

THE CHINESE TRAVELLER

TO STOCKHOLM

2019

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INTRODUCTION

This report explores Chinese visitors travelling to Stockholm. The report follows a Chinese visitor report conducted in 2016.

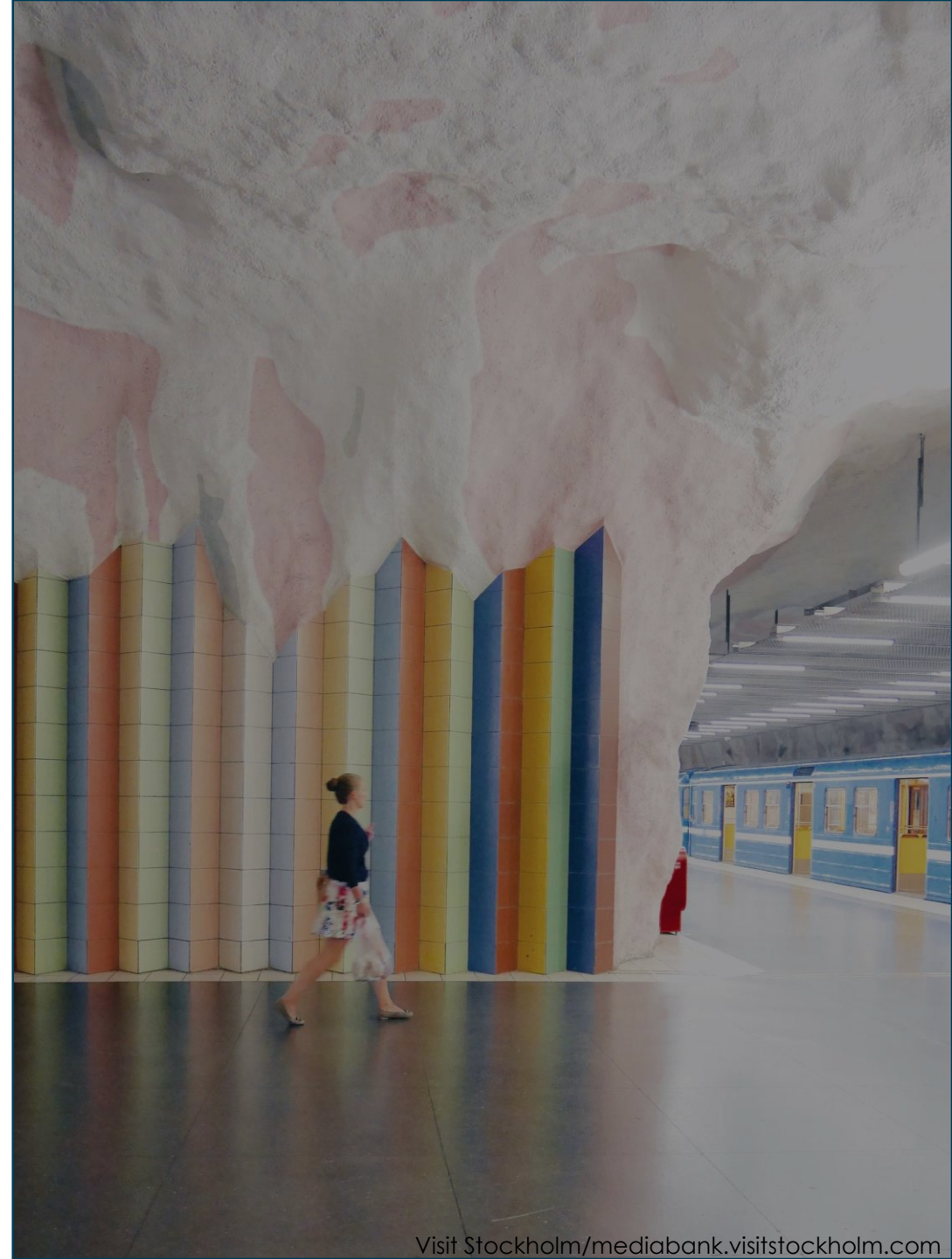
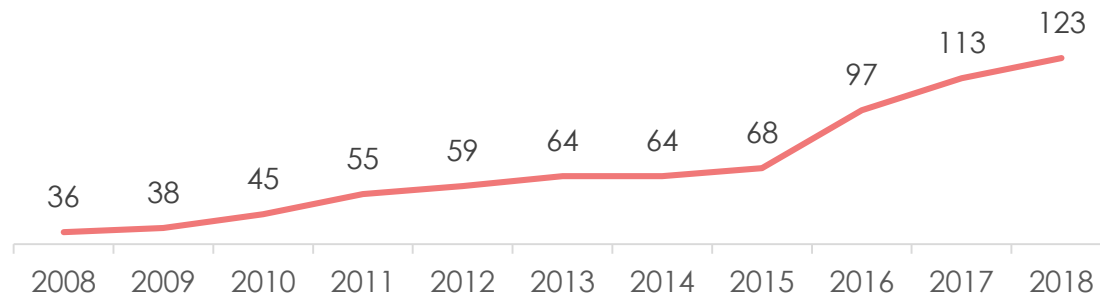
A similar study was conducted at Copenhagen Airport. These results are presented in a separate report and can be found at www.chinavia.se.

Overview of the Chinese travel market

China has been the world's largest source market for outbound tourism since 2012. In 2018, Chinese travellers accounted for almost 150 million outbound trips (+15%) and a total spent of more than USD 277 billion (+5%) during their travels abroad.

An overall increase in outbound trips from China has also resulted in an increase in Chinese visitors travelling to Stockholm. Within 10 years, the number of Chinese bed nights in Stockholm has increased with more than 230%. In 2018, China was the 11th largest international market in Stockholm with Chinese bed nights amounting to 123,000 - an increase of more than 8% compared to 2017.²

Chinese bed nights in Stockholm ('000)²



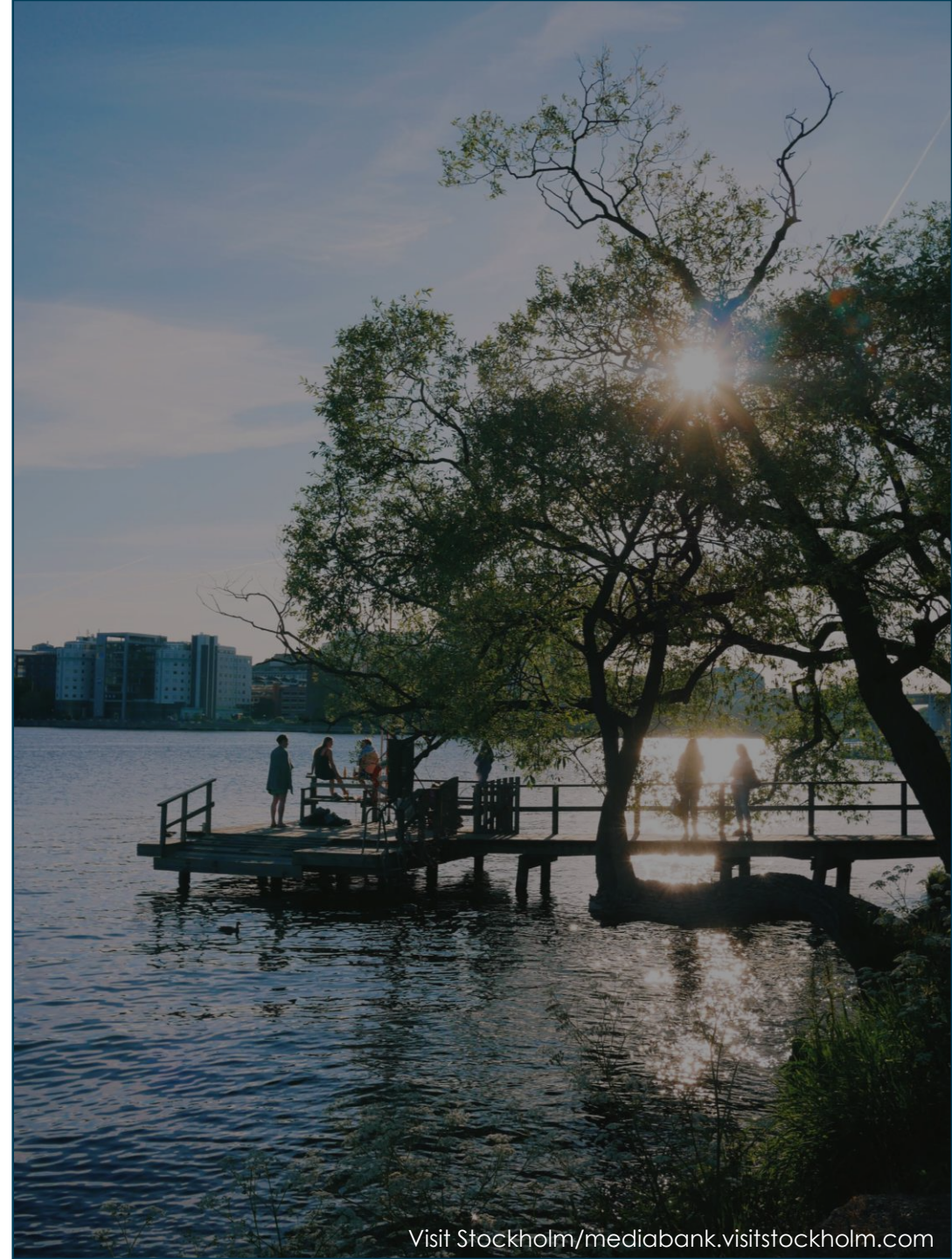
METHODOLOGY

Data was collected by the company Wilke at Arlanda Airport in Stockholm from the 4th July to 25th September. Interviews were conducted in Chinese and answers registered on an iPad.

Two screening questions were used to make sure that the respondents were in fact Chinese citizens and had visited Stockholm. In total 408 respondents participated in the survey. The results presented in this report will in many cases exclude the 18.9% (77) respondents who stated they were here on business as they did not receive all questions. If business travellers have been included in the sample size it amounts to 408 respondents and a star* has been added to denote this inclusion.

Due to the sample size, the statistical uncertainty of the results is fairly high when two questions are cross tabulated and subgroups are created. Therefore, the results presented in this report shall only be seen as trends that must be further investigated if critical decisions are to be made.

When necessary, the results in this report will be compared with a previous visitor report (2016) as well other relevant reports.



PROFILE OF THE RESPONDENTS



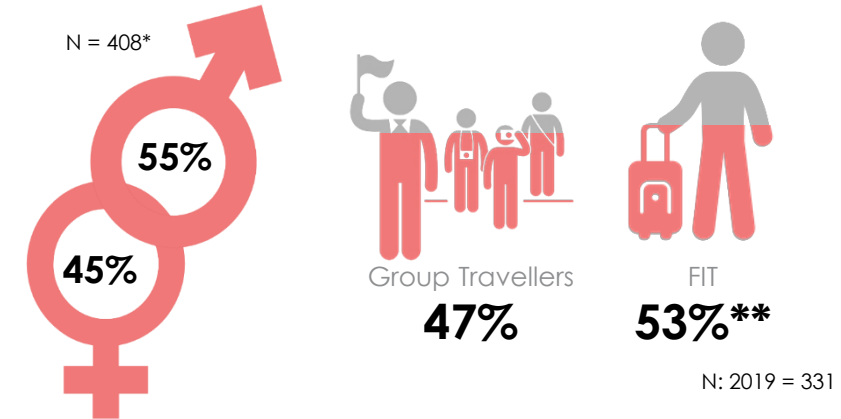
DEMOGRAPHICS

In this study, men and women make up an almost equal share of the respondents. Although there is a wide age distribution, more than 60% are younger than 44 years, making the average age of the respondents 43.

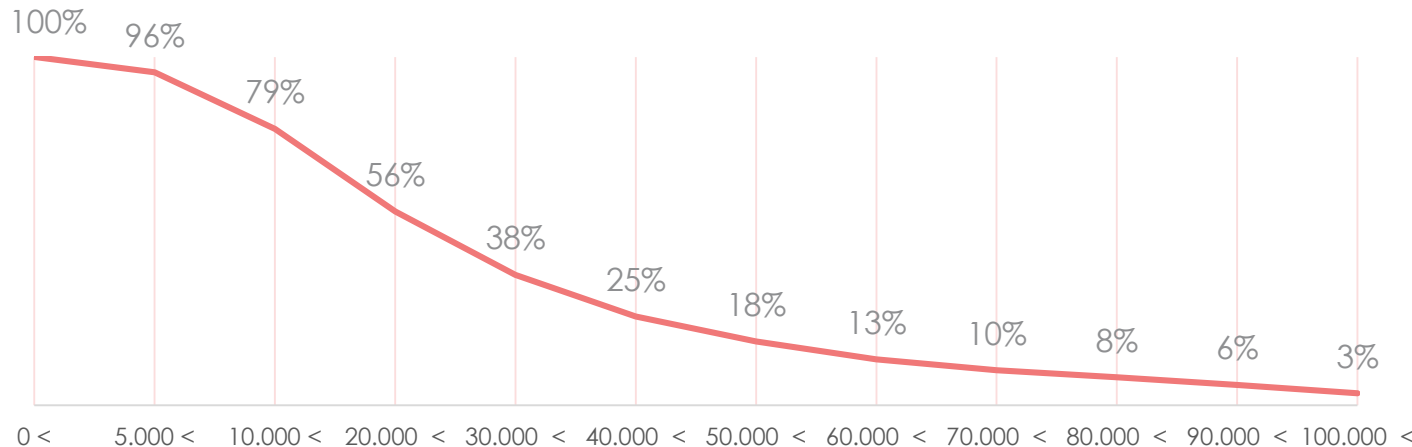
When asked about their monthly household income, 38% stated it is above 30,000 CNY, 13% stated it is above 50,000 CNY and 6% stated it is more than 90,000 CNY. This is an increase in the average household income compared to the previous survey. Thus, in 2016, only 28% of the respondents had an income above 30,000 CNY and 10% an income above 60,000 CNY.

These Chinese travellers are primarily visiting Stockholm for the purpose of leisure (61%) and only 1 out of 5 are in Stockholm for business. This report will mostly focus on leisure travellers, which is why business travellers are in many cases excluded.

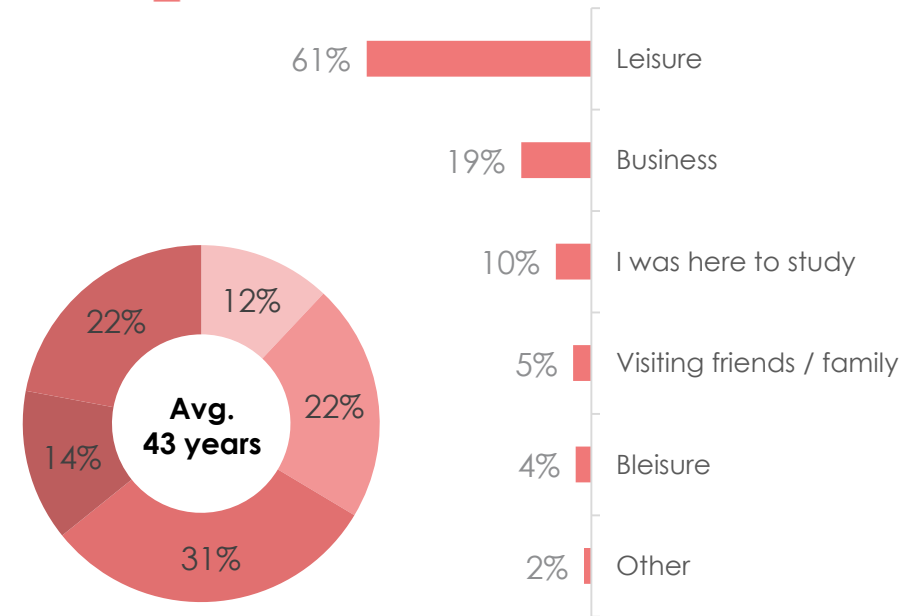
47% of leisure travellers define themselves as group travellers, a surprising increase from 2016 where only 41% travelled in groups.



Household Income CNY



N: 2019 = 408*



■ <24 years
 ■ 25-34 years
 ■ 35-44 years
■ 45-54 years
 ■ +55 years

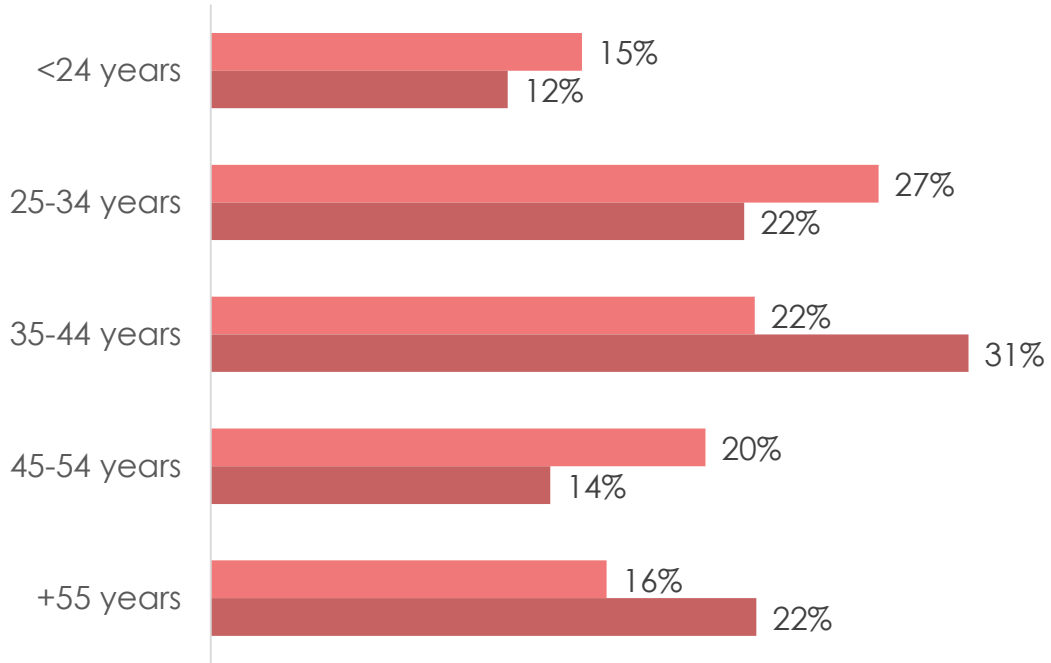
N: 2019 = 408*

** 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.

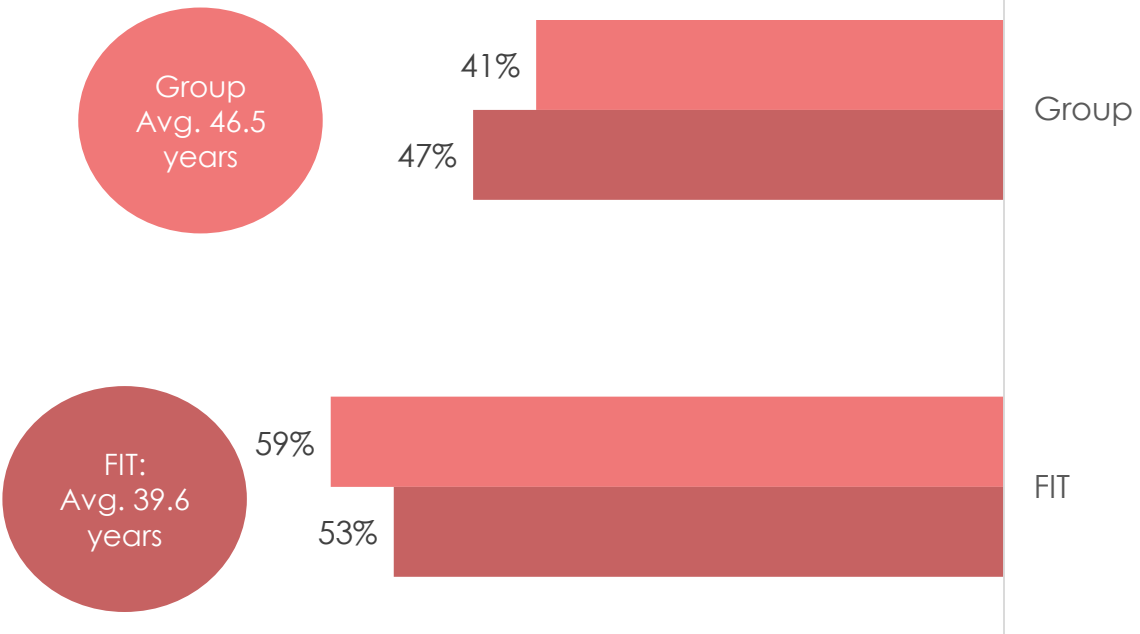
DEMOGRAPHICS

53% of the respondents defined themselves as free independent travellers (FITs). This is a small decrease compared to 2016 where 59% were FITs. When looking exclusively at leisure travellers the number of FITs only make up 38%. The average age of group travellers have increased from 45 years in 2016 to 46.5 years in 2019. Similarly, the average age of FITs have increased from 36 years to 39.5 years.

AGE



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



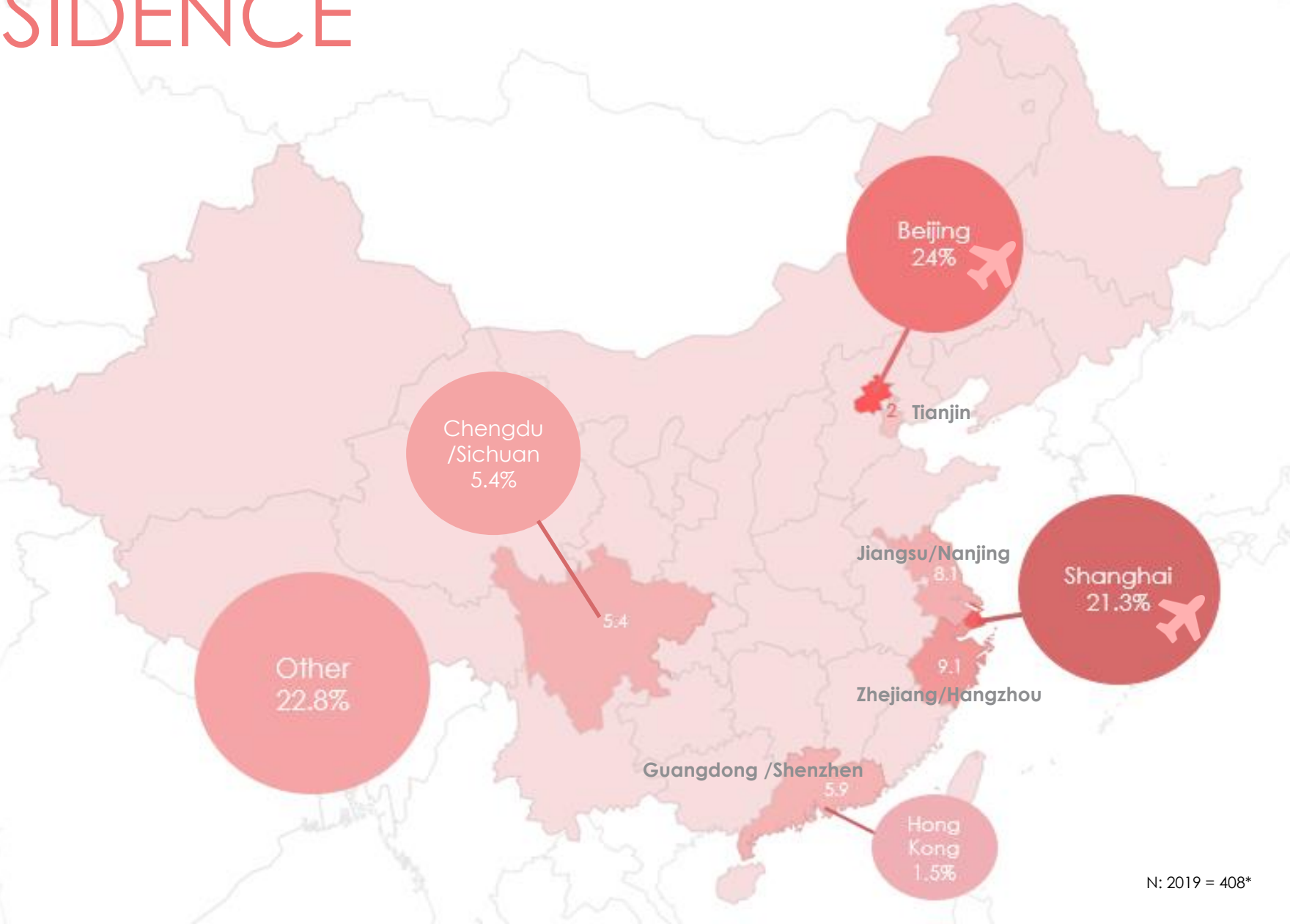
2016 = 404
2019 = 408*

2016 = 404
2019 = 331

AREA OF RESIDENCE

The map is an overview of the places of residence of the respondents in this study. The majority resides on the East coast of China, more specifically Beijing (24%) and Shanghai (21%) and its surrounding areas. The remaining part of the respondents are from the Sichuan province (5%), the Guangdong province (6%) and other parts of China (around 23%).

It is worth noting that both Beijing and Shanghai have direct flights to Arlanda Airport in Stockholm.

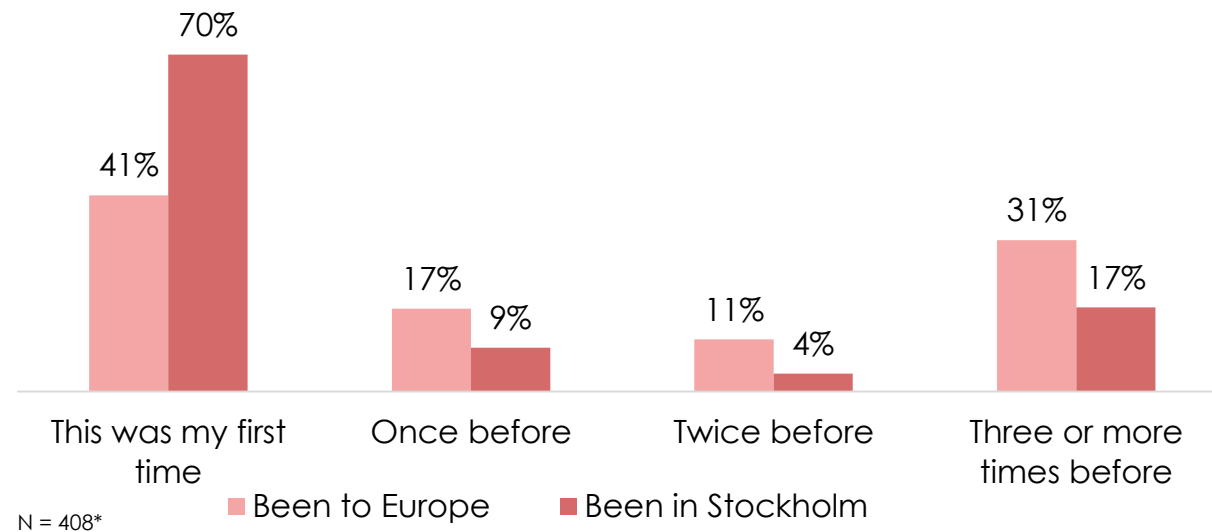


TRAVEL EXPERIENCE

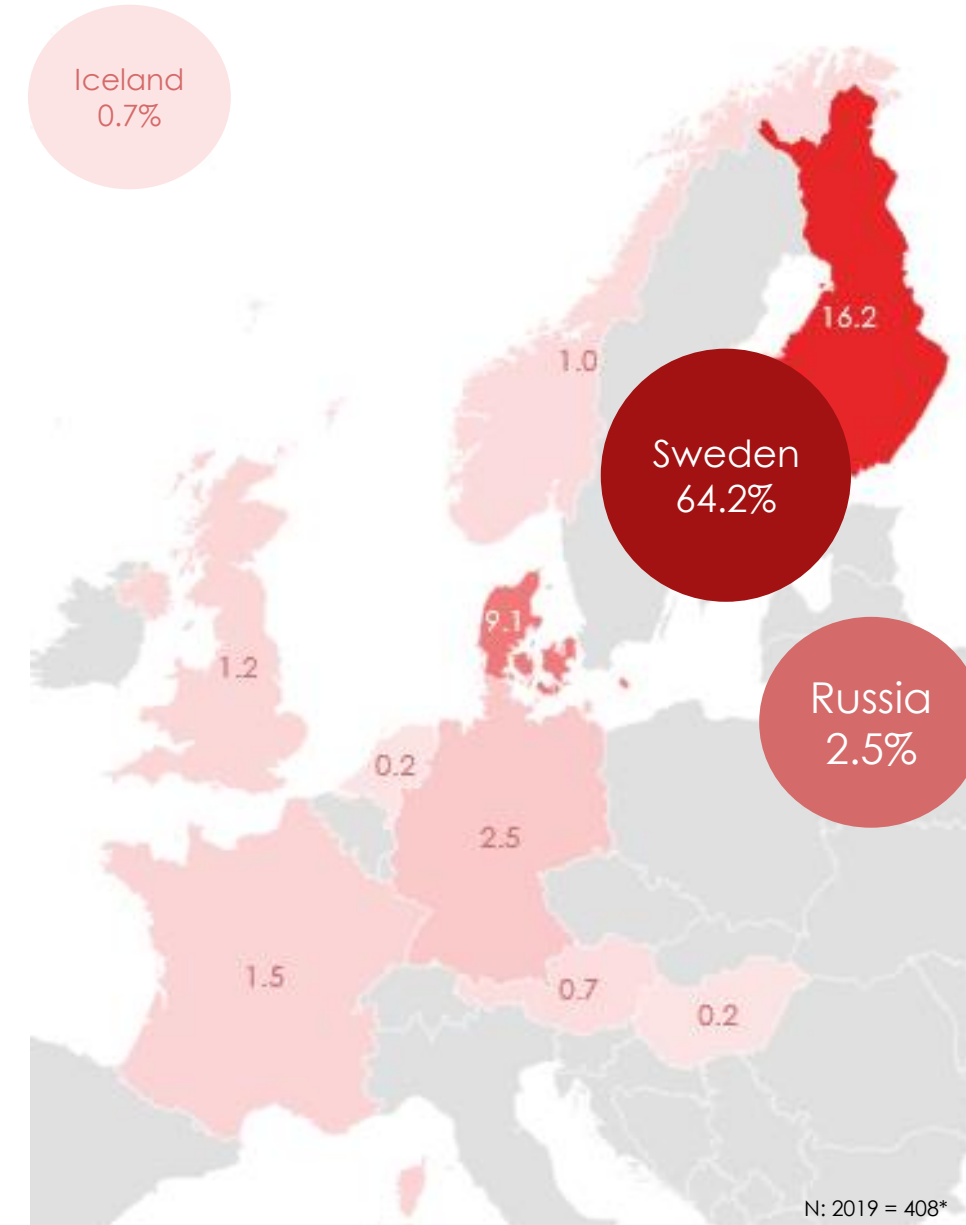
Among all the Chinese travellers in this study, 41% are visiting Europe for the first time. This number is considerably higher for group travellers (54%) than for FITs (36%).

For 70% of the respondents this is their first time to Stockholm, which is almost the same as in 2016 where 74% of the respondents were in Stockholm for the first time. Stockholm is the first point of entry for 64% of these Chinese travellers, followed by Helsinki (16.2%) and Copenhagen (9.1%).

How many times have you been to Europe/Stockholm?



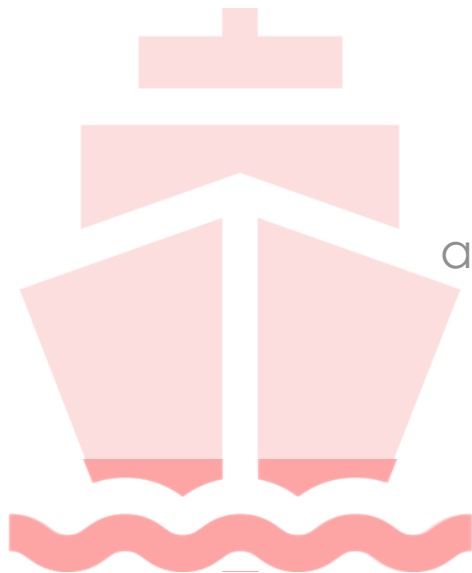
What was your point of entry into Europe?



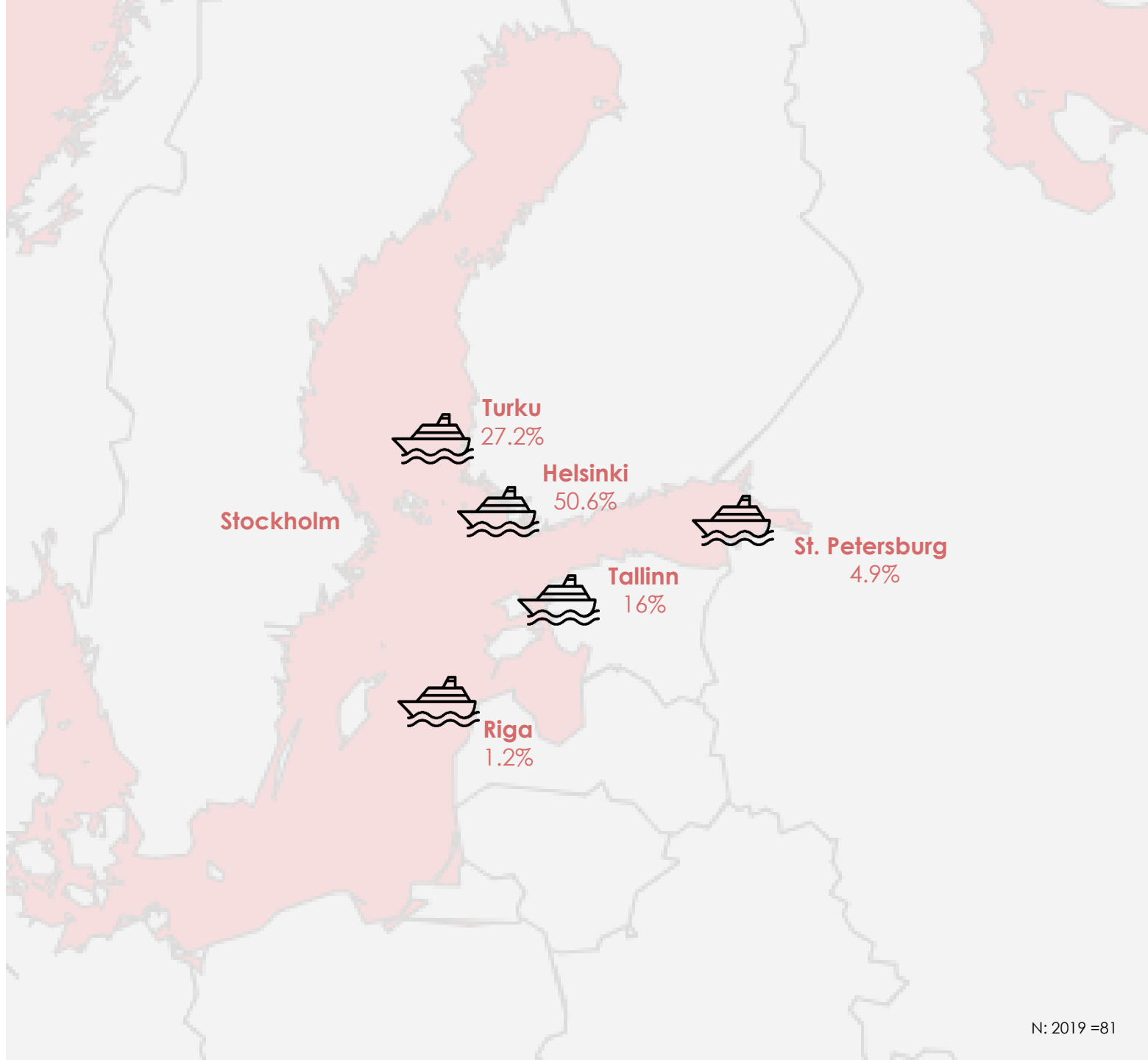
FERRY ARRIVAL

One out of five Chinese travellers arrive to Stockholm by ferry. The vast majority comes from Finland but some also arrive from Tallinn, St. Petersburg and Riga.

86% of Chinese visitors arriving with ferry identify themselves as group travellers. The respondents who arrive by ferry stay 10.3 nights in Europe on average and 5.3 nights on average in Stockholm.



20%
arrive with a
ferry



TRAVEL DURATION

A wide-angle photograph of a frozen body of water in Stockholm, Sweden. In the foreground, a person wearing a red jacket and dark pants is ice skating on the smooth, dark ice. The background features a panoramic view of the city, including a prominent tall brick tower with a golden spire on the left, and various buildings and a church with a tall spire on the right. The sky is a clear, pale blue.

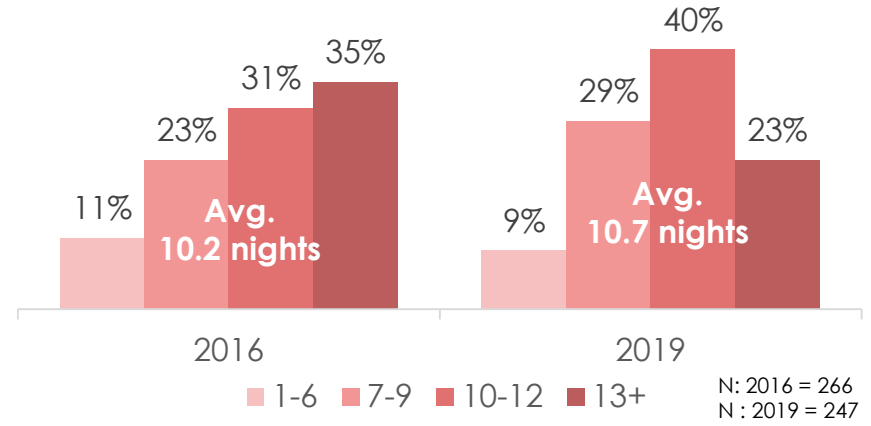
LENGTH OF JOURNEY

For the Chinese leisure travellers visiting Stockholm, the length of their entire trip in Europe is **10.7** nights. This is a small increase of 0.5 night compared to 2016.

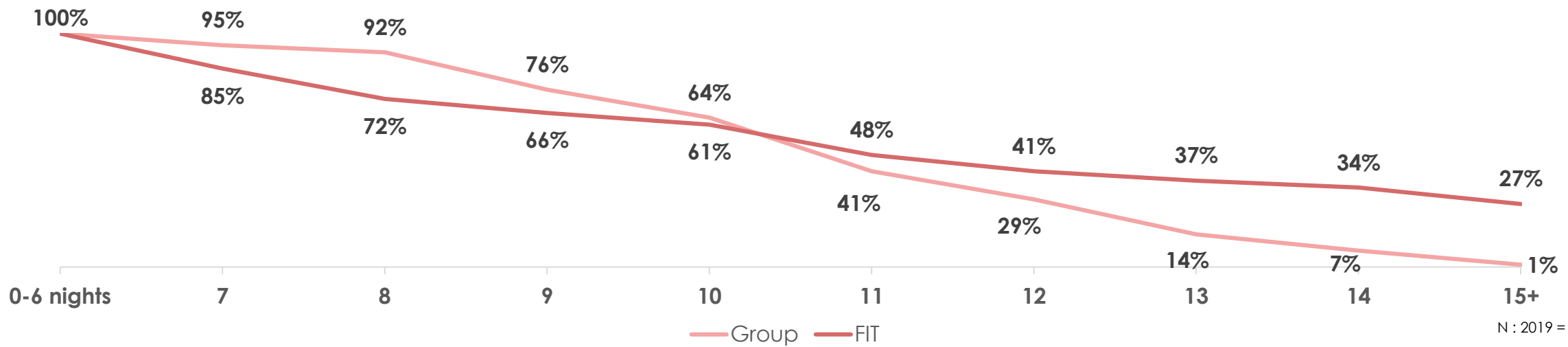
The difference between the average travel length of FITs (11.6 nights) and group travellers (10.1 nights) is 1.5 nights. This is an increase of 1.2 nights for FITs compared to the study from 2016. The group travellers have a similar length of stay as the one in the study from 2016.

More than one third of FITs (34%) stay in Europe for more than two weeks whereas this is only true for 7% of group travellers, who primarily stay a total of 10-11 nights.

Duration of entire trip to Europe



Duration of entire trip to Europe

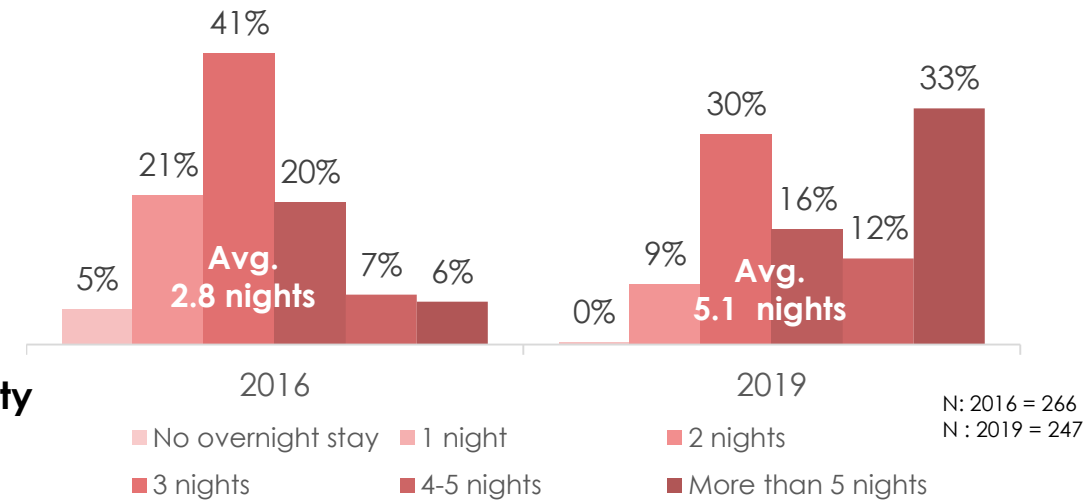


LENGTH OF STAY IN STOCKHOLM

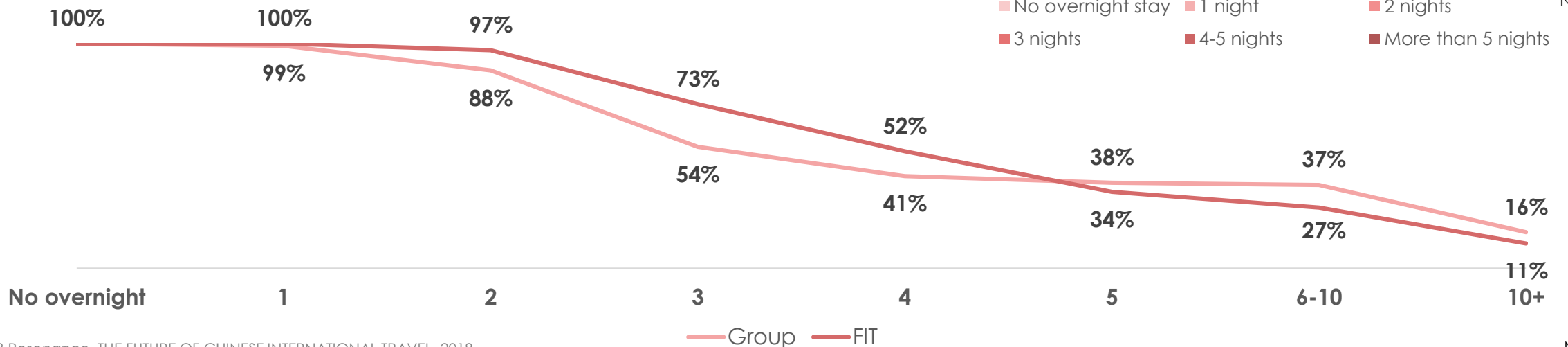
The number of nights the respondents are staying in Stockholm has increased considerably since 2016: From 2.8 nights in 2016 to 5.1 nights in 2019. In 2016 as few as 13% of the respondents stayed for 4 nights or more, today this number is 45%. However, there is a small difference between FITs (4.8 nights) and group travelers (5.2 nights).

These findings are not unique to this study, other research show a similar development in both the length of stay and the entire trip. This is a development that is expected to continue in the years to come³.

Duration of your stay in Stockholm



Length of stay in city



³ Resonance, THE FUTURE OF CHINESE INTERNATIONAL TRAVEL, 2018
McKinsey & Company, Chinese Tourists: Dispelling the myths, 2018
Hotels.com, Chinese International Travel Monitor, 2018

CITIES VISITED

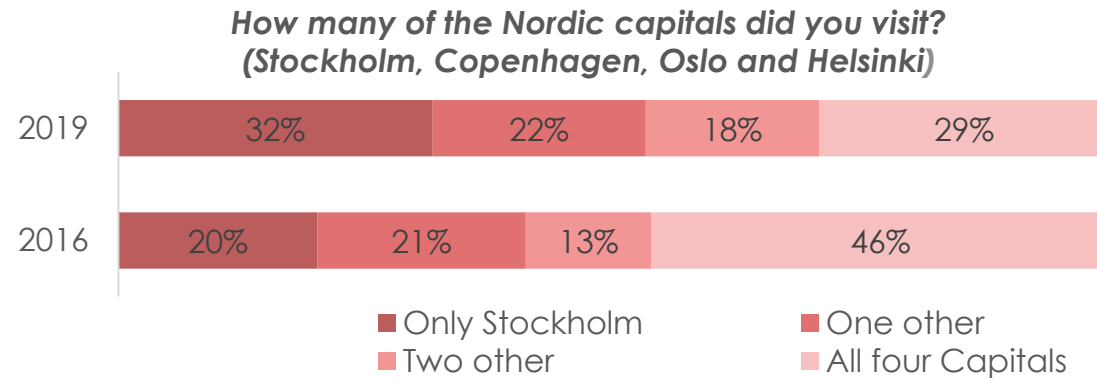
A majority of the Chinese travellers are still visiting more than one city when travelling to Scandinavia. However, even though the average length of the trip has increased, the number of cities visited have decreased.

The graph to the right shows the cities most travellers visit in combination with their trip to Stockholm. The three Nordic capitals, Oslo, Copenhagen and Helsinki, are still the most common cities to visit in combination with Stockholm.

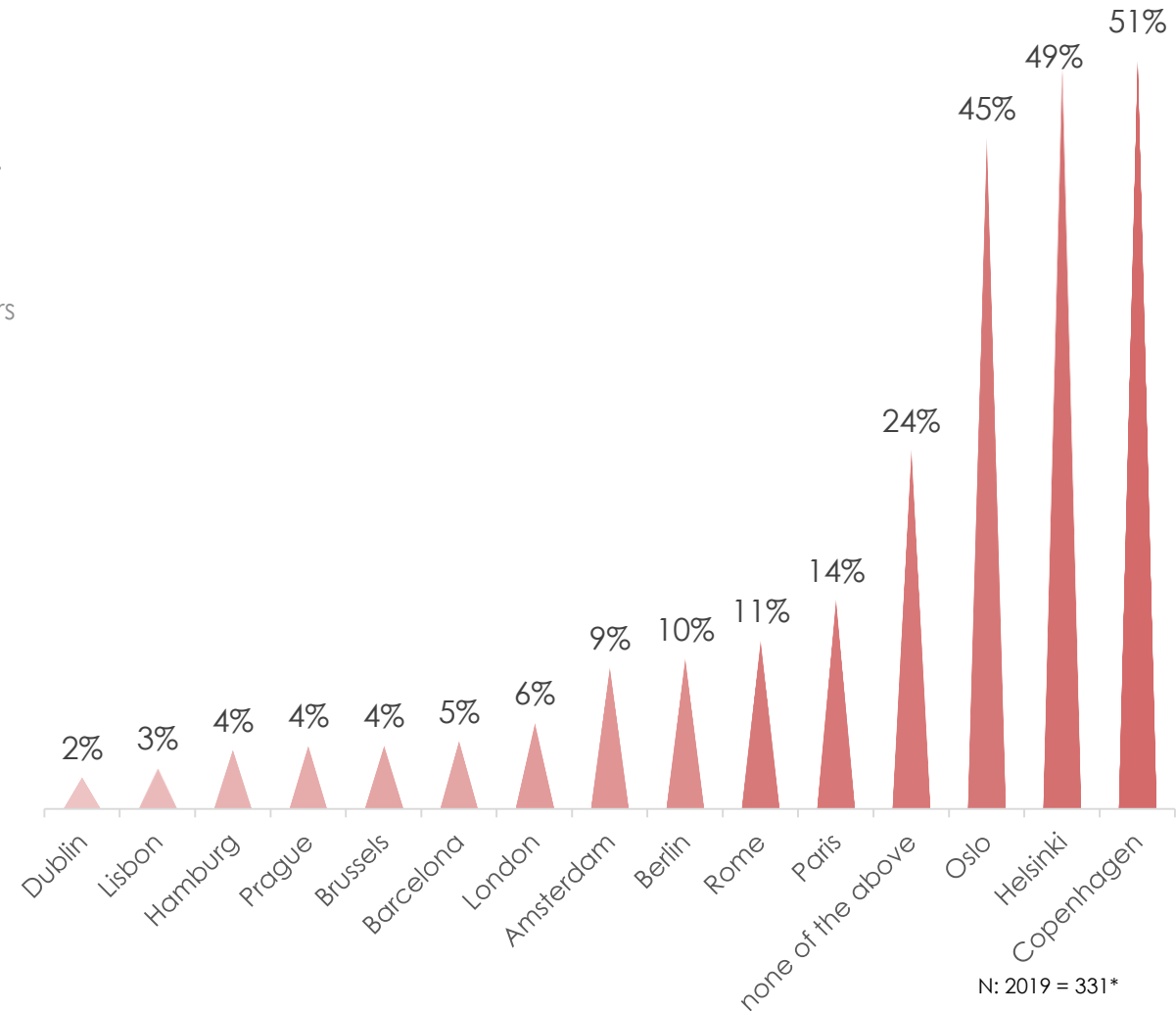
However, compared to 2016, fewer Chinese travellers are visiting all four capitals during the same trip. Thus, in 2016, 46% of the visitors travelled to all four, while in 2019, this number had decreased to 29%. The number of travellers visiting Stockholm exclusively has increased from 20% to 32%.

More than half of all group travellers visit all four Nordic capitals during the same trip. FITs on the other hand tend to only visit Stockholm (47%), and Stockholm and one more city (29%).

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



N: 2019 = 331
N: 2016 = 353



BEFORE THE TRIP



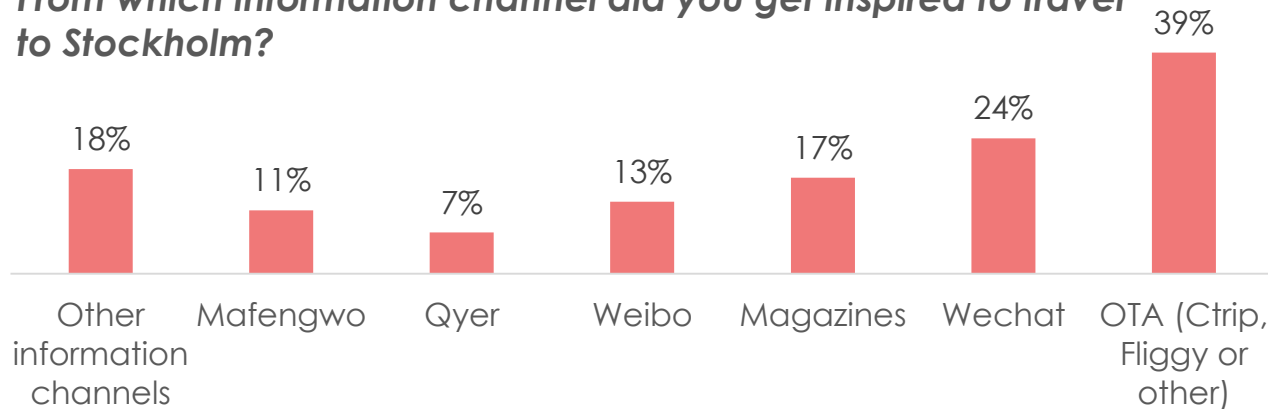
SEARCHING FOR INSPIRATION

Online travel agencies are the most used source of inspiration among the respondents. More than half of group travellers use online travel agencies (OTAs) as a source of inspiration when choosing to go to Stockholm. This is true for 1 out of 5 FITs.

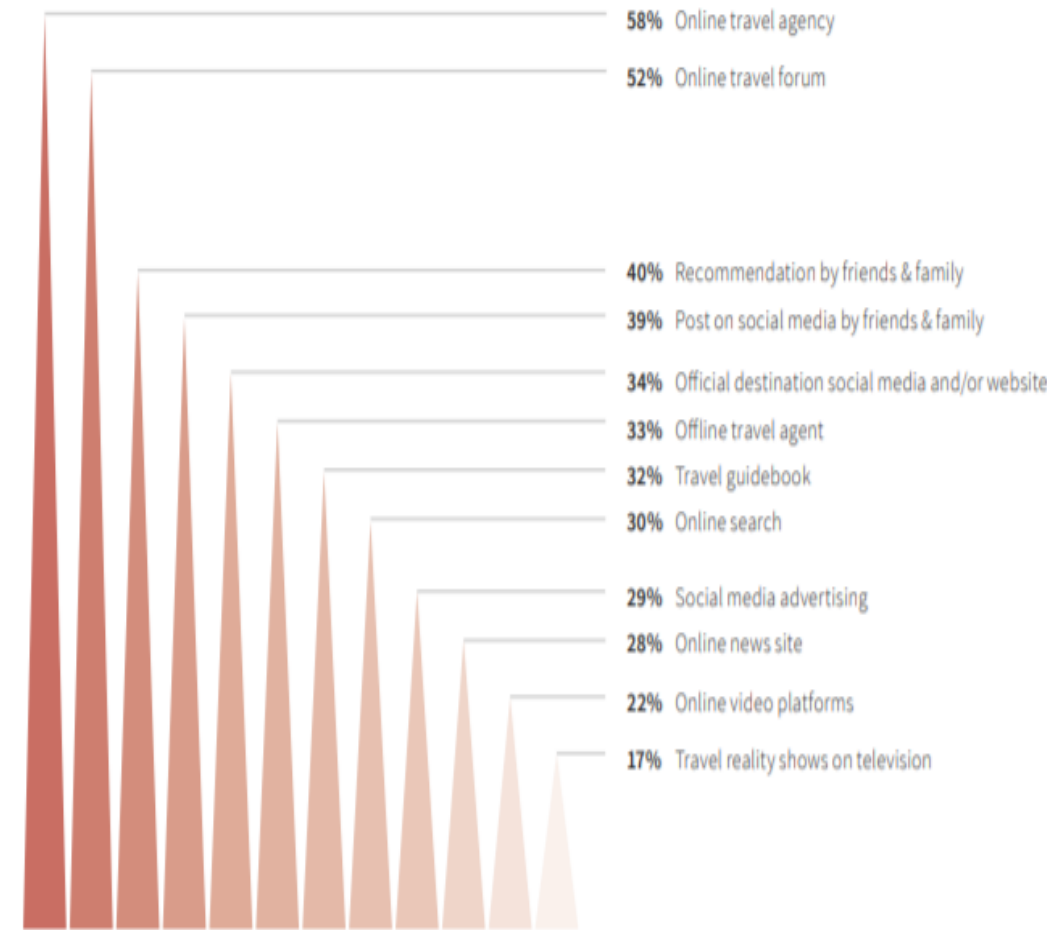
Besides OTAs, WeChat is the most widely used source of inspiration (24% across all respondents). 18% use other information channels, including friends, family or schools.

Results from an analysis made by Resonance, which is illustrated in the graph to the right, supports the notion that OTAs are the main source of inspiration. The research also highlights online travel forums, such as Mafengwo and Qyer, as important sources for inspiration when choosing a travel destination.

From which information channel did you get inspired to travel to Stockholm?



PRIMARY SOURCES OF INSPIRATION WHEN CHOOSING A TRAVEL DESTINATION



SOURCES OF INFORMATION

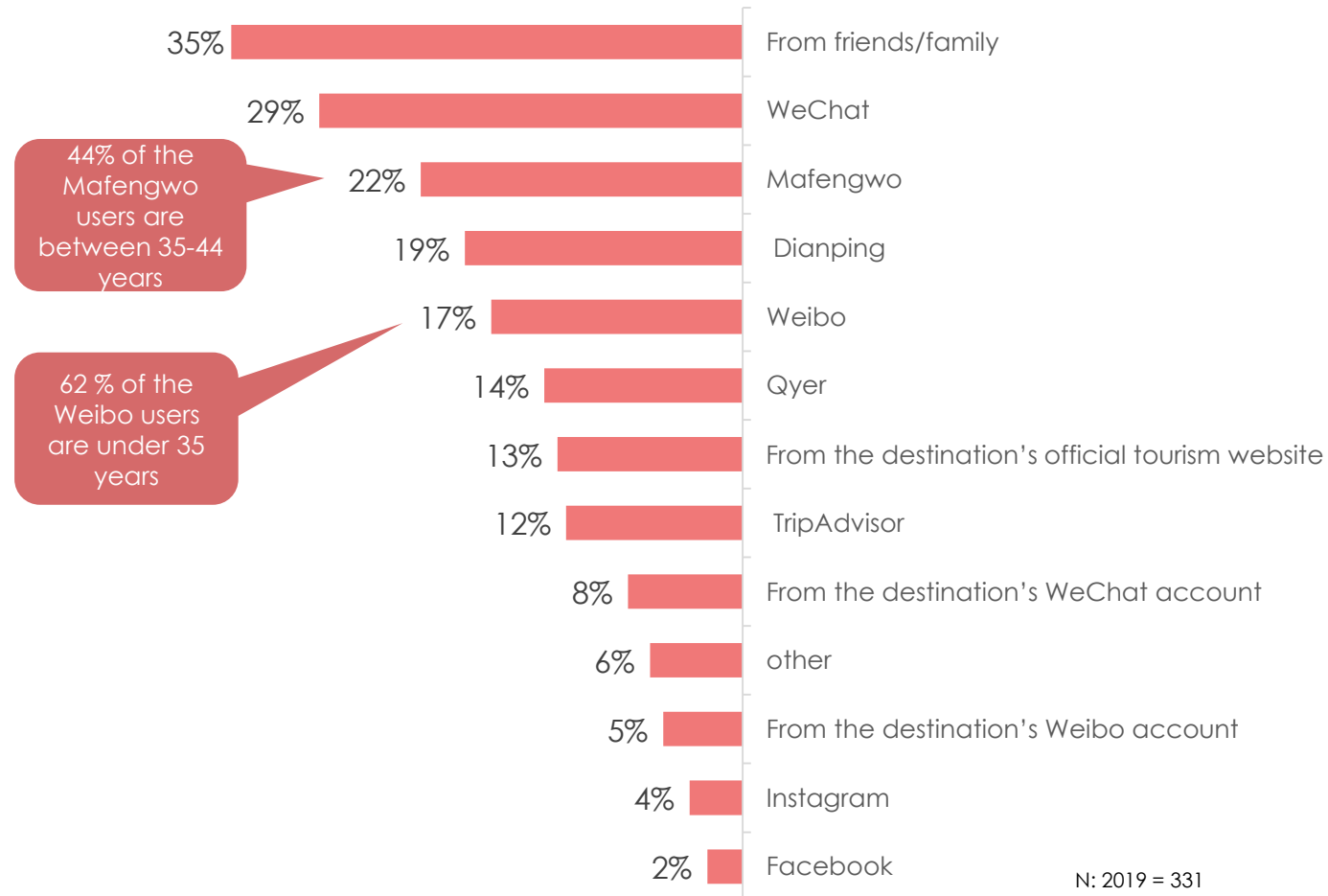
During their trips, many Chinese travellers rely on recommendations from friends and family as a source of information. This is true for both group travellers and FITs and across all age groups.

Looking at online platforms, WeChat is the most used source of information (27.5%). It is more frequently used by group travellers (36%) than FITs (23%) who prefer Mafengwo (31%).

Chinese travellers who use Facebook, Instagram and/or TripAdvisor are often under 45 years old (83%).

Results from the analysis made by Resonance (next page) shows Ctrip as the primary online platform for both booking the trip and searching for information. Ctrip is followed by Qunar and Tuniu. According to this research, Mafengwo is only used by 15% of respondents to book and search for information.

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

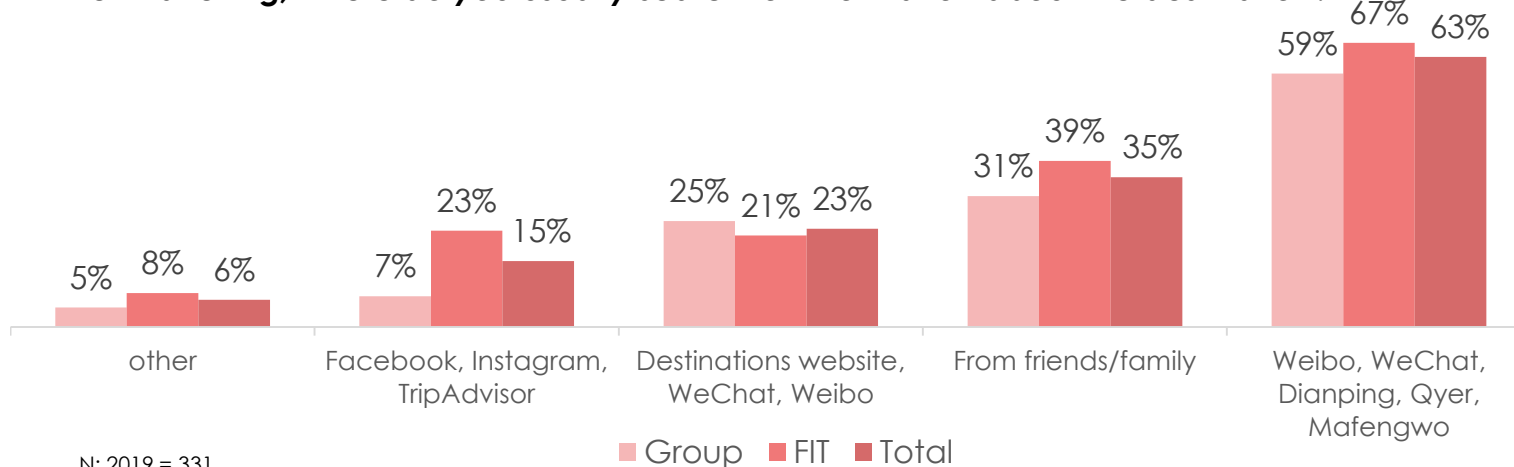


SOURCES OF INFORMATION

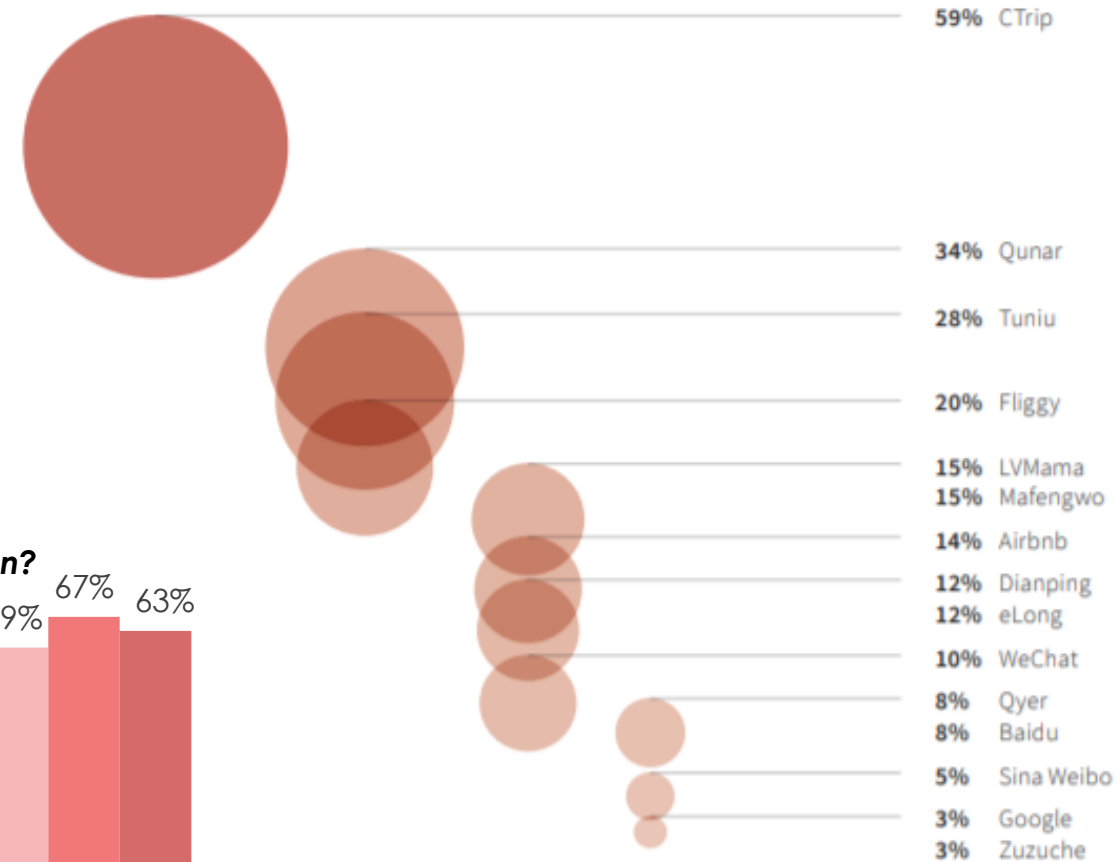
Chinese social media and travel platforms are used to search for information by 63% of the respondents.

- 35% of the respondents use either Mafengwo or Dianping.
- Online platforms with western origin is used by 15% of the respondents with TripAdvisor used by the most. 23% of FITs used these platforms compared to 7% of group travellers.
- The destination's official accounts are used by 23% with the website being the most used with 12% of the respondents.

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



PREFERRED ONLINE PLATFORMS FOR TRAVEL BOOKING AND RESEARCH

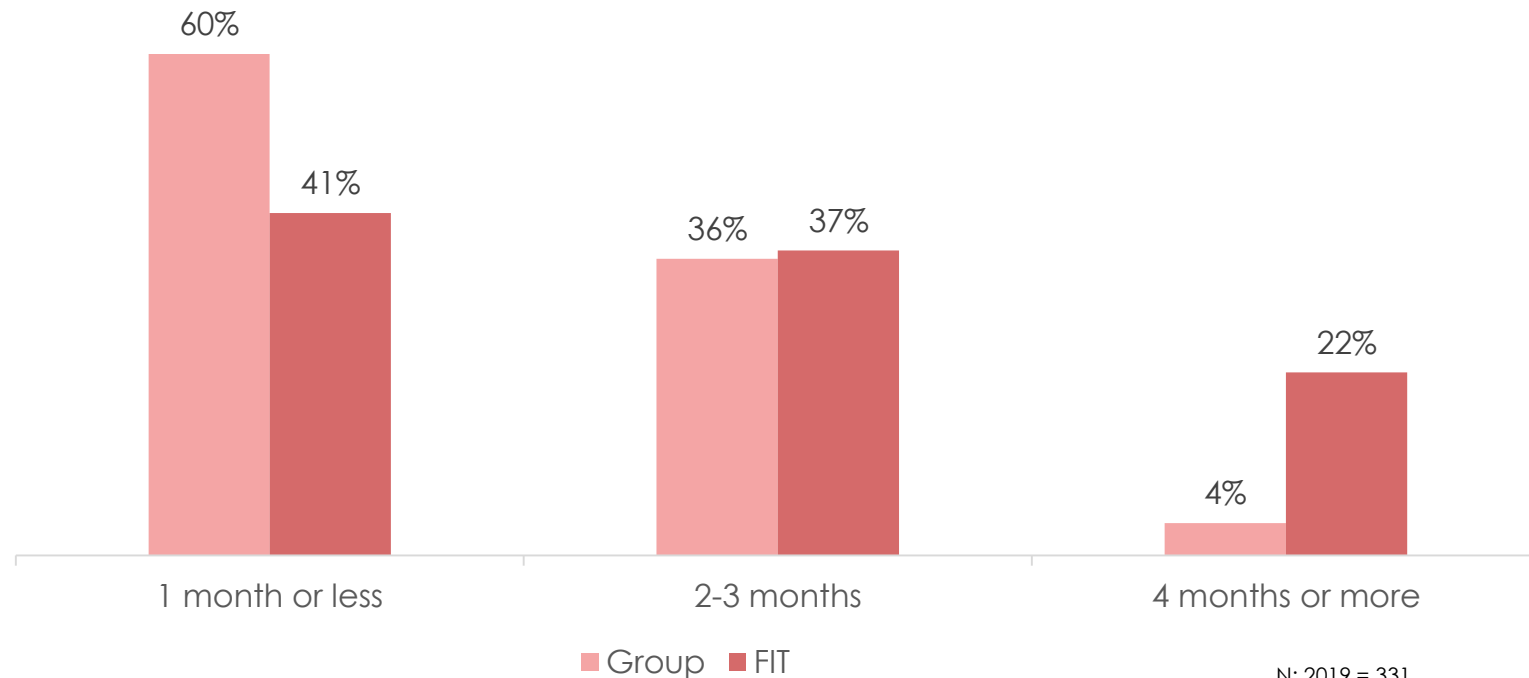
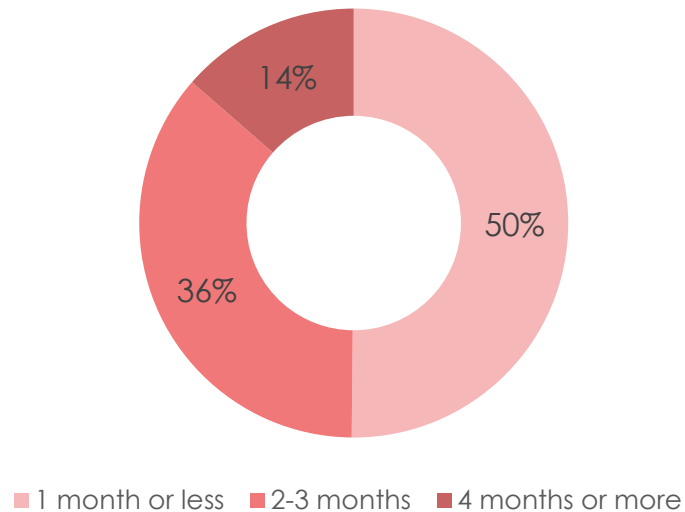


BOOKING

More than half of the respondents booked their trip less than a month before departure. Even though the decision to make the trip might have been made earlier on, they wait until they are relatively close to departure date before booking their trip. Only 11% book their trip four months or more in advance and of those more than 80% are FITs.

60% of the group travellers book less than one month prior to departure whereas only 41% of FITs book less than one month in advance. This is regardless of the age of the Chinese travellers.

How long before your departure did you book the trip?

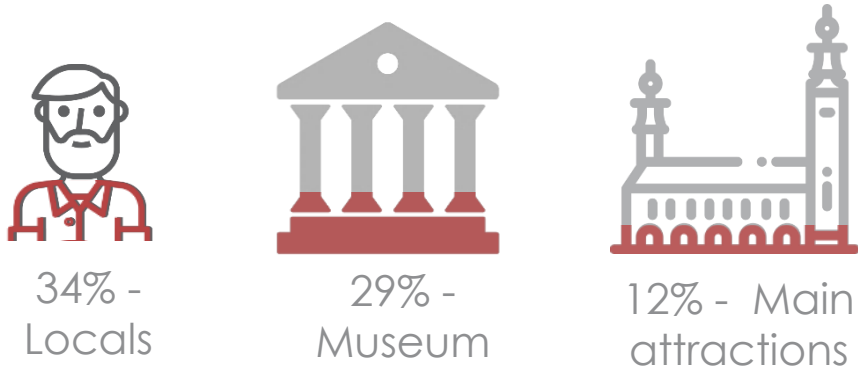


MOTIVATION FOR VISITING

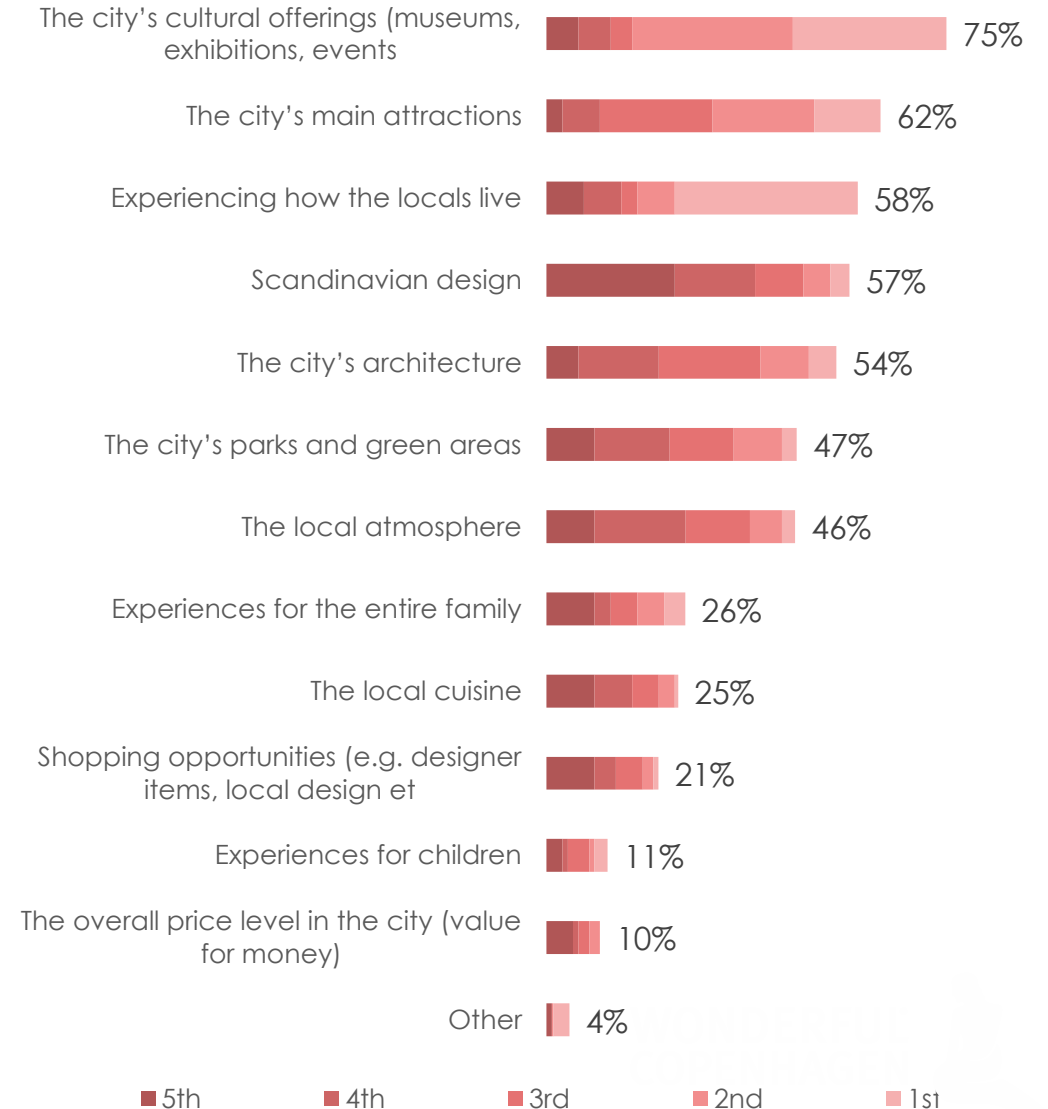
Three out of four Chinese visitors state that Stockholm's cultural offerings is one of the top five motivations for visiting the city. 29% even put it as their number one motivation.

More than half state that main attractions are a motivation for visiting Stockholm, though only 12% put it as their primary motivation. 34% claim that experiencing how the locals live is a reason for visiting the city. In contrast to the general perception of Chinese travelers, only 21% state that shopping is a key motivation for visiting the Nordic capital.


Selected as the primary motivation to visit Stockholm



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



THE STAY IN STOCKHOLM

A couple is seen from behind, riding bicycles on a wooden bridge. The bridge has a dark metal railing and a classic street lamp. The background shows a dense urban landscape of Stockholm buildings under a soft, golden sunset sky.

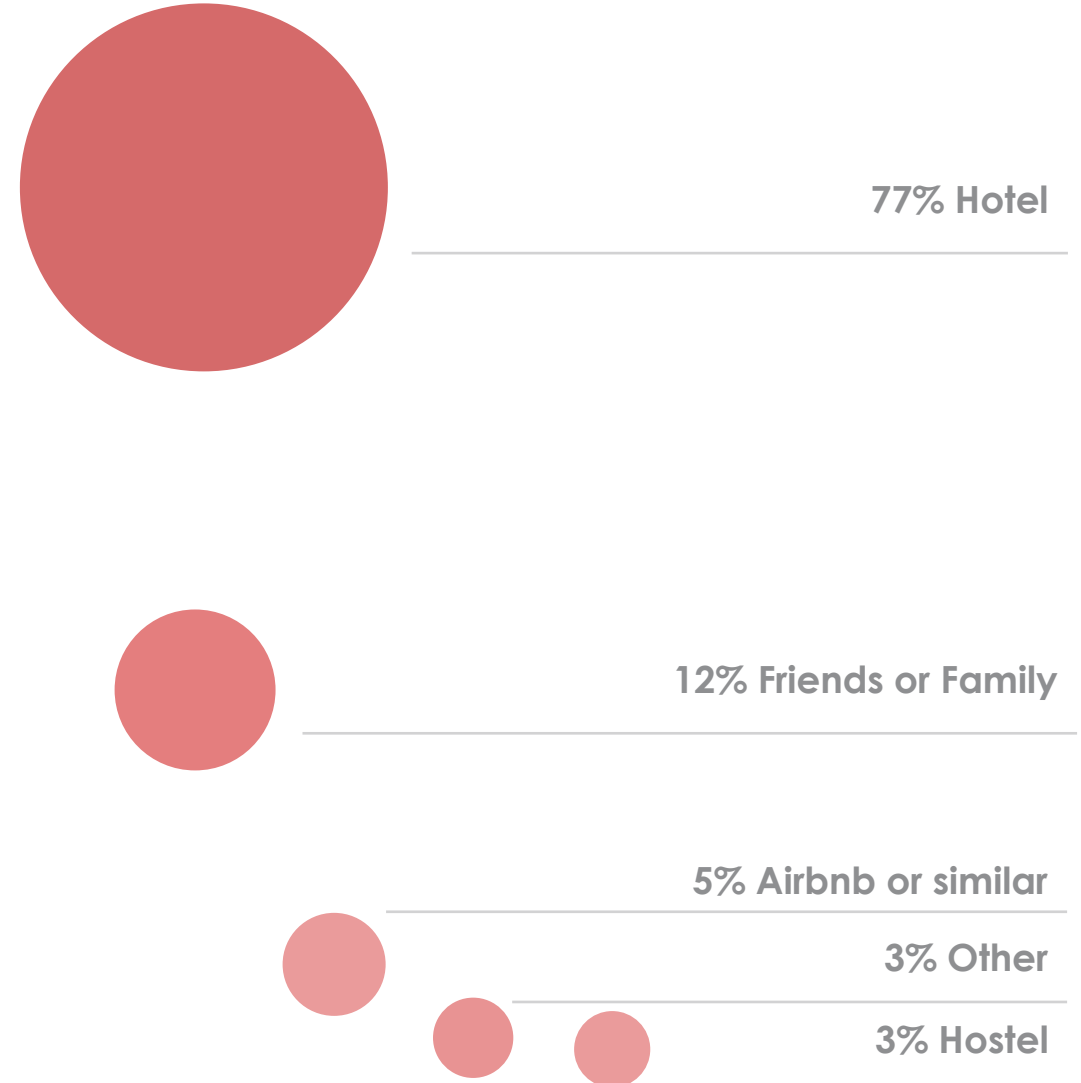
ACCOMMODATION

The preferred choice of accommodation is by far hotel (77%) Among the group travellers, hotels are the primary choice (95%) . In comparison, only 55% of FITs stay at a hotel.

Staying with friends and family is the second choice with 12% of respondents choosing this option.

Airbnb and hostels are a slightly more popular choices among the respondents below the age of 34. 12% of this age group prefer either hostels or Airbnb, while only 5% of the respondents over 34 years choose Airbnb or a hostel.

These numbers are almost identical to the study from 2016.



9%
of FITs stayed at Airbnb. In comparison, 1% of group travellers chose Airbnb.



25%
of FITs stayed with friends and family in comparison to 1% of group travellers.

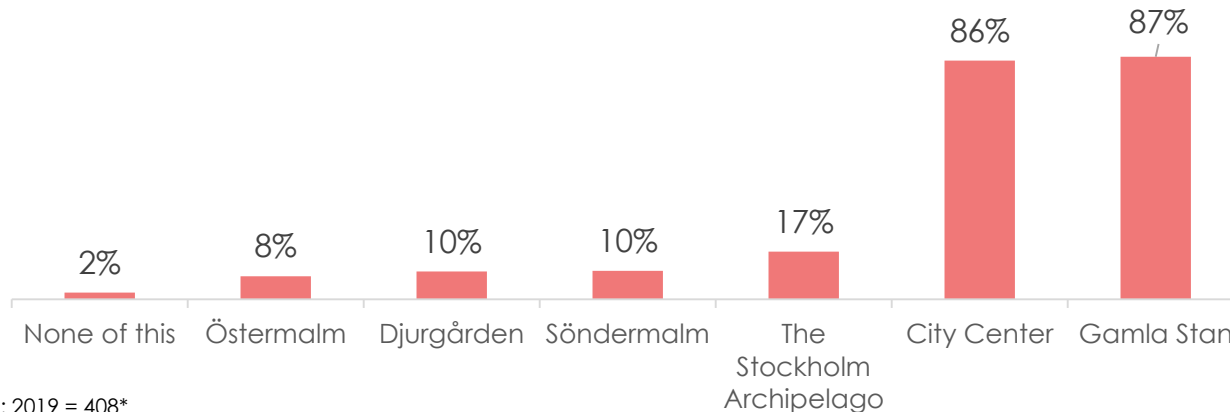
NEIGHBOURHOODS

The Chinese visitors were asked if they had travelled outside of Stockholm during their stay. Almost 60% of the respondents visited one of the cities (listed to the right) outside of Stockholm. 32% the respondents visited more than one of the cities outside of Stockholm. The most popular city to visit outside of Stockholm was Göteborg followed by Malmö and Linköping.

The visitors were also asked which neighbourhoods they had visited doing their stay in Stockholm. One out of five had only visited one of the selected neighbourhoods. Almost half had visited two neighborhoods during their stay in Stockholm. 30% had visited three or more neighbourhoods.

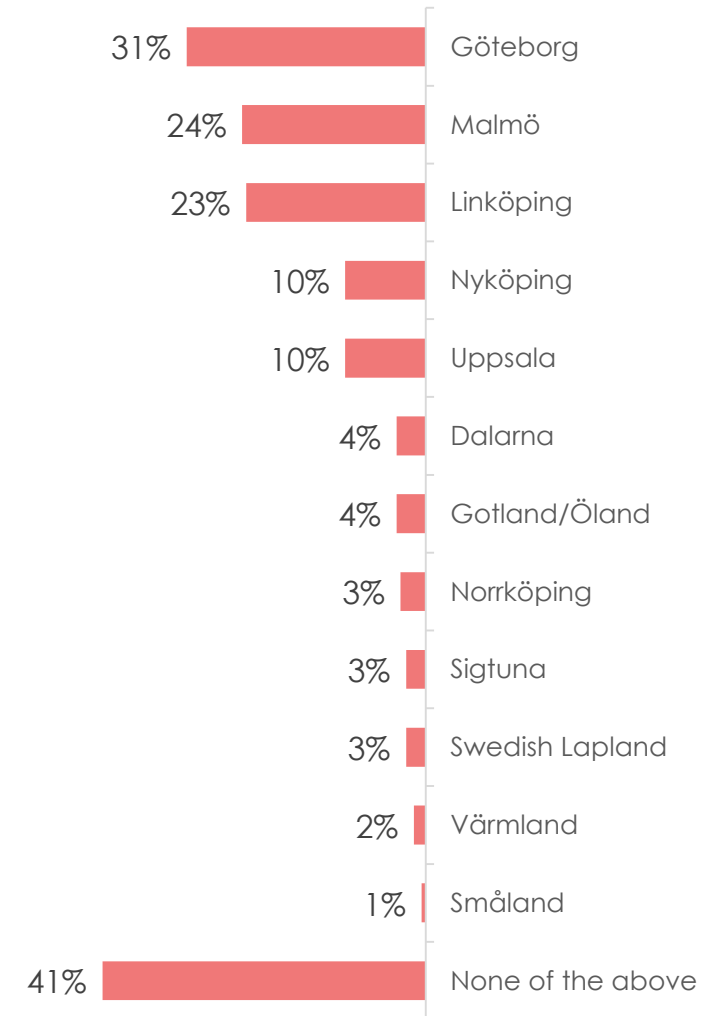
The most popular neighbourhoods to visit are Gamla Stan and City Center, which were visited by 87% and 86%, respectively.

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



N: 2019 = 408*

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



N: 2019 = 408*

VALUE FOR MONEY

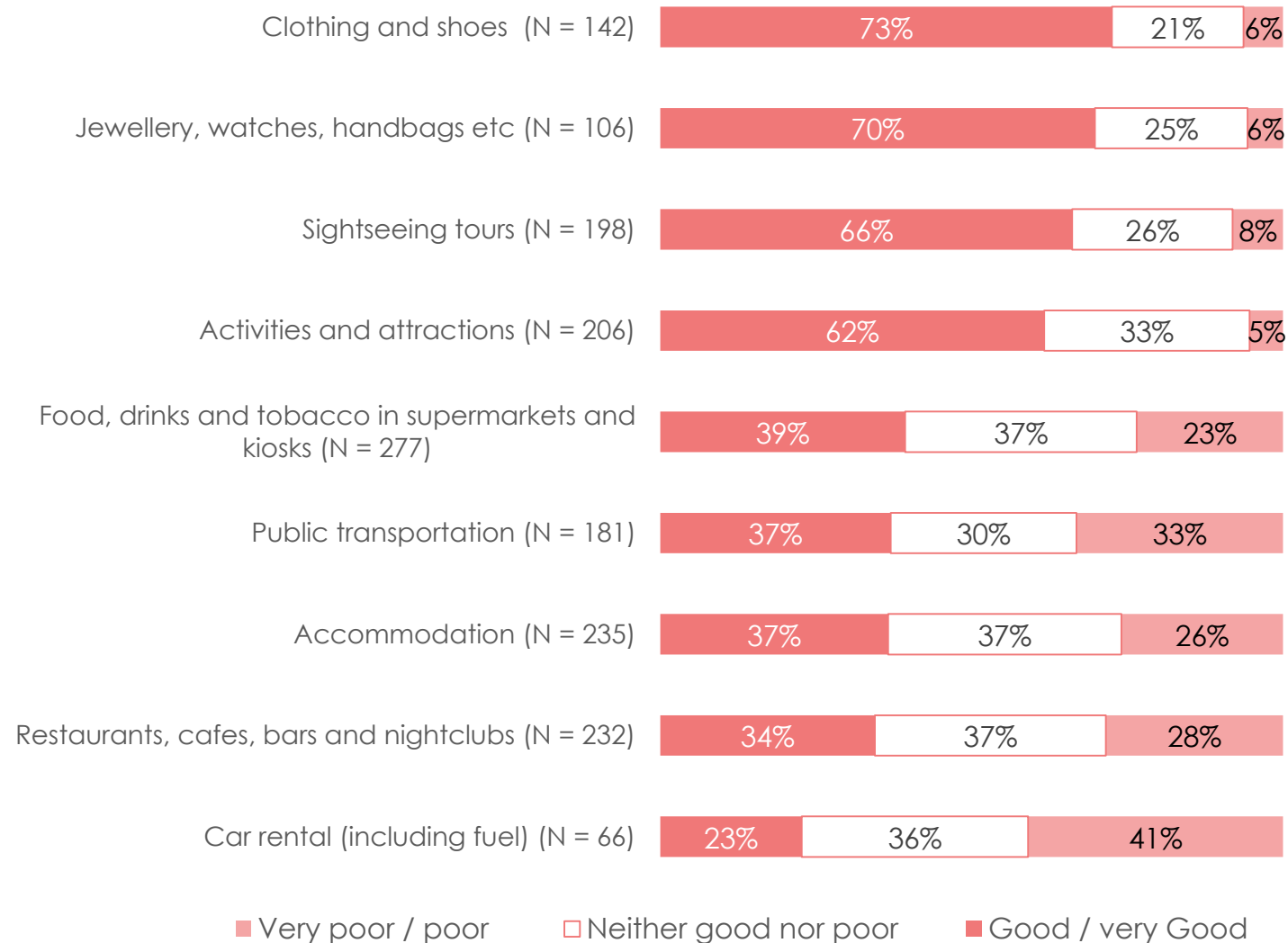
Looking at value for money, the respondents were asked to rate a number of categories.

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. 70% or more have rated these two categories as ‘good value for money’.

The two categories are followed by “Sightseeing tours” and “Activities and attractions”, which more than 60% believe offer good value for money. These results are similar to those in Copenhagen.

The “Car rental” category has the highest percentage of respondent who have rated it as ‘poor/very poor value for money’. It is, however, also the category with the fewest respondents.



EXPECTATIONS

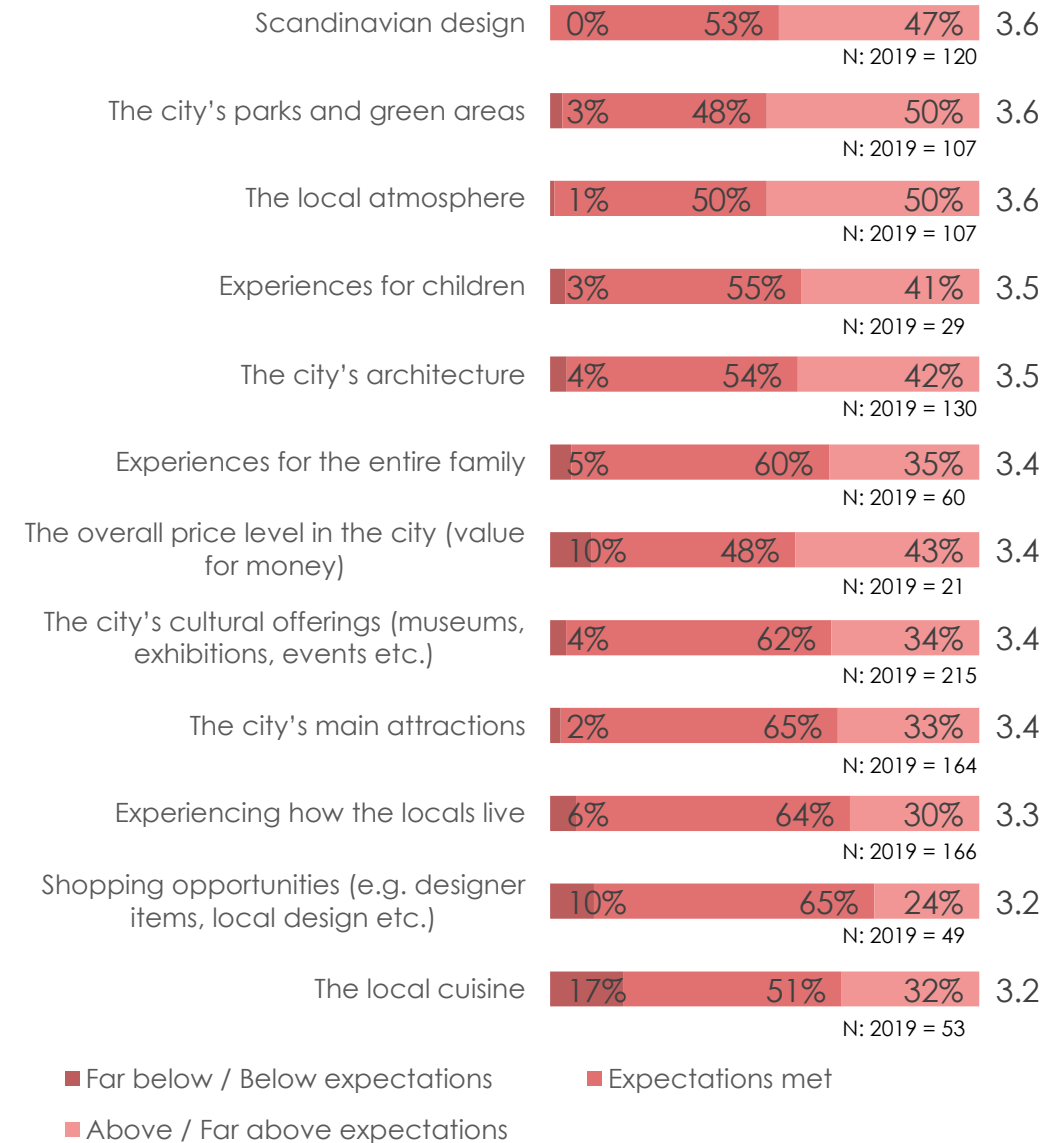
The respondents were also asked as to what extent different aspects of their Stockholm visit met their expectations.

Overall, expectations were met with many of the experiences rated as 'above expectations'. This applied particularly to the categories "Scandinavian design", "Green areas" and "The local atmosphere".

The category with the lowest average value was "The local cuisine", which also had the highest percentage of respondents rating the experience as 'below expectations'.

It is worth noting that the main motivational factors for traveling to Stockholm, i.e. the city's main attractions, cultural offerings and experiencing how the local lives, are all met to a great extent with only 4-6% feeling that the expectations were not met.

To what extent did your stay in Stockholm live up to your expectations for each of these aspects?



SPENDING FOR LEISURE TRAVELLERS

The average daily spending for Chinese leisure travellers is 3,087 SEK.

The category where the respondents spent the most was “Jewellery, watches, handbags etc.”. This category accounts for 24% of the total daily expenditure despite the fact that only 30% of the respondents spent money on these items

If the “jewellery, watches, handbags etc.” category is removed from the calculations, the average daily expenditure is reduced to 2,335 SEK.

“Accommodation” makes up the second highest share of the daily expenditure (19%), followed by purchase of “Clothing and shoes” (13%) and “food, drink and tobacco” (12%).



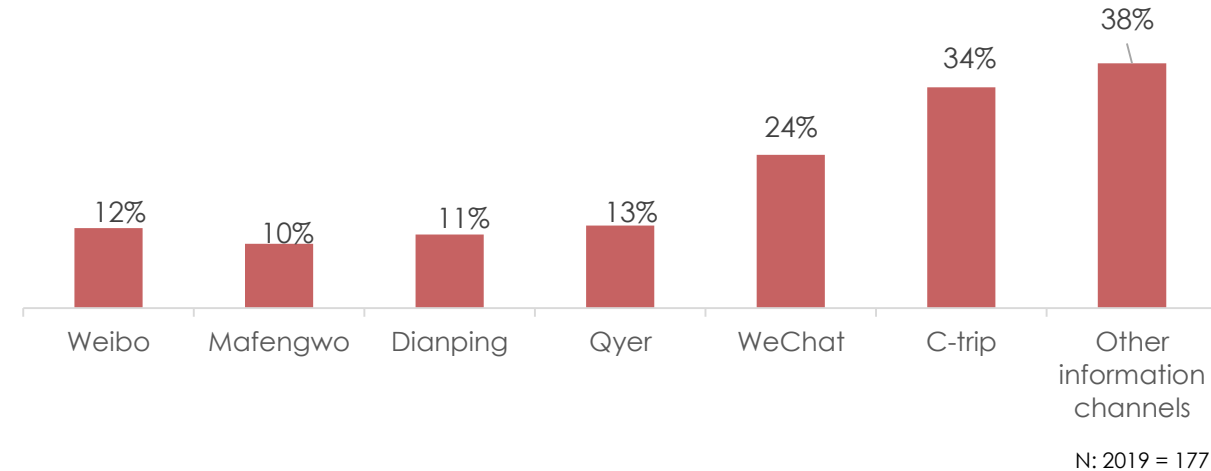
Jewelry, watches, handbags etc.	24%	753 SEK
Accommodation	19%	591 SEK
Clothing and Shoes	13%	395 SEK
Food, drink and tobacco	12%	383 SEK
Other expenses	11%	337 SEK
Sightseeing and tours	7%	222 SEK
Restaurants cafes	6%	185 SEK
Activities and attractions	4%	129 SEK
Car rental and fuel	2%	51 SEK
Public transportation	2%	42 SEK

ARLANDA AIRPORT

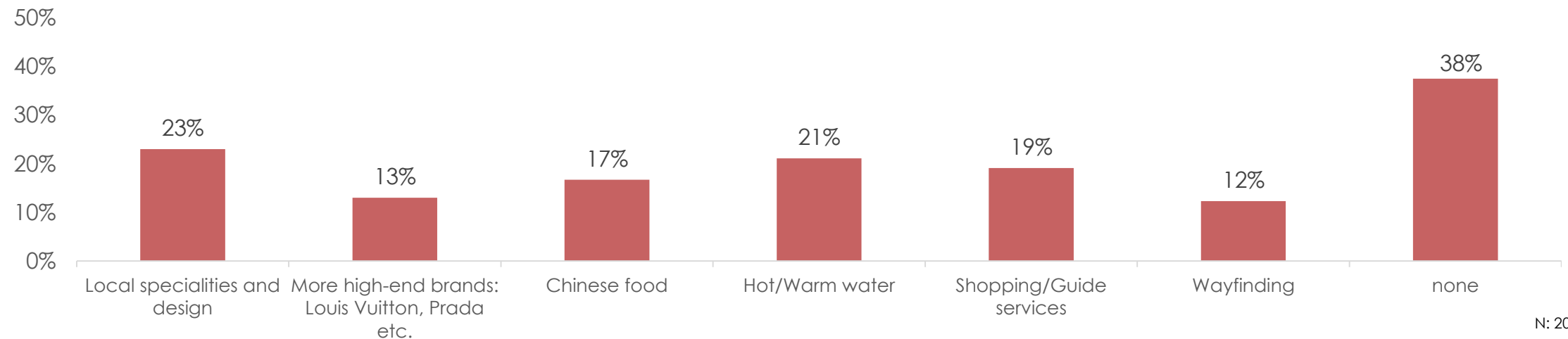
The Chinese travellers were asked whether they searched for information about Arlanda Airport before their arrival. 52% of the respondents did search for information prior to their visit, while 34% used Ctrip, 24% used WeChat, and 38% used other information channels. Although they did not state which other information channels they used, it is likely that they used the Arlanda Airport website.

The respondents were also asked if they thought any products or services were missing at the airport. 38 % of the Chinese visitors did not think this was the case. The group of travellers who thought that there was a lack of products noted that it was in particular local specialties, design products and hot water that were missing at the airport.

Where have you searched for information about Arlanda Airport?



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



AFTER THE VISIT



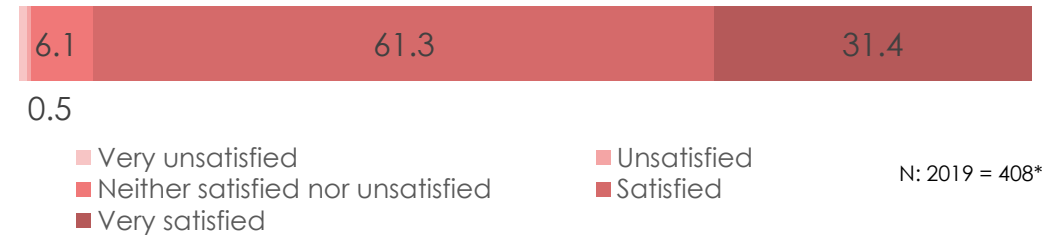
SATISFACTION WITH STOCKHOLM

Overall, the Chinese visitors were very satisfied with their stay in Stockholm. 92.7% stated that they are satisfied or very satisfied with their stay. This goes for all age groups.

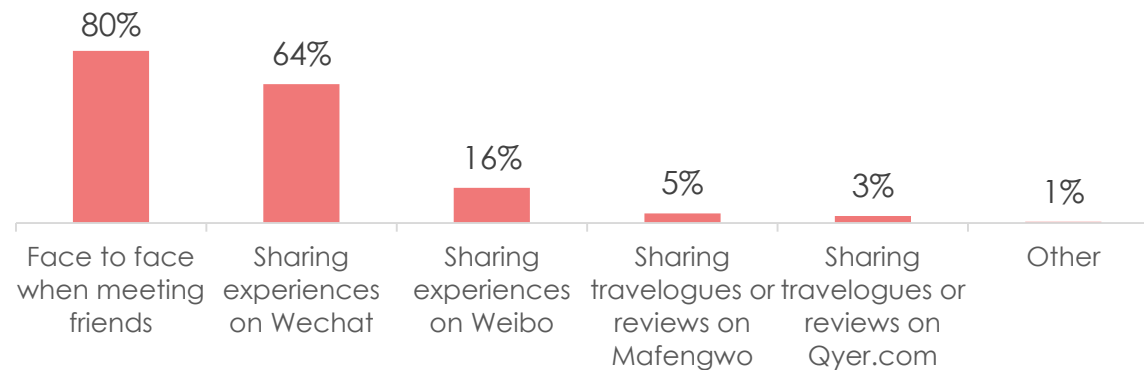
When asked how likely it is that they will recommend Stockholm as a leisure destination, less than half (42%) answered that they are very likely to recommend the destination. This is equivalent to an NPS score (a measure for the respondents' willingness to recommend the city) of 23.

For the travellers who will recommend the destination, 'word of mouth' was the preferred method stated by 80% of respondents. 64% would share their experience and recommend Stockholm using the Chinese social media platform WeChat.

How satisfied are you with your stay in Stockholm?

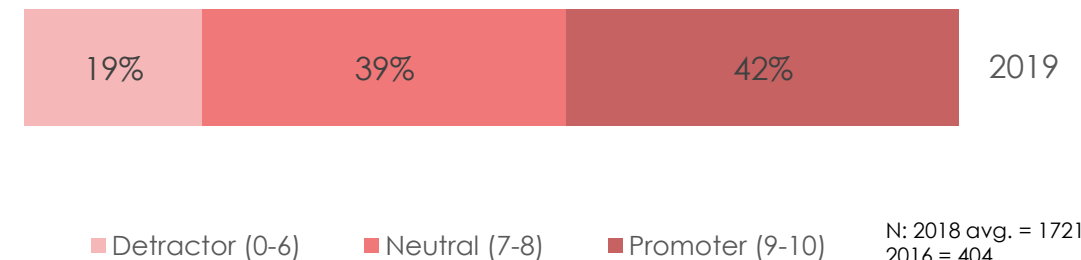


How would you recommend Stockholm?



N: 2019 = 331

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



THANK YOU

Write me at mbf@woco.dk