs to be promoted better

Definitely an area for improvements - Japanese tourists are sensitive and demanding

Interesting for those who are more into getting knowledge, rather not a „mainstream” tourist looking for relaxation

Warsaw

- less relevant lifestyle categories -



Leisure

- Not that bad offer
- Quite a lot of possibilities for doing sports
- But mentality is less about active kind of leisure
- Not very interesting for Japanese tourists

The offer is just perceived as sufficient, but nothing really unique about it.
Lack of interest among tourists.

Trends/ fashion

- Nothing like that - Warsaw is perceived as much far from typical trendy/ fashionable Western European cities
- But the way people are dressed was liked, regarded as „pleasant, normal”

No trends/ fashion is associated with Warsaw

Ecology

- Usually - no opinion
- But quite a lot of complains about general low level of cleanness of the city

Rather weak element of the city image.
But also - not a big interest for tourists.

Warsaw

- attributes and arguments -



Attributes chosen...

to be communicated

not to be communicated

❑ MUSIC

- Definitely music and F. Chopin is the most important reason to visit Warsaw

❑ NATURE/ GREEN

- Quite a lot existing, quite a lot to discover
- Especially if combined with music (Chopin)

❑ SAFETY

- No problems with that

❑ UNIQUE CHARACTER

- Unique in terms of specific place in the world (West-East) and time (transition)

❑ HISTORY

- Demands more involved and „advanced” tourist who wants to experience more than just a leisure

❑ DESIGN/ ARCHITECTURE

- Some interesting objects and places
- Beautiful Old Town
- But chaotic and not consistent - modern parts are not impressive

❑ CULTURE/ EVENTS

- Except Chopin: not too much of it
- Definitely folk should be better promoted

❑ HUMAN SCALE

- Rather demanding - quite big, not concentrated city
- But also perceived as relatively calm

❑ LOCATION

- Not very easy access, no direct flights, relatively long trip
- Also not perceived as well connected with other big European cities - quite distant

❑ QUALITY OF SERVICE

- A lot to be improved in style/ mentality

❑ INNOVATIVE CHARACTER

- Nothing really innovative

Warsaw

- comments -



Warsaw seems to be quite inconsistent. This kind of incoherence and even chaos makes it quite unique in the eyes of Japanese tourists and residents - the city is perceived as being in the middle of process of changing and in the middle between West and East.

Such kind of complex character makes it an interesting place rather for more experienced tourist, who is not looking only for a surface (just beauty, good shopping, quick view), but for a touch of specific life, mentality, a real life of people who are in the process of changing their lifestyle. Warsaw does not seem to be very „easy” for a tourist - lack of clear centre, widely spread tourist attractions, some inconveniences connected with public transport, relatively big size, not the best service, lack of cleanness - all these characteristics make it not that easy to visit like e.g. Tallinn, Riga and Vilnius.

But at the same time it gives a feeling of modernising, changing place within Europe, which is attractive for Japanese tourists.

Chopin plays a different, own role in the city image - it is a calling card of Warsaw (and Poland) for Japanese people, and can be a very strong and sometimes a really single reason for coming.



Berlin



Berlin

- first reactions -



tourists

- Very clean
- Monumental - what is a bit scary, but very interesting, different to Japan
- Interesting differences between West (modern) and East (traditional)
- Lot of parks, nature, green, trees
- A lot of music, great selection of classical music on CDs

positive



negative



residents



- Very creative city - many artists, street art
- Very international character
- Freedom
- A lot of foreigners
- Very vivid lifestyle
- Convenient life - everything so close, accessible
- Slower life compared to Japan
- Very convenient public transportation
- Very interesting, not boring city
- Great night life
- Great clubs

Absolutely positive feelings - Berlin is loved from the very beginning, regardless the length of stay!

Berlin

- likes and positive experiences -



Connected with CITY STYLE/ APPEARANCE

- A city on the move, changing
- Very artistic character
- Well developed city life – the city is living until late night
- A lot of tradition, but mixed with modernity very well
- wide streets, a feeling of openness, air inside the city
- The city is busy but remains green
- A lot of cars from brands which are liked by Japanese very much: Mercedes, Audi, BMW

Generally Berlin appeared to be a unique place in terms of its style, mood and appearance - it is most of all a unique combination of modernity and tradition. This could be similar to Warsaw, but the combination here is perceived as more smooth, better matched, in harmony rather than creating a „conflict”

Connected with POSSIBILITIES/ OFFER

- Very convenient life – shops, eating out, great public transportation system
- Surprisingly affordable prices
- Highly developed cultural opportunities
- Highly developed opportunities connected with having fun

Berlin was perceived as offering enough possibilities for very various tourists and wide choice of offers can satisfy very various needs

Berlin

- likes and positive experiences (cont'd)



Connected with PEOPLE/ MENTALITY

- Very multi-cultural
- Very free - *I can really do what I want, nobody controls me like in Japan*; individuality, independence, even selfish character
- But at the same time – they are positively predictable and focused on not breaking rules or law; Berliners are keen on punctuality and cleanness – very close to Japanese lifestyle
- Very open to others, a lot of tolerance and positive kind of distance to life
- No focus on foreigners – Japanese people are not focusing attention of others/ locals which is very convenient
- No problems with communication – English is popular, people are helpful

Very interesting and unique area of associations - Berlin appeared to give the most of feeling of freedom, it gives a chance to touch European values - which is very attractive for Japanese tourists.

At the same time - it does not go too far, i.e. German order and predictability is very liked as well as very close to Japanese mentality

Berlin

- dislikes and negative experiences -



Connected with **PEOPLE/ MENTALITY**

- Sporadically: slightly not enough order as for a Japanese person – too much of „free spirit”
- Difficult start of relationships with local people – they are rather cold and serious at the beginning

These remarks appeared to be sporadic and rather of minor importance. It was more a kind of some surprise rather than a source of any negative opinion about Berlin

Connected with **CITY/ OFFER**

- Slightly not enough of free public toilets
- Complications for residents – a need for extending visa and getting permission for work, a need for speaking German in institutions
- Problems with too big sized clothes

Again - rather details which were not serious enough to destroy general positive opinion about the city

Berlin

- compared to expectations -



tourists

- Very interesting history - a 2nd World War, the wall - famous in Japan
- A capital - modern, big, vivid

- Modern, developing city
- Great place for artists and musicians
- Good food, good beer, beer gardens



residents

A lot of positive surprise or confirmation!

- Much more green than expected
- More monumental
- Confirmed all positive expectations connected with modernity, artistic character, development

... and minor disappointments

- Initial cold in local people's behaviour and lifestyle

Berlin seems to be a city where it is easy to make a decision to come to - both tourists and residents had positive and promising image of the city before they came and moreover - their expectations were consistent with reality

Berlin

- a touristic place? -



YES!



ATMOSPHERE

- Very vivid, energetic, creative, multicultural and tolerant
- But at the same time - no feeling of pressure or stress; generally slower life

ORGANISATION

- Easy to navigate within the city
- Very clear and well developed public transportation system
- Logical touristic routes

OFFER

- Good shopping opportunities
- Some desired gadgets/ souvenirs - like very famous Ampelmann
- Affordable prices for many things, including food in restaurants
- A large variety of places to have fun (clubs)
- Highly developed culture - a lot of possibilities

HISTORY

- Interest in newest history (the wall, Eastern Berlin)

... but

- A lot of reminders of Nazi times - this is not pleasant for tourists from Japan, they prefer *Kaizer* times
- There could be more touristic information in English, not only in German
- Some information are not full - e.g. with relation to opening hours and closed days in museums

Berlin

- a touristic place? -



Suitable model of a tourist

- Young, looking for a big agglomeration, fun, clubbing, party - it can easily be the only reason for coming!
- Interested in history and arts
- Interested in fashion and creativity/ design/ architecture
- Interested in music - classical, independent, modern - any kind
- For some: ANY KIND of tourist



Unsuitable model of a tourist

- Looking for calmness and silence

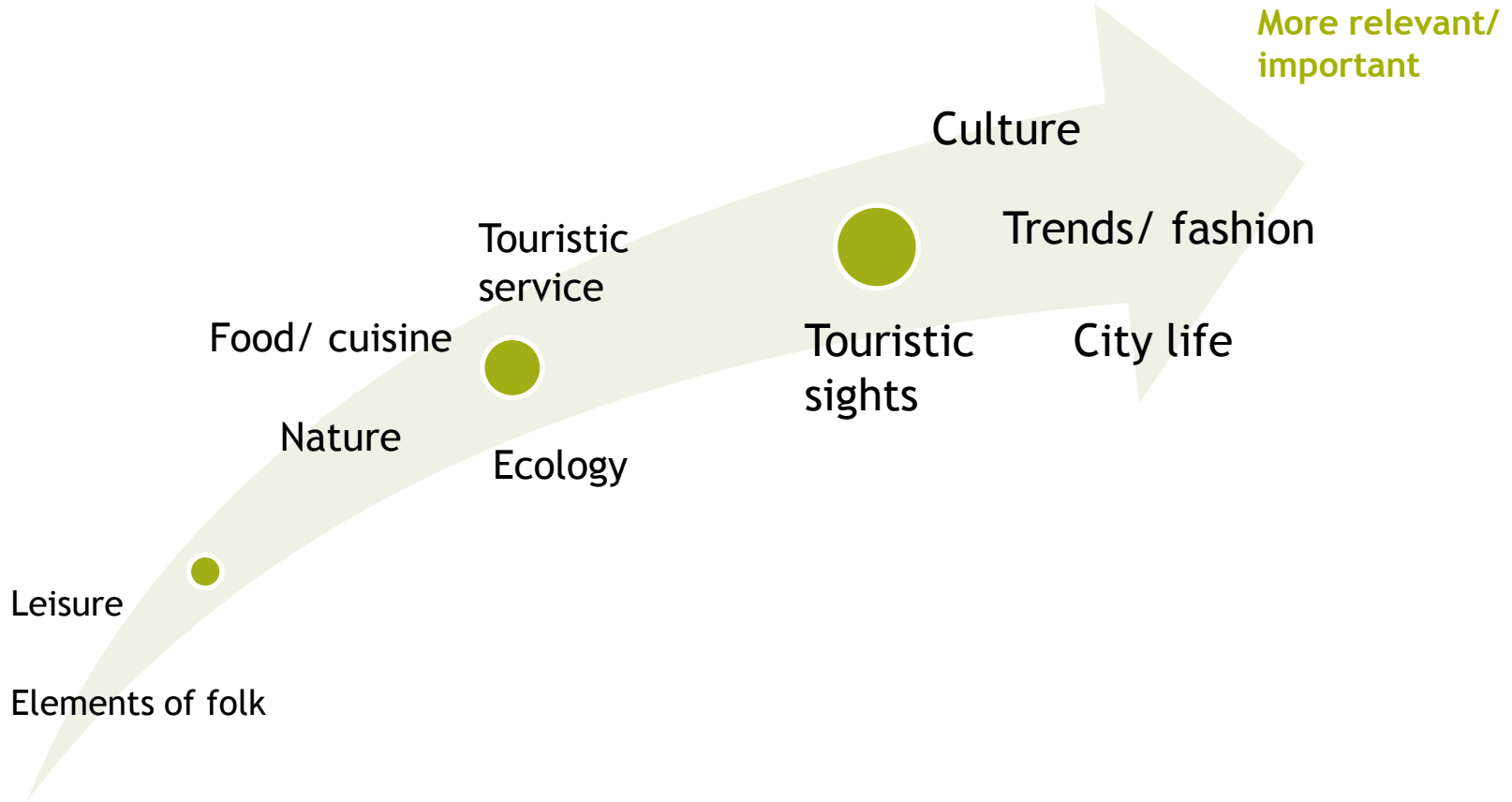
What about female tourist specifically?

- YES! - because of being a great place for shopping (famous Ku'damm, good brands)
- Also very safe
- A Japanese woman is not focusing attention thanks to a multicultural character of the city
- „free spirit” lets Japanese women here to be more brave, even provocative
- Tradition and history

Very universal kind of a projected tourist show a potential of Berlin - a city can satisfy very different needs. Perceived as very suitable for Japanese women thanks to a pleasure of shopping, history and specific atmosphere.

Berlin

- exploration of lifestyle categories -



Berlin

- more relevant lifestyle categories -



Culture

- A real mix of everything
- Combination of various cultures make the city creative and vivid
- A lot of both high culture (music mainly) and popular culture (music as well)
- A lot of music, great record stores, a lot of live music
- Great museums, a lot of exhibitions
- Arts from the entire world
- Fame of Berlin Philharmony and Opera in Japan
- Generally very high quality for affordable price
- Some famous festivals - like a film festival

Definitely the key element!

City life

- A lot of going on nearly 24-hours a day
- People having fun until late night
- A lot of shopping possibilities, very good quality and good brands
- Mixed society - a feeling of tolerance, lack of boredom or monotony
- A lot of open-air events
- Parties *are everywhere*
- A possibility to find a good place for party even very late at night

Definitely another key element - a very attractive mood, unique for Berlin

Trends/ fashion

- Berlin is perceived as a trendy place
- All big brands from fashion world are present
- Setting trends in architecture
- Some connections with Japan - a fashion for Japanese cartoon visible
- But still weaker than in Scandinavia - e.g. Stockholm

Innovations are very strong in the Berlin's image

Berlin

- undefined lifestyle categories -



Food/ cuisine

- A lot of different cuisines - very wide choice
- Great selection of local beer and wine for very affordable prices
- Polarised opinion about local food - sometimes perceived as tasty (sausage, meat), sometimes - as too artificial and lacking lightness
- 170 sushi bars!

Polarised opinion about local food, but wide selection of cuisines is a definite advantage

Ecology

- Highly developed ecological attitudes and system - similar to Japanese
- General feeling of cleanness
- A lot of eco-packs, energy-saving solutions, etc.

Not a key attribute for a tourist, but very appreciated by residents

Nature

- A lot of parks, a lot of trees
- A feeling of very green city
- A guarantee that there is enough space in the park to have a rest (parks in Tokio are very crowded)

The amount of trees/ parks is very attractive, but rather on a „good European level”

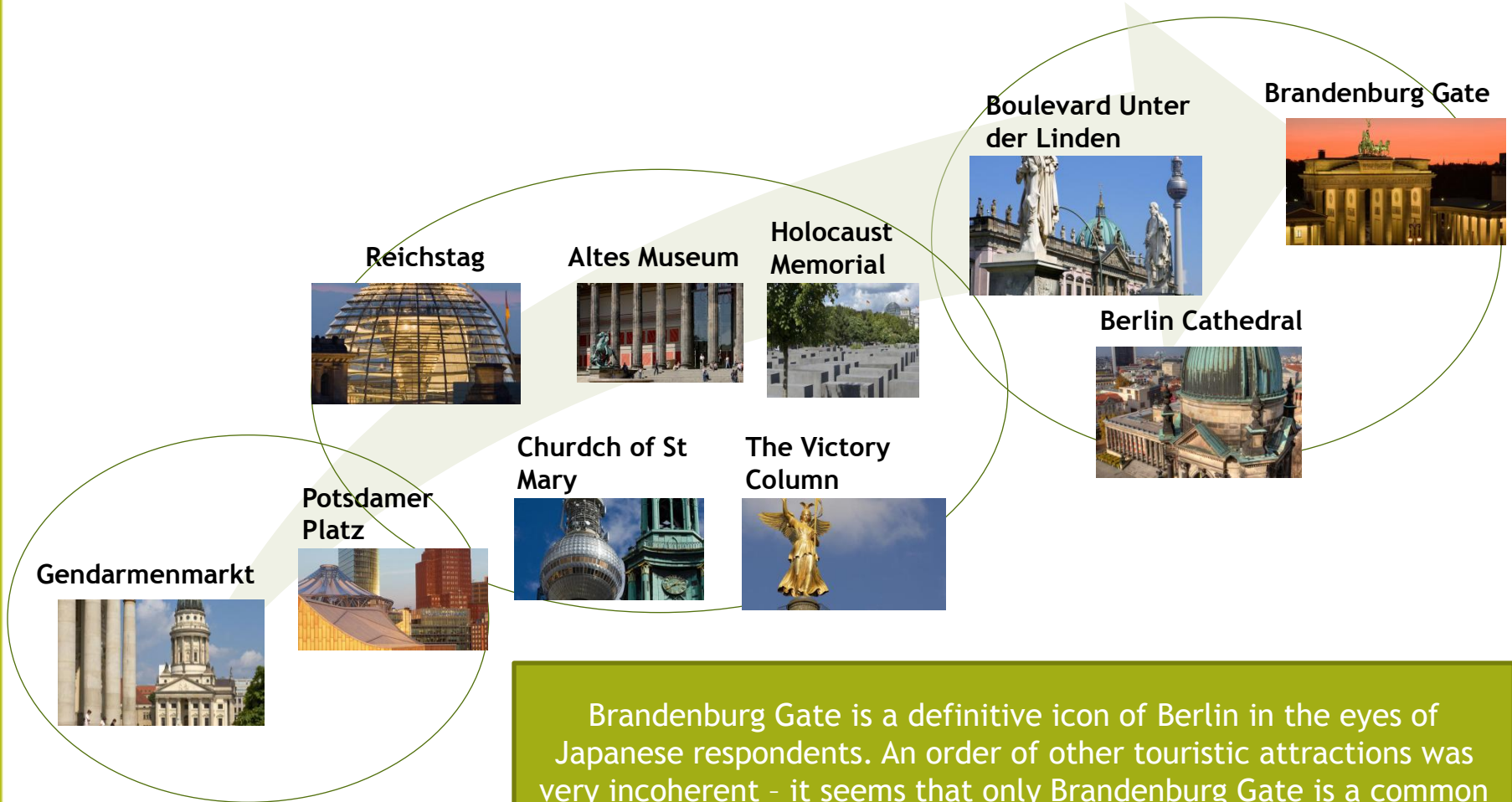
Touristic service

- General level is acceptable
- But sometimes it goes too far into freedom and lack of rules - lack of smile (even if artificial), lack of focus on the client

No problems - just typical for a modern city

Berlin

- focus on touristic sights -



Brandenburg Gate is a definitive icon of Berlin in the eyes of Japanese respondents. An order of other touristic attractions was very incoherent - it seems that only Brandenburg Gate is a common „must” out of the list presented to respondents.

Berlin

- less relevant lifestyle categories -



Leisure

- Quite a lot of such a possibilities nearby (e.g. 20 minutes by train) - to go to nature
- But less important for tourists

Elements of folk

- Rather not visible
- Regarded as not necessary because focus is on higher culture or modern art. And culture
- Nothing really specific for Berlin

Berlin

- attributes and arguments -



Attributes chosen...

to be communicated

- ❑ **CULTURE/ EVENTS**
 - Very wide offer of kinds of arts
 - Some world famous events and places
 - Can be a single reason for coming
- ❑ **INNOVATIVE CHARACTER**
 - Very much!
 - Mostly on the level of arts and architecture (e.g. Potsdamer Platz, Sony Center)
- ❑ **DESIGN/ ARCHITECTURE**
 - Very strong point
 - Berlin associated with artists, designers
 - Ku'damm as a famous street in Japan
 - Impressive beauty of new buildings, great harmony with old ones
 - Very solid and monumental - different than Japanese
- ❑ **UNIQUE CHARACTER**
 - A combination of modernity and tradition
 - Uniqueness atmosphere of freedom

- ❑ **HISTORY**
 - Some parts are interesting, but lack of willingness to „dig it”
- ❑ **NATURE**
 - Surprisingly high number of parks and trees
 - But not that important to attract tourists as such
- ❑ **SAFETY**
 - Safe
 - But this is just expected from such a modern capital of wealthy country
- ❑ **HUMAN SCALE**
 - Easy to navigate and move
 - Not boring
- ❑ **LOCATION & CONNECTIONS**
 - Accessible, especially with transfer in Helsinki
 - Convenient short trip from the airport to city centre
 - Interesting location - a „gate to Eastern Europe”, but slightly too far away from Western Europe (France or Italy)

not to be communicated

- ❑ **QUALITY OF SERVICE**
 - Proper, but nothing specific about it

Berlin

- comments -



Berlin seems to be very different than all other cities included in the project - it is definitely the most modern, most Western (in terms of lifestyle, mentality), most multicultural and open city from all.

As opposite to other cities - its history and past plays relatively smaller role - what counts in Berlin for Japanese tourists, is its presence.

It can be said that Berlin has a potential to be a kind of „condensed Europe” with its multicultural character, openness, tolerance as well as high standard of life and very high level of service.

Berlin seems to have also the widest choice of possibilities and the largest number of reasons for coming for various tourists - i.e. it can be used as a place for historical sightseeing, as a place for culture only (music), as a place for fun (clubbing).

Its size creates a completely different feeling of a city which is a big agglomeration, which lives in a hurry, in a more vivid way than all the other cities of the region.

Comparison of cities



Comparison of cities



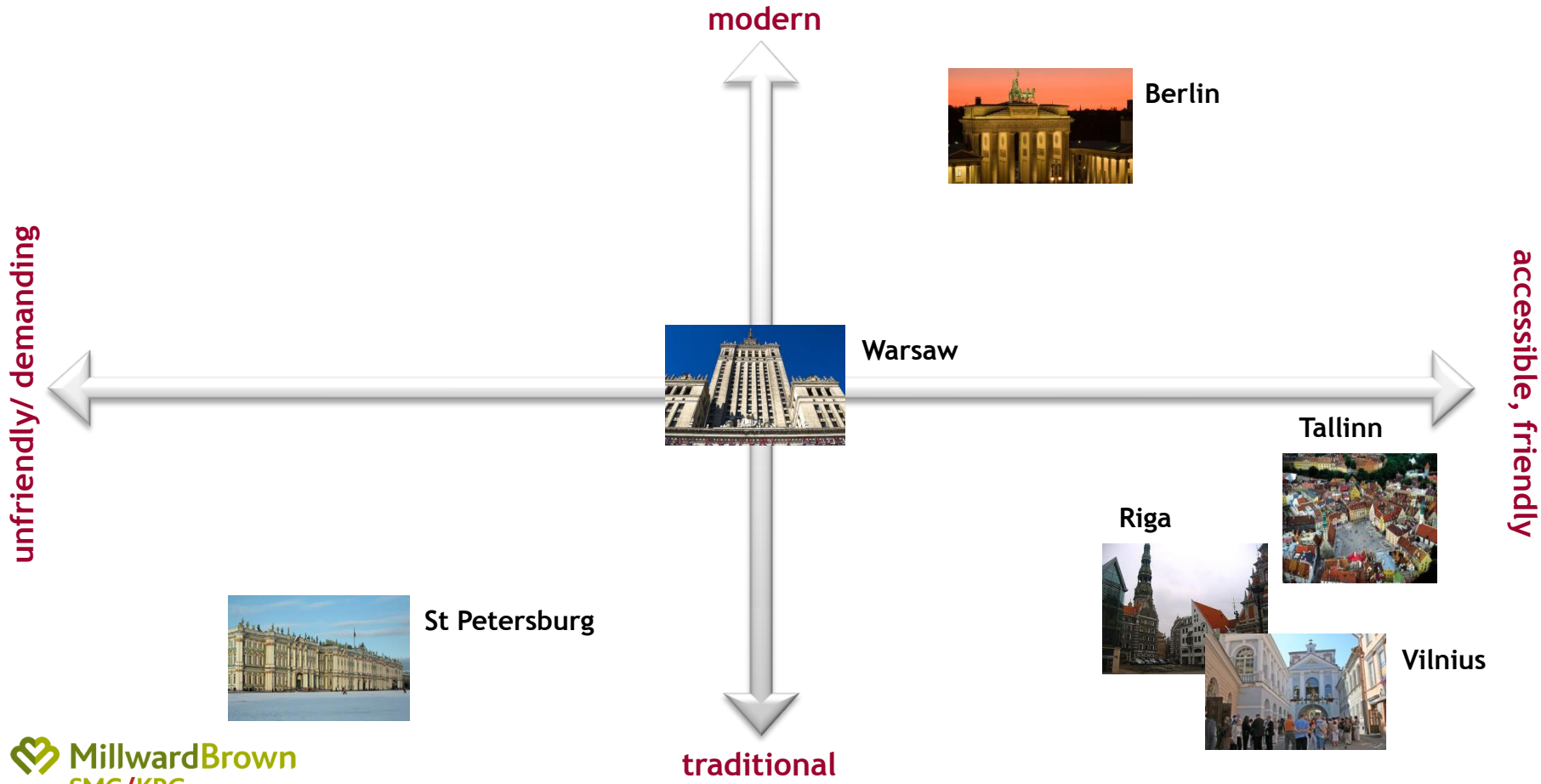
Key words and attributes describing each city:

Riga	Tallinn	Vilnius	St Petersburg	Warsaw	Berlin
					
Beautiful Old Compact Convenient Sad/ serious	Cute Medieval Compact Modern Balanced Accessible Colourful/ Disneyland	Beautiful Authentic Relaxing Calm Natural Catholic/ spiritual Mature	High culture Architecture World famous Momumental Unfriendly Dangerous Chaotic	Chopin Mixed Beautiful Green Chaotic Transforming In the middle	Freedom Tolerance Multicultural Modern International Heavy/ monumental Music

Comparison of cities



Mapping of cities on main dimensions:



Comparison of cities

- comments -



All 6 cities included in the project are impossible to be treated as a whole when thinking about communication strategy. It seems that characters, distance, satisfied needs are so different, than it should be split into:

- A group of Baltic States' capitals (Tallinn, Riga, Vilnius) as close to each other geographically, the easiest ones in terms of logistics but - what is more important - as offering a similar touristic experience, focused on beauty of traditional buildings, cosiness, compact size, accessibility, perfect size for a 1-2-days trip, focused just on „traditional Europe” kind of experience; but at the same time - not boring as each capital has its own „specific feel”
- Completely three different worlds of three other cities:
 - Sankt Petersburg as the least accessible (geographically and mentally) but offering a fame of one of the most important cities in the world and which seems to be a proposition for groups/ more experienced tourists
 - Warsaw as a specific city which is transforming and which is „in between” West and East - also a proposition for slightly more experienced tourist
 - Berlin as the most multicultural and cosmopolitan city which reflects the spirit of contemporary Europe in a most visible way - a proposition for a tourist looking for more „mainstream European” experience (fun, shopping, modernity, status)

Conclusions



The study shown a potential connected with communication of particular cities in the following areas:

- **For Tallin, Riga and Vilnius:**
- A very niche destination: something uncovered by friends yet; a lot to explore, every corner brings new beauty, new surprise
- Very convenient visits: you can see everything within 1-2 days; combined with a good service it makes it extremely convenient; can potentially be a destination for relaxing, for those who look for more passive tourism
- A combination of old Europe and cute-fairytale style and mood - the beauty of Old Towns seem to have potential especially among women
- It is not Soviet Union anymore - a chance to see how quickly world can change or come back to positive past, to roots
- A surprise - a trip to these cities can give a chance to see how different it is to what one could think and expect before
- Stressing Japanese connections - Sugihara, players in Skonto, Baruto Kaito; locally it can create interest
- UNESCO heritage itself - important and credible guidance for Japanese tourists

Conslusions (cont'd)



In case of other, more diversified cities, the following directions seem to have potential:

- **Sankt Petersburg:**
 - To focus on international fame, reminders of brilliant past
 - To stress most famous cultural elements of the offer (Hermitage, ballet) and work on their accessibility (Japanese information, etc)
 - To focus on group trips and take care of level of service in places visited
- **Warsaw:**
 - To use Chopin as a reason for coming, especially by making him (and music in general) accessible - outdoor music during summer
 - To present Warsaw as a symbol of transition, change, modernisation; to make it unique as a city in between two worlds of West and East
- **Berlin:**
 - To focus on its tolerant, multicultural character which creates a kind of „condensed modern Europe” with its openness and diversity
 - To stress music/ fun/ clubbing side of the city offer for younger tourists



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