THE CHINESE TRAVELLER

TO COPENHAGEN

February 2020

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INTRODUCTION

This report explores Chinese visitors traveling to Copenhagen. The report is the latest of four reports published in 2012, 2014 and 2016.

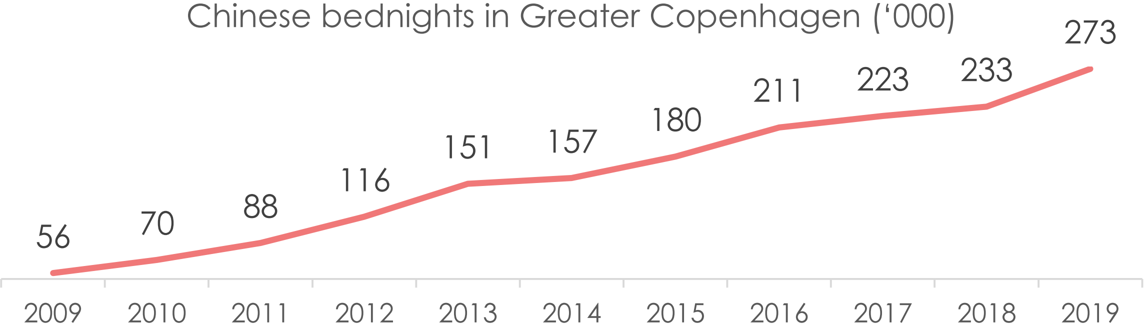
A similar study was conducted in Arlanda airport in Stockholm. These results are presented in a separate report and can be found at www.chinavia.dk.

Overview of the Chinese outbound travel market

China has been the world's largest source market for outbound tourism since 2012. In 2018, China accounted for almost150 million outbound trips (+15%) and Chinese tourists spent over USD 277 billion (+5%) during their travels abroad.[I]

The increase in outbound trips from China can also be seen in Greater Copenhagen. Within the last 10 years the number of bednights in Greater Copenhagen has increased with more than 380%. China is now the 9th largest international market in Copenhagen, and a total of 273,000 bednights was made by Chinese tourists in Greater Copenhagen an increase of more than 17% compared to 2018.

Chinese bednights in Greater Copenhagen ('000)



I: UNWTO 2019: Guidelines for Success in the Chinese Outbound travel market

METHODOLOGY

Data was collected by the company Wilke at Copenhagen airport from the 4th of July to the 25th of September 2019. The interviews were conducted in Chinese and answers registered on an iPad.

Two screening questions were used to make sure that the respondent were in fact Chinese citizens and had visited Copenhagen. In total, 404 respondents participated in this survey. The results presented in this report will in many cases exclude the 11% (46) of the respondents who stated they were here on business and therefore did not receive all the questions. If business travellers are indeed included, the sample size consists of 404 respondents and a star* has been added to denote this inclusion.

Due to the sample size, the statistical uncertainty of the results is relatively high when two questions are cross tabulated and subgroups are being created. Therefore, the results presented in this report should only be seen as trends that need to be further investigated if critical decisions are to be based on the results.

When necessary results in this report will be compared with the overall average 'City-break tourist' in Copenhagen, as well as results from previous visitor reports (2012, 2014 and 2016) and other relevant reports.

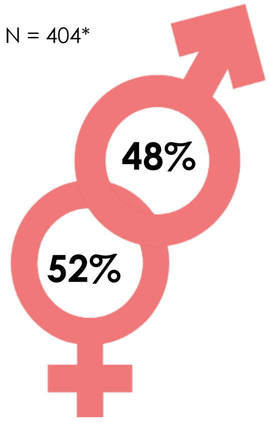
PROFILE OF THE RESPONDENTS

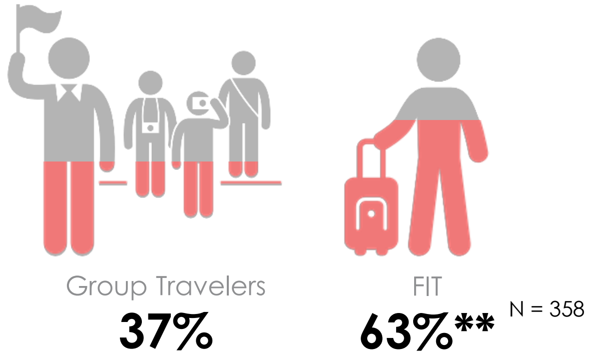
DEMOGRAPHICS

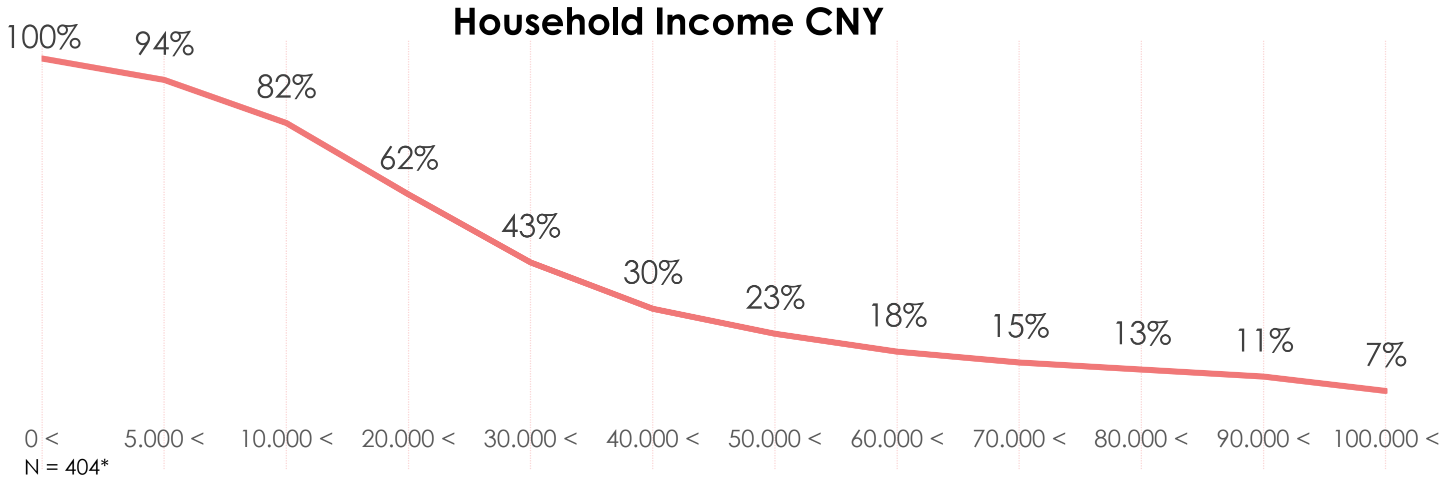
In this study there is almost an equal share of men and woman among the respondents with the majority being younger travellers below the age of 45. Less than 20% of the respondents are above the age of 45. The average age of the respondents is 35 years. When asked about their monthly household income 43% of the respondents stated it is above 30.000 CNY, 18% stated it is above 60.000 CNY and 11% stated it is more than 90.000 CNY. This shows a large increase in the average household income compared to the previous surveys. In 2016 30% had an income above 30.000 CNY and only 9% had a household income above 50.000, which can be an effect of the increased economic growth that China has experienced.

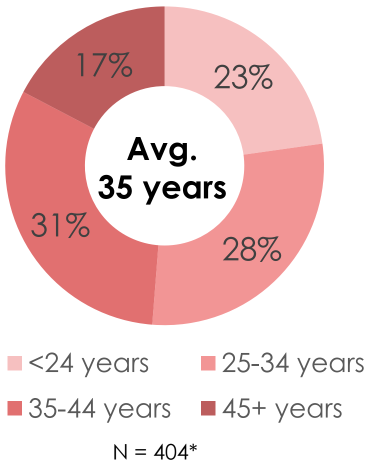
The majority of respondents stated that the purpose of their visit to Copenhagen was mainly leisure, while 11% travelled to Copenhagen for business and 5% stated it was a combination of business and leisure.

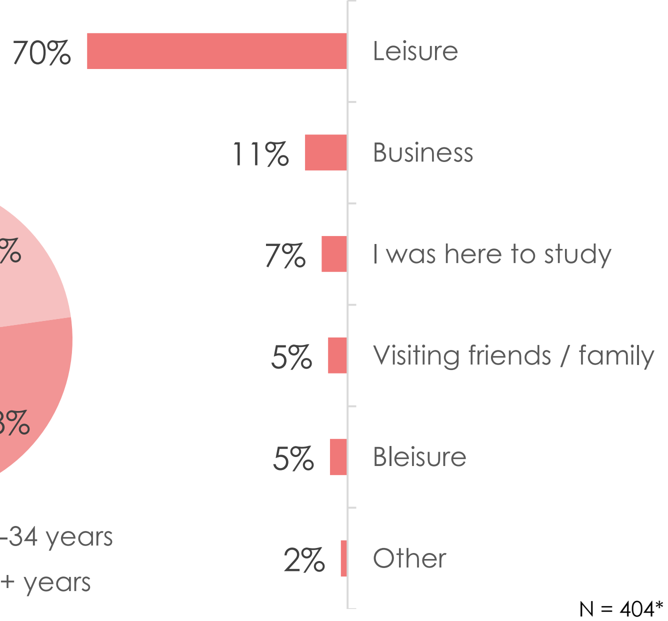
When asked how they would define themselves as a traveller, only 37% of the respondents stated they travelled as part of a group.









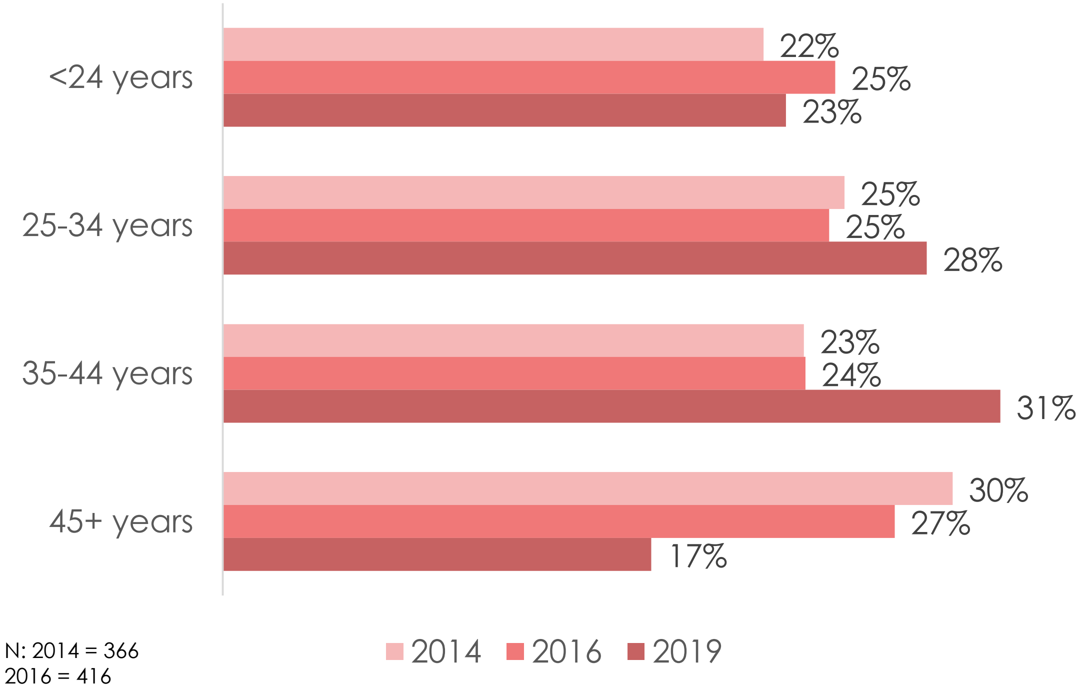


** 3.3% defined themselves as Semi-independent (i.e. a travel agency has designed my itinerary and handled all my bookings). In this report semi-independent will be analyzed as free independent travelers.

DEMOGRAPHICS

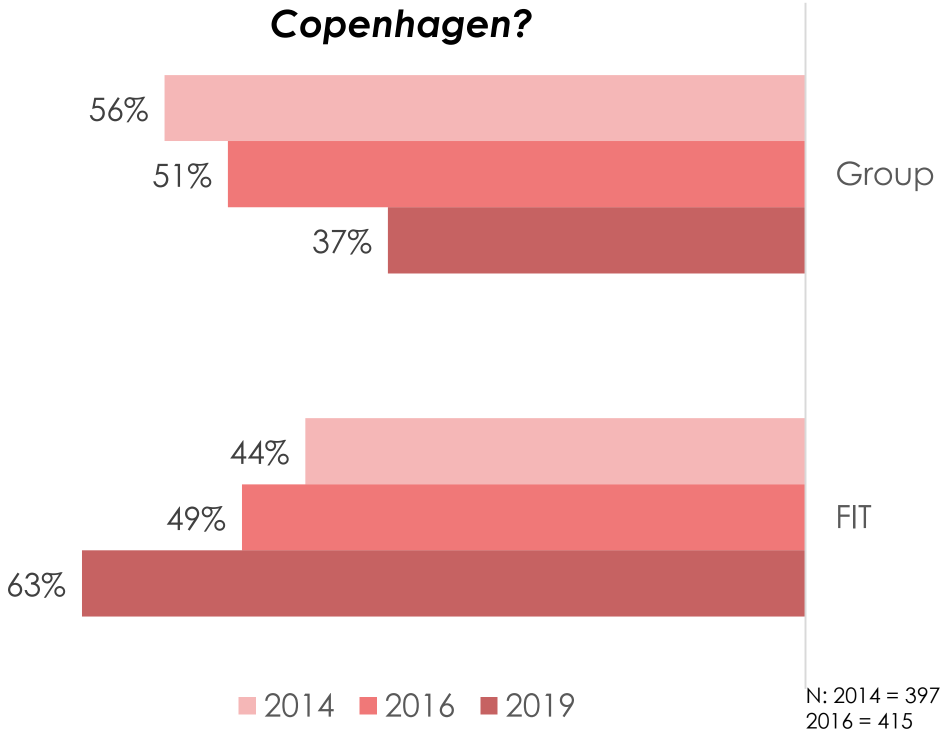
In recent years, the number of group travellers has slowly decreased in favour of the Free Independent Travellers (FITs). The number of FITs now makes up 63% of travellers to Copenhagen and 54% of the leisure travellers. In 2016 these numbers were 57% and 43%, respectively.
Looking at the age distribution, the number of respondents between 35-44 years has increased while the group above the age of 45 has decreased significantly compared to the results from the 2014 and 2016 studies.

AGE



N: 2014 = 366
2016 = 416
2019 = 404*

How would you define yourself as a traveller on this trip to Copenhagen?



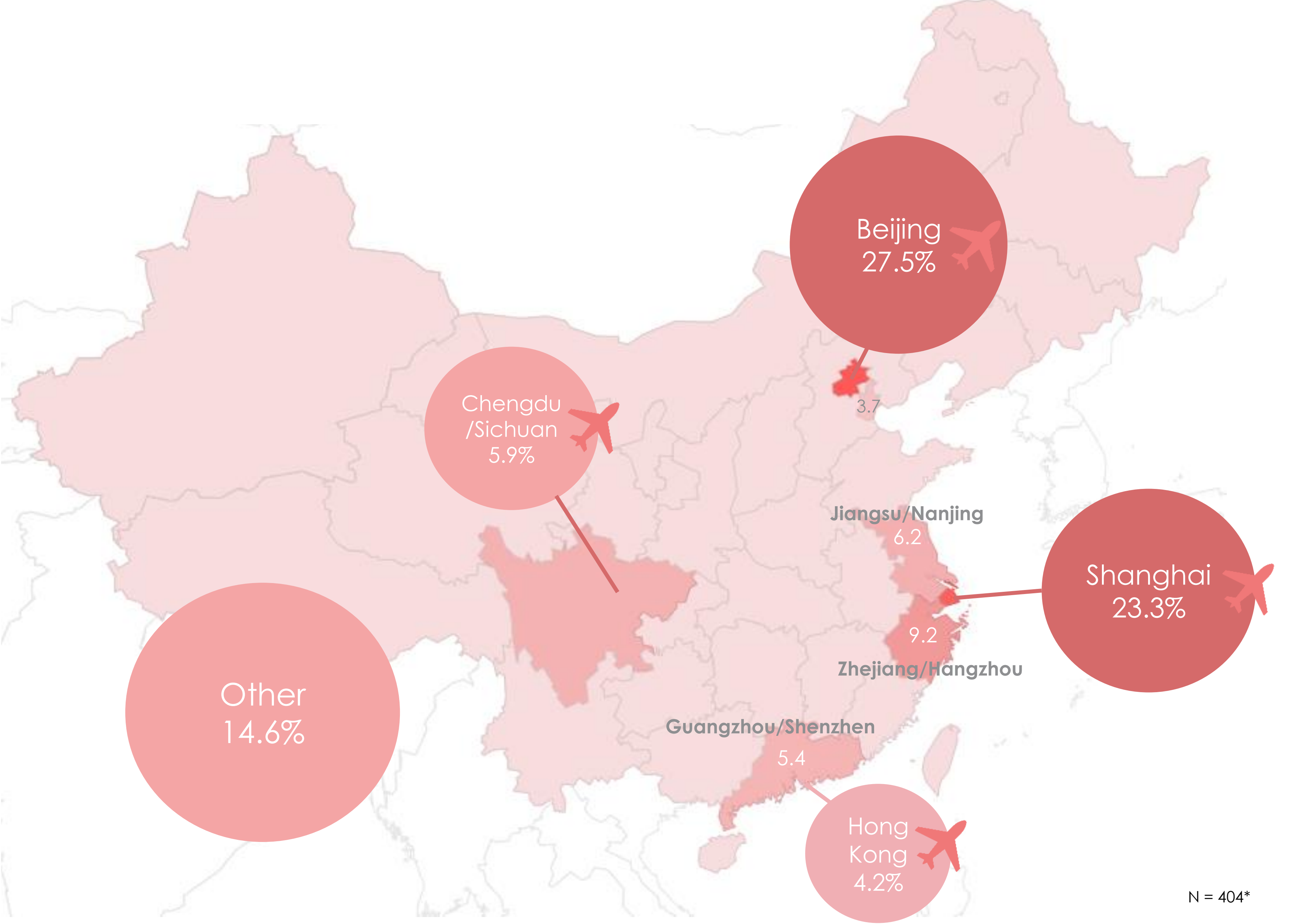
N: 2014 = 397
2016 = 415
2019 = 358

AREA OF RESIDENCE

The main part of the respondents came from Beijing (28%) and Shanghai (23%) and the surrounding areas and regions. Both cities have direct routes to Copenhagen. Approx. 4% came from Hong Kong, which also has a direct route to Copenhagen.

In comparison, 6% came from Chengdu, which has a route to Copenhagen, but with a stopover in Helsinki.

The remaining respondents came from other parts of China, making up 14%.



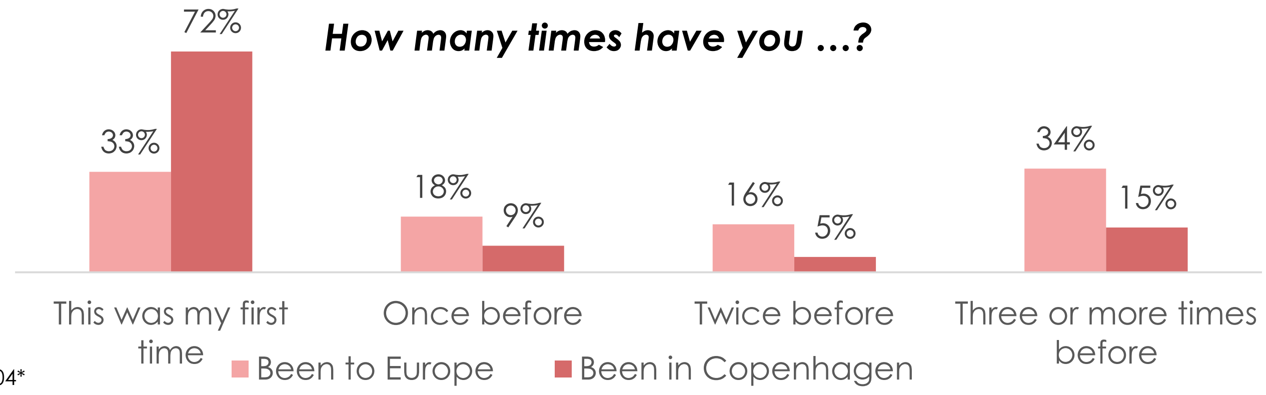
N = 404*

TRAVEL EXPERIENCE

Among all the Chinese travellers in this study, 33% of the respondents are visiting Europe for the first time. This number is considerably higher for group travellers (45%) than for FITs (30%).

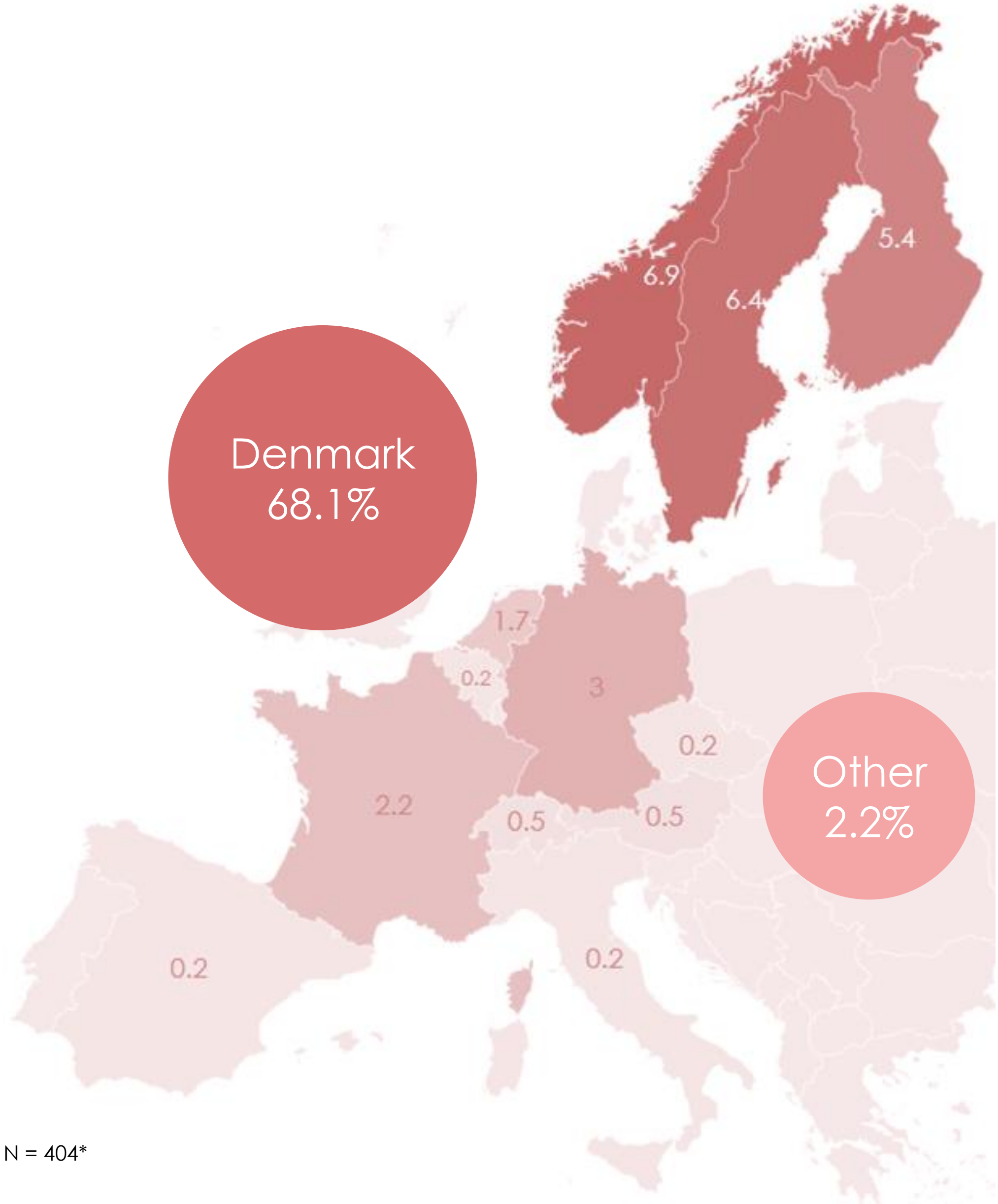
For 72% of the respondents it was their first time in Copenhagen. This number has decreased since 2016 where 82% of the respondents were first-time visitors to Copenhagen. Nonetheless, this number is still much higher than the average international city-break tourist in Copenhagen - only 52% of the average international city-break tourists are visiting Copenhagen for the first-time.[1]

Denmark was the first point of entry into Europe for the majority of the respondents. Other entry points include Sweden, Norway and Finland.



N = 404*

What was your point of entry into Europe?



N = 404*

1. Visit Denmark, 2018 *Storbyturister I København*

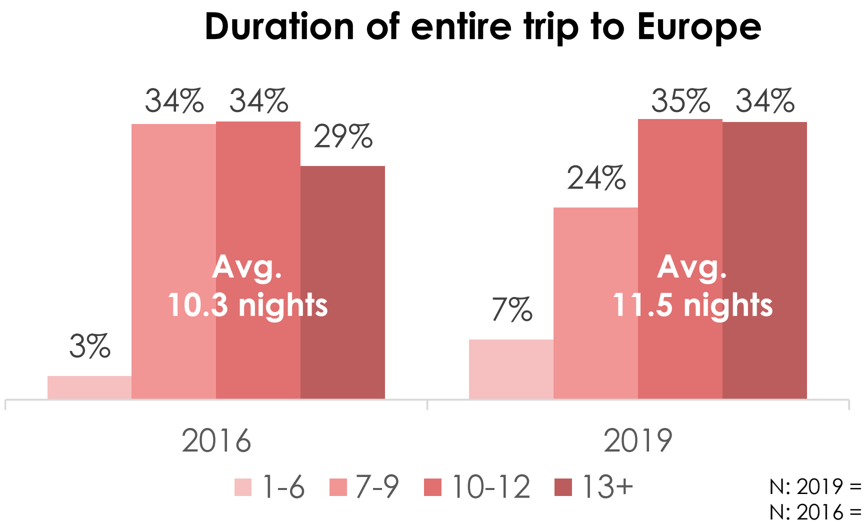
TRAVEL DURATION

DURATION OF TRIP FOR LEISURE TRAVELLERS

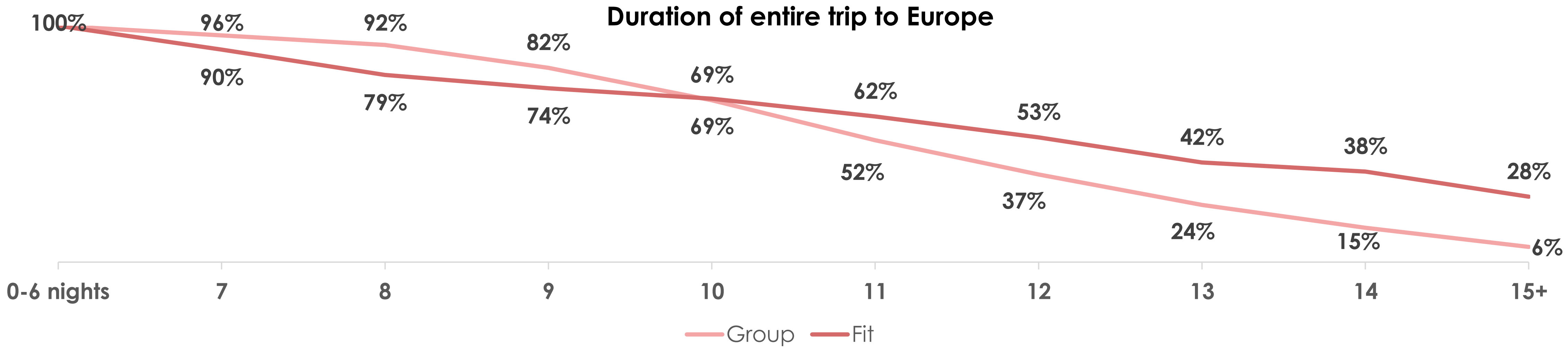
The average duration of the entire trip for leisure travellers is **11.6** nights. This is an increase of 1.3 nights compared to the 2016 survey.

There is a difference of one night between the travel length of FITs(12.1) and group travellers(10.9). This is an increase of 1.3 nights for FITs and 1.0 night for group travellers compared to the 2016 study.

Although 69% of both group travellers and FITs stay 10 nights or more, 38% of the FITs travel for two weeks or more while this is only the case for 15% of the group travellers.



N: 2019 = 283
N: 2016 = 309



N: 2019 = 283

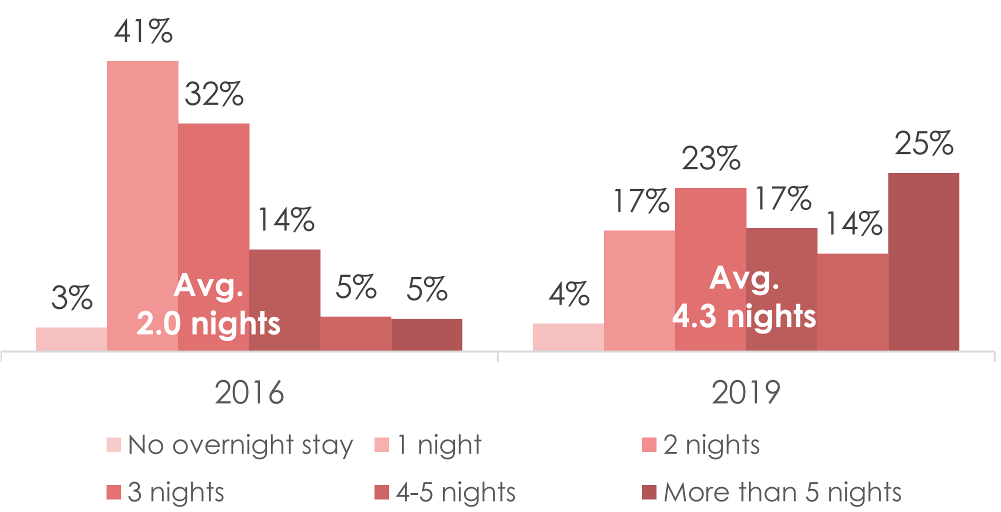
LENGTH OF STAY IN COPENHAGEN FOR LEISURE TRAVELERS

WONDERFUL COPENHAGEN

The number of days the respondents are staying in Copenhagen has more than doubled from 2.0 days in 2016 to 4.3 days in 2019.

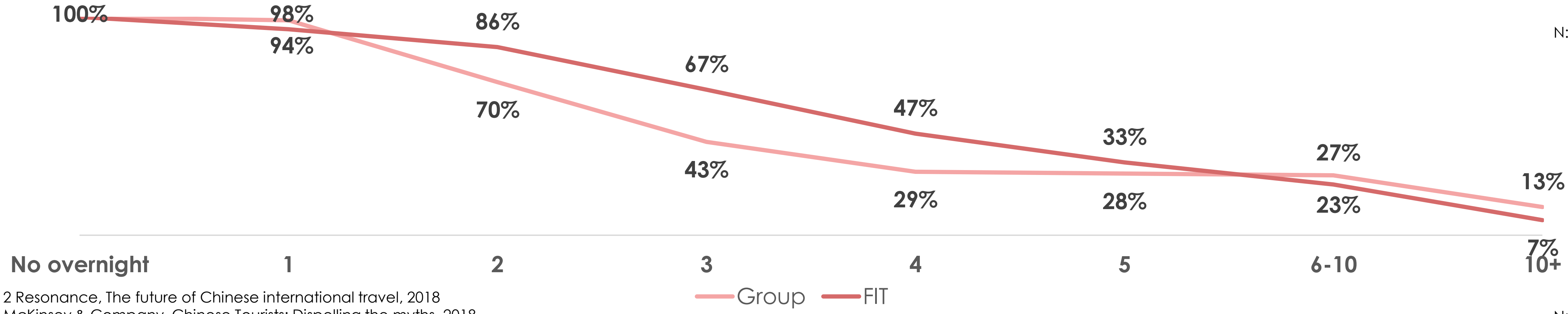
There is only a slight difference between FITs (an average of 4.3 nights) and group travellers (an average of 4.1 nights). There has in particular been a big change in group travellers' travel patterns. Thus, the number of group travellers staying more than one night in Copenhagen has increased from 40% in 2016 to 70%. Also, the number of group travellers staying four nights or more has increased from less than 10% in 2016 to one in four. These results are supported by several other studies that have found similar increases in both duration of trip and length of stay, expecting it to further increase in the future.[2]

What is the duration of your stay in Copenhagen?



N: 2019 = 283

Length of stay in city



2 Resonance, The future of Chinese international travel, 2018
McKinsey & Company, Chinese Tourists: Dispelling the myths, 2018
Hotels.com, Chinese International Travel Monitor, 2018

N: 2019 = 283

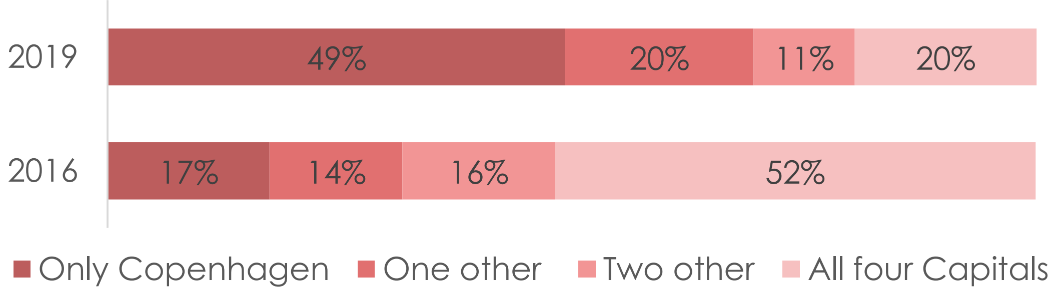
VISITED CITIES

The Chinese travellers are still visiting more than one city when travelling to Scandinavia. However, even though the average length of the trip has increased, the number of cities visited has decreased a little, which is the result of visitors staying longer in each city.

The graph to the right shows the cities that most travellers visit in combination with Copenhagen. The three Nordic capitals, Oslo, Stockholm and Helsinki are still the most common cities to visit, albeit less so than in 2016. The number of respondents taking the classic trip and visiting all four Nordic capitals (i.e. Copenhagen, Stockholm, Oslo and Helsinki) has decreased significantly from 52% in 2016 to 20% in 2019. For group travellers specifically this number has decreased from 80% in 2016 to 44% in 2019.

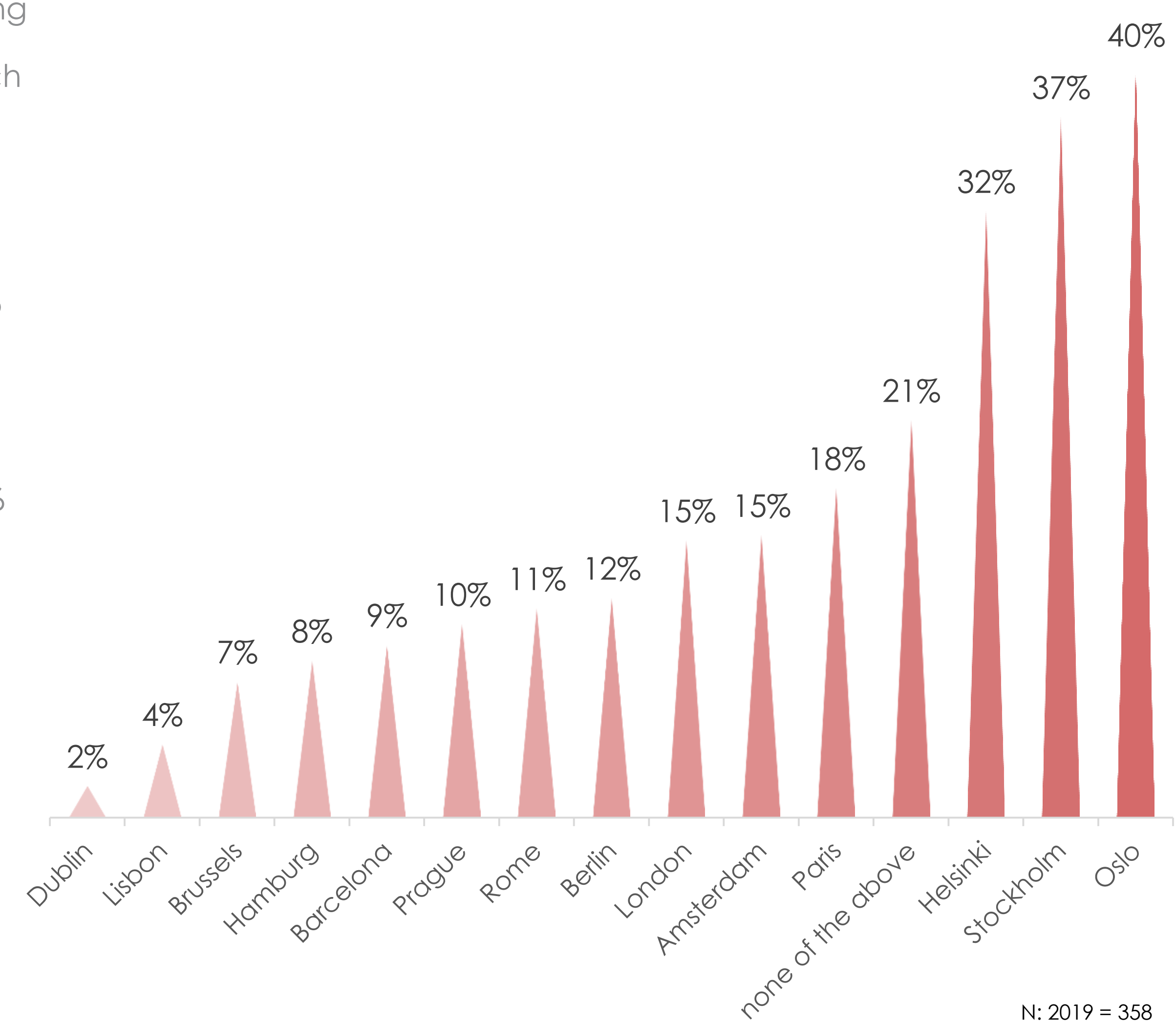
Similarly, the number of travellers choosing only to visit Copenhagen and none of the other Nordic capitals, has increased from 18% in 2016 to 49% in 2019. Almost half of those travellers have visited other cities than the Nordic capitals.

How many of the Nordic capitals did you visit? (Copenhagen, Stockholm, Oslo and Helsinki)



N: 2016 = 384
N: 2019 = 358

Did you also visit any of the following cities before, after or during your vacation in Copenhagen



N: 2019 = 358

BEFORE THE TRIP

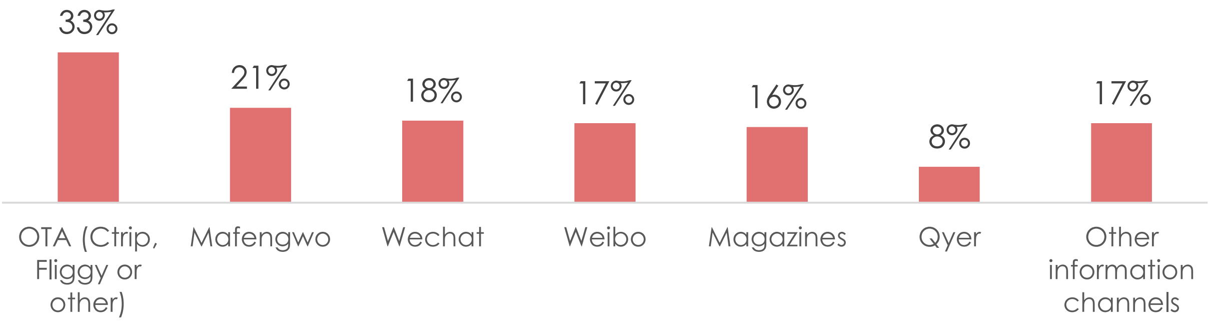
INSPIRATION FOR TRAVEL

Online travel agencies are the most used source of inspiration among the respondents. More than half (56%) of group travellers stated that Online Travel Agencies (OTAs) inspired them to go to Copenhagen. But also one out of five of FITs were inspired by OTAs.

Beside OTA, Mafangwo is the most widely used source of inspiration (21% of leisure respondents). Of those who stated 'other information channel', most referred to friends, family, colleagues or their school as their inspiration for their trip to Copenhagen.

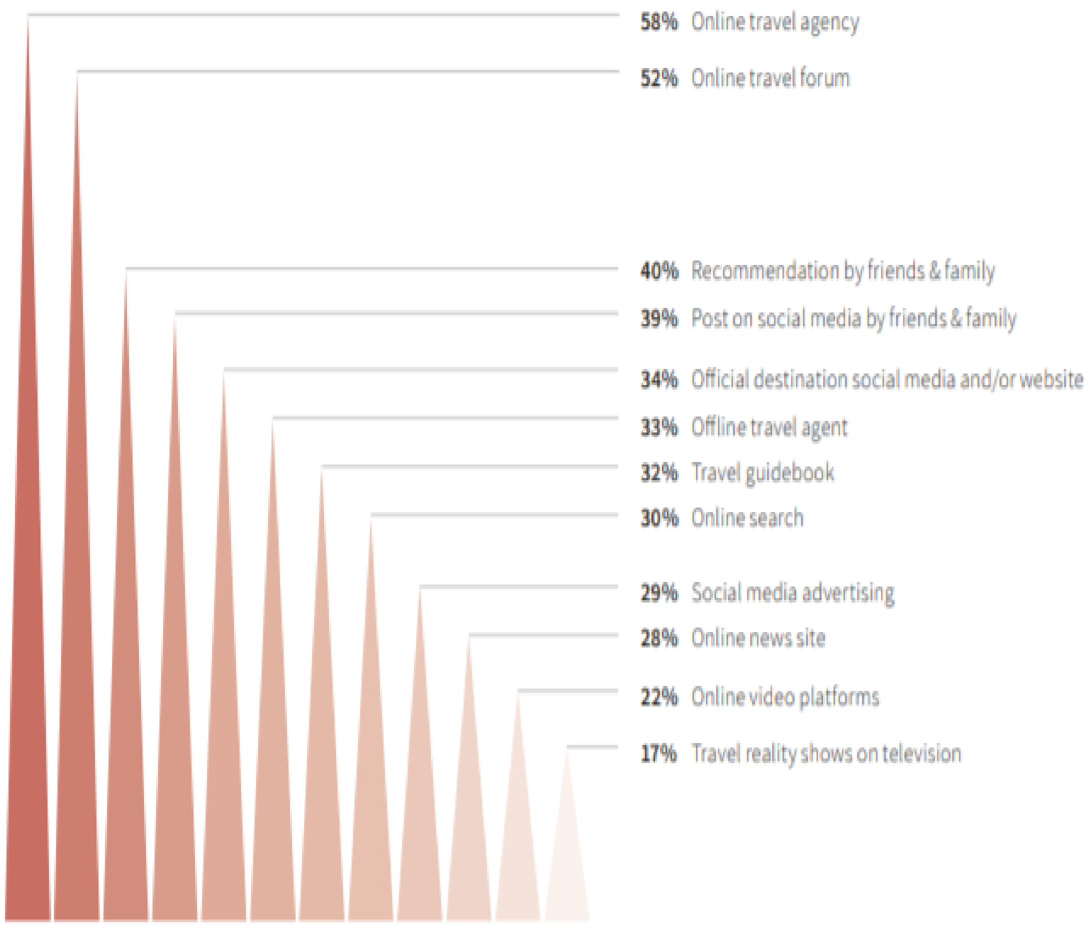
Results from an analysis made by Resonance show that OTAs were the main source of inspiration for more than half of the respondents. Furthermore, 52% stated that online travel forums like Mafengwo and Qyer are the primary source of inspiration when they are choosing a destination.

From which information channel did you get inspired to travel to Copenhagen



N: 2019 = 358

PRIMARY SOURCES OF INSPIRATION WHEN CHOOSING A TRAVEL DESTINATION



N: 3,000
Source:
Resonance: The future of Chinese International travel, 2019

INFORMATION ABOUT THE DESTINATION

Recommendations from friends and family are one of the main sources of inspiration. This is both the case when looking across age groups and travel type.

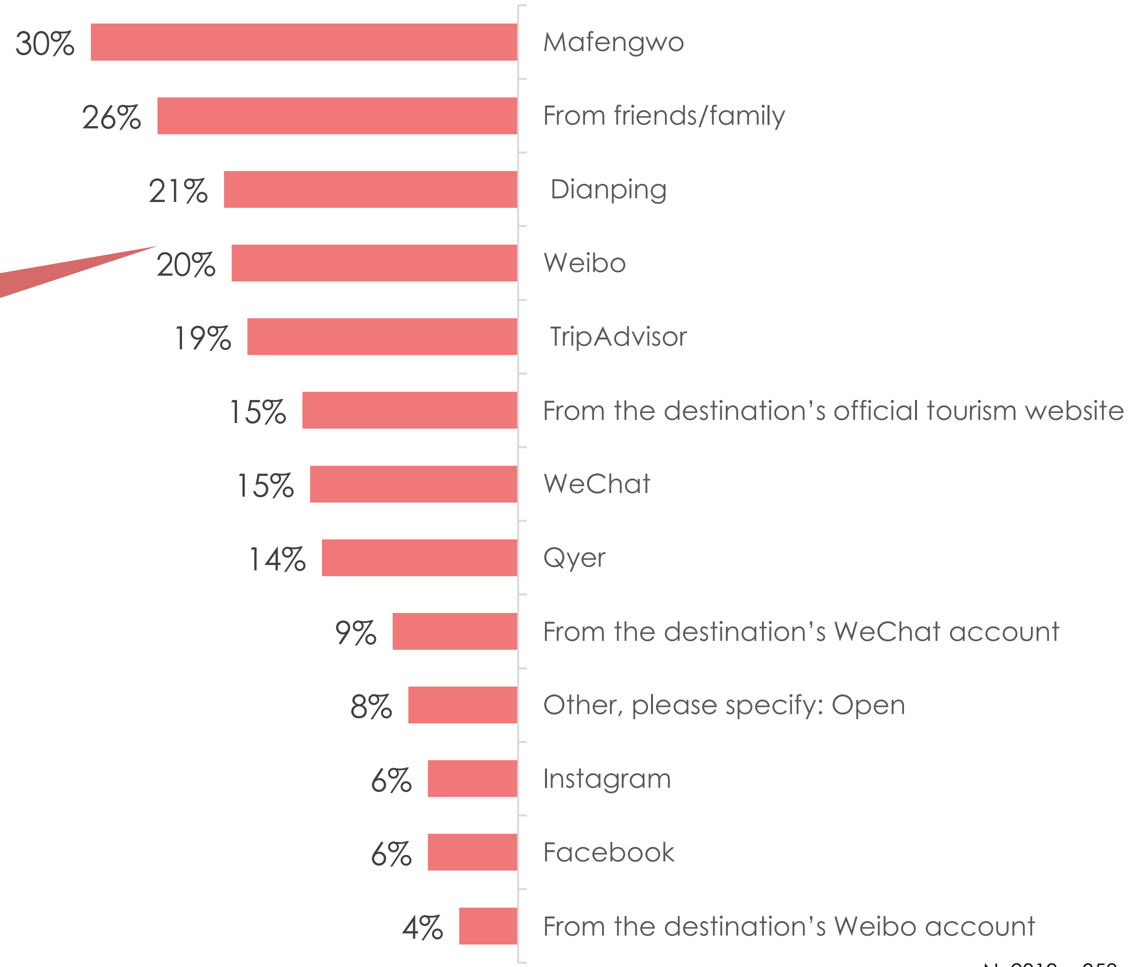
- Mafengwo is the most used source for inspiration by the respondents (30%), but more frequently used by the FITs (37%).
- TripAdvisor is used by 19% of the respondents and is the most used of the western platforms. It is primarily used by FITs (25%), while only 10% of group travellers use it.

Results from the analysis made by Resonance, (see next page) highlights Ctrip as the primary online platform for booking and information searches. This is followed by Qunar and Tuniu with 34% and 28%, respectively. Mafengwo is only used by 15% of the respondents to book and search for information

Mafengwo is more used by those between 25-44 years (36-38%) than those younger (24%) and older(20%)

Weibo is used more by those under 24 years (32%) compared to the other age groups (14-17%

When travelling, where do you usually search for information about the destination?



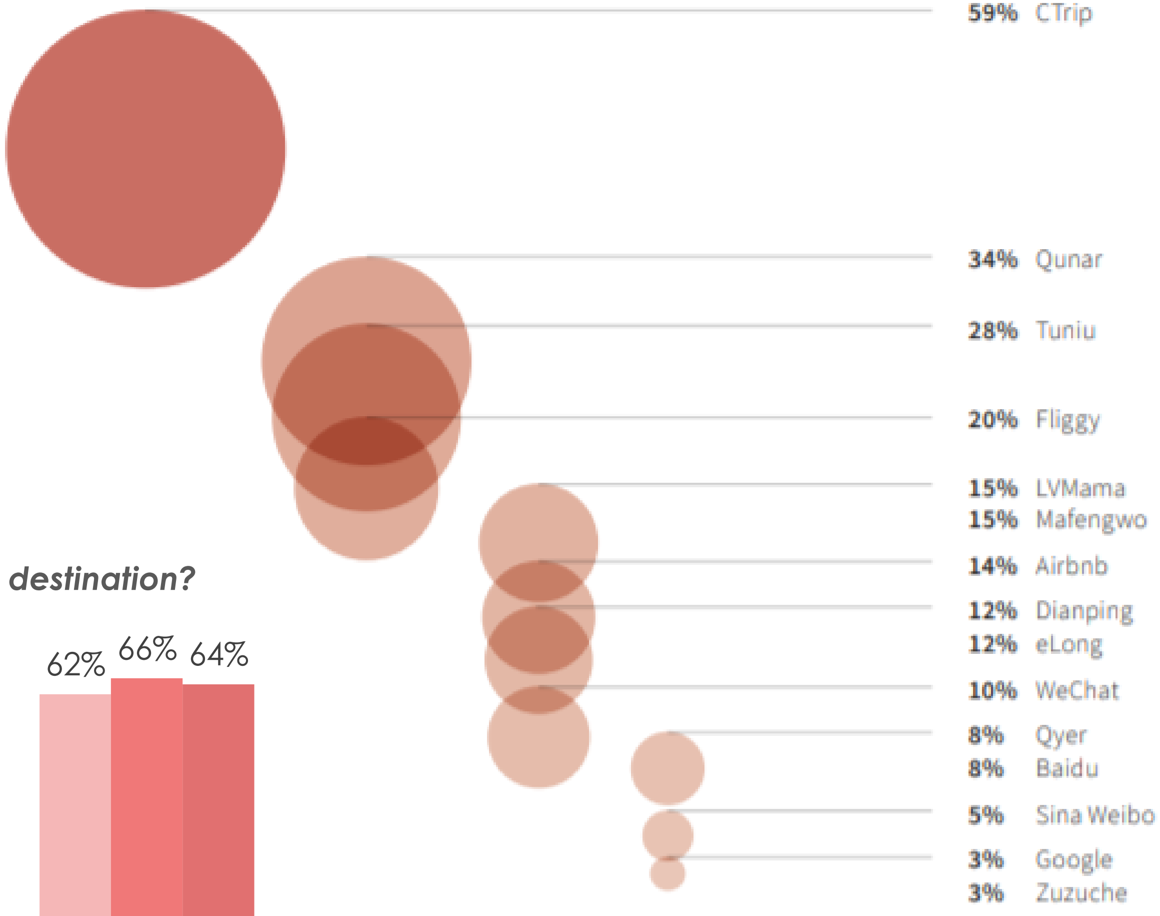
N: 2019 = 358

INFORMATION ABOUT DESTINATION

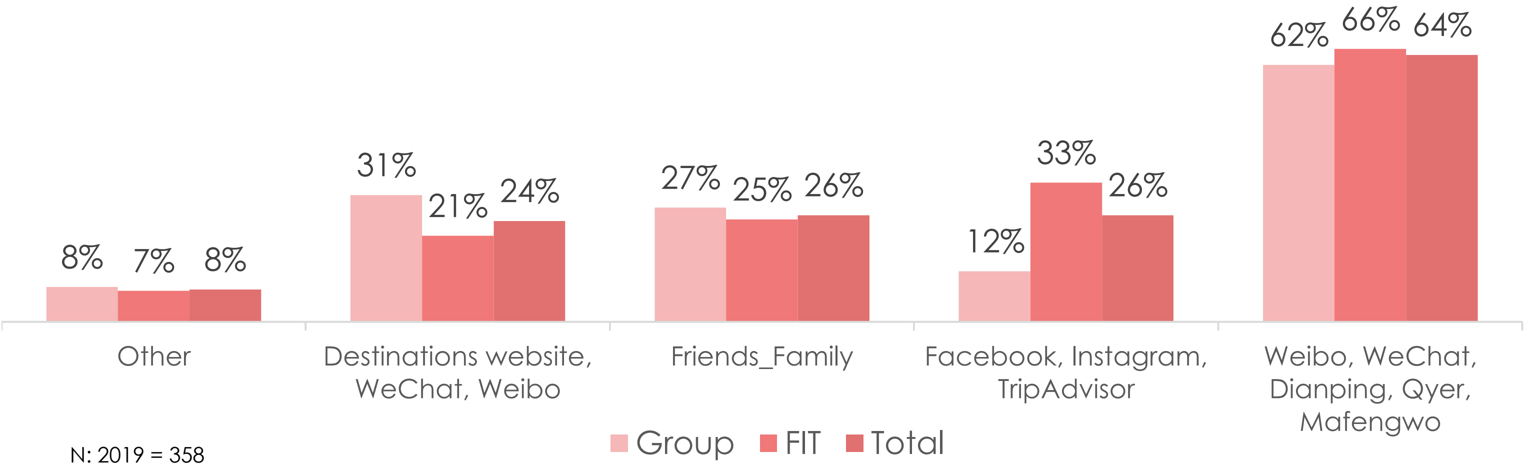
Chinese Social media and travel platforms are used by 64% of the respondents to search for information.

- 44% of the respondents uses either Mafengwo or Dianping
- Western online platforms are used by 26% of the respondents, with TripAdvisor being the most popular. According to the survey, 33% of Fits used these platforms compared to 12% of group travellers.
- The official accounts from the destinations are used by 24% of the respondent. The destination websites are the most popular and used by 15% of the respondents.

PREFERRED ONLINE PLATFORMS FOR TRAVEL BOOKING AND RESEARCH



When travelling, where do you usually search for information about the destination?



N: 2019 = 358

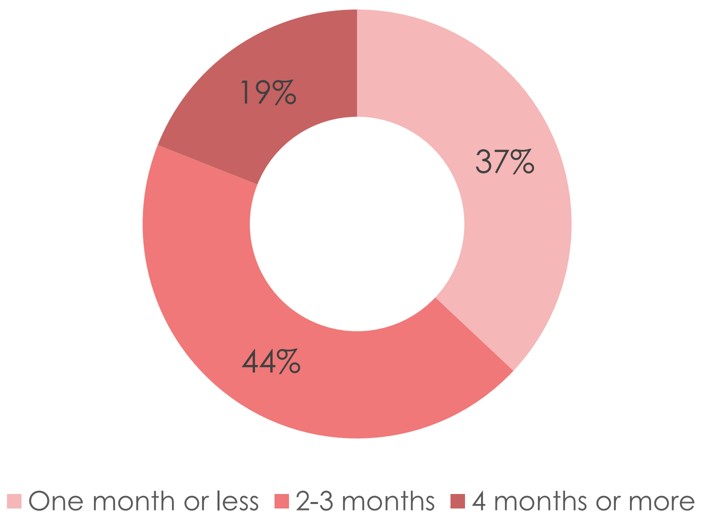
N: 3,000
Source:
Resonance: The future of Chinese International travel, 2019

BOOKING

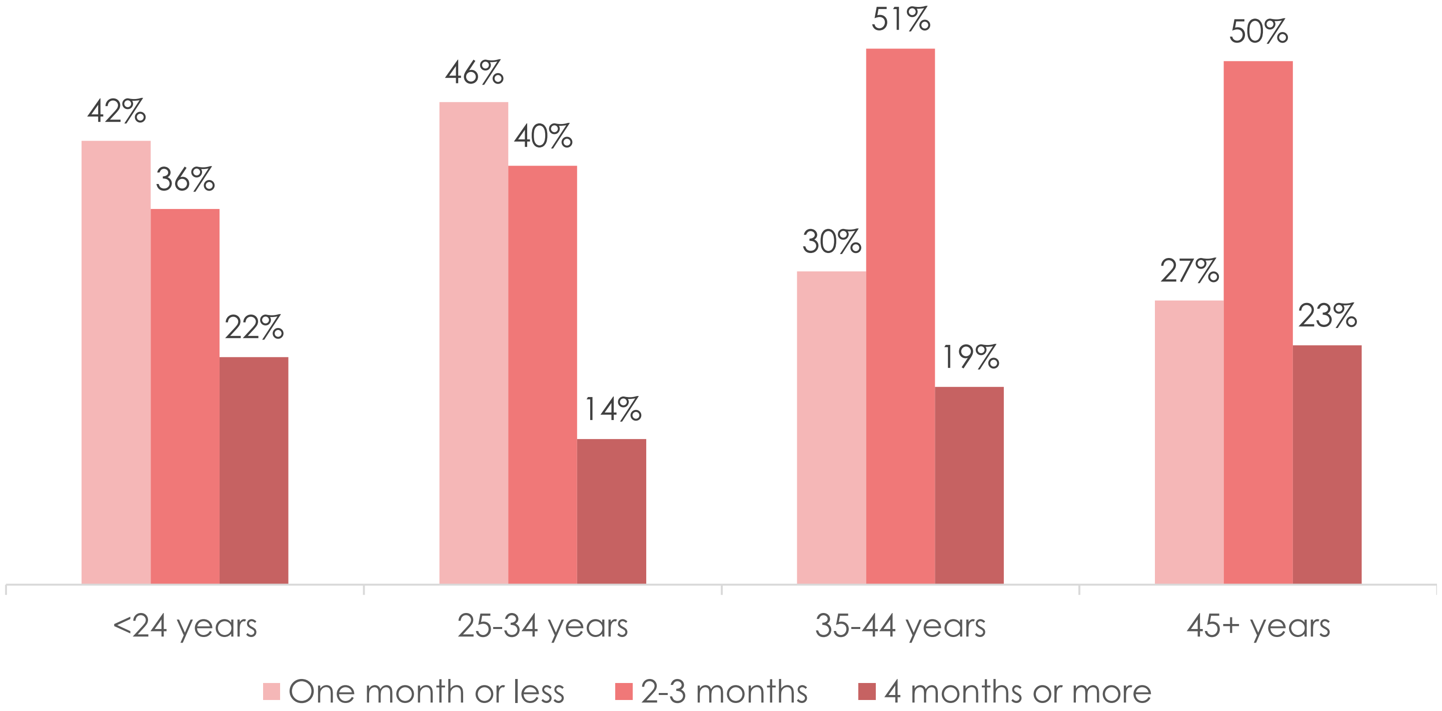
Only 19% of the respondents booked their trip four months or longer before departure. Instead, 44% of the respondents booked their trip between two and three months prior to departure and 37% of respondents booked their trip one month or before.

More than 42% of the respondents in the age group 18-24 years booked their trip less than two months before departure. Although the decision to take the trip might have been made further back, they wait until they are relatively close to the departure date before booking their trip. When looking at Fits and Group travelers, there is no difference in time of booking between the two groups.

How long before your departure did you book the trip?



N: 2019 = 404*



N: 2019 = 404*

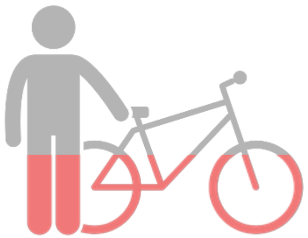
WONDERFUL COPENHAGEN

MOTIVATION FOR VISITING

two out of three Chinese visitors state that Copenhagen's cultural offerings is one of the top five motivations for visiting the city. even put it as their number one motivation.

More than half state that main attractions are a motivation for visiting Copenhagen. 41% claim that experiencing how the locals live is a reason for visiting the city, and although Copenhagen has a large gastronomy scene, only 15% states this as a driver for visiting Copenhagen.

Selected as the primary motivation to visit Copenhagen

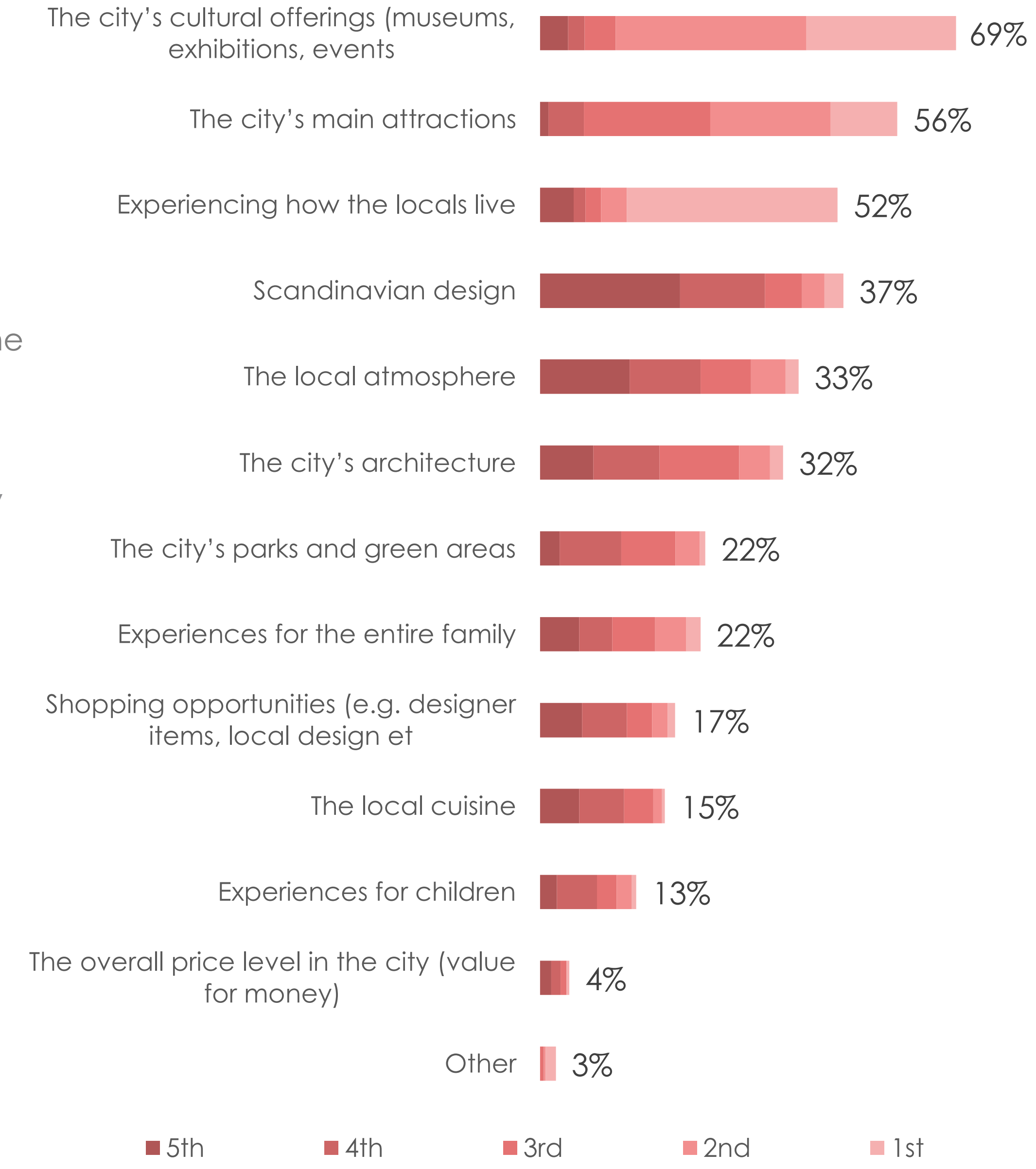


41%
Experience how locals lives

29%
The city's cultural offerings

13%
City's main attractions

Top 5 most important motivations for your choice to travel to Copenhagen



N: 2019 = 358

THE STAY IN COPENHAGEN

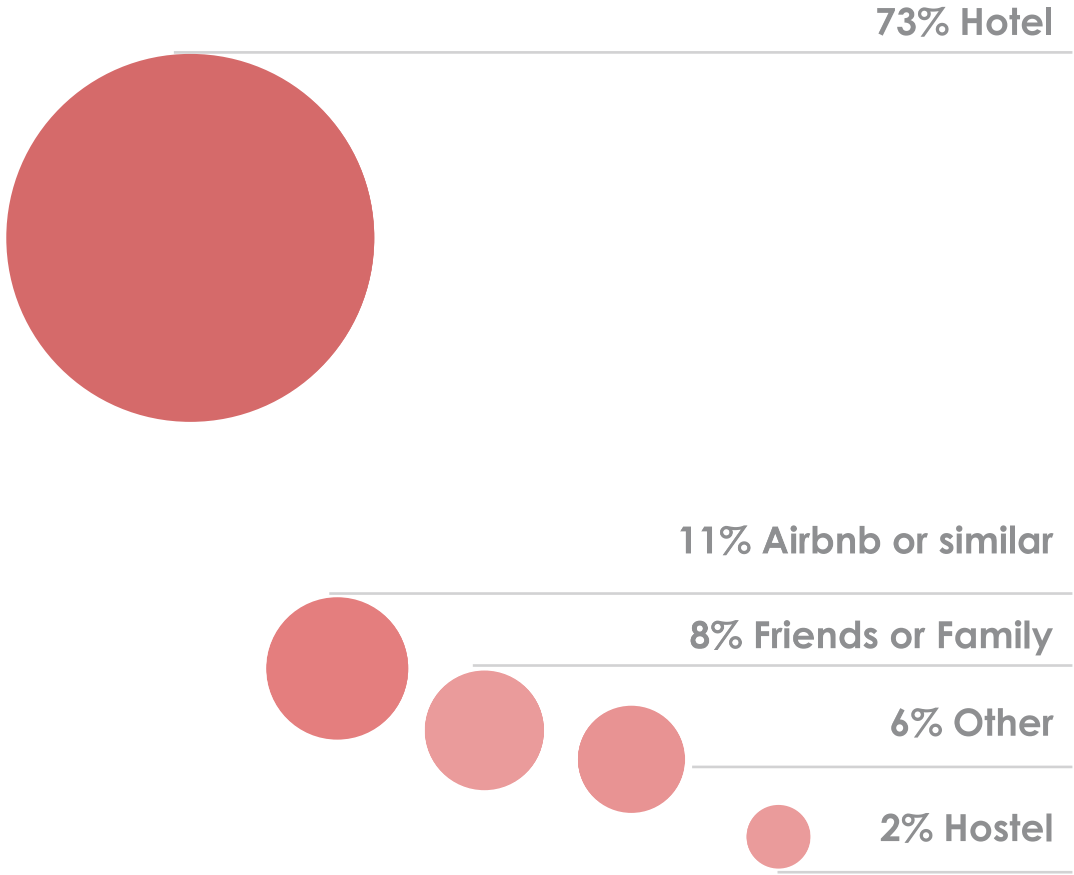
ACCOMMODATION

The preferred choice of accommodation is by far hotel (73%). Among the group travellers, hotels are the primary choice (92%). In comparison, only 59% of FITs chose hotel for their Copenhagen stay.

Private rental such as Airbnb is the second most popular choice, with 11% of the respondents choosing this option. It is almost exclusively FITs who chose Airbnb, as only 3% of group travellers chose this option.

These numbers are almost similar to the study of 2016 and almost match the general distribution of accommodation choices among city-break tourists in Copenhagen, although a larger share of city-break tourists chose to stay at hostels compared to this survey.[3]

17%
of FITs stayed in Airbnb



N: 2019 = 404*

3. Visit Denmark, 2018 *Storbyturister I København*

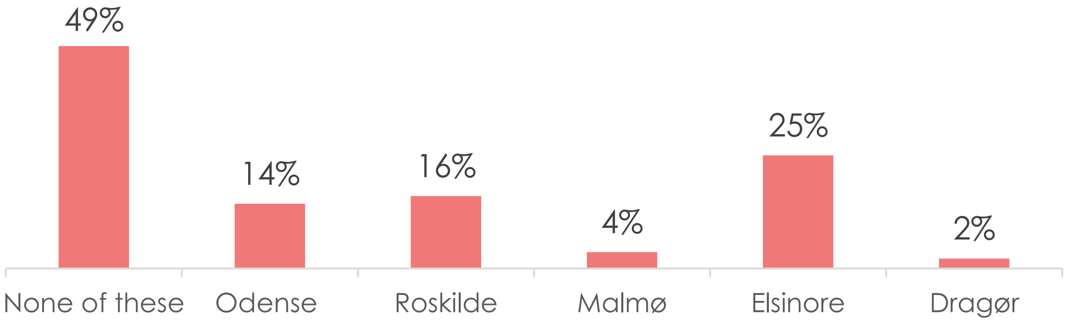
NEIGHBOURHOODS

The Chinese visitors were asked which neighbourhoods they had visited during their stay in Copenhagen. The city center was by far the most visited (78%). On average, the respondents visited 1.6 neighbourhoods, while 37% visited two neighbourhoods,19% visited three, and 8% visited more than four neighborhoods during their stay.

This is a decrease compared to 2018* where the average number of areas visited was 2.8 and where a larger share of respondents visited different neighborhoods**.

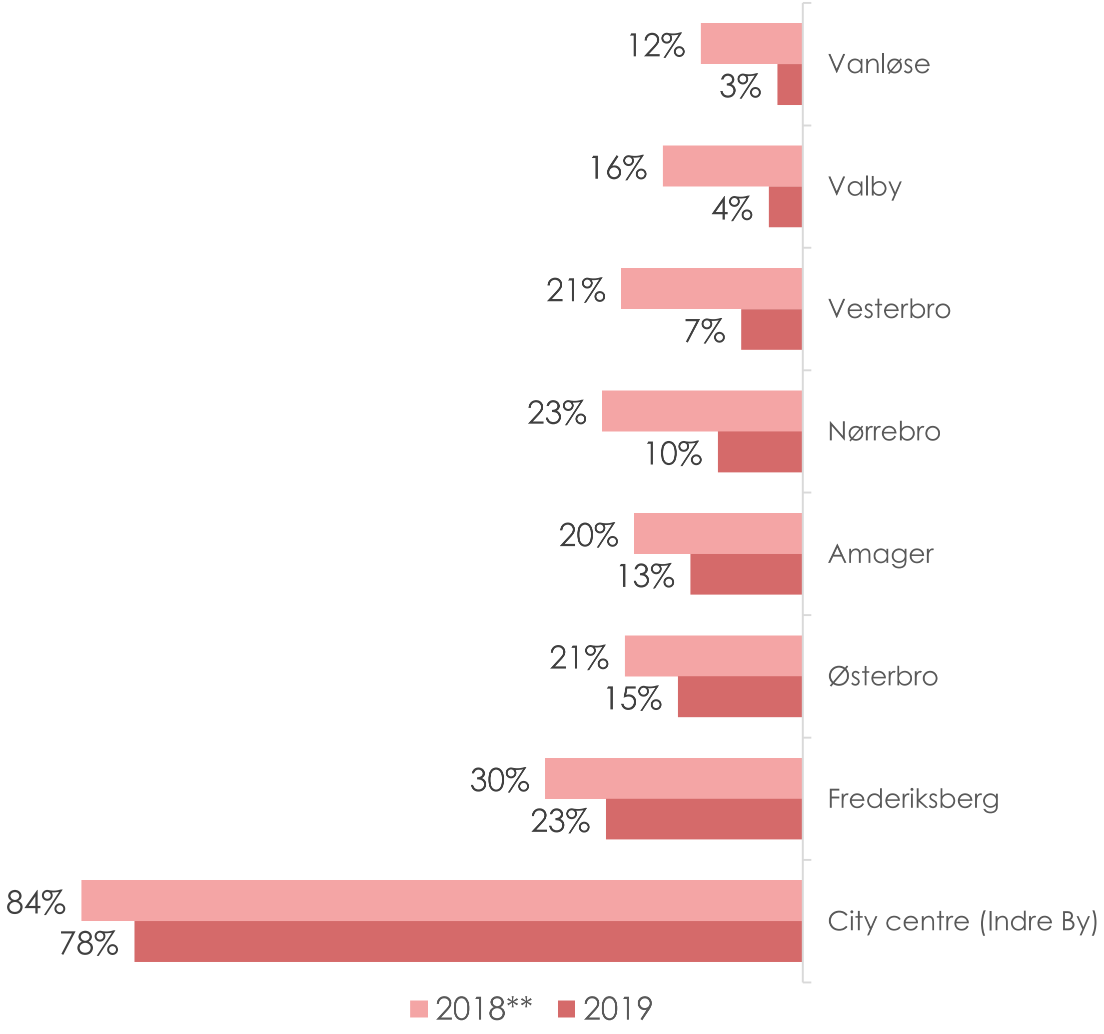
In this study, the Chinese visitors were also asked if they had travelled outside of Copenhagen during their stay. About half of the respondents had visited one of the following cities located outside of Copenhagen: Odense, Roskilde Malmö, Elsinore and Dragør, while 8% visited more than one of these cities.

During your stay in Copenhagen, did you visit any of the following places outside of the city?



N: 2019 = 404*

Which of the following neighborhoods did you visit during your stay in Copenhagen?



N: 2019 = 404*
N: 2018 = 269

*Source: 10x Study: Københavns DNA og Fremtidige potentialer.
**There was a slight difference between the 2018 and 2019 survey as the respondents in 2018 could pinpoint areas visited on a map, which was not available in 2019. This could be a reason for the decrease.

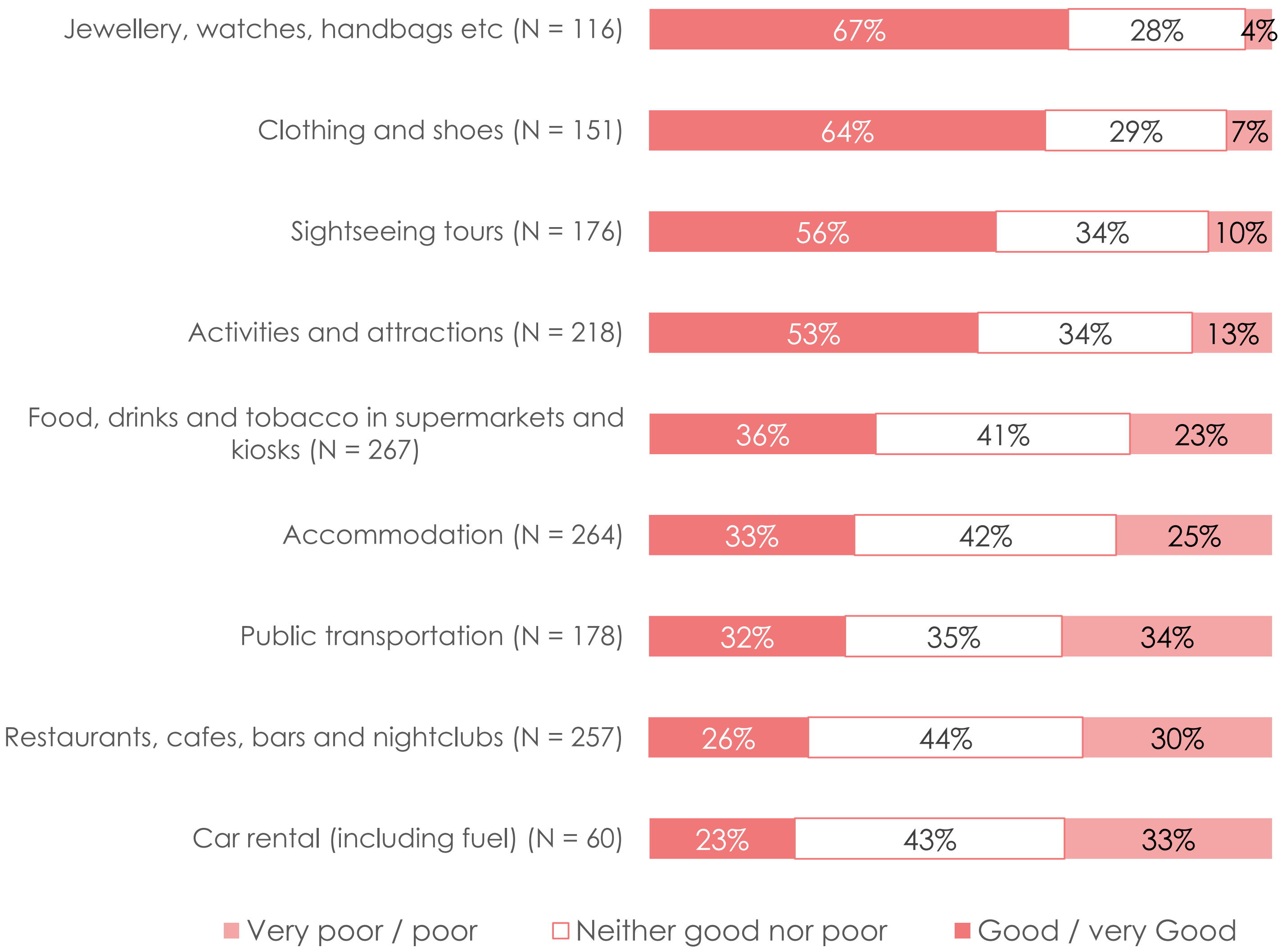
VALUE FOR MONEY

Looking at value for money, the respondents were asked to rate a number of categories.

As respondents could only rate categories relevant to them the number of respondents varies for each category.

The categories with the absolute highest ratings are “Clothing and shoes” and “Jewellery, watches, handbags etc.”, which both relate to shopping. Thus, 60% or more have rated these two categories as ‘good value for money

Public transportation has the highest percentage of respondents which have stated poor or very poor value for money. Of the respondents rating this category, 83% are FITs. We do not know why but answers from a similar survey conducted in 2017 suggest that poor signage and a complicated ticket and zone-system reduce the experience of public transportation.[4]



4: Internationale turisters brug af offentlig transport i hovedstadsområdet

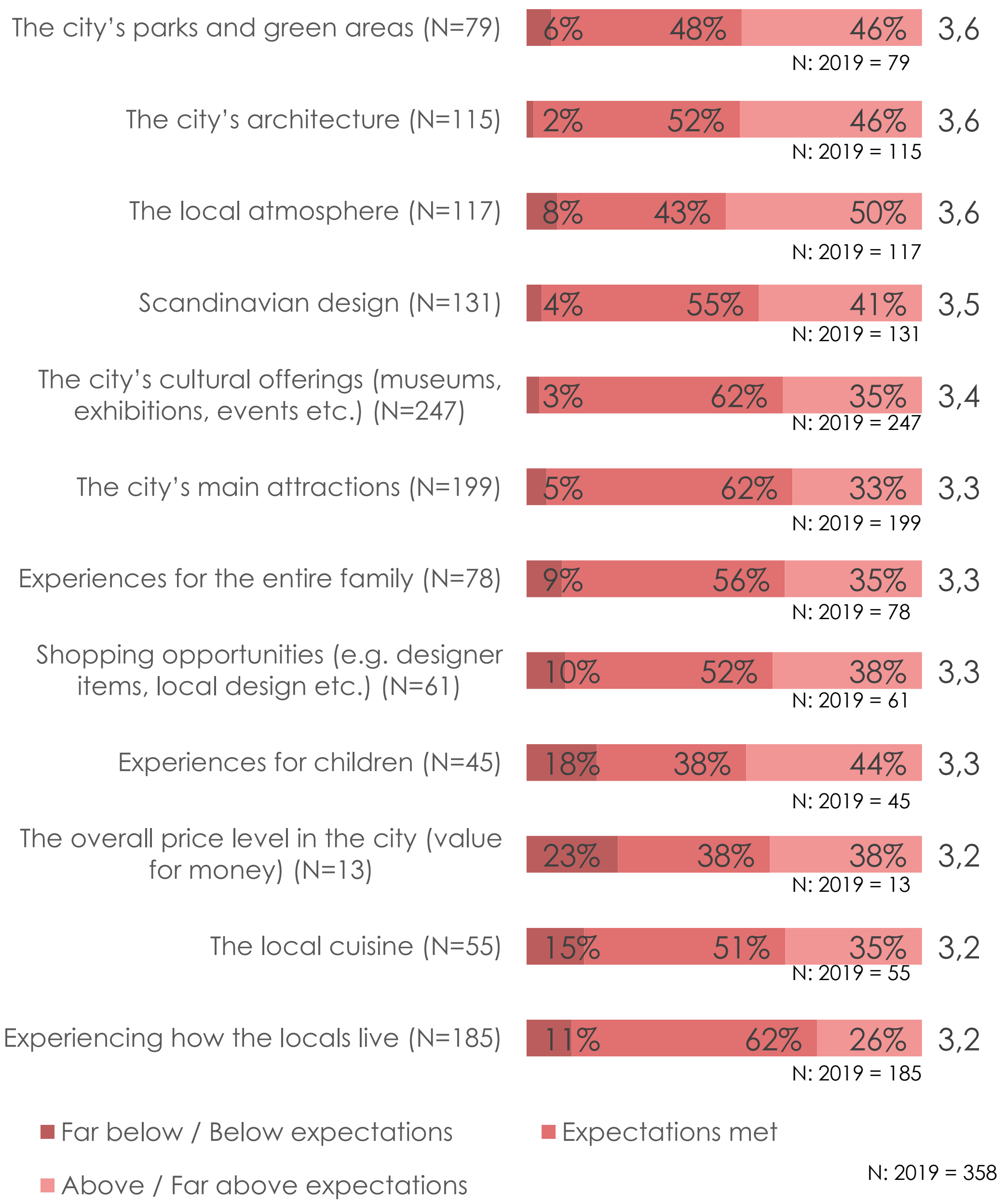
EXPECTATIONS

The respondents were also asked as to what extent different aspects of their Copenhagen visit met their expectations.

Overall, expectations were met with many of the experiences rated as 'above expectations'. This applied particularly to the categories 'The city's parks and green areas', 'The city's architecture', and 'The local atmosphere'.

Another noticeable result is that the category 'Experiencing how the locals live' has a relatively low value. This is due to a high percentage of respondent answering that expectations was met(62%) and not the parameter with most answering below expectation. This could also be a reflection of the respondents having very high expectations to what and how they are going to experience the life of the locals.

To what extent did your stay in Copenhagen meet your expectations for each of these aspects?



SPENDING FOR LEISURE TRAVELLERS

The average daily spending for Chinese leisure travellers is 2,647 DKK, approx. 400 DKK more than the average international city-break traveller in Copenhagen[4] and approx.100 DKK more than the average Asian city-break traveller in Copenhagen.[5]

The category where the respondents spent the most was "Jewellery, watches, handbags etc". This category accounts for 27% of the total daily expenditure despite the fact that only 1 out of 3 spent money on these items.

If the "jewellery, watches, handbags etc." category is removed from the calculations, the average daily expenditure is reduced to 1,930 DKK.

'Accommodation' makes up the second highest share of the daily expenditure (24%) followed by purchase of 'clothing and shoes' (13%), and dining at 'restaurants and cafés (11%).

Public transportation	2%	51 DKK
Other expenses	3%	73 DKK
Sightseeing and tours	4%	98 DKK
Car rental and fuel	4%	118 DKK
Activities and attractions	6%	151 DKK
Food drink and tobacco	7%	173 DKK
Restaurants cafes	11%	288 DKK
Clothing and Shoes	13%	346 DKK
Accommodation	24%	632 DKK
Jewelry, watches, handbags etc.	27%	716 DKK

N: 2019 = 283

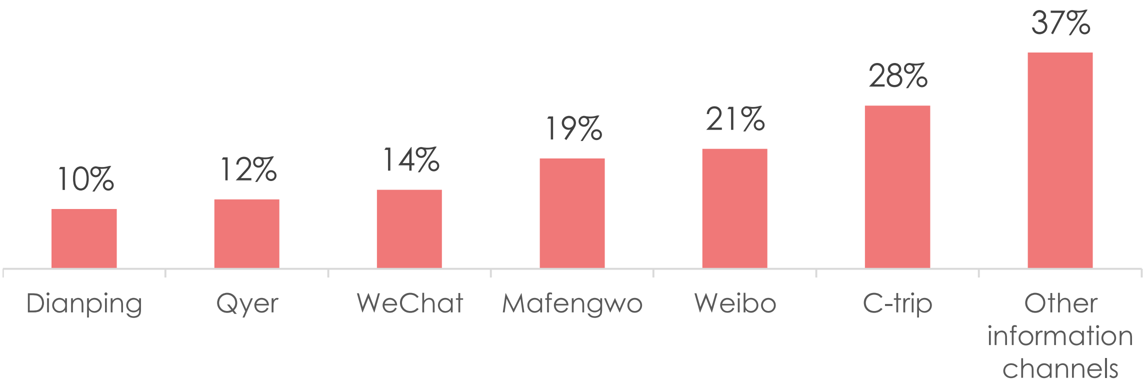
4. Visit Denmark, 2018 *Storbyturister I København*
5. Visit Denmark, 2018 Turisternes Døgnforbrug

COPENHAGEN AIRPORT

When asked whether they searched for information about Copenhagen airport before arrival, 60% of the respondents stated that they did search for information prior to their visit. In terms of information channels, 28% used Ctrip, 21% used Weibo and 37% used other information channels. Although they did not state which other information channels they used, it is likely that they used the Copenhagen Airport website.

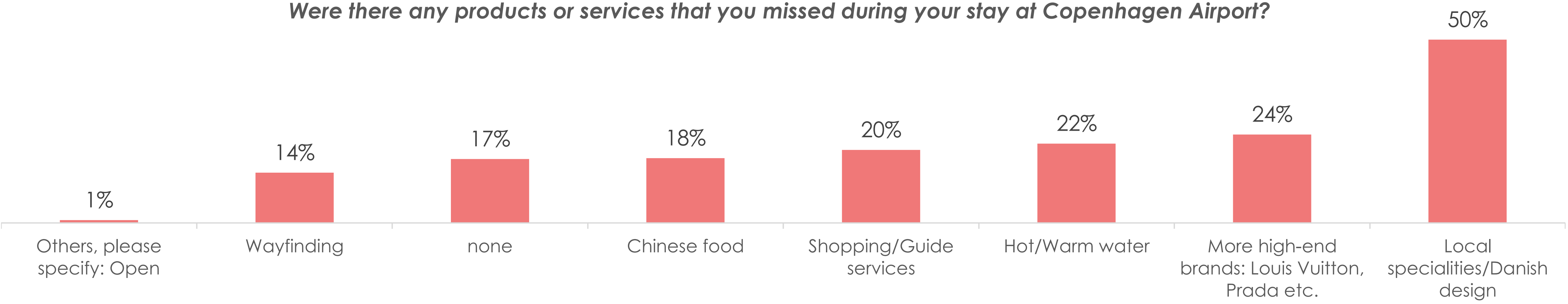
When asked if they thought any products or services were missing at the airport, they particularly mentioned 'local specialties and Danish design'. While 24% wanted 'more luxury and high-end brands like Louis Vuitton and Prada', 17% did not miss anything at the airport.

Where have you searched for information about Copenhagen Airport?



N: 2019 = 241*

Were there any products or services that you missed during your stay at Copenhagen Airport?



N: 2019 = 404*

AFTER THE VISIT

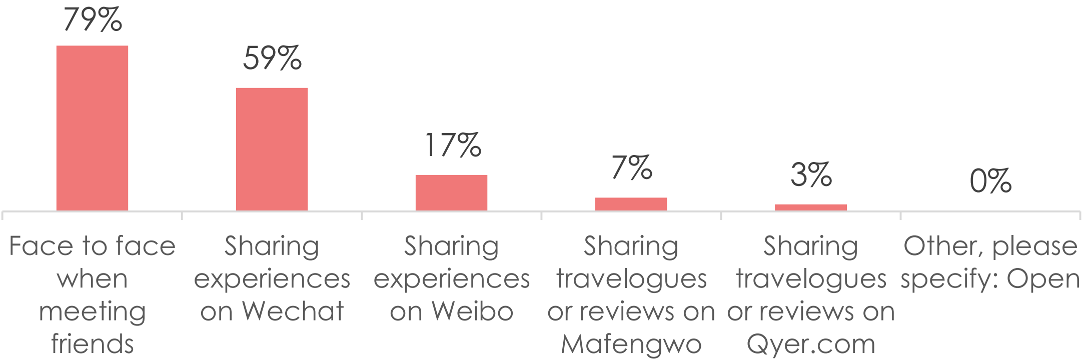
SATISFACTION WITH COPENHAGEN

Overall the Chinese visitors are very satisfied with their stay in Copenhagen. Thus, 89% state that they are either satisfied or very satisfied with their visit. This is true for all age groups.

When asked how likely it is that they will recommend Copenhagen as a travel destination, 35% answered ‘very likely’. This is a small increase from the 2018 study (29%). This percentage is equivalent to an NPS score (a measure for the respondents’ willingness to recommend the city) of 8. In 2018 this number was 9 for Chinese visitors and 37 for other international visitors. This implies that Chinese visitors tend to be less satisfied with their visit to Copenhagen than other international travellers.

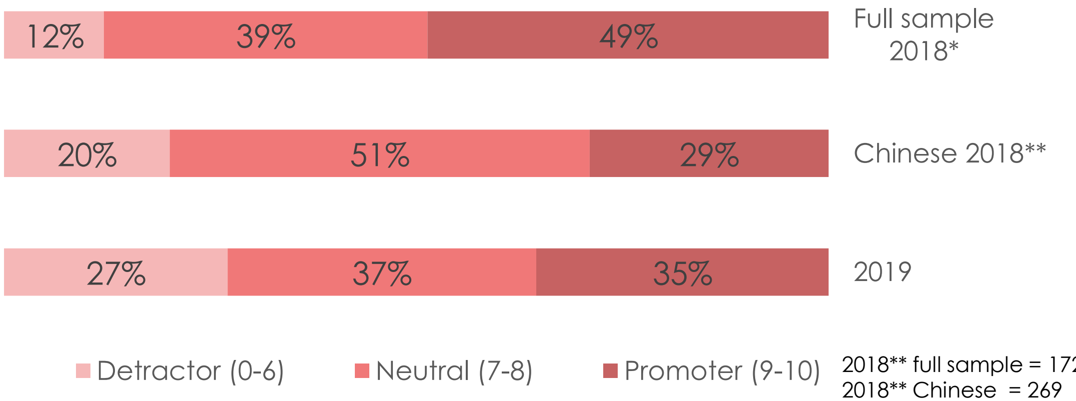
For the travellers who will recommend Copenhagen to others, ‘word of mouth’ is the preferred method stated by 79% of the respondents and 59% will share their experience and recommend Copenhagen using the Chinese social media platform WeChat.

How would you recommend Copenhagen?



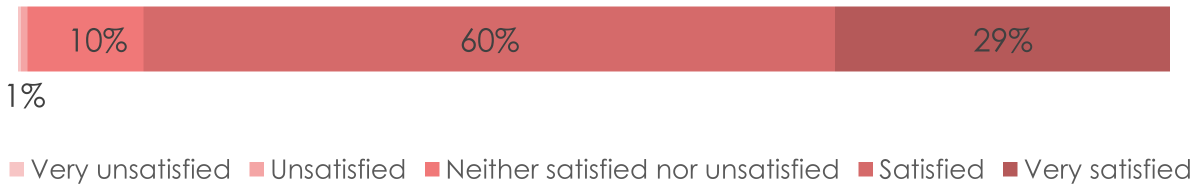
N: 2019 = 260

On a scale from 0-10, how likely is it that you will recommend Copenhagen as a travel destination to friends/family?



2018** full sample = 1721
2018** Chinese = 269
2019 = 358

How satisfied are you with your stay in Copenhagen?



N: 2019 = 404*

**Source: 10x Study: Københavns DNA og Fremtidige potentialer.

THANK YOU

WRITE ME AT MBF@WOCO.DK