# CHINESE TOURISTS ARE ALL KINDS OF TRAVELLERS

## 2016 SURVEY OF CHINESE TOURISTS IN THE NORDIC CITIES

# THE CHINESE ARE ALL KINDS OF TRAVELLERS

What you are about to read is not a report about the Chinese tourist. This report is about chinese travellers as a heterogeneous group with different interest in culture, history and food. They are travelling in groups, with their families or as independent travellers. They are touring historic sites, discovering local culture and they are visiting relatives.
The Chinese travellers come in all kinds

Since 2013, when Wonderful Copenhagen published the first report on Chinese visitors, the Chinese market has been booming. China's outbound travel market has continued its impressive growth and reached 135 million outbound travellers by 2016 according to UNWTO. The number of Chinese bednights in the four capitals in the Nordic countries, Denmark, Sweden, Norway and Finland, has increased by 12,8% from 2015 to 2016.
The numbers speak for themselves, but there is more to it. New travel segments are making their way to the Nordic region, and we need to adapt our approach to a diversified market with different kinds of travellers with different preferences and demands.

However, there are common characteristics that can guide destinations in working with the Chinese travel market. However, it is important to keep in mind that the Chinese travel market is rapidly changing with travel experience on the rise and travel preferences diversifying.

This report presents the results of the largest survey of Chinese travellers carried out in Copenhagen, Stockholm, Helsinki and Gothenburg. This survey follows up on a survey carried out in 2012 to ensure that we stay close and updated on the experiences, demands and desires of Chinese guests. The study demonstrates the strong, joint potential of the Nordic region (or rather BeiOu - 北欧 - as the Nordic region is referred to in China) as well as the common challenges.

The Chinavia project started as a pilot project in 2012 where insights from the survey formed the basis of the project activites. Since then, the project has grown into a solid and continuous cooperation between several Nordic destinations highlighted by both the European Commission and the OECD as 'best practice'.
These Nordic destinations set af good example of how joining forces can ensure both a sustained and improved market effort and market position for all.

We look forward to sharing new insights on Chinese travellers to our Nordic region, made possible by the support of the Chinavia partners and contributors: Tourism in Skåne, Malmö Tourism, Göteborg & Co, Visit Stockholm, Helsinki Marketing, Destination Fyn Network, Visit Sweden, City of Copenhagen and the Capital Region of Copenhagen. They have all been part of making the Chinavia cooperation strong and are continuously pushing the cooperation further.
Happy reading!

# INDEX

# INTRODUCTION

TODAY, CHINA IS THE WORLD'S LARGEST OUTBOUND TRAVEL MARKET. THE NORDIC DESTINATIONS ARE BOTH ACCESSIBLE AND VISIBLE TO MORE AND MORE CHINESE TRAVELLERS, WHO LOOK FURTHER AND WIDER FOR NEW TRAVEL DESTINATIONS. THIS IS A RESULT OF NEW INITIATIVES SUCH AS THE OPENING OF NEW VISA CENTERS IN CHINA AND NEW DIRECT FLIGHT CONNECTIONS AS WELL AS AN INCREASED ATTENTION TO THE DENMARK-CHINA TOURISM YEAR. ONLY A SMALL SHARE OF THE CHINESE MARKET REACHES EUROPE AND THE NORDIC REGION TODAY, BUT THE PAST YEARS' DOUBLE-DIGIT GROWTH RATES ACROSS THE NORDIC CITIES DEMONSTRATE THE CHINESE TRAVEL MARKET'S HIGH POTENTIAL AND CONTINUOUS DEMAND FOR DESTINATIONS' FOCUSED ATTENTION.

## PREVIOUS SURVEYS OF CHINESE VISITORS IN THE NORDIC COUNTRIES

This study explores the Chinese visitors travelling to today's Nordic countries, following up on results from previous surveys conducted in 2012 and 2014.

In 2012, the first survey of Chinese visitors was carried out with 700 Chinese travellers. They were interviewed in Stockholm, Helsinki or Copenhagen. The 2012 study portrayed the Chinese visitors' positive perception of the Nordic countries and illustrated that especially the serenity and tranquillity found in not only cities but also in the countryside appealed to the visitors. The survey also reflected the barriers and problems experienced by the Chinese visitors. The survey demonstrated that language barriers, lack of Chinese information and poor service resulted in a perception of the Nordic destinations as inaccessible and inconvenient for the Chinese visitors.
These results formed the basis for the future work to be carried out in the following years by the joint Nordic project, Chinavia.

In 2014, an updated visitor survey of 400 Chinese visitors was carried out in Copenhagen. Results from the survey found that the Chinese visitors increasingly travelled independently. In 2012, 82% travelled in a group and in 2014, the share of Chinese visitors travelling in group was down to 56%, matching an increase in the share of independent travellers from 18% in 2012 to 44% in 2014.

The preferences and expectations of the Chinese visitors have also developed. Today, the Chinese visitors demonstrate an even greater curiosity towards experiecing local specialties.

## THE CHINAVIA SURVEY 2016

In this report, we present the results of the latest visitor survey conducted in the four Nordic cities, Stockholm, Helsinki, Copenhagen and Gothenburg, in August and October/November 2016.
This is the largest survey sample to date with a total of 1,496 respondents. The questionnaire resembled the original questionnaire from 2012 with a few corrections and amendments to enable comparison across time.

# KEY FINDINGS

THE PURPOSE OF THIS NEW STUDY HAS BEEN TO ACHIEVE UPDATED INFORMATION ABOUT THE CHINESE VISITORS TRAVELLING TO THE NORDIC CITIES, AS THE CHINESE OUTBOUND TRAVEL MARKET HAS SEEN RAPID CHANGES OVER THE LAST YEARS. THESE RESULTS ARE IMPORTANT INPUTS TO THOSE WORKING WITH THE MARKET. THE MAIN FINDINGS OF THE STUDY HAVE BEEN SUMMARIZED BELOW.

## A SHIFT FROM GROUP TRAVELLERS TO INDEPENDENT TRAVELLERS

Two overall types of travel segments were predominant in the study, namely group travellers and independent travellers. The group traveller segment is made up by more inexperienced travellers, often visiting Europe for the first time consisting of older respondents (45+ years). Contrary, the independent travel segment is made up by more adventurous and experienced younger travellers.

Whilst the independent travel segment is not new to Nordic cities, the share of independent travellers is rapidly growing. 54% of the respondents in this study were independent travellers, compared to 41% in 2012. Hence, there is a clear shift towards the Chinese traveller becoming a more independent traveller. The fact that approximately half of the respondents in this survey are independent travellers is in line with the current development in the Chinese travel market where more and more Chinese travellers explore the world on their own.

Despite the shift toward more independent travellers, there are no indications that the group travel segment will disappear. The Chinese travel market is booming, and new inexperienced first-time travellers will seek to travel to the Nordic countries.  Results from this study specifically show that respondents who had never been to Europe before, were more likely to travel in a group.

## TRAVELLERS BECOME BETTER ACQUAINTED WITH EUROPE

The Chinese travellers who visit the Nordic countries are becoming more experienced travellers. More and more Chinese travellers have visited Europe before. Across all respondents in the 2016 survey, 63% had been to Europe prior to this journey, which is an increase in comparison to the 2012 survey where 55% had been to Europe before. In the 2016 survey, Copenhagen was the city with the largest proportion of Chinese travellers who visited Europe for the first time, while Helsinki was the city with the lowest number of Chinese travellers who visited Europe for the first time.

## MANY DESTINATIONS INCLUDED IN THE ITINERARIES

In general, Chinese visitors visited more than one city on their trip to the Nordic region. The average duration of a trip was close to 10 days, while the average stay in the city of interview was between 2.1 – 2.3 days.

The largest number of respondents (21%) visited 4 cities, but almost just as many visited a total of 5 cities on their trip. The average number of cities visited was 3.94. In general group travellers visited more cities than individual travellers.

The most common combination of cities visited was Helsinki, Stockholm and Copenhagen, as reported by 53% of respondents. In the capital of Norway, Oslo, almost every other (46%) of the respondents had visited all four capital cities in the Nordic countries in a combined trip. Almost one in four (23%) had combined their visit to the Nordic region with other European destinations. The tendency to combine a visit to the Nordic region with a visit to other European destinations increased with number of times that the respondents had visited Europe. Especially Saint Petersburg in Russia was frequently mentioned as a destination that was combined with the Nordic destinations.

## INFORMATION IN CHINESE IS STILL ESSENTIAL

Although Chinese travellers are becoming more experienced travellers, information in Chinese is still important. The need for information in Chinese is crucial among the older segments, but declines by age. On average, 63% of the oldest segments found information in Chinese (online or printed) very important while only 25% of the young respondents rated information in Chinese as important. Despite travelling in a more organised manner, respondents travelling by group still found information in Chinese much more important than independent travellers. This can be understood in relation to the fact that the respondents travelling in a group in general also were less experienced travellers and therefore may have a greater need to guidance.

## HOTEL WAS A POPULAR CHOICE

Hotel was the most common choice of accommodation among Chinese visitors. Mostly younger respondents chose alternative options of accommodation as Airbnb. At hotels, particularly free Wi-Fi and hotel amenities were rated as important.

## INTERNET IS THE MAIN SOURCE OF INFORMATION

Printed tourist information and/or city maps in Chinese was the most important source of information while at the destination. However, online activities both prior (in the planning stage) and during the journey have increased significantly compared to findings from the previous surveys. Internet searching prior to the journey was very common among respondents. The internet has clearly become the main source of information. Social media were an important source to share information. As many as 85% posted information about their trip on social media. This is a significant increase compared to the survey in 2012, where 67% posted information about their trip on social media. The preferred media used to post information, were WeChat, followed by Weibo.

## RECOMMENDATIONS FROM FRIENDS/FAMILY ARE INFLUENTAL

Personal recommendations have shown to be a key influence when Chinese visitors are planning their journeys. As many as 45% of the respondents planned their journey based on recommendations from friends and family, and 72% found it either important or very important to get recommendations from friends when planning a journey.

## HIGH CULTURAL CONSUMPTION

The Chinese visitors were very busy when visiting the Nordic cities. Sightseeing and dining were the top two activities. However, many (75%) also visited museums. A large number of respondents (76%) also tried local food while in the Nordic cities. Trying local food was particularly popular among the younger respondents. Shopping for souvenirs and local design items was also very popular. Visiting famous must-sees was important to all respondents, but the older respondents in general found it more important than the younger respondents. 81% in the age group 55-64 years answered that visiting "must-sees" was "very important" while only 47% in the youngest group saw this as "very important". This points to a possible shift in expectations and activities among the younger respondents, as they might increasingly search for other things to do than the "must-sees".

Respondents mentioned going to the theatre/opera/ballet, renting a bike or attending a concert as activities they would like to have done during their visit but did not, amongst others due to lack of awareness and information about these options.

## HIGH LEVEL OF SATISFACTION

The Chinese visitors were well-prepared and had many expectations for their trip. Nevertheless, results show a high level of satisfaction with their visit to the Nordic cities, both in terms of accommodation and service levels. The greatest difference between levels of satisfaction was caused by age difference and/or travel preferences. The younger respondents were in general more satisfied than the older, and independent travellers were in general more satisfied than groups. Finally, most respondents expressed a great interest in returning to the city, in which they were interviewed.

# KEY RECOMMENDATIONS

THE CHINESE TRAVEL MARKET IS UNDERGOING RAPID CHANGES AND TOURISM BUSINESSES NEED TO ADAPT TO THE CHANGING AND DIVERSIFYING PREFERENCES AND DEMANDS OF CHINESE TRAVELERS. IN THE FOLLOWING CHAPTER, WE HAVE OUTLINED KEY RECOMMENDATIONS FOR NORDIC DESTINATIONS AND SERVICE PROVIDERS TO KEEP IN MIND, WHEN WORKING WITH THE CHINESE VISITOR SEGMENT AND TRAVEL MARKET.

## DESTINATIONS NEED TO FOCUS ON BOTH GROUP TRAVELLERS AND INDEPENDENT TRAVELLERS

The number of independent travellers has been on the rise over the past years. This development towards more independent travel is very clearly identified in the results of this 2016-survey.

Meanwhile, there is no reason to believe that group travel will be disappearing in the coming years, not least due to the mere size of the Chinese market.

The Chinese travel market continues to boom, and destinations are increasingly becoming more accessible due to easier visa access and new direct flight connections from multiple parts of China. Therefore, we will continue to see new travellers with less travel experience, exploring the world in the comfort and safety of a group travel format.

The group travellers' preferences of Chinese language information, amenities in hotels and availability of Chinese-speaking service staff should therefore not be disregarded.

Furthermore, the survey has revealed a potential to attract former group travellers since a high number of group travellers have shown interest in revisiting the Nordic destinations as independent travellers.

Destinations also need to ensure that they provide sufficient inspiration for independent travellers, who on average stay 1.2 nights longer in each city compared to the group travellers, as seen in this survey.

## ENABLE AND ENCOURAGE CHINESE VISITORS TO SHARE TRAVEL EXPERIENCES

This survey has revealed that the internet has become the main source of information and that social media were an important source to share information. Furthermore, the survey has demonstrated that recommendations from friends and family were very influential.

Therefore, destinations need to ensure that Chinese visitors return with positive experiences and enable as well as encourage Chinese visitors to share travel experiences with their personal network.

## FREE WI-FI AND AMENITIES INFLUENCE THE PLANNING AND BOOKING

The importance of WIFI and amenities in hotels very clearly stand out in the survey results, across all age groups. Wi-Fi as well as amenities are very tangible areas for improvement and are not difficult to implement for most accommodation providers.

It is also recommended to ensure availability of Chinese-speaking staff or printed information in Chinese. The importance of Chinese-speaking staff was most prevalent among the older respondents, however also important to the younger respondents travelling by group.

Hotels and other accommodation providers could also consider providing printed information in Chinese about the destination to ensure a more positive experience for their Chinese guests.

Several respondents had a long list of activities, they wanted to seek out, but they did not do so because they lacked information about these activities. By providing more information, Chinese visitors can make the most of their visit and return with even more positive recommendations.

## LOCAL RESTAURANTS HAVE POTENTIAL

The survey has shown that a high number of respondents have tried local food and have rated this as a positive experience. If the restaurants can reflect the local atmosphere as well, this will be valued by the Chinese travellers.

Travelling off the beaten track was also very important for most respondents. Therefore, it will be intriguing for the Chinese visitors to visit a restaurant with a local atmosphere, which serves local food and is placed away from the beaten track.

## THEATERS AND STAGES SHOULD MAKE THEMSELVES VISIBLE TO THE VISITORS

76% of the respondents stated that they would have liked to go to the theatre, opera or ballet during their stay, but among other things, they lacked information and awareness of these possibilities.
75% stated that they were interested in going to a concert.
Altogether, the Nordic cities participating in this survey can offer a wide range of events within the fields of music and performance. Results from this survey demonstrate that it will be valuable to make cultural activities more visible and accessible to the Chinese visitors.
In addition, the Chinese visitors specifically asked for more information about renting a bike.

In Copenhagen, city bikes are very popular, and bikes are located all over the city. The possibility for Chinese visitors to explore the city by bike is therefore easily accessible. The results point to a potential for more Chinese visitors to make use of this option, if sufficient information regarding this is provided.

## COOPERATION BETWEEN NORDIC DESTINATIONS IS CRUCIAL

Finally, results from this survey emphasize the importance of cooperation between the Nordic destinations.
The overall average duration of a trip was close to 10 days for the Chinese visitors. 84% visited more than one city on their trip, and the average of cities visited was 3.94.
This underlines the fact that Nordic destinations are not mono-destinations. Therefore, it is crucial that the Nordic destinations share experiences and work together in a joint effort to ensure, that the Chinese visitors have a great experience when visiting the Nordic destinations.

# METHODOLOGY

THE CHINAVIA SURVEY FROM 2016 IS THE LARGEST SURVEY ABOUT CHINESE VISITORS OF THE NORDIC REGION. DATA WERE COLLECTED AT THREE CAPITAL AIRPORTS AND IN ONE LARGER CITY. IN TOTAL, CLOSE TO 1,500 CHINESE VISITORS WERE INTERVIEWED. ALL ANSWERED THE SAME QUESTIONNAIRE WITH A FEW LOCAL QUESTIONS THAT WERE CITY-SPECIFIC.

## DATA COLLECTED AT FOUR DIFFERENT LOCATIONS

Data were collected at the three main capital airports; Copenhagen Airport, Stockholm Arlanda Airport and Helsinki Airport as well as in the city of Gothenburg.

Questions specifically regarding Malmö were included in the questionnaire for Copenhagen airport. This survey has also focused on Odense/Funen in Denmark, but a specific version of the questionnaire was developed to carry out this part of the survey. Results from the survey focusing on Odense/Funen is presented in a separate report, due to big differences in the data collection format and method.

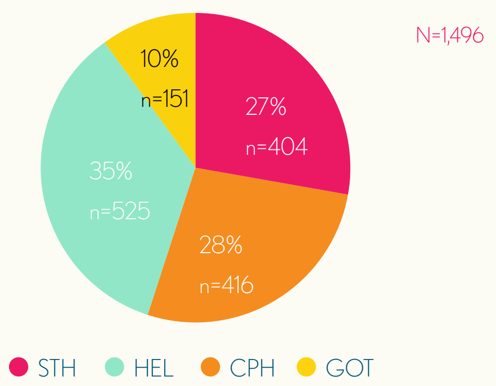
Most of the data were collected in July and August 2016. Additional data were collected in October to ensure greater data reliability and cover a broader segment of the Chinese travellers visiting the Nordic Region.
As will be shown throughout the report, many Chinese travellers combine several Nordic destinations as part of their travel itinerary. Meanwhile, the results of this report refer to the experiences of Chinese visitors travelling to the Chinavia cooperation partners, representing cities and regions in the three Nordic countries of Denmark, Sweden and Finland.

## SAMPLE SIZES VARY

Each capital city has a survey sample of around 400 respondents, and in Gothenburg, the sample includes 151 respondents.

The sample size in Helsinki is slightly larger with 500 respondents. An additional number of respondents was included to validate some open answers collected in August. For the same reason, the sample for Helsinki has a greater share of respondents in October than in the other cities.
In total, 1,496 respondents took part in the survey.
The respondents from the summer season made up 65% of the total sample, while the remaining 35% were collected in the fall within the same year.

### SHARE OF SURVEY SAMPLES BETWEEN CITIES



## INTERVIEWS CONDUCTED IN CHINESE

A professional team of Chinese-speaking interviewers conducted the interviews with an iPad. Respondents could fill in the questionnaire themselves with an interviewer nearby to assist.

Screening questions ensured respondents had indeed visited the city in question and that they were Chinese residents.
In total, 1,496 respondents passed the screening and completed the survey.

## VALIDATING HELSINKI DATA

The first collection of data carried out in the airport of Helsinki was found to have been disturbed by a generic 'fill-in' form on the iPads, meaning that as the respondents started typing, the iPad would suggest examples of answers based on what had previously been answered by other respondents.

To ensure reliability, data was compared to data from the other cities, and an additional data collection was conducted in Helsinki. This comparison and the new data collection have ensured that all answers submitted and included in the analysis are valid.

## DATA ANALYSIS

Various segmentations were tested to discover possible difference between the respondents. Across the whole data set, differences between age groups and differences between travellers with different preferences, with regards to travelling in a group or travelling independently, were statistically significant.

Throughout the report, we highlight findings that are statistically significant, with a p-value  not higher than 0.05 (P-value is the probability that two variables correlate. If the p-value is lower than 0.05 the correlation is accepted as the two variables with 95% probability will be dependent on one another).  Differences that are not statistically significant, but still interesting, are highlighted to explain possible differences or similarities.

# PROFILING THE CHINESE VISITOR

UNDERSTANDING OUR CHINESE VISITORS STARTS BY UNDERSTANDING THEIR KEY DEMOGRAPHIC CHARACTERISTICS. IN THIS CHAPTER WE PROVIDE AN OVERVIEW OF CHINESE VISITORS IN THE NORDIC DESTINATIONS. WE WILL BE LOOKING ACROSS AGE GROUPS, ORIGIN, EDUCATION AND TRAVEL PREFERENCES IN TERMS OF TRAVEL COMPANIONSHIP AND DEGREE OF INDEPENDENT PLANNING. THESE ASPECTS HAVE SEEN CONSIDERABLE CHANGE SINCE THE FIRST SURVEY WAS CARRIED OUT IN 2012, AND THE LARGER SAMPLE SIZE IN THIS YEAR'S SURVEY PROVIDES EXTRA DIMENSIONS TO OUR UNDERSTANDING OF THE CHINESE VISITORS.

## SLIGHTLY MORE FEMALE THAN MALE RESPONDENTS

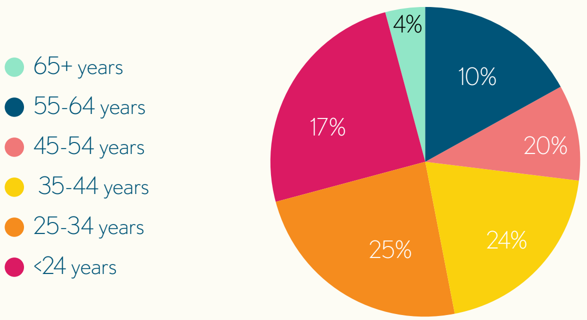
Overall, almost the same number of women (52%) and men (48%) took part in this survey. However, in both Helsinki and Gothenburg, a larger share of male respondents was represented. This is most likely due to the fact that these cities had many business travellers, and this survey reveals that the majority of business travellers were men.

## YOUNGER IN COPENHAGEN AND OLDER IN GOTHENBURG

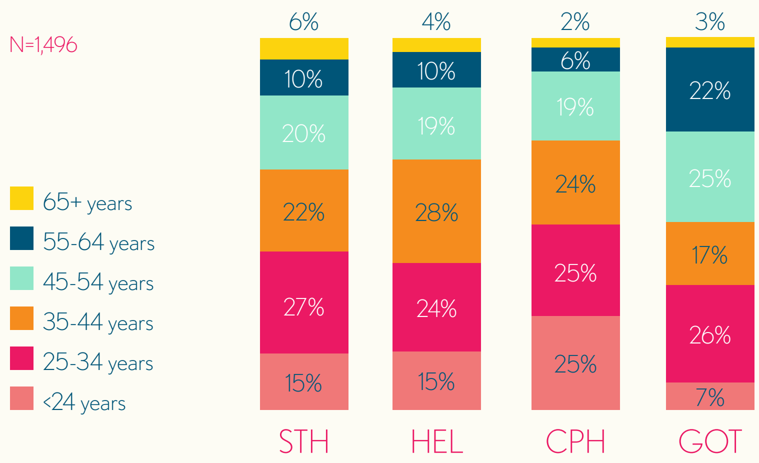
The largest age group among respondents was the 25-34-year-old travellers, closely followed by the 35-44-year-old travellers. 69% of all respondents were aged between 25-54 years old.
There was a significant difference between age groups and the destination of visit. Copenhagen had a larger share of younger visitors, while Gothenburg had a larger share of older respondents.

AGE GROUPS

N=1,496



AGE GROUPS ACROSS CITIES




In Copenhagen, 75% of the respondents were younger than 45 years old, while 50% of the respondents in Gothenburg were older than 45 years old. These results differ somewhat from the 2012 survey of Chinese visitors, where the older respondents were more prevalent in Copenhagen. In 2012, the larger number of older respondents in Copenhagen was primarily explained by a considerably larger share of group travellers, which is a travel segment characterized by a higher average age. The new survey results demonstrate a decrease in Copenhagen's share of group travellers and an overall change towards more independent travellers which in general is characterized as a younger travel segment. This will be further elaborated in the report.

## WELL EDUCATED TRAVELLERS

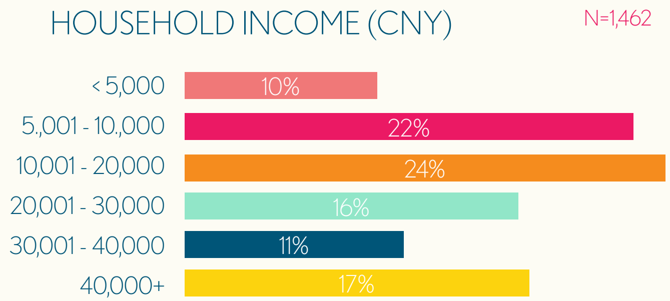
47% of the respondents held a college degree, and a university degree was also common among respondents.
Looking across age groups (disregarding respondents younger than 24 years old), the average level of education decreased with age. This pattern indicates that the younger age groups held higher education levels than the older age groups.
In this survey, fewer respondents held higher education levels than was the case in the past years' surveys. This points towards the fact that travelling to the Nordic destinations has become more accessible across all educational levels.

## INCOME HAS INCREASED

In the 2012 study, respondents indicated rather low-income levels, especially when taking into account the cost of travelling to the long-haul destinations of the Nordic regions.

In 2012, the respondents were asked about their personal income, but many respondents chose not to answer this question. In the 2016-survey, the respondents were asked to indicate monthly household income, rather than personal income.

HOUSEHOLD INCOME (CNY)




46% of the respondents reported a monthly household income between 5,001-20,000 CNY (€ 675-2,698) out of which 24% had between 10,001 – 20,000 CNY (€ 1,349-2,698) per month.

## TRAVELLERS FROM ALL OVER CHINA

Respondents from all over China took part in the survey. In general, respondents visited from a great variety of regions and cities of China. Beijing (21%) and Shanghai (18%) were the cities most represented as place of origin among respondents.

Especially Copenhagen had many respondents from Beijing and Shanghai. Stockholm had fewer respondents from Shanghai than Beijing, and Stockholm had almost all visitors from Hong Kong and Taiwan (though these two places of origin were not chosen by many respondents).

In the questionnaire, the respondents were asked to choose their city/region of residence from a list. If the respondent's city/region of residence was not on the list, it was possible to add it. 18% of the respondents used this option. Hunan, Xi'an and Henan were the most common places of residence which were added to the existing list.

## MOST RESPONDENTS FROM SOUTH OF CHINA IN STOCKHOLM

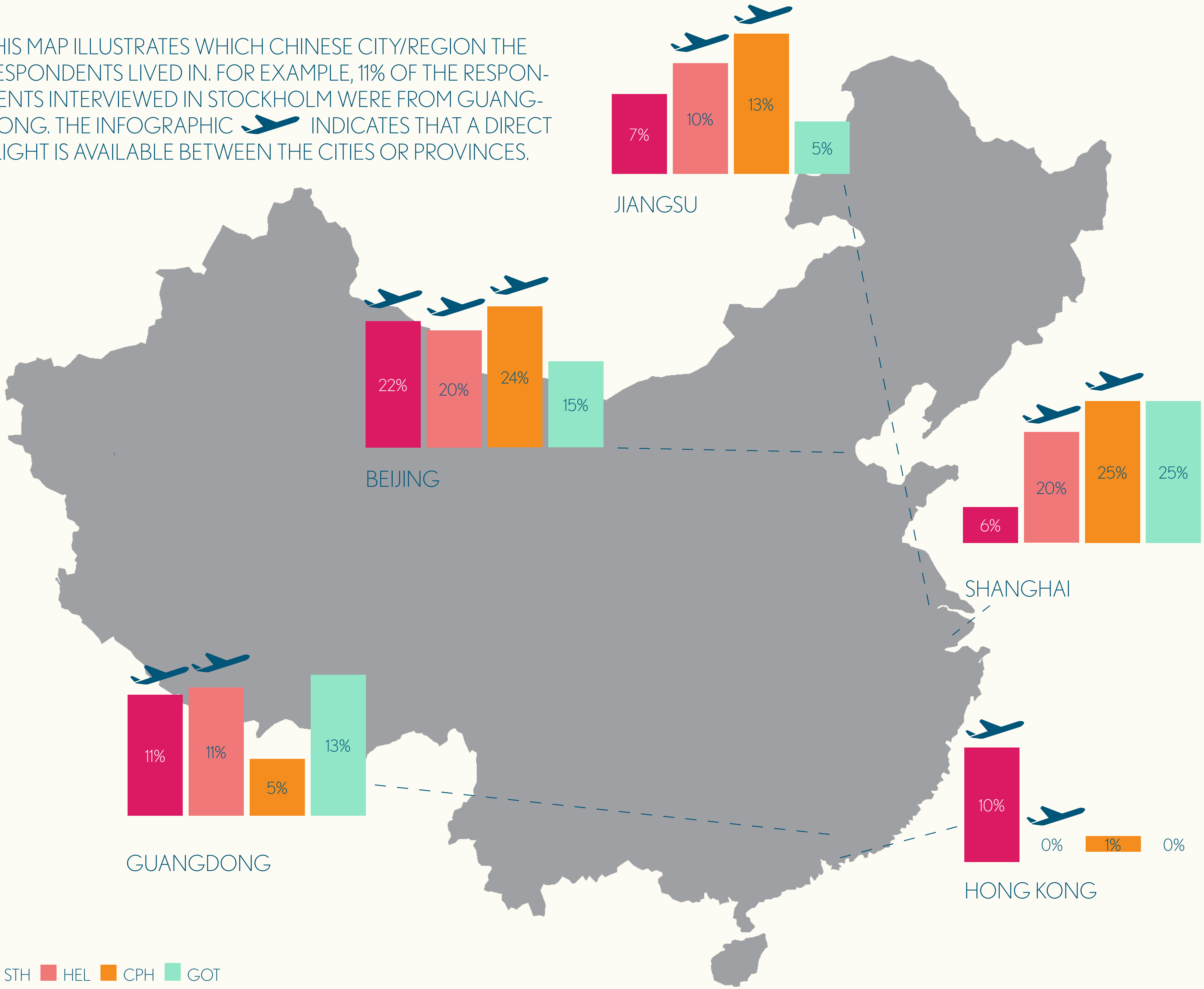
Stockholm had many visitors from the southern coastal areas in China. In total, 44% of the respondents interviewed in Stockholm were from the southern coastal areas in China. This is most likely explained by the daily flights between Stockholm and Hong Kong, as well as the availability of various transit options to Stockholm from other areas in the South of China.

## VISITORS FROM THE EAST COAST OF CHINA IN COPENHAGEN AND HELSINKI

Copenhagen and Helsinki had many respondents from the East coast of China who were visiting these cities as part of a holiday. The holiday-visitors from the East coast of China constituted 43% of the visitors in Copenhagen and 35% of the visitors in Helsinki. Both Helsinki and Copenhagen have daily departures to Shanghai, which is a possible explanation to this tendency.

The respondents from the East coast did not only travel to the Nordic destinations for holiday purposes. 45% of the respondents from the East coast of China travelled for business purposes. Of these 45% travelling for business purposes, more than half (57%) travelled to Helsinki.

THIS MAP ILLUSTRATES WHICH CHINESE CITY/REGION THE RESPONDENTS LIVED IN. FOR EXAMPLE, 11% OF THE RESPONDENTS INTERVIEWED IN STOCKHOLM WERE FROM GUANGDONG. THE INFOGRAPHIC ✈ INDICATES THAT A DIRECT FLIGHT IS AVAILABLE BETWEEN THE CITIES OR PROVINCES.



## A SHIFT TOWARDS MORE INDEPENDENT TRAVELLING

The Chinese outbound travel market has developed immensely in just a few years. In a recent study it was found that as many as 70% of outbound Chinese travellers are now independent travellers. Independent travellers refer to travellers who explore the world on their own instead of going on arranged tours.

This overall increase in independent travellers can also be identified when we look at the Nordic destinations. However, group travelling remain a popular form of travelling as well.

The survey questionnaire offered four different types of travel preferences: 1) Travelling in an organised group with less than 10 people 2) Travelling in an organised group with more than 10 people, 3) Semi-organised travelling and 4) Fully independent travelling.
When analysing the survey data, it became clear that regardless of group size, respondents that travelled in a group demonstrated similar behaviour. Equally, the respondents travelling in a semi-organised and independent manner demonstrated behaviour which to a high extent was alike. Therefore, the four options listed in the survey were reduced to two overall categories in the analysis, namely travelling by group (group travel) and travelling independently (FIT) . Free independent travellers, will in this report be mentioned as independent travellers, except in graphs, where the abbreviation FIT will be used.

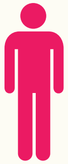
## FROM GROUP TRAVELLERS TO MORE INDEPENDENT TRAVELLERS

In the survey of Chinese travellers, conducted in 2012, the Chinese group travellers made up 59% of the entire respondent group. The number of group travellers decreased to 56% in the 2014-survey, and 68% of these group travellers indicated that they would travel in a more individual form, when/if visiting the Nordic destinations again.
In 2016 the number of group travellers decreased further, while the number of independent travellers increased to 54%.

DEVELOPMENT IN MODES OF TRAVEL

| | 2012 | 2014 | 2016 |
|---|---|---|---|
| GROUP | 59% | 56% | 46% |
| FIT | 41% | 44% | 54% |

46% GROUP TRAVELLERS



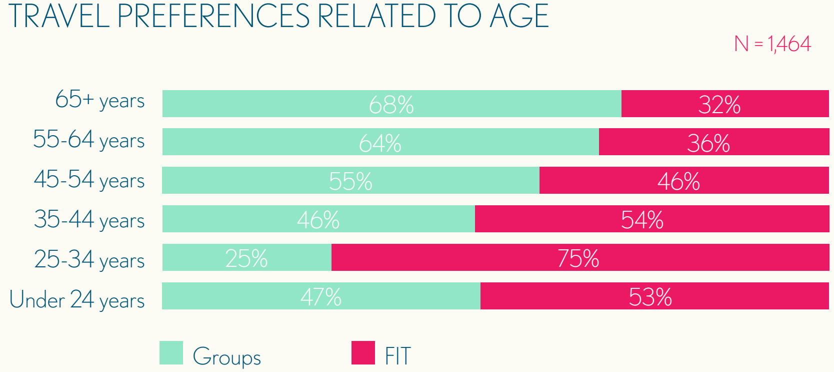
54% INDEPENDENT TRAVELLERS

## OLDER RESPONDENTS PREFERRED TRAVELLING BY GROUP

As mentioned earlier, the age of the respondents influenced their travel preferences. The older the respondents were, the more likely they were to be travelling in a group when visiting the Nordic destinations.

68% of the respondents in the oldest age group (65+ years) travelled as part of a group. Among the younger travelers, there were fewer group travellers, except for the youngest age group (younger than 24 years old), where 47% travelled by group. These young respondents primarily travelled with their parents or other family members, and therefore demonstrated behaviour of the older age groups with stronger preferences for group travel than independent travel.

TRAVEL PREFERENCES RELATED TO AGE

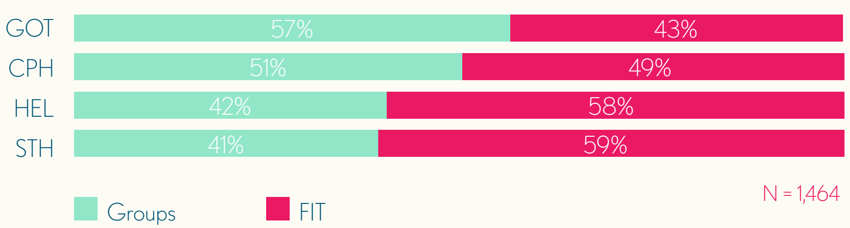



## MORE INDEPENDENT TRAVELLERS VISIT STOCKHOLM

59% of the respondents in Stockholm travelled individually, although the respondents in Stockholm were slightly older than the respondents from both Copenhagen and Helsinki.

Gothenburg welcomed the biggest number of group travellers, which matches the high prevalence of older respondents in the city.

CLOSE TO 50/50 SPLIT BETWEEN FIT AND GROUP TRAVEL



## 70% ON HOLIDAY IN THE NORDIC REGION

The proportion of holiday travellers has increased considerably from 54% in 2012 to 70% in 2016.

The two oldest age groups (55-64 years old and 65+ years old) were the most likely to be visiting friends/family in the Nordic countries (19%).

## 13% WERE ON BUSINESS TRIP

Business travellers made up a total of 13% of the respondents. In 2016, only 8% travelled for business in the summer, whereas this amount increased to 23% in the fall.
The respondents aged 25-44 years were the most likely to be on a business trip. 21% in this age range travelled for business purposes, which is more than twice as many as in the other age groups.

Business travellers were predominantly travelling independently. However, 8% said that they were travelling by group.

Less than 5% combined business travel with holiday.
Respondents that visited the Nordic countries for educational purposes made up 5%.

## THE MAJORITY ARE TRAVELLING WITH THEIR PARTNER

The most common travel combination across all age groups was with partner/spouse, which was the case for 43% of the respondents. The only exception was the youngest travellers, who were more likely to travel with other family members.

40% of the respondents who travelled with a partner, also travelled with their children. In total, 17% of all respondents travelled as a family.

Travelling with a child or a spouse demonstrated no influence on the choice of travelling by group or independently. However, when travelling with other family members, group travel was more prevalent.

43% TRAVELLED WITH PARTNER

## 1/3 TRAVEL WITH FRIENDS AND 12% TRAVELS ALONE

33% of all respondents travelled with friends. Travelling with friends was most popular among the two oldest age groups.

33% TRAVELS WITH FRIENDS

40% of the respondents aged 55-64 years travelled with friends and the same applies for 37% of the oldest respondents, aged 65 and above.
Respondents travelling with friends preferred the independent travel form.
12% of all respondents travelled alone to the Nordic region, and among these, 85% travelled independently.

## 7 OUT OF 10 STAYED AT A HOTEL

73% of all respondents stayed at a hotel during their trip to the Nordic destinations, while 1 in 10 stayed with friends/family.
93% of the respondents travelling by group stayed at a hotel during their visit, while only 57% of the independent travellers stayed in a hotel.
Purpose and time of journey demonstrated no influence on choice of accommodation, with hotel remaining the most popular option across all segments.

## YOUNGER TRAVELLERS ARE SEEKING OUT ALTERNATIVES TO HOTELS

Mostly younger respondents chose alternative types of accommodation.
12% of the respondents aged 25-34 years chose Airbnb for their stay, while 9% stayed with friends and family.
In Copenhagen, the majority (75%) stayed in a hotel. However, 16% of respondents aged 25-34 years and 18% of independent travellers chose Airbnb, making Copenhagen the Nordic destination with most Chinese visitors choosing Airbnb.

### ACCOMMODATION OF ALL RESPONDENTS

| | |
|---|---|
| 73% | STAYED AT A HOTEL |
| 9% | WITH FRIENDS/FAMILY |
| 6% | USED AIRBNB |
| 4% | STAYED AT A HOSTEL |

# TRAVELLING THE NORDIC REGION AND BEYOND

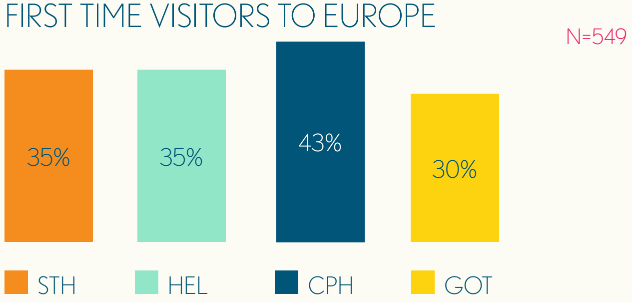
TRAVEL PREFERENCES OF THE CHINESE VISITORS CHANGE AS TRAVEL EXPERIENCE INCREASES. IN THIS SECTION, WE LOOK INTO THE TRAVEL EXPERIENCE OF CHINESE VISITORS IN THE NORDIC REGION, AND HOW THE PREFERENCES OF THE CHINESE VISITORS INFLUENCE THEIR WAY OF TRAVELLING, THEIR LENGTH OF STAY AND THEIR TRAVEL ITINERARIES. FINALLY, WE WILL TAKE A CLOSER LOOK AT THE COMBINATION OF DESTINATIONS THAT ALSO REACHES OUTSIDE THE IMMEDIATE NORDIC NEIGHBOUR DESTINATIONS.

## 37% VISIT EUROPE FOR THE FIRST TIME

Across all respondents, 37% had never been to Europe prior to this journey. This is a decrease in comparison to the survey conducted in 2012, where 45% of the visitors had never been to Europe before.
In Copenhagen, 43% visited Europe for the first time. The large number of first-time visitors should be seen in relation to the fact that respondents in general were younger in Copenhagen.

In Gothenburg and Stockholm, many visitors had been to Europe before. In Gothenburg, 70% of respondents were revisiting Europe. Stockholm had a high percentage of respondents who had visited Europe at least 5 times. 26% of the respondents in Stockholm had been to Europe at least 5 times.

### FIRST TIME VISITORS TO EUROPE

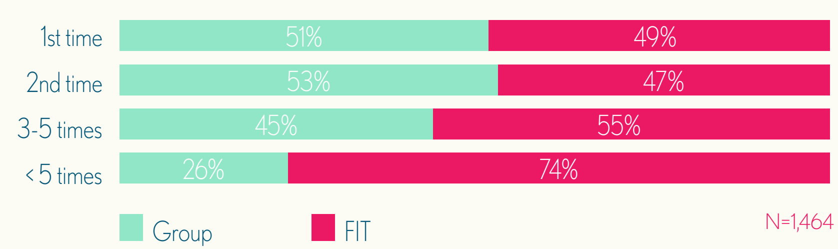



## GROUP TRAVELLERS ARE LESS FAMILIAR WITH EUROPE

As pointed out earlier in this report, respondents who had never been to Europe before, were more likely to travel in a group. Half (51%) of the respondents who visited Europe for the first time chose to travel by group. Independent travellers were almost three times more likely to have visited Europe 5 times or more, compared to group travellers.

19% of the respondents, who had been to Europe 5 times or more, were predominantly travelling independently (74%). Out of these respondents, who had visited Europe 5 times or more, 20% were business travellers. These numbers demonstrate a clear development from 2012, where only 7% had visited Europe more than 5 times before.

### TRAVEL EXPERIENCE TO EUROPE



## LENGTH OF JOURNEY CLOSE TO 10 DAYS

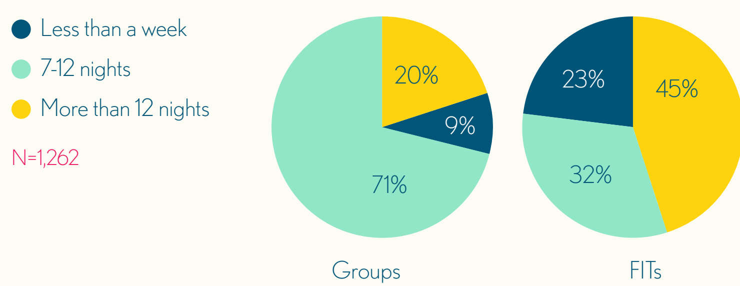
More than 84% of the respondents travelled for more than 7 days, and the overall average duration of a trip was 9.93 days.
In general, business travellers had shorter journeys than other respondents, but they also travelled for more than a week on average.

The respondents aged 25-34 years were on the shortest journeys with an average of 9.4 days, and the oldest respondents were on the longest journeys with an average of 10.8 days.

AVERAGE JOURNEY:
9.93 DAYS

The average length of the journey was approximately the same for group travellers and the independent travellers. However, the largest part of group travellers stayed 7-12 nights, while the largest part of independent travellers stayed more than 12 nights.

LENGTH OF OVERALL JOURNEY




Older respondents tended to travel for longer time periods and were more likely to travel in groups than to travel independently.

## 3.94 CITIES VISITED ON AVERAGE

89% of the respondents visited more than one city on their trip to the Nordic region. The largest number of respondents visited 4 cities (21%), but almost just as many visited a total of 5 cities. The average number of cities visited was 3.94.

84% of respondents who were on a group tour visited more than 4 cities in total. Groups overall visited an average of 4.7 cities, while the independent travellers on average visited 3.4 cities.
The respondents travelling during the summer holiday, visited slightly more cities (4.1 cities) than respondents travelling in the fall (3.5 cities).

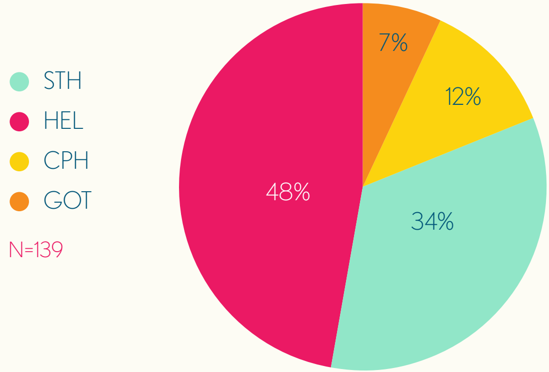
CITIES VISITED ON AVERAGE

| CITY | STH | HEL | CPH | GOT |
|---|---|---|---|---|
| AVERAGE | 3.75 | 3.82 | 4 | 4.65 |

## THE NORDIC CITIES ARE NOT STAND-ALONE HOLIDAY DESTINATIONS

In Copenhagen, almost 97% visited other cities in addition to Copenhagen. The high average of cities visited is in line with the fact that Copenhagen welcomes many group travellers, who typically include more destinations in one trip. Of the respondents who only visited one city, 48% visited Helsinki and 34% visited Stockholm. The fact that Helsinki had a high number of business travellers, has most likely influenced this inclination towards a mono-destination travel.

CITIES AS STAND-ALONE DESTINATIONS




## CAPITALS ARE THE MOST COMMON COMBINATION OF CITIES

The most common combination of cities visited, were Helsinki, Stockholm and Copenhagen, as reported by 53% of respondents. Among the group travellers, 76% had visited all 4 Nordic capitals, while only 24% of the independent travellers visited all 4 capitals.

When including the capital of Norway, Oslo, almost half of the respondents (46%) had visited the four capitals in combination.

## STOCKHOLM IS THE MOST VISITED CITY

Stockholm was the most visited city in the survey. Almost 8 out of 10 (77%) visited the Swedish capital. Of these travellers visiting Stockholm, 80% also visited Copenhagen and 77% visited Helsinki.

73% of all the respondents visited Copenhagen. 17% of the respondents who have visited Copenhagen, also visited Malmö and 85% of the visitors in Copenhagen, also visited Stockholm. 8% of all respondents visited Odense, and of these, almost all (97%) visited Copenhagen as well.

## SAINT PETERSBURG AND REYKJAVIK ARE POPULAR DESTINATIONS

As many as 21% of the respondents visiting Gothenburg also visited Saint Petersburg. In Helsinki, Stockholm and Copenhagen 15-16% combined their visit to the Nordic cities with a visit to Saint Petersburg, pinpointing the Russian city as a popular combination with the Nordic cities. Another popular combination with the Nordic cities was a visit to Iceland. 5% of all respondents visited Iceland, and almost half of these were respondents interviewed in Copenhagen. 56% of respondents that travelled to Iceland were aged between 25-44 years.

5% INCLUDED ICELAND IN THEIR TRAVEL ITINERARY

21% VISITED SAINT PETERSBURG

## NUMEROUS EUROPEAN DESTINATIONS IN THE ITINERARIES

23% of the respondents combined their visit to the Nordic region with other European destinations.

23% COMBINED THE NORDIC COUNTRIES WITH OTHER EUROPEAN DESTINATIONS

73% of the respondents who were visiting Europe for the second time or more combined Nordic destinations with other European destinations. Respondents with a journey of 10 days or more were also more prone to combine many cities, including destinations outside the Nordic region.

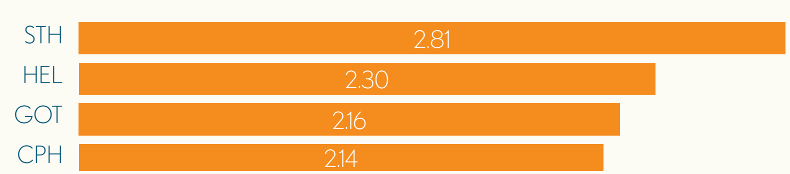
73% OF THOSE VISITING BOTH THE NORDIC COUNTRIES AND EUROPE WERE VERY EXPERIENCED TRAVELLERS

## INDEPENDENT TRAVELLERS SPENT MORE TIME IN EACH CITY

On average, respondents stayed 2.38 days in the city of interview. The longest stays were in Stockholm (2.81 days on average) and the shortest in Copenhagen (2.14 days on average). In Stockholm, 45% stayed for 3 days or longer.

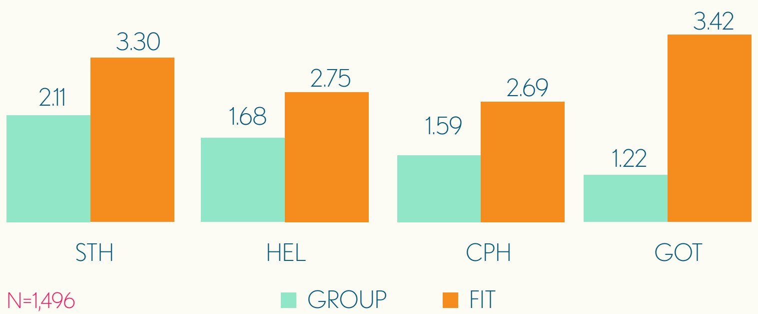
The fact that the Chinese travellers had the shortest stays in Copenhagen should be seen in relation to the high number of group travellers in Copenhagen. As mentioned before, the group travellers in general visited more cities while travelling and stayed for a shorter period of time in each city.

AVERAGE LENGTH OF STAY IN CITY (DAYS) N=1496



Independent travellers, on the other hand, spent almost 3 days (2.95 days) per city. Since the overall length of journey was almost the same for independent travellers and the group travellers, it becomes clear that independent travellers had longer stays in fewer cities while group travellers visited more cities and spent less time in each city.

FITS STAY LONGER IN EACH CITY




## MORE PACKED ITINERARY FOR OLDER RESPONDENTS

The respondents in the three older age groups had shorter stays in each city and visited more cities on their journeys, but they also had the longest overall journeys.

The age group from 25-34 years old took shorter vacations (9.4 days) compared to the three older age groups. This younger segment also visited fewer cities (3.49) compared to the older age groups.

AVERAGE LENGTH OF STAY IN CITY FOR AGE GROUPS

| AGE GROUP | LENGHT OF JOURNEY | LENGTH OG STAY | NUMBER OF CITIES |
|---|---|---|---|
| UNDER 24 YEARS | 9.91 | 2.33 | 3.66 |
| 25-34 YEARS | 9.42 | 2.72 | 3.49 |
| 35-44 YEARS | 9.91 | 2.48 | 3.94 |
| 45-54 YEARS | 9.98 | 2,1 | 4.37 |
| 55-64 YEARS | 10.67 | 2.23 | 4.52 |
| 65+ YEARS | 10.82 | 2.25 | 4.27 |

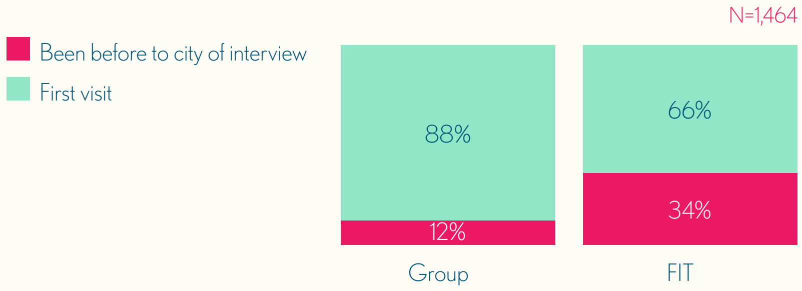
## PRIMARILY FIRST TIMERS TO THE NORDIC CITIES

Few respondents had been to the city, where they were interviewed, before. Respondents in Copenhagen and Gothenburg were primarily first-time visitors to the city.

Compared to group travellers, independent travellers were 3 times as likely to have visited the city of interview before.

In the 2014 survey of Chinese visitors to Copenhagen, 68% of group travellers wished to return, but indicated that they would prefer to return as more independent travellers next time they visited the city of interview. This is line with results from this survey indicating that independent travellers have more previous travel experience from the city of interview than group travellers.

# INDEPENDENT TRAVELLERS ARE REPEAT VISITORS

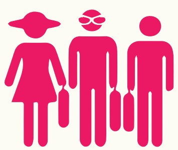


# PLANNING THE JOURNEY

IN THIS CHAPTER, WE LOOK INTO THE PREFERENCES OF THE CHINESE TRAVELLERS, WHEN IT COMES TO PLANNING AND BOOKING A TRIP. WE EXPLORE WHAT KIND OF INFORMATION IS SEARCHED FOR AND THROUGH WHICH CHANNELS. FINALLY, WE IDENTIFY THE MOST DECISIVE FACTORS FOR CHOOSING A DESTINATION OR BOOKING A HOTEL.

## CHINESE TRAVELLERS PLAN CLOSE TO DEPARTURE

42% of the respondents planned their trip to the Nordic countries only 2 months ahead of departure. Another 32% of all respondents planned their trip 3 months ahead. Among the respondents travelling for holiday purposes, 76% planned their journey 3 months before departure. Only 19% began planning their trip 4-6 months before departure.



76% OF RESPONDENTS TRAVELLING FOR HOLIDAYS PLANNED THEIR JOURNEY 3 MONTHS BEFORE DEPARTURE

83% of business travellers planned 3 months ahead.
Respondents visiting friends/family planned in slightly better time, with 41% making their bookings at least 4 months in advance.

83% BUSINESS TRAVELLERS PLANNED THEIR JOURNEY 3 MONTHS BEFORE DEPARTURE

Whether respondents were travelling in the fall or in the summer made no difference to how long in advance the trip was booked, despite more business travellers were visiting in the fall. Perhaps due to worry of high-season prices or availability, the business travellers booked slightly earlier when travelling during the summer, as compared to the fall.

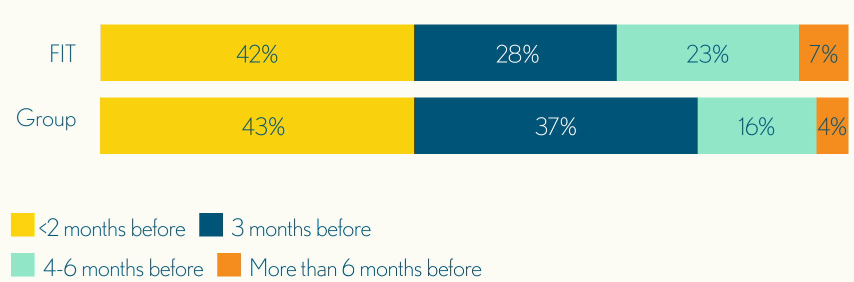
## FREE INDEPENDENT TRAVELLERS BOOK SLIGHTLY EARLIER

A tendency to plan close to departure can be identified in all age groups. However, the independent travellers planned their journey earlier than group travellers.

On average, respondents travelling independently planned their trip 3 months in advance, whereas the group travellers planned their trip 2.5 months before departure.

GROUP VS. FIT - TIME OF PLANNING JOURNEY

N = 1,464



## KEY PARAMETERS WHEN PLANNING A TRIP

The Chinese visitors were asked to evaluate the importance of a range of parameters in their planning process. More specifically, the aim was to gain knowledge about what the Chinese travellers found important when deciding on a destination or when booking a hotel.

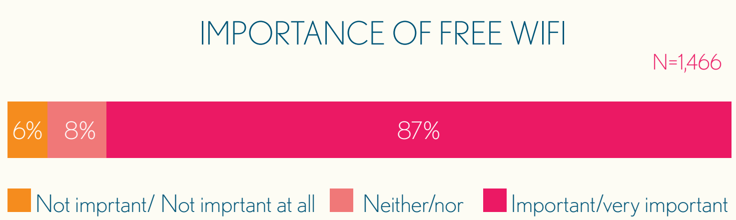
The respondents were asked to rate different parameters on a scale from 1 to 5, where 1 was "not important at all" and 5 was "very important". These parameters were explored by asking a range of questions within 4 overall topics:

- Accommodation
- Attractions
- Information
- Planning

In the following, the main results are presented.

## FREE WI-FI AND HOTEL AMENITIES ARE IMPORTANT

All respondents answered that free Wi-Fi was the most important factor when choosing accommodation (average mean 4.49, on a scale from 1-5). WiFi became less important with age, but the majority (59%) of the oldest respondents (65+ years) also found Wi-Fi to be very important.




The majority of respondents, regardless of their way of travelling, also found it very important that the hotel/hostel had amenities like kettle, slippers, bathrobe etc. (Only hostel and hotel respondents were included in this part of the data analysis). 80% found it either "important" or "very important" for the hotel to offer amenities.

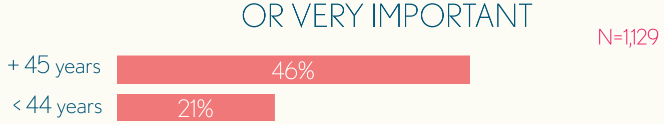
## CHINESE SPEAKING STAFF AT HOTEL

Among the respondents above the age of 55 years, 1 in 2 found Chi-nese- speaking hotel staff "very important", while only 1 in 10 of the youngest respondents rated it as "important" to have Chinese-speaking hotel staff (only results from respondents that stayed at a hotel or hostel were included).

Respondents aged 45 years and above were more likely to find it "very important" to have Chinese-speaking hotel staff.

Finally, the independent travellers found it less important to have Chinese-speaking staff than respondents travelling in groups did.

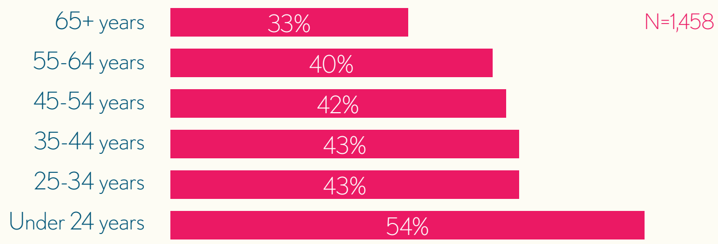
CHINESE SPEAKING STAFF - VERY IMPORTANT OR VERY IMPORTANT




## ACCOMMODATION SHOULD REFLECT LOCAL ATMOSPHERE

Local atmosphere is generally rated as having high importance among the Chinese travellers. The survey also highlights that the feeling of a local atmosphere is important when choosing accommodation.
The graph illustrates, that the importance of a local atmosphere differed across age groups. However, most respondents found it either "important" or "very important" that their accommodation had a sense of local atmosphere.

LOCAL ATMOSPHERE - IMPORTANT OR VERY IMPORTANT




## AGE INFLUENCES PREFERENCES

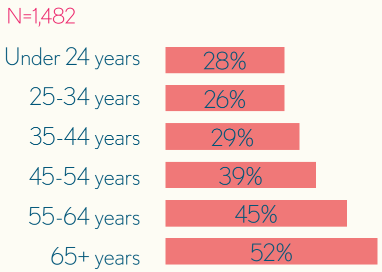
In general, the younger respondents rated less parameters as having importance compared to the older age groups.
This indicates that the youngest respondents, where the majority were travelling independently, appeared less concerned and had seemingly fewer demands, when planning their trip compared to the older respon-dents often travelling in a group.

## OLDER RESPONDENTS WANT MUST-SEES AND MANY SIGTHS

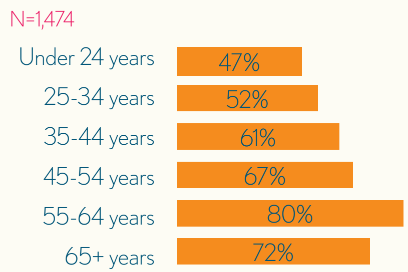
Age was once again an influential factor when planning activities during the journey. Visiting famous must-see attractions was important to all re-spondents. Yet the number of respondents who found it very important to visit must-see attractions varied from 47% in the youngest age group to 81% in the age group 55-64 years.

The respondents travelling in groups found it much more important than the independent travellers to visit must-sees.

## VERY IMPORTANT TO SEE AS MANY SIGHTS AS POSSIBLE




## VERY IMPORTANT TO VISIT MUST-SEES

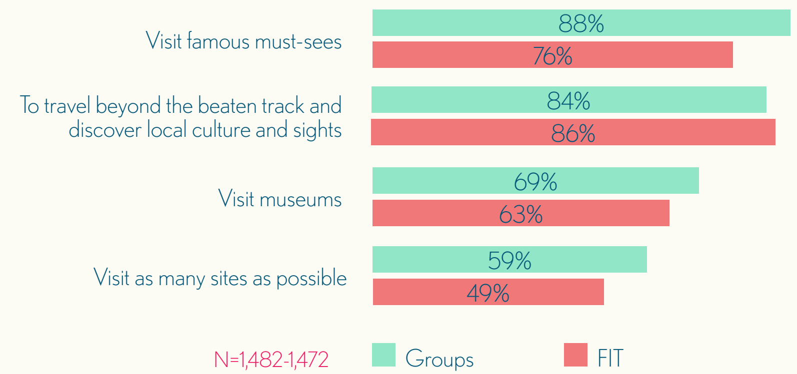



The graphs above point to a possible shift in importance of expectations amongst the younger respondents. The graph to the left illustrates that older respondents prioritized to see as many sights as possible while this was not as important for the younger age groups, and the graph to the left demonstrates that the older respondents found the must-sees more important than the younger respondents.

## TRAVELLING TO BROADEN CULTURAL HORIZON

Overall, visiting museums was less important than visiting must-see attractions. However, 65% of respondents still found it important or very important to visit museums.
Slightly fewer independent travellers than group travellers found it important to visit museums. In general, group travellers found most activities at the destination more important than the independent travellers.
Travelling beyond the beaten track and discovering local culture was considered important across all respondents.

## IMPORTANT OR VERY IMPORTANT - ATTRACTIONS




## INTEREST IN MUST-SEES AND BEYOND THE BEATEN TRACK

Looking across the four cities, respondents in all cities found it equally important to travel beyond the beaten track and to visit famous must-sees. The importance of visiting museums and to visit as many sights as possible was regarded differently in the cities, as respondents in Helsinki and Stockholm found it more important to visit museums and see as much as possible than respondents in Copenhagen and Gothenburg.

## INFORMATION IN CHINESE IS IMPORTANT

In earlier surveys, the Chinese visitors have rated the availability of Chinese information as very poor in the Nordic destinations.
In this survey, 30% of the respondents rated the availability of information in Chinese as an important factor when planning their journey (throughout the report, whenever information is mentioned, this refers to information in Chinese language).

Information, whether online or printed, was by far more important to the older respondents and this importance declined with age.

63% OF THE OLDEST RESPONDENTS RATED CHINESE INFORMATION (ONLINE OR PRINTED) VERY IMPORTANT.

The youngest respondents rated the availability of Chinese information to be of low importance. This could partly be caused by the fact that respondents in the youngest age group were often travelling with parents or other family members and thereby leaving the planning of the trip to someone else.

Respondents travelling by group found Chinese-language information much more important than independent travellers, despite travelling in a more organised setup.

## OLDER RESPONDENTS PREFER PRINTED INFORMATION

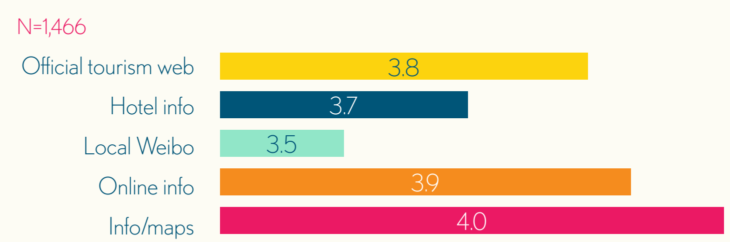
The most important type of information was printed tourist information and/or city maps in Chinese, according to the respondents. On average, 48% across all age groups rated printed tourist information and/or city maps in Chinese as "very important". However, the oldest age group found the printed tourist information more important than the youngest age group. 77% in the oldest age group rated the printed tourist information as important while only 29% among the youngest age group rated this kind of information as important.

77% OF THE OLDEST RESPONDENTS FOUND PRINTED CHINESE INFORMATION VERY IMPORTANT.

## WEIBO IS NOT SEEN AS IMPORTANT WHEN PLANNING

The social media network Weibo has 390 million monthly users, which is almost 30% of all Chinese internet users (http://marketingtochina.com/weibo-part-chinese-social-media-history).

IMPORTANCE OF INFORMATION ON A SCALE FROM 1-5




However, Weibo was not rated as having great importance in the planning process.  On a scale from 1-5, where 1 was "not important at all" and

5 was "very important", Weibo was rated at an average 3.5.
Only 17% of the youngest respondents found Weibo important in the planning process. This could be due to their minor part in planning the journey, as they often were travelling with family members, who probably did most of the planning.

The main purpose of most destinations' Weibo channel is to attract visitors by sharing information about the destination. The fact that Weibo is not perceived as important in the planning phase can also be caused by different meanings of the wording "planning process". Respondents might understand a planning process as a process with practical tasks such as booking a hotel or transport from the airport and not think of general research about a destination as part of the planning process.
Since this section focuses on the planning process, the use of social media while travelling will be explored in a following section.

## A DESTINATION NEEDS TO PROVIDE VALUE FOR MONEY

When choosing a destination, value for money was rated as the most important parameter in the planning process across all age groups. 78% of all respondents found it important or very important to consider value for money, when planning their journey.

## FAMOUS PEOPLE HAVE LITTLE INFLUENCE

Across the four cities, the results were rather similar regarding sources of inspiration. The survey demonstrated that the Chinese travellers considered the otherwise popular Chinese practice of celebrity endorsement of very low or no importance when choosing their destination. Only 17% stated that endorsement by a famous person was very important.

## FRIENDS AND FAMILY WAS THE MOST IMPORTANT SOURCE

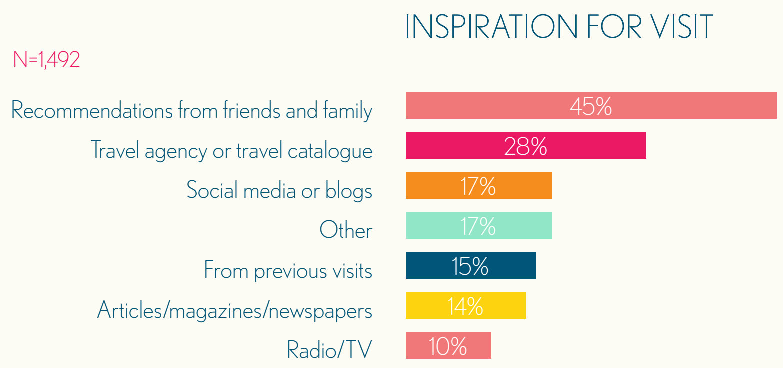
Recommendations by friends, on the other hand, were rated very important. More than 70% would take the experience and recommendations by their friends into consideration, when planning their journey.
45% of all respondents said to have been inspired by friends and/or family for the trip to the Nordic region.

## IMPORTANT OR VERY IMPORTANT ASPECTS WHEN CHOOSING A DESTINATION

Among the first-time travellers to Europe, friends were by far the most common source of inspiration. Across the four cities, the results were rather similar regarding sources of inspiration.

## INSPIRATION FROM A TRAVEL AGENCY AND PREVIOUS VISITS

Influence from a travel agency was, not surprisingly, more prevalent among group travellers (87%).
More than 91% of the respondents who had been to Europe before said previous visits to the destination had inspired them for another visit.



# WHILE TRAVELLING

WHEN THE CHINESE TRAVELLERS REACH THEIR NORDIC DESTINATION, THEY HAVE A BUSY SCHEDULE. THEY PRIORITIZE TO SEE MANY KEY ATTRACTIONS, YET ALSO TO SEEK OUT PARTS OF THE DESTINATION THAT ARE OFF-THE-BEATEN TRACK.
IN THIS SECTION, WE WILL FURTHER EXPLORE HOW THE CHINESE TRAVELLERS PREFER TO EXPERIENCE THE NORDIC DESTINATIONS AND WHAT THEIR ITINERARIES PRIMARILY CONSIST OF.

## SIGHTSEEING WAS THE PRIMARY ACTIVITY

Almost every respondent in the survey (including the business travellers) visited tourist sites and attractions. 90% of the respondents went sightseeing during their trip around the Nordic destinations. In the oldest age group, up to 97% went sightseeing.

90% WENT SIGHTSEEING

## LOCAL FOOD IS PART OF THE EXPERIENCE

Food was also a key part of the travel itinerary for many respondents. 73% of the respondents tried local food, while visiting the Nordic countries, and the youngest respondents in particular tried different kinds of food. Slightly fewer group travellers (66%) than independent travellers (79%) tried the Nordic cuisine. Finally, 75% of the travellers aged 55 years and above were more inclined to eat Chinese food while travelling in the Nordic region.

73% HAD LOCAL FOOD

75% OF THE RESPONDENTS AGED 55 YEARS AND ABOVE HAD CHINESE FOOD

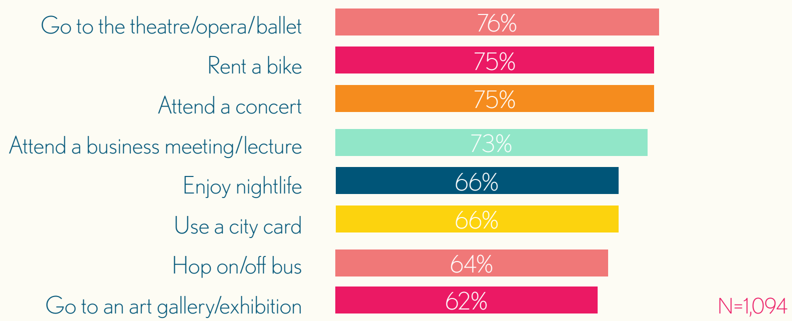
## CULTURAL ACTIVITIES ARE SOUGHT AFTER

Visiting museums was also a very popular activity. Slightly less popular among the youngest respondents (66%) than among the older respondents (83%), but still the clear majority of the young respondents found the time to visit at least one museum.

In addition, many respondents indicated that they would have liked to visit the theatre, opera or ballet, if they had been more aware of these options.

72% OFF ALL RESPONDENTS VISITED MUSEUMS

## ACTIVITIES VISITORS DIDN'T DO, BUT WOULD HAVE LIKED TO




## SHOPPING FOR LOCAL DESIGN

Overall, 67% said that they had been shopping for souvenirs while visiting the Nordic countries, and 57% stated that they had been shopping for local design.
Older respondents were very frequent shoppers. 69% of the 55-64 year olds shopped for souvenirs.

67% HAD BEEN SHOPPING FOR SOUVENIRS WHILE IN THE NORDIC COUNTRIES

Stockholm had the most visitors shopping for souvenirs (71%), while 60% in Stockholm shopped for local design.

25% had made shopping plans before the trip. This was especially the case when shopping for amber, shoes and bags. Chocolate, Lego and health products were also popular shopping items.

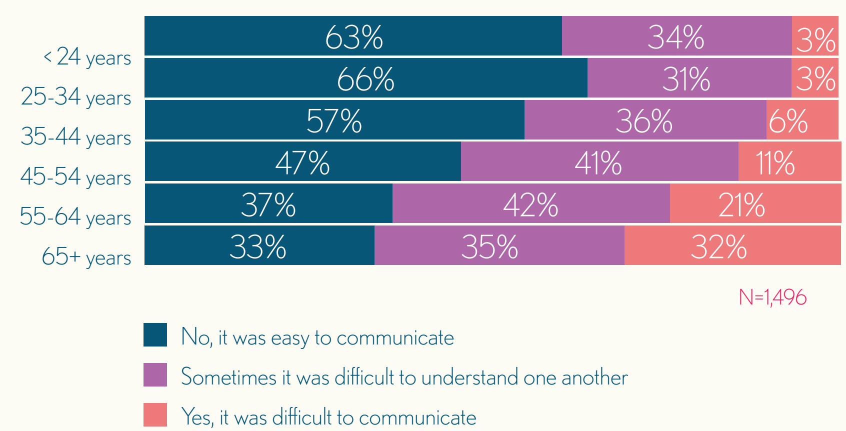
## YOUNG TRAVELLERS ARE MORE ADVENTUROUS

The young respondents aged 25-34 years were more likely to have visited a gallery (34%), gone to the theatre/opera (21%), a concert (24%) or been on a hop on/hop off bus tour (32%) compared to the older respondents.

## AGE IS THE MAIN FACTOR IN COMMUNICATION CHALLENGES

56% of the respondents found it easy to communicate with the locals. Communication became more difficult with age, as the older respondents found it more difficult to communicate with locals.
2 out of 3 respondents of 44 years and below found no problem communicating with locals. There was no difference between the destinations concerning communication.

## COMMUNICATION WITH LOCALS ACROSS AGE GROUPS



# ONLINE ACTIVITIES WHILE TRAVELLING

IT IS HIGHLY PREVALENT AMONG CHINESE TRAVELLERS TO USE ONLINE AND SOCIAL PLATFORMS FOR INFORMATION AND INSPIRATION WHILE TRAVELLING. IN THIS SECTION, WE EXPLORE WHAT THE CHINESE TRAVELLERS SEARCH FOR ONLINE AND THROUGH WHICH CHANNELS AND PLATFORMS, WHILE TRAVELLING IN THE NORDIC REGION.

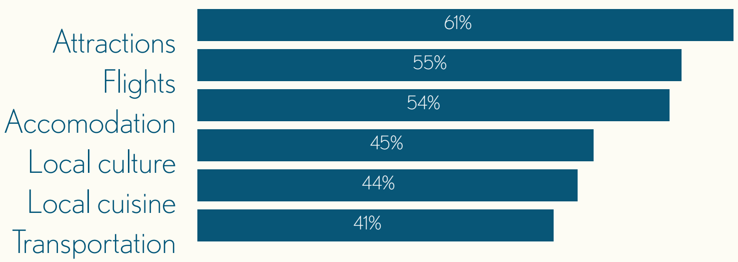
## 94% SEARCHED ONLINE PRIOR TO JOURNEY

Use of the internet in searching for information has developed immensely since the initial survey of Chinese travellers in 2012. In 2012, 46% of respondents searched information online. This was mainly when looking for information about flights and accommodation.

In the 2016-survey, the number of respondents doing online research in relation to their trip has increased to 94%. The topics most researched online are listed in the table.

N=1,496

TOPICS MOST RESEARCHED ONLINE

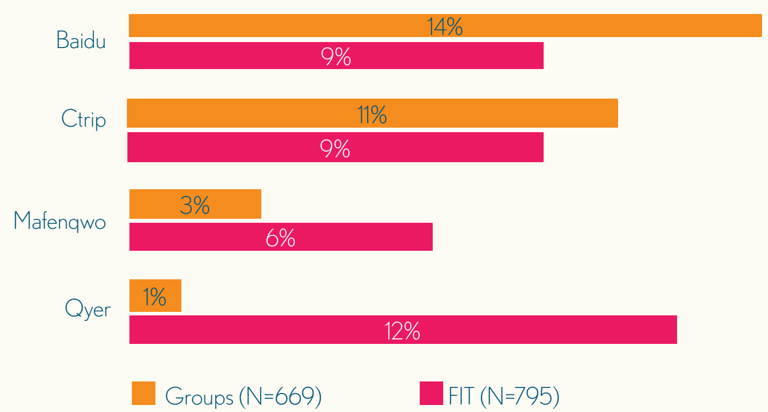



## BAIDU - POPULAR FOR TRAVEL INSPIRATION

Baidu was the search engine most frequently used, while searching for inspiration. In total, 16% of the respondents had used the search engine to search for travel information. Ctrip, Chinas largest online travel agency, was also very popular with 14% having used the site when searching for information.

Qyer was especially popular among the independent travellers. Qyer is a travel information website with user-generated content. The similar platform, Mafenqwo, was also very popular among the independent travellers.

WEBSITES USED FOR SEARCHING TRAVEL INFO




## INCREASE IN USE OF SOCIAL MEDIA

As seen in the two previous studies (2012 and 2014), the Chinese visitors were highly active on social media during their journey. This study found that as many as 85% of the respondents had posted online, or

were planning to post during their journey.
In 2012, 67% of the surveyed Chinese visitors used or were planning to use their social media account while travelling. This amount increased to 72% in 2014 and in 2016, the number of visitors who used or were planning to use their social media account while travelling has further increased to 85%.

The older respondents used social media less, but the majority of re-spondents had used social media on their journey. 91% of the users between the age of 25 and 34 years had used social media on their jour-ney, while that number decreased to 78% for those above 55 years old.

## WECHAT IS THE MOST POPULAR SOCIAL MEDIA CHANNEL

The preferred media used by travellers to share information while travel-ling, was WeChat with 70% of the respondents using this media. WeChat was also the most popular media in 2014, followed by Weibo.

Across age groups, those under the age of 35 years used social media the most. 50% of the postings on social media were made by those under 35, even though they only represented 42% of all respondents.

39% of the respondents posted information on more than one social media platform.

70% USED WECHAT

On average, every independent traveller used 1.3 types of social media platforms, whereas group travellers used 1.1. This difference was mostly due to a few independent travellers using between 4-6 different platforms.

15% of the respondents did either not have a social media account or were not planning to post anything about their trip.

Independent travellers, and especially those under 45 years old, were more likely to use Instagram and Facebook. Close to 90% of the users of Instagram and Facebook were under the age of 45 years, and of these, 1 in 8 was travelling independently. Interestingly, both Instagram and Face-book are inaccessible in China.

AS MANY AS 72% OF THE USERS OF INSTAGRAM AND FACEBOOK WERE FITS AND UNDER 45.

A large share (82%) of the Weibo users also used Wechat. However, Weibo was only used by 20% of respondents (as opposed to 70% using WeChat), and Weibo users were mainly group travellers (71%). There is no doubt that WeChat has overtaken the vast majority of the Chinese market, but the two platforms remain somewhat different in their use and potential for marketing.

## A TALE OF TWO GIANTS WEIBO AND WECHAT

Weibo and WeChat are major social media platforms in China, with respectively 340 million and 938 million monthly active users (2017 Q1). The communication methods and functionality of Weibo and WeChat are quite different.

Weibo has an open social-media platform environment much like Twitter, where most of the content and the interactions between users are public and accessible. On Weibo, users follow certain accounts, and with functionalities associated with Twitter, Instagram and Facebook, content on Weibo is quickly and easily shared, and has the potential to spread exponentially. Users are therefore also exposed to (and hopefully inspired by) content by accounts they do not follow.

The open environment enables accounts of destination marketing organisations (DMOs) to pick up and work with user-generated content, for example content from visitors travelling in the Nordic region. The environment also enables account holders to interact with influencers and other DMO-accounts, and to create content that is related to trending topics (news, holidays etc.). In short, Weibo is suited for mass broadcasting.

WeChat, which started as an instant messaging app, has expanded into a "digital Swiss knife". Its functionalities now include news aggregation, payment services, personal finance service, taxi-hailing, city bike renting, and a hub for third party "mini-apps" like online shopping, ticketing and booking services. The versatile functionality has largely contributed to its popularity.

On WeChat, besides communicating with private contacts, users can follow public accounts. The content of these accounts can then be shared into the user's private messages or Friend Circle (Moment). With its closed and private communication environment, user's social interactions are only visible for friends and acquaintances, WeChat provides for exclusive communication with users who are interested in specific content.

# SATISFACTION WITH THE NORDIC DESTINATIONS

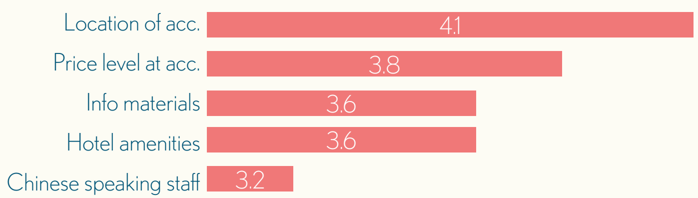
IN THIS SECTION, WE LOOK AT THE CHINESE TRAVELLER'S SATISFACTION WITH THE NORDIC DESTINATIONS. WE EXPLORE LEVELS OF SATISFACTION WITHIN DIFFERENT ASPECTS OF THE TRAVEL EXPERIENCE, INCLUDING ACCOMMODATION, SERVICE AND INFORMATION. WITH AN AVERAGE OF 41% WISHING TO MAKE A RETURN VISIT, WE WILL LOOK AT WHICH ASPECTS OF THE TRIP MAINLY INSPIRED THEIR ASPIRATION TO RETURN.

To evaluate the Chinese traveller's overall satisfaction with their stay, we asked Chinese travellers to rate a list of tourism products and service on a scale from 1-5, where 1 was very dissatisfied and 5 was very satisfied.

## LOCATION OF ACCOMMODATION WAS VERY SATISFACTORY

Regarding accommodation, location of accommodation was rated with the highest average satisfaction score (4.10). Especially respondents in Helsinki were very pleased with 80% either satisfied or very satisfied with the location of their accommodation.

SATISFACTION WITH ACCOMMODATION




When choosing a hotel in the planning phase, hotel amenities were deemed very important. As illustrated earlier in the report, the importance of hotel amenities was rated with an average score above 4, where 1 was "not important at all" and 5 was "very important".
When the surveyed visitors were asked to rate their satisfaction with their hotel amenities, they rated 3.7 on average at scale where 1 was very dissatisfied and 5 was very satisfied. These ratings indicate that the expectations in relation to amenities were close to, but not fully, met.

## PRICE OF ACCOMMODATION IS NOT A BIG ISSUE

Though accommodation of the Nordic countries is usually considered expensive, price level at accommodation was rated satisfactory with an average score of 3.8. The high satisfaction with location may have positively influenced satisfaction with price.

However, the price level in general – not just for accommodation – was pointed out by the Chinese travellers as a negative experience, while travelling in the Nordic region.

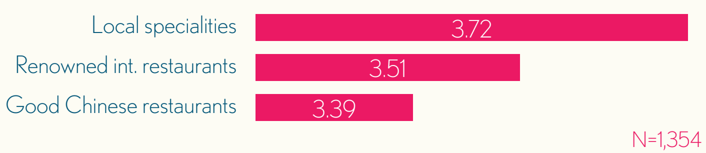
## LESS SATISFACTION WITH CHINESE-SPEAKING STAFF

The least satisfactory with regards to accommodation was (the lack of) Chinese-speaking staff. 60% of the respondents gave a score of 3 or less on this topic.
There was no difference between whether respondents were travelling as a group or as an independent traveller, but season influenced this satisfaction score. The respondents who visited during the fall season were less satisfied with the Chinese-speaking staff perhaps in part explained by the fact that Chinese-speaking staff is also seasonal, so during fall less hotels have Chinese-speaking staff available.

## VERY SATISFIED WITH THE LOCAL SPECIALITIES

As part of the food experience, local specialities received the highest satisfaction score. Earlier surveys and studies have shown a preference for Chinese food among Chinese travellers, but this has changed in the 2016-survey, where respondents had also tried the local food and were very satisfied with the experience.
Especially, the respondents travelling in the fall season, or travelling independently, were very satisfied with the local specialities.

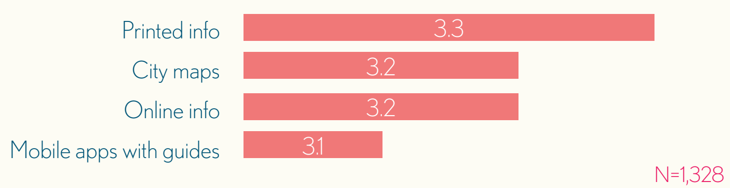
### SATISFACTION WITH LOCAL FOOD




## INFORMATION LEAVES ROOM FOR IMPROVEMENT

Overall, the Chinese travellers were least satisfied with the level of information.
This reflects the results of the 2012-survey, where availability of Chinese information (provided in print, online, or through Chinese- speaking staff) was also the least satisfactory.
In this year's survey, Chinese language mobile apps with city guides scored an average of 3.1 with 63% giving them a score of 3 or lower.

### SATISFACTION WITH CHINESE INFORMATION AVAILABLE



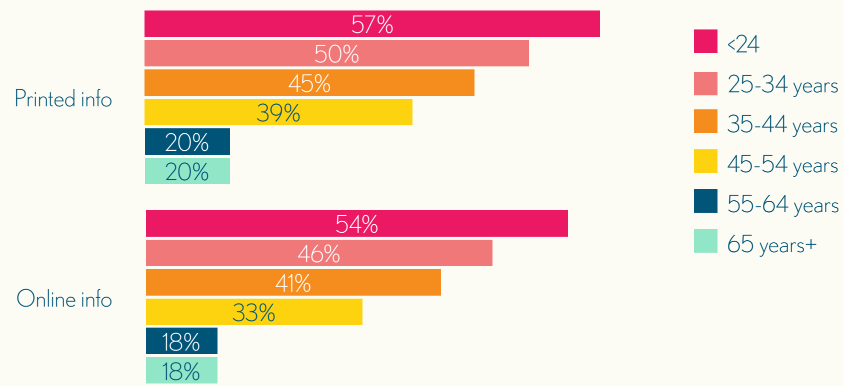

## PRINTED INFO WAS BEST RATED

Printed information as well as online information were both appreciated sources of information. The satisfaction rates show that the printed information in general was rated slightly better than the online information.
Earlier in the report, it was illustrated that the older respondents attached greater importance to printed materials than the younger respondents.

The graph illustrating satisfaction with information, shows that the younger respondents in general were slightly more satisfied with the printed materials. With regards to online information, the pattern is the same: the older respondents were less satisfied than the younger, and the respondents travelling independently were more satisfied than the groups.

### SATISFACTION WITH CHINESE INFORMATION

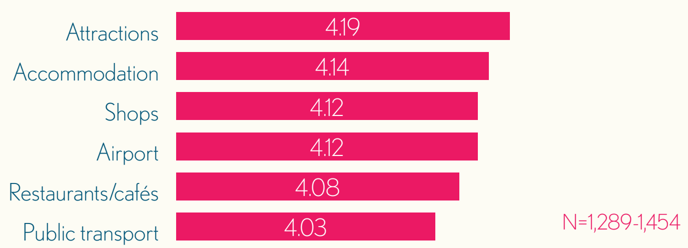
N=1,119-1,150




## SERVICE SATISFACTION HAS INCREASED

A key finding and recommendation of the 2012-survey was the need to improve service provided to Chinese travellers. This has since been one of the corner stones of the ongoing Chinavia project by providing service crash courses and toolkits. The results from the 2016-survey demonstrate an increase in satisfaction with levels of service. All six of the parameters related to satisfaction with service experience scored an average above 4 (on a scale from 1-5), reflecting an overall "very positive" experience among the respondents. Especially attractions were very satisfactory in terms of service with 43% being "very satisfied" and only 0.5% being "not satisfied at all". Restaurants and cafes, along with public transport, received the lowest satisfaction scores, yet still with an average above 4 for both domains. 61% gave a score of 4 or 5 on public transport and 74% were satisfied or very satisfied with restaurants and cafes.

SATISFACTION WITH SERVICE LEVELS




## YOUNGER RESPONDENTS ARE MORE SATISFIED

The biggest difference in levels of satisfaction was between age groups and/or differences between group- and independent travellers. The older respondents were less satisfied than younger respondents, and independent travellers more satisfied than groups travellers.
Respondents who have rated satisfaction as "1" or "2" were asked an open follow-up question. Some of these answers included responses like "okay", "basically satisfied", "generally satisfied", demonstrating a more positive experience than the score of 1 or 2 would indicate. Very few respondents included concrete examples when they elaborated their negative ratings, e.g. discrimination by staff or difficulties using public transport due to language barriers.

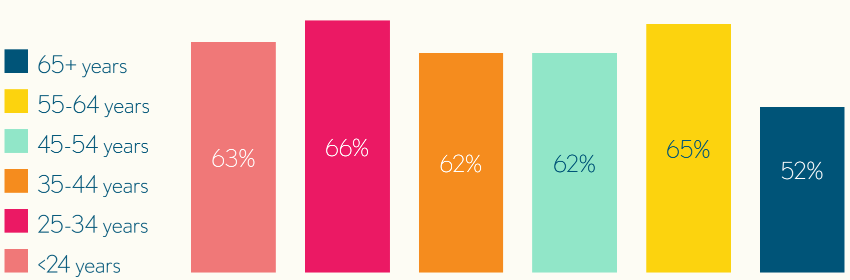
## HIGH INTEREST IN RETURN VISITS

The majority of respondents expressed great interest in returning to the city of interview.

41% said they were very interested in returning. Not surprisingly, respondents visiting friends/family were especially very interested in returning (63%).
Furthermore, respondents who had previously visited the city were very interested in returning again. 63% of respondents visiting for the fifth time were very interested in returning.
Respondents travelling independently were slightly more interested in returning with 66% being interested or very interested. Among group travellers, 60% were interested or very interested in returning for another visit.

More than 50% in each age group said they were either interested or very interested in returning. The oldest age group were the least interested, but still 52% indicated that they were interested or very interested in returning. In all other age groups, more than 62% of the respondents expressed an interest in returning.

INTEREST IN RE-VISITING



## BEAUTIFUL AND CLEAN SCENERY ARE KEY REASONS TO RETURN

Across all cities, "Beautiful" was mentioned many times in the open-ended answers as a reason for a wish to return to the city of interview.

Furthermore, many respondents mentioned the good environment when they wrote about their best experience. Description of the good environment included cleanliness, blue skies and fresh air, but respondents also emphasized the good environment in relation to cultural and historical sites.

Respondents also expressed that if they were to return, they would like to visit more of the country and to get a more in-depth experience of the destination, including gaining more knowledge about the culture and history of the destination.

## FIRST-TIME VISITORS AND THE OLDEST RESPONDENTS ARE LEAST LIKELY TO RE-VISIT

11% said they were either "not interested" or "not interested at all" in returning to the city of interview.

First time visitors to Europe were more likely to state that they would not return, as well as respondents of the oldest age group, where 18% indicated that they did not wish to return.

In their own words, as provided in the open answers, respondents found the city boring or small with not a lot of things to do or see.
Other respondents had poor experiences with thieves or were so dissatisfied with accommodation that they had no wish to return. A few also mentioned that the Nordic countries were expensive and that shopping was limited.

# THE BEST AND WORST OF THE NORDIC DESTINATIONS

FRESH AIR WAS AMONG THE BEST EXPERIENCES OF THE CHINESE VISITORS WHEN IN THE NORDIC REGION WHILE HIGH PRICES AND THE WEATHER WERE PART OF THE WORST EXPERIENCES. OVERALL, CHINESE TRAVELLERS REPORT MORE GOOD EXPERIENCES THAN NEGATIVE, TRAVELLING HOME WITH THE EXPERIENCE OF A CLEAN, BEAUTIFUL AND FRIENDLY NORDIC REGION.

## THE NORDIC AIR IS THE BEST EXPERIENCE

The majority of respondents wrote only very short sentences or even just one or two words when asked to describe their best experience with the city of interview or their overall visit to the Nordics.

The key words related to the positive experiences of Chinese visitors, when visiting the Nordic region, are represented in the word cloud (the bigger words represent words more frequently mentioned).

Many respondents highlighted more than one experience. "Good air ", "good environment", "beautiful view" as well as "shopping" were the most frequently mentioned positive experiences.

One respondent wrote: *"People here are nice and polite, and their smile makes me feel good. What's more, the fresh air and moderate temperature here makes me feel very comfortable."*

> "我觉得这里的人都好亲切很有礼貌，他们都很有笑容，让我的心情也变。
>
> 而且这里空气清新，温度适中，让我感觉很舒服。"

Some of the positive experiences mentioned were specific attractions and locations, such as Hamlet's Castle and the Fjords of Norway.

When dividing respondents into cities of interview, the cities did not differ much from one another.

In Copenhagen, attractions like Hamlet Castle and the Little Mermaid were mentioned more frequently. In Stockholm and Helsinki, the nature and the fresh air were most frequently mentioned, and in Gothenburg, some also mentioned shopping as their best experience.

N=1,355

## THE WEATHER WAS THE WORST EXPERIENCE

The key words related to the negative experiences of Chinese visitors, when visiting the Nordic region, are represented in the word cloud (the bigger words represent words more frequently mentioned). When respondents were asked about their worst experience, the most frequent answer was "None". Across the destinations, 31% said - in different wordings - that they had no bad experiences in the cities.

These "non-negative" answers have been excluded from the word cloud focusing on negative experiences. With regards to negative experiences, words related to the weather was mentioned most times. Especially, the changeable weather was an issue.

Lack of public toilets was especially an issue among respondents in Helsinki. Respondents in Stockholm found the prices and the public transportation to be their worst experience. The latter included the lack of clear information and guidance in the public transportation system:

*"The exit signs of public transport and subways didn't display clear guidance"* as one respondent explained. "公共交通地铁出口指示不清楚"

In Copenhagen, respondents commented mostly on the weather, but also the lack of good quality Chinese food:

*"The food of some Chinese restaurants should have tasted better. They don't represent the Chinese cuisine culture."*

"某些中国餐馆餐食的味道应该更好些，现在的并不能代表中国饮食文化。"

In Gothenburg, negative experiences were especially related to the lack of acceptance of Chinese credit cards.

N=857

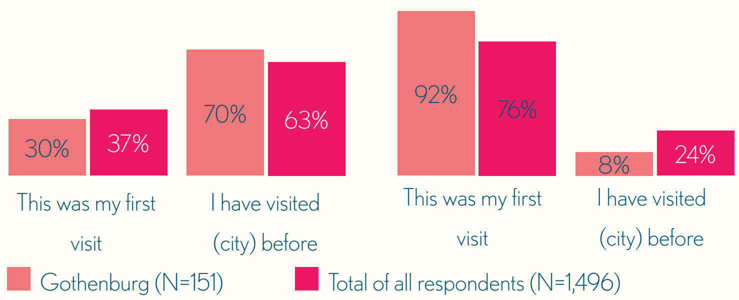
# CITY PROFILES

# GOTHENBURG

## GOTHENBURG IS POPULAR AMONG GROUP TRAVELLERS

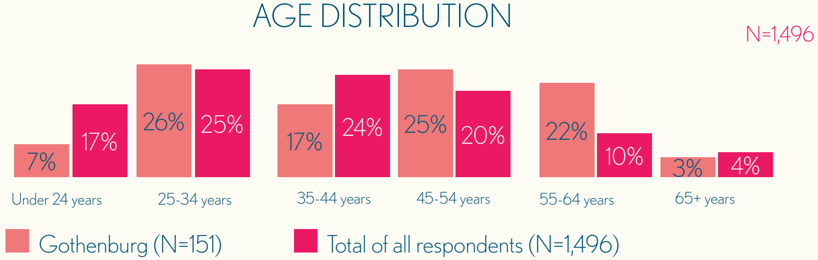
Respondents interviewed in Gothenburg made up 151 of the 1496 respondents in the sample. Gothenburg had the smallest share of first-time visitors to Europe, yet the highest percentage of first-time visitors to the city.

FIRST-TIME VISITS AND RETURN VISITS




Gothenburg also had the oldest respondents among the four cities with the largest share of group travellers (57%).

AGE DISTRIBUTION




In Gothenburg, recommendations from friends and online recommendations of the destination, were indicated as extremely important.

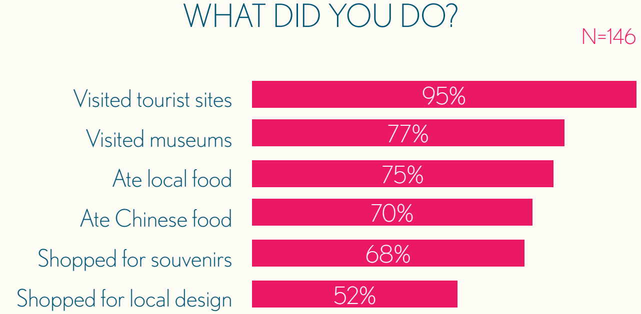
More than 50% of respondents in Gothenburg said recommendations from friends were extremely important to them, when choosing a destination.

As in the other cities, printed maps and information in Chinese were considered important. Especially, for the group travellers, where 86% listed information in Chinese as either important or very important.

52% FOUND FRIENDS' RECOMMENDATIONS VERY IMPORTANT

All respondents were asked what they did while visiting the city. Looking across the four cities there was no difference in the top five activities. Visiting tourist sites was the most popular activity among respondent. For Gothenburg, as many as 95% of the respondents stated that they visited tourist sites during their visit.

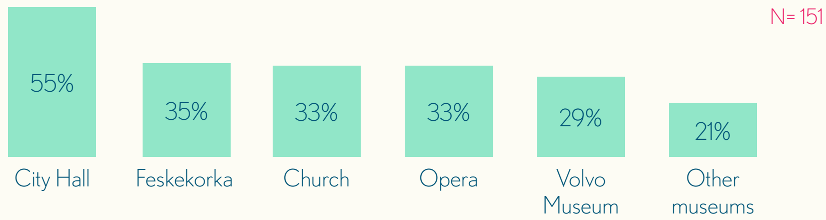
WHAT DID YOU DO?




## VISITED ATTRACTIONS

In Gothenburg, the Chinese tourist were asked if they visited specific attractions in the city.

## MOST VISITED ATTRACTIONS IN GOTHENBURG




In total 120 out of the 151 respondents listed which attractions they visited, while the rest did not answer or wrote that they had just been walking around the city.

The most visited attraction was the City Hall. The second most visited attraction was the 'Feskekorka', which is a marketplace for fresh fish and seafood. More than 1 in 3 respondents had visited this market.

Respondents, who had searched for information beforehand about Gothenburg, had a higher tendency to visit an attraction, once they arrived in the city.

Especially the Volvo Museum was almost exclusively visited by respondents who had searched for information beforehand.

## CLEAN, BEAUTIFUL AND SMALL CITY

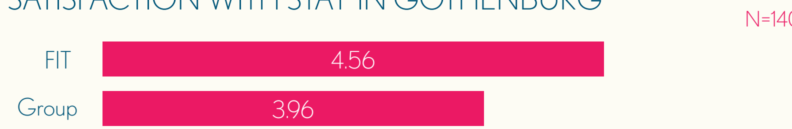
The most part of Chinese travellers had a 'very good' experience in Gothenburg.

In addition, respondents found the city to be clean and beautiful, especially the harbour area was highly praised. It was also mentioned that the city was small, which some respondents liked and others disliked.

## SATISFIED VISITORS

Chinese visitors to Gothenburg were finally asked to rate their stay in Gothenburg on a scale from 1-5, with 5 being very satisfied.
The total mean for all respondents was 4.23, which is a high and positive average.

## SATISFACTION WITH STAY IN GOTHENBURG




When looking at the difference between independent travellers and group travellers, the independent travellers were significantly more satisfied with their stay than the group travellers.

# COPENHAGEN

## COPENHAGEN FOR THE YOUNGER TRAVELLERS

Respondents interviewed in Copenhagen made up 416 of the 1496 respondents in the sample.

Though Copenhagen had the youngest respondents of the four cities, the city received an equal distribution of respondents travelling by group and independently.
Respondents from the youngest age group showed similar behaviour as the older respondents preferring group travelling.

Copenhagen was the city with most first-time visitors to Europe. 46% of the respondents in Copenhagen had never been to the continent before this visit. A high percentage (83%) of travellers visited Copenhagen for the first time. First-time visitors were especially prevalent among group travellers.

73% OF RESPONDENTS WERE UNDER THE AGE OF 45

## HOLIDAY TRAVELLERS HAVE THE SHORTEST STAYS

79% of the respondents were on holiday, which was the highest share across all cities. Respondents in Copenhagen had 2.14 bed nights on average in the city. However, the holiday traveller only had 1.97 bed nights on average.

Holiday travellers preferred hotels as choice of accommodation, but Airbnb was a popular choice among the independent travellers.

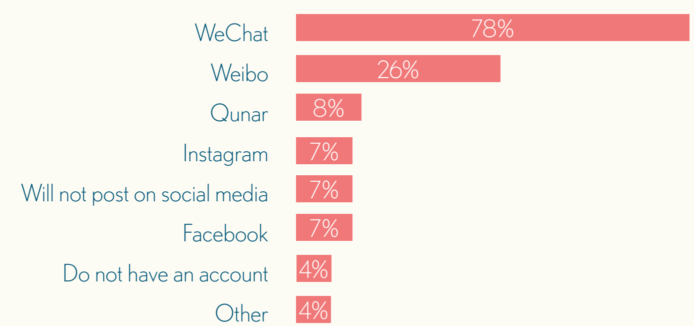
18% OF FITS STAYED AT AIRBNB

95% OF GROUP TRAVELERS STAYED AT HOTEL

The Chinese travellers visiting Copenhagen were the most active users of social media. 89% of the visitors in Copenhagen had posted or were intending to post about their journey on a social media platform. The preferred platform was WeChat, used by 78%. However, more than 30% used more than two social media platforms.

N = 485 - 512

USE OF SOCIAL MEDIA



## COPENHAGEN IS SUITED FOR A WINTER TRIP

Respondents in Copenhagen were asked which city they would consider for a winter trip. The Chinese travellers in Copenhagen selected Copenhagen to be most suited for a winter trip.
However, there was a tendency, that respondents found the city they visited, or had recently visited, most suited for a winter trip.

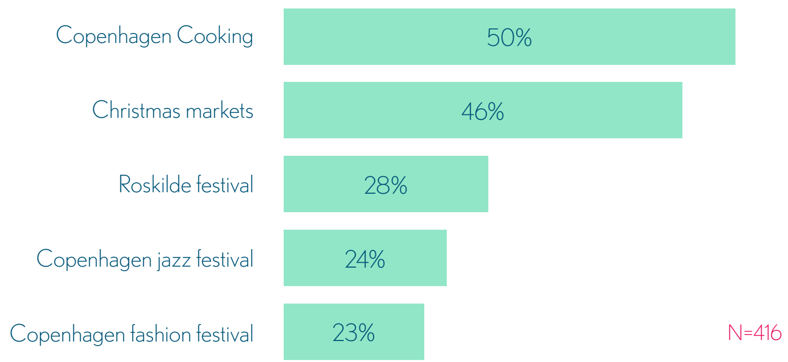
## MAPS IN CHINESE ARE IMPORTANT

29% of the respondents interviewed in Copenhagen received or picked up a city map in Chinese.
Among the respondents who have stated that information in Chinese was very important, 37% received or picked up a city map in Chinese.
Among the respondents in Copenhagen who did not find information in Chinese important, 14% received or picked up a city map.

## COPENHAGEN COOKING & FOOD FESTIVAL HAS POTENTIAL

The Copenhagen Cooking & Food Festival, as well as the Christmas market in December, were festivals/events that most respondents would consider visiting.
These answers do not indicate that respondents intend to return nor that they know the events in detail, but they demonstrate a potential point of interest among the Chinese visitors in Copenhagen. 44% of the respondents (in all cities) had searched online for local cuisine prior to departure, and as many as 76% had tried local food while visiting.

INTEREST IN CITY FESTIVALS



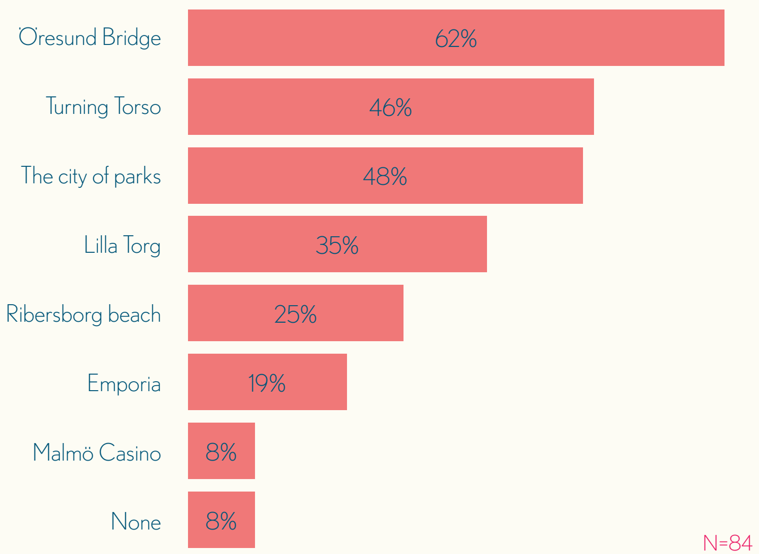
## MALMÖ AS PART OF COPENHAGEN

20% of respondents in Copenhagen had also visited Malmö, and an additional 20% were aware they could visit Malmö by train within 30 minutes from Copenhagen.
When asked about their familiarity with Malmö, only respondents who had visited the city knew the attractions in Malmö. Therefore, answers from respondents, who have already visited Malmö, are the only answers included in the graph below.

The Chinese travellers were most familiar with the Öresund bridge, but also the landmark of Turning Torso was recognized by the Chinese visitors.

Conclusively, respondents were asked to rate, on a scale from 1-10, how likely it was that they would visit Malmö in the future. 34% of the respondents said that it was very likely that they would visit Malmö in the future. Of these respondents who would like to visit Malmö in the future, 26% had already visited the city on the present trip.

### WHICH SITES IN MALMÖ HAVE YOU HEARD OF?



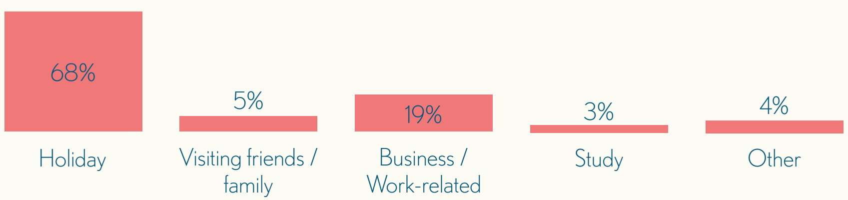
# HELSINKI

## HELSINKI HAD THE MOST BUSINESS TRAVELLERS

With 525 of the respondents interviewed in Helsinki, they made up more than 1 in 3 of the total sample.
1 in 3 of the respondents in Helsinki were business travellers.
37% of the respondents in Helsinki were interviewed during fall, and this might have had an effect on the large number of business travellers. Yet, the majority of respondents in Helsinki had travelled for holiday purposes.

NATURE OF STAY

N=525




## BUSINESS TRAVELLERS STAY LONGER

The average length of a stay in Helsinki was 2.30 nights. Business travellers tended to have longer stays than travellers on holiday. 45% of business travellers were visiting the city together with their colleagues, and 32% brought family or friends along with them on their business trip.

BUSINESS TRAVELLERS STAYED ON AVERAGE 4.4 DAYS

32% OF BUSINESS TRAVELLERS WERE JOINED BY FAMILY MEMBERS OR FRIENDS

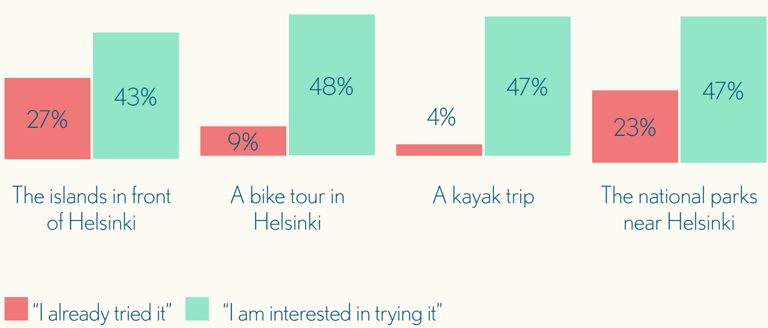
Hotel was the preferred accommodation, but like the results in Copenhagen, Airbnb was popular among the respondents travelling independently.

13% OF FITS ON HOLIDAY STAYED AT AIRBNB

## ISLANDS IN FRONT OF HELSINKI IS INTERESTING

Even though there was a high interest in visiting nature sites near Helsinki, only 1 in 4 had visited the islands in front of Helsinki or the national parks around the city.

INTEREST IN ACTIVE & NATURE EXPERIENCES




N=512

20% had tried a Finnish sauna, 9% had tried a kayak and 4% had been on a tour in Helsinki.

When looking at the differences between group travellers and independent travellers, there was a tendency for the independent travellers to have higher activity levels than the group travellers.

As a follow-up, respondents were asked about their interest in trying a Finnish sauna. As many as 47% of the respondents visiting Helsinki said they would be interested in trying a Finnish sauna, while another 20% had already tried this.

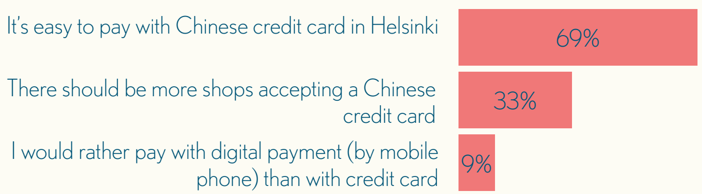
## EASY TO PAY WITH CHINESE CREDIT CARD

Almost 70% of the respondents found it easy to pay with a Chinese credit card in Helsinki. This number increased slightly when dividing respondents into group travellers and independent travellers. 73% of the group travellers found it easy to pay with a Chinese credit card compared to 65% of the independent travellers.
The percentage of those who found it easy to pay with a Chinese credit card increased with age.

The Chinese respondents were asked if they agreed with the statement "More shops should accept Chinese credit cards". 1 in 3 respondents agreed to this statement. More independent travellers than group agreed to the statement, and especially the independent business travellers thought more shops should accept Chinese credit cards.

With regards to other forms of payment, 9% agreed that they would rather use digital payment than a credit card. This was mainly a preference among independent travellers and among age groups of 44 years or younger.

EASY PAYMENTS WITH CHINESE CREDIT CARDS




N=517

# STOCKHOLM

## HIGHEST SHARE OF INDEPENDENT TRAVELLERS IN STOCKHOLM

In Stockholm, 404 respondents completed the survey. Stockholm had most respondents from Beijing and the southern parts of China. Almost all respondents from Hong Kong and Taiwan were in Stockholm.

59% OF RESPONDENTS WERE INDEPENDENT TRAVELLERS

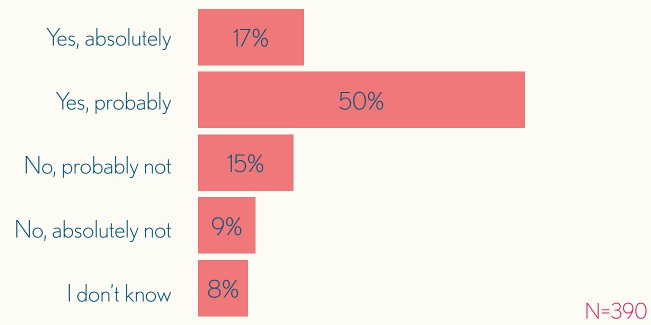
Stockholm had the highest share of independent travellers. Almost 60% of the respondents in Stockholm were independent, and of those, 74% were under the age of 45.

The large number of independent travellers also resulted in a longer average length of stay. Stockholm was the city with the longest average stays across all four cities. The respondents in Stockholm stayed 2.81 bed nights on average. Specifically for the independent travellers, the average length of stay was 3.30 bed nights.

## THE YOUNG ARE MORE LIKELY TO RETURN DURING WINTER

The respondents interviewed in Stockholm were asked whether they would consider returning to Stockholm during the winter season. In total, 67% of the respondents would to some extent consider returning.
The share of independent travellers, who said they wanted to return, was just a bit higher than the group travellers, but not significantly.

WOULD YOU ALSO CONSIDER VISITING STOCKHOLM DURING THE WINTER MONTHS?




Looking at age, the propensity to return to Stockholm during the winter season decreased with age, with almost 80% of those less than 24 years old wanting or possibly wanting to return to the city and less than 51% of those aged above 55 years indicated a wish to return to the city.

75% OF THOSE UNDER 35 WOULD CONSIDER RETURNING DURING WINTER

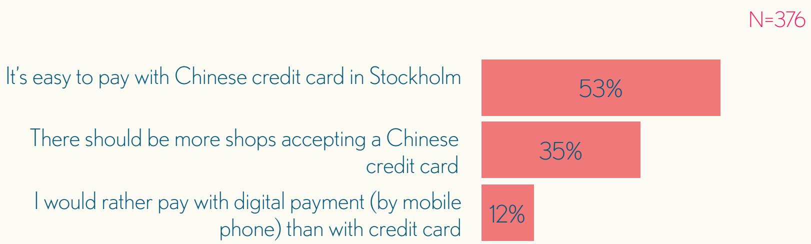
## WILL NOT RETURN BECAUSE OF THE COLD

Those who stated that they would not return during the winter season, explained this with reference to the weather. 81% of the 83 respondents, who stated a reason for not returning in the winter, indicated the cold weather as the primary reason. 19% emphasized the lack of light and the shorter days as reasons for not returning in the winter season.

## EASY TO USE CHINESE CREDIT CARD

In total, 53% of the respondents in Stockholm agreed that it was easy to pay with a Chinese credit card in the city. That satisfaction increased with age.

USING CHINESE CREDIT CARDS IN STOCKHOLM




35% of the respondents thought there should be more shops accepting Chinese credit cards. There was no difference between the answers from different age groups, nor between independent and group travellers to this question.
12% of the respondents would rather pay with digital payment than credit card. Of those who preferred digital payment, 75% were independent travellers and 72% were younger than 44 years old.

## MORE THAN HALF WOULD RECOMMEND STOCKHOLM

The respondents were asked to name three words, they associate with Stockholm. Close to 50% chose to answer. Some of the words most frequently mentioned were "Good", "beautiful" and "scenery". Swedish brand names like Volvo and Ikea were also high-lighted several times.

Finally, respondents were asked to rate how likely it was that they would recommend Stockholm as a destination. They were asked to answer on a scale from 0-10, where 0 was very unlikely and 10 very likely.
The overall average for all respondents was 7.85. 51% indicated a score of either 9 or 10, which means that they were very likely to recommend Stockholm as a destination.
Travellers above 65 years of age were slightly more likely to recommend Stockholm, but there was no significant difference between age groups.