

## A Study on the Japanese's Knowledge, Images and Beliefs of Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik

Key results and conclusions May 2019

Professor, Ph.D. **Arto Lindblom**, Aalto University, Finland arto.lindblom@aalto.fi

Adjunct professor, Ph.D. **Taru Lindblom**, Tampere University, Finland taru.lindblom@tuni.fi

Please cite: Lindblom, Arto & Lindblom, Taru (2019) A Study on the Japanese's Knowledge, Images and Beliefs of Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik. Report of key findings and conclusions.

#### **Summary of the key findings:**

This study explores the Japanese's general knowledge, images and beliefs of the Nordic capital cities: Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik. The study is based on an online survey that was conducted in Japan in April-May 2019. The data consists of over 1500 Japanese respondents' opinions.

The study reveals that all five Nordic capital cities enjoy a positive image in Japan although the respondents' general knowledge of these cities is at relatively low level. This indicates that the positive images the Japanese hold on Nordic capital cities are most likely based on affect and generic beliefs rather than actual facts and cognitive judgements.

Among the five capitals, Copenhagen has the most positive image whereas Helsinki is perceived as the most attractive travel destination. In general, the Japanese perceive all capital cities as pleasant, fun and safe travel destinations.

Past travel experiences have a significant effect on how the Nordic capital cities are perceived among the respondents. According to the results, respondents with prior travel experience to a given city have far more positive image than those who have not visited the city in question.

The differences in perceived images and beliefs across socio-demographic factors are relatively small. However, it seems that women and younger age groups have more positive images on Nordic cities than men and older cohorts.

Although the Japanese attach positive meanings to the Nordic capital cities, their actual travel intentions to visit them in the near future are still relatively low. This is an interesting finding. On the one hand, this is a clear indication of the market potential related to Nordic's travel services offered to Japanese travelers. On the other hand, this could be a sign of some obstacles preventing Japanese people from traveling to the Nordics.



#### Research questions:

- 1. What kinds of **spontaneous beliefs and images** the Japanese have on Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik?
- 2. What is the Japanese's **general knowledge** of each Nordic capital city?
- 3. What is the Japanese's **overall image** of each Nordic capital city?
- 4. What is the overall attractiveness of each Nordic capital city as travel destination among Japanese people?
- 5. What kinds of beliefs the Japanese have on Nordic capital cities as travel destinations?
- 6. How these images and beliefs are related to Japanese's likelihood to travel to Nordic capital cities?



#### About the sample:

The data was collected by an online survey in Japan between 15 April and 12 May 2019.

Online survey was promoted by the **Embassies of Denmark, Sweden, Norway, Finland and Iceland in Tokyo in their social media channels** (Twitter, Facebook). Each Embassy had their own unique online survey link that enabled following the flow of responses.

#### The final sample size is 1550 Japanese respondents.

In order to ensure the validity of data and the results, the responses are weighed according the information source (i.e. Embassies), giving each source an equal share. Thus, none of the information sources is over-emphasized in our analyses.

The questionnaire was initially prepared in English, translated to Japanese by a native Japanese speaker, and then tested with several native Japanese speakers before the launch.

As the data collection method was not based on random sample, it is obvious that the sample does not represent the whole population of Japan. Therefore, our study warrants considerations regarding how the results are generalized to all Japanese people.



#### Respondents by gender





29,3 %



70,7 %



#### Respondents by age

$$n = 355$$

$$(23,9\%)$$

$$n = 434$$

$$(29,2\%)$$

$$n = 364$$

$$(24,5\%)$$

$$n = 291$$

$$(19,6\%)$$

$$n = 42$$

$$(2,8\%)$$

\*64 respondents did not mark their age

# What kinds of spontaneous beliefs and images the Japanese have on Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik?



When you hear the word "Copenhagen", what does it bring to your mind?

#### Most popular answers\*:

The Little Mermaid, Tivoli, Andersen, Royal Copenhagen, Design, Nyhaven, LEGO, Tableware, Bicycle, Denmark, Colourful townscape, Cookies, Candies, Airport, Stroget, Noma, Hamlet.



<sup>\*</sup>preliminary list, translations might contain errors

When you hear the word "Stockholm", what does it bring to your mind?

#### Most popular answers\*:

Nobel prize, Gamla stan, Capital by the water, Sweden, Olympics, Kiki's Delivery Service, Stockholm syndrome, City Hall, IKEA, ABBA, Design, Cold weather.



<sup>\*</sup>preliminary list, translations might contain errors

When you hear the word "Oslo", what does it bring to your mind?

#### Most popular answers\*:

Munch, Fjord, the Capital of Norway, Vikings, Othello, Coffee, Cycling, the Northern Lights, Opera House, Nobel prize, Airport, University of Oslo, Oslo agreement, Cycling, Expensive.



<sup>\*</sup>preliminary list, translations might contain errors

When you hear the word "Helsinki", what does it bring to your mind?

#### Most popular answers\*:

Moomins, Cathedral, Olympics, Marimekko, Kamome Shokudo (movie and restaurant), Finnair, Sauna, Cold weather, NOKIA, Alvar Aalto, Kaurismäki, Santa Claus, Stockmann, Hakaniemi, Tram, Esplanade street, Helsinki Railway station.



<sup>\*</sup>preliminary list, translations might contain errors

When you hear the word "Reykjavik", what does it bring to your mind?

#### Most popular answers\*:

The Northern Lights, Iceland, Church of Hallgrimur, Volcano, Geyser, Hot spring, the Capital of Iceland, Nature, Vikings, Björk, Colorful townscape.

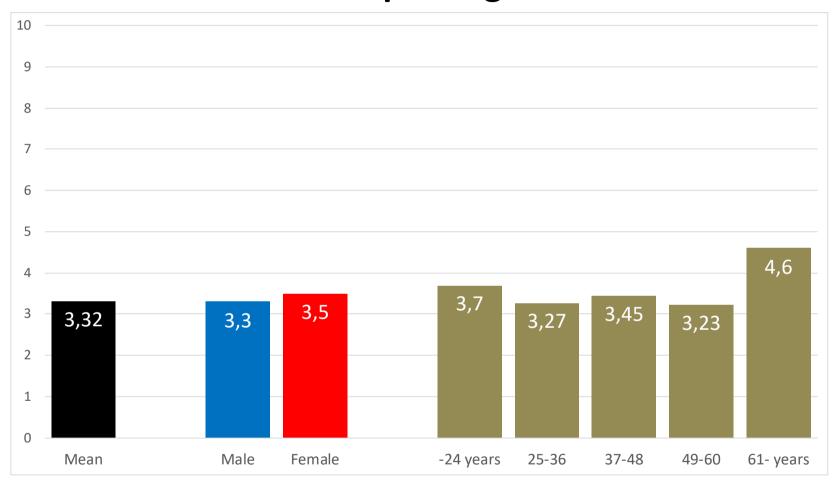


<sup>\*</sup>preliminary list, translations might contain errors

## What is the Japanese's **general knowledge** of Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik?

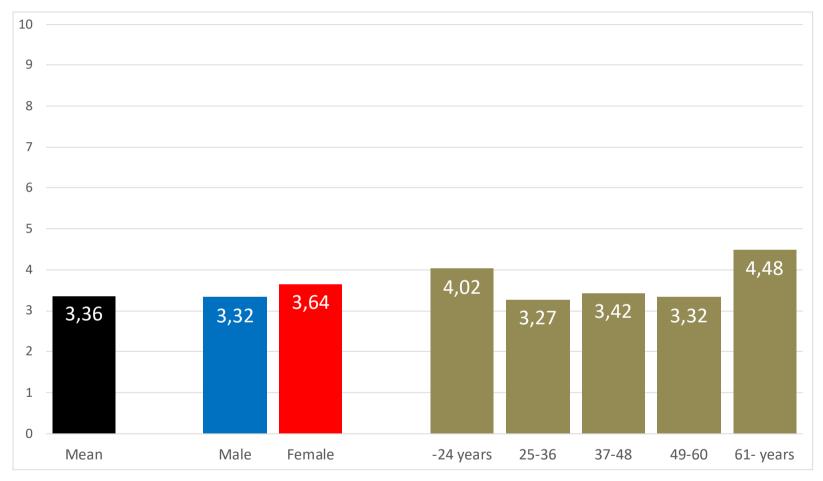


## How would you describe your general knowledge on **Copenhagen**?



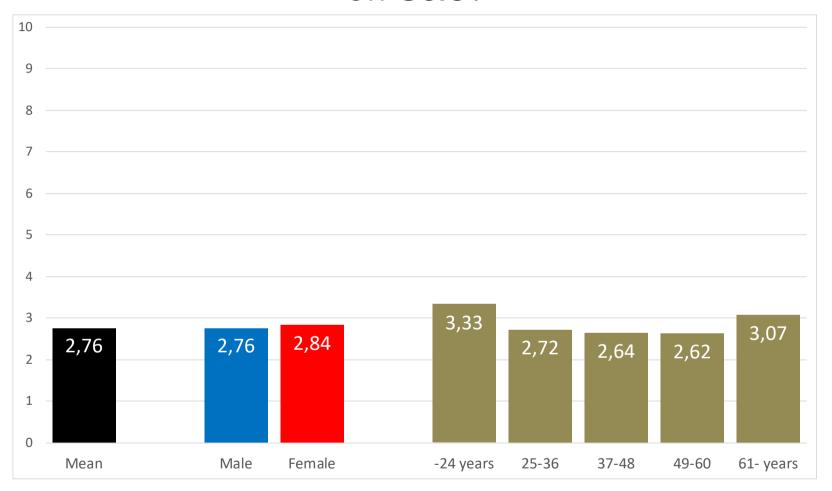


## How would you describe your general knowledge on **Stockholm**?



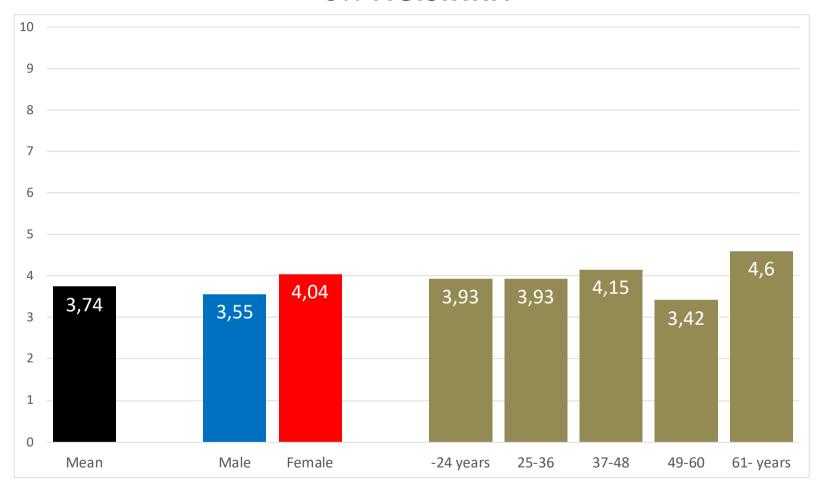


## How would you describe your general knowledge on **Oslo**?



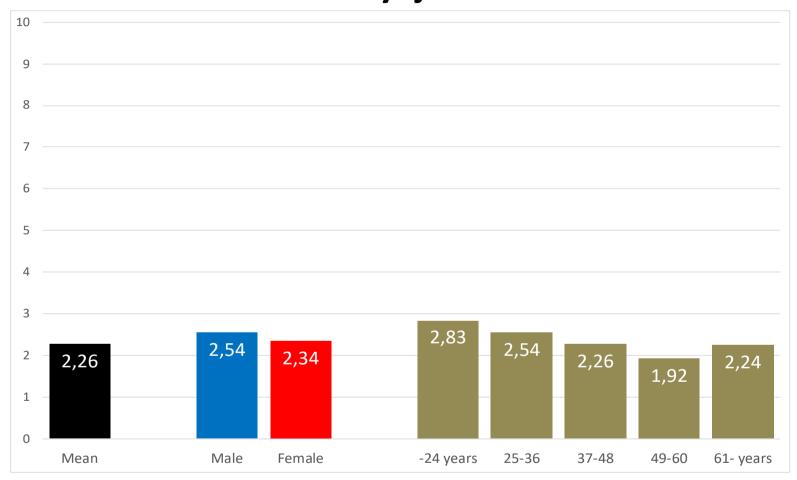


## How would you describe your general knowledge on **Helsinki**?



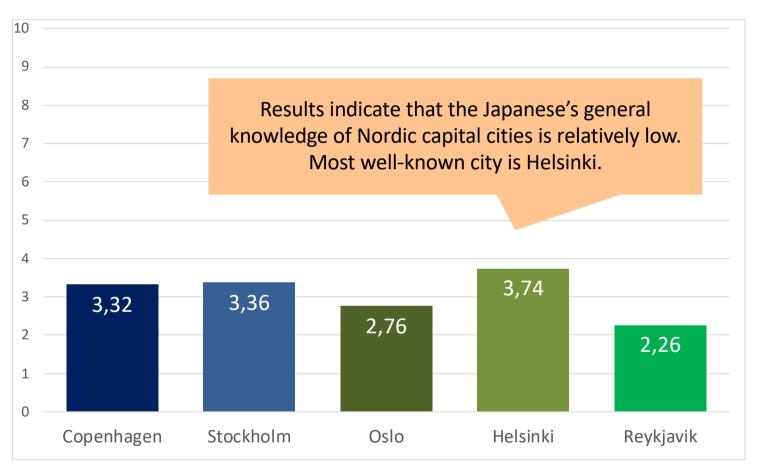


## How would you describe your general knowledge on **Reykjavik**?





## Comparison of the Japanese's general knowledge of Nordic capital cities

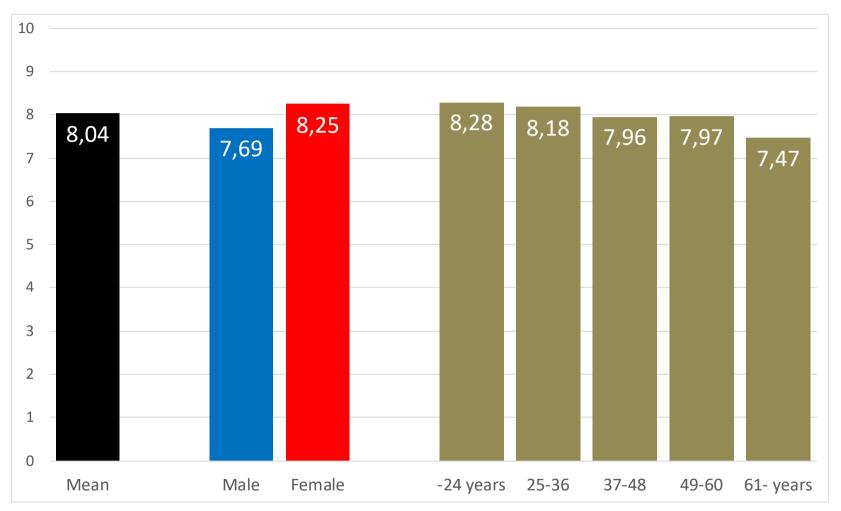




## What is the **overall image** of Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik among the Japanese?

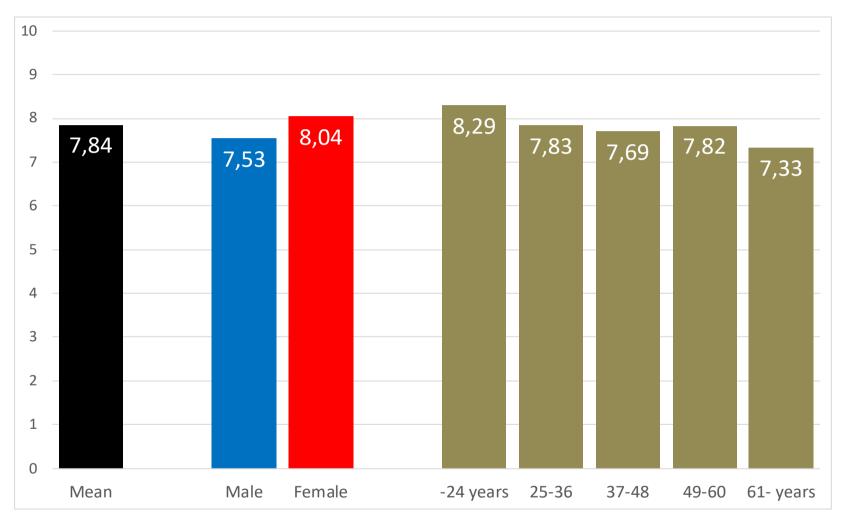


#### What is your overall image of Copenhagen?



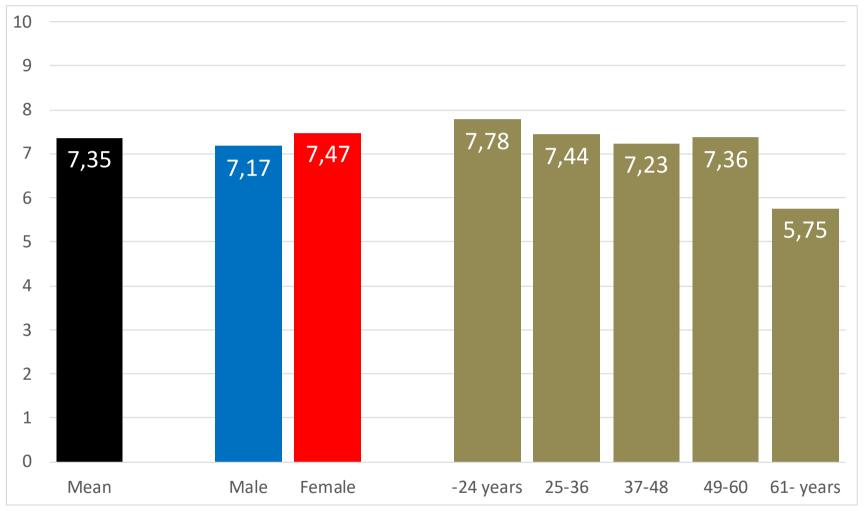


#### What is your overall image of **Stockholm**?



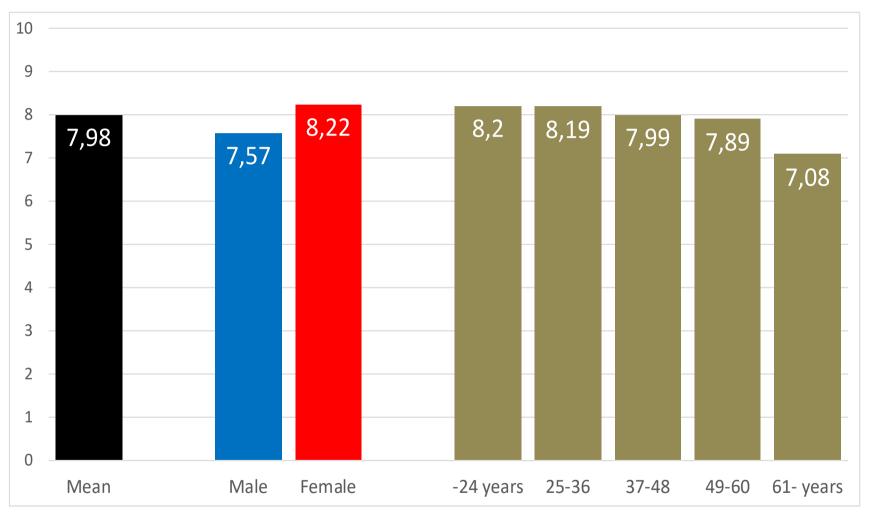


#### What is your overall image of Oslo?



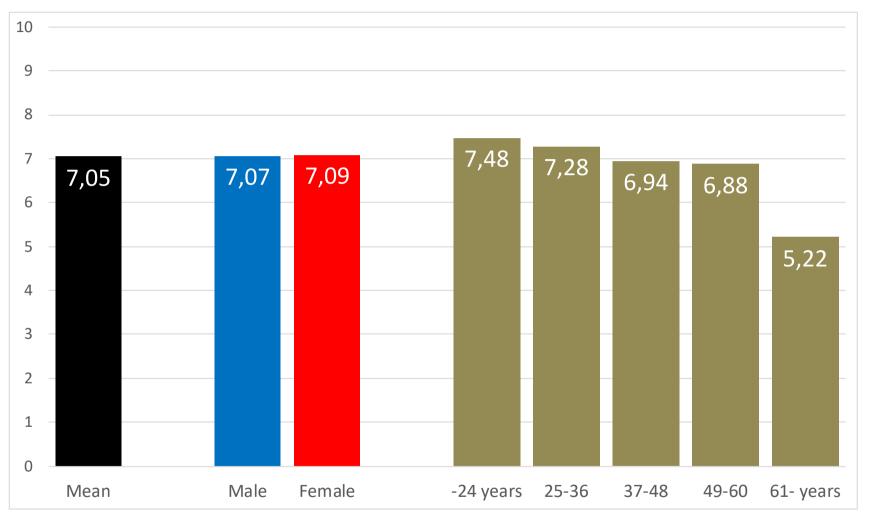


#### What is your overall image of Helsinki?



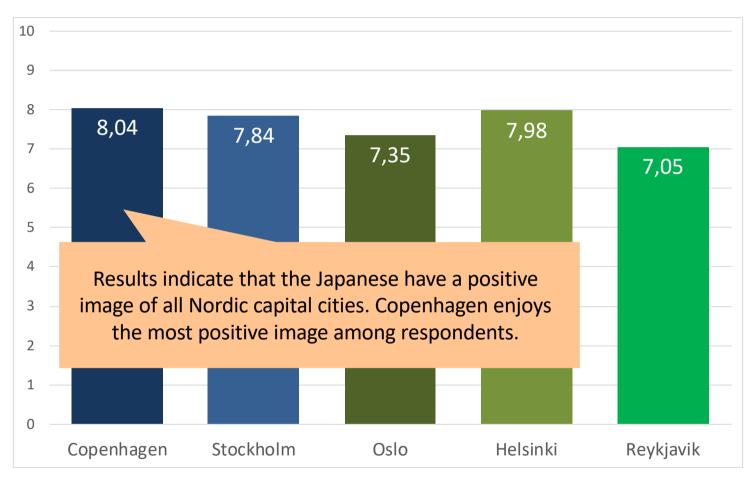


#### What is your overall image of Reykjavik?





## Comparison of Japanese's overall images of Nordic capital cities





### Japanese's general knowledge of the city is positively correlated to the overall image that they hold on the city

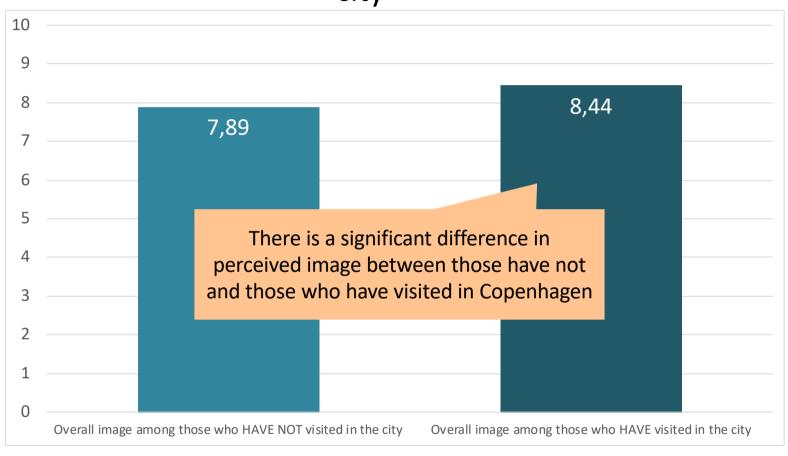
General knowledge	.304	Overall image of
of Copenhagen		Copenhagen
General knowledge	.338	Overall image of
of Stockholm		Stockholm
General knowledge of Oslo	.406	Overall image of Oslo
OI OSIO		OSIO
General knowledge of Helsinki	.445	Overall image of Helsinki
OI HEISIIIKI		HCISITIKI
General knowledge of Reykjavik	.538	Overall image of
		Reykjavik



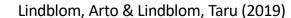
<sup>\*\*</sup> Correlation is significant at the 0.01 level (2-tailed)



## Comparison of the Japanese's overall image of **Copenhagen** between those who HAVE NOT and those who HAVE visited in the city

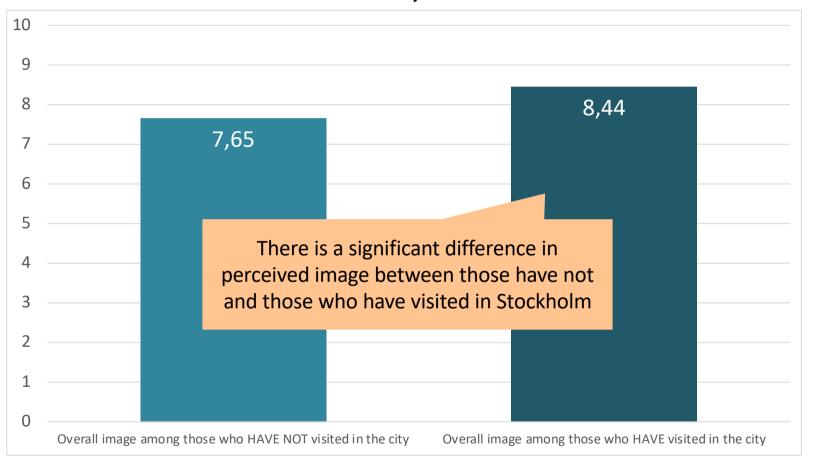






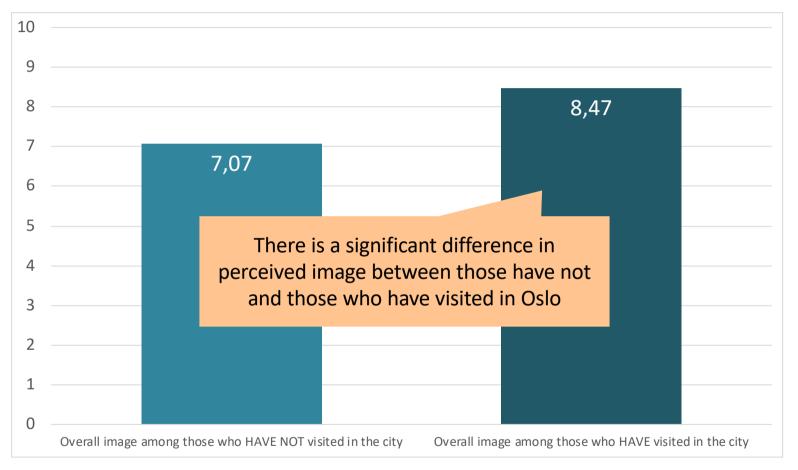


## Comparison of the Japanese's overall image of **Stockholm** between those who HAVE NOT and those who HAVE visited in the city



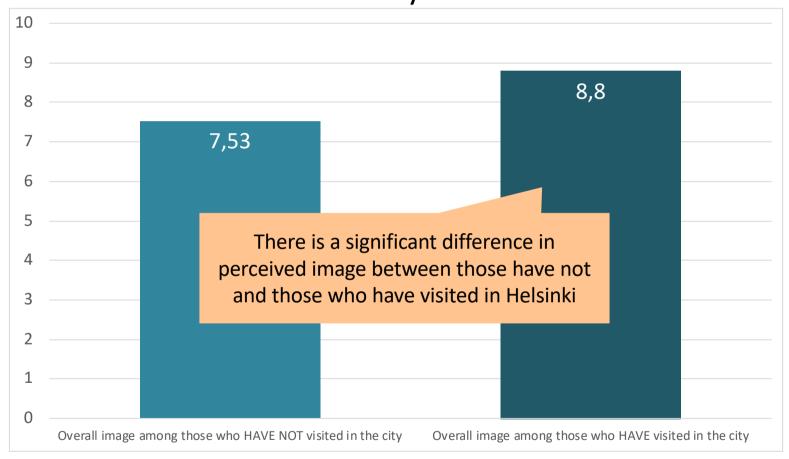


### Comparison of the Japanese's overall image of **Oslo** between those who HAVE NOT and those who HAVE visited in the city



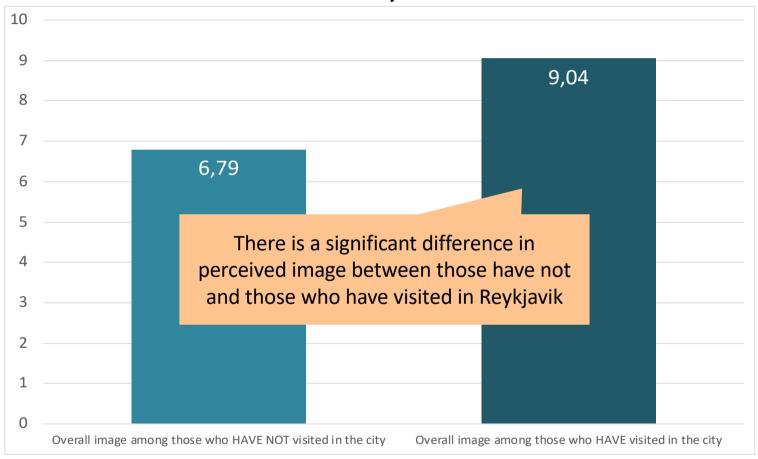


## Comparison of the Japanese's overall image of **Helsinki** between those who HAVE NOT and those who HAVE visited in the city





## Comparison of the Japanese's overall image of **Reykjavik** between those who HAVE NOT and those who HAVE visited in the city

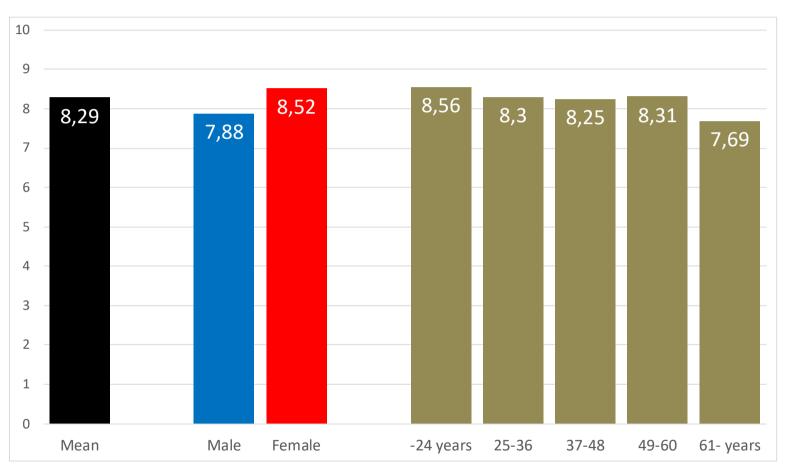




What is the **overall** attractiveness of Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik as travel destinations among the Japanese?



## Based on your own beliefs, how attractive is **Copenhagen** as a travel destination?

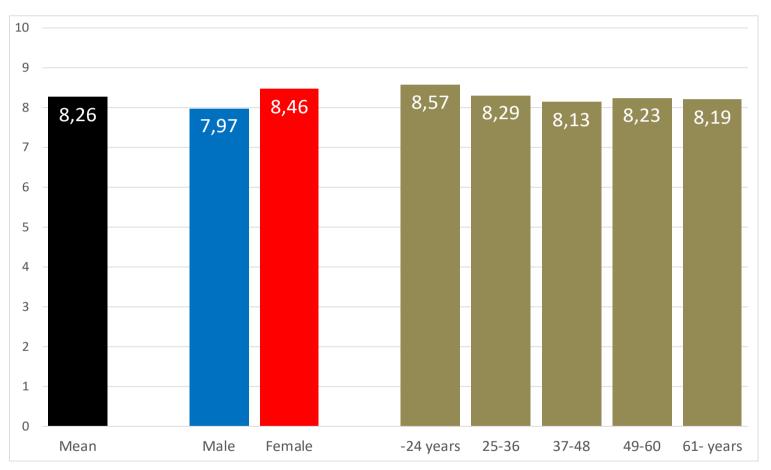


11-point scale: 0 = not at all; 10 = very attractive





## Based on your own beliefs, how attractive is **Stockholm** as a travel destination?

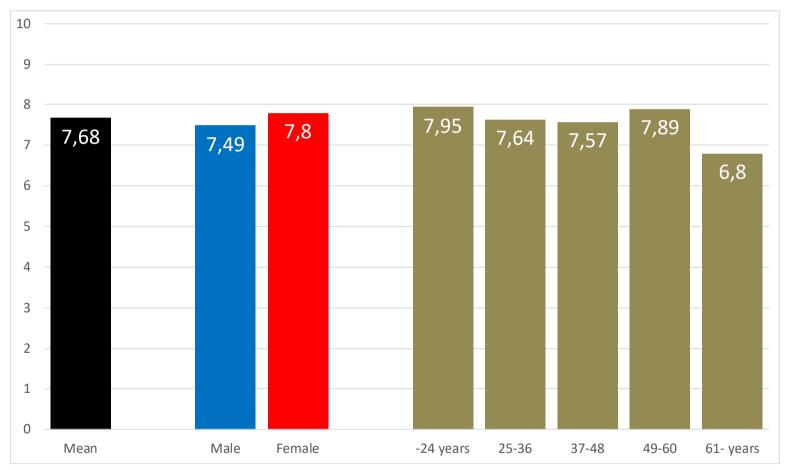


11-point scale: 0 = not at all; 10 = very attractive

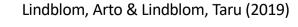




## Based on your own beliefs, how attractive is **Oslo** as a travel destination?

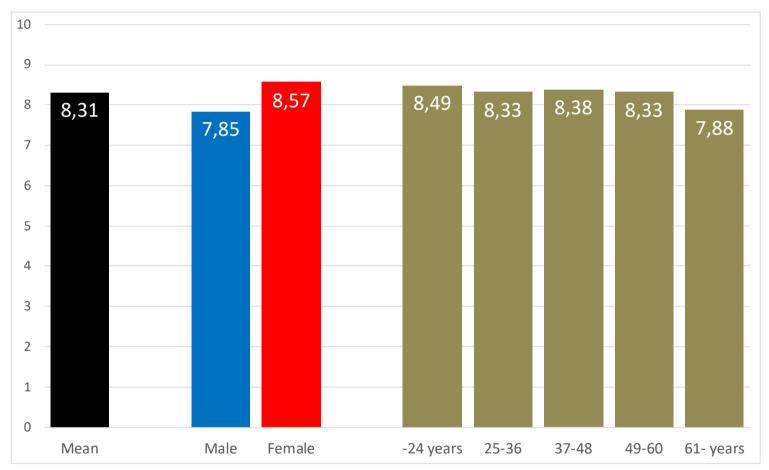


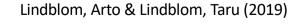
11-point scale: 0 = not at all; 10 = very attractive





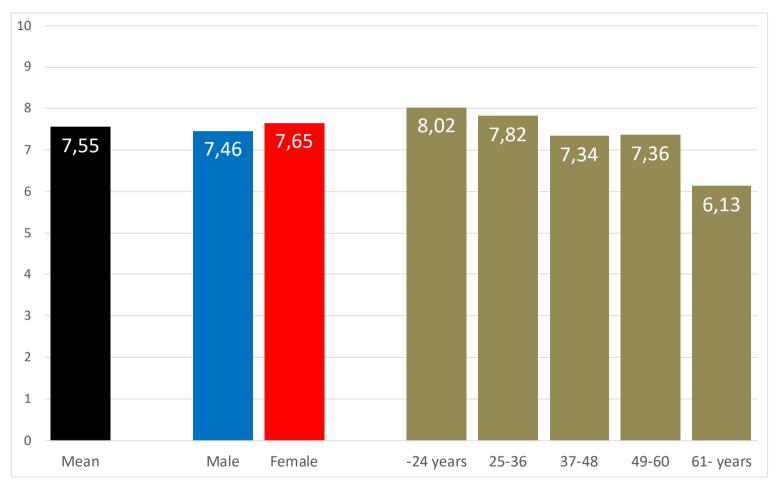
# Based on your own beliefs, how attractive is **Helsinki** as a travel destination?





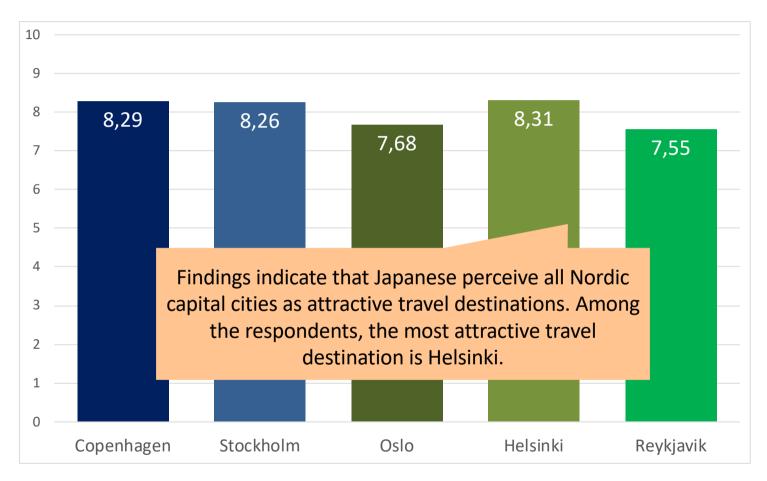


# Based on your own beliefs, how attractive is **Reykjavik** as a travel destination?





# Comparison of **overall attractiveness** of Nordic capital cities as travel destinations



11-point scale: 0 = not at all; 10 = very attractive

Lindblom, Arto & Lindblom, Taru (2019)



#### Japanese's general knowledge of the city is positively correlated to the perceived attractiveness of the city

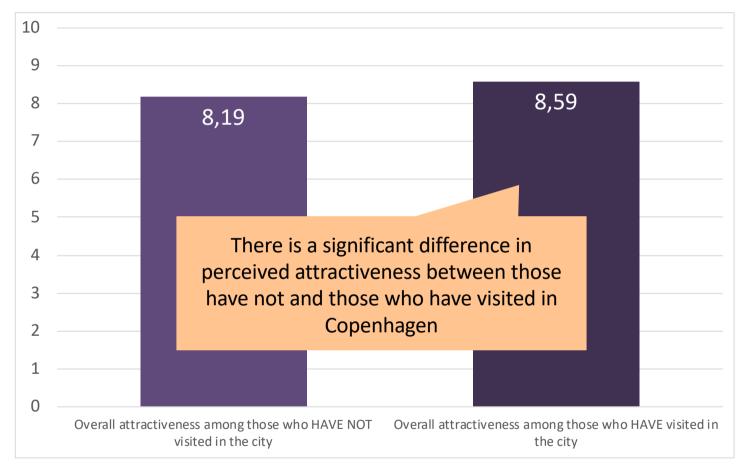
General knowledge	.205	Overall attractiveness of	
of Copenhagen		Copenhagen	
General knowledge	.321	Overall attractiveness of	
of Stockholm		Stockholm	
General knowledge	.321	Overall attractiveness of	
of Oslo		Oslo	
General knowledge	.367	Overall attractiveness of Helsinki	
of Helsinki		Heisiliki	
General knowledge	.452	Overall attractiveness of	
of Reykjavik		Reykjavik	





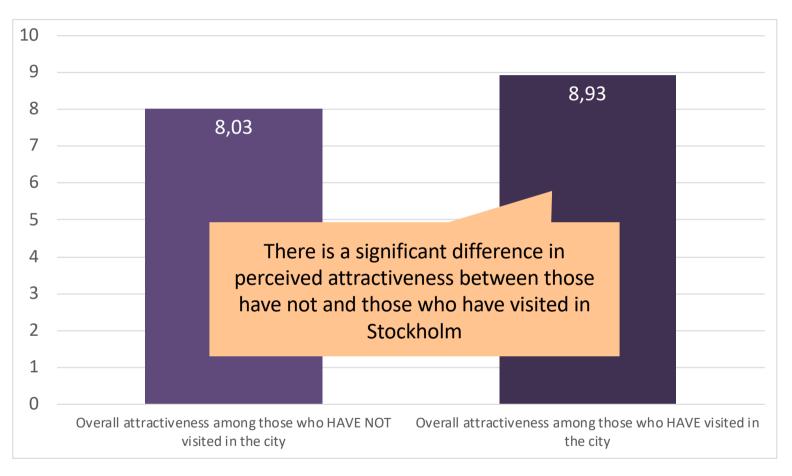
Lindblom, Arto & Lindblom, Taru (2019)

### Comparison of **Copenhagen's** overall attractiveness between those who HAVE NOT and those who HAVE visited in the city





# Comparison of **Stockholm's** overall attractiveness between those who HAVE NOT and those who HAVE visited in the city

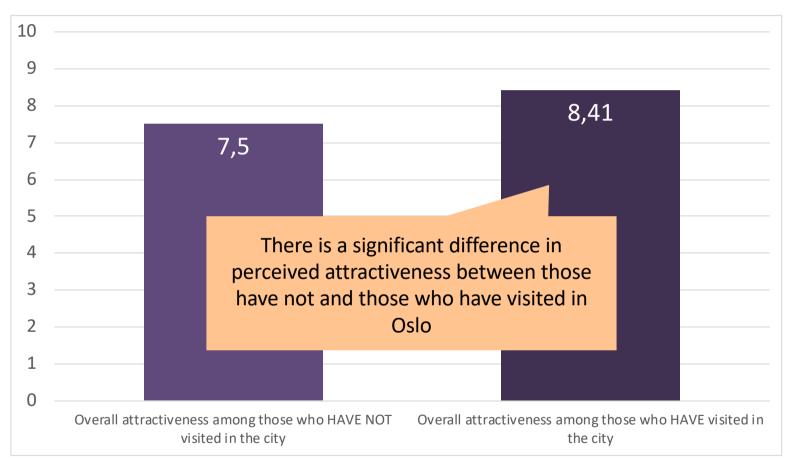








# Comparison of **Oslo's** overall attractiveness between those who HAVE NOT and those who HAVE visited in the city

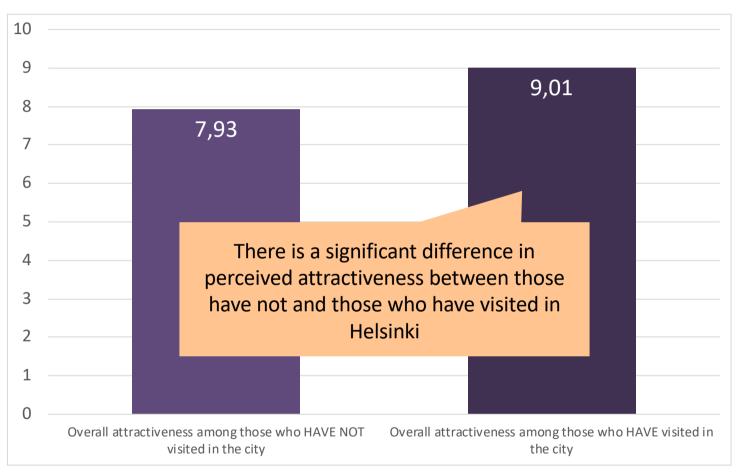








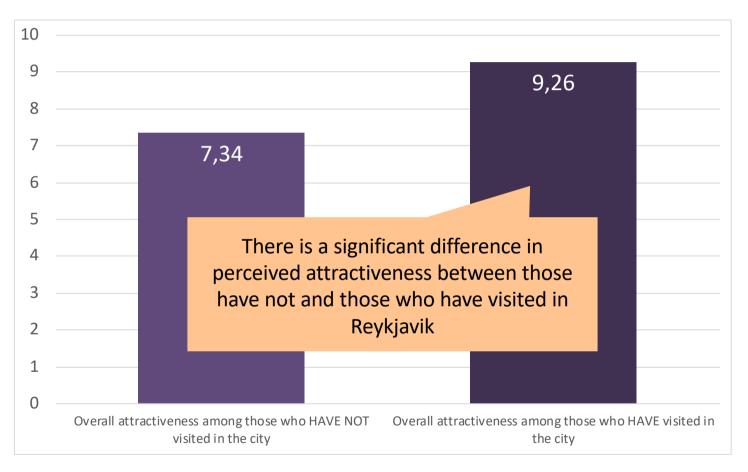
### Comparison of **Helsinki's** overall attractiveness between those who HAVE NOT and those who HAVE visited in the city



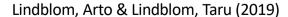




# Comparison of **Reykjavik's** overall attractiveness between those who HAVE NOT and those who HAVE visited in the city





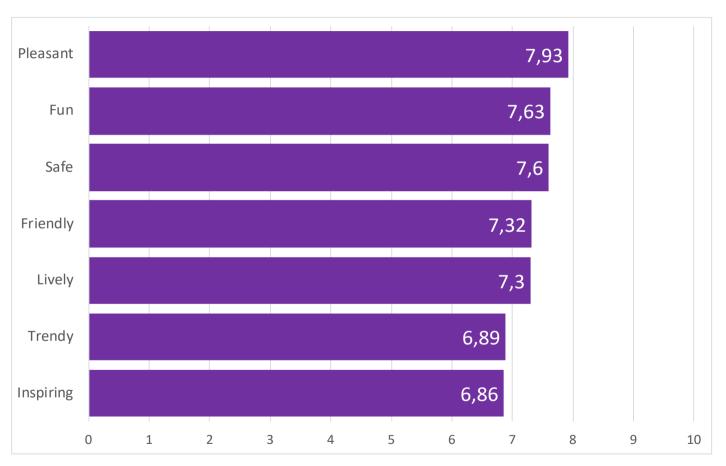




What kinds of **destination attributes** Japanese people
attach to Copenhagen,
Stockholm, Oslo, Helsinki and
Reykjavik?

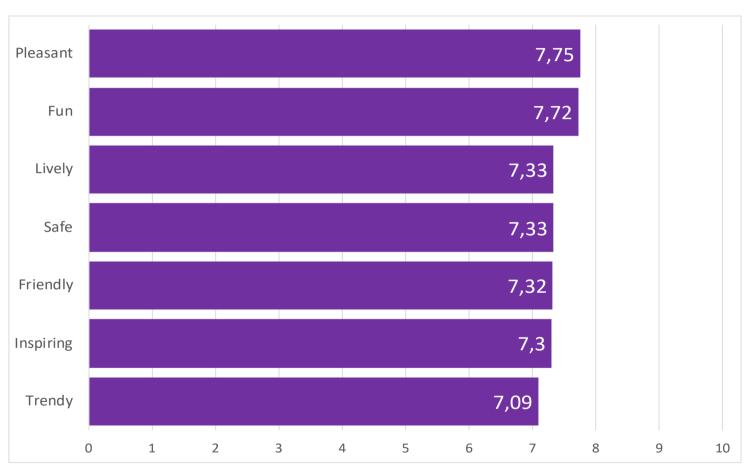


# Based on your own beliefs, please evaluate **Copenhagen** according to following attributes



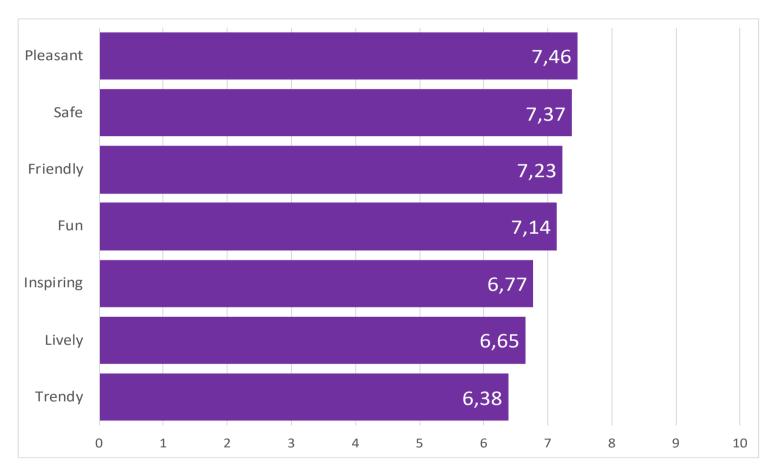


# Based on your own beliefs, please evaluate **Stockholm** according to following attributes



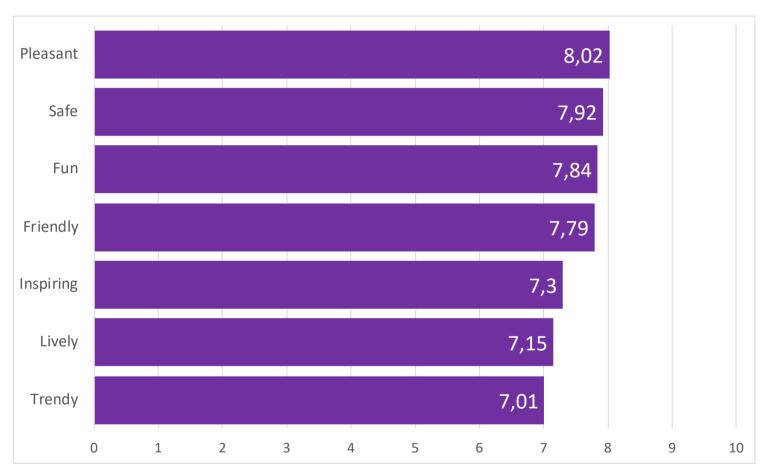


# Based on your own beliefs, please evaluate **Oslo** according to following attributes



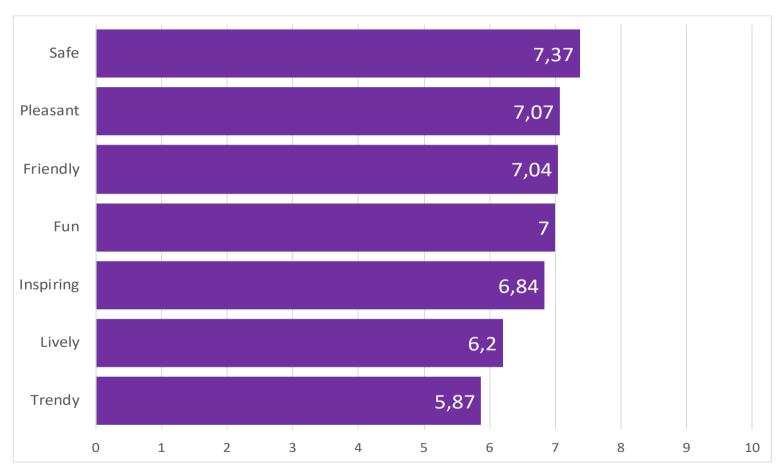


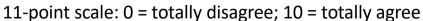
# Based on your own beliefs, please evaluate **Helsinki** according to following attributes





# Based on your own beliefs, please evaluate **Reykjavik** according to following attributes







# Comparison of **destination attributes** among those who HAVE NOT and among those HAVE visited the city

#### City images across destination attributes among those who HAVE NOT visited the city

	SAFE	FUN	INSPIRING	PLEASANT	LIVELY	FRIENDLY	TRENDY
СРН	7.56	7.51	6.85	7.81	7.10	7.13	6.67
STO	7.21	7.45	7.11	7.49	7.02	7.09	6.80
OSLO	7.14	6.93	6.65	7.22	6.50	7.00	6.21
HEL	7.45	7.45	7.08	7.51	6.79	7.33	6.59
REY	7.12	6.78	6.70	6.87	6.07	6.84	5.75

#### City images across destination attributes among those who HAVE visited the city

	SAFE	FUN	INSPIRING	PLEASANT	LIVELY	FRIENDLY	TRENDY
СРН	7.68	7.85	6.86	8.15	7.68	7.69	7.29
STO	7.59	8.30	7.72	8.33	8.00	7.84	7.72
OSLO	8.20	7.88	7.19	8.34	7.18	8.05	6.95
HEL	8.67	8.43	7.63	8.81	7.69	8.49	7.67
REY	9.10	8.53	7.77	8.37	7.12	8.40	6.64



These findings show how differently the Japanese perceive the cities depending on whether they have visited the city or not. Reykjavik is a destination that exceeds the Japanese's expectations positively in many regards.

# **Top Nordic capital across the destination attributes** among those who HAVE NOT and among those HAVE visited the city

Among those who **HAVE NOT** visited in the city

Among those who **HAVE** visited in the city

Safe	Copenhagen	Reykjavik
Fun	Copenhagen	Reykjavik
Inspiring	Stockholm	Reykjavik
Pleasant	Copenhagen	Helsinki
Lively	Copenhagen	Stockholm
Friendly	Helsinki	Helsinki

Stockholm



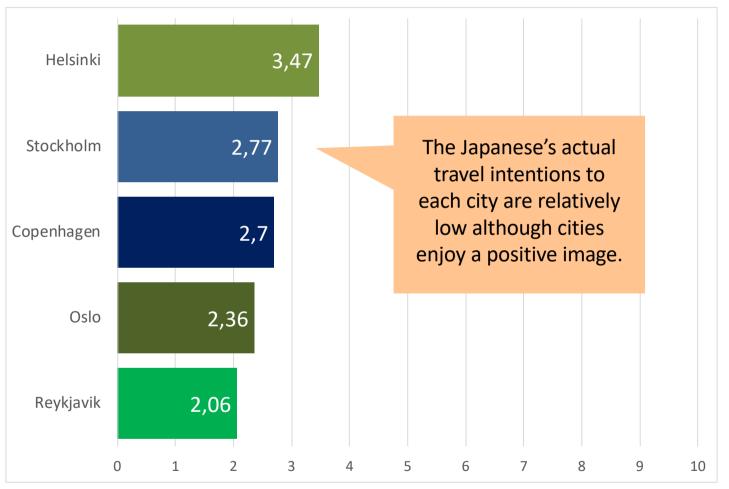
**Trendy** 

Stockholm

# What is the Japanese's intention to travel to Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik?



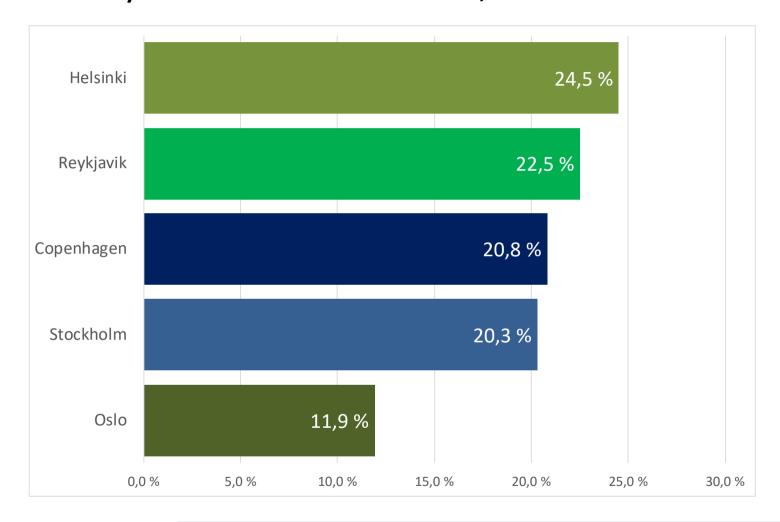
# Likelihood that you will travel to the following cities within the next 12 months



11-point scale: 0 = very low; 10 = very high



# If you would have to choose just one city from these five cites to your travel destination, what would it be?





#### Destination attributes that are most strongly related to Japanese's intentions to travel to the Nordic capital cities

Fun (.22**) Friendly (.21**)	Likelihood to travel to Copenhagen
Fun (.24**) Friendly (.22**)	Likelihood to travel to Stockholm
Pleasant (.23**) Friendly (.22**)	Likelihood to travel to Oslo
Pleasant (.28**) Safe (.26**)	Likelihood to travel to Helsinki
Fun (.28**) Inspiring (.28**)	Likelihood to travel to Reykjavik



Lindblom, Arto & Lindblom, Taru (2019)



#### Conclusions



#### Key conclusions:

- The Japanese's general knowledge of Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik is relatively low.
- Although general knowledge is limited, the Japanese have a positive image of the Nordic capital cities and perceive these five cities as attractive travel destinations. This finding indicates that the Japanese's images are primarily loaded with affection and based on general beliefs rather than actual facts and cognitive judgements.
- Copenhagen has the most positive image among the whole sample whereas
   Helsinki is perceived as the most attractive travel destination.
- Among the respondents, women and youngest groups have the most positive images of the Nordic capital cities. However, differences between demographic groups are relatively small.



#### Key conclusions:

- One interesting finding is that those Japanese who have visited the Nordic capital cities have more positive impression on these cities than those who have not. This indicates that the Japanese's expectations are generally exceeded when they visit the Nordics. In particular, Reykjavik is a city that far exceeds Japanese expectations positively in many aspects.
- Although the Japanese have positive images on all five Nordic capital cities, their actual travel intentions to these cities are surprisingly low. This raises questions of the reasons why Japanese's likelihood to travel to the Nordic capital cities is not any higher. Are there some (hidden) obstacles that decrease the likelihood to choose the Nordic city as travel destination?
- Lastly, should the Japanese choose only one capital city where to travel in the Nordics, Helsinki comes in first place and Reykjavik comes in second.



#### Some managerial challenges to tackle:

- How to turn the Japanese's positive images of the Nordic cities into actual travel flow?
- What are the key drivers (or possible obstacles) for the Japanese travelers to choose (or not to choose) the Nordic cities as their travel destinations?
- Are there some target groups that Nordic cities should focus on? If so, what would be the most attractive target groups, and why?
- What should be the Nordic cities key messages and "selling arguments" to the Japanese travelers?
- How to enhance collaboration between the Nordic cities? Should there be joint marketing campaigns or some co-created travel packages?



#### Further research avenues:

- Qualitative studies could provide new insights on Japanese travelers' opinions, beliefs and attitudes toward the Nordic cities. These qualitative studies could be conducted in three phases: pre-visit, during-visit and post-visit.
- In addition, it would be interesting to conduct comparative studies in other Asian countries (e.g. in China, South-Korea, Singapore) to understand how Japanese travelers' images potentially differ from other Asian traveler groups.
- In addition, city images and destination beliefs are not the only cues that affect individuals' decision-making and destination choices. Therefore, in further studies, there is a need to create more comprehensive frameworks that also take into account other contextual and situational factors that might influence individuals' travel-related behavior.



# Summary of the key findings of each city



#### Key findings related to Copenhagen

- Copenhagen has **the most positive overall image** of all Nordic capital cities (mean 8,04). The image is particularly positive among Japanese females and younger age groups.
- Copenhagen is **the second most attractive travel destination** of Nordic capital cities (mean 8,29). Copenhagen attracts more Japanese females and youths than Japanese males and older age groups.
- The Japanese feel that **Copenhagen is pleasant, fun and safe** city.
- Copenhagen's overall image is significantly better among those Japanese who have visited the city than among those who have not visited.
- The Japanese's actual travel intentions to Copenhagen are relatively low. Should the respondents choose only one capital city where to travel in the Nordics, Copenhagen comes in third place.
- Copenhagen is especially known for The Little Mermaid and Tivoli. The respondents also relate cycling to Copenhagen.



#### Key findings related to **Stockholm**

- Stockholm has **the third most positive overall image** of all Nordic capital cities (mean 7,84). The image is particularly positive among Japanese females and younger age groups.
- Stockholm is also **the third most attractive travel destination** of Nordic capital cities (mean 8,26). Stockholm attracts Japanese females, youths and young adults.
- The Japanese feel that Stockholm is pleasant, fun and lively city.
- Stockholm's overall image is significantly better among those Japanese who have visited the city than among those who have not visited.
- The Japanese's **actual travel intentions to Stockholm are relatively low**. Should the respondents choose only one capital city where to travel in the Nordics, Stockholm comes in fourth place.
- Stockholm is especially known for Gamla Stan and the City Hall. The Japanese also relate water to Stockholm.



#### Key findings related to Oslo

- Oslo has the fourth most positive overall image of Nordic capital cities (mean 7,35).
- Oslo is **the fourth most attractive travel destination** of Nordic capital cities (mean 7,68). Japanese females and youths are slightly more interested in Oslo than Japanese males and older age groups.
- Japanese feel that Oslo is pleasant, safe and friendly city.
- Oslo's overall image is significantly better among those Japanese who have visited in the city than among those who have not visited.
- Japanese's **actual travel intentions to Oslo are low**. Should the respondents choose only one capital city where to travel in the Nordics, Oslo comes to last fifth place.
- Oslo is especially known for Munch and Opera House. Many Japanese also relate coffee to Oslo.



#### Key findings related to Helsinki

- Helsinki has the second most positive overall image (mean 7,98).
   Helsinki attracts particularly Japanese females, youths and young adults.
- Helsinki is **the most attractive travel destination** of Nordic capital cities (mean 8,31). Helsinki attracts particularly Japanese females. All age groups are interested in Helsinki.
- Japanese feel that Helsinki is pleasant, safe and fun city.
- Helsinki's overall image is significantly better among those who have visited the city than among those who have not visited.
- Japanese's actual travel intentions to Helsinki are relatively low. Should the respondents choose only one capital city where to travel in the Nordics, Helsinki is in the pole position. This indicates that Helsinki is a sort of dream destination in the Nordics for many Japanese.
- Helsinki is especially known for the Cathedral and Kamome Shokudo.



#### Key findings related to Reykjavik

- Reykjavik has **the fifth most positive overall image** of Nordic capital cities (mean 7,05)
- Reykjavik is **the fifth most attractive travel destination** of Nordic capital cities (mean 7,55). Reykjavik attracts both Japanese males and females. Interest is the highest among youths.
- Japanese feel that Reykjavik is safe, pleasant and friendly city.
- Reykjavik's overall image is significantly better among those who have visited
  the city than among those who have not visited. In fact, Reykjavik scores
  highest overall image points among the five capitals by those with prior travel
  experience. This indicates Reykjavik exceeding Japanese travelers' expectations
  to a large extent.
- Japanese's **actual travel intentions to Reykjavik are low**. However, should the respondents choose only one capital city where to travel in the Nordics, Reykjavik comes in second place.
- Reykjavik is especially known for the Church of Hallgrimur and colorful townscape. The Japanese also relate hot springs and volcanos to Reykjavik.



#### Research team



#### **Arto Lindblom**

Professor, Ph.D.

**Aalto University School of Business Marketing Department** 

arto.lindblom@aalto.fi

Areas of teaching and research expertise:

- Retail Marketing and Management
- Retail Business Models
- Platform Economy and Global Marketplaces
- Retail Entrepreneurship
- Consumer Behavior





#### **Taru Lindblom**

#### Adjunct Professor Post doc researcher, Ph.D.

**Tampere University** 

taru.lindblom@tuni.fi

#### Areas of teaching and research expertise:

- Sociology of culture and lifestyle
- Sociological perspectives of leisure consumption
- Sociology of food
- Cross-cultural studies
- Urban lifestyle
- Tourism





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