

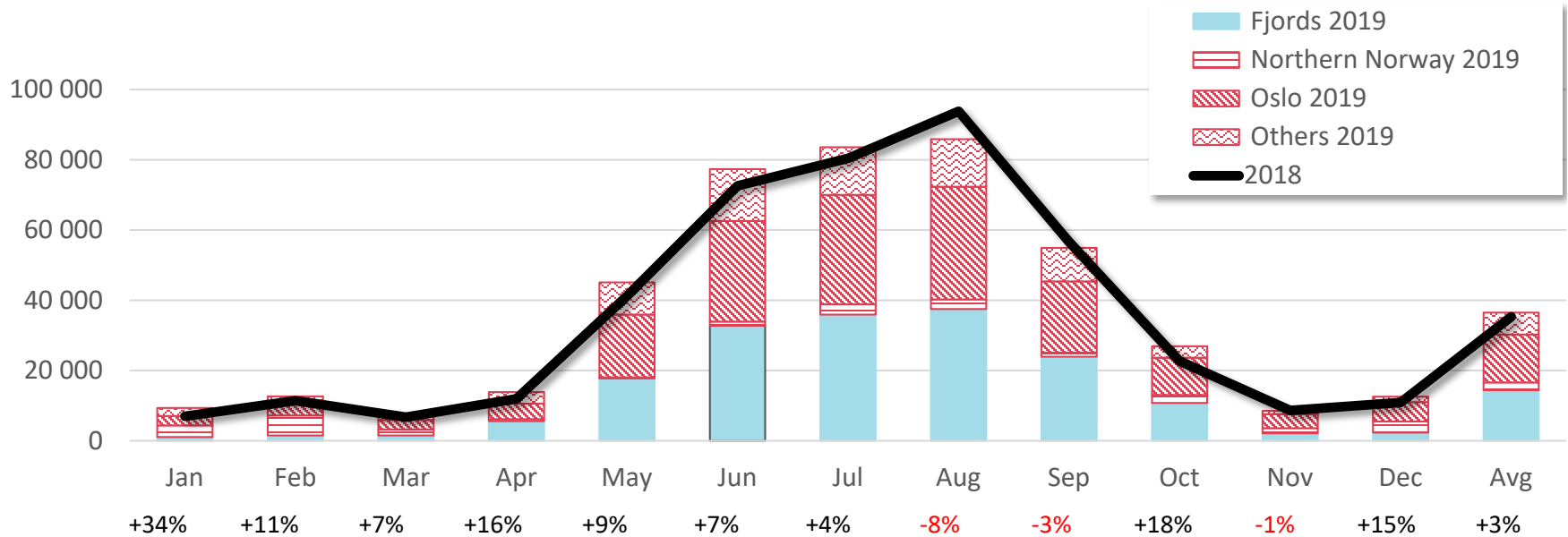


China 2020

Market Insight

Visitor Statistics China 2019

2019 vs 2018



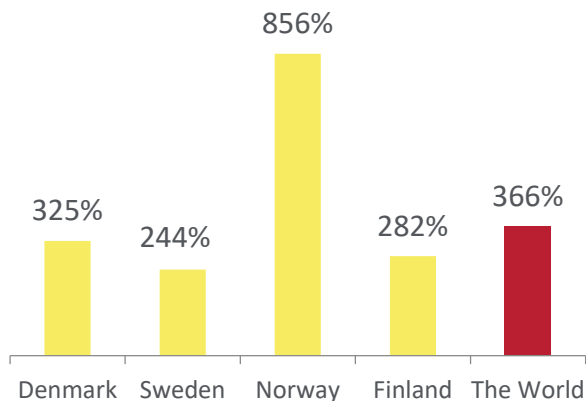
China – Fastest growing region

- In 2018, around 10 % of China's 1.4 billion inhabitants travelled internationally
 - 78% travels within Asia Pacific
 - 22% travels to the rest of the world
- In H1 2019, Chinese arrivals to the world reached to 81million, to Europe over 3 million (up 7.4%)

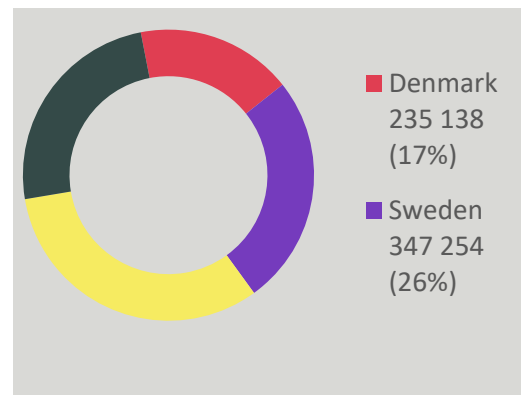


Chinese Travel in the Nordic

Growth in guest nights
2008-2018



Shares of guest nights (2018)

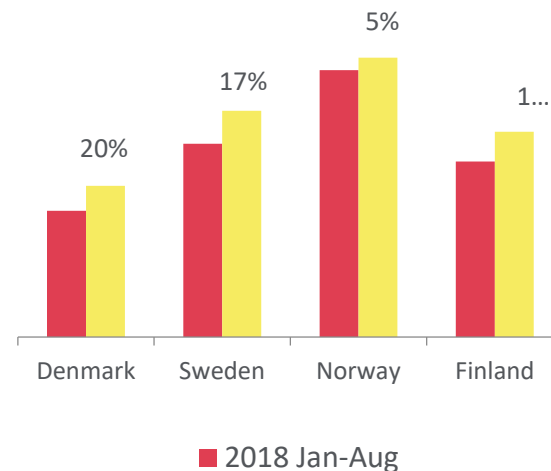


Chinese Travel in the Nordic

Guest Nights (Jan-Aug 2018 vs Jan-Aug 2019)

15%

Average growth
Jan-Aug 2019

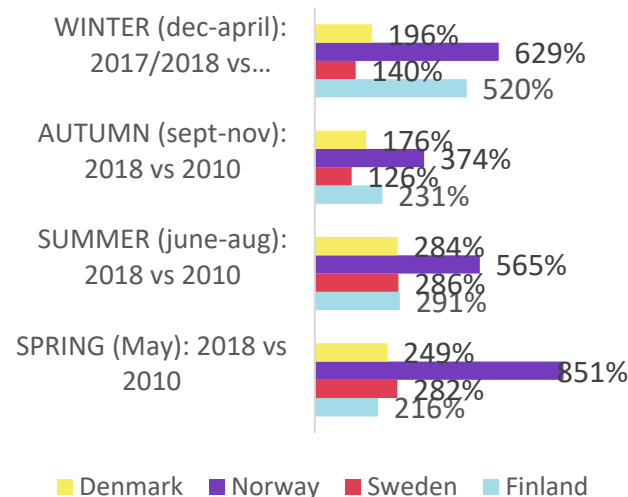


Chinese Travel in the Nordic

Development in seasons 2018 vs 2010

Norway has received the greatest development in all seasons.

On average, spring has had the strongest development, while summer and winter have increased slightly more than autumn.



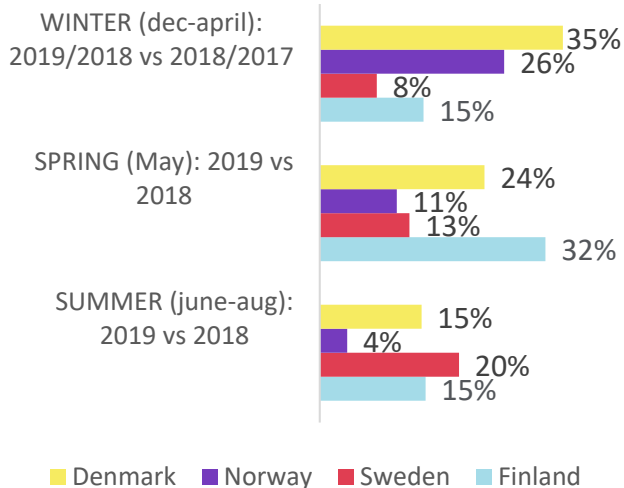
Chinese Travel in the Nordic

Development in seasons 2019 vs 2018

Denmark has had the strongest growth in winter 2018/2019

Finland has had the strongest growth in spring 2019

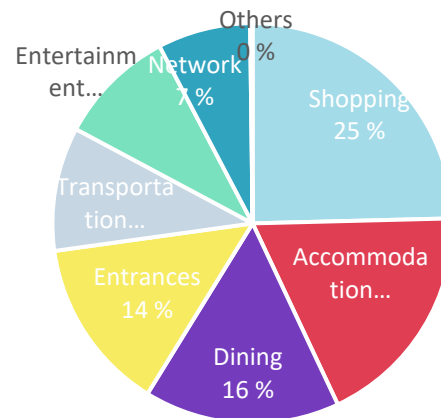
Sweden has had the strongest growth in summer 2019



Travel Spendings

China remains the world's largest spender and source market since 2012 but outbound spending per capita still low due to huge population.

37 % of the world's international tourism expenditure comes from Asia and the Pacific, up from 24 % in 2010.



Travel Spendings

Chinese travellers top the list among top 5 tax refund markets in the Nordic

Top 5 tax refund markets (Jan-Aug)

Sverige

Nationalitet	Andel	Utv.	Snittköp
Kina	50%	+42%	€ 556
Thailand	8%	+147%	€ 667
USA	7%	+6%	€ 279
Ryssland	4%	-42%	€ 174
Schweiz	3%	+18%	€ 268
Total	100%	+24%	€ 323

Danmark

Nationalitet	Andel	Utv.	Snittköp
Kina	49%	+18%	€ 689
USA	8%	+11%	€ 390
Hong Kong	6%	+18%	€ 1144
Thailand	4%	-8%	€ 711
Färöarna	3%	+6%	€ 158
Total	100%	+10%	€ 445

Norge

Nationalitet	Andel	Utv.	Snittköp
Kina	24%	+33%	€ 363
USA	12%	+13%	€ 155
Tyskland	9%	+18%	€ 128
Thailand	4%	+49%	€ 332
Frankrike	4%	+7%	€ 113
Total	100%	+14%	€ 172

Finland

Nationalitet	Andel	Utv.	Snittköp
Kina	42%	+28%	€ 682
Ryssland	41%	-11%	€ 118
Japan	5%	+13%	€ 155
Thailand	2%	+27%	€ 383
USA	1%	+15%	€ 383
Total	100%	+7%	€ 207

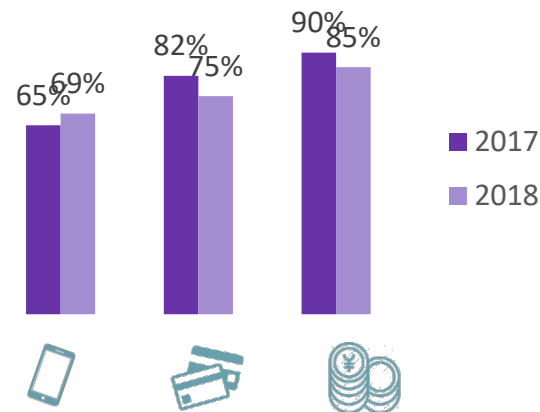


Digital Payments

69%

Outbound travellers used mobile payments in 2018

Payment methods



Travel Factors



Economy & Income

Population
1,39 billion

In marketing area
60 million

National (H1 2019)
GDP 6,3% CPI 5,2% ↑

PEK, SHA, CAN (H1
2019)
Income 8,75% ↑



81%

Consumers have
better financial
status than 5 yrs ago

54%

Consumers have
spent more in
travelling in 2018

Direct Flights to Scandinavia

SAS

PEK-CPH, daily

PVG-CPH, daily

HKG-CPH, 5 flights/week

Air China

PEK-ARN, daily, Jun-Oct

PEK-ARN, 5 flights/week, Nov-May

PEK-CPH, 3 flights/week, Nov-Mar

PEK-CPH, 4 flights/week, Apr-Oct

China Eastern

PVG-ARN, 4 flights/week

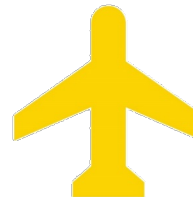
Hainan Airline

PEK-OSL, 3 flights/week

until end of Oct

Sichuan Airlines

CTU-CPH, 2 flights/week



In-direct Flights to Scandinavia

Finnair

PEK/PVG/HKG/CAN-HEL, daily
CKG/NKG-HEL, 3/4 flights/week
XIY-HEL, 3/4 flights/week (6 months)

Qatar Airways

PEK/PVG/CAN - DOH, daily
CTU/CKG, 3 flights/week
HGH-DOH, 4 flights/week
HKG-DOH, 14 flights/week

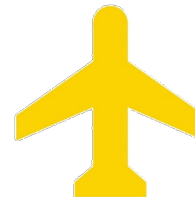
DOH-GOT, 5 flights/week

Tibet Airlines

TNA-HEL, 1-2 flights/week

Juneyao Airline

PVG-HEL, daily in 2019



Visa Service Centers

12

Denmark



12

Sweden



11

Norway



15

Finland



Travel Trends



Travel Trends – ways of travelling

- **Consumption upgrade** 消费升级
- **New Group Travel** 新跟团游
 - Private group tour 私家团
 - Local group tour 目的地参团
 - Semi-package tour 半自助
 - Luxury group tour 五钻豪华团
 - Thematic group tour 主题跟团游

+120%

Tourists who joined
private groups to
Europe in H1 2019
Average 3.2 people

+315%

Tourists who booked
tailor-made trips to
Europe in H1 2019

Travel Trends – Diversified themes

Top 10 themes of tailor-made trips to Europe



Travel &
Photograph



Culture & History



Nature



Art & Fashion



Family



Hiking



Summer camp



Northern Light








Cruise



Ski & Spa

Travel Trends – Diversified Themes



-  Road trip bookings increased by 32%
-  Top 5 markets: Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Hangzhou
-  41% clients aged under 45 years old
-  Most popular road-trip destinations: New Zealand, Australia, Germany, Canada & US
-  Emerging niche destinations: Turkey, **Norway**, Georgia (average growth 35%)

Travel Trends - Persona

Popular destinations among
post 95s generation

- Africa
- **Iceland**
- Russia
- **Denmark**
- Saudi Arabia
- **Finland**
- **Sweden**
- **Norway**
- Turkey
- Morocco

Planning and booking



Sources of Information

Top 5 sources of information prior to a trip

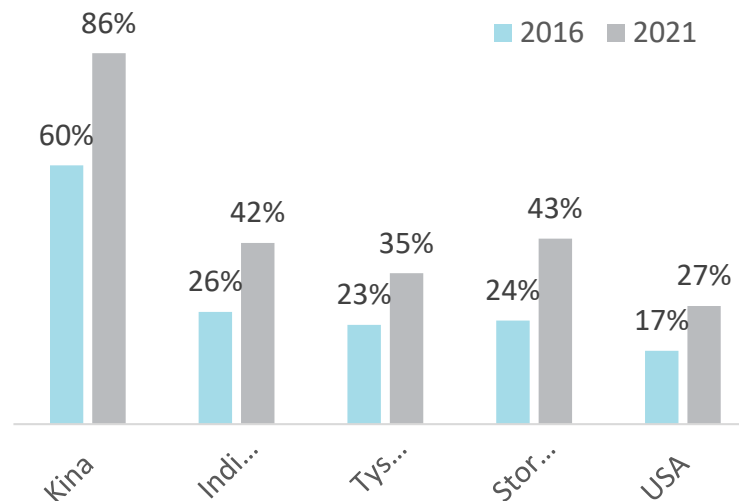
1. Travel portal website, e.g. Ctrip, Qunar
2. Social media, e.g. Weibo, Wechat
3. Web page from tour operator or travel agency
4. Other travellers' opinions via travel blogs or rating sites, e.g. Tripadvisor, Mafengwo
5. Tourism organisation website

Mobile Gross Bookings Share* (%) 2016 vs. 2021

The extraordinarily high level of mobile booking penetration in the Chinese travel market is primarily due to the prevalence of WeChat.

WeChat has become the go to tool that most people in China use for many daily tasks.

Over 80% of Chinese outbound travellers have WeChat accounts.

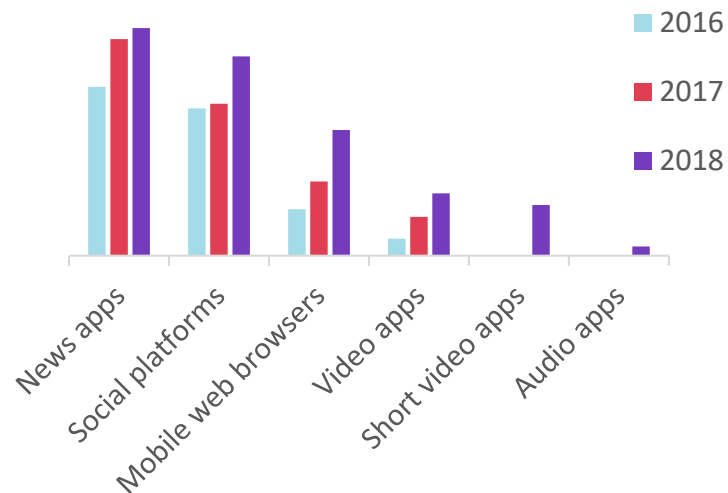


Chinese Social Media Landscape

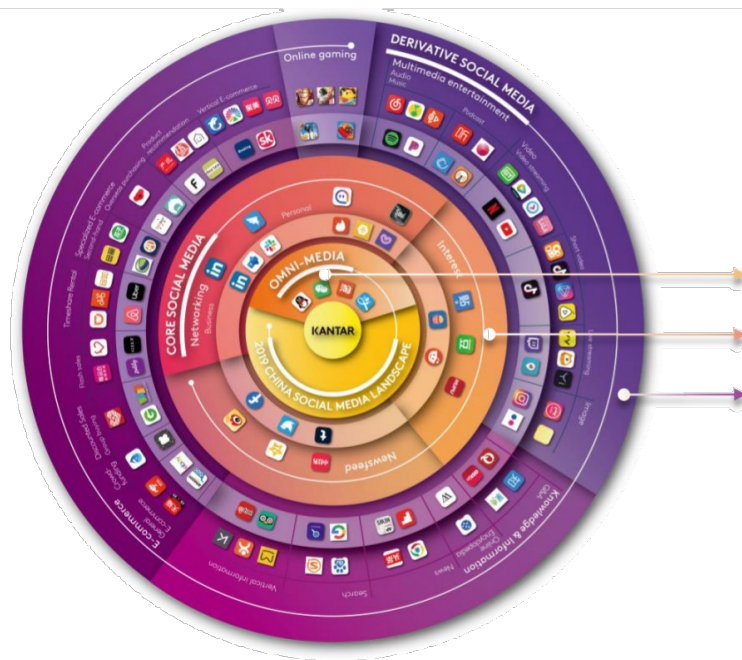


Chinese Social Media Landscape

Major information sources



Chinese Social Media Landscape



Omni-media

WeChat, QQ, Alipay, Taobao

Core Social Media

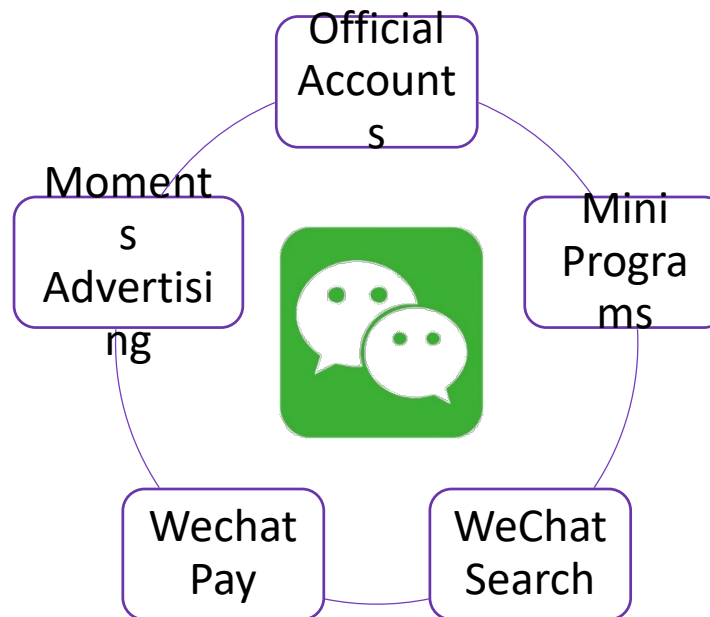
Weibo, Little Red Book, Douban

Derivative Social Media

Tiktok, Zhihu, Dianping, Youku

Chinese Social Media Landscape

WeChat Ecosystem



Chinese Social Media Landscape

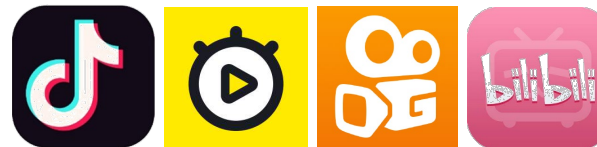
Short Videos

Until 2018, short video app users reached to 500M in China. (107%)

TikTok, Miaopai, Kwai, Bilibili, etc

PGC, UGC

Vlog





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