

China

Market profile 2017



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About the market profile

Continual market, target group and media analyses keep us updated on which travellers have the most potential to increase their travel to Sweden. These analyses enable us to choose the right target group, message and communication channels when we collaborate with the tourism industry.

The market profiles are summaries that have been produced for China and all other of Visit Sweden's international markets. For the other market profiles, see here¹.

The market profile provides insights into:

General country profile

- Country, population and economy
- Holidays and vacation
- Cultural traits

Media profile

- Progress in technology
- Modern travellers are online
- Sharing economy
- Media consumption in China
- Digitalt behaviour
- Visit Sweden's integrated communication

China's tourist profile

- International travel by the Chinese
- Incoming visitors to Sweden
- Overnights in Sweden
- Sweden's accessibility

Target group profile

- Sweden in the eyes of the Global Traveller
- Top 5 activities
- Top 5 information sources
- Which season
- Travel companions

Want to know more?

A collaboration with Visit Sweden includes analyses of the market, target group, context and media for the selected segments².

Contact:

Visit Sweden
Sveav. 21, Box 3030
SE-103 61 Stockholm,
Sweden

¹ 2017 Market Profiles are available for: China, Denmark, France, Germany, the Netherlands, Norway, Spain, the United Kingdom and the United States.

² <http://corporate.VisitSweden.com/marknader/>

General country profile

Country, population and economy

China's overall export growth slowed further in August, pointing to a softening of global demand. Downside risks remain, in particular in the area of US-China trade relations. Household consumption growth also eased. GDP expected growth rate 6.8% this year but to slow to below 6.5% in 2018.³ During the second quarter of 2017, Chinese consumer confidence decreased by -4 percentage points, compared to the fourth quarter of 2016. A change of +/-5 per cent indicates that the economy is changing direction⁴

People

Population⁵ 1, 4 billion, growth rate: +0.4%

Age structure⁶
0-24 years: 30%
25-64 years: 59%
65+ years: 11%
Median age: 37 years

Demographic trend 1990-2020⁷
0-14 years: -28%
65+ years: 175%

Economic indicators

GDP per capita⁸ \$15 400 = SEK 124 124⁹,
world ranking: 104

GDP growth 2016¹⁰ 6.6%, world ranking: 13

Currency & exchange rates (mean value) Renminbin (CNY) has strengthened during 2010-2016 (+21%). 2010-2016 the exchange rate fluctuated between SEK 1.06 in 2010, SEK 1.34 in 2015 and 1,29 SEK august 2017 (per 1 CNY).¹¹

Consumer confidence¹² Quarter 2, 2017: 98 (-4 cf. Quarter 4, 2016)

Holidays

China is a difficult country to grasp when it comes to paid holiday to its employees. Employees who have worked for a company in a coherent year are entitled to five days' leave. The number of days in addition to these may vary between 5 and around 25-30 days depending on which company you work for, your skills and how long you have worked. Foreign companies in China have more flexible rules and usually offer more paid vacation to their employees. The "Golden Week" that falls during National Day has become the peak season for travel and tourism.^{13 14}

The most common national holidays in 2018 are listed in the table below:

Holidays in China 2018¹⁵

| | |
|----------------------|----------------------|
| New Year's Day | 1/1 |
| Spring Festival | 15/2-21/2 |
| Qing Ming Jie | 5/4 |
| Labour Day | 1/5 |
| Dragon Boat Festival | 18/5 |
| Mid-Autumn Festival | 24/9 |
| National Day | 1-7/10 (Golden Week) |

³ Country Economic Forecast China, September 2016, Oxford Economics.

⁴ The Consumer Confidence Index shows households sentiments concerning the economy, and the statistics are internationally comparable. Index levels above/below 100 indicate degrees of optimism/pessimism. A change of +/-5 per cent indicates that the economy is changing direction. Source: Nielsen, Consumer confidence

⁵ CIA World Factbook, www.cia.gov (2017-06-01). Note: All figures are estimates for 2016.

⁶ Ibid.

⁷ Tourism Economics, 2017, <http://www.oxfordeconomics.com> (2017-03-31).

⁸ CIA World Factbook, www.cia.gov (2017-06-01). Note: All figures are estimates for 2016.

⁹ Average exchange rate of the Riksbank (Sweden's central bank), 2017 (1 USD = 8.06 SEK), www.riksbank.se (2017-08-25)

¹⁰ CIA World Factbook, www.cia.gov (2017-07-09). Note: All figures are estimates for 2016

¹¹ Average exchange rate of the Riksbank (Sweden's central bank), 2010-2016, (avser 1 CNY) www.riksbank.se (2017-08-29).

¹² The Consumer Confidence Index shows households sentiments concerning the economy, and the statistics are internationally comparable. Index levels above/below 100 indicate degrees of optimism/pessimism. A change of +/-5 per cent indicates that the economy is changing direction. Source: Nielsen, Consumer confidence,

¹³ <http://www.ibtimes.com/china-golden-week-travel-record-numbers-brave-crowds-gridlock-punishment-bad-behavior-2130340>

¹⁴ <https://www.nytimes.com/2016/10/05/world/asia/china-holiday-travel-golden-week.html>

¹⁵ <http://www.holiday-times.com/public-holidays-china/>

Cultural traits

How people think and act in different situations often varies from country to country. Usually the differences are minor, indistinct, but sometimes they can be more tangible. A vital part of tourism is contact with other people, cultures and languages, but knowing how everyone thinks and acts is an art that few people master fully. However a good start is to be aware that there are differences, and to listen, be flexible, and to realize that many different ways can all be right. Here we present some of the differences between Chinese and Swedish cultures.

The passage below describes common perceived differences, but of course are not true for everyone or in every situation.

Cultural dimensions

The Chinese culture has a higher degree of hard values compared to the Swedish

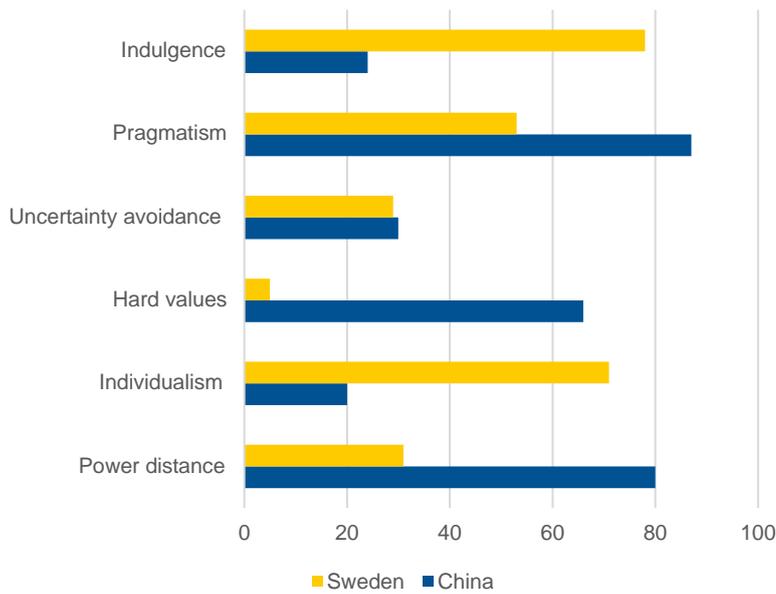
The cultures of Sweden and China are different. In China, hierarchies are more common and more accepted, and status and achievements are more important to the Chinese than to the Swedes. China has a somewhat more relationship-based culture, where they place more value on the family and respect the older generation more than Swedes generally do. And Chinese are more comfortable with ambiguity, which is evident for instance in the Chinese language.

In the section we compare China and Sweden based on six cultural dimensions identified by the Dutch culture researcher Geert Hofstede. The studies that generated the values in the figure below were carried out between 1967 and 1973, with some revision in 2001 and 2010. But they are still used and referred to in various contexts, and Hofstede maintains that culture changes very slowly. Consequently we feel that they fill their function here as well.

Below are Hofstede's dimensions:

- Power distance. This expresses how much people perceive and accept the unequal distribution of power. Countries with low power distance are generally more democratic.
- Individualism vs collectivism. This shows to what extent the individual interacts in groups, such as family or extended family. Western societies tend to be more individualistic.
- Masculinity vs femininity, which are Hofstede's words, or hard vs soft values, sometimes also referred to as tough vs tender. This refers to the degree of traditional differences between gender roles, but also the emphasis placed on achievement and competition, as opposed to cooperation and consensus.
- Uncertainty avoidance. The lower the value, the more one tries to avoid conflict. See figure on following page.
- Pragmatic vs normative. This dimension describes how people relate to that fact that much of what occurs around them cannot be explained. In normative societies most people have a strong need to explain as much as possible. They want to identify absolute truths and feel a need for personal stability. They show a high degree of respect for social conventions and traditions, little tendency to save for the future and a focus on achieving quick results. In pragmatic societies most people feel no need to explain everything, because they believe it is impossible to fully understand the complexity of life. They also believe that the truth depends very much on the situation, context and time. They demonstrate a high capacity to accept contradiction, they adapt to the circumstances, they have a high tendency to save and invest, and they will persevere in order to achieve results.
- Indulgence vs restraint. This dimension considers how much people try to control their needs and impulses, based on their upbringing. An indulgent society allows relatively free gratification of basic and natural human drives related to enjoying life and having fun. A society characterized by restraint suppresses gratification of needs and regulates it by means of strict social norms.

Cultural dimensions, China



Source: Geert Hofstede™ Cultural Dimensions¹⁶

The figure above shows that Sweden and China have different values, in particular for four of the six dimensions: Power Distance, Individualism, Masculinity and Indulgence. That is, in China higher degrees of Power Distance and hierarchies are more common and more accepted. Additionally, Chinese score lower on Individualism, which is reflected in a more relation-based culture where they value family and other social groups more highly.

Further, China is certainly a country with a very pragmatic approach. The difference in the dimension of Indulgence is very evident, with very low points (24 for China). This means they are more restrained, don't place so much emphasis on leisure, and feel that their actions are linked to social norms. Just like the Swedes, the Chinese tend to avoid saying straight out what they think.

¹⁶ Geert Hofstede™ Cultural Dimensions, 1967-73 revised 2001 and 2010, www.geert-hofstede.com/hofstede_dimensions.php (3 July 2015)

Media profile

Progress in technology

- People spend more time in front of screens and in on average, we use the phone 76 times in a day. Almost half of all daily interactions with the mobile are very short. We use less apps but spend more time in them. This creates challenges for new services delivered through own apps, and it may then be better to be available in already established apps.
- Artificial intelligence is expected to provide more travel-related services within a few years. Already today there are services that can understand a voice and answer questions and translate speech into another language.
- In addition to Apple, Google, Facebook, Amazon and Microsoft, China's "BAT Company" includes Baidu (the Chinese equivalent of Google), Alibaba (the Chinese equivalent to Amazon) and Tencent, which owns WeChat, China's Facebook.¹⁷
- WeChat has applied an option to book travel in the app, making it easy and convenient to book on the mobile. Over 80% of foreign Chinese travellers have WeChat accounts.¹⁸ WeChat has 963 million active users per month.¹⁹

Sharing economy

Individuals who buy goods and services from each other are not a new phenomenon, but are now growing rapidly both generally and within travel. Private housing, meaning short term rentals, is usually most noticeable in terms of sharing economics, but at the same time it represents only three percent of the transactions for all international travel in Europe. Companies, such as Airbnb, are expected to grow and develop their business models and more related services.

Airbnb, called "Aibiyang" in China, competes with Tujia. Tujia focuses on the Chinese market, which means they focus on Chinese travellers, whether traveling within China or abroad.

Media consumption in China

The Chinese media landscape is big and relatively complex. According to Danwei, the Financial Times' research company, China has roughly 11,000 daily newspapers and magazines, and over 200 TV channels. It is important to mention that the Chinese media landscape is considered one of the world's most restrictive, partly because of the Chinese authorities' control of how traditional and online media report politically sensitive issues.²⁰ Despite the country's strict censorship, the internet has helped increase the distribution of information and open political discussions.

High level of digitalization²¹:

- 53 per cent of the Chinese population (approx. 731 million) use the internet.
- 57 per cent of the Chinese population have active social media accounts, and 57 per cent are active on social media using their mobile device(s).
- In China there are 1,314 million mobile phone plans.

Chinese people search on Baidu

Baidu is the most used search engine in China with a market share of 76 percent. Therefore, Baidu is considered the best indicator of demand in the Chinese market. In addition, Chinese search engines like Shenma, Haosou and Sogou are popular, although their market shares are significantly lower than Baidu, measuring less than 10 percent each. Google has only 1.8 percent of the market share.²²

By analyzing tourism-related Baidu searches for Sweden from China, we find out the following information, which is also illustrated by graphs on the following page²³:

- General searches make up 71 percent of all tourism-related searches made about Sweden from China, dealing with, for example, destinations, weekend breaks / day trips, package tours and products, tours
- Tourism activities represent 6 percent of all searches, for example, adventure and outdoor life, amusement parks, museums, shopping, fishing
- Accommodation accounts for 23 percent of all searches and is about, for example, camping, bed and breakfast, hostel, hotel
- In total, 156,000 tourism-related searches for Sweden from China were made in 2016.

¹⁷ Visit Swedens Trendrapport 2016

¹⁸ Global Mobile Market Sizing, Phocuswright 2017

¹⁹ World Economic Forum 2017 <https://www.weforum.org/agenda/2017/09/meet-china-s-social-media-giant-everything-you-need-to-know-about-tencent>

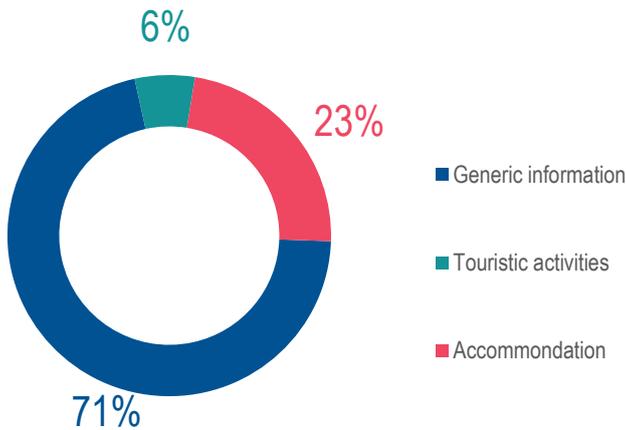
²⁰ Freedom House, Freedom of the press: China, <http://freedomhouse.org>

²¹ Wearesocial, 2017 digital yearbook (2017-08-22)

²² Digital Demand (D²©) - Sweden's Online Tourism Brand Appeal, 2017 (Bloom Consulting)

²³ Digital Demand (D²©) - Sweden's Online Tourism Brand Appeal, 2017 (Bloom Consulting). The study is based on destination-specific keywords related to tourism that are broken down into 3 categories (generic, touristic activities and accommodation) and 63 topics, e.g. natural phenomena, that are related to tourism. The study is done at the country level, and includes each country's language. Searches are about both generic searches (i.e. general tourist information such as holidays, places to visit, travel, tourism, visit) and specific searches (i.e. related to a specific activity or product, e.g. hiking, natural phenomena, shopping), that are done in the search engines Google and Baidu (China) over a one-year period. Note that proper nouns such as names of cities, parks or buildings are NOT included because the analysis is about Sweden's online appeal as a country. Note: The comparisons between the countries are done based on Visit Sweden's 12 prioritized markets.

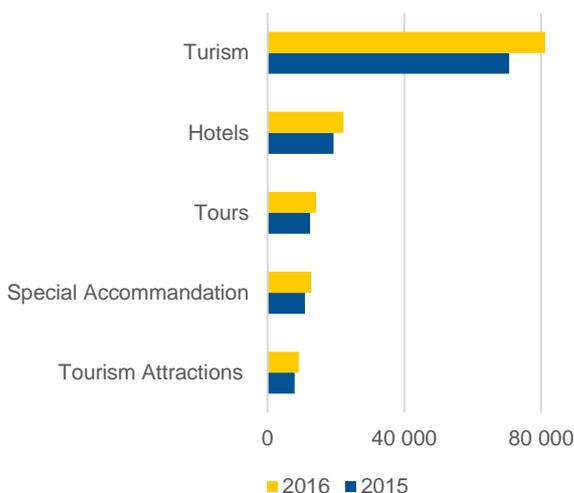
Travel related Baidu searches about Sweden from China



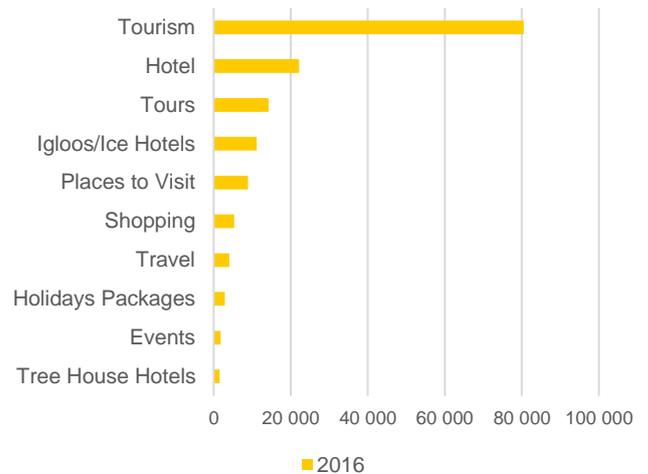
156 | thousand
Searches about Sweden

+16 | %
Increase of searches about Sweden

Top brandtags



The Top 10 micro brandtags



Digital Behavior

Travellers use smartphones. We have many and short interactions with the mobile but switch between screens in different phases while using a service. We may check air fares on the mobile in the subway, but buy tickets in front of the computer screen when we are at home.

A consumer journey from idea to experience can, for example, look like this:

The traveller is inspired by Alibaba's Youku video service, searches for destinations with Baidu, books at Ctrip and pays with WeChat.²⁴

Ctrip is China's largest travel site.

Ctrip had twice as many bookings made from mobile devices than from computer in the first half of 2017. "Destinations need to vary their offers on WeChat, not only with shopping but also the availability of local food. Chinese people have also begun to ask for a range of local activities, such as theme parks and museums. "Medical tourism" is also becoming increasingly popular. " says Roger Qiu, Ctrip's General Manager of Destination Marketing for Europe.²⁵

Below are the top 5 travel-related websites on the Chinese market:

Top 5 Chinese travel websites²⁶

- Ctrip.com
- Alitrip.com
- Mafengwo.cn
- Qyer.com
- Tuniu.com

²⁴ Visit Swedens Trendrapport

²⁵ <https://skift.com/2017/09/22/european-destinations-are-trying-to-stand-out-to-chinese-travelers-on-wechat/>

²⁶ Visit Sweden's local office in China (September 2017).

Visit Sweden's integrated communication

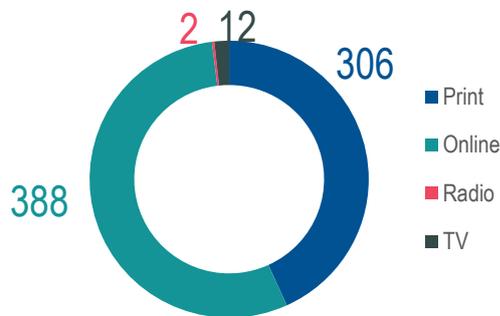
Digital communication is a natural focus for Visit Sweden's integrated communication. Information for the traveller is available on visitsweden.com and Visit Sweden's own social media channels.²⁷

During 2016, Visit Sweden's PR work resulted in Sweden being mentioned as a destination in 727 articles, with a PR value²⁸ of MSEK 108,2.

The most mentioned subjects in China were: Nature and outdoor activities, City, Swedish Lifestyle, Food & beverages, Outdoor - Winter.

Visit Sweden's PR work resulted in Sweden being mentioned in both print and online.

Articles per media channel 2016



Below are comments from Visit Sweden's PR department regarding the media landscape in China.

"Exactly like what is happening in many other countries, traditional media is facing very tough competition with new media, but we still believe some big international titles are using quality content to attract their readers, most of the traditional media has developed their own social media channels to provide variety of information and keep readers' loyalty and interaction.

Blogger and KOL²⁹ are still very popular channels to work with and there are more of niche bloggers stand out, focusing on art/design, gourmet etc. Quite many of them also regularly contribute articles to traditional media (magazine/newspaper), they also have their own subscription account on WeChat platform (which is more like a combination of blog, Facebook and Instagram). We are working with bloggers/freelancer as well as KOLs to promote Sweden to different segment of target audience.

Video media is getting hugely popular nowadays, more and more people tend to watch news, TV shows, travel programs online, therefore when we arrange press trip, we will also take video footage to publish online as well as add it to the digital version of the magazine. VR is becoming very popular, quite a few tourism bureaus begin to use it for destination marketing. Livestreaming has been experiencing a downturn after the flourishing year in 2016. Up to mid-2017, over 100 livestreaming platforms have been closed down. The government strengthened its control on many platforms' seductive contents that was considered to be against social morality."

²⁷ <http://weibo.com/visitsweden>

²⁸ PR value is a calculation of what the publicity would have cost if it had been purchased. The calculation includes advertising costs, article size and brand exposure. Negative articles get no PR value. Because an editorial news item is seen as having more credibility than an ad, the advertising cost is multiplied by a PR factor of 2.4. For printed magazines, the advertising costs are for a full-page ad, and for online media, for a top banner.

²⁹ KOL=Key Opinion Leader http://www.ciccorporate.com/index.php?option=com_content&view=article&id=1374%3Athe-evolution-of-chinese-social-media-in-2017&catid=112%3Aarchives-2017&Itemid=223&lang=en

China's tourist profile

International travel by the Chinese³⁰

In 2016, Chinese travellers made 281 million overnights abroad. This equals 11 per cent of all Chinese commercial overnights, both domestic and international. Of all the Chinese commercial overnights abroad, 0.1 per cent were in Sweden.

Commercial overnights abroad by Chinese increased by 304 per cent from 2008 to 2016, while for Sweden this figure was 220 per cent.

When comparing the number of international arrivals by Chinese with the country's total population, i.e. travel intensity, the figure is low: 0,1 per cent per person and year.

Among European countries, in 2016 Sweden ranked 8 in a ranking of foreign destinations for Chinese travellers. (Finland is in position 11, Denmark 18, and Norway is not in the top 20 destinations.)

Top 5 European destinations for Chinese



0.1 | %
Share of international overnights in Sweden in 2016

304 | %
Increase in international overnights, 2008–2016

220 | %
Increase in Swedish overnights, 2008–2016

³⁰ Tourism Economics, 2017, www.oxfordeconomics.com (2017-06-10).

Sweden in focus

Incoming visitors to Sweden³¹

With 73,000 visits (same-day and overnight visits), Chinese visits made up 0.4 percent of all foreign visits in 2013, according to the IBIS border study.

72 %

of Chinese visitors travel to Sweden by air.

941 SEK

is the amount Chinese visitors spend per person and day. The 2013 average for all international visitors in Sweden: 957 SEK.

Incoming visitors to Sweden

Overnights in Sweden

With accommodation statistics from Tillväxtverket/SCB, we get information about “Where in Sweden do people travel, and what accommodation do they choose”? Chinese visitors spent 323 178 overnights in 2016, up 25 per cent from 2015.³²

| | Chinese | Foreign | Share |
|-----------|---------|------------|-------|
| 2008 | 100 886 | 11 963 917 | 1% |
| 2015 | 257 978 | 15 174 651 | 2% |
| 2016 | 323 178 | 15 593 726 | 2% |
| 2015-2016 | +25 | +3% | |

Source: Tillväxtverket/SCB³³ (2017)

Note: Refers to overnights in hotels, holiday villages, youth hostels, campsites and commercially arranged private cottages and apartment rentals.

The table on the following page shows that Stockholm County has the highest share of overnights, followed by Västra Götaland County and Värmland County. For 2016 Stockholm County has the biggest increase in overnights, in absolute numbers and Örebro County has the biggest increase in percentage points. For 2016, Östergötlands County dropped the most in absolute numbers and Gävleborgs County in per cent.



³¹ The IBIS border study: In 2014 there were 19.9 million visits (+6% cf. 2013) in Sweden by residents of other countries. About IBIS: During the period 2011-2014 Markör Marknad & Kommunikation, on behalf of Tillväxtverket (the Swedish Agency for Economical and Regional Growth), carried out a comprehensive study of incoming visitors to Sweden, in order to learn more about incoming tourism to Sweden. The study takes the form of personal interviews (about 20,000 interviews per year) of incoming visitors at Sweden's most frequented border crossings, i.e. airports, ferry terminals, road crossings, trains etc., when leaving the country. There are also phone interviews in Finland and Norway. www.tillvaxtverket.se/ibis (11 July 2015). For China the results from 2013 were used.

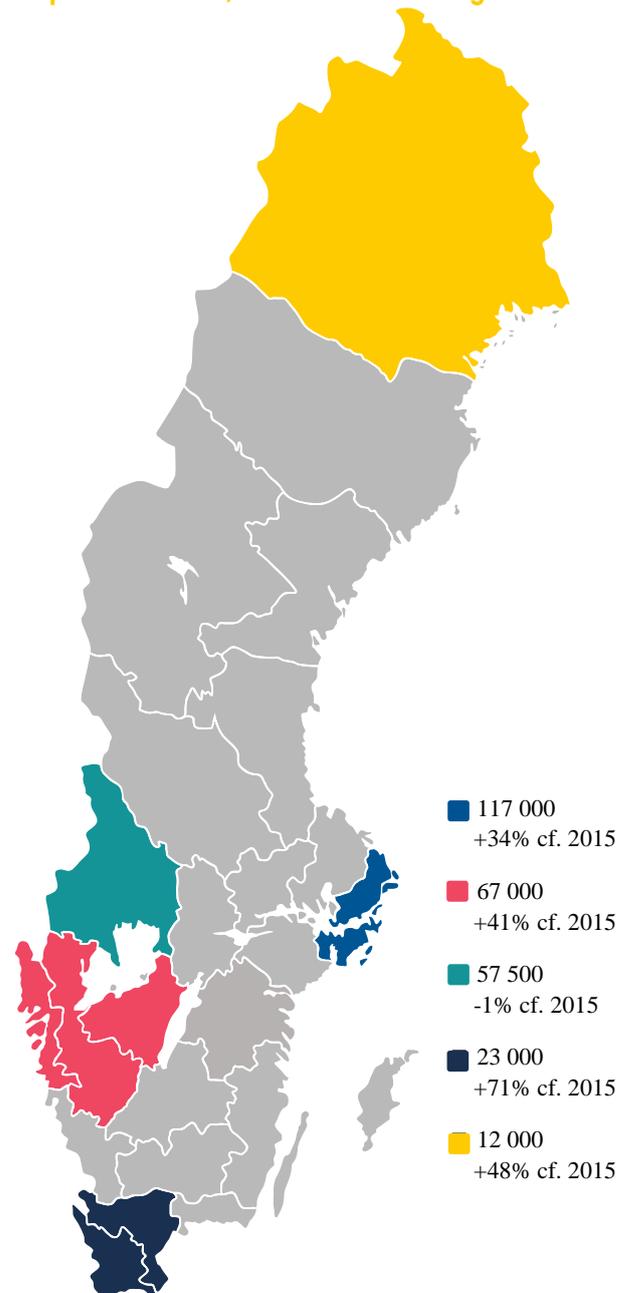
³² Tillväxtverket/SCB 2017, <http://www.scb.se/hitta-statistik/statistik-efter-amne/naringsverksamhet/inkvartering/inkvarteringsstatistik/>

³³ Tillväxtverket/SCB 2017, <http://www.scb.se/hitta-statistik/statistik-efter-amne/naringsverksamhet/inkvartering/inkvarteringsstatistik/>

Overnights from China 2016

| Region/County | Overnights 2016 | Change, overnights 2016 jfr 2015 | |
|----------------------------|--------------------|--|------------|
| | | absolute | in % |
| Greater-Stockholm | 117 465 | 30 030 | 34% |
| Greater-Göteborg | 54 795 | 13 526 | 33% |
| Greater-Malmö | 19 203 | 8 668 | 82% |
| Stockholms County | 117 476 | 30 041 | 34% |
| Västra Götalands County | 67 040 | 19 529 | 41% |
| Värmlands County | 57 522 | -432 | -1% |
| Skåne County | 23 054 | 9 536 | 71% |
| Norrbottnens County | 11 823 | 3 860 | 48% |
| Östergötlands County | 9 872 | -2 668 | -21% |
| Örebro County | 7 847 | 4 553 | 138% |
| Södermanlands County | 7 430 | 642 | 9% |
| Jönköpings County | 6 426 | 1 479 | 30% |
| Dalarnas County | 5 507 | 1 166 | 27% |
| Uppsala County | 1 952 | -717 | -27% |
| Kronobergs County | 1 325 | -567 | -30% |
| Blekinge County | 1 321 | 54 | 4% |
| Västmanlands County | 1 151 | -155 | -12% |
| Västerbottens County | 784 | -746 | -49% |
| Hallands County | 777 | 176 | 29% |
| Västernorrlands County | 561 | 162 | 41% |
| Jämtlands County | 399 | 114 | 40% |
| Kalmar County | 391 | 44 | 13% |
| Gävleborgs County | 321 | -648 | -67% |
| Gotlands County | 199 | -223 | -53% |
| Sweden | 323 178 | 65 200 | 25% |

Top 5 counties, based on overnights 2016



Source: Tillväxtverket/SCB (2017)

Note: Overnights in hotels, holiday villages, hostels, campsites and commercially arranged private cottages and apartment rentals in Sweden from China, by county, 2016. Figures for the major cities and surrounds; and for Sweden excluding the major cities do not include commercially arranged private cottages and apartment rentals.

When it comes to overnights by accommodation type in Sweden from China, hotels dominate with 94 per cent and continued to increase in 2016, by +27 per cent.

On a monthly basis, the figure below shows an increase for every month in the past year. The biggest increase was in December (+51) followed by January to June with between 30-38 per cent.

The most common months to visit Sweden are still June to September.

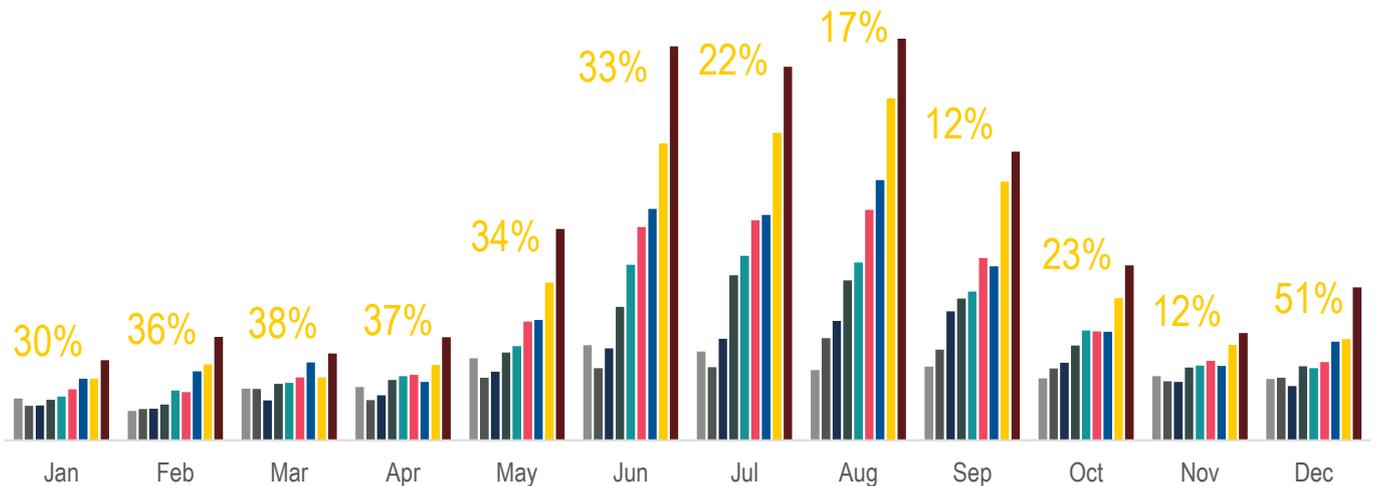
Overnights by accommodation type in Sweden from China 2008-2016

| Overnights at | 2008 | 2015 | 2016 | Change 2016 jfr 2015 | Change 2016 jfr 2008 | Average annual growth 2008-2016 |
|------------------|----------------|----------------|----------------|-------------------------|-------------------------|------------------------------------|
| Hotels | 89 731 | 237 966 | 302 277 | 27% | 237% | 16% |
| Holiday villages | 254 | 2 436 | 2 453 | 1% | 866% | 33% |
| Youth hostels | 10 834 | 17 250 | 17 797 | 3% | 64% | 6% |
| Campsites | 5 | 137 | 382 | 179% | 7540% | 72% |
| *SoL | 62 | 189 | 269 | 42% | 334% | 20% |
| Totalt | 100 886 | 257 978 | 323 178 | 25% | 220% | 16% |

Source: Tillväxtverket/SCB (2017) *Commercially arranged private cottages and apartment rentals

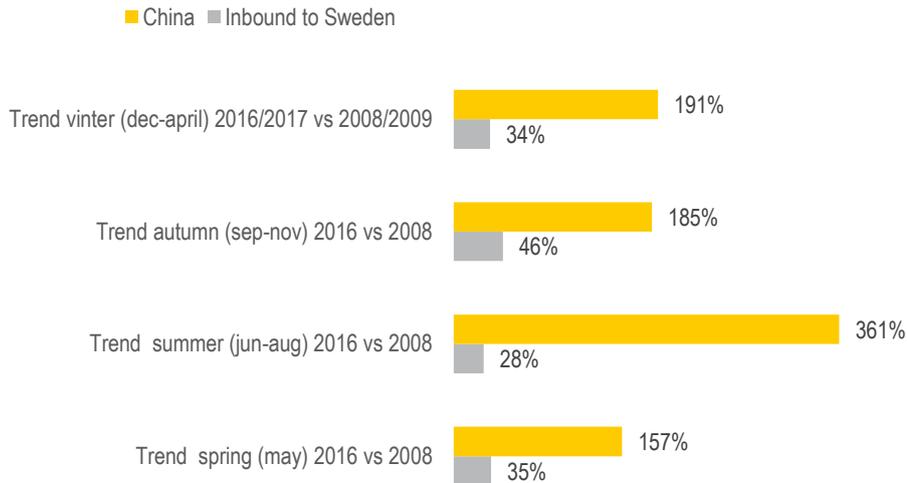
Overnights in Sweden from China, by month 2008-2016

■ 2008 ■ 2009 ■ 2010 ■ 2011 ■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016



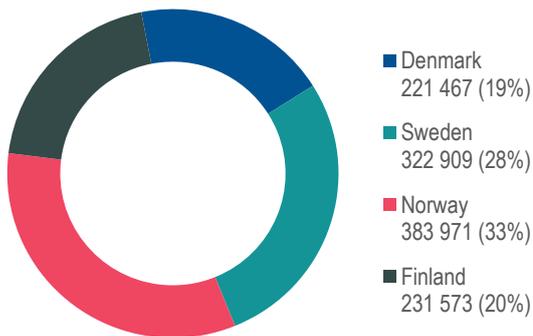
Source: Tillväxtverket/SCB (2017). Growth percentage from 2015 to 2016

Change, overnights from China and Inbound to Sweden



Source: Tillväxtverket/SCB (2017).

Chinese overnights in Scandinavia

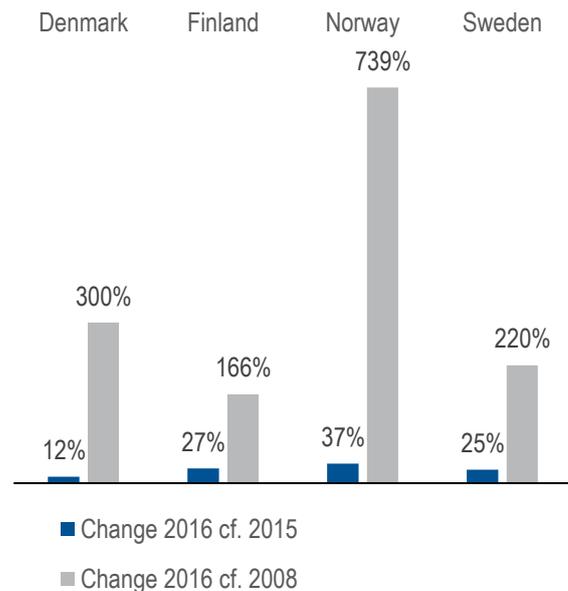


Source: Statistics offices of each country. Refers to Chinese overnights in hotels, holiday villages, youth hostels and campsites (i.e. not commercially arranged private cottage and apartment rentals) in Scandinavia 2016

This chart shows overnights in hotels, holiday villages, hostels and campsites from China in Sweden and its Nordic neighbours.

Sweden, with 28 per cent, has the second largest market share (after Norway 33 per cent) for overnights in hotels, holiday villages, hostels and campsites.

Change, overnights from China in 2016, compared to 2015 and 2008



From 2015 to 2016, overnights in Sweden from China increased by 25 per cent, compared to 37 per cent in Norway and 27 per cent in Finland. From 2008 to 2016, Norway increased the most (739 per cent), compared to 220 per cent in Sweden (323 178 overnights)

Sweden's accessibility

There are many ways to get from the Beijing, Shanghai and Guangzhou metropolitan areas to Sweden. The most common are to fly via Copenhagen, Helsinki, Frankfurt, Munich or Moscow.

Air China has daily flights from Beijing to Stockholm during summer, and five days a week in winter and spring (November-May).

SAS has daily flights from Beijing and Shanghai to Sweden via Copenhagen. Direct flight from Hong Kong to Stockholm, five times a week.

Finnair has daily flights from Beijing and Shanghai. Daily flights from Hong Kong with 3 extra flights per week until October 2017. Four flights per week from Chongqing. Three flights per week from Xi'an until end of Oct. Four flights per week from Guangzhou until end of Oct

Emirates, Qatar Airways and Turkish Airlines are also used by some tour operators in southern China.

Source: Visit Sweden China. Note: Subject to changes that occur continuously after the update in October 2017

Target group profile

Introduction

Competition for international travellers is very tough. Against this backdrop, Visit Sweden has carefully analysed several geographical markets, and identified an affluent target group with a lot of potential to choose Sweden as a destination. We call this group the Global Traveller.

Visit Sweden's study³⁴, comprising over 1 200 people between 20 and 55 years of age from the Beijing, Shanghai and Guangzhou metropolitan areas, investigates factors such as the target group's knowledge of Sweden, what they want to do when they get to Sweden, and which information sources they use, prior to a trip.

The following section presents results based on responses from the target group 'Global Traveller', and from other studies of Chinese travellers who have been abroad.

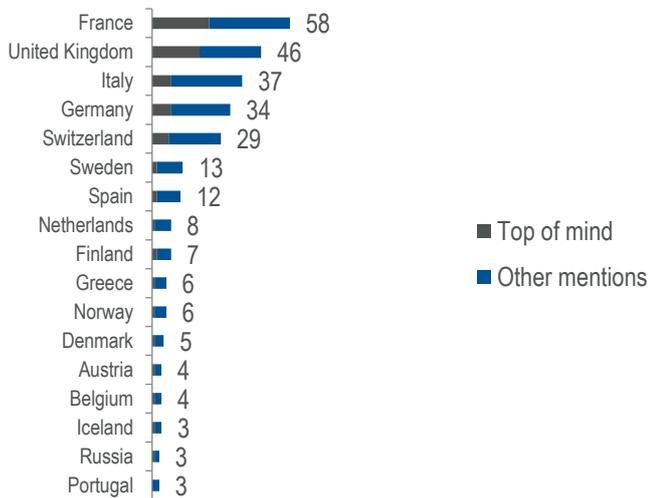


³⁴ China research 2016, Visit Sweden/SSI

Large growth potential in China

Chinese love to discover the world - including Sweden. In 2016, Chinese travellers had 281 million commercial overnights abroad, and from 2008 to 2016 Chinese commercial overnights in Sweden increased by 220 per cent. Below is a presentation of what Chinese travellers want from a trip to Sweden or other international destinations.

Sweden in the eyes of the Global Traveller³⁵



When Chinese Global Travellers think about a European holiday, they think primarily about France, the UK, Italy and Germany. Sweden is in 6th place, with a recall of 13 per cent.

Top 5 activities³⁶

1. Experience cities (entertainment, museums, restaurants) (71%)
2. Culinary experiences (experience good food, drink and restaurants) (64%)
3. Experience Swedish culture, traditions and lifestyle (61%)
4. Shopping (52%)
5. Travel around in Sweden (50%)

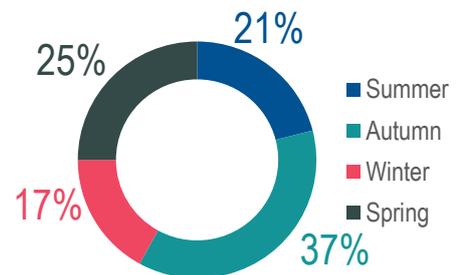
If they travel to Sweden, most travellers want to experience cities, good food and drink, and Swedish culture, traditions and lifestyle. Shopping is generally an important part of a trip for Chinese travellers, and this applies when visiting Sweden as well.

Top 5 information sources prior to a trip to Sweden³⁷

1. Website of major travel portals (69%)
2. Website of travel agency/tour operator (50%)
3. Views of other travellers, via travel blogs or rating sites e.g. Tripadvisor (48%)
4. Social media, e.g. Weibo, Wechat (46%)
5. Website of tourism organizations (42%)

Which season³⁸

Almost 4 in 10, made their most recent (private) international trip during the autumn, especially during the National Holiday in October. But at other times as well.



Travel companions

On their most recent European trip, 5 of 10 travelled with an adult (their partner). 22 per cent travelled alone. 20 per cent travelled with friends or co-workers and 19 per cent with their family, including children under 18.³⁹

53% travelled with an adult (their partner)

Group travel has had a large share in the Chinese travel market, both for domestic and international. A Phocuswright study shows that 66 per cent travelled with a group on their latest trip abroad.⁴⁰

The same applies to a potential trip to Sweden. In this case, a majority would prefer to travel with a group - either for part or all of the trip.⁴¹

36% want to visit Sweden as a fully independent traveller (FIT)

62% want to visit Sweden with a group

³⁵ China research 2016, Visit Sweden/SSI

³⁶ Ibid.

³⁷ China research 2016, Visit Sweden/SSI

³⁸ The Rapid Rise of China's Outbound Millions, Phocuswright 2016

³⁹ Ibid.

⁴⁰ The Rapid Rise of China's Outbound Millions, Phocuswright 2016

⁴¹ China research 2016, Visit Sweden/SSI

Summary

Sweden's tourism offer is multi-faceted and highly varied, depending on season, geographical region, cultural aspects and infrastructure, to name just a few factors. And the target group's wishes are just as diverse.

Knowledge of the Global Traveller helps us match Sweden's offer with the target group's wishes, i.e. what they want to do, what sort of accommodation they want, in which season want to visit Sweden and what sort of trip they envisage. Understanding the various segments and what motivates them enables us to more profoundly understand the reasons for holidaying in Sweden. All our efficient communication is aimed at these segments, and what and how we communicate is based on their realities. By telling them about the things that most interest them, we increase their desire for Sweden.

Before every important marketing campaign or activity that Visit Sweden plans together with various partners, the results are analysed in much more detail than in this general presentation.

Want more information about how you can be involved in international marketing? Contact Visit Sweden, International Business Development and Partnerships, 08-789 10 00.

On corporate.visitsweden.com you'll find contact details for our international offices and Visit Swedens assignment.

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Market profile China 2017

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Enquiries: analys@visitsweden.com