

# THIS IS THE CHINESE TRAVELER TO COPENHAGEN

RESULTS FROM EXIT SURVEY IN CPH AIRPORT  
BY WONDERFUL COPENHAGEN

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**WONDERFUL  
COPENHAGEN**



# INTRODUCTION

## BACKGROUND

In 2012, Wonderful Copenhagen conducted a survey of approx. 700 Chinese travelers to Copenhagen, Stockholm and Helsinki. The results were unequivocal. Scandinavian destinations held great appeal to the Chinese travelers, but were perceived as being largely inaccessible with no Chinese language information and generally poor service.

These results laid the groundwork of Wonderful Copenhagen's strategic Chinese market project, Chinavia 2013-14. During this period, Copenhagen has seen a tremendous development in terms of becoming visible on Chinese platforms and convenient to Chinese travelers – with launch of Chinese websites, profiles on Chinese social media, Chinese city maps and crash courses to improve the service offers to Chinese guests.

In this report, we present the results of an updated visitor survey of 400 Chinese travelers to Copenhagen, carried out in Copenhagen Airport August 2014.

The new survey enables us to compare data with the results from 2012 – and the report will therefore demonstrate entirely new patterns and developments in Chinese travelers' preferences in relation to travel form and experience with a higher prevalence of individual travel and with more experienced travelers.

The survey has been managed and executed by the Chinavia project and Wonderful Copenhagen in close cooperation with Copenhagen Airport (CPH).



## INDIVIDUAL CHINESE TRAVELER INSIGHTS

Not only the Chinese travel market, but also the individual Chinese traveler is developing rapidly. Both the surveys of 2012 and 2014 provide essential insights into the travel patterns of the Chinese traveler – and in comparing the results of the two surveys, we gain a valuable understanding of the important development in Chinese travel preferences over the past years.

The new 2014 survey clearly shows that Chinese travelers in Copenhagen are becoming more and more individual and independent in their way of traveling.

In 2012, 82% of the Chinese travelers traveled by tour group to visit Copenhagen. Just two years later, in 2014, only about half (56%) are traveling as part of a tour group. In addition, 68% of the tour group travelers indicate a preference towards travelling more independently, if visiting Scandinavia again.

The Chinese travelers' preferences in terms of how and what to experience have also developed. The survey results highlight the importance of local and unique experiences to Chinese travelers. They are actively seeking out travel experiences that reflect local atmosphere and provide a stronger sense of the local way of living.

To Copenhagen as a travel destination, these developments in Chinese travel patterns and preferences will be key to reaching the Chinese market in the coming years. In order to maintain and strengthen market appeal, destinations will need to adapt market approach and communication to match the needs and preferences of the individual and experienced Chinese traveler.

The success of Copenhagen and Scandinavia will depend on our ability to continuously strengthen our online Chinese presence, our ability to provide relevant inspiration and information of unique local experiences to the Chinese traveler both before and during their travel sojourn, and finally our ability to stay updated and at the forefront of the development in the Chinese travel market and in the preferences of the Chinese travelers.

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DATA COLLECTION, METHOD AND RESERVATIONS / BACKGROUND DATA

# KEY FINDINGS

## WHO IS THE CHINESE TRAVELER?

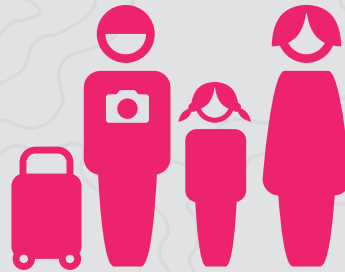
The Chinese traveler is...

25 - 44 years old

Most likely from Beijing or Shanghai

On holiday to Copenhagen, most likely traveling with partner, friends and children

Visiting Copenhagen for the first time



## EXPERIENCE PREFERENCES

The Chinese traveler...

Prefers to travel in an individual travel form

Expects Copenhagen to have a fairytale feeling, to be beautiful, clean and friendly

Thinks the most important thing, when travelling to Copenhagen, is that the city is safe, adventurous and easygoing, and that the traveler is able to get a feeling of the local atmosphere and way of living

Finds that the best experience in Copenhagen is The Little Mermaid and the friendly people. The worst experience in Copenhagen is pick-pocketing

Wishes, upon a potential return visit, to experience: The Little Mermaid, Hans Christian Andersen, Strøget and shopping, Nyhavn, Christiania, local places, local food and in general more local experiences

## USE OF MEDIA The Chinese traveler...



Searches for information and inspiration via general internet searches and through online travel agencies



Searches for attractions and local experiences on the internet before going to Copenhagen



Uses his/her everyday social media platforms when traveling - primarily WeChat, Weibo and Facebook



Downloads travel APPs primarily for directions and city guidance, if any apps are downloaded at all

# WHAT WE NEED TO DO:

ENSURE THE AVAILABILITY OF MOBILE PLATFORMS IN CHINESE WITH DIRECTIONS AND CITY GUIDES FOR COPENHAGEN

ENSURE AVAILABILITY OF TOURIST INFORMATION IN CHINESE SUCH AS STREET SIGNS AND CITY MAPS OF COPENHAGEN

COMMUNICATE LOCAL FOOD AND EXPERIENCES ON RELEVANT CHINESE PLATFORMS

COMMUNICATE ATTRACTIONS IN COPENHAGEN AND THE FAIRYTALES OF HANS CHRISTIAN ANDERSEN ON RELEVANT CHINESE PLATFORMS

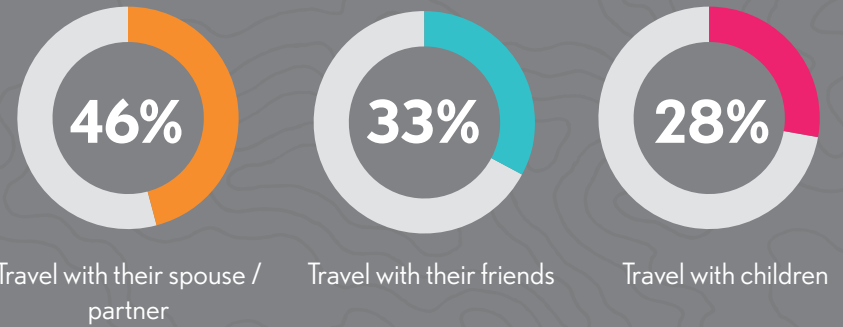
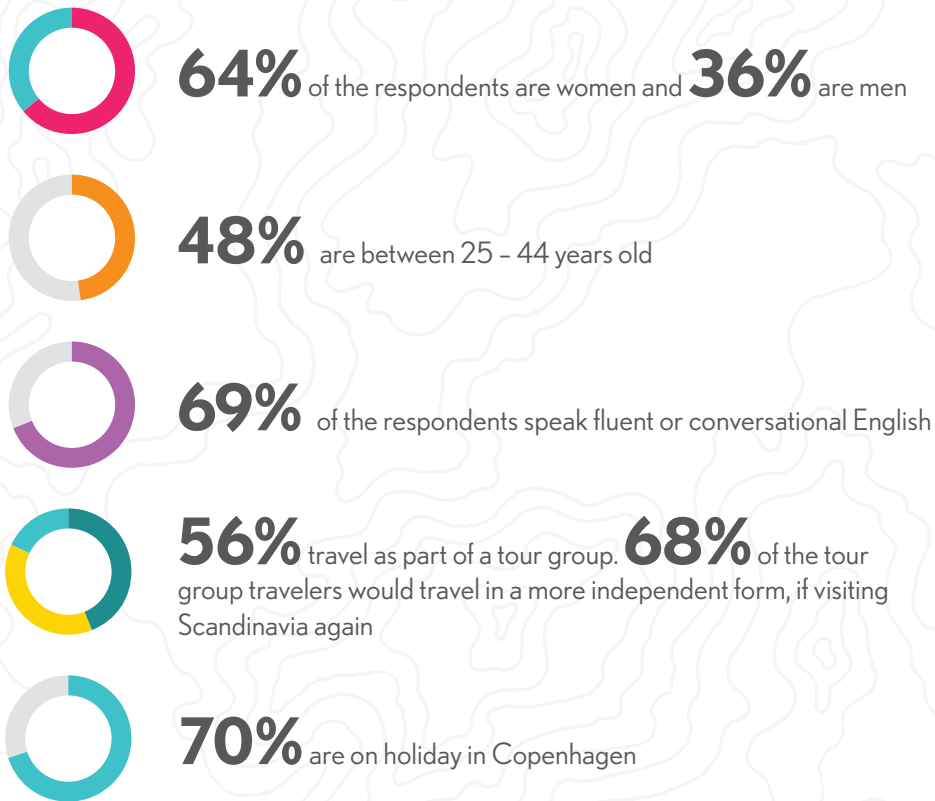
COMMUNICATE TO MEET THE NEEDS AND PREFERENCES OF THE INDIVIDUAL CHINESE TRAVELER

The background of the entire page is a topographic map with contour lines in a light orange color, set against a darker orange background. The lines represent elevation and are distributed across the entire surface.

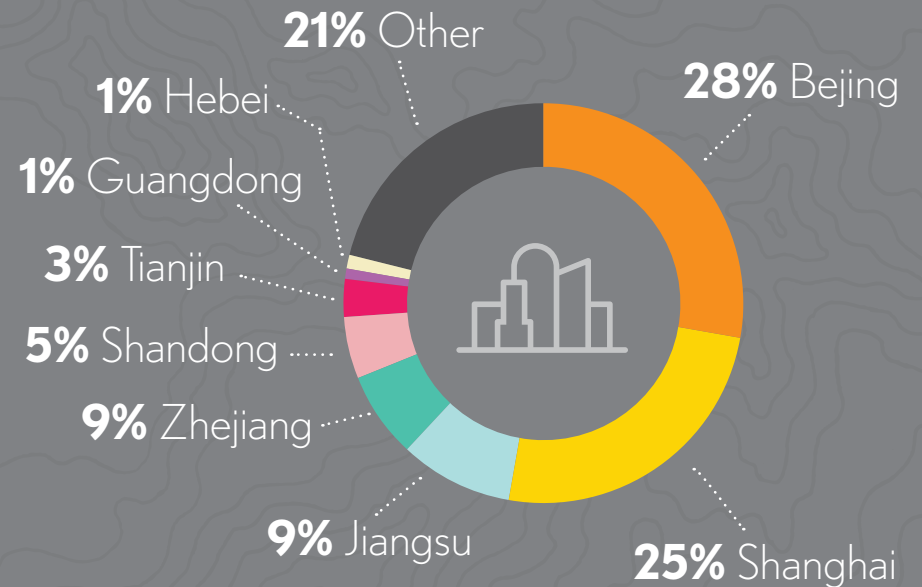
# PROFILE AND TRAVEL FORM

OF THE CHINESE TRAVELER

# OVERALL DEMOGRAPHICS



A MAJORITY OF THE RESPONDENTS ARE FROM BEIJING (28%) AND SHANGHAI (25%)



The 21% that come from another place than the cities listed in the graph, primarily come from Hong Kong (22%), Chongqing (9%) and Anhui province (9%).

# INDIVIDUAL VS. TOUR GROUP TRAVELERS

## INDIVIDUAL TRAVEL PREFERENCES

The survey results demonstrate a very clear development among Chinese travelers towards more independent and explorative ways of traveling.

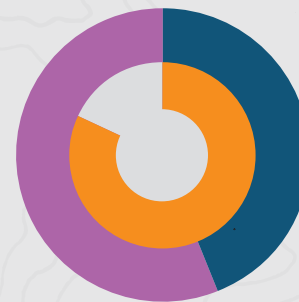
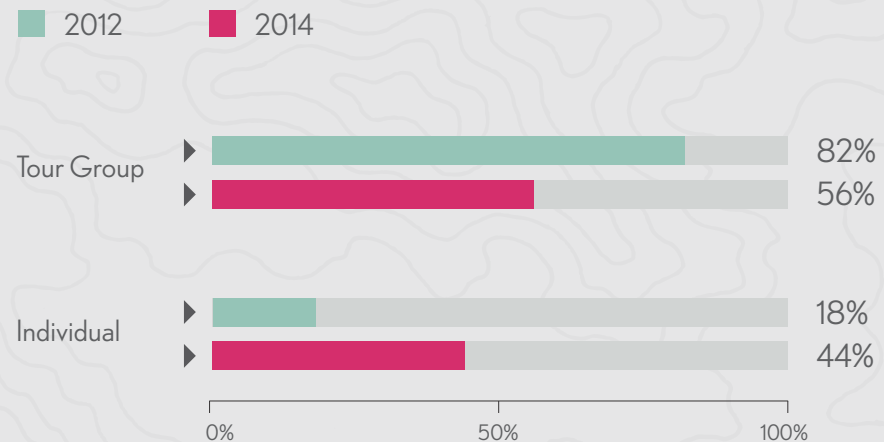
44% of the respondents are traveling independently and 56% in a tour group. In the 2012 Chinavia survey, 18% of the Chinese respondents traveling to Copenhagen traveled individually and 82% as part of a tour group. Over two years, from 2012 - 2014, there is a 26% increase in individual Chinese travelers to Copenhagen.

Furthermore, 68% of the respondents traveling as part of a tour group would, if traveling to Scandinavia again, travel in a more independent form and not as part of a pre-arranged package tour.

Combining the individual travelers and the share of tour group travelers, who indicate a future preference for a more individual travel form, a total of 82% of the survey respondents have individual travel preferences.

Due to the fact that the majority of respondents share a preference for individual travel forms and experiences, the report will in most parts not distinguish between tour group and individual travelers.

## TRAVEL FORM



**44%** are individual travelers

**56%** travel as part of a tour group. 68% of the tour group travelers would travel in a more independent form, if visiting Scandinavia again

**82%** of the respondents have individual travel preferences

# PREVIOUS VISITS

## MAJORITY OF FIRST TIME VISITORS TO COPENHAGEN

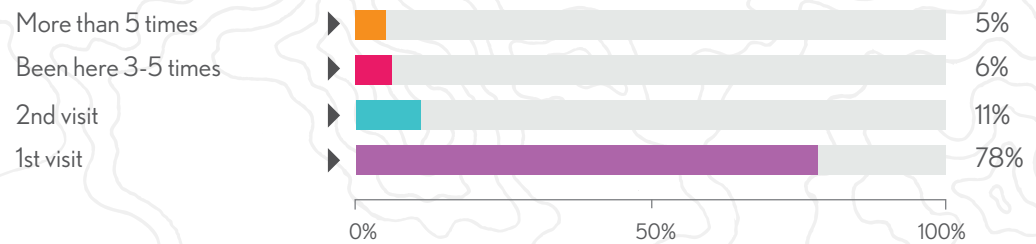
A majority of the Chinese travelers are visiting Copenhagen for the first time (78%). This constitutes approximately the same share of first time visitors as was the case in the 2012 survey. 11% have visited Copenhagen once before and 11% have visited Copenhagen 3 times or more before.

In contrast, only 40% are visiting Europe for the first time. A large share of respondents have visited Europe before (60%).

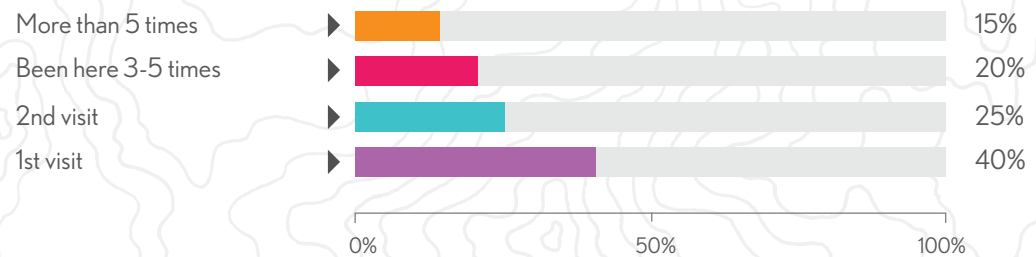
As before mentioned, when looking at the distribution between individual and tour group travelers, 40% of the individual travelers have visited Copenhagen before, whereas only 7% of the tour group travelers have previously visited Copenhagen.

This clearly shows that the Chinese travelers often travel in a more independent form, when revisiting Copenhagen.

## PREVIOUS VISITS TO COPENHAGEN



## PREVIOUS VISITS TO EUROPE



# TRAVEL ARRANGEMENTS

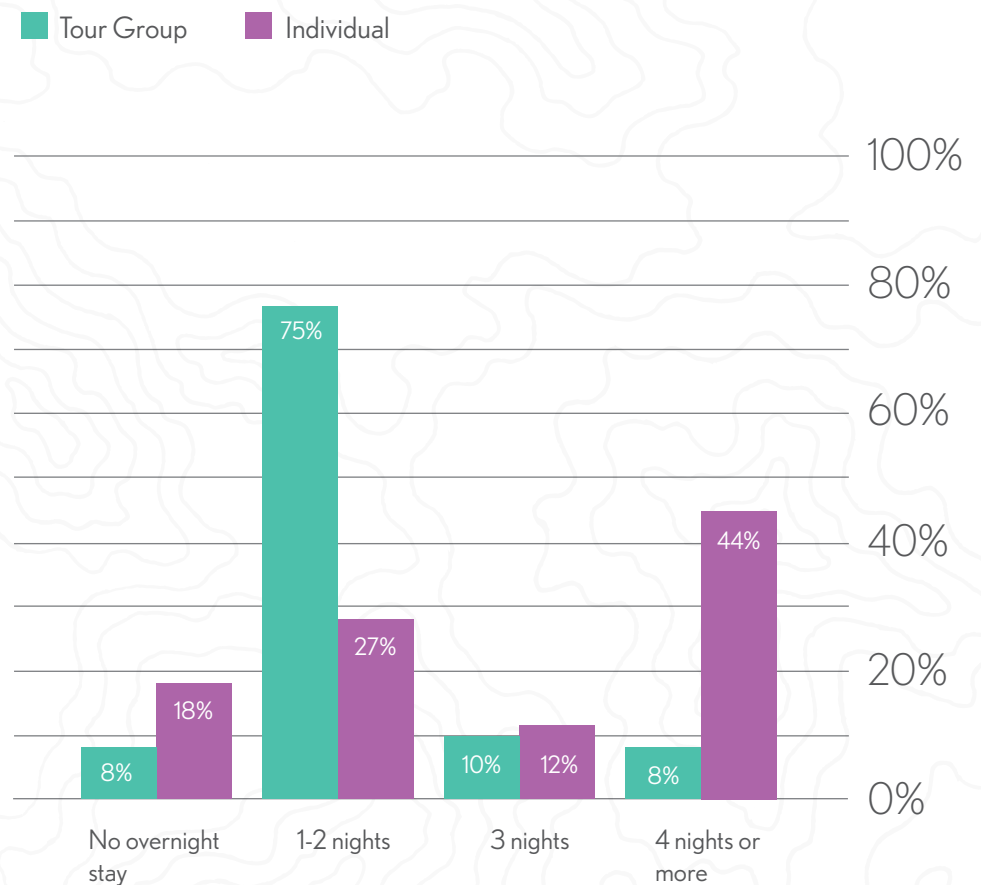
## THE INDIVIDUAL TRAVELERS STAY LONGER AND RETURN

The individual Chinese travelers stay significantly longer in Copenhagen than the tour group travelers. 44% of the individual travelers stay 4 nights or more in Copenhagen, where the majority of the tour group travelers (75%) stay for 1-2 nights.

Both segments are somewhat or very interested in returning to Copenhagen (81% for both).

Furthermore, the survey indicates that the Chinese travelers are likely to take on a more independent travel form if visiting Copenhagen again. Thus 40% of the individual travelers have visited Copenhagen before, whereas only 7% of the tour group travelers are return visitors to Copenhagen.

## OVERNIGHT STAYS



# TRAVEL ARRANGEMENTS

## IN COPENHAGEN ON HOLIDAY

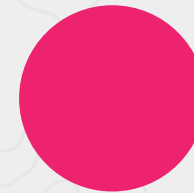
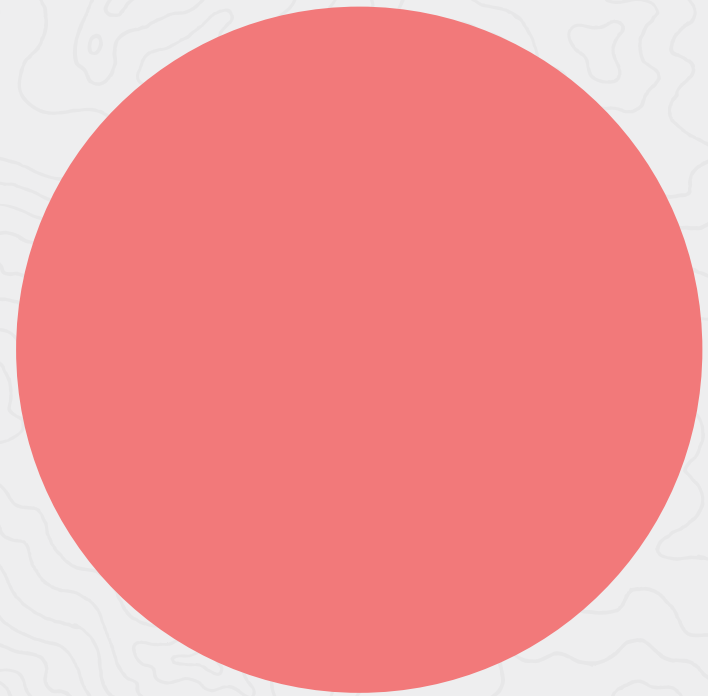
**70%** in Copenhagen on holiday

**19%** in Copenhagen on business

**9%** in Copenhagen visiting friends or family

**6%** in Copenhagen for purposes of study

**1%** in Copenhagen for other reasons



\*The graph adds up to more than 100% because multiple answers were possible

# TRAVEL COMPOSITION

For 88% of the Chinese travelers, their trip to Copenhagen is part of a tour of several destinations.

Copenhagen is primarily combined with the other Nordic destinations – Sweden, Norway and Finland. This also reflects the Chinese perception of the Nordic region (北欧) as a joint travel destination consisting of four countries, namely the Nordic countries.

The below ranking indicates the destinations that are primarily combined with Copenhagen.

SWEDEN  
NORWAY  
FINLAND  
STOCKHOLM  
OSLO  
HELSINKI  
ICELAND  
GERMANY  
BERGEN  
RUSSIA  
FRANCE



# DIGITAL BEHAVIOUR

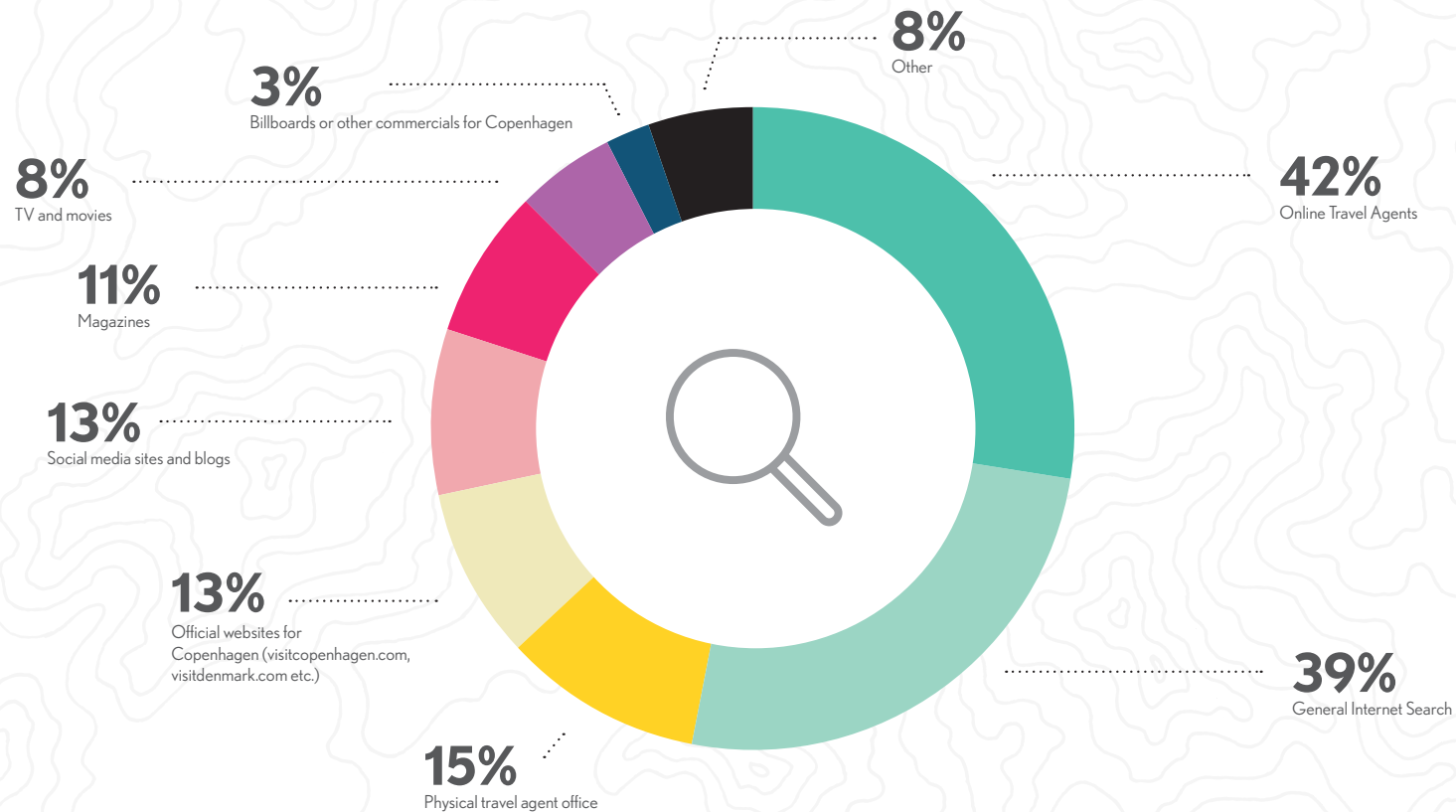
OF THE CHINESE TRAVELER

# SEARCH FOR INFORMATION AND INSPIRATION

## MORE INDEPENDENT INFORMATION SEARCH

In the survey, Chinese travelers were prompted to share their most frequently used sources of inspiration and information for their trip to Copenhagen. The most commonly used source for all respondents is online travel agents (42%) and general internet searches (39%).

Only 15% have used a physical travel agent office, predominantly the tour group travelers. Again, this demonstrates a profile of a more independent Chinese traveler, who is fast becoming more selective in terms of travel inspiration and inspiration.



\*The graph adds up to more than 100% because multiple answers were possible

# TRAVEL RESEARCH

## SEARCHING FOR LOCAL ATTRACTIONS AND EXPERIENCES

When searching for information prior to travelling, the Chinese travelers look for information on local attractions (66%) and local experiences (53%).

The importance of local experiences in the travelers' pre-travel research underlines the Chinese travelers' more explorative travel approach and desire to seek out a local atmosphere and way of living.

### SHOPPING

It is noteworthy that only about 1/3 of travelers search for shopping opportunities and information. In the past years, tax free data have clearly demonstrated that Chinese travelers are lucrative customers with strong purchasing power and high shopping expenditure.

Meanwhile, these new 2014 survey results show a tendency towards less focus on shopping as part of the travel arrangements.

A majority of the Chinese travelers (80%) have a shopping arrangement in their travel itinerary, yet the opportunities to shop are not rated very important by the Chinese travelers.

On a scale from 1 - 5, where 1 is 'Not important' and 5 is 'Extremely important', both the individual and tour group travelers stand very neutral on this matter (3,3).

## INTERNET SEARCH



\*The graph adds up to more than 100% because multiple answers were possible

# SOCIAL MEDIA & CHINESE PLATFORMS

## USE OF SOCIAL MEDIA

72% use their everyday social media platforms when traveling.

The ranked words on the right side show the most used social media platforms for the Chinese respondents – WeChat, Weibo and Facebook as the most common platforms.

Very few download new mobile APPs related to their stay in Copenhagen – 79% haven't downloaded any new mobile APPs. When downloading APPs, it is primarily for directions and city guidance.

It is therefore important to know and understand which social media platforms the Chinese consumers normally use, as their everyday platforms also constitute the most direct platforms for communicating with the Chinese travelers.

The bottom ranked words on the right side indicate that the Chinese travelers mainly use the same social media platforms when travelling as they do on an everyday basis.

## USE OF VISITCOPENHAGEN'S CHINESE SITES

**8%** have visited Visitcopenhagen's official Weibo profile: ([weibo.com/visitcopenhagen](http://weibo.com/visitcopenhagen)).

**16%** may have visited the profile and **76%** have not.

**10%** have visited [Visitcopenhagen.cn](http://Visitcopenhagen.cn), **17%** may have and **73%** have not.

## USUAL EVERYDAY SOCIAL MEDIA PLATFORMS

WeChat

Weibo

Facebook

QQ

## SOCIAL MEDIA PLATFORMS USED ON TRIP

WeChat

QQ

Weibo

Facebook



# VIEW ON COPENHAGEN

BY THE CHINESE TRAVELER

# EXPECTATIONS BEFORE COMING

## A FAIRYTALE WORLD

Many Chinese travelers associate Copenhagen and Denmark with Hans Christian Andersen and the fairytale of The Little Mermaid. Many of the travelers therefore expect to experience a fairytale feeling in Copenhagen. When asked about their expectations to Copenhagen prior to travel, key words used are 'Fairytales', 'Mermaid', 'Beautiful' and 'H.C. Andersen'.

Furthermore, Denmark and Copenhagen are expected to be clean, environmental with fresh air. The Chinese travelers also associate Denmark and Copenhagen with old culture and history. The people in Copenhagen are expected to be friendly, well-organized and well-educated.

## INTEREST IN HANS CHRISTIAN ANDERSEN

In general, Hans Christian Andersen is well-known among the Chinese travelers. 68% of the respondents are familiar with his fairytales. 30% say they may know him and only 2% know nothing about him. As the fairytales of Hans Christian Andersen are part of Chinese obligatory school curriculum, the familiarity with the author is not surprising.

Furthermore, 79% are in some degree interested in experiences in Denmark/ Copenhagen related to Hans Christian Andersen and his fairytales. When asked which Hans Christian Andersen fairytale the Chinese travelers find particularly interesting, the following fairytales are highlighted: **The Little Mermaid, The Little Match Girl and The Ugly Duckling.**

FAIRYTALES  
BEAUTIFUL  
CLEAN  
ENVIRONMENT  
MERMAID  
FRIENDLY  
CULTURE  
FRESH  
H.C ANDERSEN  
OLD

Ranked words describing the respondents' expectations before coming to Copenhagen

# 10 MOST IMPORTANT THINGS

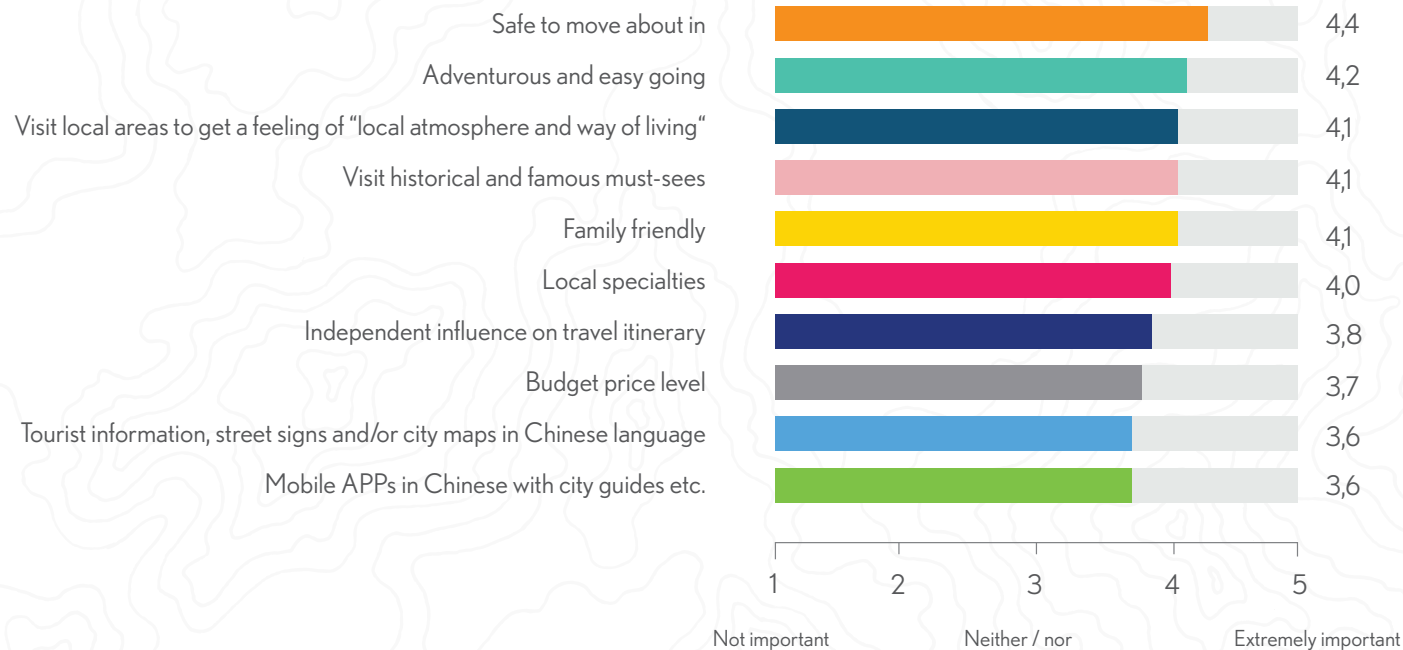
## LOCAL AND EXPLORATIVE EXPERIENCES ARE MOST IMPORTANT

When traveling to Copenhagen, the most important things (4+) to the Chinese tourists, are all elements related to the atmosphere and local feel of the city.

The most important factor is that the city is safe to travel, that the city is adventurous and easygoing and that visitors are able to get a feeling of the local atmosphere and way of living.

Highlighting these factors as most important again point to the fact that Chinese travelers are becoming more explorative.

In second place (3,5 - 3,9), the Chinese travelers highlight factors that are more static and tangible. These factors involve city guides and services to make their travel experience more convenient, including elements like travel itineraries, price levels, tourist information in Chinese and mobile apps with city guides.



# BEST EXPERIENCE IN COPENHAGEN

## THE LITTLE MERMAID AND THE FRIENDLY PEOPLE

Encouraged to share their best experience in Copenhagen, the Chinese travelers respond in a way that matches their expectations before coming. The only exception being the lack of actual fairytale feeling in Copenhagen.

The best experiences of Chinese travelers are highlighted and ranked on the right-hand side and include:

The Little Mermaid, the friendly people, the beauty of the city, the fresh air and environment, Nyhavn and buildings in Copenhagen as well as shopping.

MERMAID  
PEOPLE  
FRIENDLY  
NYHAVN  
BEAUTIFUL  
FRESH  
SHOPPING  
AIR  
ENVIRONMENT  
BUILDINGS

Ranked words describing the respondents' best experience in Copenhagen

# WORST EXPERIENCE IN COPENHAGEN

## PICKPOCKETING IS THE WORST PART OF TRAVELING IN COPENHAGEN

The worst experience for Chinese travelers in Copenhagen is pickpocketing. This is not a common statement in other similar surveys of tourists in Copenhagen. This could indicate that the Chinese are more exposed to this kind of experiences. This could be due to the commonly known fact that Chinese travelers typically carry a lot of cash (due to the inconvenience of using China Union Pay credit cards abroad).

Other bad experiences in Copenhagen include the price level, the weather and the fact that they are not able to get hot water, which is generally considered important by Chinese travelers.

Furthermore, some respondents point to The Little Mermaid as a bad experience, though this is also highlighted as the best experience.

# PICKPOCKETING

WEATHER

EXPENSIVE

HOT WATER

SERVICE

MERMAID

Ranked words describing the respondents' worst experience in Copenhagen

# AREAS FOR IMPROVEMENT

In the survey, Chinese respondents were encouraged to rate the importance of a number of elements related to their travel experience.

Areas of high importance, but low satisfaction are identified as areas with room for improvement.

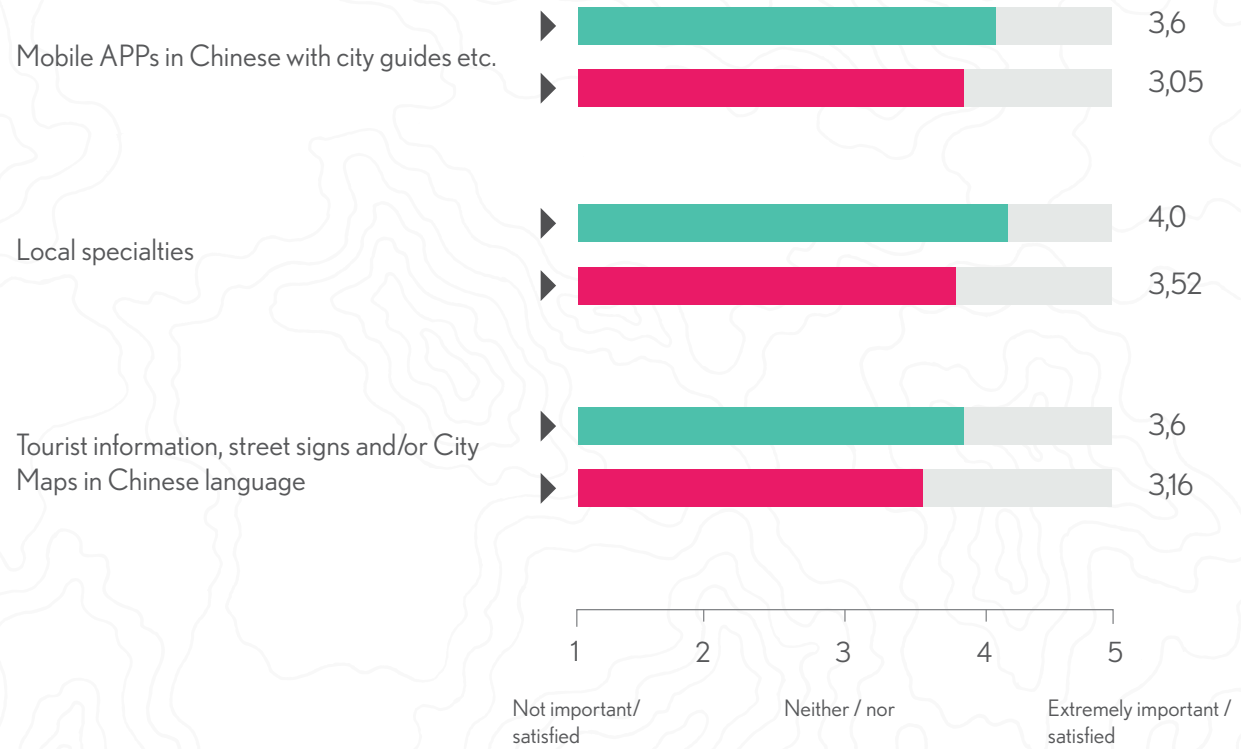
Areas of high importance are those rated 3,5+. Room for improvement is indicated by a gap of more than 0,4 between importance and satisfaction.

These areas include:

- Mobile APPs in Chinese with city guides etc.
- Local specialties.
- Tourist information, street signs and/or city maps in Chinese language

## TOP 3 AREAS FOR IMPROVEMENT

■ Importance ■ Satisfaction



# RETURNING TO COPENHAGEN

## THE CHINESE TRAVELERS WANT TO REVISIT COPENHAGEN

81% of the Chinese travelers state that they are interested in visiting Copenhagen again in the future.

55% are somewhat interested and 26% very interested in returning.

Only 7% are not interested in returning and 12% are neutral on this matter.

## THE CHINESE TRAVELERS WILL RETURN FOR ATTRACTIONS, SHOPPING AND LOCAL EXPERIENCES

When asked what they would like to experience in Copenhagen if revisiting, the Chinese travelers point to attractions such as The Little Mermaid, Hans Christian Andersen, Tivoli and museums in general.

Furthermore, they point to some more local places like Strøget, Nyhavn, Christiania. They also highlight a desire to try local food and in general get more local experiences.

MERMAID  
TIVOLI  
H.C. ANDERSEN  
NYHAVN  
MUSEUMS  
STRØGET  
FOOD  
SHOPPING  
LOCAL  
SIGHTSEEING

Ranked words describing what the respondents would like to experience in Copenhagen if revisiting

The background of the slide is a dark gray color with a white, intricate topographic map pattern consisting of numerous irregular, concentric contour lines of varying thicknesses, creating a textured, mountainous appearance.

# METHOD & DATA COLLECTION

THE CHINESE TRAVELER

# DATA COLLECTION, METHOD AND RESERVATIONS

## DATA COLLECTION

The interviews were conducted during August 2014 in collaboration with market research agency Epinion. All interviews were conducted by Chinese-speaking interviewers.

The sample consists of 400 interviews with Chinese travelers leaving Copenhagen through CPH Airport. All respondents were interviewed by the boarding gate for the two direct SAS flights to Shanghai and Beijing, respectively.

The interviews were carried out via questionnaires on paper for the Chinese tourists to fill out with assistance from the Chinese-speaking interviewers.

## METHOD

Answers from the survey were subsequently entered into the survey programme Analyzer by Chinese-speaking personnel.

Data was analyzed and results summarized in this report by Senior Advisor Mille Marcussen in Research & Business Development, Wonderful Copenhagen.

Data is a combination of statistic data and open answers.

## RESERVATIONS BY DATA COLLECTION

Due to the fact that the survey was conducted via paper questionnaires, it has not been possible to ensure that each respondent filled out the complete survey. As a consequence of this, the base is not consistent in all questions of the survey.

All survey questionnaires have been filled out 80% or above, which means that the base in all questions is sufficient to show developments and patterns for the Chinese traveler, as is the overall purpose of this report.

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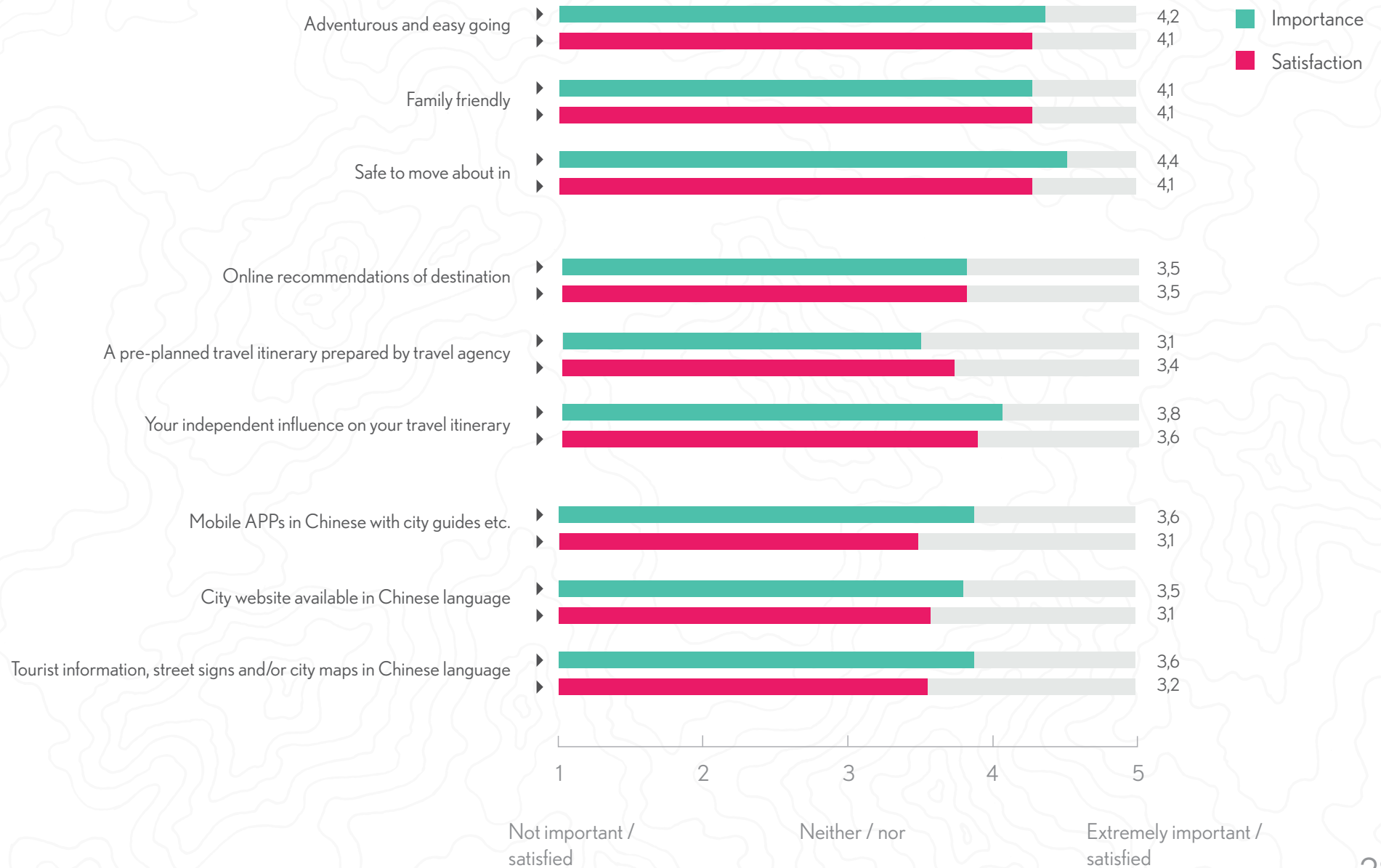
# APPENDICES

THE CHINESE TRAVELER

# ATTRACTIONS / SHOPPING / FOOD / ACCOMODATION

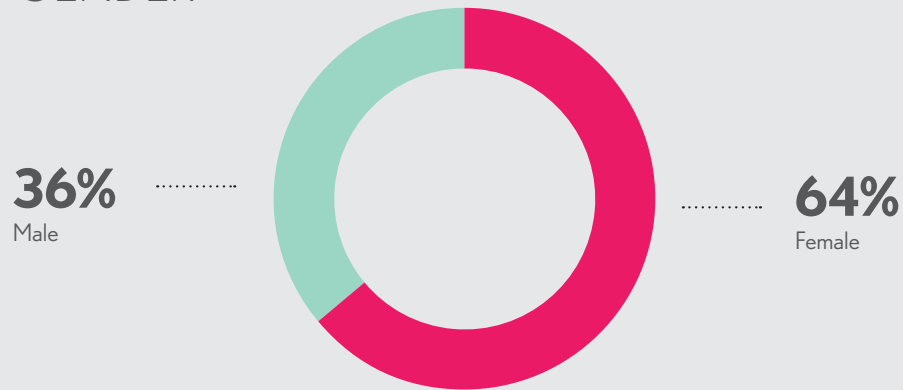


# CITY ATMOSPHERE / PLANNING / INFORMATION

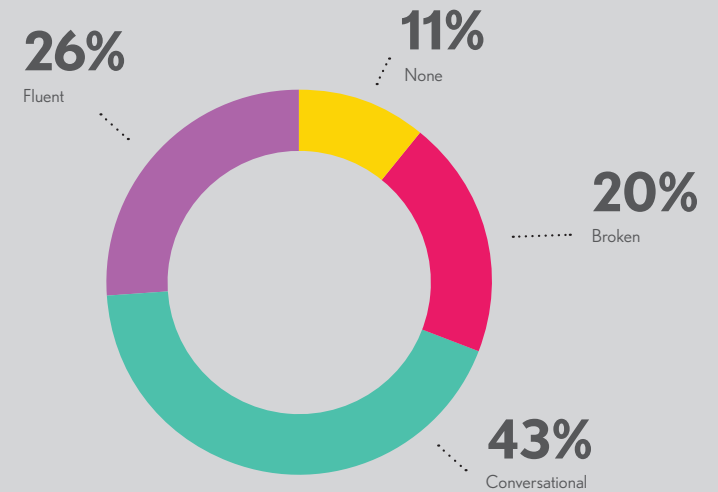


# BACKGROUND DATA

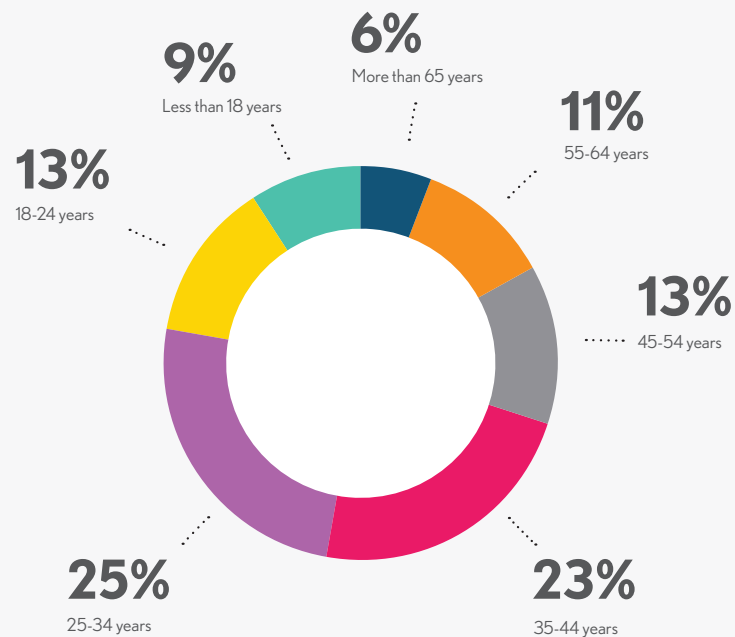
## GENDER



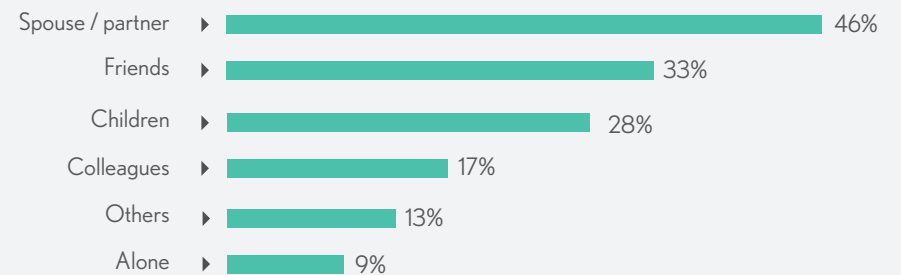
## COMMAND OF ENGLISH LANGUAGE



## AGE



## TRAVELING WITH



\*The graph adds up to more than 100% because multiple answers were possible

# FURTHER READING

- ▶ [CHINAVIA.DK](http://CHINAVIA.DK)
- ▶ [VISITCOPENHAGEN.CN](http://VISITCOPENHAGEN.CN)

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