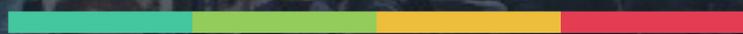


Resident Sentiment Index

Are Copenhagen residents tourism-supportive?

2018



RESIDENTS

Sentiment Index



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Introducing the Resident Sentiment Index



RESIDENTS
Sentiment Index

A Global Standard

For measuring residents' sentiment towards tourism

TOP Influencers of visitor experience



Because residents' attitude is the first driver of your visitor experience

Source: TCI / TRAVELSAT Competitive Index
Correlation to the overall satisfaction

Tourism growth only goes hand in hand with local population acceptance.
We provide the data to monitor residents' sentiment
... before it becomes a problem!

Ensure your residents will play
for and not *against* your tourism planning



A global standard for all cities

For monitoring residents' perceptions towards tourism



30+ Essential Indexes

Tourism positive and negative impact on resident mood



Customization

Because each city addresses specific tourism situations



Unique Benchmarking

Based on norms for cities with similar features



A flexible methodology

Full service or embedded in exiting resident surveys

How is Resident Sentiment Data collected?



A flexible screening process maximizes sample representativeness



Sample representativeness

- Quotas and data weighting schemes defined per district, gender and age using reference population statistics
- Inclusion of areas having all levels of tourism pressure on residents
- Controls on qualification criteria that can influence opinions: tourism-related occupation, visitor hosting activities...



Recruitment of respondents

- From geo-localized access panels
- Ensures a good dispersion of respondents across districts



Standard online questionnaire + ad hoc questions

- Online self-completed responsive questionnaire (~ 6-8 minutes to complete)
- Includes questions about residents' perceptions of the tourism impact and questions to profile residents for segmentation purposes
- Ensures consistency and data comparability across cities for benchmarking



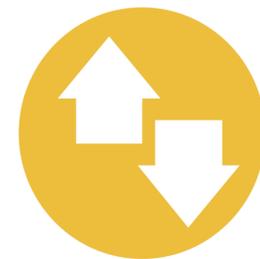
Data has been weighted to reflect city statistics for citizens' age, gender and geographical location (districts)

Benchmarking Scope

Providing comparative analysis for all standard indexes

Benchmarking that reveals *your* specific issues to address

- **Comparison of key resident sentiment scores** compared to the RSI benchmarking norms
- RSI Benchmarking norms are calculated from **3300+ resident interviews (online questionnaires)** across **13 cities in Europe**: *Berlin, Stockholm Brussels, Amsterdam, Copenhagen, Florence, Lisbon, London, Lyon, Prague, Rome, Barcelona, Paris.*



Benchmarking metrics for mapping where you stand

- **Average** scores reflecting European resident opinion "norms"
- **Highest score** (Max value from the set)
- **Lowest score** (Mix value from the set)

Note: Individual scores of cities are not provided.

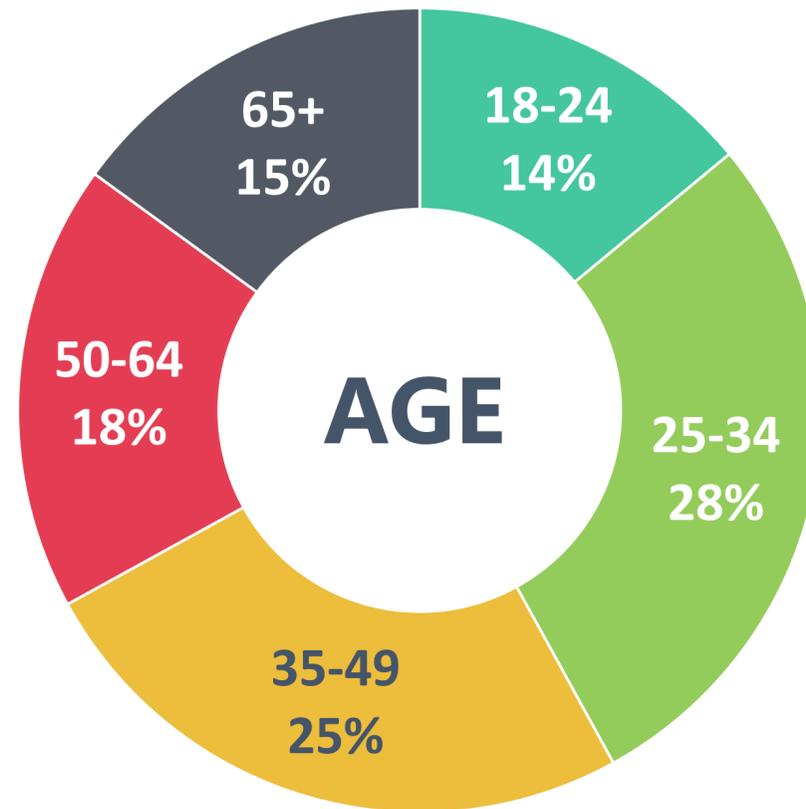
Sample specifications

Results are weighted according to the population age and district distribution in Copenhagen (see map)

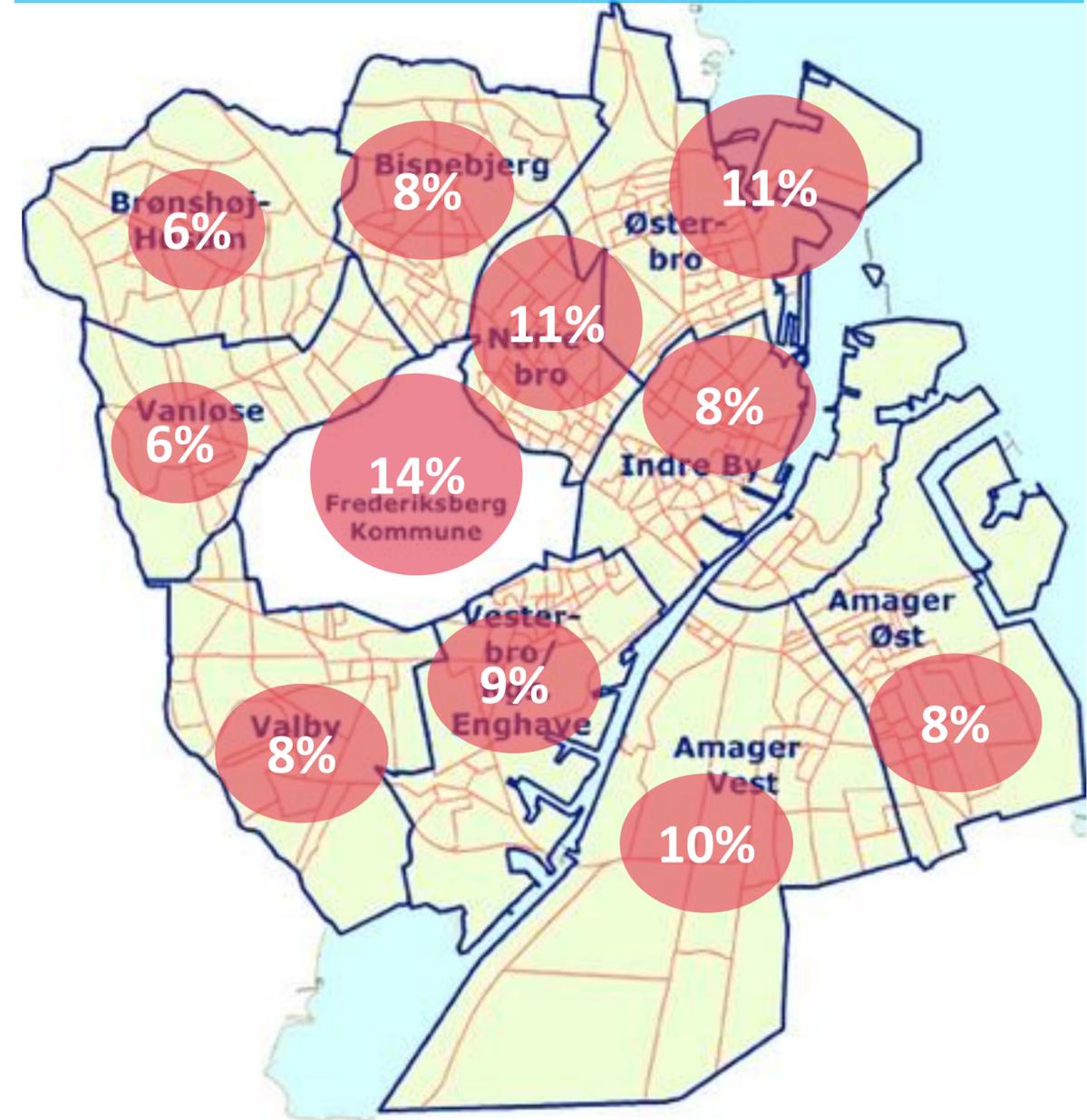


1076 respondents

- Interviewed online
- Screened from access panel
- Time frame: mid-December 2017



Population distribution



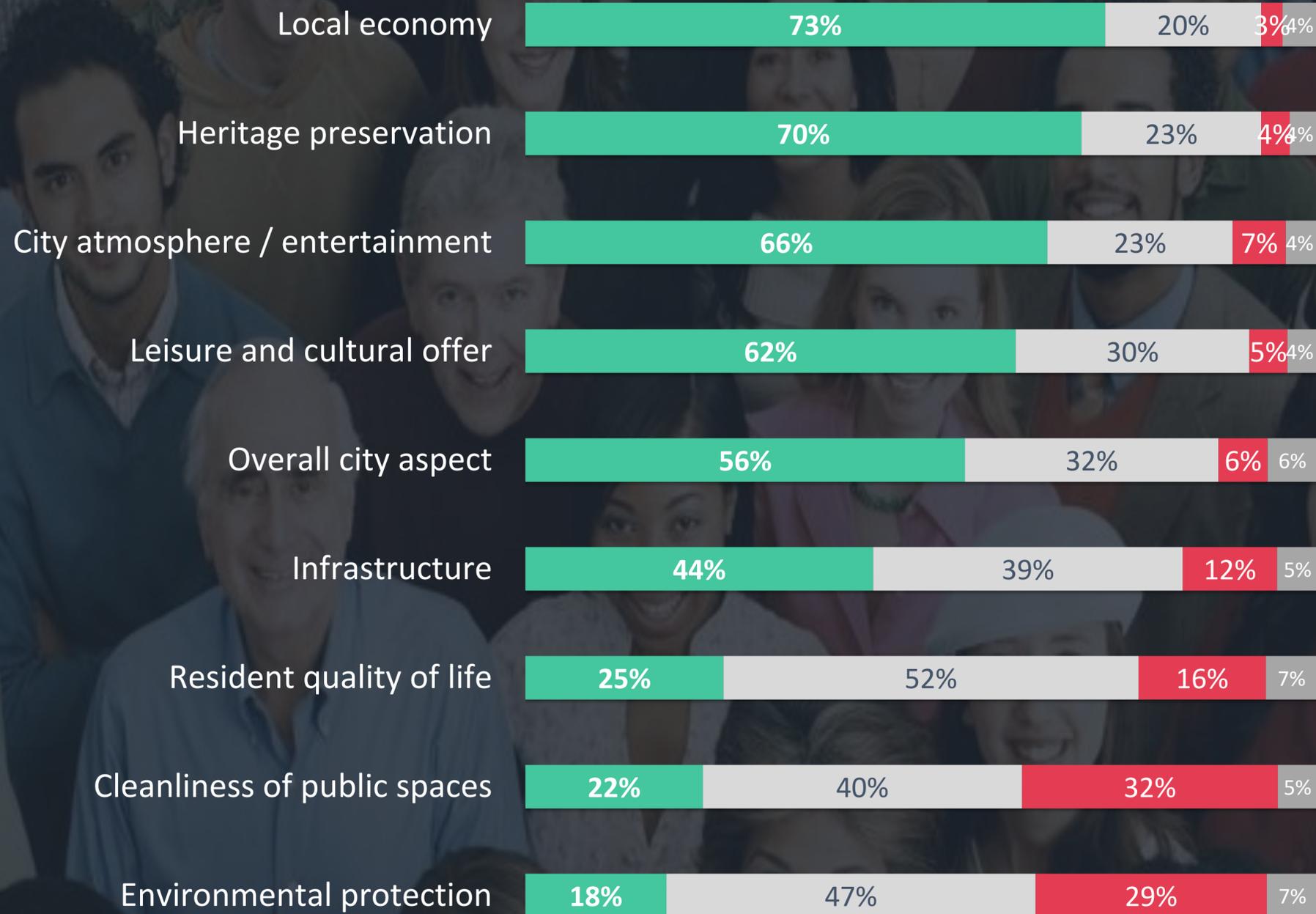
Tourism Impact Perception



RESIDENTS
Sentiment Index

TOURISM IMPACT PERCEPTIONS

RESIDENTS Sentiment Index



n = 1076

A focus on the environmental impact of tourism is required

Copenhagen residents **recognize a positive tourism impact** on economy, city atmosphere and activities, while the impact of tourism on their quality of life remains acceptable.

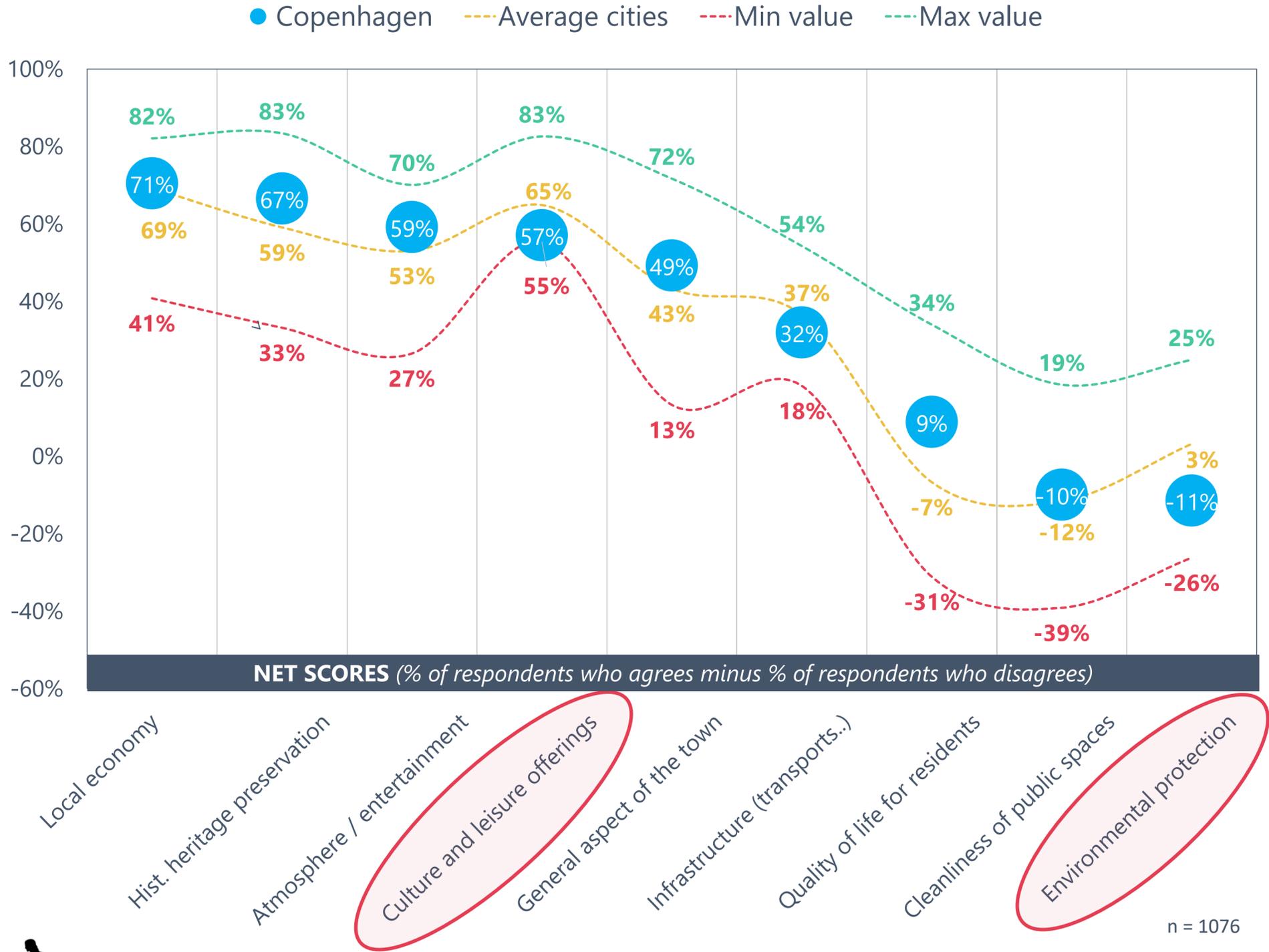
However, a **concern is expressed about the environmental impact that tourism generates**, in terms of both natural protection and cleanliness.

Definitions

Overall city aspect	<i>The general aspect of the town</i>
Heritage preservation	<i>The preservation and showcasing of the historical heritage</i>
Local economy	<i>The local economy</i>
Resident quality of life	<i>The quality of life for residents</i>
Environmental protection	<i>Protection of the environment and natural sites</i>
Cleanliness of public spaces	<i>The cleanliness of public spaces</i>
Leisure and cultural offer	<i>The cultural activities and leisures on offer</i>
City atmosphere / entertainment	<i>The atmosphere and entertainment in the town</i>
Infrastructure	<i>The infrastructure (transport, sporting equipment, cultural features...)</i>

Tourism Impact Perception - Benchmarking

How does Copenhagen perform compared to the average?



The general sentiment impact is in line with or above norms

Most aspects impacted by tourism are rated in line or above the average city norms. The **environmental protection issue** is a **special concern** compared to the average of other cities. Tourism's impact on **culture and leisure offerings** as well as on **infrastructure** is also a **point of concern** since Copenhagen is **rated below the city norm** within these categories.

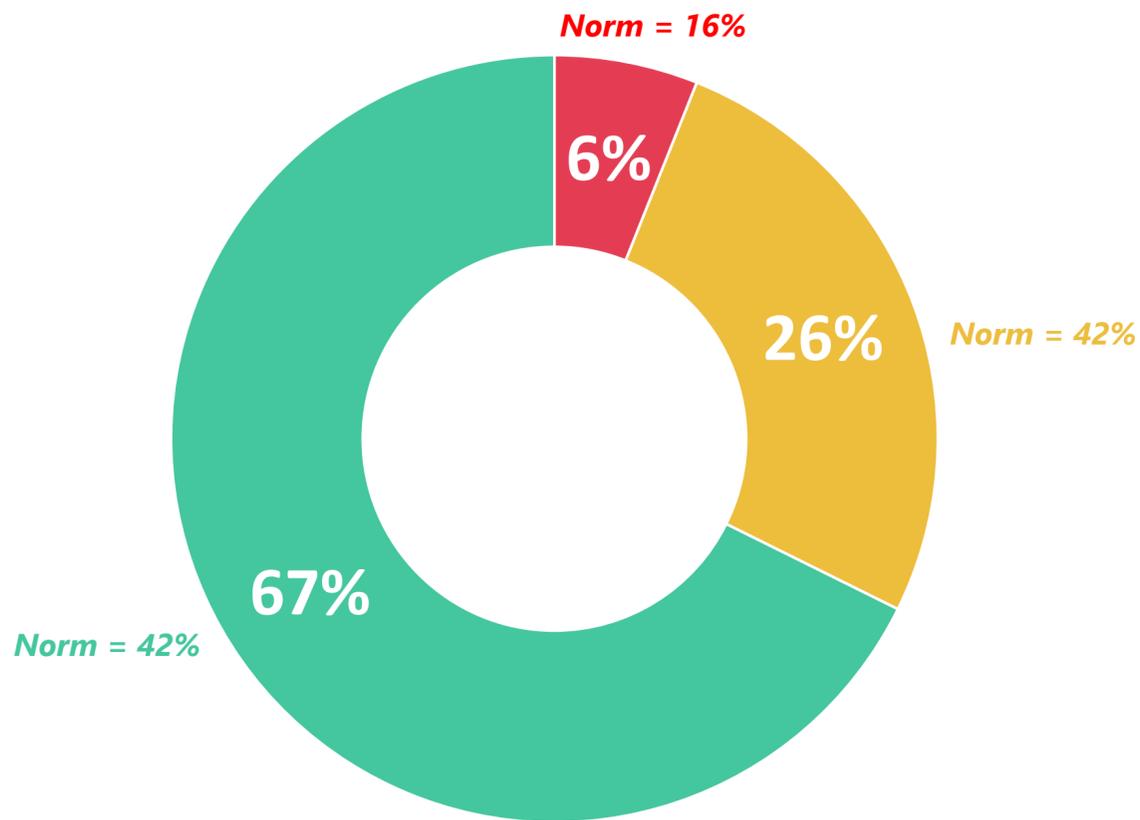
Definitions

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Qualifying the problems caused by tourism

Seasonality and types of nuisances

Seasonality perceptions

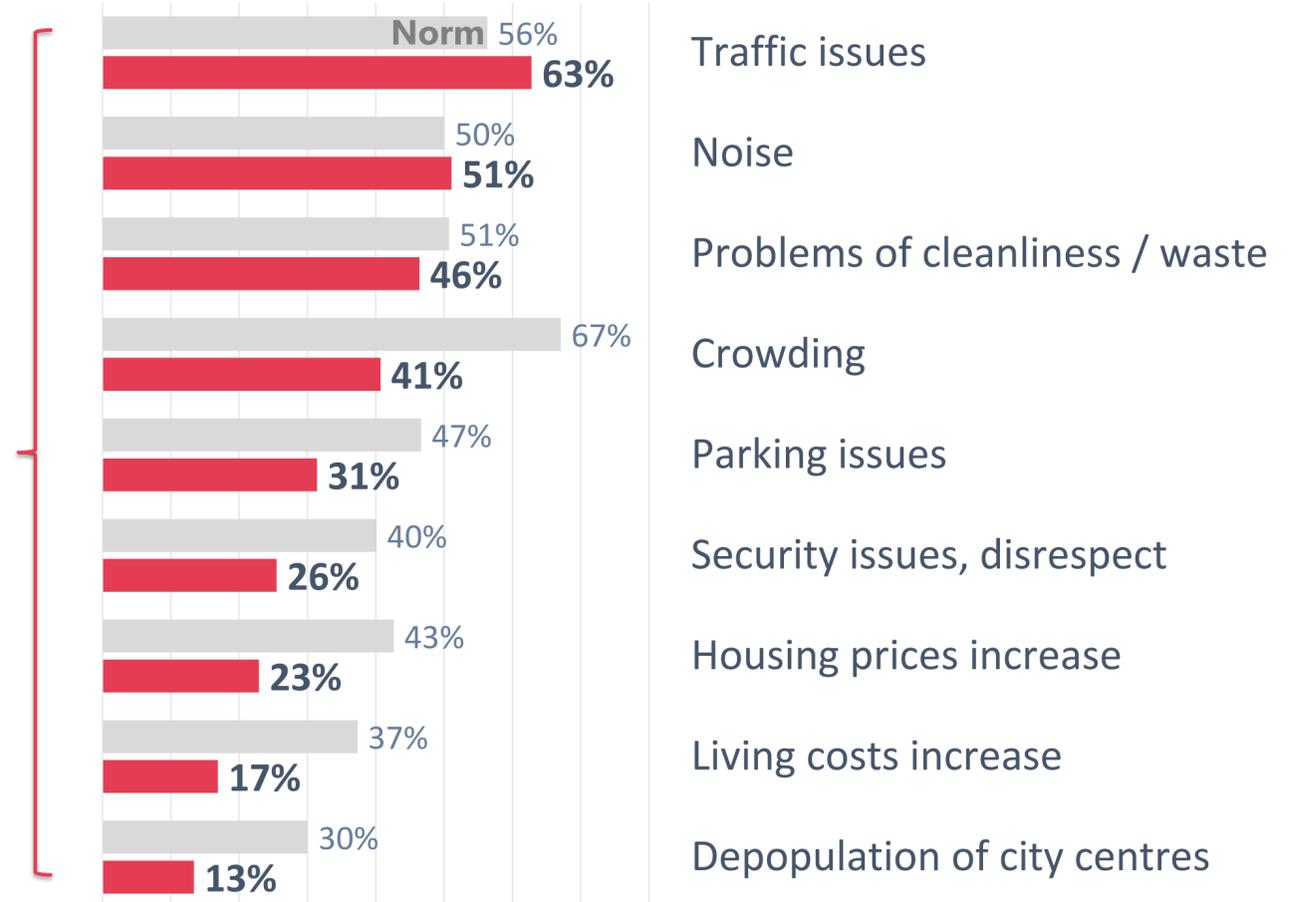


- Problems throughout the whole / most of the year
- Problems at certain times of the year
- No problems



Nuisances

What type(s) of problems does tourism cause in your city?



Answers among residents stating that they experience problems due to tourism throughout the whole/most of the year or certain times of the year (N=351)

- Copenhagen
- Average city norm

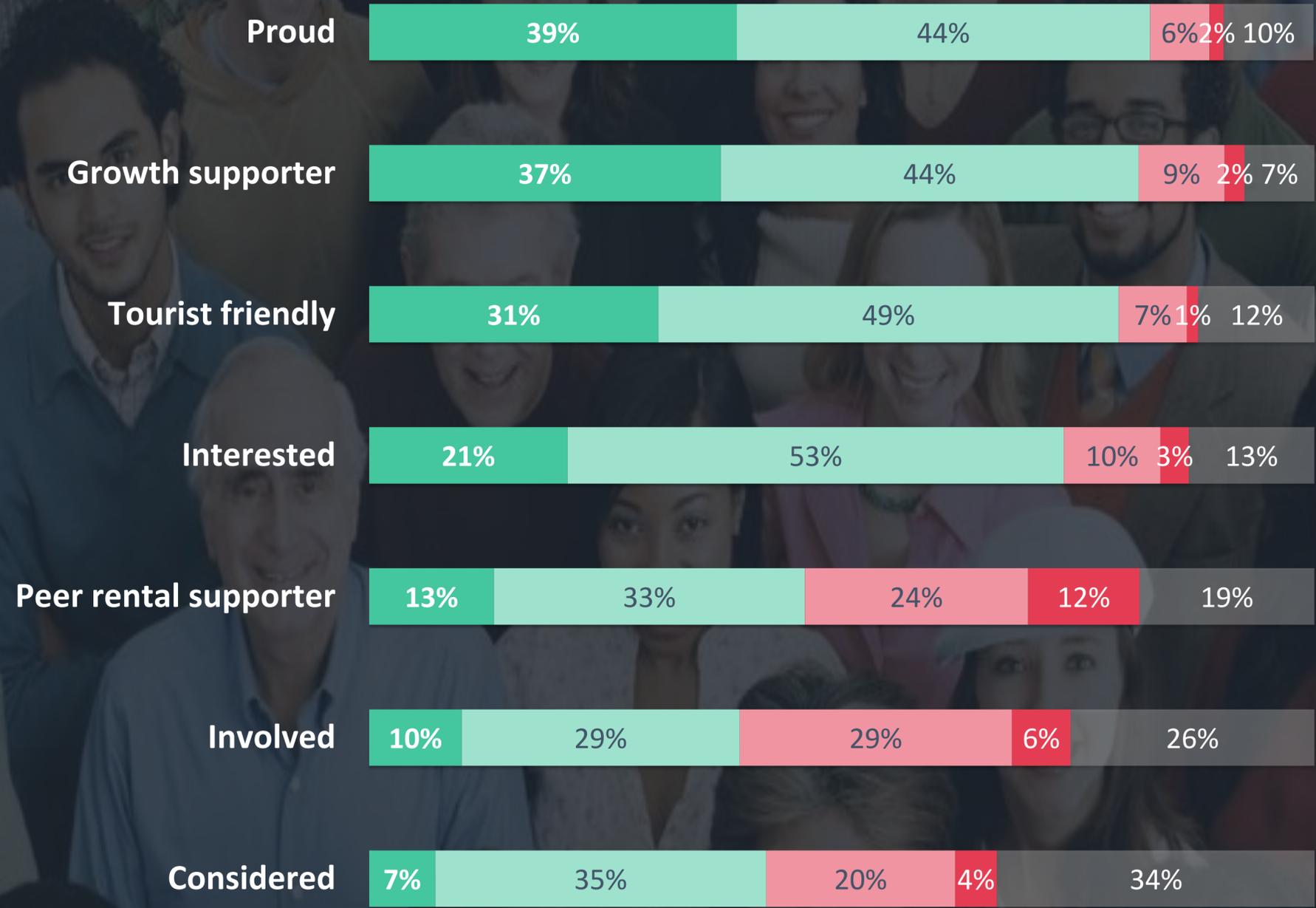
Resident Mood



RESIDENTS
Sentiment Index

RESIDENTS' MOOD ABOUT TOURISM

RESIDENTS
Sentiment Index



n = 1076

A positive resident mood can be converted into engagement

81% is very **supportive** or fairly supportive **towards tourism growth**, which is very **positive**.
The majority of resident in Copenhagen **are proud to see tourists in their city** and are **happy to welcome** them.

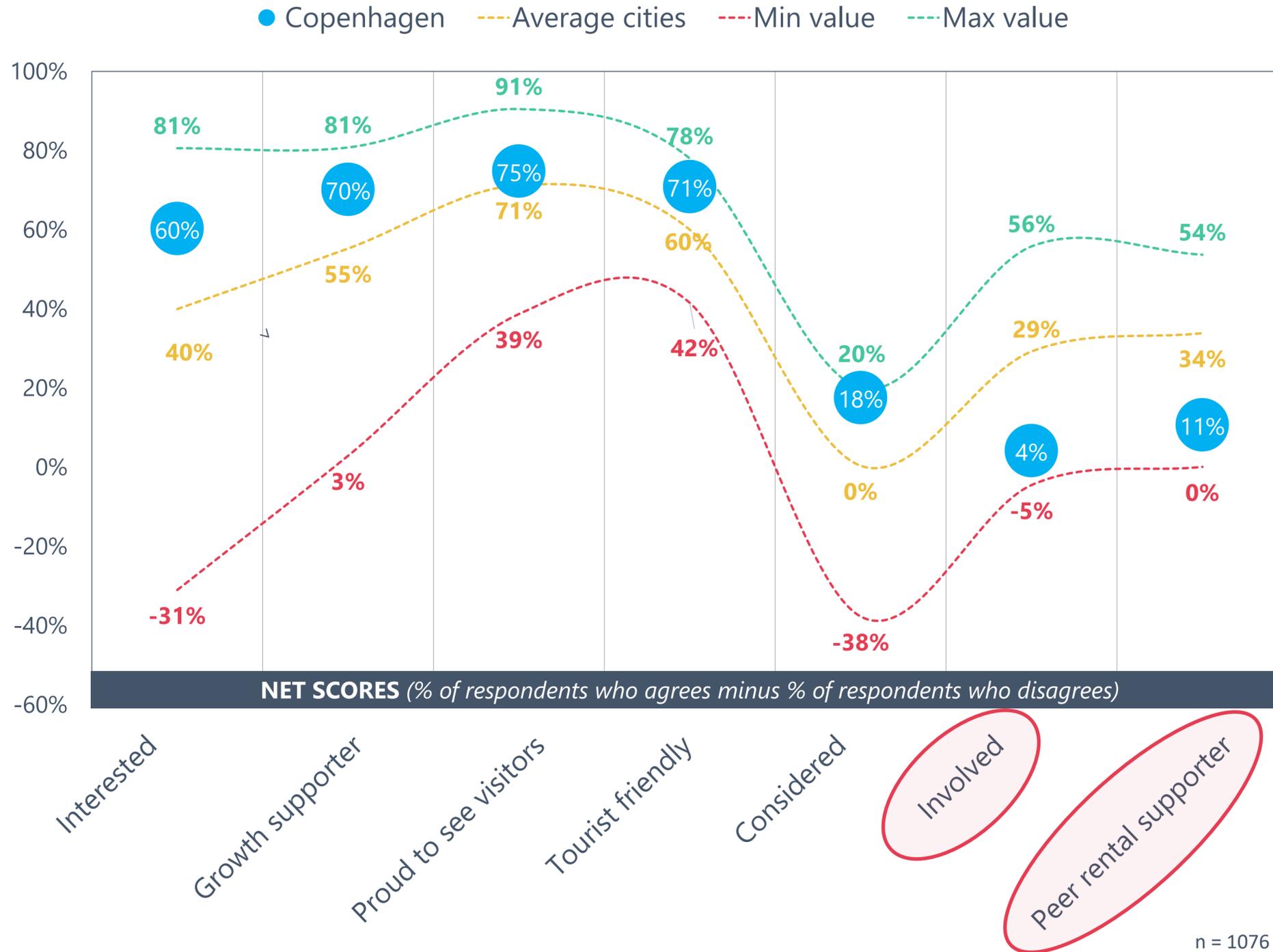
However, a third of the residents in Copenhagen expresses **concerns for the development of peer rental e.g. Airbnb**.

Definitions

Considered	<i>My town's tourism policy takes into account the impact on the life of locals</i>
Involved	<i>I would like to be more involved in decisions concerning tourism in my town</i>
Peer rental supporter	<i>The development of private accommodation offerings (such as Airbnb, HomeAway, etc.) is good for my town</i>
Interested	<i>I think the tourism development in my city is interesting</i>
Tourist friendly	<i>I like to give tourists advice and tips</i>
Growth supporter	<i>My town should continue to promote itself to attract more tourists</i>
Proud	<i>I am proud to see tourists who have come from far away to visit my town</i>

Resident Mood - Benchmarking

How is the mood of Copenhagen residents compared to the average of other cities?



A positive and supportive mindset, compared to other cities

Copenhagen residents feel more tourism-friendly and involved in the tourism development compared to the city norms, but locals in Copenhagen are **more critical towards peer rental compared to the average norm.**

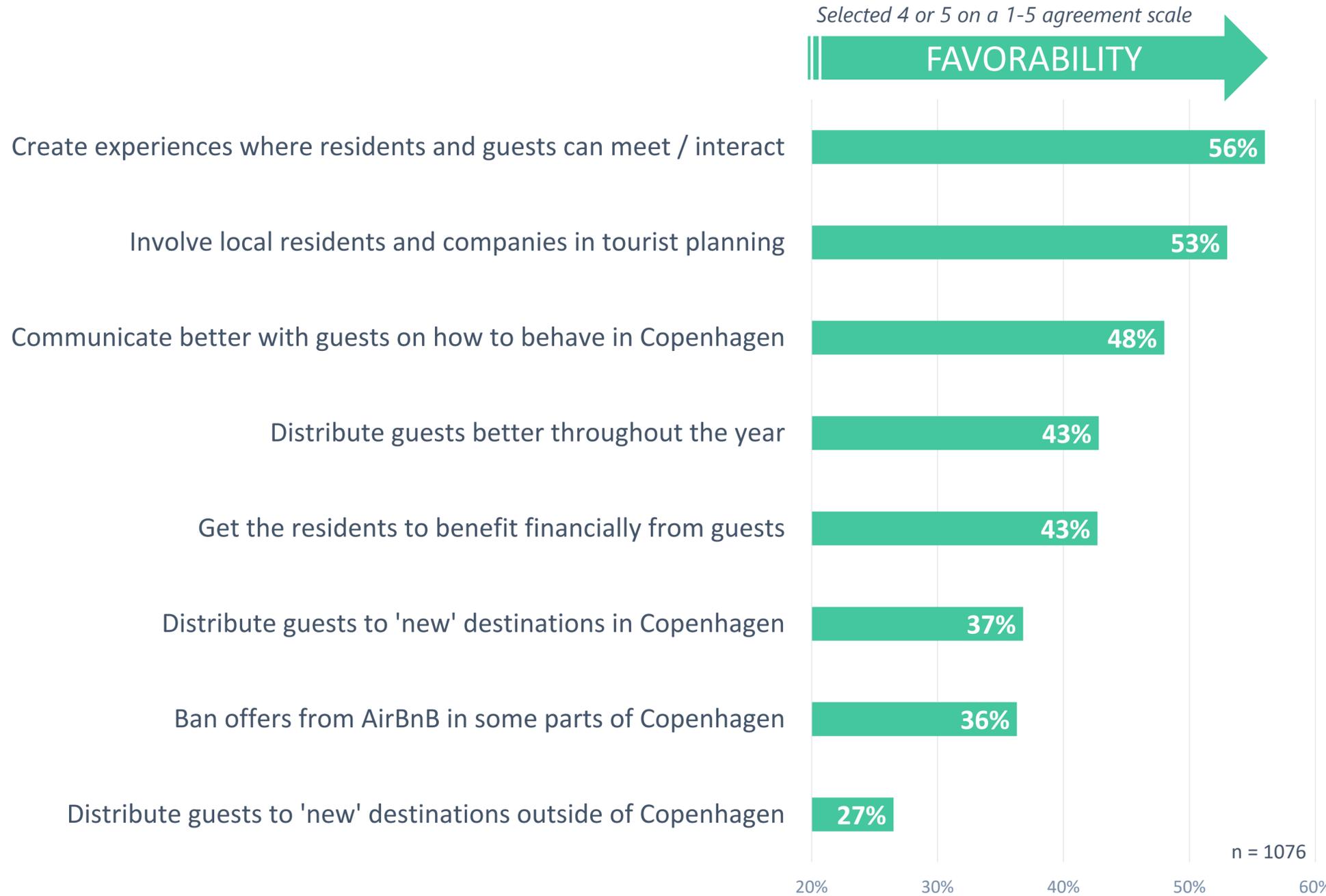
The overall positive mood of the locals could be **converted into more willingness to participate** in the tourism development of the city – an area where Copenhagen is rated below the norm as well.

Definitions

Considered	My town's tourism policy takes into account the impact on the life of locals
Involved	I would like to be more involved in decisions concerning tourism in my town
Peer rental supporter	The development of private accommodation offerings (such as Airbnb, HomeAway, etc.) is good for my town
Interested	I think the tourism development in my city is interesting
Tourist friendly	I like to give tourists advice and tips
Growth supporter	My town needs to continue to promote itself to attract more tourists
Proud	I am proud to see tourists who have come from far away to visit my town

Priorities seen in tourism planning

What kind of initiatives do residents in Copenhagen prefer?



More and better Interactions between locals and tourist

A great number of the residents would **welcome initiatives to increase financial benefits** from tourism, but their **first driver is not money but interactions.**

Residents would welcome initiatives allowing them to **interact more with visitors** and great number of the resident would like locals and companies to be **more involved in the planning of tourism.**

Better communication about how tourist should behave is also a **priority.**

Resident Mood – Open-end suggestions

What is on the agenda for residents in the development of tourism?



n = 607

Open end question - % of mentions that include the dimension

Education, information and dialogue between all stakeholders

According to locals, **education on how to use bicycles** and **environmental considerations** are the top priorities in the development of tourism.

A **better dialog between residents and policy makers** is also a priority as well as **better public transportation** and tourist **guidance in general**.

The need for **Airbnb restrictions or even a ban of Airbnb** is mentioned as well, due to the associated risk of rising housing costs and the impact on local life when guests and locals live side by side.

Resident Mood – They said it!

What should be put into place to improve the development of tourism according to locals?

Selection of resident testimonials

Tourists should get information about Copenhagen, the Danish mentality and norms, about the Danish culture, public transportation and hygiene through brochures and on the internet (codes of conduct). In addition they should be guided by locals (who know certain areas) on the street to different places

There should be a central bus station or a new remote bus terminal with a more simple ticket system (travel price is missing) and zone system perhaps fewer zones, 1 zone from the airport to Harestrup, Vanlose and around Kbh and a terminal for the opera and cruise. Minor road work in the high season, wider cycle paths, no traffic jam behind DGI city and better conditions of the ships and coaches at busstation Vestobo

A better waste management is essential and more public restrooms for tourists and more garbage containers especially with major (street) events. There is a lot of pollution from cruise ships, at park side walks and public transportation stops. Environmentally friendly busses with no noise or pollution would be a good consideration. In addition more green areas and responsible cleaners per area

There should be new activities in Tivoli and in the outskirts of Copenhagen around youth areas rather than family areas such as sustainable events, international events in winter/spring, several nightclubs, tours & excursions and more cultural offers in museums. Theatres & Opera's should be open all year long and during Christmas, the city lacks personality (not different than any other European city)."

We cannot help to imagine tourists that Copenhagen is a safe city when there are frequent fraud, street robbery and band shedding, and the police at the same time are so understaffed that rarely is help getting. Both local and tourists need proper information and protection against crime

Danish people should be able to speak English. Messages, signs and tourist attractions should also be announced in English or several languages. Especially on places like Papirøen, Nyhavn and Inderhavsbroen there should be language signs for tourists on bicycles on the road or maps at stops

There should be cheaper hotels and several Bed & Breakfast. Hotels should be build in the outskirts of Copenhagen with better and greater deals on accommodation and activities. Also should there be better facilities for disabled travellers



Noisy activities which are at places where residents live should be limited just like outdoor music festivals. The tourists need to go home when the music stops and the police should make sure that they really leave the place

Make a concept of Dinner with Danes or a meet the locals campaign, where tourists can eat and talk with locals in their homes or in a café. Which eventually can turn out into an annual event/festival/conference where locals, tourists and immigrants can participate and get to know each other through discussing global matters.

There should be more parking places for residents and tourists such as an underground parking and a Park & Ride place so that tourists can park their car and use the public transportation

City council meetings for residents so that they will be heard, will be included and can take part or being involved on what measures the council and regional authorities intend to take on the city tourism policy. So that residents can share their experiences and ideas

Hotels, travel agencies and other tourist organisations must provide tourists a guide included pictures with the most common bicycle problems, rules and the danger of electric bicycles (or ban those). They should inform tourist about the traffic rules for bicycles, rental for bicycles how to cycle a bike or even provide them a course on riding a bicycle!

Mainly around Christmas and the summer months the inner city is a chaos. Other places should be more promoted than Stroget, Nyhavn and Tivoli f.e. Amager Strandpark and Dragør or places outside the city centre

Cheaper public transport for the outskirts of Copenhagen & Denmark and an offer of better and different prices for public transportation. To facilitate that tourists can also visit other places

Airbnb and any other form of short rental should be forbidden and there should be cheaper accommodations offered for tourists instead. These rented accommodations should be for permanent residents and students

Tourism Ambassadors and Detractors



RESIDENTS
Sentiment Index

Segments *over-represented* among tourism ambassadors and detractors

Ambassadors are over-represented among...

	Overall net sentiment	Growth supporter	Tourismophobia
<i>Average residents</i>	52%	70%	4%
Employed people (n = 771)	60%	73%	-
People living in fairly touristy places (n = 355)	61%	-	1%
People who have an occupation linked with tourism (n = 150)	64%	-	-
People living in the city for 7-15 years (n = 211)	69%	81%	1%
Occasional hosts (n = 224)	57%	77%	2%

Detractors are over-represented among...

	Overall net sentiment	Growth supporter	Tourismophobia
<i>Average residents</i>	52%	70%	4%
Young aged 18-30 years old (n = 151)	21%	50%	10%
Unemployed people (n = 351)	30%	58%	9%
Residents in Indre By (n = 85)	43%	41%	12%
People living in the city for less than 3 years (n = 151)	25%	65%	7%
People living in busy touristy places (n = 309)	-	-	7%



*Estimates based on limited sample basis
No percentage = no significant difference vs average residents*



Key Resident Sentiment Index



RESIDENTS
Sentiment Index

Overall Risk Assessment

Key Sentiment – All European cities

OVERALL TOURISM SENTIMENT INDEX

The overall tourism sentiment index is the difference in percentage of local respondents who feel that tourism generates more positive consequences than negative consequences and the percentage of respondents who feel the opposite is the case.

60% of the respondents in Copenhagen felt that tourism in Copenhagen generates more positive consequences than negative consequences, while 8% thought the opposite was the case. This equals a tourism sentiment index of 52%, which is 5% higher than the average of the cities included in this analysis.

The sentiment index is calculated to take into account both positive and negative sentiments, and at the same time exclude results from neutral respondents and respondents who were unable to answer the question.

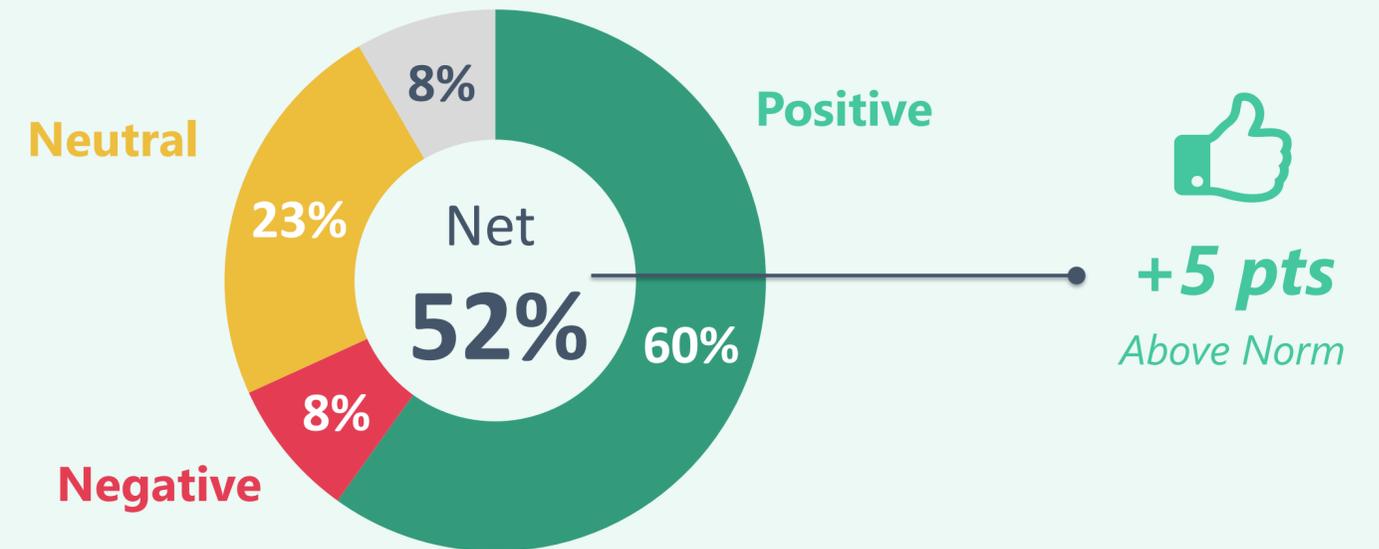
TOURISM GROWTH SUPPORT INDEX

The tourism growth support index is the difference between the percentage of local respondents who think a city should continue to promote itself to attract more tourists and respondents who fell the city should stop being promoted to tourists.

Copenhagen received a tourism growth support index of 70% because 81% of the respondents thought that the city should continue to promote itself towards tourists, while 11% thought that it should stop all promotion. This equals a difference between the two groups of 70%. Copenhagen's score is 15% higher than average of the cities included in this analysis, which means that the average of a city in this analysis had a tourism growth support index of 55%.

The tourism growth support index is calculated because it, like the tourism sentiment index, allows for both positive and negative sentiments and excludes the respondents who were unable to answer the question.

OVERALL TOURISM SENTIMENT INDEX



TOURISM GROWTH SUPPORT INDEX



Overall Risk Assessment

Key Sentiment – All European cities

TOURISMOPHOBIA INDEX

The tourismophobia index is a combination of local respondents who think tourism creates more negative than positive consequences for their city and respondents who do not want their city to be promoted in order to attract more tourists.

4% of the respondents in this survey felt that tourism creates more negative than positive consequences for the city of Copenhagen and that Copenhagen should no longer be promoted in order to attract more tourists. This is 2% lower than the average city norm, which is 6%.

The tourismophobia index is calculated to gain an overview of the percentage of respondents who belong to the group with the most negative outlook on tourism in their city. That is, the group of respondents who wants less tourists to visit their city, because they think tourists are causing too many problems for the city. The larger this group of respondents is, the more resistance a city is going to face when working to continue the tourism development in the city.

TOURISMOPHOBIA INDEX



-2 pts
Above Norm



RESIDENT CONSIDERATION INDEX

The resident consideration index is the difference between the percentage of local respondents who think their city's tourism policy takes tourism's impact on the locals' lives into account versus the percentage who think their city's tourism policy does not account for tourism's impact on the lives of the locals.

42% of the respondents in Copenhagen thought that Copenhagen's current tourism policy takes tourism's impact on their lives into consideration, while 24% of the respondents thought that Copenhagen's current tourism policy does not take tourism's impact on their lives into account. This equals a difference of 18%, which is Copenhagen's resident consideration index score.

Copenhagen's resident consideration index score is 18% higher than the average city norm in this analysis.

The resident consideration index is, like the previous scores, calculated to allow for both positive and negative sentiments and excludes the respondents who were unable to answer the question.

RESIDENT CONSIDERATION INDEX



+18 pts
Above Norm

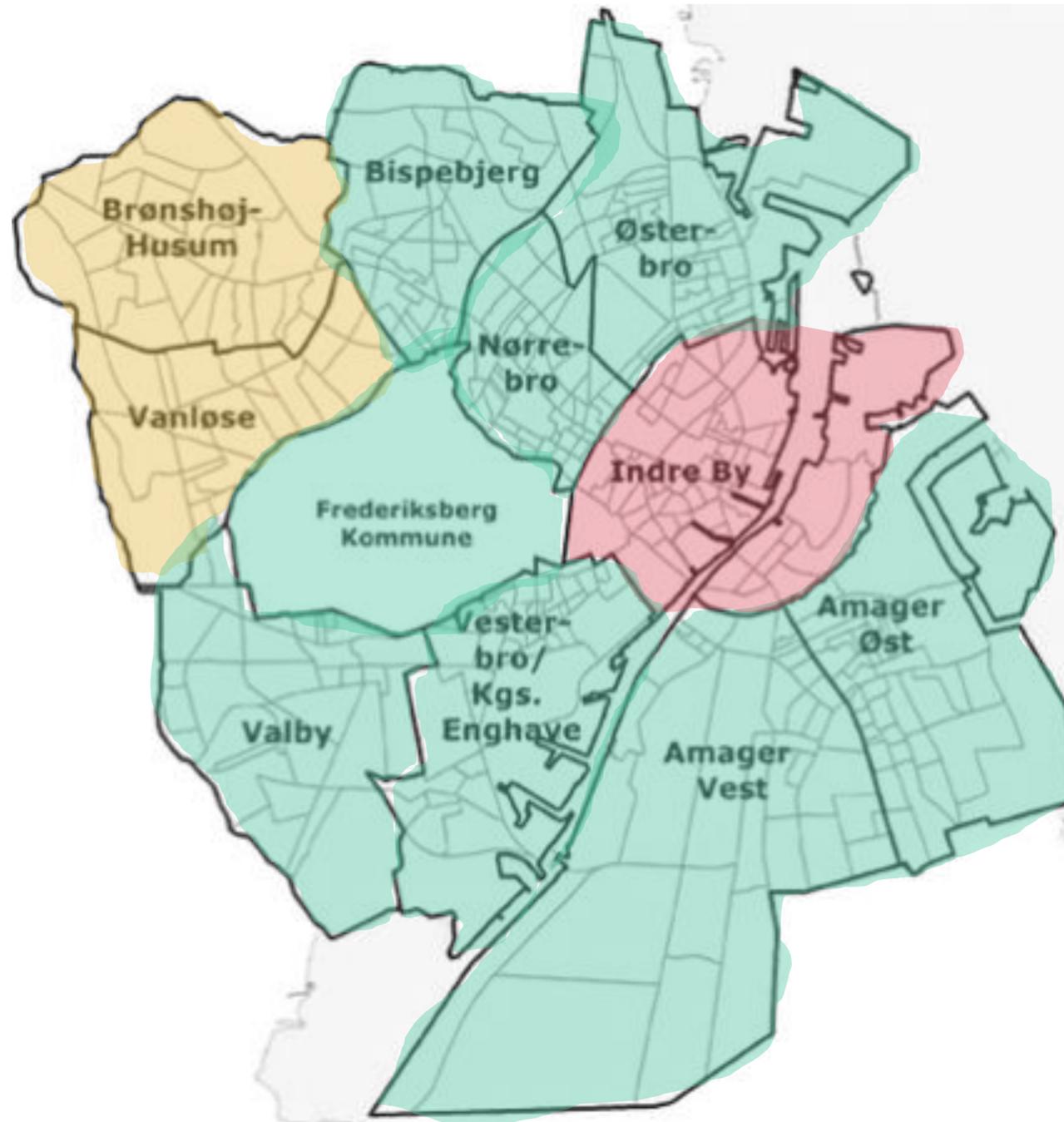
18%

-100 %

+100 %

Mapping tourism rejection risks

Tentative risk evaluation based on a combined gap analysis of the overall tourism impact sentiment, Tourismophobia and Tourism growth support levels.



Highest risks

Possible risks

Minimal risks

Indre By to be put on the watchlist

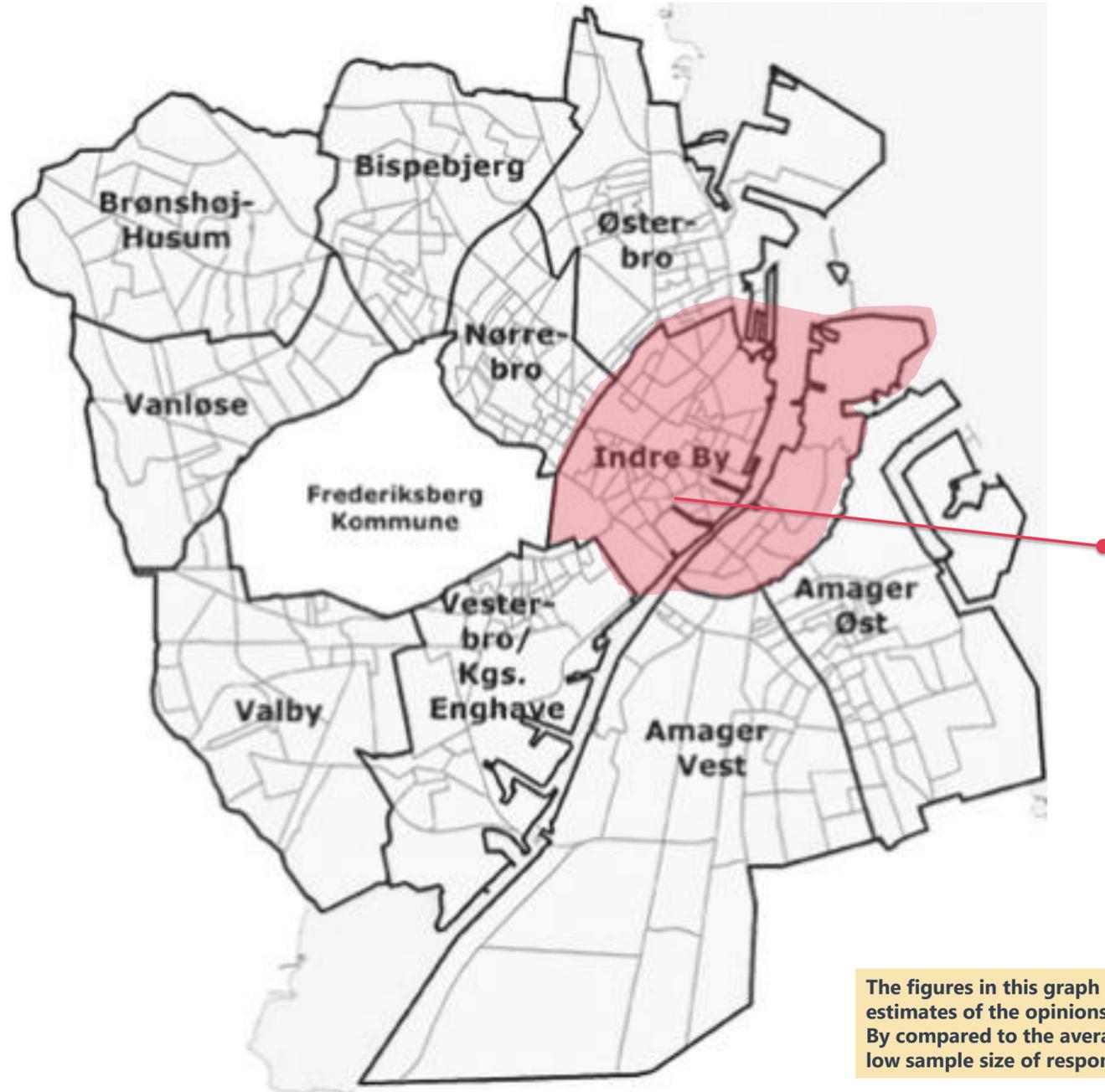
The level of **tourism acceptance** is **generally high** in most districts of Copenhagen. The only **district at risk** is **Indre By**, where residents are more **reluctant towards tourism growth**.

	Level of tourismophobia	Tourism growth support (net)	Overall sentiment (net)
Average	4%	69%	59%
Amager Øst (n = 130)	4%	69%	59%
Amager Vest (n = 85)	2%	76%	54%
Bispebjerg (n = 44)	1%	96%	64%
Brønshøj-Husum (n = 48)	7%	59%	44%
Frederiksberg (n = 153)	3%	78%	59%
Indre by (n = 85)	12%	41%	43%
Nørrebro (n = 127)	4%	78%	56%
Østerbro (n = 155)	5%	76%	51%
Valby (n = 85)	2%	75%	56%
Vanløse (n = 36)	4%	54%	46%
Vesterbro (n = 80)	2%	62%	58%

The figures in this table should be seen as estimates of the opinions of the respondents in each of the neighbourhoods, due to the low sample size of respondents from many of the neighbourhoods.

A focus on Indre By - a district "at risk"

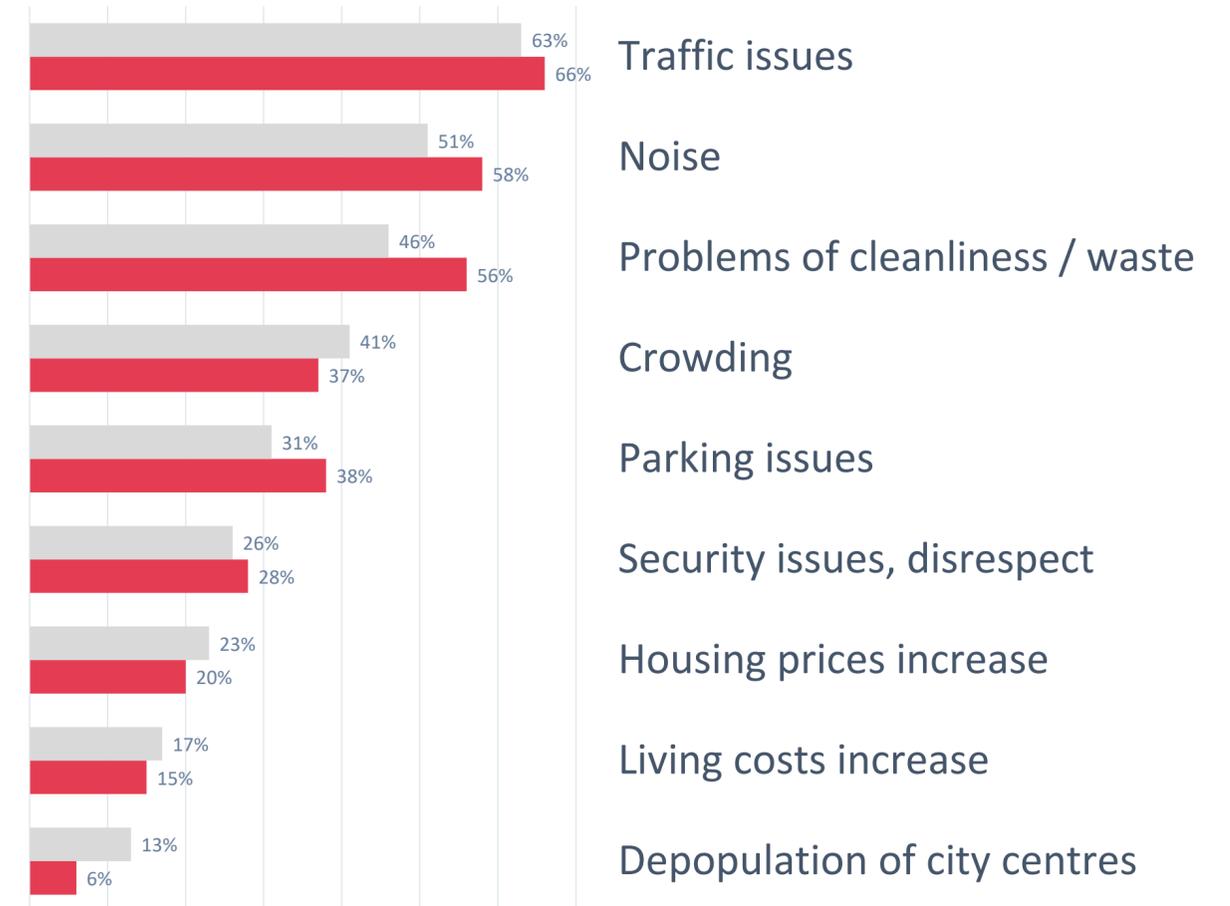
Ranking issues with regards to tourism



The figures in this graph should only be seen as estimates of the opinions of the respondents in Indre By compared to the average respondent, given the low sample size of respondents from Indre by.

Key problems reported

What type(s) of problems does tourism cause in your city?



Answers among residents stating that they experience problems due to tourism compared to the average district norm in Copenhagen and Frederiksberg.

■ Indre By (n=49)
■ Average district norm (n=351)

A focus on Brønshøj and Vanløse: Two districts possibly "at risk"

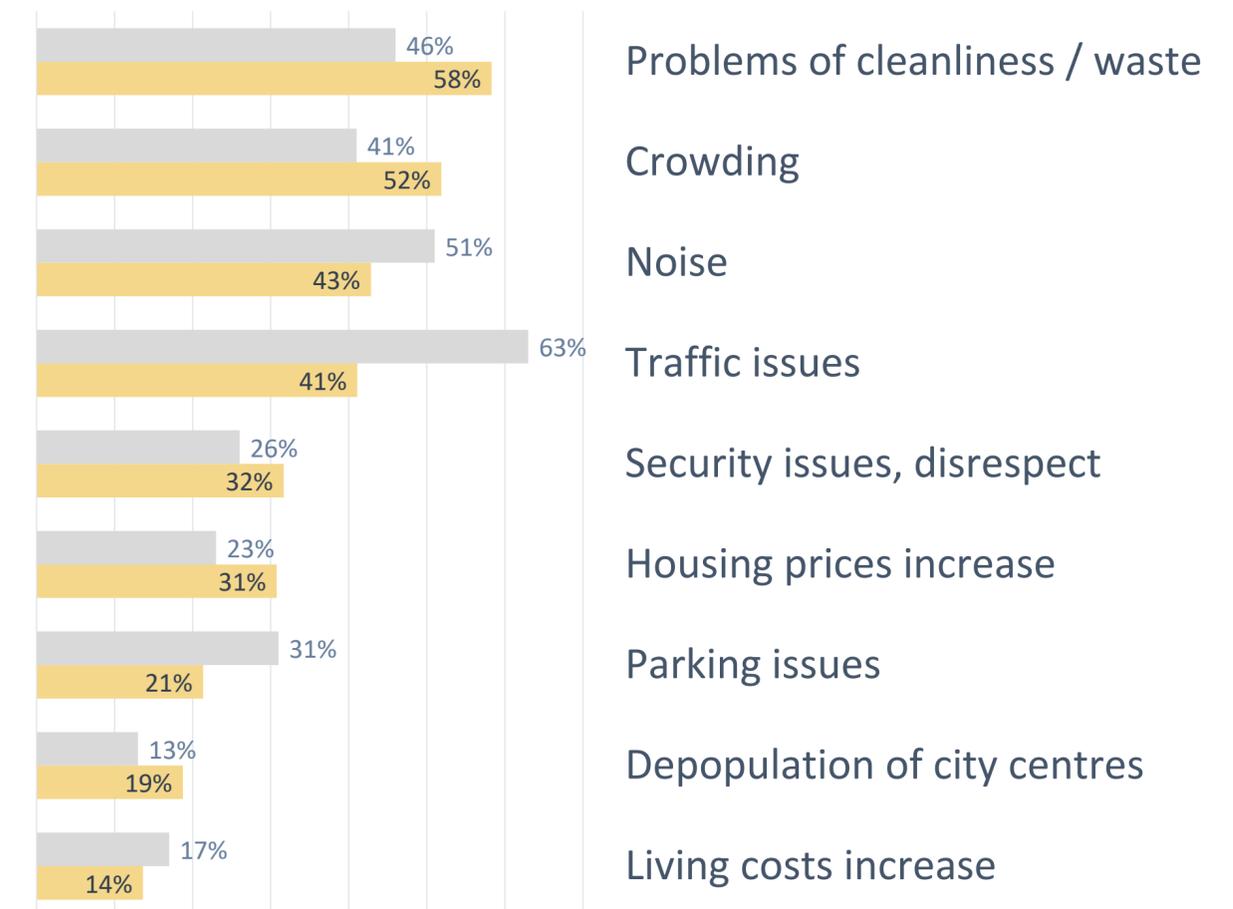
Ranking issues with regards to tourism



The figures in this graph should only be seen as estimates of the opinions of the respondents in Brønshøj-Husum and Vanløse compared to the average respondent, given the low sample size of respondents from Brønshøj-Husum and Vanløse.

Key problems reported

What type(s) of problems does tourism cause in your city?



Answers among residents stating that they experience problems due to tourism compared to the average across all respondents

■ Brønshøj and Vanløse combined (n=25)
■ Average district norm (n=351)

Overall Risk Assessment

Summary of residents' sentiment in Copenhagen

Overall, residents are positive and supportive towards tourism

- Overall, tourism is perceived to have a **positive impact**
- **The level of tourismophobia is very low** and below the norm
- The **majority of residents** are still **supportive of tourism growth**
- The extent to which residents feel that **tourism policy takes into account the impact of tourism on the life of locals** is at a **satisfying level**.



Take-Aways...



RESIDENTS
Sentiment Index

Key Findings

Summarizing Copenhagen Residents' sentiment towards tourism development

A positive tourism perception provided that tourism is developed sustainably

- The **overall sentiment** towards tourism development in the city is **positive and in line with, or above, norms**, with a low level of tourismophobia and the majority of the residents **supporting further visitation growth**.
- The overall resident mood is positive. This positive mood could be **converted further into engagement and participation** in the **tourism development**.
- Residents are **ready to engage and interact** with both visitors and city tourism stakeholders.
- Along with the usual issues caused by tourism (noise, crowding), Copenhagen residents stress specific concerns about **the environmental impact of tourism, cycling traffic** and potential risks associated with uncontrolled **housing / peer rentals development**.
- Copenhagen can count on the support of ambassadors who are employed, have good knowledge of the city (established for 7-15 years), have an occupation linked with tourism and who is occasionally host tourists.
- **Among the detractors** are young people, unemployed people and people living in Indre by. Targeted actions should be envisaged to better communicate and engage with these detractors. who may resist tourism development, if they are not considered or involved.
- **Indre By also requires short-term visible actions** to address nuisances expressed in this touristy area, with traffic, cleanliness and noise issues on the priority watchlist.



Five reasons for working with us

(though we may find plenty of others!)

TCI Research is an independent UNWTO-Awarded market intelligence agency leading in international tourism and travel competitive analysis. It provides public and private players of the visitor economy with innovative research solutions and insights combining conventional surveys with controlled Big Data analysis covering the whole visitor journey

We are a global leader in destination competitive analysis.

Our standpoint is international.

Our methodologies are endorsed and awarded by reputable tourism organizations.

We control smart integration of Big Data in combination with traditional surveys.

Our team is senior and highly flexible.



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