Survey of Chinese visitors to Scandinavia

Perspectives for Scandinavian city tourism

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by Wonderful Copenhagen
Research & Development
Flying the Dragon, while avoiding its burn...

China’s outbound travel market is growing exponentially while Europe’s economy and consumption are stagnating. China’s middle class is on the rise and with 80+ mio. outbound travellers in 2012, Chinese tourists are quickly becoming the travel industry’s number one growth segment. The rapid development and huge potential of the Chinese source market have also been felt in Europe, where European cities across the continent have seen an average of two digit annual growth rates in Chinese bednights since 2007, skyrocketing from 2009 onwards and surpassing an average annual growth of 30% in 2011.

But with this impressive growth comes more than just numbers. Tourism creates jobs, builds relations – politically, culturally and economically. Tourism connects companies, schools, universities, organisations and governments and most importantly: People.

That’s why China’s outbound travel market is a must-win battle for Scandinavia. And that’s why the Chinavia project was launched in 2012 in collaboration between Wonderful Copenhagen, Göteborg & Co, Stockholm Visitors Board and Helsinki Tourism & Congress bureau. The aim of the project is to gain a deeper insight into the Chinese travel market, the preferences of the modern Chinese travellers and the performance of our destinations in serving them.

The project has accomplished all of this and hereby presents one of five market studies all documenting the vast potential promised by the Chinese market and the great affection many Chinese visitors have for Scandinavia. But the studies also identify Scandinavia’s common challenges in gaining attention and visibility in the digitalized Chinese travel market and difficulties of engaging in dialogue with the Chinese netizens. Another main alert is the fact that the welcoming and service of Chinese tourists in our cities need to be much better if we are to sustain or even gain market share in the fierce competition with continental destinations.

In this report we present the results of a visitor survey which was carried out in August 2012. As the first of its kind, the visitor survey provides entirely new knowledge and insights into the travel experience and preferences of 678 Chinese visitors in Copenhagen, Stockholm and Helsinki.

The Chinavia pilot project has been managed and executed by Wonderful Copenhagen in close cooperation with the project partners. All elements of the Chinavia research package are made publicly available with thanks to the project partners and gratitude to the many Chinese visitors who participated.

In the spirit of sharing, we hope, you will find this report informative and useful.

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Chinese visitors to Scandinavia have great affection for Scandinavian cities. The attraction lies in the serenity and tranquility of Scandinavian cities and scenery, the green and relaxed urban atmosphere and the history of the city destinations. Yet it is difficult to be Chinese in Scandinavia as especially language barriers inhibit the Chinese visitors from exploring freely and fully. As China is fast becoming the biggest source market for global tourism, and Scandinavian city destinations are experiencing rapid growth in Chinese bednights, there is an urgent need to prepare destinations for this new market. This survey of 678 Chinese tourists in Copenhagen, Helsinki and Stockholm, performed in August 2012, provides new insights into the Chinese visitors, their travel preferences and itineraries, their experience of Scandinavian cities and how Scandinavian destinations can improve their products and services to the new Chinese visitors.

Profiling the Chinese visitor
The below paragraphs outline the main survey results concerning the profile of the Chinese visitor to Scandinavia.

Highly educated visitors
The Chinese visitors are highly educated. 79% of the 678 surveyed Chinese visitors have a college degree or a higher education.

Insecure English speakers
Despite the high educational level, the majority of Chinese visitors are insecure English speakers. 59% of the 678 Chinese visitors surveyed rate their English as either broken or non-existent. In Copenhagen, the insecure English speakers amount to 72% of surveyed Chinese visitors.

More visitors of 35+ years travel in tour groups
The Chinese visitors mainly fall within a large working age span of 25-54 years. Within this age span, however, there is an indication that visitors of 35 years or more show a higher propensity to travel in tour groups, whereas the younger (age 34 or below) are more likely to venture into independent travel.

Mainly from China’s big cities
The Chinese visitors come from all parts of China, yet with the biggest share originating in either one of the two largest cities; Beijing and Shanghai. Though the general geographical distribution of visitors is very similar between the three Scandinavian cities of the survey (Helsinki, Stockholm and Copenhagen), Copenhagen sees a considerably larger share of visitors.
from Shanghai than Stockholm does, which is most likely explained by the direct flight connections. Meanwhile, Stockholm sees a larger share of visitors from the inner Western regions and from Hong Kong and Taiwan.

**Travel preferences and itinerary of the Chinese visitors**

In the below paragraphs we outline the overall travel preferences and travel itineraries of the 678 Chinese visitors surveyed.

**Chinese visitors are on holiday**

54% of the 678 Chinese visitors surveyed are travelling for holiday. As Copenhagen sees a larger share of tour group travellers, 67% of surveyed visitors in Copenhagen are leisure travellers. Helsinki sees the largest share of business travellers (25% against 14% and 9% in Stockholm and Copenhagen respectively), while 23% of Chinese tourists surveyed in Stockholm travel to visit friends and family (against 11% and 7% in Helsinki and Copenhagen respectively). As the survey was carried out in August 2012, the main season for summer holidays in China, this could also have influenced the distribution of visitors’ travel purposes.

**Travelling mainly by tour group**

Despite differences in purpose of travel, an average of 59% of the Chinese visitors surveyed travel as part of a tour group. Copenhagen takes the lead on tour groupers with as much as 82% of respondents travelling in a tour group, whereas half of respondents in Helsinki are travelling by tour group and only 39% in Stockholm. This higher share of tour groupers among respondents in Copenhagen could be related to the timing of the survey (beginning of August in Copenhagen, whereas the survey was carried out later in August in the other two cities).

**Short stays of 0-2 nights**

The Chinese tourists have very little time in each city. 63% stay for between 0-2 nights in the city of survey. The tour group travellers stay for the shortest period of time; 76% of tour groupers stay between 1-2 nights. Meanwhile, the independent travellers (travelling outside a tour group) stay longer with 45% staying for more than 5 nights (against only 4% of the tour group travellers).

**1st timers to Scandinavia**

The Chinese visitors have little previous experience with the Scandinavian destinations. 79% are visiting
Scandinavia for the 1st time. For 54% of the visitors, Scandinavia is also the 1st encounter with Europe.

84% of Chinese visitors are touring several countries
The majority of Chinese visitors (84%) go to more than one country during their trip. Looking at the distribution of tour group travellers vs. independent travellers, 95% of Chinese tour group travellers visit several countries on their trip, while only 68% of the independent travellers visit more than one country.

Very few exclusive visits
Very few Chinese visitors come to Copenhagen and Denmark exclusively. Only 7% of the surveyed tourists stay exclusively in Copenhagen, while the same for Stockholm and Helsinki amounts to 23% and 21% respectively.

Touring Scandinavia exclusively
Meanwhile, a large share of Chinese visitors (71%) are touring Scandinavia exclusively; including the 4 Scandinavian countries and Iceland. Of the 3 surveyed cities, Helsinki is the one most frequently combined with other non-Scandinavian destinations.

Shopping according to plan
Chinese are recognized as big global shoppers – and the Chinese visitors surveyed in Scandinavia are no exception. 64% confirm having a shopping itinerary for their trip. This is the case almost regardless of whether the visitors are travelling as part of a tour group or not; 67% of tour group travellers have a shopping itinerary against 59% of the independent travellers.

Travel itineraries: Touristy things
The travel itineraries of Chinese visitors surveyed primarily involve so-called mainstream tourist activities – visiting tourist attractions (90%), visiting museums and exhibitions (57%) and 51% shopping for souvenirs.

Tourist classics vs. explorers
The results show that there is a difference in activities between tour group and independent travellers. Where the tour groupers mainly concentrate on the known (61% eating Chinese food while travelling and 41% eating either local or international food), the independent travellers are more likely to explore local or international specialties (77% eating either local or international food while travelling).
Travel planning by the Chinese visitors
Below we summarise the main results of the visitor survey in relation to how the 678 Chinese visitors plan and prepare for their trip to Scandinavia.

Chinese visitors plan their trip online
The Chinese visitors turn online when researching their trip to Scandinavia. Looking at the differences in research topics between independent travellers and tour group travellers, the independent travellers do more research on flight and accommodation. 59% and 46% of independent travellers research flights and accommodation, respectively, against 21% and 22% of tour group travellers. However, both groups research information on shopping (29% of independent travellers and 27% of tour group travellers) and information on other activities (food, drinks, exhibitions etc.), namely 56% independent travellers and 52% tour group travellers.

67% of Chinese visitors have a social media profile
Much like the rest of China’s (especially urban) population, the Chinese tourists travelling Scandinavia are social netizens. 67% have social media profiles and the majority are on Chinese social sites, especially Weibo and Renren.

Sharing the travel experience online
Of the 67% with a social media profile, 67% plan to share their Scandinavian experience online by posting pictures from the trip.

Using their smart phones while travelling
78% of the Chinese tourists surveyed confirm having a smart phone. 82% of them used it while here and 44% downloaded APPs related to their stay in Scandinavia, mainly for wayfinding or translation.

Expecting Scandinavia to be green, clean and relaxed
The results show that Chinese tourists have a concerted expectation to Scandinavian cities involving the keywords: green, clean and relaxed.
Chinese visitors’ Scandinavian experience
The main findings in terms of best and worst experience of the 678 Chinese tourists surveyed in Scandinavia are outlined below.

The best of Scandinavia: Historical & famous sites
The Chinese tourists are most satisfied with the historical and famous sites of Scandinavia. In addition, the experience of local culture and the time to relax are also rated satisfactorily by the surveyed tourists.

The worst of Scandinavia: Lack of Chinese information
Across the three cities, the elements receiving the lowest score of satisfaction are all related to the provision of Chinese information – whether through city websites, through brochures and maps, through mobile APPs or the availability of Chinese-speaking service personnel.

Experience Scandinavia to broaden and ease the mind
Across the three cities, Chinese visitors express their motivation to broaden the mind by experiencing the foursome of Scandinavian countries. The overall narrative of Scandinavia as a place of harmony and tranquility also offers an escape from the busy everyday life. While Copenhagen is considered historical and a shopping heaven, Helsinki is commended for its purity and civilization, and Stockholm for its friendly people and convenient transportation.

Lack of Chinese information and poor service
Overall the Scandinavian cities are considered inconvenient due to lack of available Chinese information, poor Chinese food and lack of Chinese-speaking personnel. In addition, the quality of service is poor and several visitors point to very specific incidents of poor service treatment. Copenhagen is also criticized for its dirty and messy streets. This stands in contrast with the expectations to Copenhagen as green and clean, which could also explain why respondents specifically highlight this as their worst experience. Meanwhile, several of the surveyed Chinese visitors point to Helsinki as too slow-paced and Stockholm as too expensive.
The results of the Chinese visitor survey point out a clear direction for Scandinavian cities to follow in order to improve their communication with and welcome of Chinese visitors. The results provide new knowledge of the travel preferences, experiences and demands of the Chinese travelers, allowing Scandinavian cities to better adapt and target their products and services to this new and growing market. Based upon these results, we summarize three overall recommendations to the Chinavia cities related to 1) establishing an online presence, 2) making Scandinavian destinations accessible and convenient to the Chinese-speaking visitor and 3) improving the service experience of Chinese visitors. The overall perspectives and recommendations are outlined below.

The starting point of Chinese visitors
The visitors are well-educated, urban Chinese citizens. They are insecure English speakers and prefer to travel within the safety of a tour group, touring several Scandinavian destinations in one trip. The visitors have very little Scandinavian and even European travel experience. However, the survey results also indicate that with travel experience follows the propensity to travel more independently and staying longer.

Turning online for planning
Regardless of whether they are travelling in tour groups or independently, the Chinese visitors turn online to prepare their trip to Scandinavia, looking for information through China’s online platforms on what the Scandinavian cities have to offer.

Sharing the experience online upon return
During their travel or upon return to China, the Chinese visitors share their actual experience online, contributing to the re-generation – or if disappointed the de-generation – of the Scandinavian narrative online in China. Scandinavian destinations need to understand this narrative and actively contribute to shaping the Scandinavian narrative on China’s internet through a strong online presence with targeted Chinese travel information and inspiration.

Recommendation:
• Provide targeted Chinese information and inspiration on the preferred Chinese online platforms.
China’s online users generally place strong trust in online recommendations made by online peers or key opinion leaders. Scandinavian destinations can tap into the potential of Chinese Word of Mouth between the 500+ mio. Chinese internet users. By establishing a strong and interlinked online presence in China, Scandinavian city destinations can build a platform with inspiration for the indecisive and potential visitors, with targeted and relevant information for the planning visitors and with a forum to share experiences for the returned visitors (and potential 2nd, 3rd and 4th time return visitor).

**Understanding the expectations and experiences of Chinese visitors**

The answers to both the closed- and open-ended questions of the survey makes it possible to compare the expectations of the Chinese tourists before coming with the actual experience of travelling Scandinavia.

**The ideal Scandinavian experience**

Chinese visitors’ expectations to Scandinavian cities outline an ideal travel experience, involving:

1. An experience of Scandinavian cities as green, clean and relaxed
2. An opportunity to escape a busy everyday life and indulge in the serenity and tranquility of Scandinavia to ease the mind
3. An educational journey to broaden the mind by exploring local history, tradition and society.

**The actual Scandinavian experience**

The actual travel experience of the Chinese visitors does, however, leave room for improvement for Scandinavian cities. While many visitors point to the beautiful Scandinavian landscape, clean air and green cities, the Chinese tourists also return home with an impression of Scandinavian cities as:

1. Inconvenient to travel due lack of Chinese information and service
2. Not as clean and green as expected
3. Providing an inadequate service level.
**Making Scandinavia accessible and convenient**

The Chinese visitors are looking for an authentic Scandinavian experience with green scenery, clean air and local history and culture in focus. With travel experience, this crave for authenticity and local flavor becomes more accentuated. But, the Chinese visitors experience essential hindrances in accessing the authentic experience. Lack of Chinese tourist information, services and products leave the Chinese visitors confined to the guidance of tour groups, despite lower satisfaction with their own influence on travel itinerary and the itinerary provided by the travel agency.

**Recommendation:**

- *Make the authentic Scandinavian experience accessible by providing Chinese tourist information and customized tourist products, ie. mobile apps guiding visitors through the cities’ attractions and offerings.*

Scandinavian cities need to understand the starting point of Chinese visitors and appreciate the expectations of Chinese visitors to the Scandinavian experience. By providing on site Chinese tourist information and customized tourist products that guide Chinese visitors through the cities’ different offers, Scandinavian destinations can facilitate the expected authentic, yet accessible Scandinavian travel experience.

**Preparing for the service encounter with Chinese visitors**

In addition to providing Chinese language tourist information and products to ensure the accessibility and convenience of Scandinavian cities to Chinese visitors, the survey results also point to the need for destinations to improve the Scandinavian service experience.
Scandinavian city destinations need to prepare for the encounter with Chinese tourists – in shops, hotels, museums and other institutions catering to the city’s international visitors. Through training of service personnel and development of customized service guidelines and products, the cities’ can facilitate a positive encounter with Scandinavia, increasing the likelihood of return visits.

**Recommendation:**

- **Prepare destinations for the Chinese visitors through development of customized service guidelines and products as well as training seminars for front-line service personnel.**
Introduction
- a survey of Chinese visitors to Scandinavia
Chinavia – a Scandinavian project
Chinavia is the title of a Scandinavian cooperation project targeting the Chinese outbound travel market. Initiated in 2012, the present project phase is a one-year pilot probing a larger, strategic roll-out. The objective of this pilot phase is to identify the main issue areas and opportunities in terms of reaching and servicing the Chinese consumers.

The Chinavia package
The Chinese travel market is a highly complex, fast-moving market. The research deliverables of the Chinavia pilot reflect this complexity in focusing on different aspects of the market, contributing to a more comprehensive understanding of the market anno 2012 and forward. In addition to present visitor survey, the list of deliverables also includes:

- **Market Review:** A desk research review of existing knowledge and research on the Chinese outbound travel market, outlining the main market perspectives for Scandinavian city tourism.

- **Best Practice Survey:** A survey of marketing activities of European cities towards the Chinese market, identifying best practice and benchmarking Scandinavian city efforts against those of other European cities.

- **European market study:** A statistical benchmark analysis of Chinese market growth potential to the European and specifically Scandinavian tourism industry (by Claus Sager, Tourismdesign).

- **Explorative web study:** A mapping of the Chinese internet landscape, providing a snapshot of Scandinavian online presence in China.
With a total of 678 field interviews with Chinese visitors to the 3 Scandinavian cities of Stockholm, Helsinki and Copenhagen, this survey zooms in on the Chinese tourist and provide insight into the travel motivations and experiences of Chinese tourists travelling to, around and through Scandinavia.

**Survey scope**
The survey was conducted in three Scandinavian capital cities; Helsinki, Stockholm and Copenhagen throughout the month of August 2012:

- Copenhagen: July 26-27, July 31-August 3
  Total: 271 interviews
- Helsinki: August 13 – 26
  Total: 200 interviews
- Stockholm: August 20-25
  Total: 207 interviews

The target number of interviews in each city was 200. As a 2-day trial was performed in Copenhagen, the number of interviews in this city is higher. All interviews, including the trial interviews, are included in the total sample.

**Survey questionnaire**
- The survey was conducted on the basis of printed questionnaires, which the respondents in most cases were able to fill out themselves once given a brief instruction.
- The same questionnaire was applied in all cities, adapted with city name, logo and brief introduction.
- The questionnaire consisted of 26 questions, 3 of which were completely open-ended.
- The content was translated from English to Mandarin, using simplified Chinese characters.
In addition to the translator, the questionnaire was proof-read by another native Chinese.

To test the questionnaire and survey set-up, a 2-day trial was performed in Copenhagen Airport.

Survey venues
The venues differed slightly between the cities, though with the Global Blue airport offices as common denominator.

In both Copenhagen and Stockholm one interviewer worked mornings by Global Blue landside office in the airports (Copenhagen Airport and Stockholm Arlanda Airport). In the evenings, a team of three interviewers contacted Chinese travellers waiting to board the direct flights to China. In Copenhagen, this involved the two SAS departures to Shanghai and Beijing, respectively, while in Stockholm the interviewers focused on Air China’s Beijing departure.

In Helsinki, two interviewers were given two weeks to collect the target 200 interviews. They divided their time between the Global Blue landside office and different locations throughout Helsinki city.

Surveying the Chinese
To ensure a positive encounter between interviewers and Chinese tourists, a few essential cultural traits were taken into consideration when designing the set-up:

China’s culture of 关系 and gift-giving
By offering respondents a small gift as a token of appreciation upon completing the questionnaire, the survey strived to reflect Chinese culture of gift-giving. Gift-giving is seen as a fundamental part of maintaining social networks and relationships in China, an element of the strong culture of guanxi.
In Copenhagen, respondents were presented with a piece of amber, sponsored by the Danish company House of Amber. In Helsinki respondents were gifted with a key chain of Helppi, the city mascot, and in Stockholm respondents received a smart phone sticker with the city logo.

**Chinese concept of 面子 - “face”**

Similarly reflected in the survey design was the Chinese concept of “giving face”. The Chinese are generally unwilling to “lose face” and will rather refuse to participate than risk to “lose face” by responding in English. In addition, it is a common assumption that Chinese are relatively sensitive to any perceived sense of hostility or bias against their culture. By presenting them with a Chinese questionnaire and Mandarin-speaking interviewers, the atmosphere was both relaxed and easy, yet also very respectful to Chinese culture.

**Confucianist ideal of 以和为贵**

The confucianist ideal of 以和为贵 (yiheweigui), which translated means putting peace above all or as the highest ideal, which in daily interaction involves a general reluctance and dislike to cause disagreement or conflict. In relation to the survey, it was important that the respondents would share both their best and worst experience while travelling in Scandinavia. As it may be considered contrary to the ideal of yiheweigui to share worst experience with actual representatives of the destination, interviewers were instructed to positively encourage sharing this worst experience and taking the time to explain that this was solely with the intention of understanding how to improve the destinations to Chinese tourists. With more than 400 responses specifically detailing worst experiences of Chinese tourists, this approach seemingly was successful.
Survey qualifications and limitations

The representative quality of the survey data was sought by:

• Combining venues for contacting respondents; both travellers of direct and connecting flights, while in Helsinki also tourists in the city.

• Approaching respondents in Mandarin.

• Providing the questionnaire in simplified Chinese characters. As such, the data could see a bias against travellers from the southernmost parts of China (Guangdong, Hong Kong and Taiwan), where traditional characters and Cantonese dialects are more prevalent. It is, however, commonly acknowledged that it is easier to go from traditional to simplified characters than the other way around.

• Conducting the survey in all three cities throughout the month of August. Though slight seasonal changes may be reflected in the data, the month of August is generally part of the Chinese school holiday season (July – August) and doesn’t coincide with any Chinese national holidays.

Furthermore, survey data show relatively distinct differences between the three cities of survey. The analysis will highlight these differences, yet caution readers to keep in mind that while differences stand out between the cities, the lion’s share of respondents (84%) indicate that their visit to the specific city is part of a tour of several countries, 79% specifies this as a tour involving other Scandinavian countries. This means that the general results for Scandinavia as an entity has relevance to understanding the Chinese traveller at large.
Survey structure
The survey explores five overall aspects of the Chinese visitors to Scandinavia:

1. Who’s the Chinese visitor to Scandinavia?
2. How does the Chinese visitor travel to Scandinavia?
3. Where does the Chinese visitor look for information both before and during the trip?
4. What motivates the Chinese visitor to travel to Scandinavia?
5. What is the overall impression of Scandinavia after the trip?

Each chapter will firstly outline the general picture of Chinese visitors to Scandinavia as an entity. Following the overall picture, differences between different segments will be outlined where relevant.
Profiling
- who is the Chinese visitor to Scandinavia?
Who’s travelling to Scandinavia?

The first step in profiling the Chinese tourist travelling to, around and through Scandinavia is to outline the key socio-demographic characteristics of the traveller:

There is an approximately equal share of female and male travellers with the vast majority belonging to a working age span of 25 – 54 years, featuring 23% between 34 – 44 years.

Though the majority of respondents indicate an educational level of college or above (79%), more than half are insecure English speakers, rating their English level as either broken or non-existent. In assessing the high level of insecurity in speaking English, it is important to keep in mind the Chinese culture of keeping face – and the unwillingness to lose face by speaking a less-than-perfect English.
Mainly working age travellers

The overall results show a majority of working age travellers. When looking at the age division between the cities, Helsinki sees a larger percentage of visitors within the working age span (69%) in contrast to Copenhagen with a share of 51% working age travellers.

When looking at the specific age span of 25-34 year olds within the working age group, the differences are even more apparent. Among Chinese respondents in Helsinki and Stockholm, this age group accounts for 24%, whereas the same group in Copenhagen only accounts for 13% of respondents.

As the following results will show, this difference is related to the different division of Chinese tourists travelling with or without a tour group.
**Tour groupers are older**

The age division also reflects the travel arrangements of Chinese travellers. The data shows a higher propensity of the elderly tourists travelling with a tour group, whereas younger travellers are more likely to travel independently. As a larger share of the respondents in Copenhagen travel as members of a tour group, this could explain the elderly segment of Chinese tourists in the Danish capital. The fact that senior travellers are more likely to travel in tour groups is also supported by results from other sources of research, including statistics of China Tourism Academy (as reported by SOAS, 2011).

**Gender ratio close to 1:1**

The Scandinavian average shows an almost equal share of male and female Chinese tourists. The slight deviations in the ratio of male:female travellers between the cities can most plausibly be explained by the nature of gifts for completing the questionnaire.

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Source: SOAS, 2011

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**Age distribution of tour groups vs independent travellers**

- **Late working age / retired**
  - Tour groupers: 28%
  - Independent travellers: 14%

- **Working age**
  - Tour groupers: 57%
  - Independent travellers: 64%

- **Before Working age**
  - Tour groupers: 15%
  - Independent travellers: 22%

**Q: Age**

**N: 665 respondents**
Average income of visitors to Scandinavia

45% of respondents are from either one of the two major cities in China, Beijing and Shanghai. This reflects findings of other market surveys and researches, ie. European Travel Commission identifying Beijing, Shanghai and the Guangdong province as the main tourism-generating areas of China.

The survey results show that 53% of the Chinese visitors surveyed have a monthly income below RMB 10.000, while only 12% indicate a monthly income of RMB 40.001 or above. This level reflects the average annual income levels of urban households in both Beijing and Shanghai according to China’s National Bureau of Statistics.

With a monthly income level of RMB 10.000, a trip to Scandinavia naturally involves a big budget expense. In the specific context of China, however, it is important to also consider the following elements in relation to the purchasing power of Chinese consumers:

1. The questionnaire asked respondents for their monthly salary or wage level (月工资). The Chinese visitors surveyed can therefore be assumed to have responded according to their monthly salary, rather than income at large. Respondents could therefore also have other sources of income not reflected in their response to the questionnaire. This was also reflected by the experience of interviewers, as several respondents that were retired or studying asked for guidance on how to respond.

2. In terms of purchasing power, Chinese residents should financially be lumped together in groups of threes and sixes as generations often live together or at least have a very integrated private economy. This makes the actual purchasing power of lower income household members stronger as other members provide.

3. Cultural differences could also imply an unwillingness to reveal personal financial information. China is furthermore considered to have a large grey economy, not accounted for in official statistics, but generally assumed large enough to change statistics substantially.

**Independent travellers earn more**

In relation to the mid-range income levels there is a clear difference between traveller segments with 43% of independent travellers indicating an income level of RMB 10,000 – 40,000 against 28% of tour group travellers.

**Independent travellers indicate higher income levels**

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Independent travellers</th>
<th>Tour groupers</th>
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<tbody>
<tr>
<td>Below RMB 10,000</td>
<td>45%</td>
<td>59%</td>
</tr>
<tr>
<td>RMB 10,000 – 40,000</td>
<td>43%</td>
<td>28%</td>
</tr>
<tr>
<td>RMB 40,001 – 70,000+</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Q: Average monthly income
N: 625 respondents

Highly educated Chinese travellers

In general, Chinese tourists are highly educated with university degrees of BA-level or above. When comparing the cities’ respondents, both Helsinki and Stockholm see over 10% more visitors with higher university degrees (masters level or above). When comparing tour groupers and individual travellers, the latter demonstrate a much larger proportion of higher university degrees (masters level or above).

Insecure English speakers

Despite the high education levels, the survey results show a relatively large proportion of Chinese tourists that are uncomfortable communicating in English.

In China, however, the level of English is generally assumed to be more a matter of whether ones family has connections with Chinese living abroad than the level of education. There is also the possibility that the Chinese culture of face – and fear of losing face by speaking a less-than-perfect English – could impact the respondents’ assessment of their own English level.

Source: ETC, Market Insights – China 2011
**Larger share of insecure English speakers to CPH**

When comparing the cities, Copenhagen sees a larger percentage of respondents assessing their level of English as either broken or non-existent (72%), whereas both Stockholm and Helsinki see 51% and 52% of respondents, who are insecure English speakers. As English is generally considered the global “travel language”, the insecure English speakers are more likely to prefer the comfort of travelling with a tour group. As Copenhagen see a much larger share of tour groupers, this also also explains the city’s high share of poor English speakers.

**The experienced traveller speaks English**

The importance of foreign language comfort is also reflected in the correlation between travel experience and English level. There are considerably more 1st time visitors who rate their English level as either broken or non-existant (69%) than the experienced travellers (24%).
**Chinese tourists come from the whole of China**

A large percentage of respondents come from the two large cities of Beijing and Shanghai. Due to the relative wealth of these cities and the Eastern provinces and the more convenient travel access of these areas, this was expected.

The questionnaire largely listed coastal cities and provinces as answer categories for respondents to choose from. 23% of respondents, however, indicated “Other” as their geographical point of departure and contributed to a much more wide-spread image of the Chinese tourists’ starting point.

**Most visitors from Beijing and Shanghai**

Helsinki sees comparatively more visitors from Beijing (35%) than the other two cities (Copenhagen 27%, Stockholm 23%), whereas travellers from Shanghai are more represented among the respondents in
Copenhagen (23% against 16% in Helsinki and 11% in Stockholm). The lower share of respondents from Shanghai in Stockholm could probably be due to the lack of direct flight connection.

Though Helsinki also has a direct flight connection to Chongqing, this is not immediately reflected in the distribution of travellers. The route opened in May 2012, so this could perhaps be explained by the relative novelty of the connection.

**Other big Chinese urban players fall behind**

The coastal provinces are the wealthiest of China and have been so for years. They therefore pose a somewhat expected travel segment.

Beijing and Shanghai are individually represented on the map indicating the division of survey travellers. However, the large, Northern city of Tianjin (city with province-level municipality status) and the rich Southern province of Guangdong (both with GDP/capita levels to match both Shanghai and Beijing) are very sparsely represented in the survey. Copenhagen see 0% from either one of these two areas, whereas Helsinki sees 4% and 8% from Tianjin and Guangdong respectively, while both areas are each represented by 3% among respondents in Stockholm.

**South of China travels to Stockholm**

Though the number of travellers are comparatively small, it is noteworthy how Stockholm sees a much larger proportion of Chinese tourists travelling from the inner west and southernmost parts of China, including the non-mainland regions of both Hong Kong and Taiwan. This could possibly be due to business connections between these regions and Sweden, or the larger share of tourists surveyed that are travelling to visit friends and family in Stockholm. With the motivation of visiting family, tourists are perhaps more inclined to travel from more remote Chinese regions to arrive at the destination.
Travelling
- how does the Chinese visitor travel Scandinavia
How the Chinese visitors travel Scandinavia?
With the objective of outlining the average Scandinavian trip of Chinese tourists, the survey asked respondents to further detail their travel arrangements and itineraries.

**Travelling with spouses or colleagues**
While 28% of Chinese tourists in the survey travel with their partner or spouse, an almost equal share are travelling with colleagues (27%).
However only 15% of respondents indicate the specific purpose of their travel as work-related, whereas 54% of all respondents are travelling for holiday.

**Mainly tour groupers**
The majority of Chinese visitors in the survey travel as part of a tour group (59%).

- 28% travel with partner/spouse
- 59% travel with a tour group
- 84% tour several countries
- 54% are holidaying
- 63% stay for 0-2 nights
- 79% are here for the 1st time
- 45% are in Europe for the 1st time
- 90% visit tourist attractions
- 64% have a shopping itinerary
Touring several countries

84% of the Chinese visitors surveyed are touring several countries on their trip. 71% are touring Scandinavian countries exclusively.

A short stop of 0 – 2 nights

Touring more than one country in one trip, the travel itinerary is very tight. This is also reflected in the duration of the Chinese tourists stay in each city, averaging between 0-2 nights (63%) with 30% staying for just 1 night in the city of survey.

1st timers to Scandinavian cities

The majority of Chinese tourists are visiting the specific city of survey for the first time (79%), while for 45% of the respondents it is also the first time visiting Europe. Visiting for the first time, there is naturally a need maximize value by visiting more countries, which explains the high share of respondents touring several countries in one trip.

1st timers to Europe

The high percentage of 1st timers to Europe is somewhat surprising. Chinese travellers prefer popular and more widely-known destinations like France, Italy and Germany. The lesser-known destinations, including the Scandinavian destinations, are often assumed to be for the 2nd or 3rd visit to Europe. However, for 45% of the Chinese tourists surveyed, Scandinavia is the first European encounter.

The Chinese go for “Kodak moments” and culture

While here, the Chinese tourists mainly visit famous tourists attractions (90%), yet the results also show a comparatively high degree of cultural activities in terms of visiting museums and exhibitions (57%). Finally, activities like eating Chinese food and shopping for souvenirs are also ranked as important (both by 51%), while the importance of shopping is reflected in the high number of respondents confirming that they have a shopping itinerary as part of their trip to Scandinavia (64%).

Travelling with spouses and colleagues

When comparing the results from the three Scandinavian cities, the main differences in terms of travellers’ companionship mainly relate to spouse/partner and colleagues.

While 33% of respondents in Stockholm are travelling with their spouse/partner (14% more than in Helsinki), 37% of respondents in Helsinki travel with their colleagues (16% more than in Stockholm). Finally, Copenhagen sees a slightly larger share of respondents travelling with children.

Travel companions depend on travel purpose

Companionship is highly reflective of the purpose of travel. The correlation shows a clear and unsurprising correlation between purpose and the choice of travel companionship.
For respondents travelling for purposes of business, there is a higher propensity of travelling together with colleagues (65% against 17% for those holidaying) as opposed to respondents travelling for holiday, who are more likely to travel with their spouse or partner (35% against 5% for those on business).

Chinese tourists are on holiday
Chinese tourists to Scandinavia are mainly here for holiday reasons (54%). The distribution of respondents between travel purpose corresponds to data on purpose of outbound travel of Chinese tourists as published by China Tourism Academy (CTA), referenced by STB market briefing 2012. These numbers show 66% of leisure travel and 14.4% business travel for Chinese outbound travel, demonstrating that Chinese travel to Scandinavia does in fact follow a similar purpose pattern.

Q: Who are you travelling with?
N: 752 respondents (some respondents chose more than one answer)
When comparing the cities, there are marked differences between purpose of travel among respondents in the cities.

These differences are reflected in the number of respondents travelling with a tour group. The majority of respondents in Copenhagen are travelling as part of a tour group and are therefore mainly travelling for holiday purposes, whereas Helsinki sees a larger share of business travel and Stockholm a larger share of Chinese travellers visiting friends/family.

Helsinki enjoys a number of convenient flight connections to several parts of China, which could in part explain the city’s large share of business travellers. For Stockholm and Sweden, the existence of large companies such as Volvo and Ericsson, both with strong ties to China, could result in a higher number of business travellers, but also potentially a larger number of Chinese expats living in Sweden, who receive visitors from back home.
Tour groupers are on holiday

Many of the differences between the three cities can be related to the fact that the vast majority of respondents in Copenhagen are travelling as part of a tour group (82%). Including the purpose of travel, where 68% of tour groupers indicate holiday as their main purpose of travelling to Scandinavia.

With smaller shares of tour groupers, respondents of Helsinki and Stockholm represent a more diverse set of travel purposes. In Stockholm 23% are travelling to visit friends and family, while in Helsinki 25% of respondents travel for business against 14% in Stockholm and only 9% in Copenhagen.

As already suggested, the large number of respondents in Stockholm visiting friends and family could imply a larger Chinese expat population. This could also plausibly explain the lower proportion of tour groupers in Stockholm, as knowing someone residing in the travel destination makes both visa process and travel planning in general a much easier and more manageable task.
63% of Chinese tourists stay for 0-2 nights

The general Scandinavian picture indicates shorter stays of between 1-2 nights in each of the cities. 63% of respondents stay for 2 nights or less. Only 9% have no overnight stay and a rather large share of respondents stay for more than 5 nights (20%)

When correlated according to respondents travelling with or without a tour group, the results show a different picture. The vast majority of tour groupers stay for 1-2 nights, while a large share of independent travellers (45%) stay for more than 5 nights.

The short stays are not specific for Scandinavian destinations, but however common for Chinese tours to all European destinations. According to ETC Market insights, destination statistics suggest that the average length of stay is 2.1 nights in Germany, 2.0 in France, 1.8 in Czech Republic, 1.6 in Italy, Belgium and the Netherlands and 1.5 in Switzerland.

Source: ETC, Market Insights – China 2011

Q: What is the duration of your stay in (city)?
N: 673 respondents
Longer stays for travellers visiting friends and family

The large share of independent travellers who stay for 5+ nights are primarily the group of Chinese tourists that are visiting friends or relatives (60% of those staying 5+ nights are travelling with the purpose of visiting family or friends), whereas business travellers are more evenly distributed with approximately the same share of business travellers staying for 1-2, 3-5 or 5+ nights (34%, 29% and 29% respectively).

In correlation with the high number of tour groupers on holiday, 75% of Chinese tourists travelling for purposes of holiday stay for 0-2 nights.
84% of Chinese tourists are "on tour" of several destinations

The comparatively short stays of Chinese tourists in each of the Scandinavian cities is in large part due to the fact that they are touring several countries in one trip. 84% of the Chinese tourists confirm being on tour of several European destinations. For Chinese tourist travelling with a tour group, the share is even larger with 95% of the Chinese tour groupers touring several countries in one trip. The majority of independent travellers similarly take the chance to see more than one country while here, totalling 68%.

Very few visit Copenhagen exclusively

For Scandinavia as an entity only 16% are not on a tour of several destinations. This low number is primarily due to the very small share of respondents in Copenhagen, who are exclusively visiting Copenhagen as a destination (7%). With the large number of tour groupers in Copenhagen, the majority will be on a larger tour of several destinations, whereas

Q: Is your stay in (city) part of a tour of several European destinations?
N: 675 respondents

![Graph showing data on tourist destinations]

- **Tour groupers**:
  - 95% are touring several countries

- **Independent travellers**:
  - 68% are touring several countries

- **Low share of tourists exclusively visiting city of survey**:
  - **CPH**: 7%
  - **HEL**: 21%
  - **STH**: 23%
respondents in both Stockholm and Helsinki are more likely to have an exclusive focus of travel, according to their purpose of either business or visiting family and friends.

**Touring Scandinavia exclusively or combined**

In the survey respondents were asked to indicate which other countries were included in their tour. In total 58% of the respondents on tour of several destinations specified these other destinations (totalling 326 answers). These answers were quantified according to three subcategories (of course all in combination with the city of survey).

These three subcategories are:

- Touring Scandinavia **exclusively** (incl. Iceland)
- Touring Scandinavian destinations **combined** with non-Scandinavian destinations
- Touring non-Scandinavian destinations **only** (apart from the Scandinavian city of survey)

For Scandinavia as an entity, a total of 71% are exclusively touring Scandinavia, while the remaining respondents are equally divided between the other two subcategories.

The high number of respondents touring Scandinavia exclusively is supported by recent research results from the international consultancy of Kairos Future, who have mapped the mental travel routes of Chinese travellers according to a netnographic study of Chinese netizens online activity related to travel. In this context, the five countries of Denmark, Sweden, Finland, Norway and Iceland are positioned in the same group and therefore considered more or less as parts of the same destination entity. 71% touring Scandinavia exclusive (and as many as 81% of respondents in Copenhagen touring only Scandinavian destinations) attests to this grouping of destinations.

Helsinki combined with non-Scandinavian destinations

Especially among respondents from Helsinki, there is a large share of tourists combining their visit to Helsinki with a tour of non-Scandinavian destinations.

Summing up the open answers, 33% of these involve a combination of Helsinki with a tour of the Baltic states. The additional 67% combine Helsinki with a relatively broad variety of non-Scandinavian destinations, ie. France, Italy and Switzerland.

Q: Please indicate which other cities you will or have already visited on this trip?
N: 326 respondents
Chinese tourists are first timers to Scandinavia

79% of survey respondents indicate that this is their first time to visit the respective Scandinavian city of survey.

Despite expectations that Chinese tourists first visit Scandinavia once other, more famous European destinations have been ticked off the wish list (ie. France, Italy), a surprisingly large group of respondents are also visiting Europe for the first time. For 54% of Chinese tourists surveyed, Scandinavia is hence the first European encounter.
**Independent travellers have more experience**

When looking at the difference in travel experience between tour groupers and independent travellers, the majority of both groups are visiting Scandinavia for the first time (though 32% more tour groupers than independent travellers). Surprisingly an almost equal number is also visiting Europe for the first time.

Looking at second timers, and even more so for third or fourth timers, the percentage of independent travellers increase as compared to the tour groupers.

The reason for this may well be either business related or family relations. Specific business activities could plausibly necessitate frequent returns to the same destination in much the same way as having friends or family connections in Scandinavia or other European countries would involve more frequent return visits.

![Graph showing travel experience between tour groupers and independent travellers.](image)
5+ timers are a rare species

There are very few travellers who have been to Scandinavia more than 5 times. The Scandinavian average of very experienced travellers (that have been to the Scandinavian city of survey more than 5 times) is 7%.

When looking at the cities individually, respondents in Stockholm represent the largest share of very experienced travellers. A total of 16% have been to Stockholm more than 5 times, whereas Copenhagen has only 1 respondent (0%) of very experienced travellers among the surveyed Chinese tourists.

As previously seen, Stockholm also has a relatively large share of respondents visiting friends and family. The results could therefore point to the return of travellers visiting the Chinese expat community in Sweden, or return for ongoing business activities.
**Chinese tourists shop according to plan**

The Chinese are known to be big shoppers when travelling. Among the Chinese tourists in the survey, 64% confirm having a shopping itinerary for their Scandinavian visit. As the questionnaire does not specify by whom the itinerary has been prepared, this could be a set itinerary as prepared by the travel agent or simply a shopping plan prepared by the visitor. The key is, however, that shopping has been given thought in the planning phases of travel.

**Non-tour groupers also have shopping plans**

Considering the large proportion of tour groupers among the Chinese travellers, it is perhaps not surprising that such a large share have a set itinerary for shopping. Interestingly, however, a large proportion of those travelling outside the pre-planned schedule of a tour group also confirm having a set shopping itinerary.
The Scandinavian shopping list

The Chinese survey respondents were asked to specify which shops were included in their shopping plans. 59% of respondents, who confirmed having a shopping itinerary, listed either specific shops or shopping items. The list of shops, brands and items is relatively long for each city with only a few responses repeated by more than 1 or 2 respondents. The below summarises the most frequent and/or most interesting answers given.

CPH: Shoes, watches and amber

For Copenhagen, the two answers scoring the highest frequency are:

- ECCO, the Danish shoe brand, with 27 respondents indicating this as part of the shopping itinerary; and
- Strøget, the pedestrian shopping street of Copenhagen, indicated by 26 respondents.

In addition, two shopping items stand out in frequency, namely watches (by 11 respondents) and amber (by 7 respondents).

STH: Shopping in NK

In the Stockholm listings one shopping location stands out:

- NK, Nordiska Kompagniet, the big department store in Stockholm City, indicated by 19 respondents as part of their itinerary

Surprisingly, only 6 respondents specifically highlight H&M, while no special shopping items are emphasized.

HEL: Luxury and local brands

At quick glance, the list for Helsinki differs from the other two cities by including more local brands. Apart from the one big shopping location of Stockmann, Helsinki’s big department store, the list includes several Finnish brands, ie. Iittala and Marimekko. The shopping list for Helsinki also includes a number of international luxury brands, ie. Louis Vuitton as listed by 15 respondents.

See specified shopping list for each city, Appendix 3.
The Chinese go for “Kodak moments” and culture

When in Scandinavia the vast majority of Chinese tourists (90%) visit the cities’ tourist attractions. With 79% of the respondents visiting the Scandinavian destinations for the first time, it is not surprising that the travel itinerary includes these must-see attractions.

A rather large share of respondents also include visits to museums and exhibitions in their travel itinerary (57%). The Chinese tourists thereby demonstrate a comparatively high degree of cultural consumption while travelling. Though the two top activities, tourist attractions and museums/exhibitions, are related and potentially overlapping, the clear specification of museums and exhibitions does in fact delineate one from the other.
The two activities sharing third place in terms of popular activities are eating Chinese food and shopping for souvenirs (51%). Both are commonly associated with the traditional Chinese tourist, travelling in tour groups, rushing from one attraction to another with very packed schedules and no time to explore and indulge in the local customs and specialities of the travel destination.

The least popular activities are engaging in physical or nature-related activities, attending a concert/theatrical performance or event and finally gambling. As especially visiting casinos and gambling are typically highlighted as popular among Chinese and many casinos around the world (Australia, US, Macao) are specifically targeting mainland Chinese tourists, the low share of respondents indicating gambling as part of their trip is a little surprising. This could be due to lack of opportunity or that travellers, who choose to visit Scandinavia as opposed to other destinations, are not very interested in gambling. It is also possible that, as gambling has long been illegal in China, respondents are less inclined to indicate such activities as part of their visit.

**Traveller segments: Tourist classic vs. explorer**

Many of the activities listed pertain to the actual purpose of travelling; business travellers will naturally include business meetings or conferences in their travel itinerary. Meanwhile, the activities listed also induce the observation of a more thematic distribution between activities typically related to the traditional Chinese tour group traveller and the predicted trends of a more exploratory and independent Chinese traveller. While the two most popular activities remain visiting tourist attractions and museums/exhibitions, the main activity differences between tour groupers and independent travellers will be highlighted in the following sections.

Source: ETC, Market Insights – China 2011; SOAS, 2011; TUI, 2012; HVS, 2011
Travel & food: Tour groupers go for the known

One general difference between the two traveller segments is in terms of food consumption; a larger share of tour groupers eat Chinese food throughout their stay (61%) with only 31% venturing to try local food and even fewer going for international cuisine.

As most meals are typically included in the tour group package deals, the responses are not necessarily indicative of the preferences of travellers, but of the agency’s set travel programme. The travel agency is however assumably trying to satisfy the customers’ wishes and palates.

Independent travellers are more adventurous with 54% eating local food and 36% eating Chinese food during their stay. According to international research, the new Chinese tourist is seeking more in-depth travel experiences and a closer encounter with local customs and traditions; exploring the local food culture could be part of this new travel experience.

Source: Essential China Travel Trends, 2012; TUI, 2012; SOAS, 2011
Travel & shopping: Souvenirs as the most important shopping item

Both traveller segments emphasize shopping for souvenirs as the major shopping activity of their trip. Though differences are less outspoken, the shopping of Chinese tourists follows roughly the same pattern as food consumption.

The independent travellers are more inclined to explore the local design landscape of the Scandinavian destination, whereas tour groupers are more focused on shopping for luxury brands. Due to favorable tax free rules (and high national luxury taxes in mainland China) the Chinese tourists are known to be big luxury shoppers when travelling. According to Global Blue Analytics, China is the most important globe shopper nation (globe shopper defined as a person who regards shopping as a fundamental part of their travel experience).

Q: What did you do during your stay in (city)?
(note: option to tick as many activities as apply)
Total answers given to shopping-related questions: 644

Source: Global Blue Analytics, 2012
Activities by city

As Copenhagen sees a larger share of tour groupers on holiday, this is reflected in the activities of the Chinese tourists in the Danish capital. The activities of Chinese tourists surveyed in Copenhagen are primarily classic tourist activities; visiting tourist attractions, museums and exhibitions, shopping for souvenirs and for luxury brands.

Meanwhile, respondents in Helsinki display more exploratory behavior. They still indicate tourist attractions, museums and Chinese food as among the main travel activities. However, a comparatively larger share of respondents in Helsinki have shopped for local brands and a slightly bigger share have also eaten local food.

In Stockholm, the localized activities are not ranked very high on the travel itineraries. Stockholm, however, sees a smaller share of respondents seeking out Chinese food (only 39% as compared to more than 50% in both Helsinki and Copenhagen) and a higher share of tourist eating international food.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Copenhagen</th>
<th>Helsinki</th>
<th>Stockholm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit tourist attractions</td>
<td>85%</td>
<td>60%</td>
<td>20%</td>
</tr>
<tr>
<td>Visit museums / exhibitions</td>
<td>49%</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>Eat Chinese food</td>
<td>39%</td>
<td>56%</td>
<td>20%</td>
</tr>
<tr>
<td>Eat local food</td>
<td>39%</td>
<td>43%</td>
<td>39%</td>
</tr>
<tr>
<td>Eat international food</td>
<td>20%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Shop for souvenirs</td>
<td>41%</td>
<td>52%</td>
<td>18%</td>
</tr>
<tr>
<td>Shop for luxury brands</td>
<td>18%</td>
<td>37%</td>
<td>22%</td>
</tr>
<tr>
<td>Shop for local design</td>
<td>13%</td>
<td>28%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Q: What did you do during your stay in (city)?
(note: option to tick as many activities as apply)
Total answers given to above-included questions: 2332
Planning
- how does the Chinese visitor research Scandinavia?
How the Chinese plan their trip to Scandinavia?

The Chinese tourists in Scandinavia are online, both when planning and when travelling. Respondents were asked to detail their use of information sources, particularly online, in order to better understand where and how the Chinese tourists research in the planning phases of travel, where and how they search for information during travel and finally where and how they share their experience after their travel.

Researching online

54% of all surveyed Chinese tourists confirm that they have researched online for activities related to the specific Scandinavian city’s attractions, restaurants, museums and other before travelling.

54% researched online for activities in the cities before coming
78% have a smart phone
82% of which used it while here
44% downloaded APPs
67% have a Chinese social media profile
67% plan to post travel pictures online
Buying travel-related items online
Despite the fact that China’s online travel penetration rates are still among the lowest in the Asia-Pacific region and online travel bookings only amounted to 11% of the total market in 2011, 19% of the surveyed Chinese tourists indicate that they have in fact bought travel-related items online (ie. package tours, flights or accommodation).

Active social media users
Of all the Chinese tourists in the survey, 67% have social media profiles on the Chinese internet. Furthermore, the tourists are mainly present on Chinese social media sites.

Posting travel pictures online
67% of respondents plan to post their travel pictures from Scandinavia online upon return to China, while 41% plan to post online recommendations.

Chinese tourists are APPsters
Reflective of the fast-growing Chinese market for smart phones and use of mobile internet, 78% of Chinese tourists in Scandinavia have a smart phone. Of these, the majority (84%) have used it while here, while 44% have downloaded APPs in relation to their Scandinavian trip. The downloaded APPs are mainly related to way-finding or translations.

Source: PhoCusWright, October 2012
Tour groupers also research online

In the planning phases of travel the majority of independent travellers research online for flights and accommodation, when planning to trip to Scandinavia.

Tour groupers could be expected to have limited need to do independent research, as the travel agency usually provides everything as part of the often all-inclusive package deal. Still, 52% of tour groupers, however, confirm having done research online in relation to activities in the city of destination (restaurants, drinks, exhibitions etc), another 27% confirm having researched information in relation to shopping.

With a large share of the Chinese tourists researching the cities of destination before travelling, there is a clear potential to facilitate the travel consumption of the Chinese tourists when travelling Scandinavia.
Battle of search giants: Baidu wins!

Respondents were asked to specify the best websites to do travel research. The open answers were compiled and the answers with the highest frequency of answers are depicted in the following.

When summarising the open answers, two sites stand out:

- Baidu, market-dominating search engine in China with a market share above 80%
- Google, search engine where only the Hong Kong-based site is accessible in China, demonstrating a market share of approximately 5%.

Search engines vary between Scandinavian cities

The results show that Baidu is preferred by a slightly bigger group of respondents than Google. Though based on a relatively small number of answers, it is apparent that the search engine preferences of respondents differ between the three cities.

Source: Essential China Travel Trends, 2012

Q: Which internet sites would you characterise as the best to do research when making travel plans?

Frequencies in graph based on the total number of answers
N: 200 open answers
Baidu for Copenhagen and Helsinki

Baidu is particularly prevalent among respondents in Copenhagen and Helsinki with 31% of the answers in both cities pointing to Baidu as the preferred choice against only 7% in Stockholm.

Google for Stockholm

In contrast respondents in Stockholm prefer Google to Baidu; 36% of the answers point to Google as the preferred search engine against only 8% of the answers in Copenhagen. One important reason could be geographics: Google is more easily accessible and widely used in Hong Kong and Taiwan from which Stockholm see a larger share of respondents than the other two Scandinavian destinations. Another possible explanation could be language, especially for the prevalence of Baidu among Chinese visitors surveyed in Copenhagen. In the survey, Copenhagen sees a larger share of insecure English speakers and as Baidu favours Chinese content and generally delivers more search results in Chinese, the more insecure English speakers can be assumed to prefer Baidu as search engine.

Buying online: Ctrip vs. Booking.com

19% of the surveyed Chinese tourists indicate that they have in fact bought travel-related items online (ie. package tours, flights or accommodation).

Respondents were furthermore asked to indicate the best site to buy travel products online. When compiling the open answers, the two top sites are:

- Ctrip, one of China’s largest online travel agencies, primarily focused on mainland China
- Booking.com, an international site among the world’s leading online hotel reservations agency. The site is available in 41 languages, including Chinese.

A pattern of preference similar to the one of search engines can be observed as Booking.com is primarily recommended by respondents in Stockholm, while Ctrip is more prevalent among the recommendations of respondents in Copenhagen, perhaps reflective of Ctrip’s stronger mainland focus.
Chinese tourists are online and mobile

Reflecting China’s booming mobile internet market, 78% of Chinese tourists surveyed have a smart phone and 82% of them used it, while travelling in Scandinavia. In addition, 37% of them specifically downloaded mobile APPs related to their stay.

APPs related to maps and translation

Respondents were asked to specify which mobile APPs they downloaded. When compiling the open answers, they can be categorized in two overall groups:

• Mobile applications related to wayfinding, ie. maps or GPS applications (51% of the open answers)
• Mobile applications related to translation (21% of the open answers)

Q: Did you download any mobile APPs related to your stay here? If yes, please specify
Frequencies in graph based on the total number of answers specifying which APPs were downloaded
N: 141 open answers
Mobile APPs vary between cities

Though similarly based on the smaller number of open answers (total 141 open answers), there are differences in the download of mobile APPs between the cities.

Download of mobile APPs for wayfinding is more prevalent among Chinese tourists surveyed in Helsinki and Stockholm, whereas the tourists in Copenhagen download more mobile APPs related to translation.

The latter is plausibly related to the fact that respondents in Copenhagen are the least comfortable speaking English and therefore need assistance to communicate better. Meanwhile assistance to find your way is probably more relevant to the larger share of independent travellers in both Stockholm and Helsinki.

Q: Did you download any mobile APPs related to your stay here? If yes, please specify
Frequencies in graph based on the total number of answers specifying which APPs
N: 141 open answers
**Chinese tourists are social netizens**

China boasts the world’s highest number of internet users; 538 mio. users and growing. China is furthermore the most engaged country online with 92% of Chinese netizens contributing to social media. This engagement is reflected in the survey results, where the majority of Chinese travellers (67% for all Chinese tourists surveyed) have one or more social media profiles.

While social media users of Scandinavia are registered on sites like Facebook or Twitter, the Chinese netizens navigate an entirely different online landscape. This is also reflected in the survey, where respondents were asked to specify on which sites they have user profiles.

**Majority of Chinese tourists in all 3 cities have one or more social media profiles**

- **CPH**: 72%
- **HEL**: 66%
- **STH**: 60%

**Q**: Do you have one or more profiles on Chinese social media sites? (graph shows affirmative answers)

**Source**: Essential China Travel Trends, 2012; The Mind of the Chinese Traveller (Kairos Future), 2012; McKinsey, 2012
**Chinese tourists on Weibo and Renren**

The Chinese tourists surveyed were asked to specify on which social media sites they were registered. When compiling the open answers, the four most frequent sites are all Chinese. These are:

- **Weibo**; including both Sina Weibo and Tencent Weibo, both vastly popular microblog sites. Sina Weibo has approx. 350+ mio. users.
- **Renren**; recognized as the Chinese equivalent to Facebook with approx. 147 mio. users
- **Kaixin**; also a Facebook equivalent with approx. 116 mio. users
- **QQ**; instant messaging service with 550+ mio. users

**Chart:**
Most tourists are on Weibo and Renren

- **Weibo:** 40%
- **Renren:** 31%
- **QQ:** 10%
- **Kaixin:** 8%

Q: On which sites do you have a profile? 
Frequencies in graph based on the total number of answers specifying social media sites 
N: 278 open answers

Source: Jens Thraenhart, Dragontrail 2012; Sam Flemming, CIC Data 2012; McKinsey, 2012
Sharing the Scandinavian experience online

Among the Chinese tourists with a social media presence, the majority have plans to post something from or about their trip online. Only 11% indicate no plans to do so.

67% of Chinese tourists with a social media profile plan to post pictures from their trip online, while a little less than half plan to post online recommendations of sites and places.

These results show potential as user-driven marketing of the Scandinavian destinations as online recommendations and reviews are generally considered trustworthy in China. According to the 2010 Global Web Index netizens even trust reviews and insights on social media three times more than recommendations from an acquaintance.

Source: Jens Thraenhart, Dragontrail 2012; McKinsey, 2012
Expectations & satisfaction
- How the Chinese visitors perceive and experience Scandinavia?
What motivates the Chinese to visit Scandinavia?
To better understand the motivations and expectations of Chinese tourists travelling to Scandinavia, respondents were asked of their image of the Scandinavian city of survey before visiting for the first time.

Green & clean Scandinavia
There are three overall keywords that summarise the perceptions and expectations of Chinese tourists to the Scandinavian destinations. These are: Green; as a place with lots of parks, trees and flowers. Clean; as a place free of rubbish and pollution. Relaxed; as a place where life is easy, you feel safe and without worry.
How do the Chinese experience Scandinavia?

In order to assess the match between expectations and actual experience, and to further detail our understanding of the Chinese tourist experience in Scandinavia, respondents were asked to specify their aspects of their trip that were most satisfying and similarly most dissatisfying.

**Famous must-sees are the best**

The Chinese tourists surveyed are most satisfied with their visit to famous must-sees, their experience of local culture and the time to relax and recharge.

**Availability of Chinese info is poor**

Chinese tourists are most dissatisfied with the availability of Chinese information, Chinese-language mobile applications for travelling the Scandinavian destinations and the city websites in Chinese (or lack of same).

A concerted Scandinavian image

The statistics show a clear, concerted Scandinavian image involving the three keywords: **green, clean and relaxed**.

These key associations also resonate the analysis of Kairos Future, showing that among the major themes on Europe on Chinese social media sites are the perception of European cities as peaceful, clean and with blue skies.

Similarly concerted is the low perception of Scandinavian cities as modern. Less than 30% in all three cities expect Scandinavian cities to be modern, defined in the questionnaire as cities of new technology and modern facilities.

Source: The Mind of the Chinese Traveller (Kairos Future), 2012
Small differences in expectations
Though the results demonstrate a concerted image, there are also differences in the expectations and perceptions of the three Scandinavian capital cities.

CPH is historical and romantic
The Chinese visitors surveyed in Copenhagen have a strong expectation of the city as historical, more than for the other two cities. In addition, Copenhagen is also perceived as the most romantic of the three capitals.

Helsinki most convenient
Chinese visitors surveyed in Helsinki expect the city to be convenient, considerably more than respondents in both Copenhagen and Stockholm. In the questionnaire a convenient city is defined as a city where you can see and do everything in no time.

Expectations: Same, same but slightly different

Source: SOAS, 2012
Scandinavia hits on the tourist experience, flips on convenience

The Chinese visitors were asked to rate what is most important to them when travelling in general (on a scale from 1-5, with 1: not important at all and 5: extremely important). They were then similarly asked to rate their level of satisfaction with the same items while in Scandinavia (with 1: Very dissatisfied and 5: Very satisfied).

Top hit: Historical & famous sites

As clearly depicted in the overall scatter plot (see next page), the most satisfying elements of the Chinese visitors’ Scandinavian experience involve visit to historical and famous sites, experience of local culture and time to relax. All of these items score high on both importance and satisfaction (upper right corner of the scatter plot). The items in this section can generally be themed as “experience-level” items – what you actually see and do, while travelling.

Lack of convenience on the flip side

On the flip side of the Chinese visitors’ experience in Scandinavia are the items rated high in importance, yet low in satisfaction. These areas indicate important “room for improvement” to Scandinavian destinations in catering to the needs and wishes of Chinese visitors (lower right corner).

The most dissatisfying, yet important elements of the experience in Scandinavia include: the availability of city websites, mobile APPs and tourist information/maps in Chinese. These flip side elements can be themed as “convenience-level” items - or rather what makes it possible and easy to experience the travel destination.
Explorer activities are important

As previously described, travel research point to the development of a “new Chinese traveller segment” that is less price-sensitive and instead more focused on the quality of the experience and more willing to venture outside the safety of tour groups.

It is noteworthy that the majority of items in the upper right side of the plot (the hits section) are activities commonly related to this new and exploring traveller segment. These activities involves: experiencing the local culture, shopping for local design and eating local specialties, while also prioritising independent influence on travel itinerary.

Based on survey responses to 1) the importance of listed elements when travelling (on a scale from 1-5) the satisfaction with listed elements on this particular trip (on a scale from 1-5)
Copenhagen demonstrates an above-average satisfaction level in terms of visiting historical and famous sites. In this aspect, Copenhagen lives up to the expectations of tourists, depicting Copenhagen as the most historical city of the three.

Surprisingly, shopping is not rated as very important, yet satisfaction with this aspect is somewhat high.

The scatter plot furthermore underlines Copenhagen’s room for improvement. The Chinese tourists want more available Chinese information, including more Chinese speaking service personnel.

Finally, the low rating in both importance and satisfaction with the international restaurants of Copenhagen doesn’t match the city’s self-perception as being a gourmet capital.

**Based on survey responses to 1) the importance of listed elements when travelling (on a scale from 1-5) the satisfaction with listed elements on this particular trip (on a scale from 1-5)**
HEL for exploring local culture

Matching the expectations of tourists surveyed in Helsinki, historical & famous sites are not ranked nearly as high in terms of importance and satisfaction in Helsinki as is the case with Copenhagen.

Helsinki, however, hits in terms of experiencing the local culture and time to relax. This correlates well with the higher propensity of “explorer” activities in the travel itineraries of respondents in Helsinki.

With regards to room for improvement, Helsinki faces the same challenges as Copenhagen, including the accessibility and availability of Chinese language information. This is somewhat surprising as Helsinki is the only of the three cities with a Chinese language version of the city tourism website.

Based on survey responses to 1) the importance of listed elements when travelling (on a scale from 1-5) the satisfaction with listed elements on this particular trip (on a scale from 1-5)
**STH less convenient, but it’s not as important**

Though highlights remain largely the same across the Scandinavian picture, the room for improvement-section differs slightly.

Respondents in Stockholm are generally less satisfied with the availability of Chinese information, but they do not rate this nearly as important as respondents in the two other cities. The lower importance of Chinese language information could be due to the relatively high share of Chinese tourists visiting friends or relatives, in addition to the higher degree of experienced travellers to Stockholm. Both groups of travellers (which in many cases overlap) do not have the same need for assistance in touring the city, yet they still find the current standard of information available dissatisfying.

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Based on survey responses to 1) the importance of listed elements when travelling (on a scale from 1-5) the satisfaction with listed elements on this particular trip (on a scale from 1-5)
Comparing hits and misses between the cities: Desire to influence own travel itinerary

As outlined, there is a general picture across the Scandinavian city destinations of both hits and misses.

Keeping in mind, however, the considerably larger share of tour groupers among Copenhagen respondents, it is interesting to compare the scatter plot of Copenhagen to that of the other two cities.

In line with the development from the traditional Chinese tourist of tour groupers to the new and exploratory Chinese tourist, the respondents of Copenhagen indicate a lower degree of satisfaction with their own influence on travel itinerary, though rated as relatively important. The same for the travel agency’s itinerary, also rated relatively important, though in the lower ratings of satisfaction level.

In contrast the respondents of Stockholm are quite satisfied with their own influence on itinerary, which is also considered important. While the travel agency’s itinerary is neither important nor satisfactory. Though slightly less outspoken, the same can be observed from the responses in Helsinki.

Though difficult to conclude anything in relation to development trends without comparable data from previous years, the comparison of the cities (taking Copenhagen as representative of the traditional tourists and Stockholm as providing small insight into the more independent Chinese traveller) the results suggest that independent influence on travel itinerary is increasingly valued by Chinese tourists and the travel itinerary provided by tour agencies is increasingly dissatisfying to the travellers.
Motivation and experience – exploring the minds of the Chinese visitors
Scandinavia in the minds of Chinese visitors

The Chinese visitors in the survey were asked to openly share their motivation for travelling to Scandinavia, as well as their best experience and their worst experience in the Scandinavian city of survey.

These answers provide insight into two important aspects of understanding the Chinese visitors to Scandinavia, namely:

1) The ideal Scandinavian experience, which motivated the Chinese visitors to come
2) The actual Scandinavian experience, for better and worse

There are common traits across the Scandinavian borders, both in terms of motivation for coming and in relation to best and worst experience while here. These will be outlined in the following, while city specific differences will be detailed in the separate city chapters.

Word clouds and Chinese phrases

In assessing the open answers of the surveyed Chinese visitors, we’ve created word clouds for each category: motivation for coming, best experience and worst experience.

The word clouds graphically depicts the words that appear with the highest frequency in the answers. As such, the word clouds provide a quick overview of the main themes of the responses.

These word clouds are however only made with the English translations of answers, and only reflect the frequency of words in the responses given. To assess the more qualitative nature of the open answers, we’ve also looked at the original Chinese language responses and included key quotes to summarize the most important themes as well as differences between the cities.
Experiencing the “authentic” Scandinavia

The word cloud to the opposite compiles the answers for all three cities on what motivated the Chinese visitors to travel to Scandinavia.

Screening the cloud, the words that stand out are primarily related to an experience of what could be described as the “authentic” Scandinavia, involving key words like: customs, culture, scenery, local.

The verbs that appear most frequently include: experience, visit, relax, travel and learn.

Source for Word Cloud: www.wordle.net
Motivated to experience the foursome of Scandinavia

One of the primary motivations for travelling to the specific city of survey, as expressed by the Chinese visitors, is to experience Scandinavia as an entity of four countries. This is coined by the expression in Chinese: ”北欧四国”, which literally means the four countries of Northern Europe, namely Denmark, Sweden, Norway and Finland.

Through their motivation for coming, many respondents indicate a concerted expectation to the Scandinavian experience, involving the Scandinavian scenery, culture and history as well as a collective image of the Scandinavian people.

This resonates with the netnographic study by Kairos Future, mapping the mental travel routes of Chinese travellers, putting all four Scandinavian countries in the same group.

Source: The Mind of the Chinese Traveller (Kairos Future), 2012
Motivated by the opportunity to broaden the mind

Many Chinese visitors also express a motivation for coming to Scandinavia to make comparisons and learn from the experience of something new and different.

The travel-experienced express a motivation in comparing Scandinavia to other European destinations, whereas others are motivated by the opportunity to seek knowledge and general formation through contrasting the familiar and the unfamiliar, comparing China and Scandinavia.

Inherent to this motivation of broadening the mind by experiencing Scandinavia is also an overall motivation for travelling in general, namely to strive for life experience and general formation through travel to foreign destinations.

Q: What motivated you to come to Scandinavia and (city of survey)?
Opposite are quotes of Chinese visitors’ responses
Motivated by the opportunity to ease the mind

In addition to the educational aspects of travelling, the Chinese visitors also express an almost poetic expectation to the serenity and purity of Scandinavia. Their motivation for visiting Scandinavia is driven by the possibility to seek out the peacefulness of Scandinavia and relaxing the mind.

Reading the open answers of Chinese visitors, it becomes evident that this motivation of purity and cleanliness is not solely related to the Scandinavian environment and air quality, but also to the idea of a care-free society and its friendly inhabitants.

Meanwhile, the elements of cleanliness and purity are interrelated as for example clean air, lack of noise and easy living are all described as prerequisites to enjoy life and relax the mind.

Q: What motivated you to come to Scandinavia and (city of survey)?

Above are quotes of Chinese visitors’ responses
Best of Scandinavia: clean and beautiful

The white word cloud opposite compiles the answers for all three cities regarding the best experience of the Chinese visitors.

The word that appear with the biggest frequency are related to an experience of Scandinavia as clean, beautiful, friendly and comfortable, highlighting both the environment, the cities and the Scandinavian scenery.

Worst of Scandinavia: Lack of Chinese information, service and food

The black word cloud compiles the answers for all three cities regarding the worst experience of the Chinese visitors.

The word with the absolute highest frequency is “Chinese”. Looking through the answers this relates to the lack of Chinese information, signs, lack of Chinese-speaking staff and service and poor Chinese food.
Best of Scandinavia: A harmonious experience

Reading through the answers, the words related to “best experience” that stand out with the highest frequency in the word cloud, are related to an overall experience of Scandinavia as an orderly and harmonious society.

The experience of a harmonious society primarily concentrates on key elements like fresh air green environment and little pollution, but also involves the balance between man and nature, the orderly society and the civilized and friendly behavior of Scandinavian society.

The underlying experience of harmony is important, as harmony exists as a deeply rooted element of Chinese culture, both as an element of yin and yang, but also as an objective of modern day Chinese politics.

Q: What was your best experience while in (city of survey)?
Above are quotes of Chinese visitors’ responses
The worst of Scandinavia: Inconvenient for Chinese visitors

Though the worst experiences of Chinese visitors vary between the three cities of survey, there is an overall complaining – also apparent from the word cloud – of the inconvenience for Chinese visitors travelling in Scandinavia.

This inconvenience is mainly related to the lack of Chinese language information and service. Listed both in relation to the information provided by tourist informations and at attraction sites, as well as in relation to service experiences in airports, hotels, shops and restaurants.

In addition, the Chinese visitors express a general dissatisfaction with the quality and standard of Chinese food.

Q: What was your worst experience while in (city of survey)?
Above are quotes of Chinese visitors’ responses
Experience local culture and customs in CPH

The word cloud above compiles the answers of Chinese visitors to Copenhagen regarding their motivation for travelling to Copenhagen.

Scandinavia appears with a high frequency, reflecting that many Chinese visitors come to Copenhagen motivated to see all four countries of Scandinavia. The word cloud, however, also highlights the experience of culture and customs, traditions and history.

Motivated by fairytales and romance

In addition to the overall motivations for visiting Scandinavia, Chinese visitors to Copenhagen are also motivated by their familiarity with the fairytales of Hans Christian Andersen (Andersen (安徒生)), involving also a motivation to see the statue of The Little Mermaid. This fairytale image is also linked to a perception of Copenhagen as both historical and romantic, which also motivate Chinese to visit.

Q: What motivated you to come to Scandinavia and Copenhagen?
Above are quotes of Chinese visitors’ responses
Best of CPH: Clean and beautiful

The white word cloud shows the key words of best experiences of Chinese visitors to Copenhagen. The words of high frequency match the words that characterize the best Scandinavian experience. Interestingly, The Little Mermaid and H.C Andersen do not stand out as much as the more general experience of the city, involving key words like: clean, convenient, comfortable, beautiful and friendly.

Worst of CPH: Lack of Chinese info and messy streets

Similar to the overall Scandinavian picture, the black word cloud of worst experiences in Copenhagen also relate to the lack of Chinese information and Chinese-speaking service personnel. Contrary to the experiences of a city that is both clean and beautiful, several Chinese visitors also experience a city with dirty and messy streets.
Best of CPH: Friendly and good for shopping

Apart from the best Scandinavian experiences, as already outlined in the general picture, several visitors point to the their meeting with the friendly people of Copenhagen and Denmark as part of their best experience.

Copenhagen is furthermore emphasized as good for shopping, both in terms of price and convenience.

Worst of CPH: Dirty and messy

Describing their worst experience in Copenhagen, some Chinese visitors leave with an impression of Copenhagen as dirty and messy with rubbish in the streets and at tourist sites. This stands in contrast to the overall positive expectation and experience of Scandinavia as a harmonious and clean destination, as the dirt and mess is generally associated with a lack of order and a call by Chinese visitors for more "strict measures" to ensure a clean and tidy city.

Q: What was your best experience while in (city of survey)?
Opposite are quotes of Chinese visitors’ responses
Worst of CPH: Inconvenient to Chinese visitors

Copenhagen is no exception to the experience of many Chinese visitors that Scandinavia is inconvenient to the Chinese-speaking traveller. Visitors in Copenhagen point to the lack of Chinese information around the city and at tourist sites, and the lack of Chinese TV channels in hotels rooms as well as the general standard of Chinese food. The inconvenience of Copenhagen, however, also entails the lack of free WiFi around the city, lack of public rest rooms and an inconvenient currency exchange requirement.

Worst of CPH: Poor service experience

In addition to the lack of Chinese services offered, several Chinese visitors also point to poor service experiences, specifically in hotels and customs. A few visitors even resonate a feeling of general disrespect towards Chinese by the Danish people.

Q: What was your worst experience while in Copenhagen? Opposite are quotes of Chinese visitors’ responses
HEL for the Scandinavian experience, to visit relatives or do business

The above word cloud compiles the answers from Chinese visitors in Helsinki regarding their motivation for visiting the city. Scandinavia stands out, reflecting again that many visitors are motivated to visit all of Scandinavia rather than one individual Scandinavian destinations. However, with appearing with similar frequency are also the words: Business, relatives and friends and the verbs: visit, experience, attend and work. The word cloud thereby reflects the many Chinese visitors travelling to Helsinki motivated by specific purposes not necessarily related to holiday, but rather business and visiting friends or relatives.

Motivated by specific events and interests

In addition to the overall motivations for visiting Scandinavia, several Chinese visitors to Helsinki list specific events as their motivation for visiting, including international conferences, as well as rather specific interests in design and architecture.

“Living Lab Summer School”

“开国际会议，回国”
Attend international conference, return to China

“参加 IFLA 大会”
Attend the IFLA conference

“开会，会议工作”
Attend meetings, business conference

“赫尔辛基曾被评为最依据的城市，所以特来参观见识一下”
Helsinki was once ranked as one of the best places to live in the world, so decided to pay a visit to experience that.

Mainly a business visit, also to see the works of leading architects

Q: What motivated you to come to Scandinavia and Helsinki?
Above are quotes of Chinese visitors’ responses
Best of HEL: Clean, beautiful and the Finnish people

The white word cloud shows the key words of best experiences of Chinese visitors to Helsinki. The words of high frequency match the words that characterize the best Scandinavian experience, related to clean, beautiful, fresh air, green, environment. Similarly, the Finnish people are highlighted with high frequency as part of the best experience in Helsinki.

Worst of HEL: No Chinese info and inconvenient shopping

The black word cloud of worst experiences in Helsinki shows that the Finnish capital is also experienced as lacking Chinese information and service. With higher frequency than for Copenhagen, however, is the inconvenience of early closing hours for shopping, as well as the expensive prices of the city.
Best of HEL: Civilized, pure and tranquil

Though the experience of Scandinavia as a destination of cleanliness, order and purity is described by the Chinese visitors in all three cities, this narrative is even more outspoken among the visitors in Helsinki.

The orderly and pure experience of Chinese visitors in Helsinki is strongly related to the encounter with the Finnish people. Several Chinese visitors describe the Finnish as personifications of the orderly and pure society, emphasizing the honesty, civility and simplicity of the people.

Though all three Scandinavian cities are highlighted as places for relaxation, Helsinki stands out as the city with positive experiences related to the tranquility and slow pace of the city.

Q: What was your best experience while in Helsinki?

Above are quotes of Chinese visitors’ responses:
Worst of HEL: Too slow-paced

Though the tranquility and slow pace of Helsinki is emphasized by some Chinese visitors as part of the best experience in the city, other visitors equal the slow pace to an uninteresting experience.

Several respondents use the word boring to describe their worst experience and some even equal the slow pace of the city with an inefficient society where work is slow and shops close to early, making it inconvenient for Chinese visitors to experience.
Experience Scandinavia in STH or travelling for business, study or visits

The above word cloud compiles the answers from Chinese visitors in Stockholm regarding their motivation for visiting the city. Once again, Scandinavia stands out among the words, reflecting the motivation of Chinese visitors to visit all of Scandinavia. In addition to the words that reflect the Scandinavian tourist experience, including culture, scenery, environment, the Chinese visitors to Stockholm are also motivated by specific purposes like: study, business and visiting relatives.

Motivated by purpose or by STH as representative of Scandinavia

The motivations for visiting Stockholms are largely reflected in the word cloud. Going through the responses, the overall motivation is primarily in 1) visiting Stockholm as a representative of Scandinavia and therefore motivated by the opportunity to experience Scandinavia or 2) visiting Stockholm for business purposes, for studies or to visit relatives and friends.

Q: What motivated you to come to Scandinavia and Stockholm?
Opposite are quotes of Chinese visitors’ responses
Best of STH: Clean and friendly
The white word cloud shows the key words of best experiences of Chinese visitors to Stockholm. The words of high frequency match the words that characterize the overall best Scandinavian experience, related to the green and clean environment and beautiful scenery. The Swedish people are also highlighted as friendly and civilized. Also the word city appears with high frequency, as does convenient and transportation, reflecting the actual city experience as part of the best experience of Chinese visitors.

Worst of STH: Expensive and no Chinese info
The black word cloud of worst experiences in Stockholm shows that the Swedish capital is also lacking Chinese info and Chinese-speaking personnel, according to the Chinese visitors. In addition, the high price level of the city stands out with high frequency in the worst experiences of the Chinese visitors to Stockholm.
Best of STH: Friendly, historical and convenient

Chinese visitors to Stockholm describe their best experiences in the city as related to 1) the friendly people of Stockholm and Sweden, 2) the historical and beautiful sites to see and 3) the convenience of travelling there.

As the survey results show that Stockholm see a larger share of experienced and independent travellers, this could also be the explanation why the convenience of ie. transportation is highlighted by several respondents. Travelling outside of a tour group, visitors are more likely to make use of public transportation means and other offerings of the city.

Q: What was your best experience while in Stockholm?

Above are quotes of Chinese visitors’ responses
Worst of STH: Too expensive and poor service

In addition to the lack of Chinese information and service, as also highlighted for the other cities, there are two overall themes that stand out among the worst experiences of Chinese visitors to Stockholm, namely the price level of Stockholm and a number of poor service experiences.

Whereas Helsinki is noted for an expensive entrance fee at the national museum and Copenhagen praised for cheap shopping, Stockholm is noted as expensive on several aspects: food, hotel, transportation and "things".

Though poor service experiences are general to all three Scandinavian cities, several Chinese visitors to Stockholm highlight very specific incidents of poor service; at the tax refund desk in the airport, with travel agency services, taxi drivers and three visitors also describe unfortunate experiences of thievery and trickstery involving pick-pockets and accommodation scams.
Appendices 1-3
Sources of reference

- Flemming, Sam (CIC Data) – results as presented at China Day conference, November 2012 Copenhagen
- Global Blue Analytics, 2012 – as presented by Jan Møller, Vice President Sales, at China Day conference, November 2012 Copenhagen
- Juman, David & Douglas Quinby, PhoCusWright, *China Online Travel Traffic Overview*, October 2012
- Scandinavian Tourist Board, *Briefing on China Market*, February 2012
- Thraenhart, Jens (DragonTrail) – results as presented at China Day conference, November 2012 Copenhagen
- Z_punkt The Foresight Company in cooperation with the TUI Think Tank at TUI AG, *New Chinese Tourists in Europe from 2017, 2012*
24. 您在赫尔辛基旅游满意吗？请根据您的体验，在下面的问题上根据满意程度打分。
从 1 到 5，1 是最不满意，5 是最满意

<table>
<thead>
<tr>
<th>项目</th>
<th>满意程度</th>
<th>最不满意</th>
<th>最满意</th>
<th>无评价</th>
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<td>航班延迟和中转</td>
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<td>餐饮</td>
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<td>机场</td>
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25. 您这次旅行对赫尔辛基最好的印象是什么？

26. 您这次旅行对赫尔辛基最差的印象是什么？

27. 如果我们还有一些问题要问您，可否请您留下您的 e-mail？

谢谢您的合作！
13. 您是第几次来杭州？
- 第一次
- 第二次
- 第三次
- 第四次
- 五次以上

14. 您在赫尔辛基做了些什么？（可以在一个以上的空格内打勾）
- 参观旅游景点
- 参观博物馆/展览馆
- 品尝当地风味食品
- 品尝当地风味食品
- 品尝当地风味食品
- 吃中国菜
- 购买旅游纪念品
- 购买当地蜂蜜食品
- 购买当地商品
- 观看剧团演出、听音乐会及其他
- 参加商务活动、讲座及会议
- 参加体育活动（徒步旅行、骑自行车、滑板...）
- 赌场

15. 您第一次来赫尔辛基之前对赫尔辛基有什么印象？
（可以在一个以上的空格内打勾）
- 简单方便（不用很多时间就可以看到和吃到很多）
- 优美气息（风景优美、浪漫）
- 历史悠久（有悠久历史的建筑、雕塑、纪念碑）
- 绿色城市（有很多公园、森林和绿地）
- 环境整洁（很少垃圾和污染）
- 休闲舒适（生活轻松舒适，感觉很安全）
- 现代先进（高科技的科技技术和现代化的设施）

16. 您的旅行中有没有购物的计划？
- 有
- 没有

16.1 如果有，您请补充去了哪些商店购物？

21. 您是否在中国的社交网络上注册（比如weibo.com, renren.com, kaksin.com等）？
- 是
- 否

21.1 请问您在哪里注册了：

21.2 您是否已经或准备把您的旅行体验放在网上？（可以在一个以上的空格内打勾）
- 介绍、推荐
- 论坛
- 贴吧
- 录像
- 其他

您在旅游中重视的项目

22. 您在旅游中的时候，您一般认为哪个问题最重要？请根据您的看法，在下面的问题中 根据重要程度打分，从1到5，1是最重要，5是不重要。

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<td>旅馆的价格水平</td>
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<td>翻译员/导游和旅游信息、路线和城市地图</td>
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<td>中文版的旅游网页</td>
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<td>中文版的手机旅游导航</td>
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<td>您自己可以安排旅行行程</td>
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<td>体验当地的文化</td>
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<td>尽可能多参观景点</td>
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23. 您为什么选择去欧洲和赫尔辛基旅游？请简单地写一下您的主要目的。


APPENDIX 2: SURVEY QUESTIONNAIRE - STOCKHOLM

您对斯德哥尔摩的印象

24. 您在斯德哥尔摩旅游满意吗？根据您的体验，请在下面的问题上根据满意程度打分。

最不满意 1 2 3 4 5 满意 无意见

住宿

旅行团中心的位置

酒店的价格水平

旅行团的中文服务

餐饮

中餐厅

国际著名的餐馆

当地特色的餐馆

娱乐

可以购买到纪念品

可以在景点购买纪念品

可以品尝到本地特色的美食

景点

参观历史景点和必去的著名景点

参观现代和时尚流行的景点

信息

通过中文的旅游信息、路牌、和城市地图

中文版的旅游手册

中文版的旅游地图

旅游计划

您自己安排的旅游行程

旅行社安排的旅游行程

网上下载旅游目的地介绍和推荐

您认为的最印象

体验当地的文化

尝试当地食物和休息

尽可能参观景点

25. 您这次旅行对斯德哥尔摩最好的印象是什么？

26. 您这次旅行对斯德哥尔摩最差的印象是什么？

27. 如果我们还有一些问题问您，可否请您留下您的 e-mail：

谢谢您的合作！

游客调查表

您的斯德哥尔摩和北欧之行如何？

我们是斯德哥尔摩地区的官方旅游局。

为了帮助我们把北欧的旅游事业做得更好，请您回答以下的问题。

填写这个表格大约需要15分钟。

谢谢您的合作，祝您旅途一路顺风！

基本资料

1. 性别

   - 男
   - 女

2. 年龄

   - 18岁以下
   - 19-24岁
   - 25-34岁
   - 35-44岁
   - 45-54岁
   - 55-64岁
   - 65岁以上

3. 英语能力

   - 熟练
   - 能交流
   - 简单对话
   - 不会

4. 学历

   - 初中以下
   - 初中
   - 高中/中专
   - 大专
   - 大学
   - 大学以上

5. 月工资水平

   - 10000元（人民币）以下
   - 10001-20000元
   - 20001-30000元
   - 30001-40000元
   - 40001-50000元
   - 50001-70000元
   - 70000元以上

您这次在瑞典的行程

7. 您和谁同行？

   - 在所有的旅行者上打勾
   - 可以在一个以上的空格内打勾

8. 您是跟团旅行？

   - 是
   - 否

9. 您为什么到斯德哥尔摩旅游？

   - 休闲
   - 探亲访友
   - 工作
   - 学习
   - 其他

10. 您在斯德哥尔摩停留多久？

   - 不超过1晚
   - 1晚
   - 2晚
   - 3晚
   - 4-5晚
   - 5晚以上

11. 您在斯德哥尔摩停留是否是旅游之行中的一个部分？

   - 是
   - 否

11.1 如果是，请注明您的城市：

12. 您是第几次来斯德哥尔摩？

   - 第一次
   - 第二次
   - 第三次
   - 第四次
   - 五次以上
APPENDIX 2: SURVEY QUESTIONNAIRE - STOCKHOLM

13. 您是第几次来瑞典?
   - 第一次
   - 第二次
   - 第三次
   - 四次以上

14. 您在瑞典做了哪些事情?
   - 参观旅游景点
   - 参观博物馆/展览馆
   - 品尝当地风味食品
   - 品尝国际风味食品
   - 吃中国饭
   - 购买旅游纪念品
   - 购买高档品牌消费品
   - 购买当地特色消费品
   - 酒店服务细心周到
   - 参加商务活动、会议、演讲
   - 参加体育活动（徒步旅行、骑自行车、帆船...）
   - 购物

15. 您第一次来斯德哥尔摩之前对斯德哥尔摩有什么印象？
   - （可以在一个以上的空格内勾选）
     - 简单方便（不需要太多时间就能看到和体验很多事）
     - 清新气派（感觉更像是生活的感觉）
     - 历史悠久（有较多古老的历史，城堡、纪念碑）
     - 绿色城市（有较多公园，森林和绿地）
     - 干净整洁（很少垃圾和污染）
     - 休闲舒适（生活轻松安逸，感觉安全舒适）
     - 现代先进（有高水平的科学技术和现代化的设施）

16. 您的旅行中有没有购物的计划？
   - 是
   - 否
   - 其他

16.1 如果有，请注明去了哪些商店购物？

如何获取旅游信息

17. 您到过这里之前是否在网上查过斯德哥尔摩的旅游信息？
   - （可以在一个以上的空格内勾选）
     - 住宿
     - 飞机航班
     - 购物情况
     - 其他情况（参观景点、住宿、展览馆/博物馆）

18. 您在做旅游计划的时候，认为哪些网站提供旅游信息是最重要的？
   - www.
   - www.
   - www.
   - 我没有使用网络来查找信息

19. 您在购买机票、预定旅馆及其他旅游计划的时候，认为哪些网站是最重要的？
   - www.
   - www.
   - www.
   - 我没有使用网络

20. 您是否有智能手机/平板电脑？
   - 是
   - 否

20.1 如果有，您在这儿是否使用它？
   - 是
   - 否

20.2 如果是，您是否使用它做以下事情，比如电子地图、导航、语言翻译及其他？
   - 是，注明____________________
   - 否

21. 您是否在中国的社交网站上注册（比如weibo.com、renren.com、kaixin.com等）？
   - 是
   - 否
   21.1 请说明您在哪些网站注册了？

22. 您在旅游中重视的项目

<table>
<thead>
<tr>
<th>项目</th>
<th>重要程度</th>
</tr>
</thead>
<tbody>
<tr>
<td>亲朋好友见面</td>
<td>1</td>
</tr>
<tr>
<td>亲朋好友见面</td>
<td>2</td>
</tr>
<tr>
<td>亲朋好友见面</td>
<td>3</td>
</tr>
<tr>
<td>亲朋好友见面</td>
<td>4</td>
</tr>
<tr>
<td>亲朋好友见面</td>
<td>5</td>
</tr>
</tbody>
</table>

23. 您为什么选择到北欧和斯德哥尔摩旅游？请简单地写一下您选择的主要目的。
### 您对哥本哈根的印象

24. 您在哥本哈根旅游满意吗？根据您自己的体验，请在下面的问题上根据满意程度打分。

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>住宿</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>位置</td>
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<td></td>
<td></td>
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<tr>
<td>舒适性</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

#### 游客调查表

您的哥本哈根和北欧之行如何？

Wonderful Copenhagen 是哥本哈根首都区的官方旅游管理局。

为了帮助我们把北欧的旅游事业做得更好，请您回答以下的问题。

填写这个表格大约需要15分钟。

为了表达我们的谢意，我们给您准备了一件小礼品：它是一块有纪念意义的项链，号称 “北欧黄金”的项链，它将会给您带来好运，我们感谢您的合作，祝您旅途一路顺风！

#### 基本资料

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. 性别</td>
<td>2. 年龄</td>
<td>4. 学历</td>
<td>6. 中国的地址</td>
</tr>
<tr>
<td>男</td>
<td>18岁以下</td>
<td>初中以下</td>
<td>北京</td>
</tr>
<tr>
<td>女</td>
<td>18-24岁</td>
<td>初中</td>
<td>上海</td>
</tr>
<tr>
<td>25-34岁</td>
<td>高中</td>
<td>广东</td>
<td></td>
</tr>
<tr>
<td>35-45岁</td>
<td>高中/中专</td>
<td>天津</td>
<td></td>
</tr>
<tr>
<td>45-54岁</td>
<td>大专</td>
<td>河北</td>
<td></td>
</tr>
<tr>
<td>55-64岁</td>
<td>大学</td>
<td>山东</td>
<td></td>
</tr>
<tr>
<td>65岁以上</td>
<td>大学以上</td>
<td>重庆</td>
<td></td>
</tr>
<tr>
<td>3. 英语能力</td>
<td>5. 月工资水平</td>
<td></td>
<td></td>
</tr>
<tr>
<td>涉利</td>
<td>10000元（人民币）以下</td>
<td>北京</td>
<td></td>
</tr>
<tr>
<td>语法</td>
<td>10001-20000元</td>
<td>上海</td>
<td></td>
</tr>
<tr>
<td>听</td>
<td>20001-30000元</td>
<td>广东</td>
<td></td>
</tr>
<tr>
<td>说</td>
<td>30001-40000元</td>
<td>天津</td>
<td></td>
</tr>
<tr>
<td>写</td>
<td>40001-50000元</td>
<td>河北</td>
<td></td>
</tr>
<tr>
<td>阅读</td>
<td>50001-70000元</td>
<td>山东</td>
<td></td>
</tr>
<tr>
<td>简单对话</td>
<td>以上</td>
<td>其他，请注明：</td>
<td></td>
</tr>
</tbody>
</table>

#### 您这次在丹麦的行程

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>7. 您和谁同行？</td>
<td>9. 您为什么到哥本哈根旅游？</td>
<td>11. 您在哥本哈根停留是否是欧洲之行中的一部分？</td>
<td></td>
</tr>
<tr>
<td>(请在所有同行的人上打勾)</td>
<td>(可以在一个以上的空格内打勾)</td>
<td>是</td>
<td></td>
</tr>
<tr>
<td>孩子</td>
<td>度假</td>
<td>是</td>
<td></td>
</tr>
<tr>
<td>朋友</td>
<td>探亲访友</td>
<td>不是</td>
<td></td>
</tr>
<tr>
<td>同事</td>
<td>工作</td>
<td>是</td>
<td></td>
</tr>
<tr>
<td>单独</td>
<td>学习</td>
<td>是</td>
<td></td>
</tr>
<tr>
<td>其他</td>
<td>其他</td>
<td>不是</td>
<td></td>
</tr>
</tbody>
</table>

11.1 如果是，请注明其他的城市：

<p>| | | | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>10. 您在哥本哈根停留多久？</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>是</td>
<td>1 晚</td>
<td>是</td>
<td></td>
</tr>
<tr>
<td>否</td>
<td>2 晚</td>
<td>是</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 晚</td>
<td>是</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4-5 晚</td>
<td>是</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 晚以上</td>
<td>是</td>
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</tbody>
</table>

12. 您是第几次来哥本哈根？

<p>| | |</p>
<table>
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<tbody>
<tr>
<td>第一次</td>
<td>第二次</td>
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<tr>
<td>第三次</td>
<td>五次以上</td>
</tr>
</tbody>
</table>

25. 您这次旅行对哥本哈根最好的印象是什么？

26. 您这次旅行对哥本哈根最差的印象是什么？

27. 如果我们还有一些问题需要，可否请您留下您的 e-mail：

谢谢您的合作！
13. 您是第几次来欧洲？
- 第一次
- 第二次
- 第三次及以上

14. 您在哥本哈根做了些什么？
（可以在一个以上的空格内填写）
- 参观旅游景点
- 参观博物馆/andelier
- 品尝当地风味美食
- 品尝多国风味美食
- 吃中餐
- 购买旅游纪念品
- 购买商品和纪念品
- 购买当地特色食品
- 观看节目演出，听音乐会及茶会
- 参加商务活动，会议，课程
- 参加体育活动（徒步旅行、骑自行车、帆船...）
- 购物

15. 您第一次来哥本哈根之前对哥本哈根有什么印象？
（可以在一个以上的空格内填写）
- 简单方便（不用花很多时间就可以看到很多景点）
- 历史悠久（有很多古老的建筑，雕塑，纪念碑）
- 干净整洁（很少垃圾和污染）
- 绿色城市（有很多公园，森林和绿地）
- 休闲舒适（生活轻松愉快，感觉很安全舒适）
- 现代先进（有高水平的科学技术和现代化的设施）

16. 您的旅行中有没有购物的计划？
- 有
- 没有

16.1 如果有，请您注明去了哪些商店购物。

17. 您到达瑞典之前是否在网上查过哥本哈根的旅游信息？
（可以在一个以上的空格内填写）
- 住宿
- 餐饮
- 购物信息
- 其他信息（旅游景点，饮食，展览馆/博物馆）

18. 您在做旅游计划的时候，认为哪些网页提供的旅游信息是最好的？

www.
www.
www.
- 我没有使用网络查找信息

19. 您在旅馆预订和预定旅馆及其他旅途计划的时候，认为哪类网站是最好的？

www.
www.
- 我没有使用网络

20. 您是否有智能手机和平板电脑？
- 有
- 没有

20.1 如果有，请您注明是否使用过。

21. 您是否在中国的社交网站上注册（比如weibo.com，renren.com，kaixin.com等）？
- 是
- 否

21.1 请注明您在哪些网站注册了。

21.2 您是否已经或准备把你的旅行体验发布在网上？
- 是
- 否

22. 您在旅行的时候，您一般认为什么问题是最重要？根据您自己的看法，请在下面所有的问题上根据重要程度打分。（1到5，1是不重要，5是最重要的）

<p>| | | | | | |</p>
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</tbody>
</table>

22.1 您在旅游中重视的项目

- 首都的历史与文化
- 景点的价格水平
- 景点是否有中文的指示牌
- 有良好的咖啡馆
- 有当地特色的城市
- 可以购买当地特色商品
- 可以在景点购买纪念品
- 可以购买到当地设计的品牌商品
- 参观历史景点和重要的著名景点
- 参观现代和历史风格的景点
- 购买真实的文化展品，体验和城市文化
- 中文版的官方网站
- 中文版的旅游指南
- 您自己可以安排旅行行程
- 由旅行社安排好的行程
- 网上关于你旅游目的地的信息和推荐
- 体验当地的美食文化
- 有时参加旅行和游览
- 尽可能多参观景点

23. 您为什么选择到北欧和哥本哈根旅游？请简要回答您的主要目的。

www.
www.
www.
- 我没有使用网络
Copenhagen Shopping List

Specified shops/brands/locations
(number of respondents)

- ECCO (by 27 respondents)
- Strøget (by 26 respondents)
- Louis Vuitton (by 7 respondents)
- Magasin (by 7 respondents)
- H&M (by 6 respondents)
- Illum (by 5 respondents)
- Tax free shoes in airport (by 5 respondents)
- Burberry (by 3 respondents)
- Zara, NK, Klarlund, House of Amber, Clarks, Gant, Boss, Visty West, Chanel, Hermes, Body Shop, Bulgari, LABL, Levi’s, Georg Jensen, Lego, Field’s (by 1-2 respondents)

Specified items
(number of respondents)

- Watches (by 11 respondents)
- Amber (by 7 respondents)
- Clothes, shoes, hats, supermarket, souvenirs, electronics, locally distinctive shops (by 1-2 respondents)
Stockholm Shopping List

Specified shops/brands/locations (number of respondents)

- NK (by 19 respondents)
- H&M (by 6 respondents)
- Tax free in general (by 5 respondents)
- Åhlens (by 3 respondents)
- Tax free in airport (by 3 respondents)
- Alans, Svenskt tenn, Ecco, Outlet, ICA galaria, Ahales, J&C, Rolex (by 1 respondent)

Specified items (number of respondents)

- Tourist shops/souvenirs (by 3 respondents)
- Clothes, cameras, shoes, gifts, bags and suitcases, jewellery, supermarket, watches, perfumes (by 1-2 respondents)
Helsinki Shopping List

Specified shops/brands/locations (number of respondents)

Stockmann (by 32 respondents)
Louis Vuitton (by 15 respondents)
Iittala (by 8 respondents)
Sokos (by 7 respondents)
Jumbo (by 5 respondents)
Marimekko (by 5 respondents)
Arabia (by 3 respondents)
Kamppi (by 3 respondents)
Chanel (by 3 respondents)
Selo/Sello, Viking ship, cruise ships food dept., Longchamp, Lindex, H&M, Gucci, Fiskars, Fazer, sletu-kortilla, Jack & Jones, WTC, Boss, Swarovski, Ecco, Form, Kappie centre, citymu, Zara, Amber Dream, K city market, Isoomena (by 1-2 respondents)

Specified items (number of respondents)

Watches (by 5 respondents)
Amber (by 3 respondents)
Clothes, leather goods (by 1 respondent)