

Netnographic study on Chinese travelers to Copenhagen and Stockholm

November 6, 2019

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Kairos (καιρός)
is an ancient Greek word meaning
the right and opportune moment.



Methodology

- 70,000+ images and 100,000+ posts, shared by Chinese travelers to the focus destinations, were downloaded from Chinese social media channels
- Data sources include Ctrip, Mafengwo, Qunar, Qyer (Qiongyou), Sina Weibo, Wechat official accounts, and Xiaohongshu.
- Copenhagen and Stockholm were the key foci of the study; Amsterdam and Helsinki were used as reference points
- Machine learning-based document and image landscaping were used to identify themes and topics in the material
- Identified topics and themes were studied in-depth by two researchers



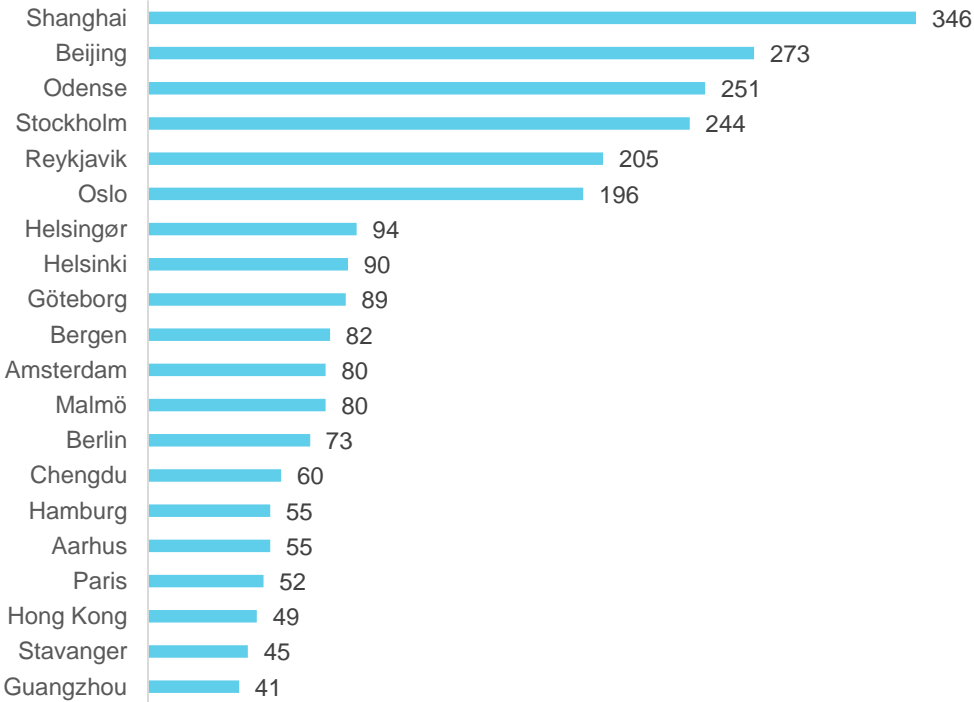
How do Copenhagen and Stockholm fit into Chinese travel itineraries?

Based on an analysis of 6309 travel itineraries shared by Chinese travelers online

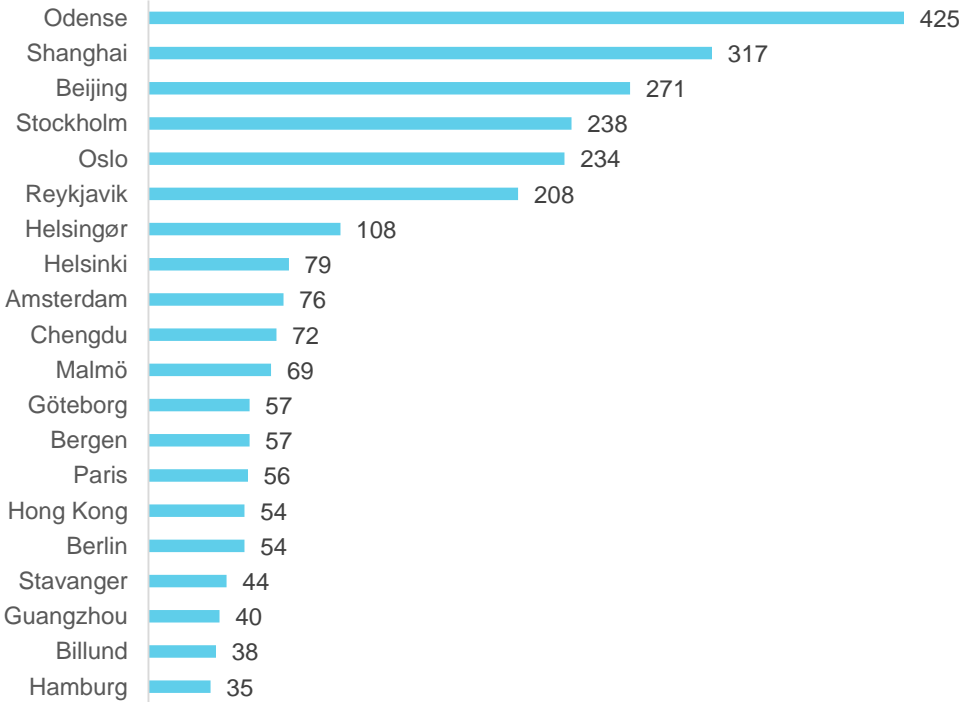


Copenhagen: departure and arrival cities

Departure cities for Copenhagen

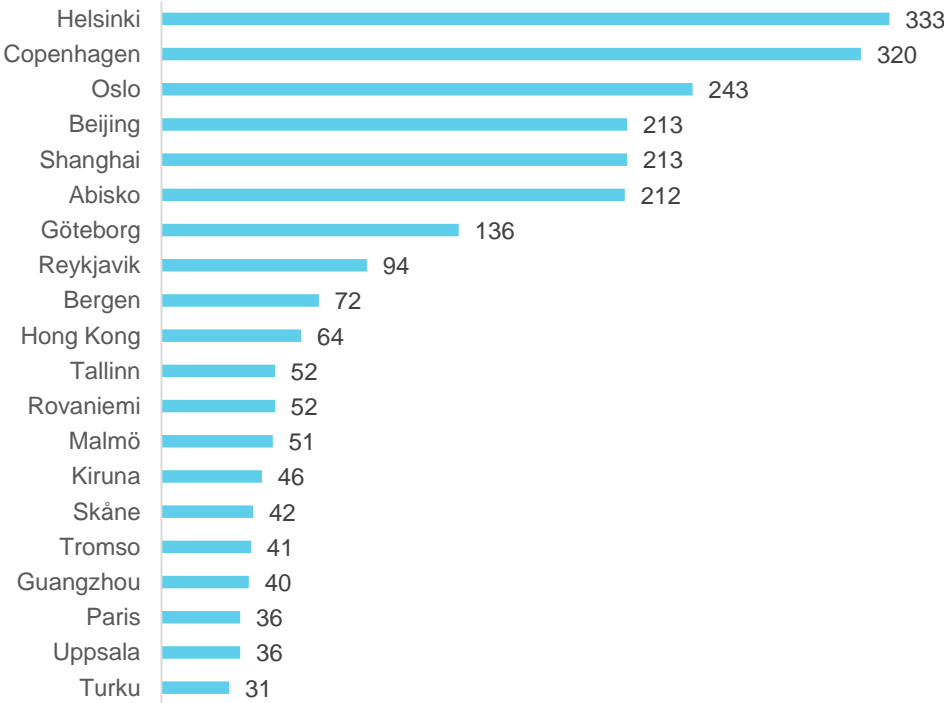


Arrival cities from Copenhagen

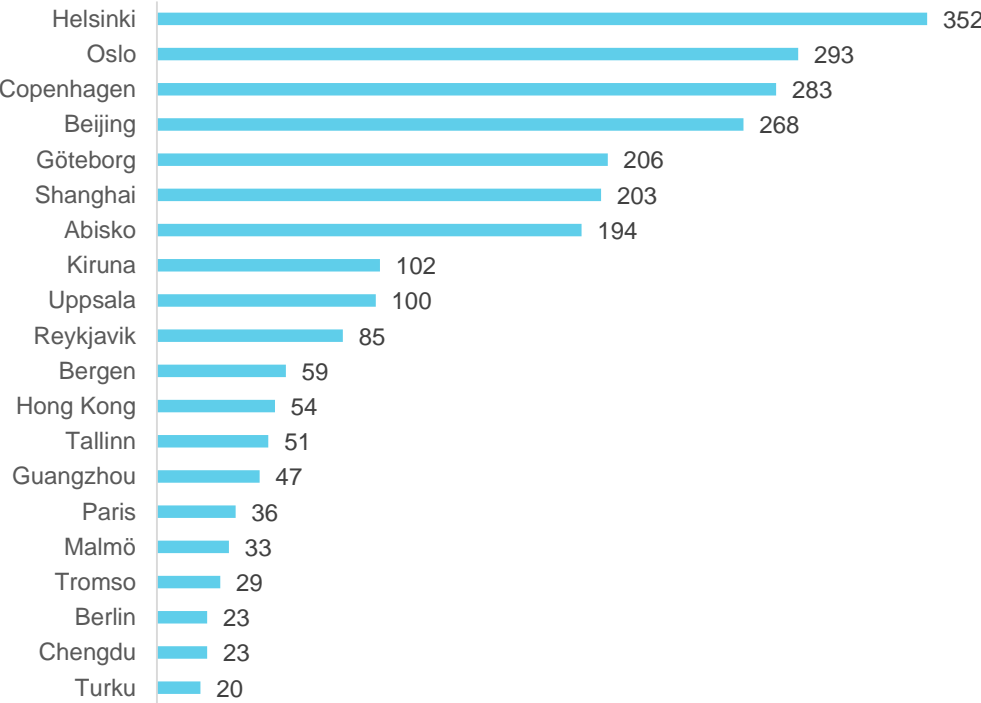


Stockholm: departure and arrival cities

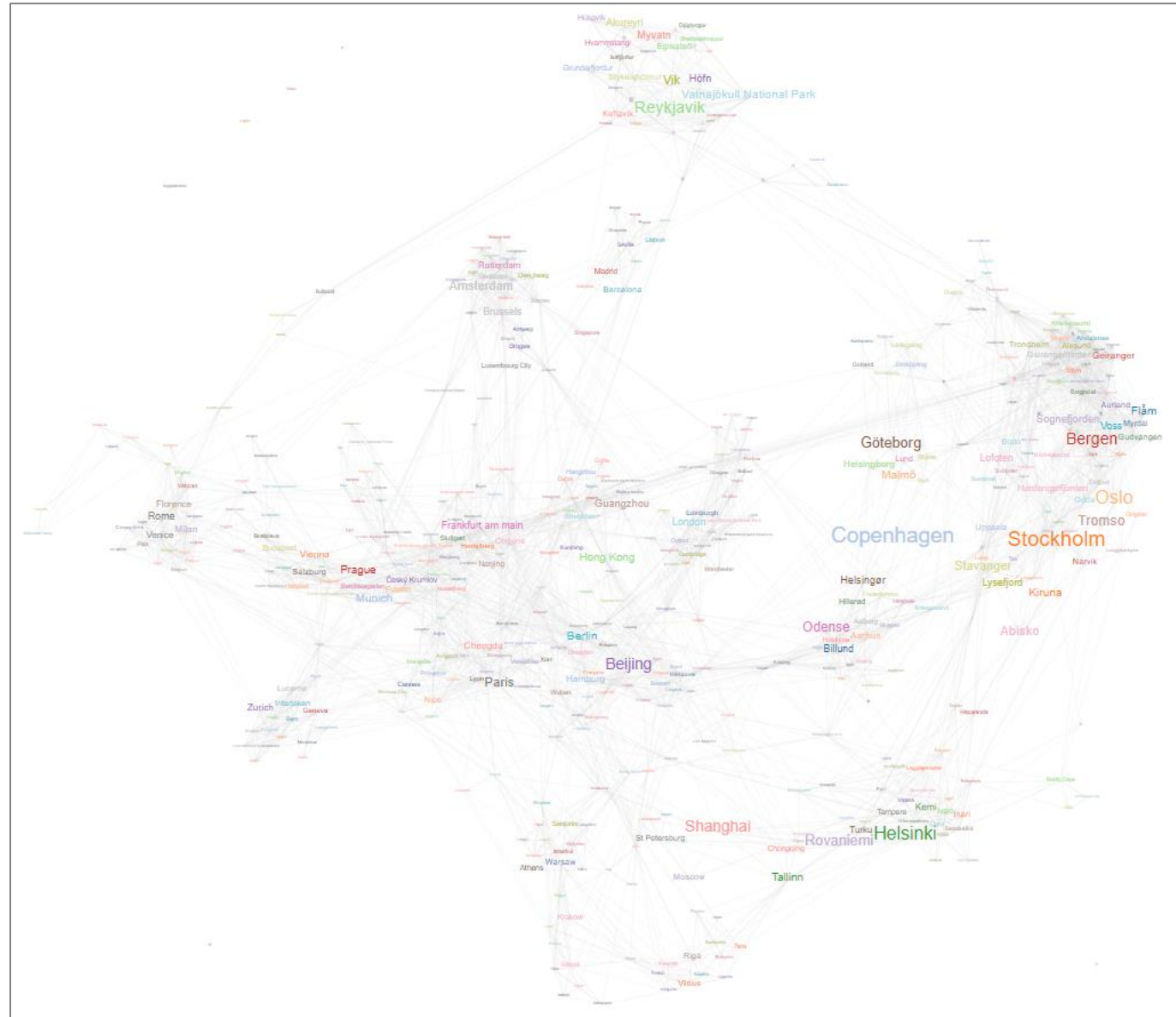
Departure cities for Stockholm

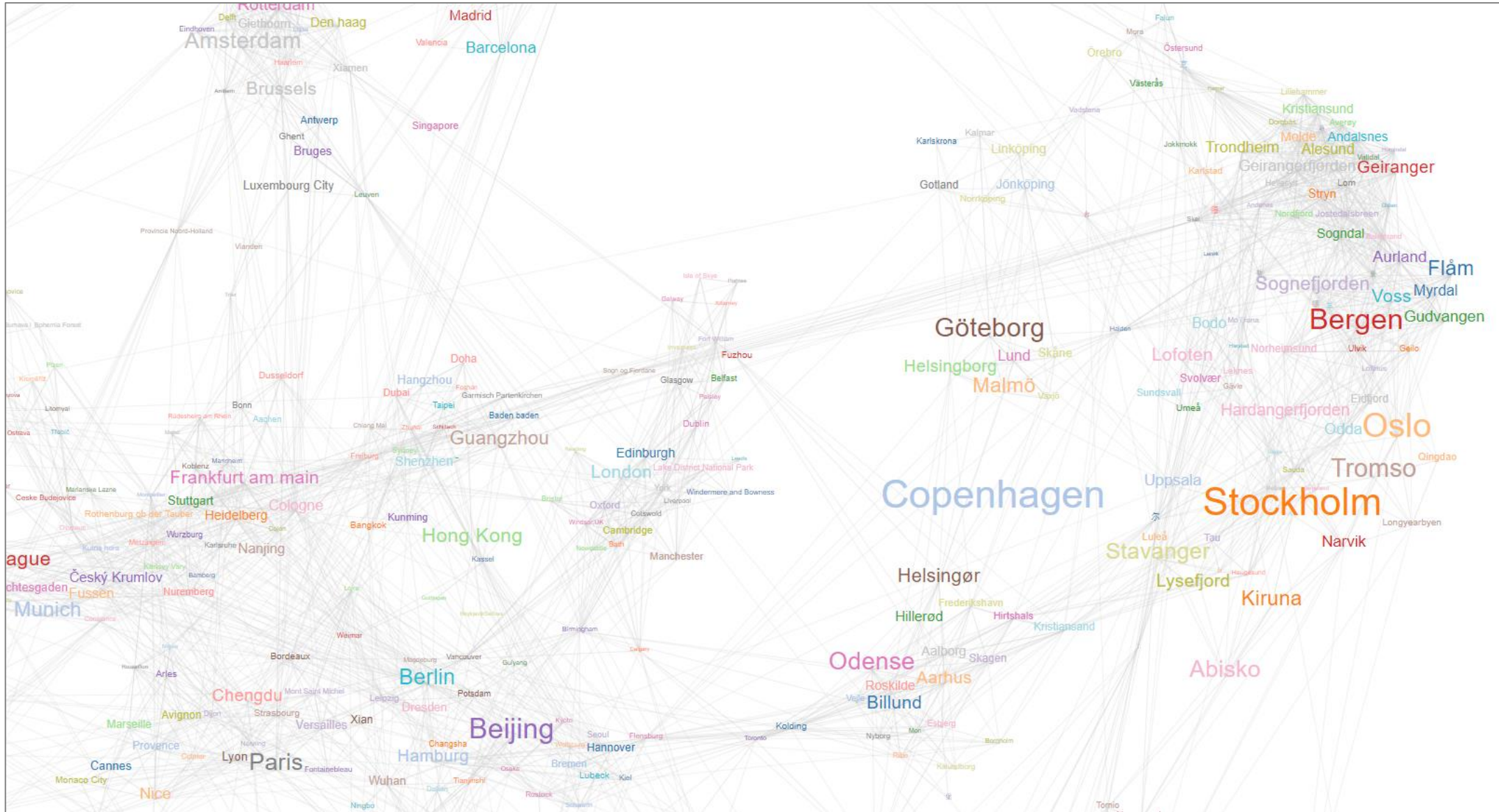


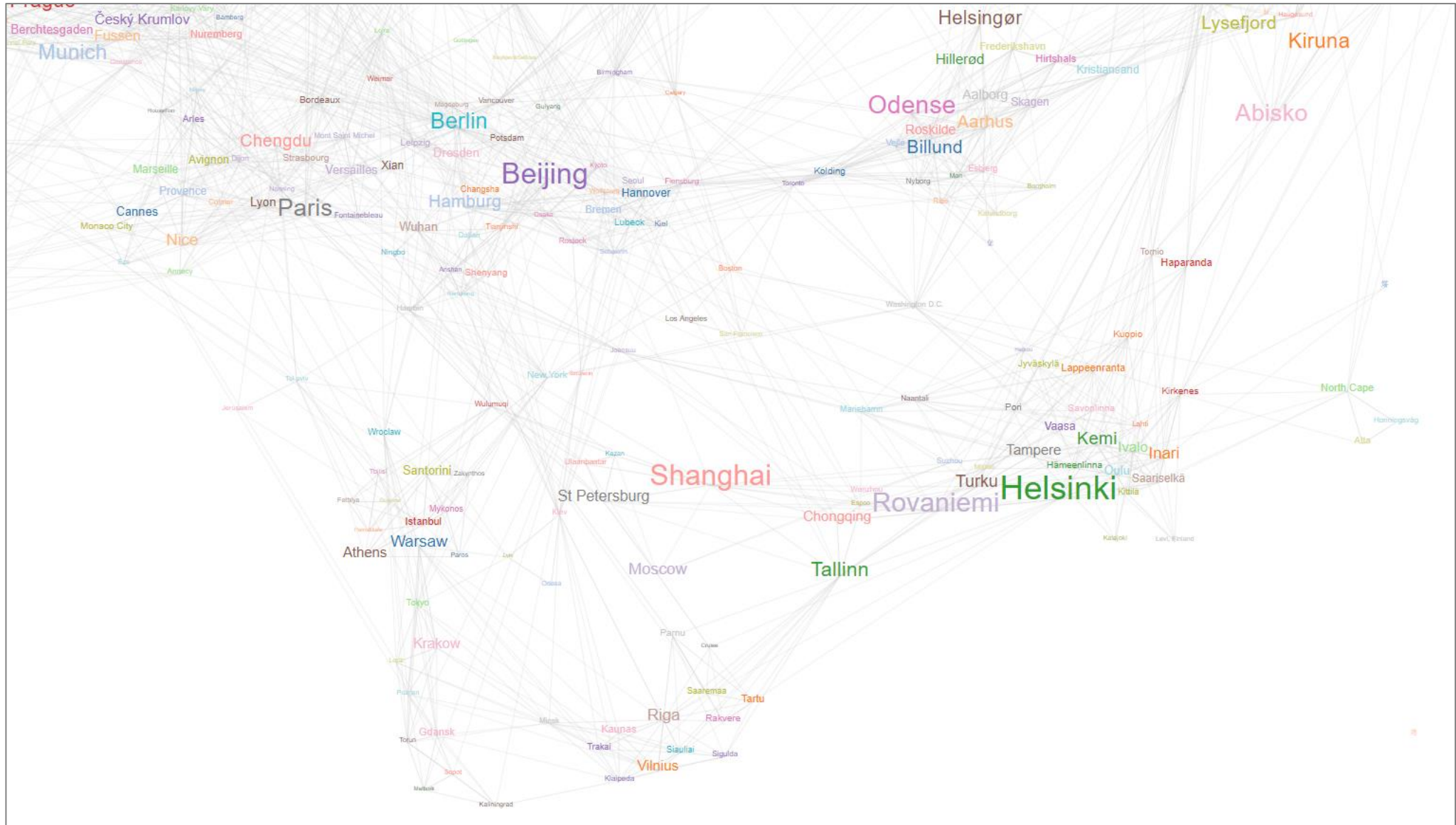
Arrival cities from Stockholm

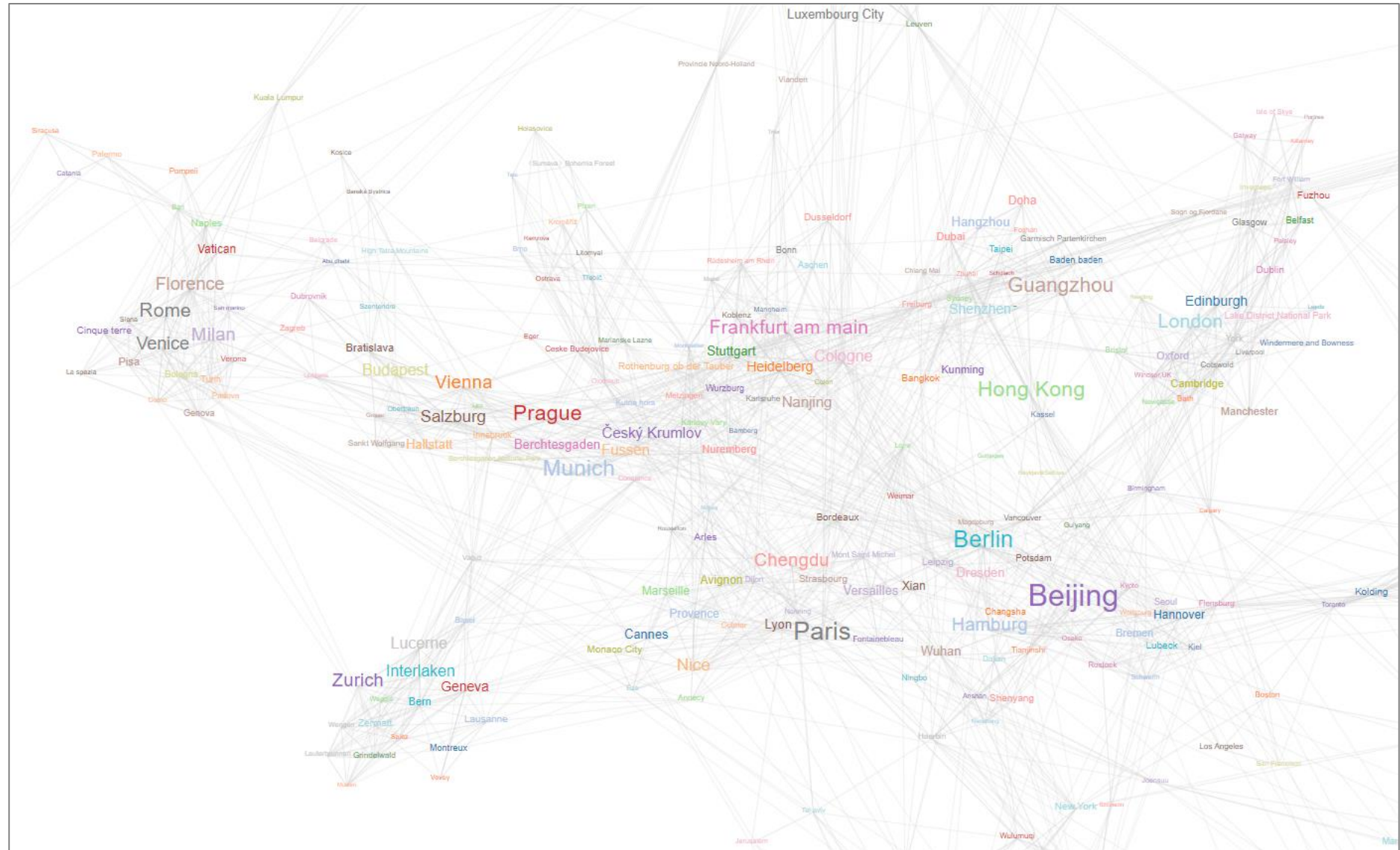


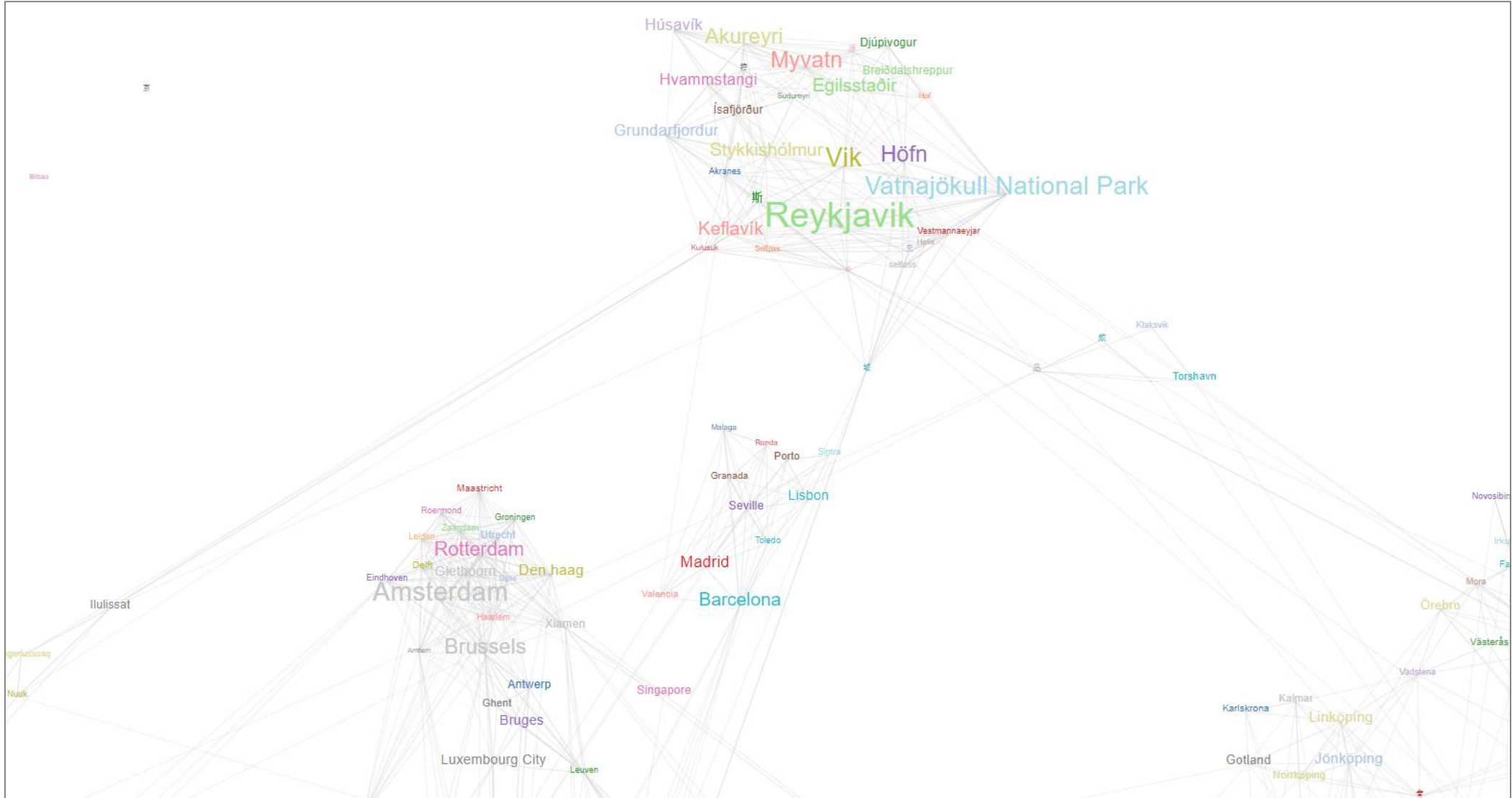
Itineraries that contain Copenhagen and/or Stockholm











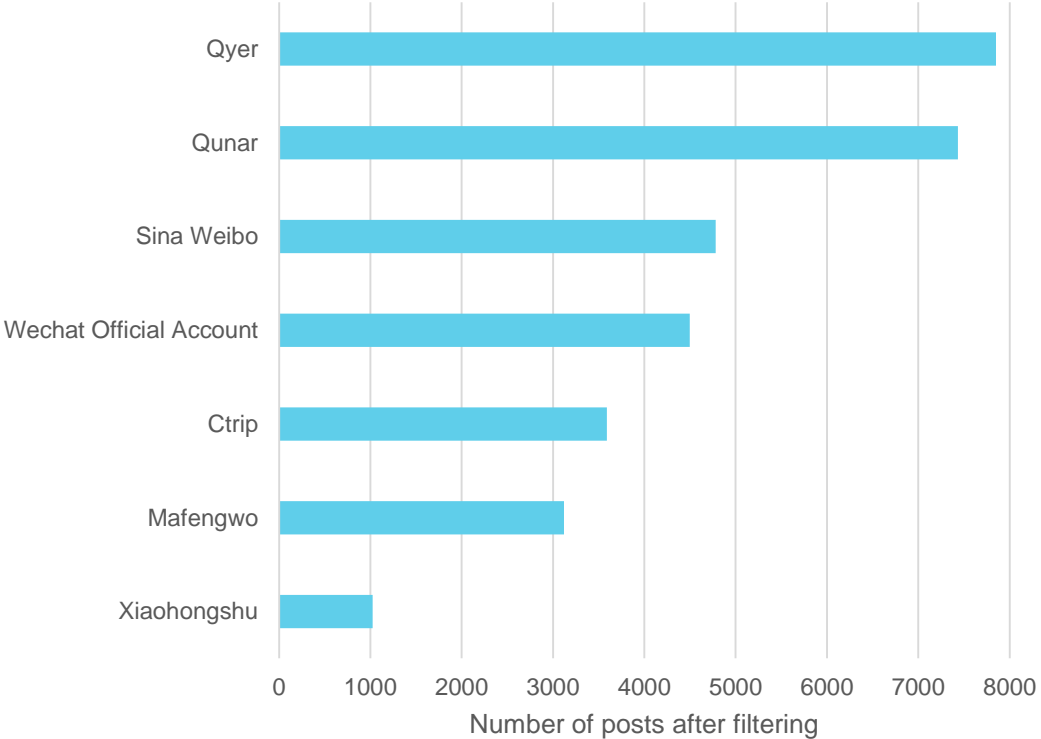
What do Chinese travelers convey from their trips to Copenhagen and Stockholm?

Based on an analysis of 100,000+ posts and 70,000+ images shared by Chinese travelers online

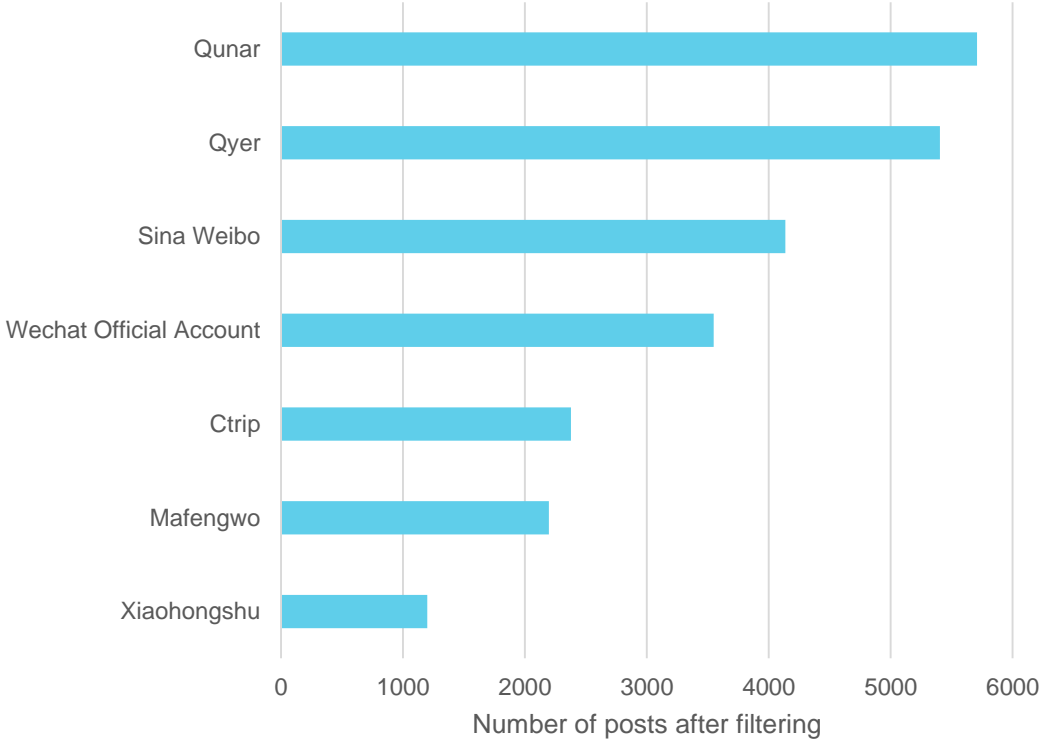


Summary of posts from relevant travel sources

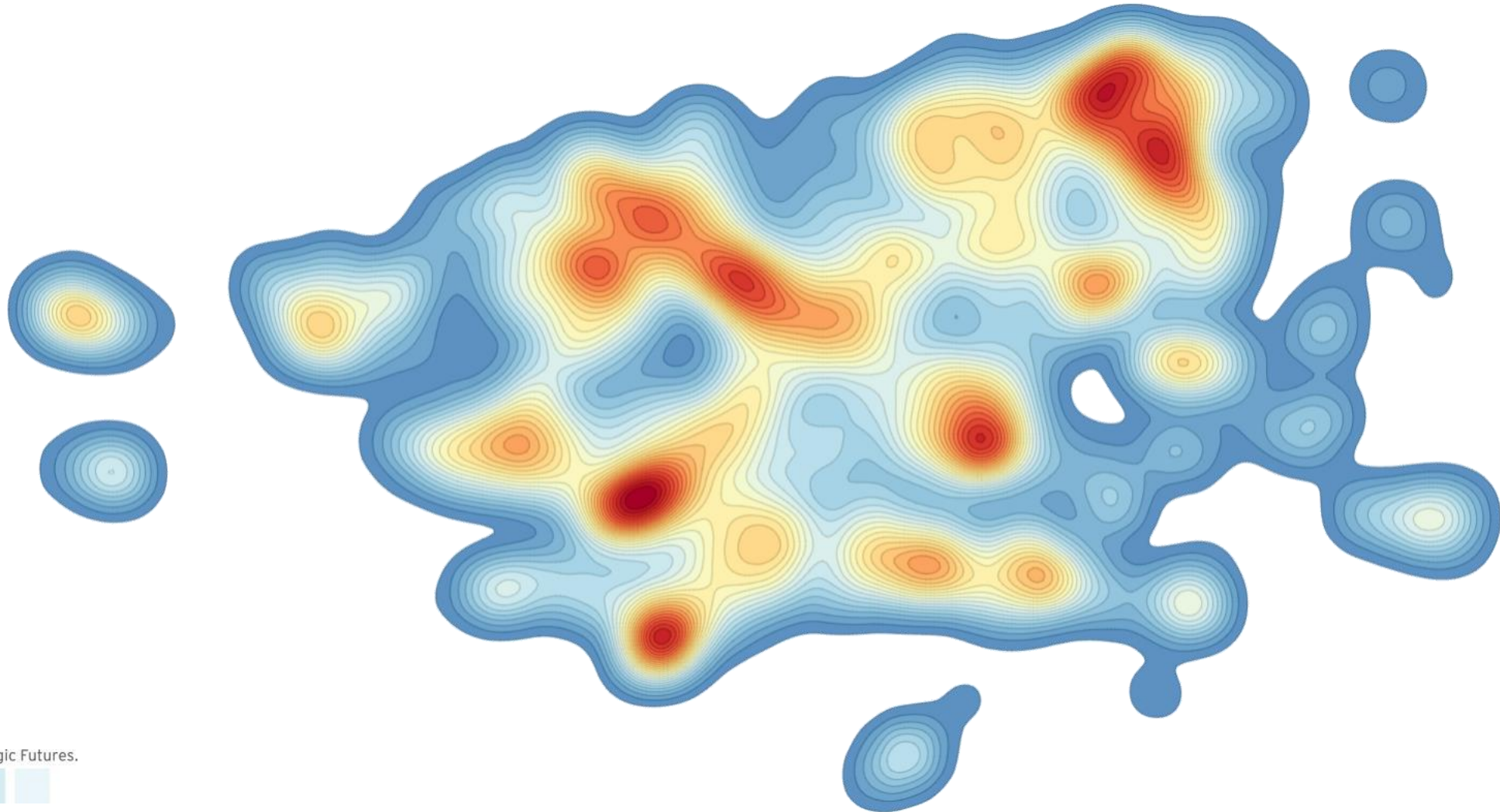
Copenhagen



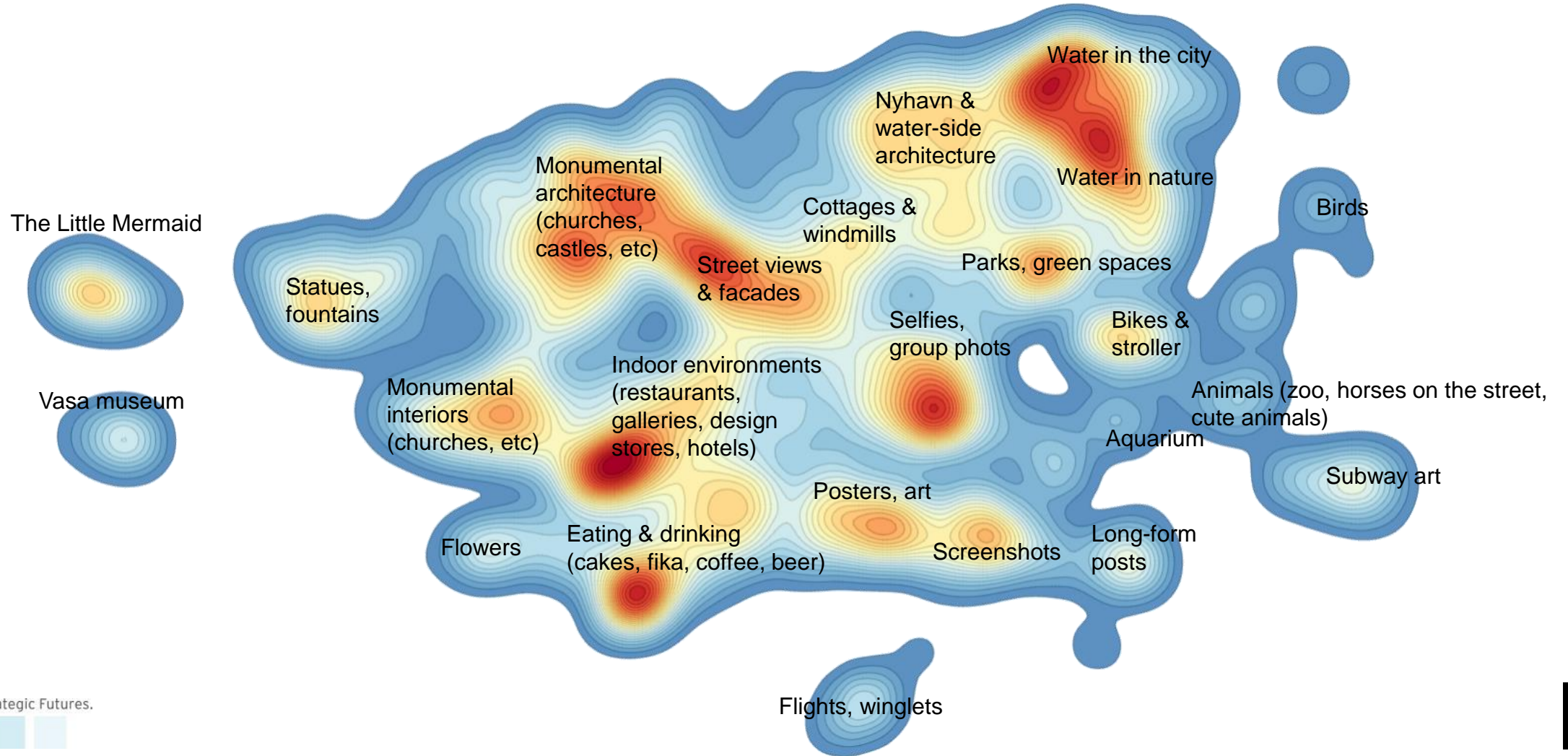
Stockholm



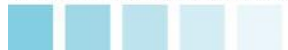
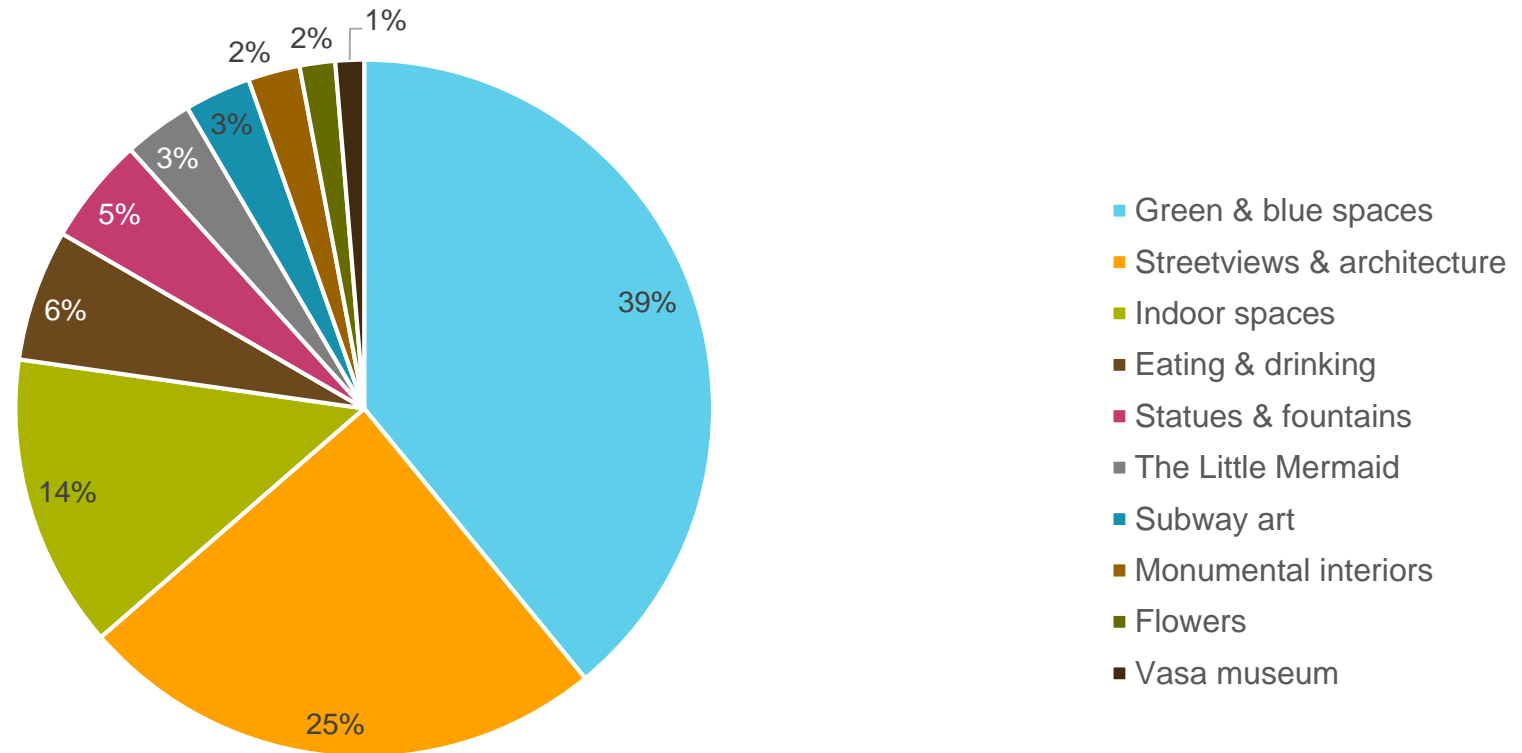
The landscape of motives in photos shared by Chinese travelers



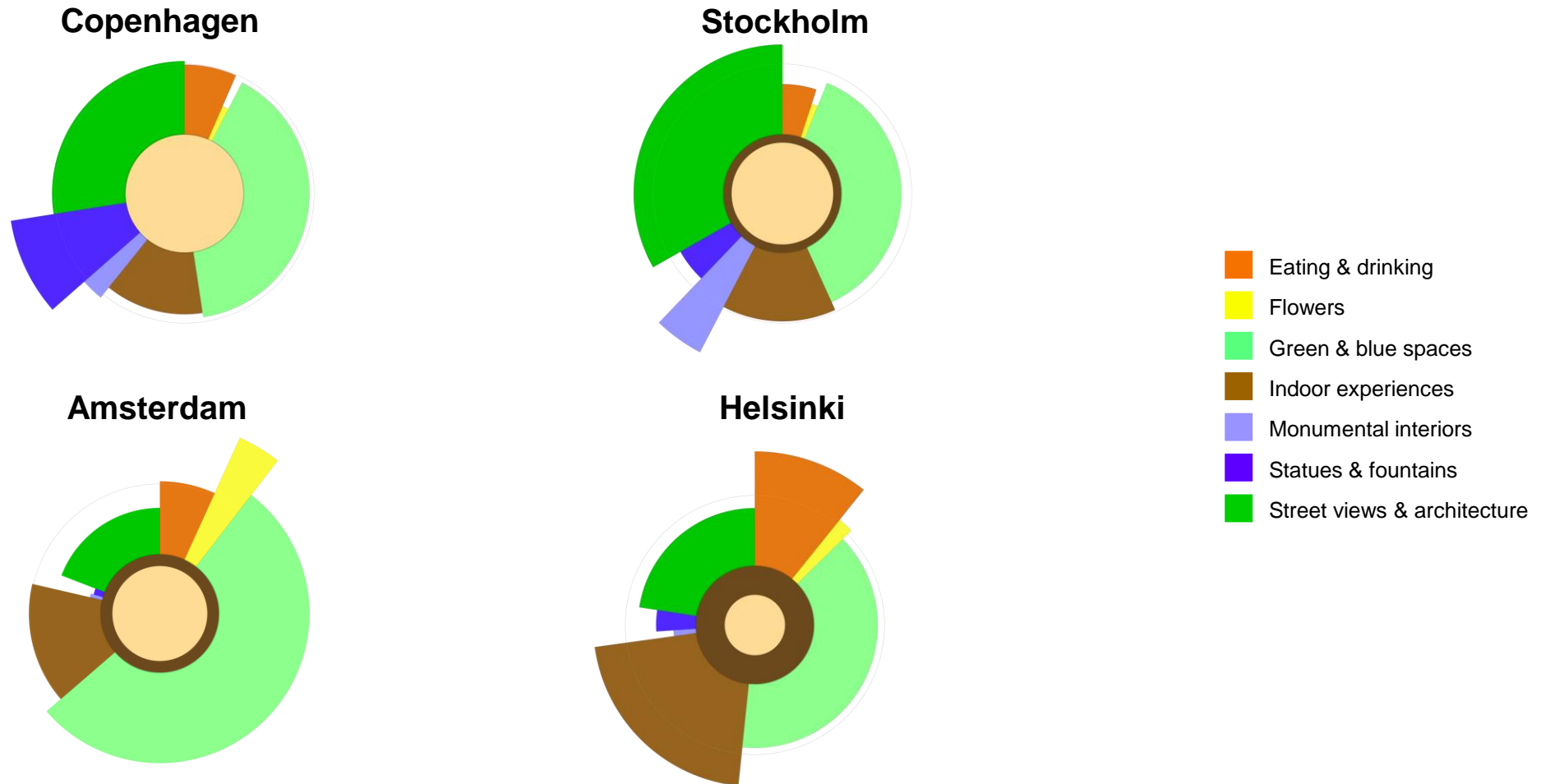
The landscape of motives in photos shared by Chinese travelers



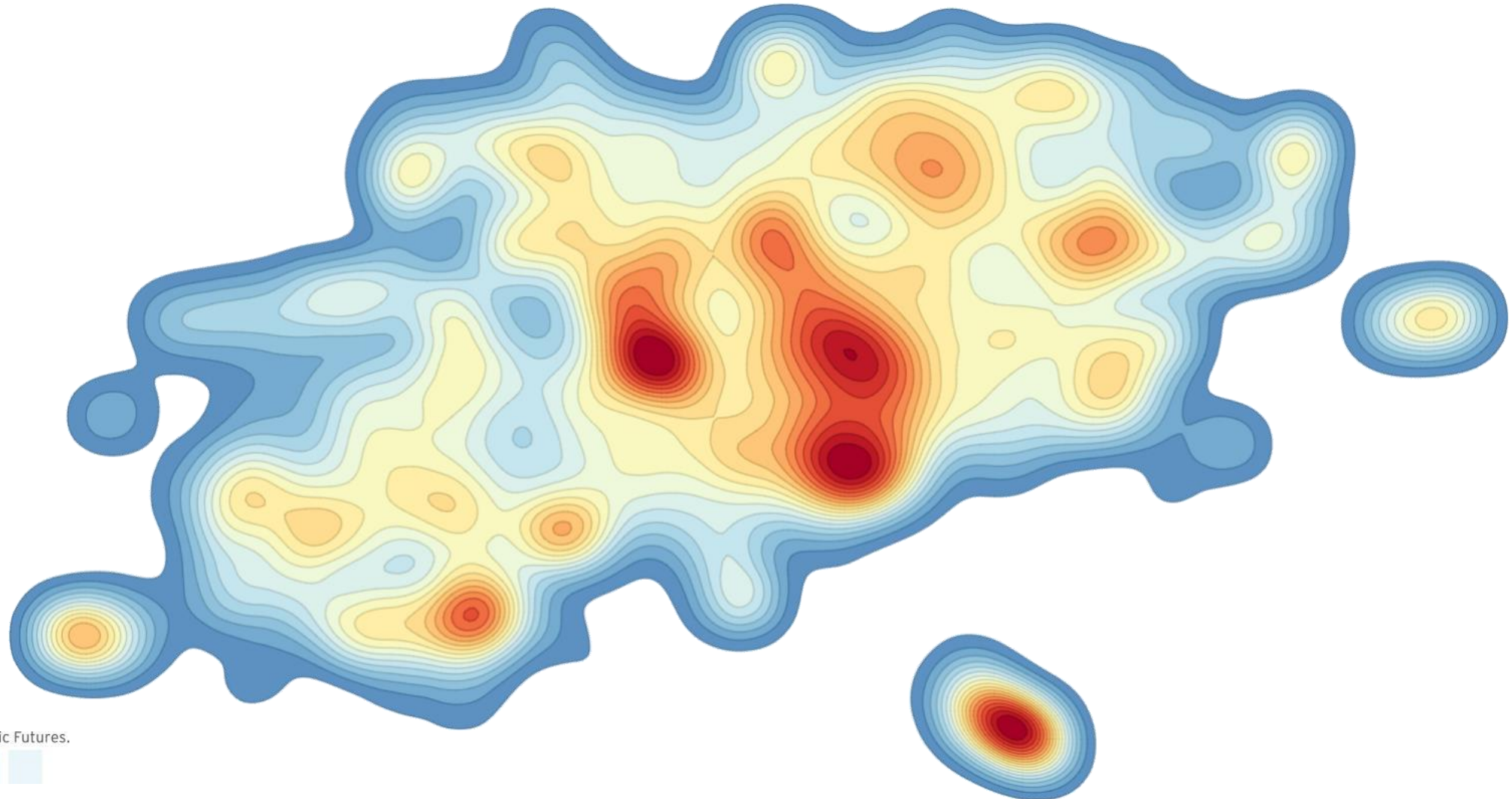
Key motives in images shared by Chinese travelers



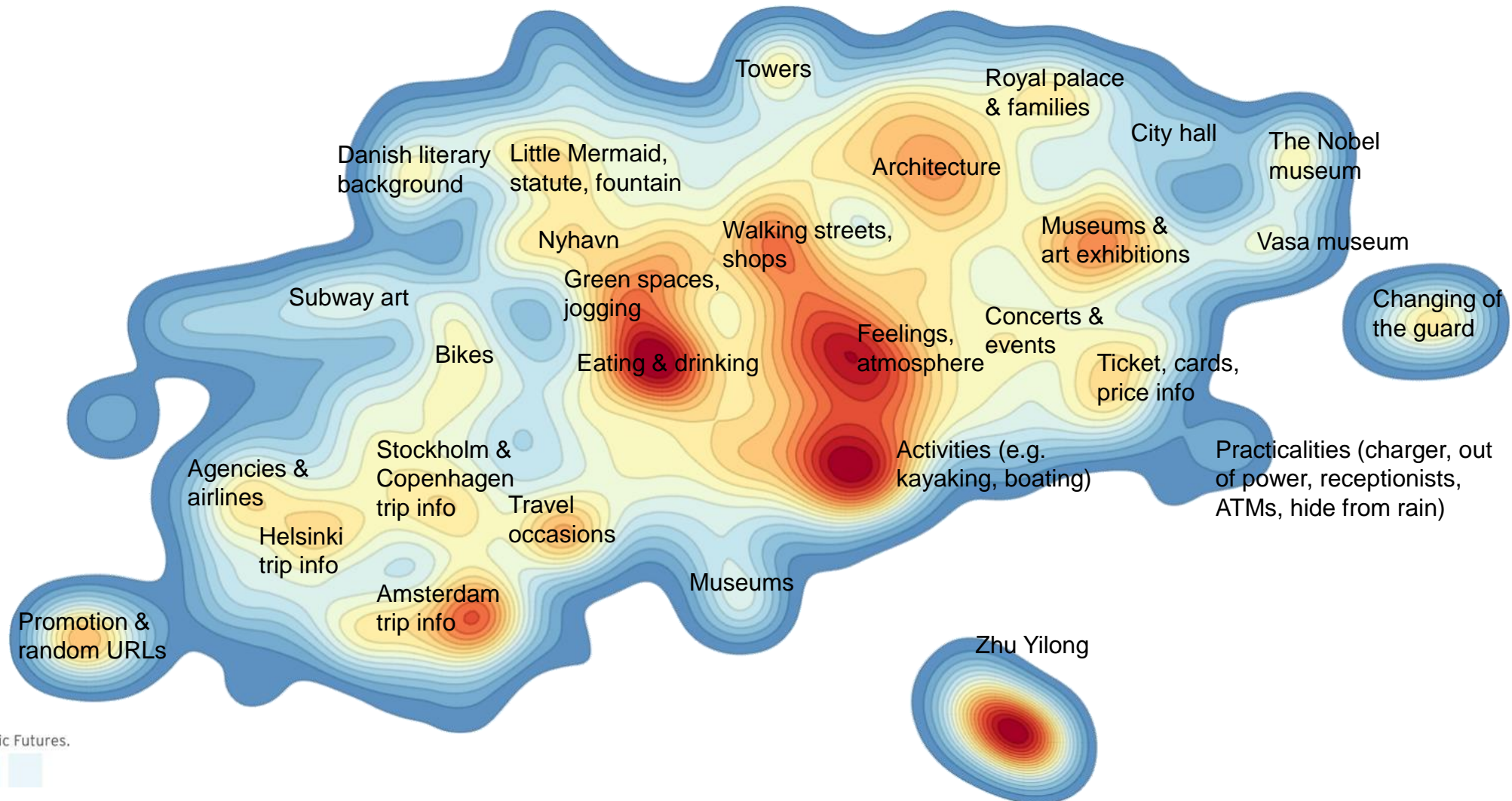
Key image motives by destination



The landscape of topics in posts by Chinese travelers

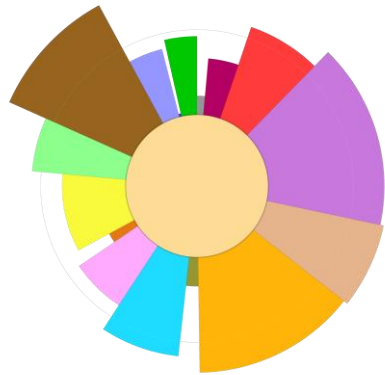


The landscape of topics in posts by Chinese travelers

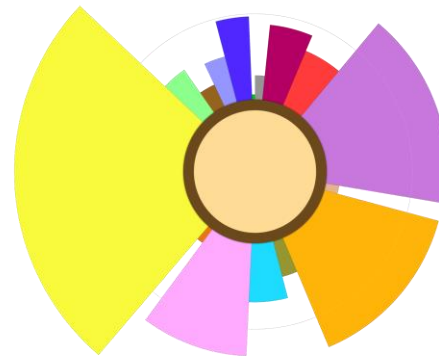


Key discussion topics by city

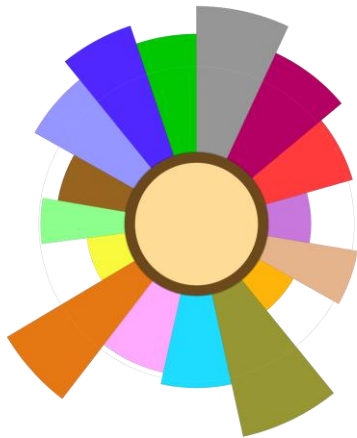
Copenhagen



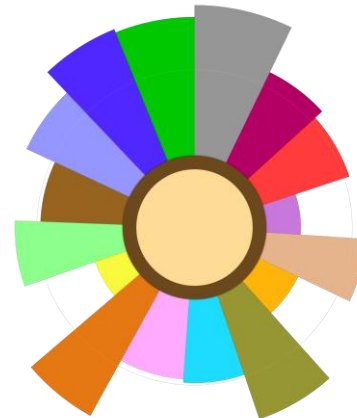
Stockholm



Amsterdam



Helsinki



- Activities
- Art
- Attractions
- Architecture
- Castle
- Church
- Culture
- Design
- History
- Hotel
- Museum
- Palace
- Park
- Restaurant
- Subway
- Walking street



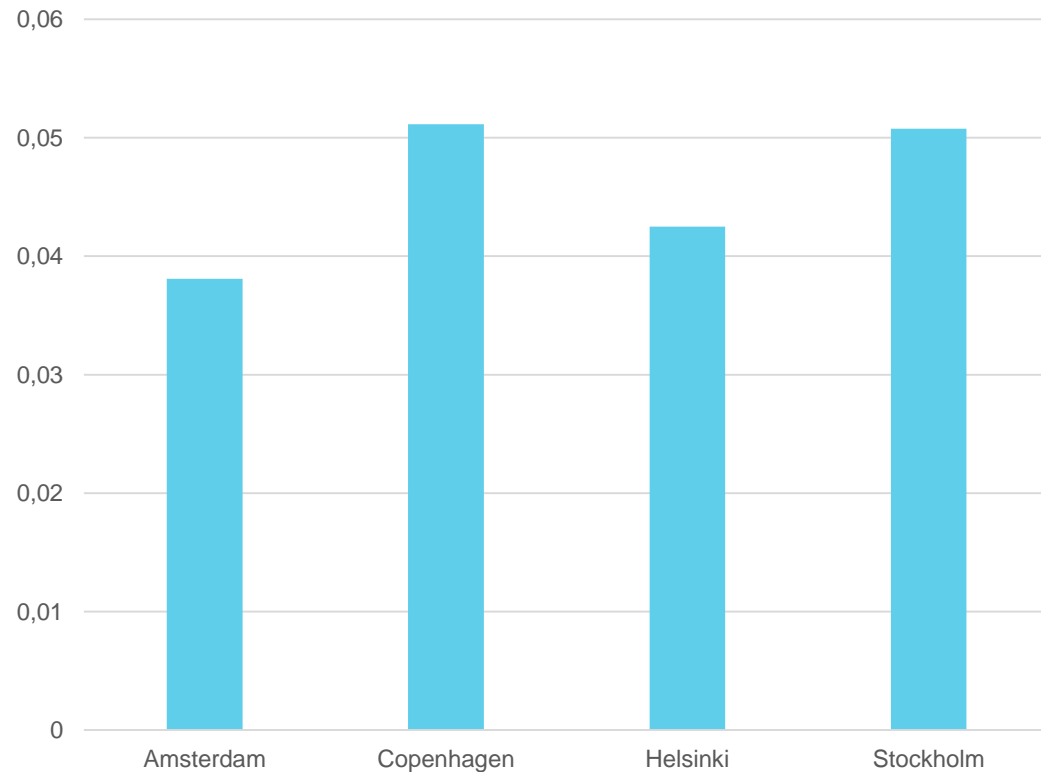
How do travelers feel about the different destinations and attractions?

Sentiment analysis of the discussions about the destinations



Traveler sentiment toward the destinations

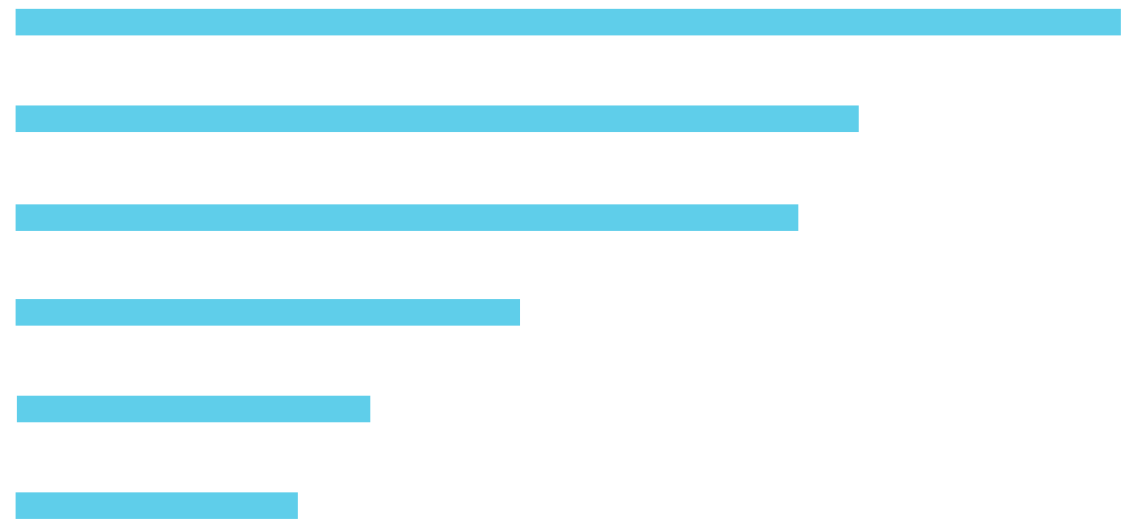
Average sentiment score by destination



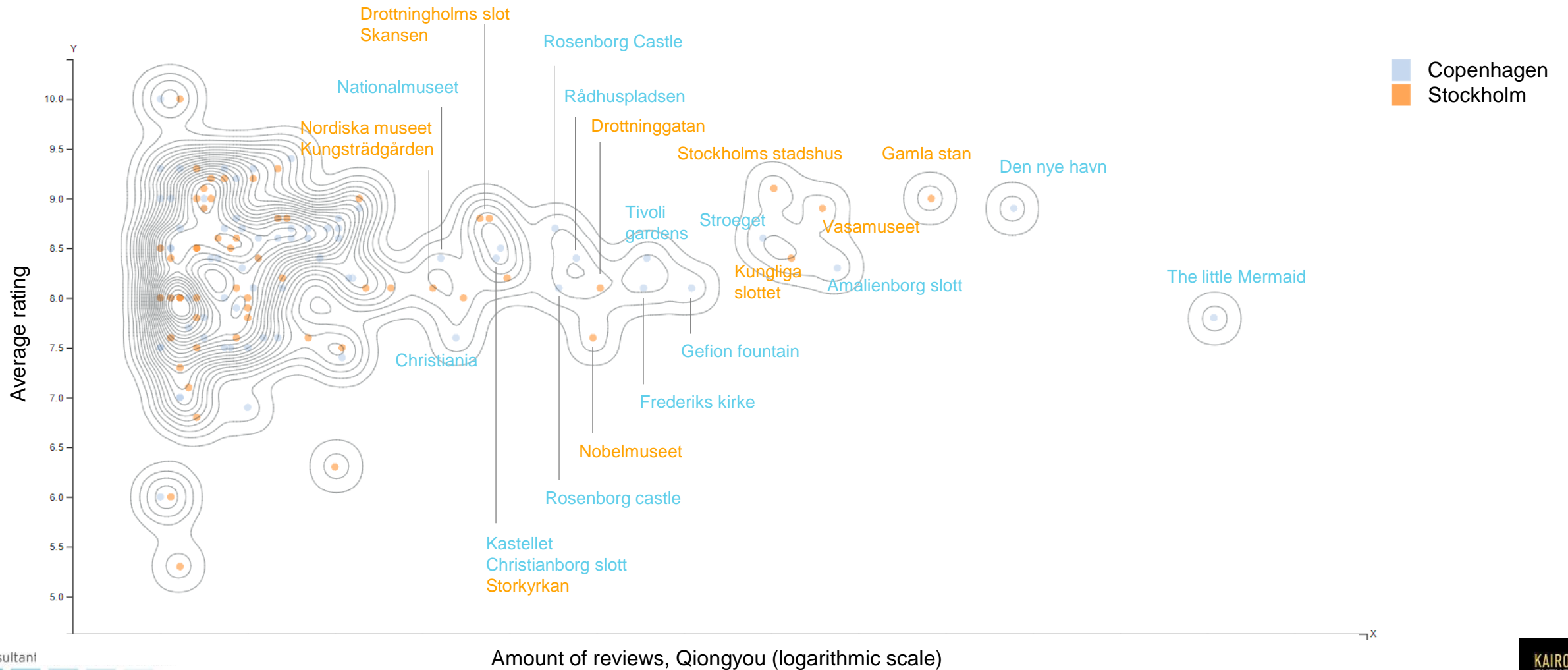
- Most posts are neutral
- Copenhagen and Stockholm on the same level
- Both cities higher than the reference destinations

Key complaints

1. The little mermaid is overrated
2. No Chinese audio guide
3. The attractions are too crowded
4. Tickets are too expensive
5. Boring attractions
6. Bad service

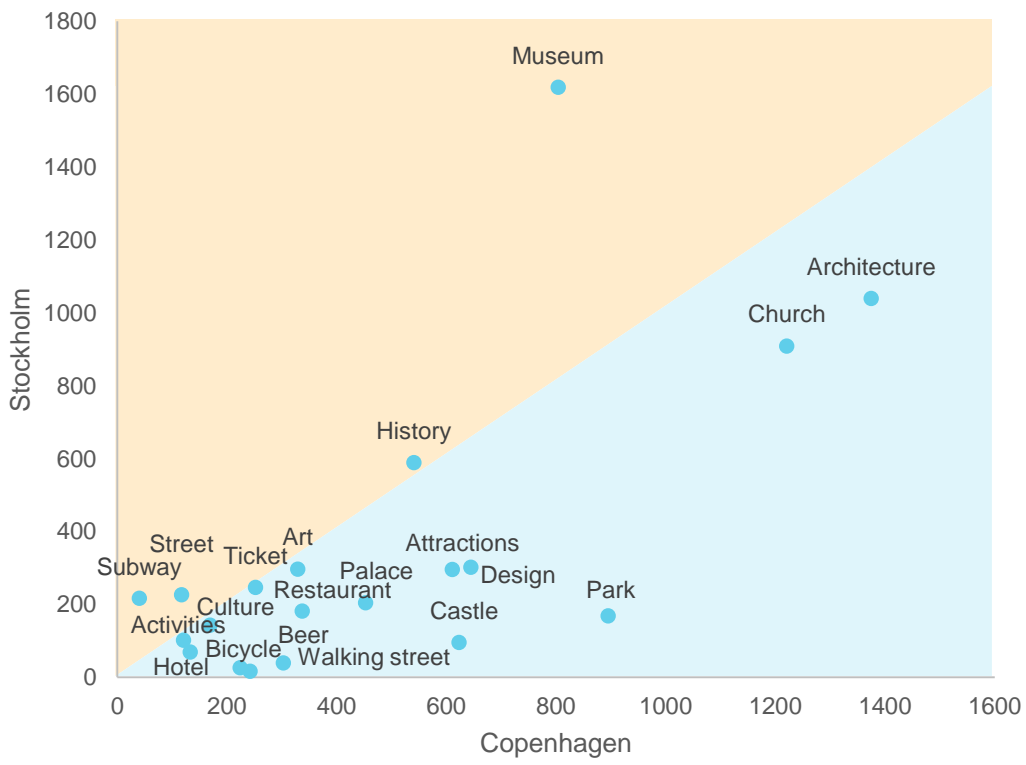


Top attractions reviewed by Chinese travellers

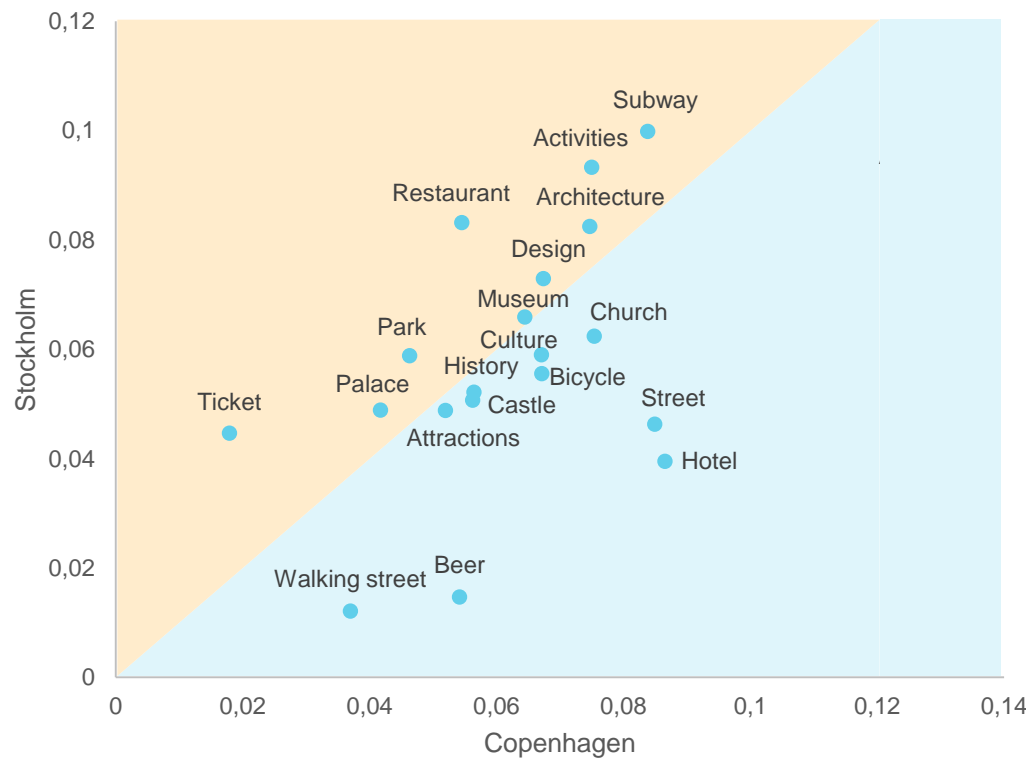


Key topics: Copenhagen vs. Stockholm

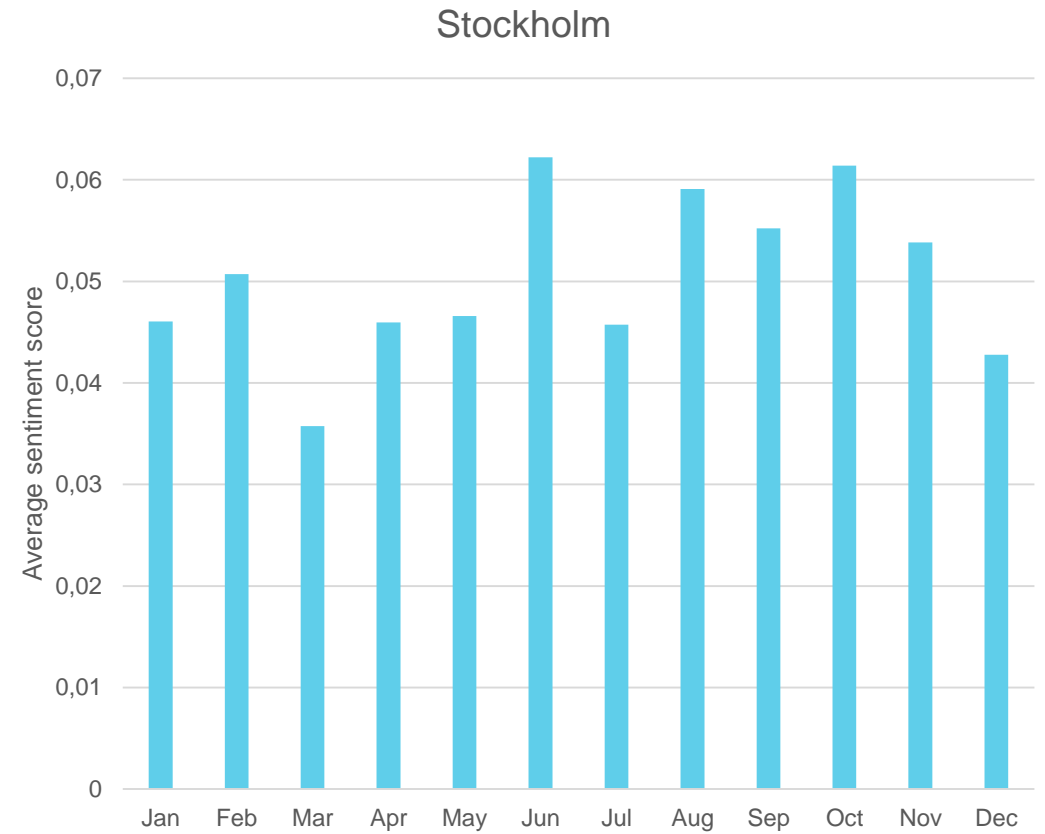
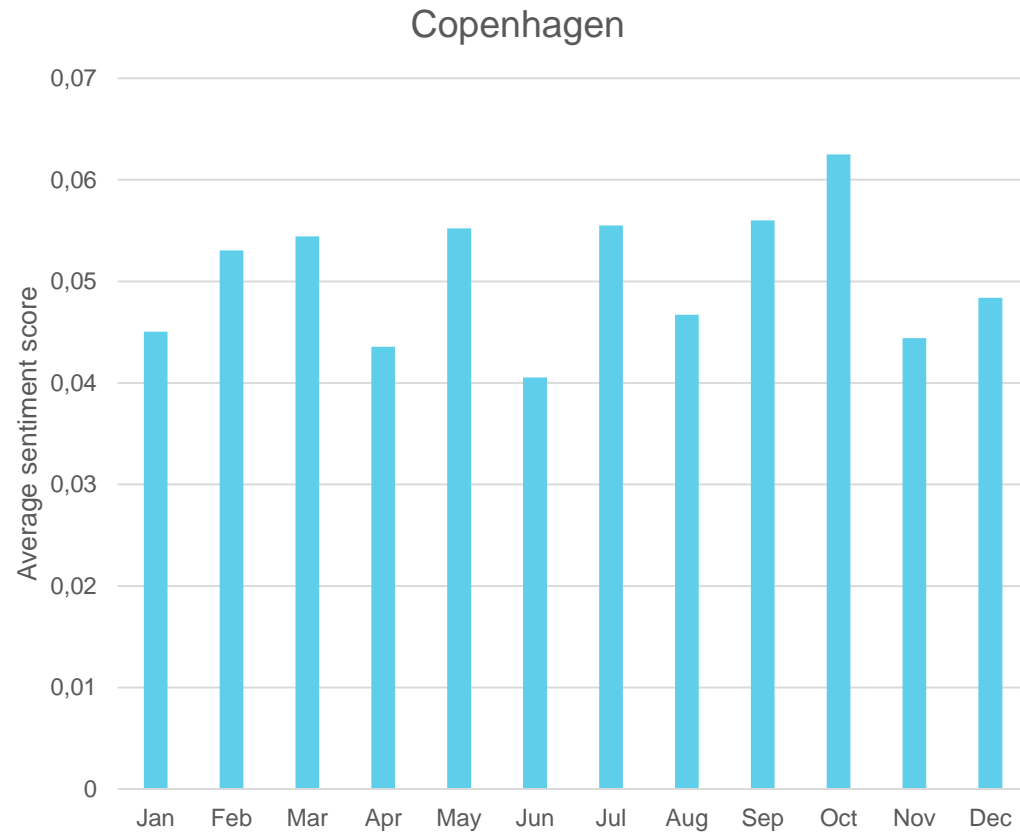
Discussion volume per topic and destination



Average sentiment score per topic and destination



No clear seasonal variation in traveler sentiment – but October is a good month



Similarities and complementarities between Copenhagen and Stockholm

Perspective 1: Content analysis – what topics are overrepresented among travelers to both destinations?

Travelers to both destinations put greater emphasis on transportation, convenience, scenery, romantic atmosphere, car rental, and architecture

Perspective 2: What are the similarities and differences revealed through the analysis (not limited to travelers to both places)?

Similarities identified:

- Water capitals with great outdoor activities
- Monumental architecture
- Interesting design elements
- Scandinavian style

Differences identified:

- Stronger focus on Copenhagen's literary heritage (reflected through its monuments)
- Stronger focus on Stockholm's historical heritage (reflected through its museums)

Perspective 3: Explicit comparisons (identified through qualitative reading of posts comparing the two destinations)

- In Stockholm, the city center offers great city views, museums, architecture, and water sceneries. In Copenhagen, by comparison, the attractions are more spread out, with suburban places of interest.
- Similar seasonal preferences apply to both destinations: travel during the late spring, summer, or early autumn to avoid cold and darkness.
- Local Scandinavian products should be purchased in Copenhagen, where prices are cheaper and many well-known design brands are available
- Both destinations are part of a Northern European itinerary. Copenhagen can easily be combined with other European destinations.

Conclusion:

- Both destinations tell the Scandinavian story from different perspectives.
- The continuity in the perception between the two destinations relates to design, atmosphere, water and outdoor spaces, and interesting architecture.
- The key differences between the destinations relate to travelers' focus on different kinds of attractions



Insights into topics and themes

Qualitative deep-dive into identified topics and themes



Themes identified for qualitative deep-dive

- Public art
- Attractions
- Feelings
- Lifestyle
- Food and drink



Public art



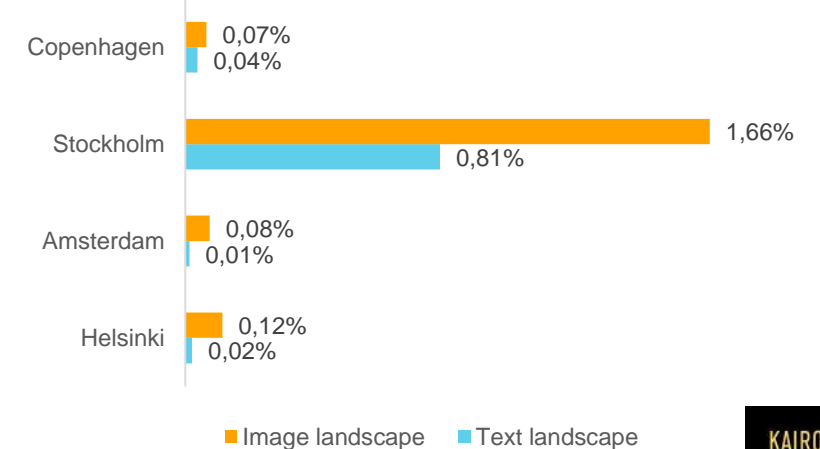
Public art

- Subway art
- Palaces
- Design



Subway art

- **The novelty of accessible art:** Almost every social media post on the Stockholm subway references it as ‘the longest underground art gallery in the world’. With boldly designed murals unique to every station, each stop provides a traveler with a different visual experience. From the perspective of Chinese travelers, for whom art is often conceived as a luxury commodity (or an asset), the concept of ‘subway-as-art’ reflects good value. If each platform is a scenic spot, as one traveler noted, ‘one entry ticket will get you access to all stops!’
- **A comparative perspective:** While the concept of ‘subway-as-art’ reflects budget consciousness it also stands as a reflection of China’s economic growth. Stockholm’s creative stations stand in contrast to the “mass-produced” subway stations in major cities in China, where subway networks are rapidly expanded but where most stations across the country look similar to each other. In addition to viewing the subway from a Chinese perspective, more travelers are comparing it with subway systems in other metropolitan cities: according to one post, the Stockholm subway is “more artistic than the London Underground, more romantic than the Paris Metro.”
- **Even the mundane is wonderful:** Beyond its function as a means of transportation, the subway itself becomes a part of a traveler’s experience. As large scale public art, the stations (and their unique murals) create an immersive experience, bridging the gap between accommodation and the start of a visit to an attraction.

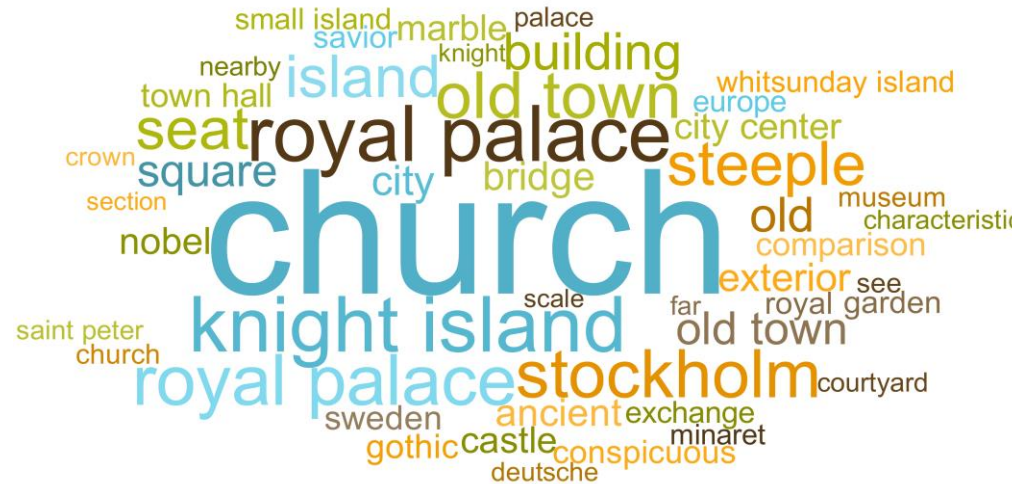


“Travelling in Nordic is **full of surprises**, some of which are hidden underground: Stockholm Metro **conveys a strong atmosphere of literature and art**, known as the youth of literature and art among metros.”

“It reminds me of Stockholm subway station, which is called **”the longest art corridor“**. It’s really famous! I experienced the blue line and the red line of the subway in two days. The ‘Rainbow Station’ stands on the red line. My dear friends, **don’t miss such a beautiful place in Sweden!**”

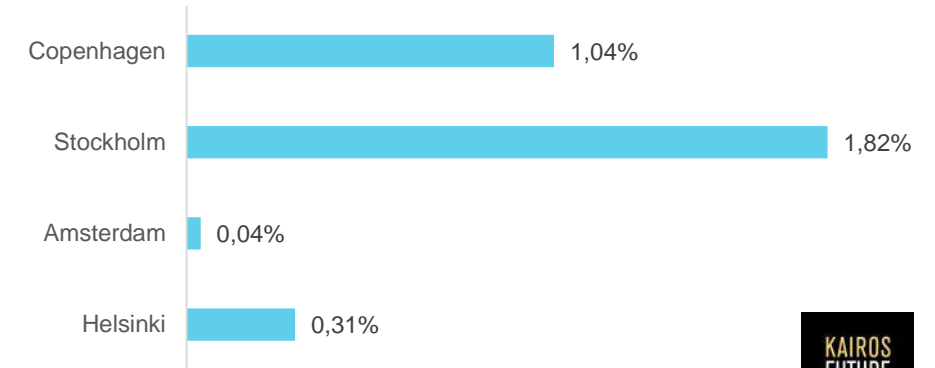
Palaces

- A comparative perspective:** A different style from China’s Forbidden City, Sweden’s Royal Palace impresses Chinese travelers with its ‘exquisite’ relief, decor, and set of crowns on display. Relative to the highly ornate architecture of France’s royal palaces, visitors describe castle Drottningholm (the home of the King and Queen of Sweden) as the country’s “Little Château de Versailles”. As one post mentions, in contrast with the solid stone buildings seen in Europe, ancient Chinese buildings seem vulnerable in comparison.
- The connection between ‘luxury’ and value judgement:** The connection to luxury and leadership (vis-à-vis the royal family) is not always seen positively in China, as expressed in several of the posts we analyzed. In spite of finding themselves amazed by the ornate design of European palaces, the (relatively more) low-key architecture of Scandinavian palaces (in comparison to palaces like Versailles) are thought by some posters on social media to embody the diligence of the country’s people.



“I think the Swedish Royal family is sort of low-key luxury.”

*“Compared with the luxury and delicacy of the Imperial Palace in Western European countries, the palace here is **more homey**.”*



Design is everywhere

- **A deep interest in design:** Famous for its simplicity and elegance, Scandinavian design charms Chinese travelers. While home furnishing is a key source of exposure to the oeuvre (IKEA has a large presence in China), visitors' interest in design extends to public spaces (like public squares), church design, and industrial design. Several travelers expressed their surprise to find designs in the "small details", like the design of lockers in museums.

*"We **totally felt the charm** of the Nordic design. You know what? **A small button hook on the clothes is a ticket**. When you leave, **the box for recycling the button hooks is also used as a ballot box**, to investigate how much visitors like the museum. So clever!"*

*"Among all kinds of shops, we **like the Nordic-style home furnishing design shops most**. Bot color and design are very good. I **have the impulse to have all of them at home**."*



Attractions



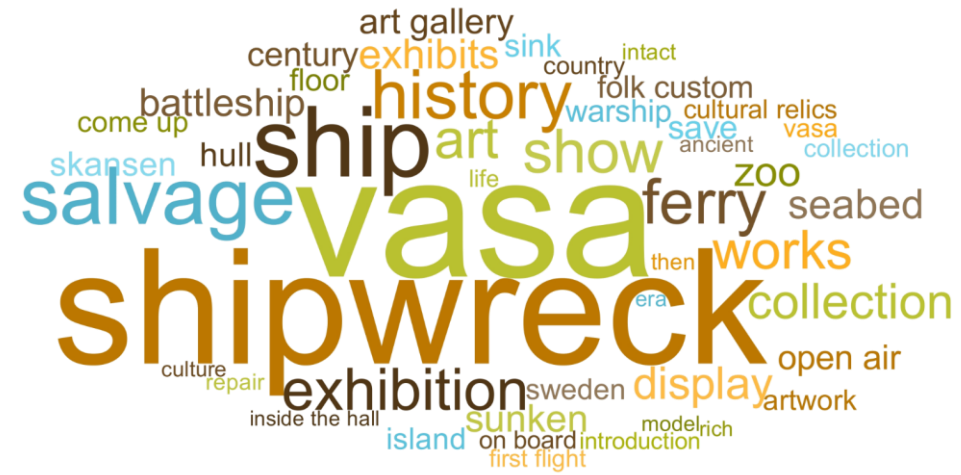
Attractions

- Museums
- The Changing of the Guard
- 'The Little Mermaid' statue
- City Hall
- Old towns
- Green outdoor spaces
- Water
- Animals



Museums

- Museums as an opportunity to ‘deep dive’ into specifics:** Popular museum visits discussed on social media include the Abba Museum, the Nobel Museum, and the Skansen Museum, with the Vasa Museum and Nordic Museum mentioned most frequently. Whether about band or a shipwreck, attractions like these give visitors a chance to do a ‘deep dive’ into specific subject matter. In the many posts about the highly popular Vasa Museum, multiple discussions noted that carvings on the ship and the detailed, ‘up-close’ exhibits left visitors in the mood to reflect upon the advancement of civilization and human history. This not unlike the way China’s top museums – like the Forbidden City – engages its visitors.
- Visitors are selective in their interest of history:** While attractions with a clear cultural reference (the Abba Museum) or purpose and narratives (like the Abba Museum or the Vasa Museum) see high levels of interest, Chinese travelers express mixed feelings about Stockholm’s Nordic Museum. Although travelers see the architecture as ‘magnificent’, a visit to the Nordic Museum is often described as ‘boring’ by visitors who are not familiar with Scandinavian culture and history.
- Desire for recognition of China:** As one post mentioned, travelers recommend that museums translate more of their information into Chinese, and hire Chinese tour guides and interpreters as a way to improve visitors’ levels of understanding, engagement, and experience.

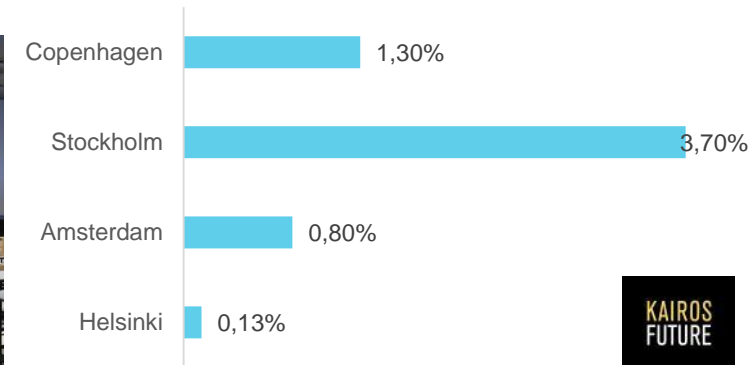


*“The content is so rich that it takes at least two hours. It’s worth it. It tells the story of Abba’s whole life and the brilliant achievements. **The interactions are unforgettable.** It’s recommended to **rent an interpreter** to learn more about Abba.”*



*“Next to the Vasa Museum, it looks majestic. If you are not familiar with the history of Scandinavian culture, it’s **boring.**”*

*“(Vasa Museum is) Stockholm’s **most famous scenic spot.** Anyone who is interested in European history **cannot miss this.** The complete shipwreck is **very shocking.** Every detail carved on the ship is **a work of art.**”*

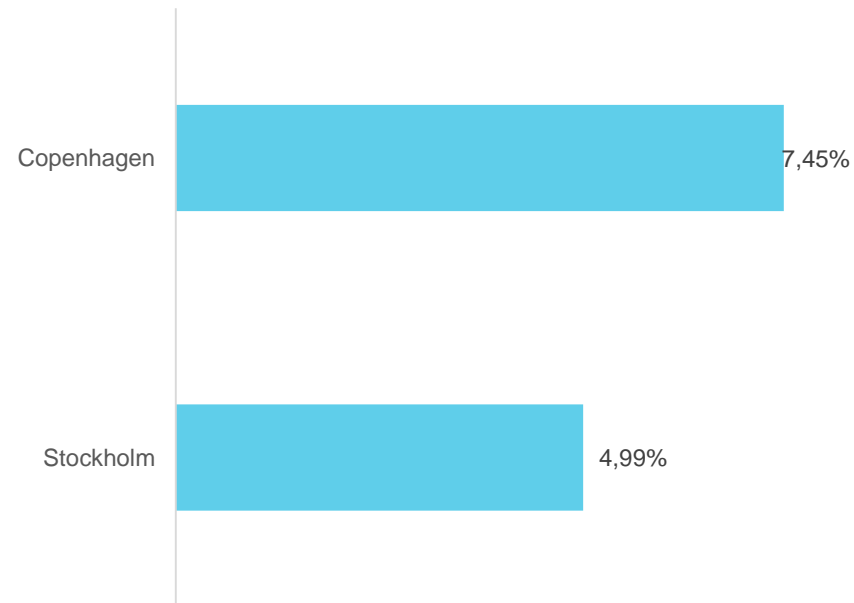


The Changing of the Guard

- **References to media and comparative displays of Chinese hard power:** For Chinese travelers, the Swedish and Danish Changing of the Guard ceremonies evoke multiple connections to cultural references. One point of reference in photo posts is a Chinese TV drama, whose characters appear in similarly colored blue uniforms to those of the real military guards on display. Travelers feel that in comparison to Chinese military displays, the ceremony is “fun to watch”, leaving comments like “it’s not very serious and very funny”. Other comments include: “The ceremony is very consistent with the Swedish philosophy of life. The balance between the sense of ceremony and the interaction of joy is just right.”



“To the accompaniment of the royal guard band, we saw the soldiers in tall hats and uniforms changing their guards. It’s like a scene in the cartoon. Very interesting. We also took photos with the soldiers who stand at the post after the ceremony.”



'The Little Mermaid' statue

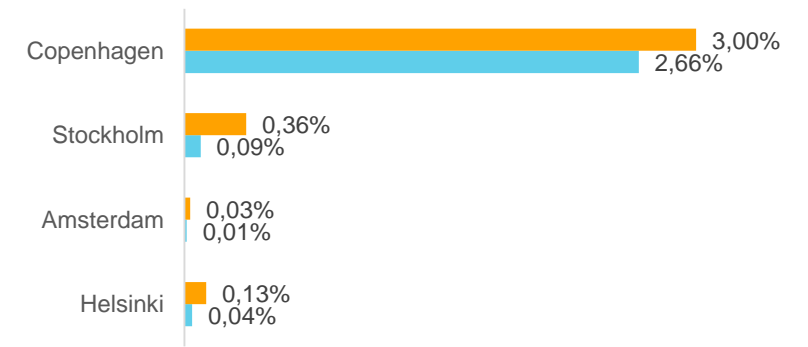
- Copenhagen's 'calling card': the Little Mermaid statue:** Chinese travelers view the Little Mermaid statue as the 'calling card' of Copenhagen. The statue is often described as 'unmissable'. It is of note that in their posts, those who have visited it also try to manage others' expectations (while expressing mild disappointment) that it might not live up to the hype. In the wider context, the statue is a part of a broader cultural history that encompasses visual art and a literary context (like Hamlet).
- The statue is still relevant, and still matters:** In spite of this, and that many travelers express that they already know from online discussions that the statue itself is small and crowded with Chinese tourists, the statue holds a similar kind of status to the city as the Great Wall does to Beijing. While most visitors expressed disappointment that the attraction did not meet their expectations, rushing to see it, and taking photos of it (and with it) still matters. This attraction, which sits on the coastline of Copenhagen, can be viewed as the physical manifestation of familiar fairy tales from childhood, in the homeland of the author himself. At the intersection of fairy tales, reality, and escapism (via the journey to Denmark), the statue can be considered a symbol of childhood. Its existence provides a kind of 'evidence' that fairy tales, in some way, are real.



"If I don't visit the Mermaid, it makes me feel like that I've never been to Denmark. Although I've lowered my expectations, when I saw it, I was still a little disappointed to see such a small bronze statue."

"You must come early in the morning. After 10am, it's all people around. There is no way to take a good photo."

"I went to Copenhagen for the little mermaid, but I was disappointed when I got there. Nothing special."

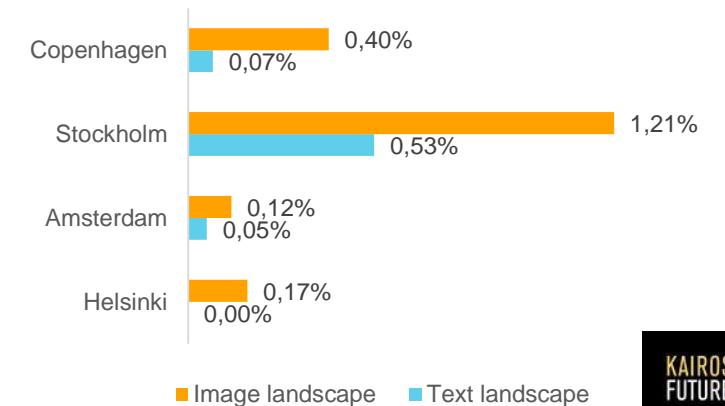


City Hall

- **A vantage point for photographers:** City Hall is not only a working government building and the site of prestigious events (like the annual Nobel Prize banquet), but a place tourists can use as a vantage point for photography. Comments from travelers focus on the 'panoramic view', with many posts describing the climb up the City Hall tower as 'worth it', in spite of the height (for those who with a fear of heights). In comparison to other spots in the city, visitors get a bird's-eye view of the city, with almost no tall buildings obstructing the skyline, yet consider it 'unique' and 'lovely'. In addition, practical considerations (such as opening times) are shared by travelers. With the majority of posts centering around photography tips, the surrounding views around City Hall are described as 'beautiful'.
- **Interest in visiting a working government building:** As a destination in and of itself, Stockholm City Hall attracts a significant amount of attention, especially as sites of the Nobel Prize ceremony. Tourists are curious about the Blue Hall and Golden Hall, with many discussions on why the 'Blue Hall' is named as such (when it is in fact red in color), and the Golden Hall's mosaic design, which highlights 'history', 'humanity', 'tradition' and 'customs'.



"When you get to the top of the TV Tower, you can have a panoramic view of the whole Stockholm. It's definitely worth a visit!"



"There are many tourist attractions in Stockholm where you can overlook the whole city, such as the TV Tower, City Hall. Since I like these two round balls, I came to 'Sky View'."



Old towns

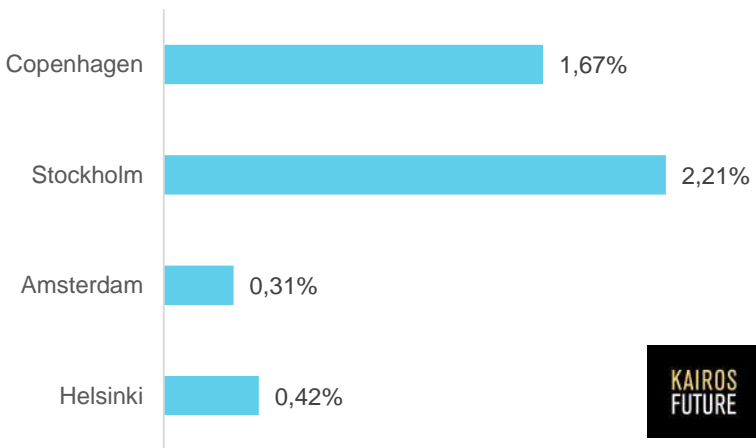
- Photos as ‘evidence’ of travel:** For a Chinese traveler, if foreign travel is aspirational and a reflection of status, photos act as digital souvenirs that can be immediately shared with friends, family, and one’s broader network. With travelers sharing tips on the most picturesque and photogenic spots in the old town, and many advising dusk as the best time for lighting, we observe the consistent importance of photos as ‘evidence’ of travel.
- Uniqueness is important:** Visitors describe that walking through the ‘mid-century lanes’, lined with ‘cobblestones’ and ‘colorful architecture’ (including homes) feels like time traveling back in time to ‘medieval Europe’. In spite of their complaints about large crowds of tourists and too many souvenir shops, for Chinese travelers, old towns are a destination special enough to be worthy of recording their visit to.



*“I don’t like the atmosphere of the old town very much. There are **too many tourists and souvenir shops**. This is not the most lovely place in Stockholm, but those **design shops are still interesting.**”*

*“The key point – **A great place to take photos is at the river when you walk out of the museum.** Especially at dusk, you can see the old town. The sun sprinkles on the buildings of the old town, which is golden! How beautiful!”*

*“Walking around the alley in the old town, **a variety of boutiques and small cafes make you linger.**”*



Water

- **Surrounded by water:** One of the largest clusters in the image landscape is water. Conveying tranquility, water has clear associations with perception and branding. In the minds of visitors, Stockholm is the 'Venice of Scandinavia' and Copenhagen's Nyhavn, which Chinese tourists acknowledge as a necessary attraction to visit (although a tourist trap).
- **Boats:** One visitor expresses a strong desire to experience Stockholm from a boat cruise, circling the city from a unique vantage point.
- **Simpler compositions next to water:** In addition to these images, we also see 'simpler' compositions, for example, photos where the photographer is clearly positioned (or taking the photo) next to water, with the city in the background, or photos of a trip en route to the archipelago outside of Stockholm.



Animals

- **The key to engagement is cuteness:** While more traditional animal-based attractions – such as aquariums and deer parks – do feature in the image landscape, tourists are drawn to cute animals. Seeing animals “in the wild” – rabbits, foxes, squirrels, pigs, and horses on the street is thrilling for visitors coming from a rapidly urbanizing country.



*"After Helgeandsholmen, I walked along the river, and finally came to the Kungliga Operan. Compared with the **quietness** along the way, here is **bustling with people**. The seagulls in the sky, swans and ducks in the river also bring more vitality to this morning."*

*"I saw a lot of animals, including reptiles, insects, amphibians and fish. The most interesting among them are some Arctic animals, such as Arctic fox, polar bear and reindeer. Some Swedish parents brought their children here. Witnessing their smiling faces, **I understood the meaning of 'Scandinavian happiness'.**"*



Feelings



Feelings

- Coziness
- “Fairy tale country”: the Hans Christian Andersen impact
- Scenery and views



Coziness

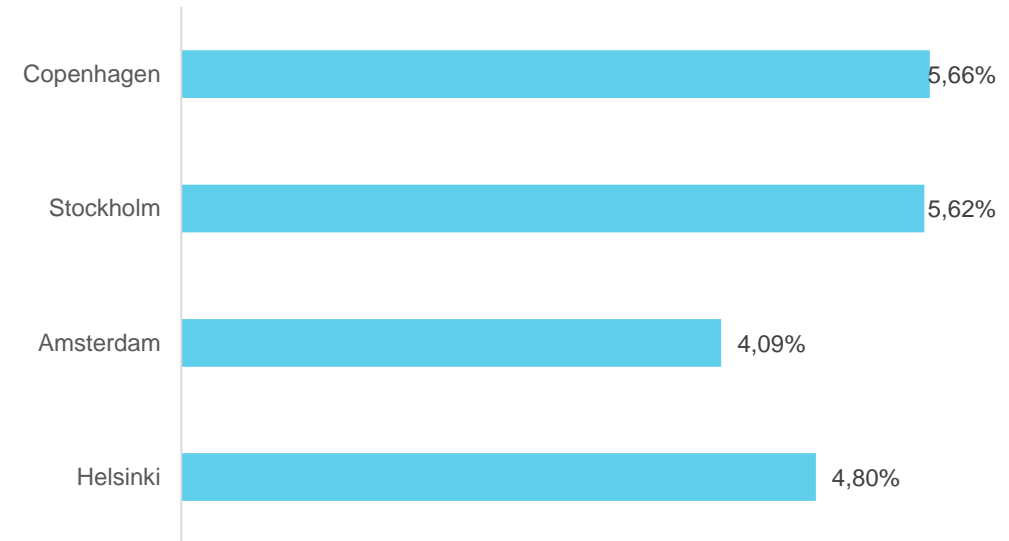
If Chinese travelers see the cold as a 'problem' to contend with on their holiday, coziness is a 'solution' for both visitors and locals alike.

- **Identifying the cold weather as a 'problem':** Chinese travelers recognize that winters in the Scandinavian climate are a challenge, and that the long, dark nights do dampen the spirits.
- **The solution? The notion of coziness:** In Stockholm, Chinese travelers note the elements of Swedish culture that battle this: the warmth created by candles and lights decorating homes, cafés, and restaurants, streets filled with people relaxing at wine bars, enjoying music and drinks with friends. These elements of coziness create comfort from the cold for travelers - just as they do for the locals.



*"In warm spring, the western symmetrical garden on the Queen's Island Palace is very beautiful. It's **nice to have a picnic in the sunshine** and watch the sky and clouds."*

*"The seaside park is my favorite area in Copenhagen. There is a **relaxed and quiet atmosphere everywhere**. The **seaside scenery is pleasant**. Whether it's **riding or walking**, it's a kind of enjoyment. We really want to **integrate into Copenhagen like a local**."*

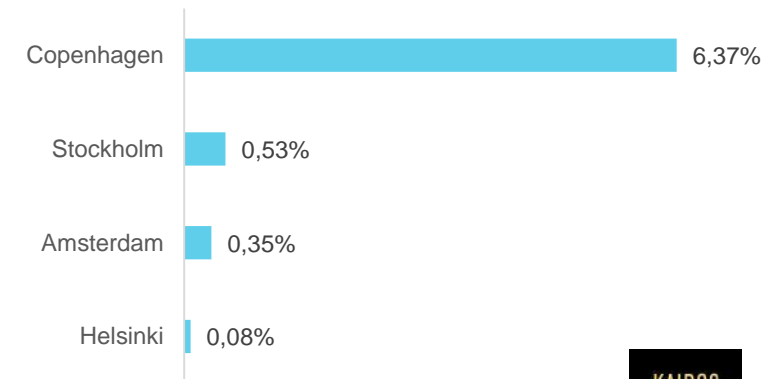
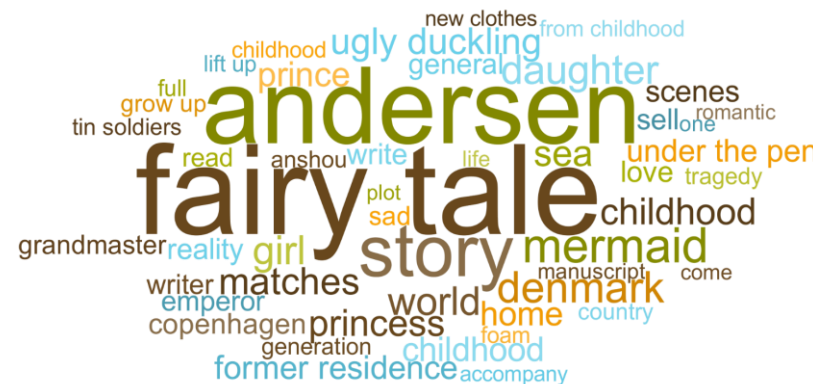


“Fairy tale country”: the Hans Christian Andersen impact

- The power of childhood memories as ‘soft power’:** Hans Christian Andersen’s fairy tales inspire the many Chinese travelers who are familiar with his work to visit Denmark. From the posts we analyzed, "mermaid", "Andersen" and "fairy tale" are the three key words that come up when travelers think of when talking about Denmark. The impact of z work has left a deep impression on Chinese travelers: with fond memories of his stories from childhood, many Chinese visitors view Denmark as the most ‘cordial’ among the five Nordic countries. This leads them to go in search of the author’s footprint, such as paying a visit Copenhagen’s Little Mermaid statue.

“For us Chinese, Denmark is the most attractive among the Nordic countries, because everyone knows Andersen's fairy tales.”

*"As night fell, the lights on both sides of the river began to light up. I **couldn't help thinking of Andersen's fairy tales**. I like fairy tales since I was in primary school. I **dreamed** that someday I could visit Andersen's hometown in person, and now it has finally come true."*



Lifestyle



Lifestyle

- Quality of life
- Bicycles
- Flowers and plants



Quality of life

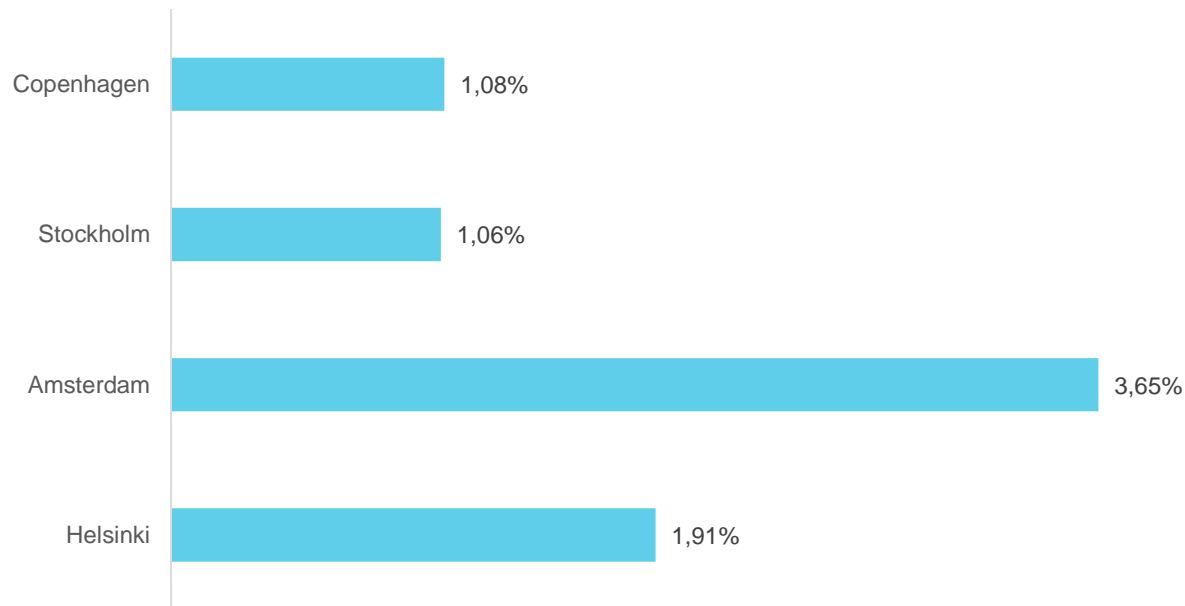
- **Observation, validation, and exploration:** Chinese travelers note in their posts that in 2019, Copenhagen was rated as the best travel city by Lonely Planet. This confirms their observations: travelers comment that the city provides visitors with an abundance of experiences. Referred to by travelers as the home of innovative new Nordic cuisine, excellent modern architectural design, the *hygge* concept, and a proponent of strong work-life balance, sustainable development and urban planning, Copenhagen is a highly livable city.
- **“The most livable city in the world”:** It has not gone unnoticed by Chinese travelers that Copenhagen has also been selected as "the most livable city in the world" by United Nations Human Settlements Programme, and in a different ranking, named “the best design city”. These designations are meaningful to visitors coming from a country undergoing rapid urbanization. Chinese travelers take note of the relative tranquility cities like Copenhagen offer both residents and visitors alike. With mental health and general wellness increasingly a topic of conversation around the world, Copenhagen (and Denmark) is viewed by travelers as a happy place to live, inspiring visitors to explore the lifestyles of local residents.

*“(Copenhagen) has been selected as the "most livable city" by United Nations Human Settlements Programme. **The unique charm – a combination of ancient and modern senses makes people eager to visit there.**”*



Flowers and plants

- **From the decorative to the mundane, a love of flora and fauna:** Flowers, both elaborate and highly decorative (like flower arrangements) and not (like bushes of flowers by the side of the road), are highly visible in the image landscape. Visitors are attracted to beautiful plants, including celebrities (several photos show a Korean popstar visiting a typical flower shop). Photos of mushrooms and pine cones – subjects of fascination by visitors but items that would be considered mundane by local residents – appear as a kind of symbol of local life.



Food and drink



Food and drink

- Enjoying coffee in a café
- Food and dining



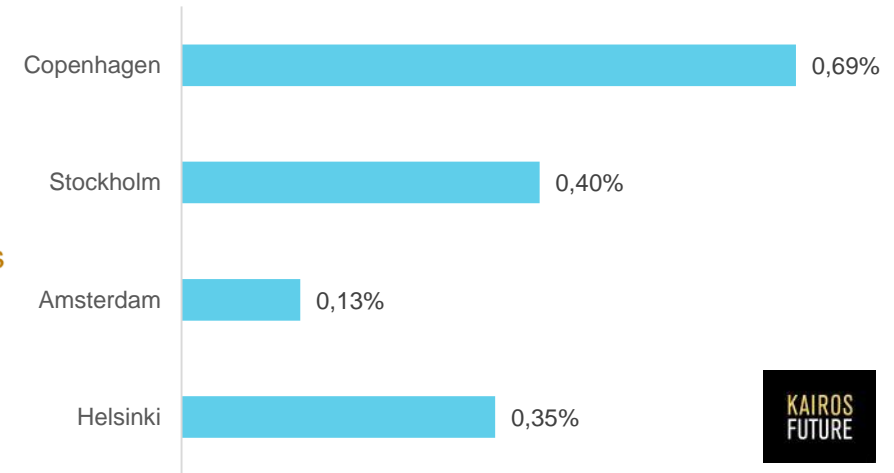
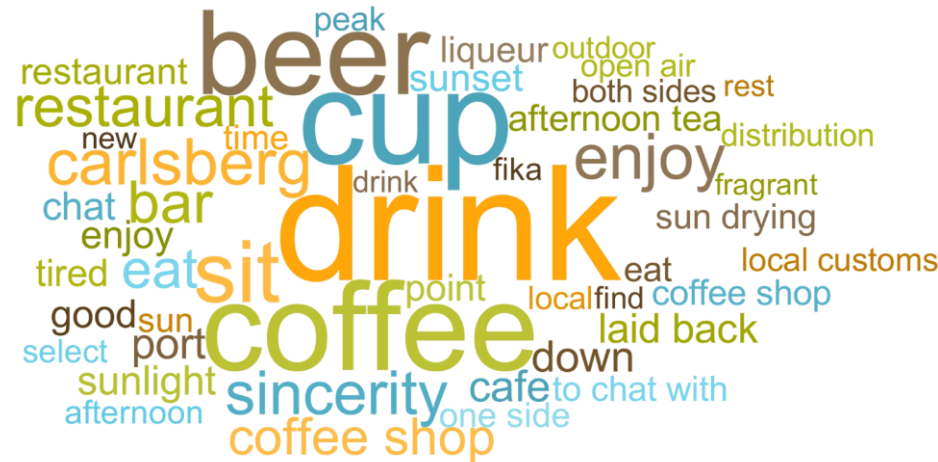
Enjoying coffee in a café

- Drinking coffee in cafés as an act of leisure:** Many posts describe the act of drinking coffee while ‘people watching’ as pleasant and relaxing. While tea has long been the dominant drink of choice in China, interest in coffee continues to rise. Rather than simply drinking a beverage, the act of drinking coffee confers a sense of leisure. Travelers discuss that taking the time to sit and enjoy a cup of coffee allows them to move at a slower pace and relax.



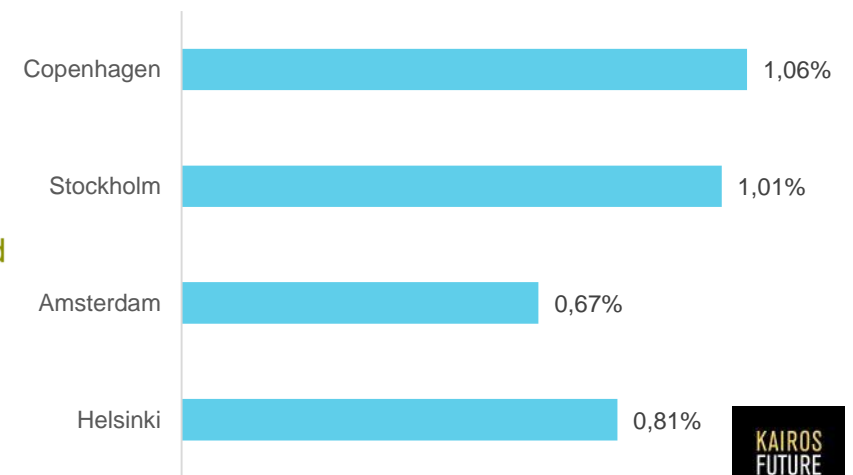
*“It’s a good choice to sit down and **drink a cup of strong latte** in a café in the old town and write a postcard to your friend. There is a special word in Sweden: **FIKA**, meaning sitting in the cafe and doing nothing.”*

*“When you’re tired, you can **sit down and ask for a glass of wine or a cup of coffee**. We enjoyed watching people **walking by** on the street, which seems a flowing landscape.”*



Food and dining

- From fine dining to fast food to deli-style:** Visitors are keen on fancy seafood platters and fish, which are a key feature of the food cluster in the image landscape. In contrast to photos of fancy seafood platters, we also see sustained interest in documenting the consumption of everyday dishes. Visitors want to sample the stereotypical local cuisine, including Danish smørrebrød, pies, sandwiches, French fries, hot dogs, meatballs, and simple soups, which we also see through the highlighting of purchases in supermarket baskets and deli-style displays.
- Desserts:** Cakes and pastries are also extremely popular with travelers, with photos of cakes, macarons, and other desserts feature widely.
- Design and food:** Motifs on mugs, the designs on beer cans, and wine glasses and cups in fancier environments and cafes are well-documented.
- Recurring key words:** ‘Chocolate’, ‘semla’ (a seasonal Swedish cream puff), ‘salmon’, ‘sandwiches’, ‘brunch’, ‘espresso’, ‘meatballs’, ‘coffee’, ‘bread’, ‘breakfast’, and ‘waitstaff’.



谢谢

Thank you

Tack

Tak



About Kairos Future

Kairos Future is an international consulting and research company that assists companies, organizations and leaders to understand and shape their futures. We work as consultants for strategic futures, providing our clients with trend analysis and scenario planning, strategy and innovation, strategic change and capability development. Our vision is a world where everybody puts future first.

The company was founded in 1993, with its head office in Stockholm offices in Gothenburg, Malmö, Barcelona, Shanghai, and Istanbul, and representatives and partners around the globe.

For more information, please contact:

Tomas Larsson

Mobile: +86 185 0170 3546 | +46 (0)70 615 55 57

Email: tomas.larsson@kairosfuture.com

