



CopenhagenCard

A 2017 user survey

WONDERFUL
COPENHAGEN



Table of contents

Introduction and survey design, p. 1

Key findings and recommendations, p. 3

Internationals in their 40s, p. 5

Couple and singles travelling without children, p. 7

Visitcopenhagen.com generates awareness of the CPH Card, p. 10

Transportation, simplicity and value were the main drivers for CPH Card sales, p. 11

High satisfaction with, and usage of the CPH Card app, p. 13

Satisfied users who are willing to buy again and recommend the card, p. 14

17 of the top 20 attractions were located in the city of Copenhagen, p. 18

Half of the respondents visited attractions outside of Copenhagen city, p. 21

High interest in a mobile version of the CPH Card, p. 23

30% of international tourists visited Sweden in relation to their stay in Copenhagen, p. 24

Testing Copenhagen's core stories, p. 25

Very high satisfaction with, and willingness to recommend, the city of Copenhagen, p. 29

Main appendix, p. 33

Limitations appendix, p. 40

Introduction & survey design

The CPH Card is the official city card for the Capital Region of Denmark. The card includes access to a variety of attractions as well as public transportation within the region.

The CPH Card management system went digital in 2011, which allowed for the collection of detailed information about the use of the card, including the number of visits the attractions receive from participating in the CPH Card partnership, as well as the number of attractions the card users visit during their stay in the city. This information helps the team behind the CPH Card to achieve the constantly evolving goal of giving tourists in the city the best possible experience.

The CPH Card continues to become more and more popular with tourists in Copenhagen. The number of cards activated in 2012 were 79,043, which resulted in a total of 379,220 visits to the included attractions. In 2017 these numbers grew to 173,355 activated cards and 1,021,809 visits, which is an increase of 119% and 169%, respectively. Not only the number of activated cards and total visits have increased over those 6 years, but the average number of visits per activated CPH Card have increased from 4.8 to 5.9, which is an increase of 23%.

Data collection

The data was collected by means of an online survey. CPH Card buyers, who bought their CPH Card online, were asked if they would like to participate in a survey, which aimed to find out how satisfied they were with their experience using the CPH Card as well as how the card could potentially be improved to give them a better experience during future visits to the city.

In total, 4,888 CPH Card buyers agreed to participate in the survey and received the initial invitation.

Following the invitation, two reminders were sent out to respondents who either had not opened the survey or had not yet fully completed it. These reminders were sent out with one-week intervals.

This resulted in 2,364 successful survey completions, which corresponds to a response rate of 48%.

Objective

The goal of the survey has been to better understand the users of the CPH Card in terms of:

- ✓ Their opinions about, and preferences for, city cards and city-break vacations
- ✓ Their use of the CPH Card and whether they would expect to buy one on future visits to Copenhagen
- ✓ Their search for information about the CPH Card as well as the city of Copenhagen, including topics and methods
- ✓ Their travel preferences, the attractions that they chose to visit, their use of public transportation as well as their use of the discounts that are a part of the CPH Card

The insights collected about various aspects of the CPH Card and the respondents' holiday in Denmark have been used to formulate suggestions for possible improvements of the current CPH Card, in order to ensure tourists, who chose to buy a CPH Card, have the best possible experiences during their holiday.

Limitations

Only respondents who bought their CPH Card online were asked to answer this survey. As a result, these findings cannot be expected to accurately reflect the opinions, behaviour and preferences of the average CPH Card buyer nor the average tourist in Copenhagen.

Comparing the age and nationality distributions of the 2017 respondents to the 2015 respondents, shows that the respondents in the two surveys were very similar in terms of age and nationality. Therefore, these results are assumed to be a valid estimate of the average online CPH Card buyer.

For detailed comparisons between the 2015 and 2017 survey distributions please see the appendix on page 40 to 41.

Method

This report summarizes and highlights the results of the 2017 CPH Card survey using various statistical methods to look for statistically significant results, including potential differences between groups of respondents.

The data has, furthermore, been compared to the 2015 dataset, which was the basis of the latest report released in 2016.

Comparison between groups of respondents, across variables or across datasets (2015 vs. 2017 survey) has only been explained when the results were statistically significant, as is the case with, for instance, the average number of attraction visits amongst Danish and international respondents.

Danish and international respondents will be analysed separately in many sections of this report, due to the Danish respondents having more knowledge of, and experience with, Copenhagen. This is done because the majority of CPH Card buyers are international travellers and it is important to accurately reflect the behaviour and opinions of the respondents who do not have a lot of pre-existing knowledge of, and experience with, Copenhagen (81% of international travellers were first time visitors to Copenhagen, compared to 12% amongst Danish travellers).

Lastly, the data has been compared to data from the LPOS system, which is the system that continuously collects information from the chip on the card, about the use of the CPH Card, including details about the different attractions that each CPH Card buyer chooses to visit. This is done to further increase the quality of the data, that this report is based on and to make sure that it is as representative of the actual behaviour of the CPH Card buyers as possible.

All data in this report has been anonymized and aggregated and will in no way display the behaviour of individual CPH Card buyers.

Key findings and recommendations

This section summarizes the key findings from the report. To find the full information regarding any of the below key findings please read the corresponding sections of the report.

Majority of international respondents

Much like the 2015 survey conducted amongst online buyers, the majority of the respondents in this survey were international tourists. The percentage of international tourists had, although, increased from 87% in 2015 to 92% in 2017.

Single couples without children

The majority (46%) of the respondents travelled to Copenhagen with one other adult and no children, while the second most common group (14%) were single adults travelling without children. This was especially the case amongst international respondents, of which 78% travelled without any children, while in contrast 77% of the Danes travelled with one or more children.

Most internationals were first time visitors

81% of the international respondents were first time visitors to the city, while 15% had been to Copenhagen between one and three time prior and the remaining 4% had been to the city four or more times before. As for the Danes, 58% had been to Copenhagen four or more times before, while just 12% were first time visitors.

Copenhagencard.com & VisitCopenhagen.com as the main awareness drivers

These two websites, as might be expected, were the main two sources of information used by the respondents to discover the CPH Card and to do more research about the features of the card.

VisitCopenhagen.com, combined with search engines like Google or Bing, were the main drivers in creating the initial awareness of the card amongst the respondents, while both the official CPH Card website (87%) and the official Visit Copenhagen website (55%) were used to find more information about the card.

14% of the respondents did, however, say that they were initially made aware of the CPH Card through recommendations from friends or family. This is quite a low percentage compared to the fact that the CPH Card received a NPS of 79 in this survey and, while the 2015 survey did not include a NPS questions, 95% of the respondents in 2015 said that they were likely or very likely to recommend the CPH Card to friends and family.

A possible way to increase the awareness created through word-of-mouth could be to offer users a discount to the card, if they are able to provide the name and e-mail of the person who recommended it to them.

Alternatively, social media contests about sharing your best moments on Facebook, Twitter or Instagram for the chance to win a prize could also help boost awareness through electronic word-of-mouth.

Free transportation, simplicity and value for money were the main sales drivers

97% of the respondents chose both the simplicity and practicality of the CPH Card as well as the free access to public transportation within the Capital Region, as the main drivers behind their decision to buy a CPH Card. Value for money was, however, also amongst the top drivers, being chosen by 94% of the respondents.

The overview of and access to cultural attractions was chosen by 89% of the respondents, while the remaining purchase motivations were chosen by half or less of the respondents.

Given that these purchase motivators were, by far, the main drivers behind the respondents' decision to buy a CPH Card, they should be the main aspects of the CPH Card promotional material, to increase future sales.

Furthermore, based on the results in this survey, a subset of the respondents seemed to not fully realize the value of public transportation being included in the CPH Card, and as such a higher emphasis could be put on the value of the included public transportation to both increase sales and satisfaction of the CPH Card.

High quality CPH Card app

53% of the respondents used the CPH Card app during their stay in the city. Between 73% and 96% of these respondents were satisfied with the individual features of the app, with ease of use being rated the highest and the level of information about public transportation being rated the lowest, albeit still highly (73% satisfaction).

The high degree of satisfaction with the CPH Card app could be used to further promote it and increase the percentage of CPH Card users, who decides to use the app.

Furthermore, 59% of the respondents said that they would be interested in a mobile version of the CPH Card, eliminating the need to carry around a physical card. If such a version of the card was developed, it would likely further increase the percentage of CPH Card buyers who would use the CPH Card app.

A larger userbase would mean more users who could potentially receive push-notifications about special events, exhibitions or discounts, which could improve the tourists overall experience in

Copenhagen and, as a result, increase their overall satisfaction with both the CPH Card and the city of Copenhagen.

51% travelled outside of Copenhagen City, 30% chose to visit Sweden

More than half of the respondents used their CPH Cards to visit attractions that were located outside the city of Copenhagen. 14% chose to visit attractions located in urban Copenhagen, while 43% chose to travel further and visit attraction in the area of North Zealand. Furthermore, close to a third of the respondents chose to visit Sweden during their stay.

More attraction visits

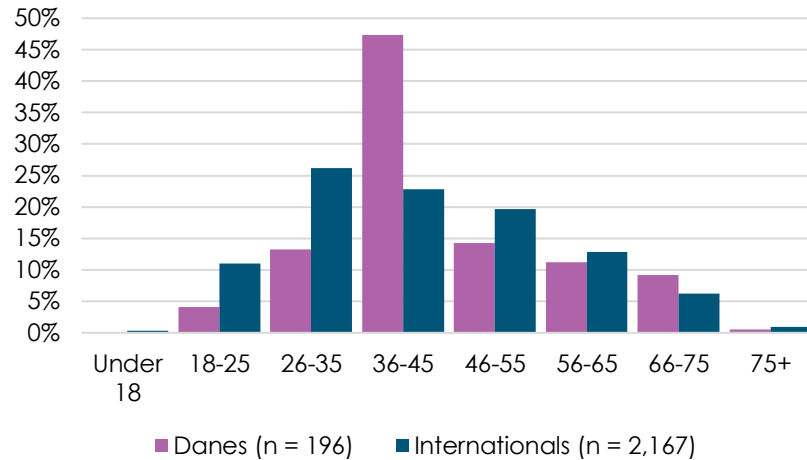
Between 20% and 53% of respondents said that they would have visited a subset of the included attractions even if they had not purchased a CPH Card. This means that between 47% and 80% of the respondents who visited those attractions were convinced to do so because of the CPH Card. **This information, combined with the high degree of satisfaction with the CPH Card (4.7 out of 5) and the fact that respondents, on average, visited 7.3 attractions, can be used to:**

- 1. Convince new attractions to join the CPH Card partnership**
- 2. Prove to existing partners that the CPH Card is beneficial for both them and the city of Copenhagen**

Internationals in their 40s

This section of the report looks at the demographics of the survey respondents, specifically their age and nationality, to see which demographics were most common amongst the respondents.

Looking at the age distribution of the respondents it shows an interesting difference between the Danish and the international respondents. Almost half of the Danish respondents were in the age group 36-45, while the highest percentage of international respondents in any one group was 26%, as show below:



The average age for the Danish respondents was 45, while the average age for the international respondents was 42.

A clear majority (92%) of the respondents were international tourists, The top five nationalities (52%) are shown on the right. The full list of nationalities can be seen in the appendix on page 33.



16% of the respondents were from the UK



14% of the respondents were from the USA



10% of the respondents were from Italy



8% of the respondents were from Denmark



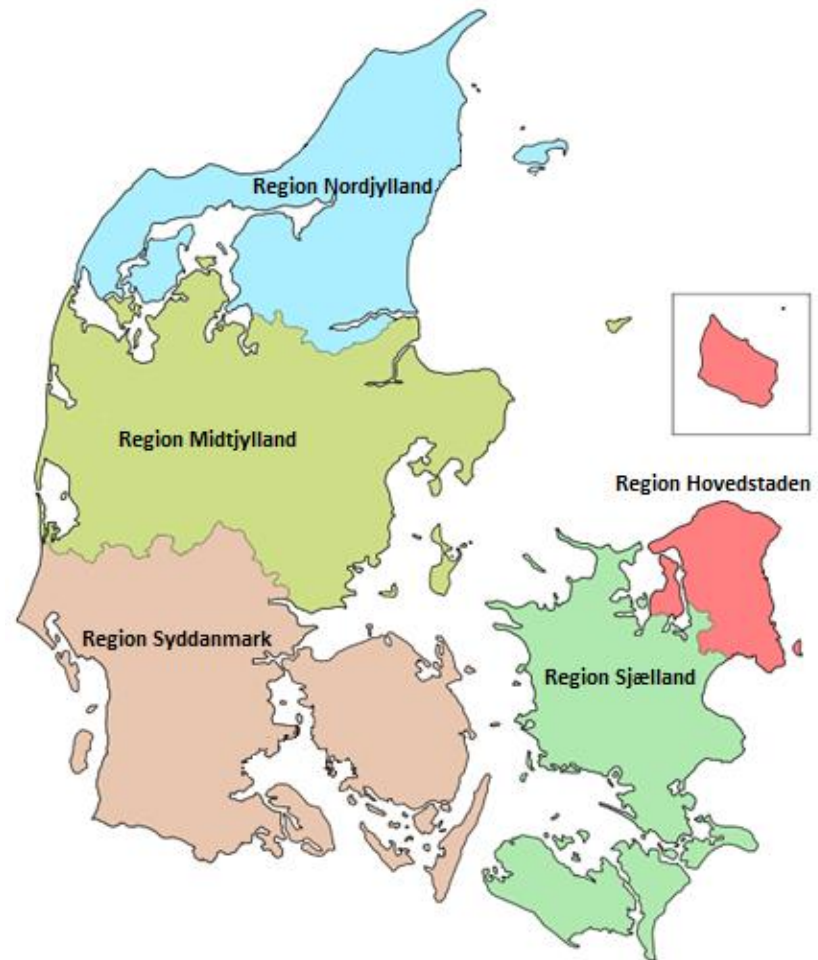
5% of the respondents were from Germany

Looking at the Danish respondents, specifically, shows that the majority were visitors from the Southern part of Denmark as well as Jutland. Specifically:

- ✓ **38% were from the region of Middle Jutland**
- ✓ **31% were from the region of Southern Denmark**
- ✓ **17% were from the region of Northern Jutland**
- ✓ **8% were from the Capital Region of Denmark**
- ✓ **5% were from the region of Zealand**
- ✓ **2% were from the municipality of Bornholm**

In other words, the majority (55%) of the Danish respondents were visitors from Jutland. Comparing this to the 2015 survey, shows minor changes in percentage amongst the regions. Most notably, the percentage of Danish respondents from the region of Middle Jutland has decreased by -7% compared to 2015. Amongst the other regions:

- ✓ **3% more were from the Capital region of Denmark**
- ✓ **3% more were from the region of Southern Denmark**
- ✓ **2% more were from the region of Zealand**
- ✓ **1% more were from the municipality of Bornholm**
- ✓ **-1% less were from the region of Northern Jutland**



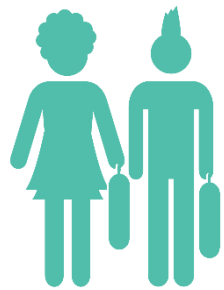
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Couples and singles travelling without children

This section looks at the respondents' travel preferences, including whether they travelled with children or other adults, what their choice of accommodation was and the length of their stay in Copenhagen.

Couples travelling without children

The majority (63%) of the respondents had one adult travel partner, while:



- ✓ 18% travelled alone
- ✓ 63% travelled with one other adult
- ✓ 7% travelled with two other adults
- ✓ 6% travelled with three other adults
- ✓ 5% travelled with four or more other adults

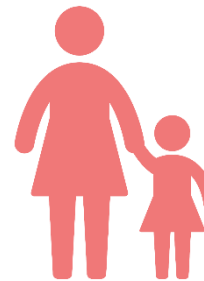
While the majority of the respondents had one or more adult travel partners, the majority also travelled without kids:



- ✓ 73% travelled without any kids
- ✓ 11% travelled with one kid
- ✓ 11% travelled with two kids
- ✓ 5% travelled with more than two kids

Interestingly, there was a difference between Danes and international tourists in terms of whether or not they travelled with children. 77% of Danes travelled with at least one child, with most of them (40%) travelling with two children. 78% of the international tourists, however, travelled without children.

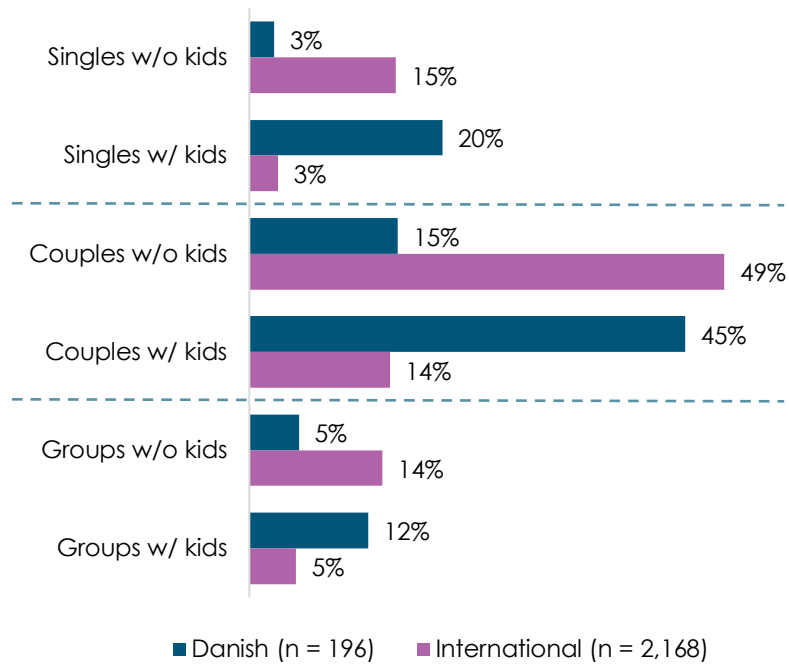
The respondents who travelled with kids under the age of 10, had the option to include two of them on their adult CPH Cards. 66% of the parents who travelled with kids made use of this options, specifically:



- ✓ 34% did not include any children on their adult CPH Card
- ✓ 39% included one child on their adult CPH Card
- ✓ 27% included two children on the adult CPH Card

In total, almost half (46%) of the respondents were couples who were visiting Copenhagen without any kids. The second largest group (14%) was single adults travelling without any kids.

This difference in group composition between Danes and Internationals is further illustrated in the graph below.



In the graph, groups are defined as three or more adults travelling together, while couples consist of just two adults.

There was a significantly higher percentage of Danish respondents in each of the three group types (singles, couples and groups) that travelled with kids compared to the international respondents.

This is interesting because there is a general notion at many tourist attractions that the primary group composition of visitors are families with children and, while the results of this survey suggest that this is the case amongst Danish tourists, it is not the case amongst the international tourists, who make up the majority of the online CPH Card buyers (92% in the case of this survey).



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Most tourists were first time visitors to Copenhagen

More than half the tourist visiting Copenhagen are international tourist. Among the international leisure segment (City breakers) 51% visit Copenhagen for the first time, however, as many as 81% of the CPH card users are first-time visitors. The card hence seems to be especially appealing to first-time visitors.

Amongst the respondents of this survey:

- ✓ **12% of Danish tourists and 81% of international tourists were first-time visitors to Copenhagen**
- ✓ **30% of Danish tourists and 15% of international tourists had been to Copenhagen one to three times prior**
- ✓ **58% of Danish tourists and 4% of international tourists had been to Copenhagen four or more times prior**

Interestingly, the number of first time visitors amongst both Danish and international respondents had increased from 2015, where 7% of Danish respondents and 77% of international respondents were first-time visitors.

As might be expected, the amount of time that had passed between the respondents' latest visit and the one prior to that was larger for international tourists than it was for Danish tourist:

- ✓ **22% of Danish tourists and 7% of international tourist had visited Copenhagen previously within the last 3 months**
- ✓ **48% of Danish tourists and 21% of international tourists had visited Copenhagen previously within the last year**
- ✓ **73% of Danish tourists and 43% of international tourists had visited Copenhagen previously within the last 3 years**

Staying the night at a hotel

The length of stay for both Danish and International tourists was similar, given that the average length of stay for Danish tourists was 3 days, while the average length of stay for international tourists was 4 days.

While the two groups were similar in terms of length of stay, however, there were larger differences in their choice of accommodation. Although both Danish and International respondents preferred hotel as their main choice of accommodation, their secondary and tertiary choices differed. The **Danish tourists** had the following top accommodation choices:



- ✓ **Hotels (35%)**
- ✓ **Friends and family (21%)**
- ✓ **Holiday cottages/apartments (12%)**
- ✓ **Hostels (11%)**

While the **international tourists** had the following accommodation priorities:



- ✓ **Hotels (56%)**
- ✓ **Airbnb (26%)**
- ✓ **Hostels (9%)**

Interestingly, only 6% of the Danish tourists chose to rent accommodation through Airbnb, which was the second most popular choice amongst the international tourists. In 2015, 17.9% of international respondents stayed in an Airbnb apartment, while this was the case for 5% of Danish respondents.

It is, however, possible that there is an overlap between "Airbnb" and "holiday cottages/apartments", which should be considered when looking at the above results.

Interestingly, the Airbnb guests, on average, bought longer duration cards and, as expected, also stayed longer on average compared to the respondents who chose to stay in a hotel or in a hostel. Respondents who stayed in an Airbnb rental stayed, on average, 4.4 nights, while the average for respondents staying in hotels and hostels was 3.5-3.6 nights.

The full list of bed nights and accommodation options can be seen in the appendix on page 34.

VisitCopenhagen.com generates awareness of the CPH Card

This section looks at the respondents' initial source of awareness about the CPH Card, as well as where the respondents found additional information about the card.

The following were the main sources of initial awareness about the CPH Card, for the majority of the respondents¹:

- ✓ **VisitCopenhagen.com (55%)**
- ✓ **Previous experience with city cards combined with online searches for a city card in Copenhagen (22%)**
- ✓ **Word-of-mouth from friends/family (14%)**
- ✓ **Search engines like Google or Bing (14%)**

The remaining channels included in the questionnaire were all used by 3% or less of the respondents to gain initial awareness of the card.

Notice, however, that three of the four categories all include searching the web, which was likely done through search engines. A large amount of the traffic that Visit Copenhagen's website receives, for instance, comes from organic search traffic through search engines like Google or Bing.

The communication channels used by the respondents to find additional information about the CPH Card were very similar to the ones used to gain initial awareness, with one expected difference being the official CPH Card website²:

- ✓ **Copenhagencard.com (87%)**
- ✓ **VisitCopenhagen.com (55%)**
- ✓ **Search engines (20%)**
- ✓ **Copenhagen airport (8%)**

The remaining information sources were used by less than 5% of the respondents. What is interesting, however, is that 55% of the respondents still mention Visit Copenhagen's website as one of their sources for additional information about the card, while also using the official CPH Card website.

8% of the respondents, which amounts to 196, furthermore, said that they received more information about the card while at the Copenhagen airport, suggesting that they either did not research everything from home or that they might not have been able to find all the information that they wanted online.

The CPH Card Facebook page was used by less than 2% of respondents, to establish their initial awareness of the card as well as to find further information about it.

¹⁻² Respondents could choose more than one initial source of information, which means that the percentages do not reflect respondents unique to the select information channel. The full list of information sources can be found in the appendix on page 35.

Transportation, simplicity and value were the main drivers for CPH Card sales

This section looks at why respondents decided to buy a CPH Card. As previous results in CPH Card surveys have also shown, the free access to public transportation in and around Copenhagen was very important to the users. Specifically:

- ✓ **97% found that the simplicity and practicality of having everything combined in one card was important**
- ✓ **96% found that free access to public transportation was important**
- ✓ **94% found that the value for money that the CPH Card provides was important**
- ✓ **89% found that the overview of and access to cultural attractions was important**
- ✓ **51% found that good experiences with other city cards was important**
- ✓ **37% found that recommendations from others were important**
- ✓ **22% found that it was important that an adult CPH Card includes access for up to two children under the age of 10**

These drivers had changed slightly from 2015, given that:

- ✓ **9% more thought that previous experiences with other city cards was important**
- ✓ **3% more thought that value for money and simplicity was important**
- ✓ **2% less thought that the free inclusion of children under 10 years was important**
- ✓ **8% less thought that recommendations from others was important**

A more detailed breakdown of the 2017 respondents' motivation for buying a CPH Card can be seen in the appendix on page 36.

Both the Danish and international users gave similar responses for most of the mentioned purchase motivations, however, there were a few areas where one or both groups' opinions varied significantly from the average:

- ✓ **66% of Danish respondents found that the overview of and access to cultural attractions was important**
- ✓ **25% of Danish respondents found that good experiences with other city cards was important**
- ✓ **19% of international buyers found that the included access for children under the age of 10 was important, while this was the case for 47% of the Danish buyers.**

The fact that Danes put a higher emphasis on the importance of being able to include young children on adult CPH Cards, than the international tourists, reflects the fact that more of the Danish CPH Cards buyers were travelling with kids when they visited Copenhagen, as opposed to the international tourists.

Interestingly, more than half of the international respondents found that previous experience with other city cards was an important factor when deciding whether to buy the CPH Card or not. While this factor cannot be directly influenced by the CPH Card team, it can, however, be indirectly influenced either through cooperation with other cities or by using marketing to differentiate the CPH Card from the cards that competing cities offer.

4+ daily trips using public transportation

One of the most important aspects of the CPH Card, in the eyes of the respondents, was the access to public transportation. 97% of the respondents thought that access to public transportation was important or very important for their decision to buy a CPH Card and this is also reflected by other results in this survey.

For instance, 95% of the respondents said that they used their CPH Card to travel with public transportation during their stay in the city. This is lower than the number of respondents who said that it was an important aspect for their decision to buy the CPH Card, which could be due to the fact that a lot of the larger attractions in Copenhagen are within a short distance of each other, which allows for tourists to walk between them, if they, for instance, want to explore the city while moving between attractions. This could also mean that access to public transportation was important when the respondents bought the card, but it later turned out that they did not need that access, because they were able to walk between the attractions and other locations in Copenhagen.

Looking at the respondents who did use public transportation, however, reveals that many of them used it 4 or more times per day during their stay. Specifically, 62% of the respondents used their CPH Card on public transportation 4 or more times each day, while a third (33%) said that they used public transportation 2-3 times daily and just 5% said that they used public transportation once per day. The full breakdown can be seen in the appendix on page 37.

As for other means of transportation:

- ✓ 11% used a taxi service
- ✓ 6% used a bicycle
- ✓ 6% used a car

Most of the respondents who used a car were Danish citizens. Specifically, 26% of Danish citizens used a car during their stay in Copenhagen, while just 4% of the international tourists used a car to get around the city.

6% said that they used a bicycle during their stay in the city, but just 1% of the respondents said that they used the discount that the CPH Card offers for bicycle rentals, which is interesting. 99% of the respondents who said that they used a bicycle were international tourists, which likely means that their only option to use a bicycle was to rent one. This creates the question of whether they rented a bicycle from a store that did not offer a discount through the CPH Card or whether they simply forgot about the discount when they were renting the bicycle. Or they stayed in a hotel, offering bikes for rent or to borrow.

Furthermore, just 3% of the international respondents said that they stayed with friends or family, from which they could potentially have borrowed a bicycle. Out of the 72 respondents who stayed with friends/family while in Copenhagen just 7% said that they used a bicycle for transport.

High satisfaction with, and usage of the CPH Card app

This section looks at the CPH Card mobile app, which is available for Android and iOS and contains information about the various attractions that the card grants access to, as well as an integration of Google Maps, which allows users to get detailed directions to the attractions they want to visit.

More than half of the respondents (53%) said that they used the CPH Card app in relation to their stay in Copenhagen. Out of these:

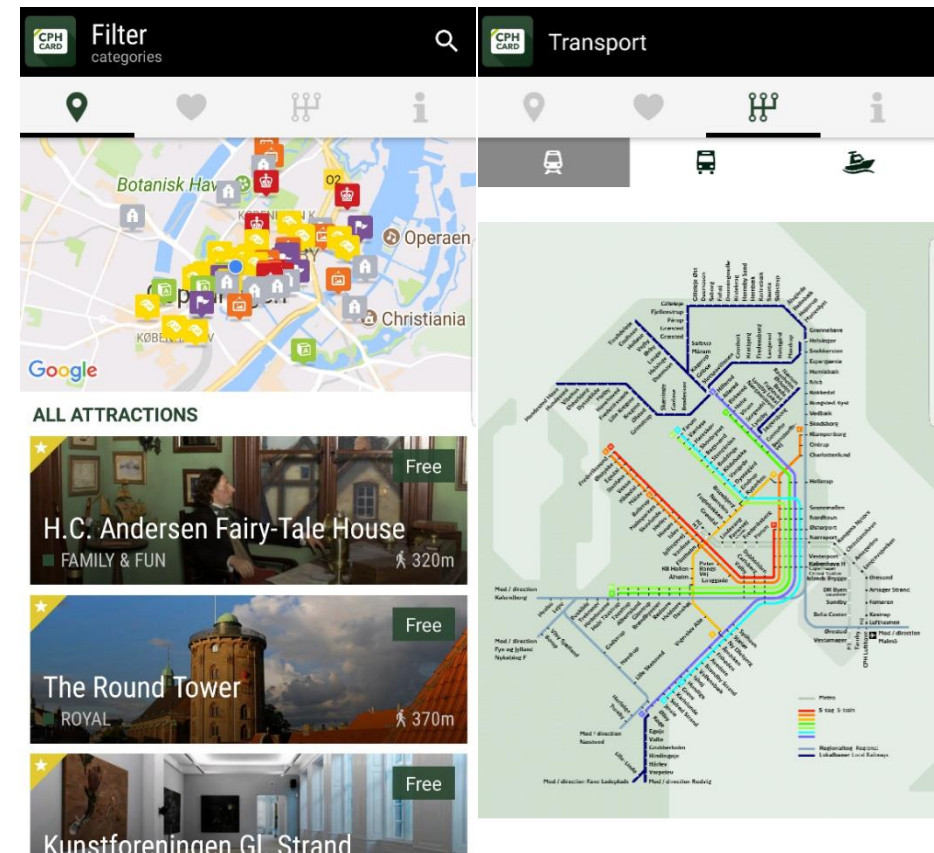
- ✓ 96% thought that the app was easy to use
- ✓ 88% thought that the app contained sufficient information about attractions and museums
- ✓ 84% thought that the integrated map was easy to use
- ✓ 73% thought that the information about public transportation within the region was sufficient

The respondents' opinions had changed slightly from the 2015 respondents in terms of two of the aspects of the app:

- ✓ 4% more thought that the app was easy to use
- ✓ 4% less thought that the information about public transportation was sufficient

Most of the respondents were, in other words, satisfied with the contents and the design of the CPH Card app. Whether the app included all the features that the respondents would like, was outside the scope of this survey, but a survey will be conducted in the first months of 2018 which specifically looks at whether the CPH Card users are happy with the current list of features or

whether there are other features that they would like to see implemented, in order to improve the experience that the users have with the app.



Satisfied users who are willing to buy again and recommend the CPH card

This section looks at the respondents' overall satisfaction with the CPH Card as well as their willingness to repurchase in the future and willingness to recommend to family and friends

A more detailed breakdown of the following information can be found in the appendix on page 37-39.

Very high satisfaction with the CPH Card

The overall satisfaction with the CPH Card was very high amongst the survey respondents, who, on average, rated their satisfaction at 4.7 out of a maximum score of 5, which is an increase of 0.3 compared to the 4.4 average in 2015.

97% of the respondents rated their satisfaction with the CPH Card at 4 or 5, while 74% gave the maximum satisfaction score of 5. There was also a small tendency towards respondents with longer duration cards to be slightly more satisfied with the CPH Card, than respondents who bought shorter duration cards, which could be because they had time to visit more of the included attractions and, as such, felt like it added more value to their stay.

Similar answers were given by the respondents regarding whether it was likely that they would buy a CPH Card again, if they were to return to Copenhagen in the future. The average score for this was 4.5 out of 5, which is slightly lower than the average of 4.6 from the 2015 survey. However, 21% said that it was likely that they would buy a CPH Card in the future, while 67% said that it was very likely.



Many reasons to buy a card again during future visits to Copenhagen

As shown above, most of the respondents were very satisfied with their purchase of the CPH Card and many of them also said that they would likely buy the card again, if they return to Copenhagen.

The main reasons for this have been visible in the previous sections of this report. This section, however, looks at the respondents' own descriptions of why they would like to purchase the card again on future visits to Copenhagen.

The word cloud below contains the top 25 most used words from the respondents' descriptions:



Some answers were very detailed and mentioned a lot of the different aspects, while others were more specifically about a single aspect, like public transportation.

The examples below are some of the more detailed explanations given by the respondents, that cover several aspects of the CPH Card.

“Access to public transport and places of interest allowing me to make maximum use of my time in Copenhagen.”

“Convenience of not having to line up and buy tickets. And the freedom to just go wherever we wanted because transport was free and the entrance to lots of attractions were included.”

“Ease of use instead of carrying cash or charging at location. Already taken care of before leaving USA so know the expense ahead of trip”

“We were 3 nights, all days we went sightseeing and visited many museums and attraction park, but we saw just 3 % of this beautiful country.”

Value for money

Interestingly, some of the respondents tried to calculate their savings, which they commented on. The amount, as expected, varies from respondent to respondent, but it serves to highlight the respondents focus on value for money:

“We saved at least 850 Kr. each - or 3,400 Kr. if you take all 4 of our cards into account, which is a lot. That's more important than the convenience of the card.”

“We saved around 400DKK each”

“The card is practical and I've save more or less 250DKK”

Very high willingness to recommend

Willingness to recommend is usually measured on a so-called Net Promoter Score (NPS), where respondents rate their willingness to recommend the CPH Card to others, on a scale from 0 to 10.

The respondents are then classified as one of three groups, based on the answer they give. These groups are as follows:

The first group are the **promoters**, which consists of respondents who answer 9 or 10 on the scale. These respondents are the most likely to actively recommend the CPH Card to others. 81% of the respondents in this survey were promoters.

The second group are the **neutrals**, which consists of respondents who answer 7 or 8 on the scale. These respondents are not expected to actively recommend the CPH Card, but might recommend it, if they are asked about their experiences with, or their opinion of, the card. 16% of the respondents in this survey were neutrals.

The last group are the **detractors**, which consists of respondents who answer between 0 and 6 on the scale. These respondents are considered to be the ones least likely to recommend the CPH Card to others. 2% of the respondents in this survey were Detractors.

The NPS is the difference between the percentage of promoters and detractors in a survey. **The CPH Card received a NPS of 79 in this year's survey**, which is very high considering that the NPS measure has a max of 100.



Focus on transport and ease of use when recommending

When asked which aspects of the CPH Card the respondents would recommend, the majority of them focused on the included access to public transportation as well as how the CPH Card makes it easy to be a tourist in Copenhagen. The word cloud below shows the top 25 most used words in the respondents' own descriptions of what they would recommend about the CPH Card:



Some answers were very detailed and mentioned a lot of the different aspects, while others were more specifically about a single aspect, like public transportation. The examples to the right are some of the more detailed explanations given by the respondents, that cover several aspects of the CPH Card.

“We were going on a Baltic cruise and hence would need 5 currencies which is rather cumbersome. Having the Copenhagen card meant we could get by with just the card and a Master and no currency. It made our visit so simple in that regard. It was a great value and simple to use. I would highly recommend it.”

“You can see the variety of attractions in the city, offering a wide range of the best options to see in Copenhagen, easy to use and solving the problem of public transport”

“Simplicity: No need for copious amounts of cash. Saves money. Experienced more because all entries pre-paid for.”

“Outstanding value for money with the major attractions included in the offer. We were able to visit about 12 attractions in our 48-hour period, which was fantastic. Having the public transport was the icing on the cake.”

“It was the best thing I did. It made life very, very easy. No thinking about transport change, entry costs and no waiting in lines. This was amazing as, I have travelled in the peak tourist season. I have had a fantastic experience using this card.”

*Comments have been translated into English and non-descriptive words (“it”, “and” etc.) as well as low usage words (<3 times) were not included.

17 of the top 20 attractions are located in the city of Copenhagen

This section uses LPOS data to analyse the most visited attractions amongst the respondents in this survey.

17 of the top 20 attractions are located within the city of Copenhagen, which are the attractions that are expected to receive the highest number of visits from tourists staying within the city. Interestingly, however, there are 3 attractions on this list that are all located in the area of Northern Zealand. These are:

- ✓ **Kronborg Castle in Elsinore**
- ✓ **The National History Museum in Hillerød**
- ✓ **Louisiana Museum of Modern Art in Humlebæk**

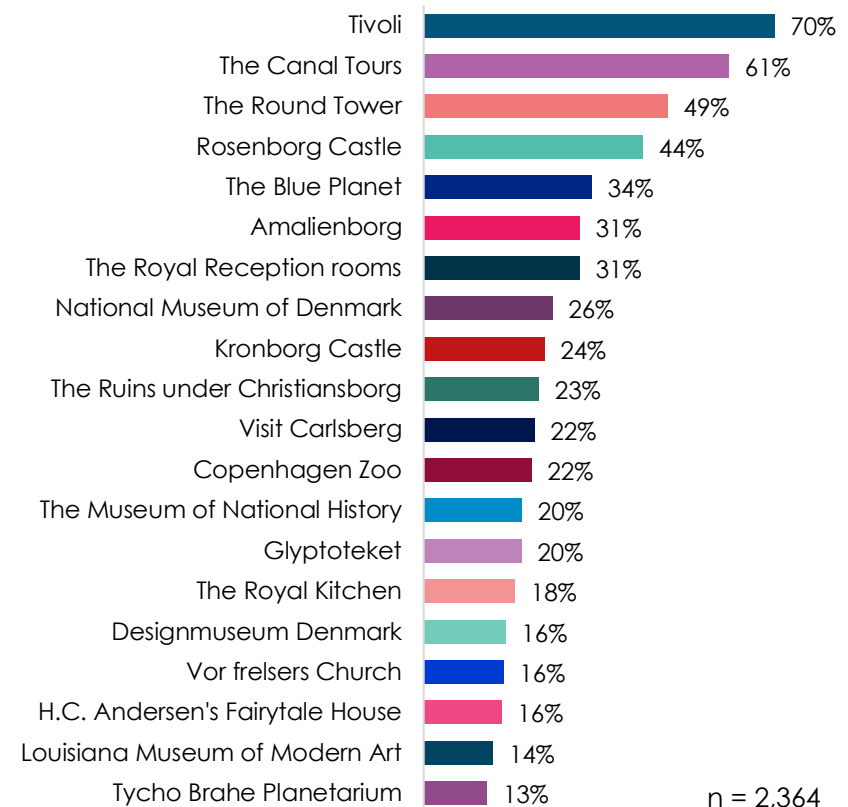
In other words, between 14% and 24% of respondents travelled out to the area of Northern Zealand to visit one of the attractions included in the CPH Card.

There are 7 included attractions located in the urban area of Copenhagen in between the city of Copenhagen and the area of Northern Zealand, however, these are not included in the top 20 even though up to 24% of respondents were willing to travel to the area of North Zealand to see one or more attractions.

Out of the 7 attractions included in the CPH Card, which are located in urban Copenhagen, the following 3 had the highest number of visits:

1. **The Experimentarium in Hellerup was visited by 10% of the respondents**
2. **Frilandsmuseet in Kongens Lyngby was visited by 1% of the respondents**
3. **Arken in Ishøj was visited by 1% of the respondents**

Top 20 visited attractions



19 of the 20 above attractions were also the most popular amongst all CPH Card buyers, with the exception of the Tycho Brahe Planetarium, which was number 21.

The CPH Card leads to more attraction visits

Copenhagen is a city that has many popular tourist attractions, including Tivoli and The Canal Tours in the centre of the city as well as Copenhagen Zoo and Kronborg Castle outside of the city centre.

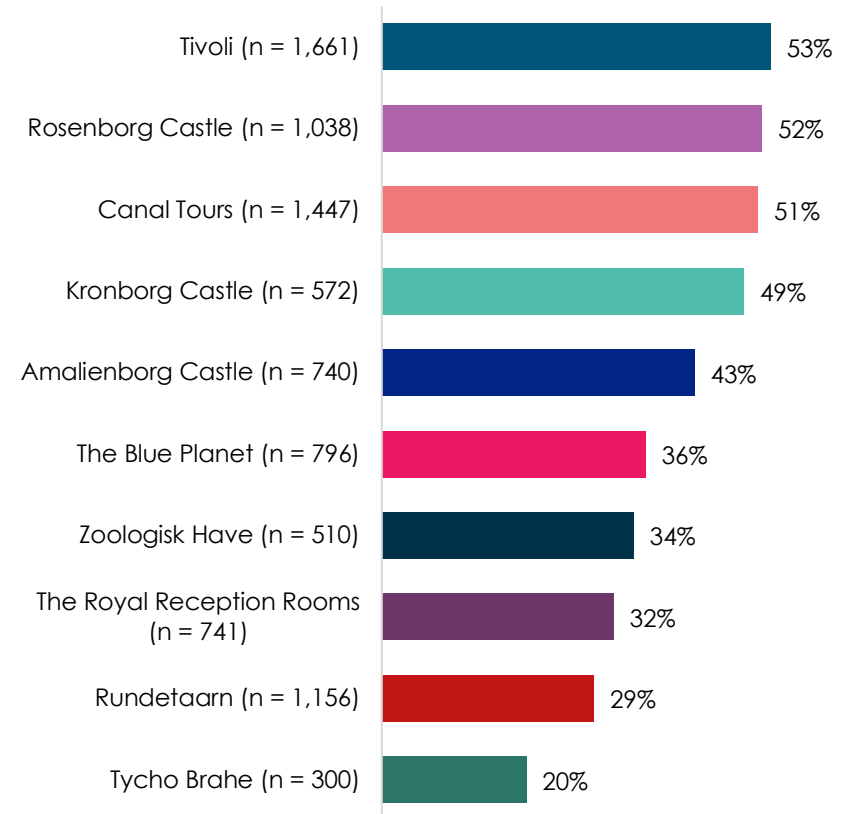
This section looks at whether the tourists would have visited these attractions even if they had not bought a CPH Card that granted free entrance to them.

The respondents' answers were validated using data from LPOS to ensure that only answers from respondents who had visited each of the attractions were included in the calculations.

As the graph on the right shows, many of the respondents said that they would have been willing to visit the attractions, even if they had not bought a CPH Card. This does, however, also show that 47-80% of the respondents visited the attraction in question because it was included in the CPH Card.

In other words, the CPH Card had a seemingly substantial effect on the respondents' desire to visit the attractions that are included in the card.

Would have still visited without a CPH Card



7 unique attraction visits, on average

As shown on the previous pages, there were quite a few attractions that were popular amongst the respondents in this year's survey. Looking at all of the respondents' attraction visits shows that they, on average, visited 7 unique attractions while in Copenhagen. There was, however, differences between the Danish and international respondents as well as differences based on the type of card that a given respondent chose to purchase.

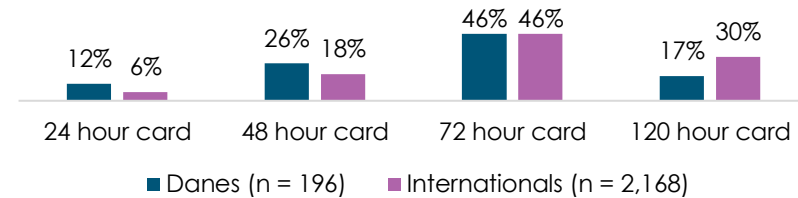
The table below shows the number of visits that the respondents made to attractions. "Attraction visits" includes repeat visits to the same attraction, while "Unique attraction visits" excludes repeat visits:

	All respondents (n = 2,364)	Danes (n = 196)	Internationals (n = 2,168)
Attraction visits	7.3	5.8	7.4
Unique attraction visits	7.0	5.5	7.1

There are several interesting aspects to these findings. First and foremost, there was a significant difference between the number of attractions visited by the Danish and international tourists, respectively. Secondly, the average respondent (Danes and internationals) visited 7 different attractions, which is higher than the average amongst all CPH Cards buyers in 2017.

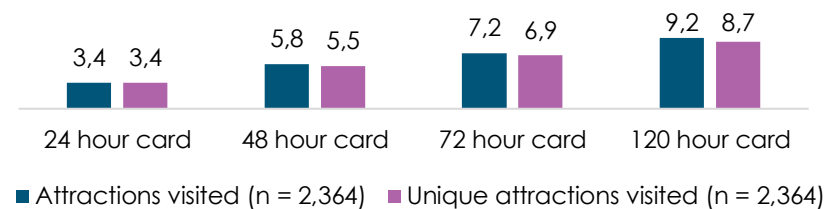
The average number of unique attraction visits for all activated CPH Cards in 2017 was 5.7 (5.8 amongst online buyers), while the average number of total attraction visits was 5.9 (6.1 amongst online buyers). That is, in other words, slightly higher than the Danes from this survey, but significantly lower than the internationals.

A likely explanation as to why the internationals visited more attractions, on average, than the Danes, is that almost twice as many internationals bought 120-hour cards compared to the Danes, as shown below:



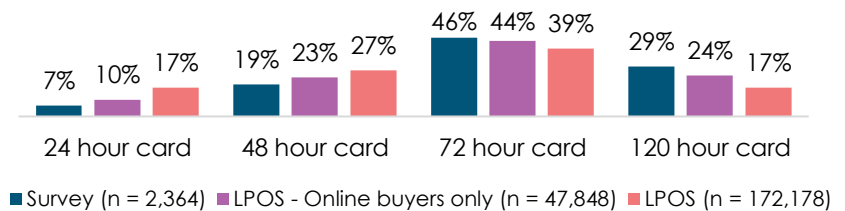
It is, however, also possible that the Danes have simply visited several of the attractions before.

As expected, respondents with longer duration CPH Cards visited more attractions than other respondents:



Based on this, there is a slight indication that respondents with longer lasting cards are more likely to re-visit some attractions.

Lastly, the graph below compares that survey respondents' choice of card duration to the total number of activated cards:



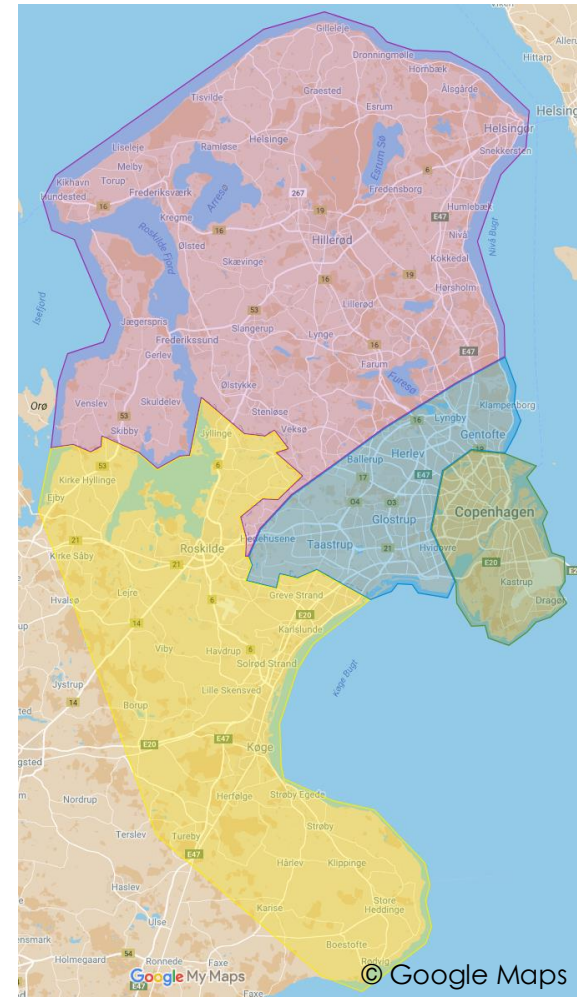
Half of the respondents visited attractions outside of Copenhagen city

While most of the attractions included in the CPH Card are located within the city of Copenhagen, there are 7 which are located in the urban area of Copenhagen as well as 14 which are located in the area of North Zealand and 10 which are located in the region of Zealand. This section uses LPOS data to determine how many respondents travelled outside of the city centre and to determine whether there might be an interest in an expanded CPH Card which covers the entirety of Zealand.

The map on the right shows a rough outline of the different areas of Denmark that are covered by the CPH Card. The areas are as follows:

- The **green** area is the city of Copenhagen
- The **blue** area is urban Copenhagen
- The **purple** area is the area of North Zealand
- The **yellow** area is the small part of the region of Zealand that is covered by the CPH Card

The next page contains a comparison of the percentage of respondents who chose to visit attractions in each of the three areas outside of the city of Copenhagen.



51% of the respondents visited attractions outside of Copenhagen City

More than half of the respondents chose to visit an attraction outside of the city of Copenhagen, located in either urban Copenhagen, the area of North Zealand or the region of Zealand. Specifically:

- ✓ **40% visited an attraction in the area of North Zealand**
- ✓ **14% visited an attraction in urban Copenhagen**
- ✓ **9% visited an attraction in the region of Zealand**

The respondents who chose to travel to the urban area of Copenhagen, on average, visited one of the attractions in the area of urban Copenhagen. Of the 7 attractions located in this area, the most popularly visited was the Experimentarium with 245 visits, 95% of which were from unique visitors.

The average number of attractions visited was higher amongst the respondents who chose to travel further outside the city of Copenhagen to the area of North Zealand. These respondents, on average, visited two attractions, with the most popularly visited being Kronborg Castle in Elsinore. Unlike urban Copenhagen, the area of North Zealand had several attractions that were popular amongst the survey respondents. The top five most visited attractions in North Zealand were:

- **Kronborg Castle with 577 visits**
- **The Museum of National History with 467 visits**
- **Louisiana Museum of Modern Art with 331 visits**
- **M/S Maritime Museum of Denmark with 161 visits**
- **The Frederiksborg Ferry with 102 visits**

99% or more of all of these visits were from unique visitors, meaning a marginal number of respondents chose to visit the attractions more than once.

Lastly, the most popular attraction in the region of Zealand was Roskilde Cathedral with 192 visits. The remaining attractions in the region of Zealand was visited by 1% of the respondents or less, resulting in 18 or less attractions visits for each of the remaining attractions in this region.

More visits than the average CPH Card user

Amongst all activated CPH Cards in 2017, 45% were used to visit attractions in urban Copenhagen and/or the area of North Zealand, which is 6% less than the respondents in this survey.

Similarly, 37% were used to visit attractions in the area of North Zealand, which is also 6% less than the respondents in this survey.

Finally, 12% were used to visit attractions in urban Copenhagen, which is 2% less than the respondents in this survey.

In other words, it is possible that the users who buy their CPH Card online are also either more willing to travel to see attractions or more used to finding directions online.

2% more than the 2015 respondents

49% of the respondents in the 2015 survey travelled outside of Copenhagen city to visit attractions included in the Copenhagen Cards. This is 2% less than the respondents in the 2017 survey, suggesting that there could be a slight upwards trend in terms of the respondents' willingness to travel outside of Copenhagen City to gain experiences.

Whether this is due to new attractions being added to the Copenhagen Card or simply due to better information about how to travel to attractions outside of Copenhagen is unknown.

It does, however, show that more than half of the respondents were willing to travel outside of the city to experience attractions, which is an opportunity for the CPH Card to expand its coverage of Denmark and the attractions located outside of the city itself.

High interest in a mobile version of the CPH Card

This section looks at the respondents' interest in other types of CPH Cards, such as one without access to public transportation and a mobile version of the card. It will, furthermore, look at the respondents' use of the discounts that are included in the CPH Card.

Access to public transportation was very important to respondents

When asked if they would like a cheaper (-25%) version of the CPH Card which would not include access to public transportation, 85% of the respondents said that they would prefer the current card, while 11% said that they would prefer the cheaper card and the rest were not sure.

Interestingly, 77% of the respondents who said that they would prefer a cheaper card without access to public transportation, used their CPH Card to travel on public transportation during their stay.

Out of these 77%, 32% answered the question about how many times on average they used public transportation during the days in Copenhagen. About half said that they used public transportation 3 or more times daily.

Based on this, it would seem that some of the respondents might not be aware of how much it would cost to use public transportation without a CPH Card and how much money they were saving by having free access with the card.

As such, more information about the possible savings related specifically to public transportation might be required to ensure that CPH Card users fully understand the value proposition of the CPH Card.

59% interested in a mobile version of the CPH Card

More than half of the respondents said that they would be interested in a CPH Card that they could access on their smartphones, as compared to needing to carry around a physical card. The majority (80%) of these, however, mention that their interest in a mobile version of the CPH Card is contingent on free access to public transportation still being included in that version of the card.

Minority of respondents used included discounts

The CPH Card includes discount to 30 restaurants, museums, bike rentals, city tours and other entertainment activities in Copenhagen. Only 29% of the respondents made use of these, however. Specifically:



- ✓ 14% used discounts for museums
- ✓ 6% used discounts for restaurants
- ✓ 6% used discounts for city tours
- ✓ 2% used discounts for other activities
- ✓ 1% used discounts for bike rental

30% of international tourists visited Sweden in relation to their stay in Copenhagen

This section looks at what other cities, if any, the respondents considered visiting before they decided to go to Copenhagen as well as how many of the respondents chose to visit Sweden, while they were in Copenhagen. This will give an idea of which other cities that Copenhagen is competing against when it comes to attracting tourists.

One third of respondents visited Sweden

30% of the international respondents (excluding Swedish residents) said that they visited Sweden during their trip to Copenhagen, while this was the case for just 2% of Danes.

This is likely related to the fact that 28% of the international respondents said that they considered vacationing in Stockholm, before deciding on Copenhagen as their travel destination.

In the 2015 survey, 27% of international respondents (excluding Swedes) visited Sweden during their stay, while 3% of Danes did the same.

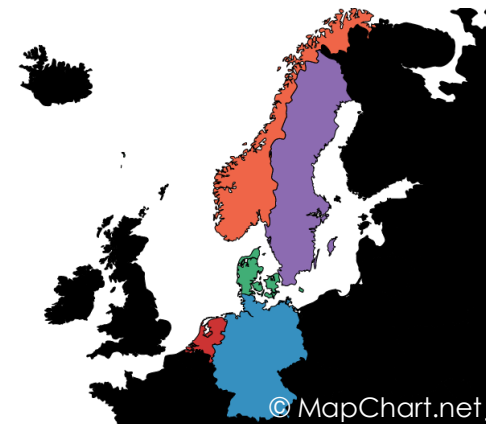
Considering the Nordic capitals as a travel destination

While Stockholm was the most popular alternate travel destination that the international respondents had considered before deciding to travel to Copenhagen, the other Nordic capital, Oslo, was the second most considered with 20% of the international respondents considering Oslo as their travel destination.

Berlin was the third most popular travel destination considered, out of the ones listed, while the cities of Hamburg, Aarhus, Odense and Aalborg were considered by 7% or less of the international respondents. 21% of the international respondents considered cities other than the one mentioned on the list, with Amsterdam and Malmo being the two most popularly mentioned destinations.

Danes mainly focused on Copenhagen

While the international respondents had somewhat varied considerations as to which city they wanted to travel to, the Danes were more focused in their decision making. 81% of the Danish respondents said that they only considered Copenhagen as their destination for this visit, with Berlin and Hamburg being the second and third most considered destinations at 9% and 7%, respectively.



Testing Copenhagen's core stories

The city of Copenhagen is marketed around six core stories that summarize the city and its culture. These are:

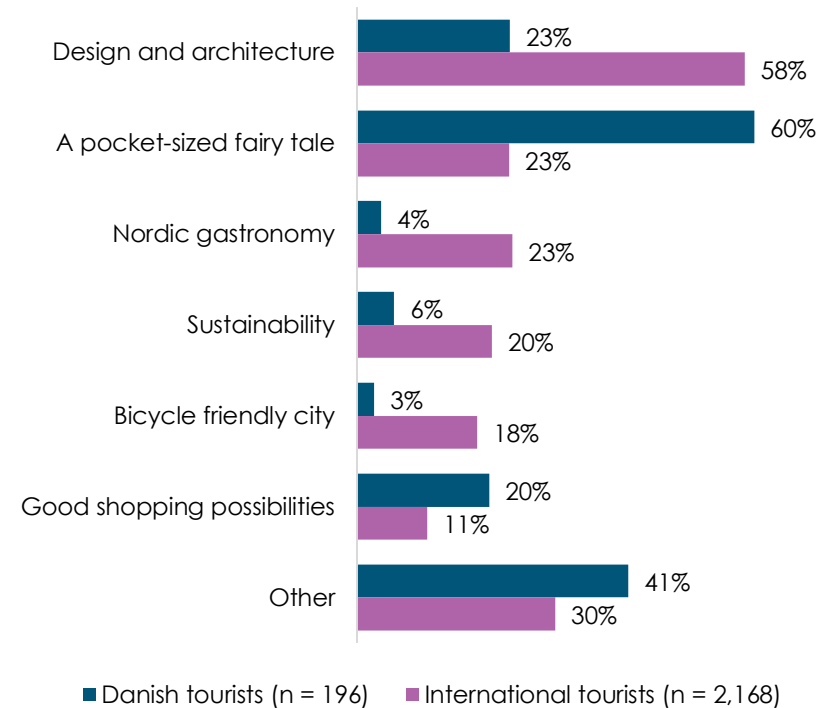
- ✓ **The Danish design and architecture**
- ✓ **The city as a pocket-sized fairy-tale**
- ✓ **A green and sustainable city**
- ✓ **A bicycle friendly city**
- ✓ **The Danish cuisine**
- ✓ **Unique Danish design and fashion available in the city's shops**

The question is whether any of these six core stories were appealing enough to the respondents, to make them want to visit Copenhagen or whether they had other motivations.

As the graph on the right shows, it would seem that, at least to an extent, these core stories are attracting both Danish and international tourists to Copenhagen. Interestingly, internationals were mainly attracted by the focus on sustainability and the ability to experience things unique to Denmark, like the Danish architecture, while the Danes liked the idea of a pocket-sized cultural experience and the shopping opportunities.

These results seem to reflect the more general motivations that the respondents had for their visit, as shown on the next page. Common for both questions was the internationals' focus on atmosphere, architecture and sustainability, while the Danish respondents' focus on a pocket-sized fairy-tale and shopping was not as obvious in their choice of other motivations. Atmosphere could be assumed to play a large role in a pocket-sized fairy-tale and yet a lower percentage of Danes chose the city's atmosphere as a motivation, compared to the internationals.

Motivation for travelling to Copenhagen



Travelling to experience a city's atmosphere

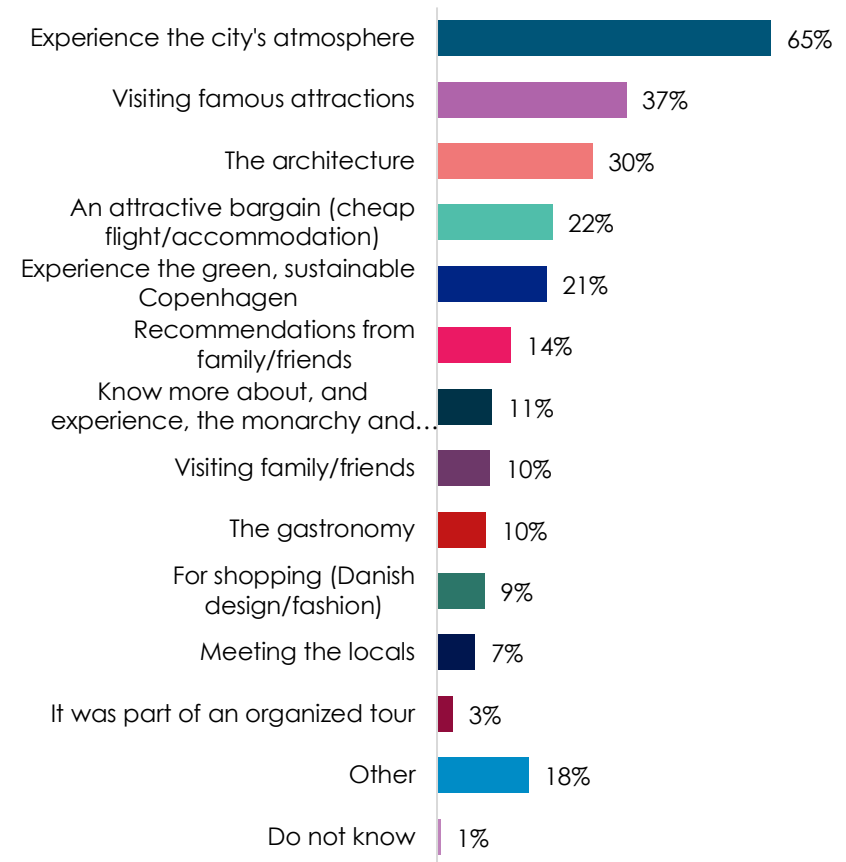
While there were quite clear differences between the Danes and internationals in terms of which of Copenhagen's core stories had an influence on their decision to visit the city, the difference between these two groups in terms of more general motivations were not as distinct.

There were only minor differences between Danes and international tourists in terms of their motivations for visiting Copenhagen, for example:

- ✓ **67% of international tourists were motivated by the atmosphere of the city, which was the case for 44% of Danes**
- ✓ **33% of international tourists were motivated by the city's architecture, which was the case for 9% of Danes**
- ✓ **23% of international tourists were motivated by experiencing the green, sustainable Copenhagen, while this was the case for 5% of Danes**
- ✓ **21% of Danes were motivated by visiting friends/family, while this was the case for 9% of international tourists**

Respondents, furthermore, seem to think that Copenhagen's attractions and architecture is part of what creates the city's atmosphere, given that 29% of respondents chose both the city's atmosphere and famous attractions and 27% chose both the city's atmosphere and its architecture. 16% chose all three motivations for visiting Copenhagen.

Motivations for visiting Copenhagen



n = 2,364

Recognizing Copenhagen for its design and architecture

After having looked at the travel motivations of the respondents, it is interesting to see which of the core stories the respondents thought reflects the city of Copenhagen, even if they were not necessarily the reason why they chose Copenhagen as their travel destination.

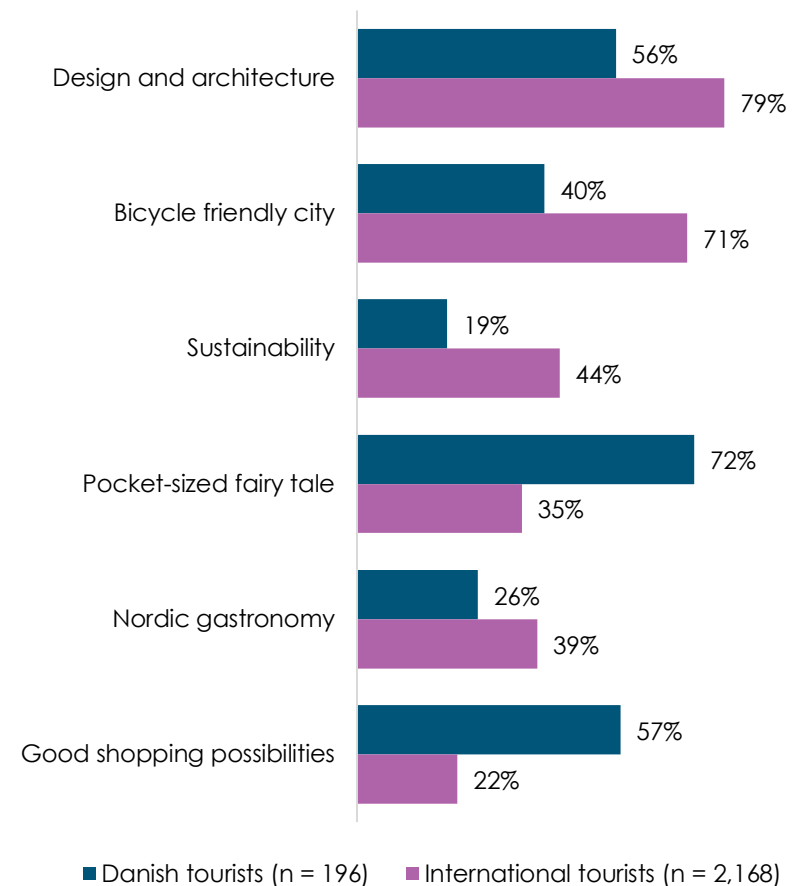
Overall, more of the respondents agreed that each of the stories accurately reflect the city than the number who said that the stories were part of their motivation for visiting the city. This is interesting because it suggests that while the stories that are being told about Copenhagen are true in the eyes of many tourists, these same stories are not necessarily what makes the majority of the tourists want to visit the city.

All of the core stories were chosen by a larger number of respondents when they were asked which stories that they recognize Copenhagen for compared to which stories that made them want to visit the city. The increase in the number of respondents who chose each of the stories in this question, compared to the previous, ranges from 11% to 53%.

A possible explanation for this difference could be that some of these stories about Copenhagen are broad and include several more specific motivations. An example of this would be the pocket-sized fairy tale, which presumably includes both the city's atmosphere, attractions, architecture, gastronomy and maybe even the city's focus on sustainability, which would mean that there is an overlap between the story about a pocket-sized fairy tale and several of the other core stories that are told about Copenhagen.

This overlap, more so than being a problem, might serve to cement these core stories in the minds of the tourists.

Recognizing Copenhagen for...



The city's atmosphere plays an important role in overall satisfaction

On average, the respondents were very satisfied with their stay in Copenhagen, as shown by their average satisfaction rating of 9 out of 10. At the end of the survey, the respondents had the option to explain the main reasons behind their satisfaction with the city as a travel destination. The word cloud bellows shows the top 25 most used descriptive words from these descriptions:



Interestingly, many of the mentioned aspects of the city could be considered a part of what makes up the city's atmosphere, which 65% of respondents chose as a motivation for choosing Copenhagen as their travel destination. Attractions and architecture, which were the second and third most chosen travel motivation are also included in this top 25.

The quotes to the right highlight some of the more detailed answers given by the respondents:

"A beautiful, clean and peaceful city with amazing attractions (especially for children)"

"A comfortable place to visit because English widely spoken, people friendly and easy to navigate around."

"Everything was great but it is an expensive destination due to currency exchange. Especially for Canadians!"

"A lot of museums / architecture etc. Way more than in other cities and all more [or] less in walking distance"

"Bicycle friendly, public transportation was easy, people were friendly, appreciated being able to use card to get to and from airport"

"Charming city, lovely people, environmentally attractive, walkable, not TOO big, relaxing"

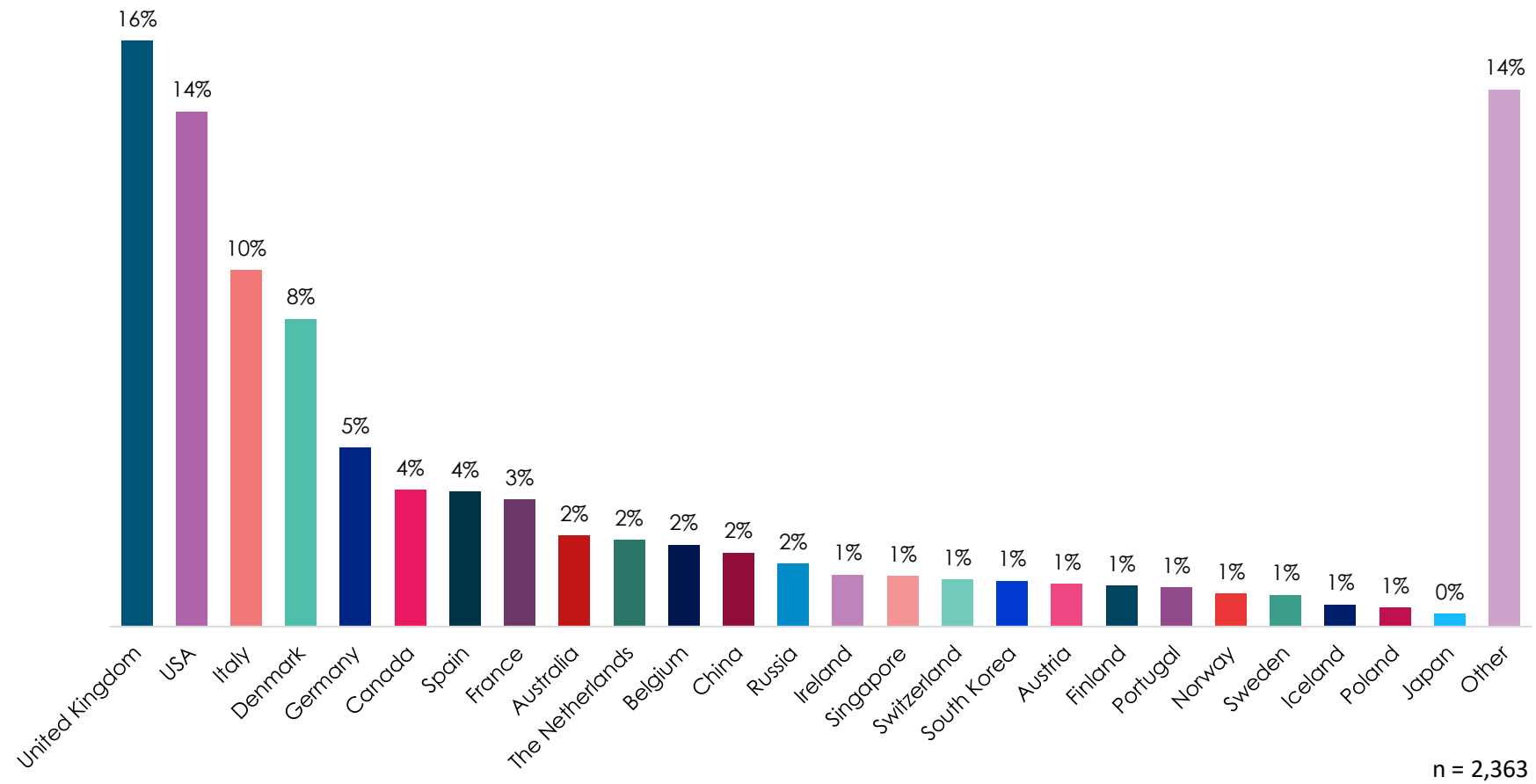
"A great city, but surprisingly expensive."

"We had a fantastic holiday. Good size to walk everywhere. Interesting and beautiful attractions. Great food, fantastic playgrounds, amazing castles, loved the architecture and the different atmosphere in different parts of the city. Wonderful."

"Very happy with my experience, but recognise I was very lucky with weather. A rainy or cold four days would have been less enjoyable."

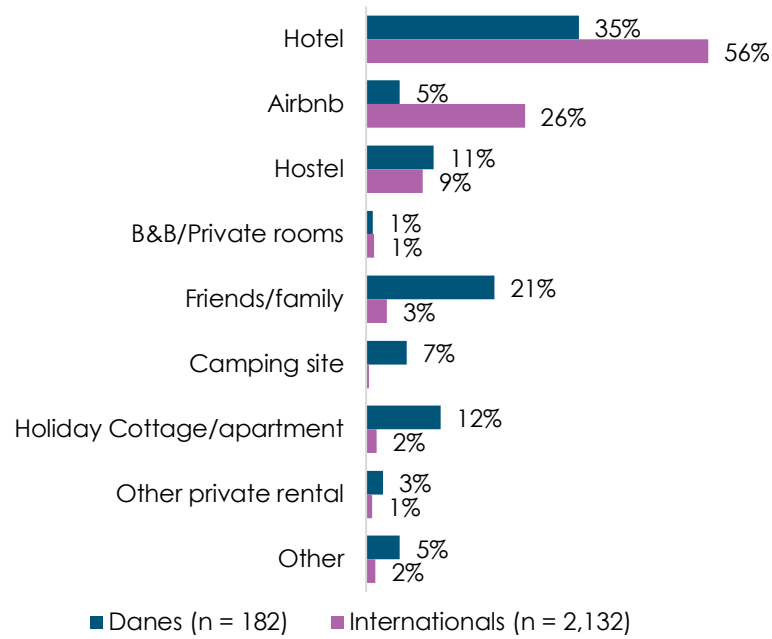
Main appendix

Nationality

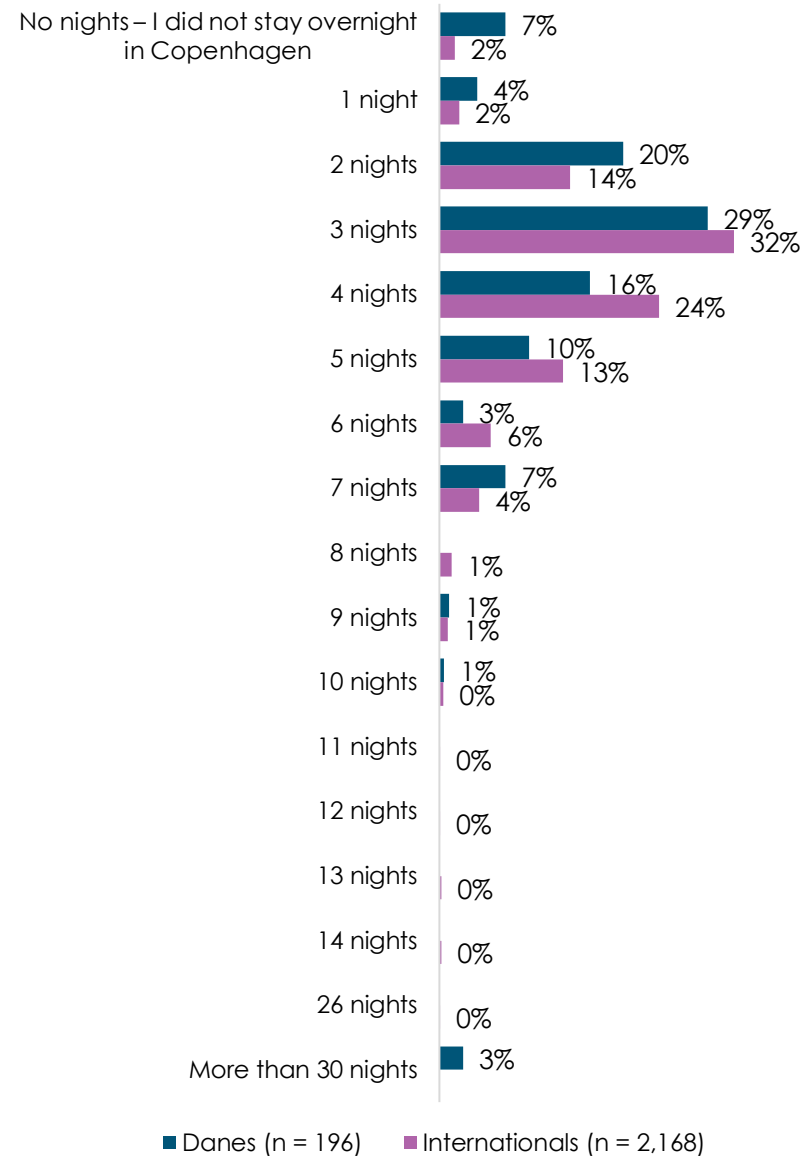


n = 2,363

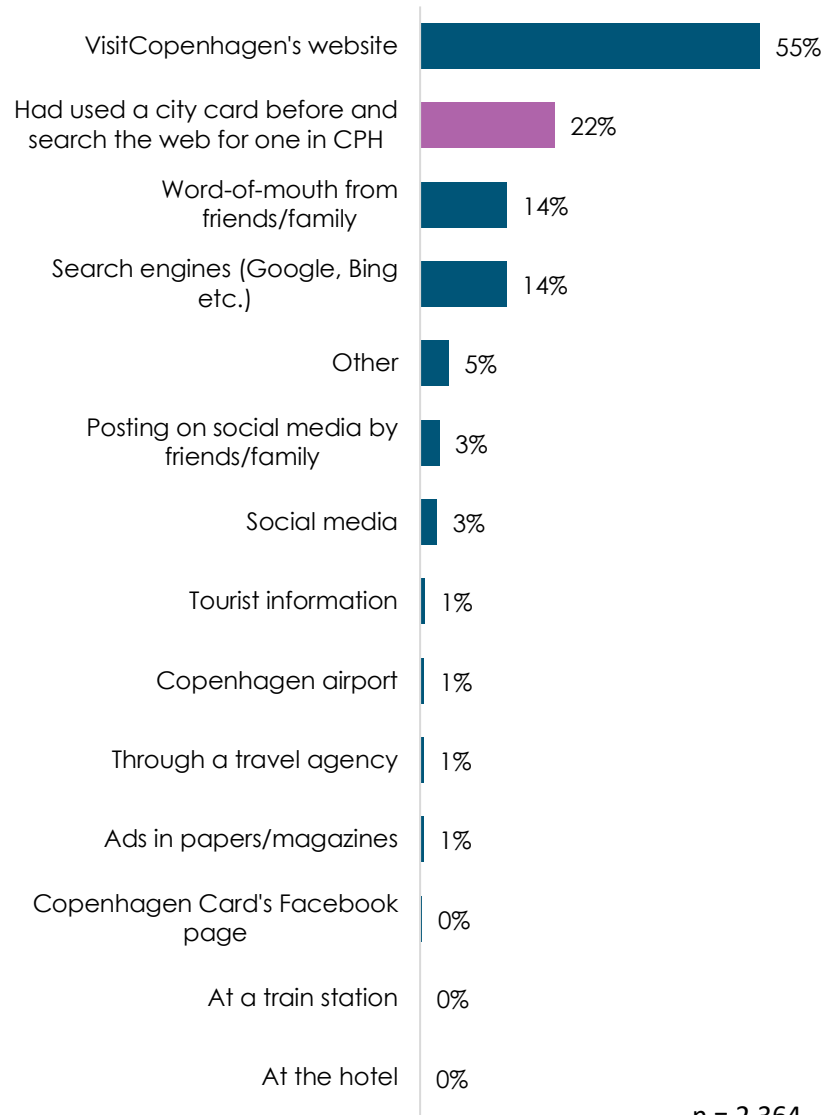
Choice of accommodation



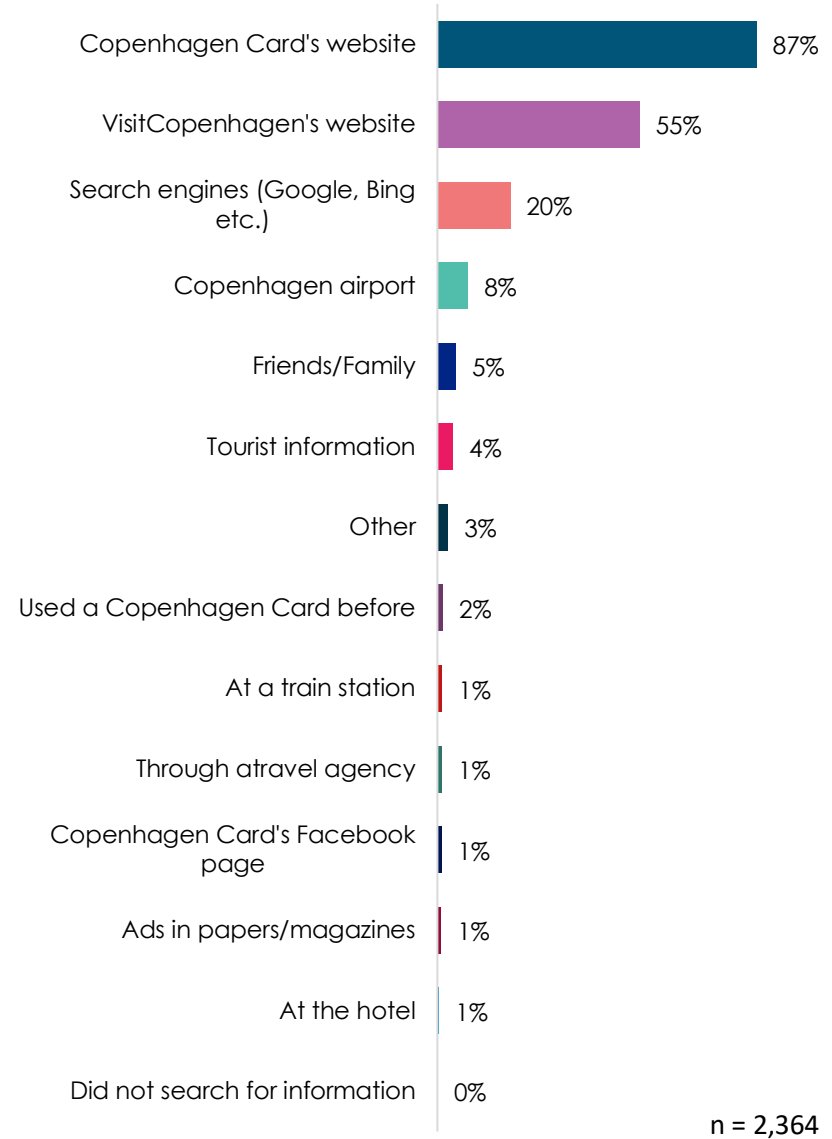
Number of bed nights



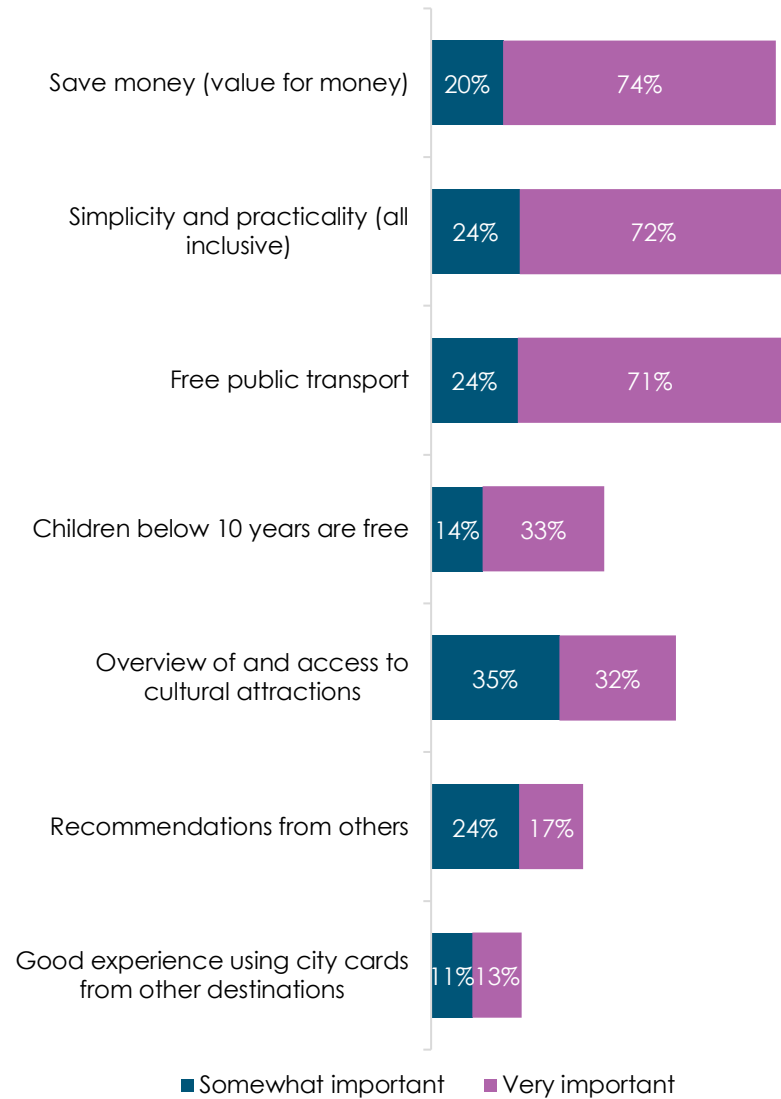
Hear about the CPH Card from...



Found additional information about the CPH Card from...

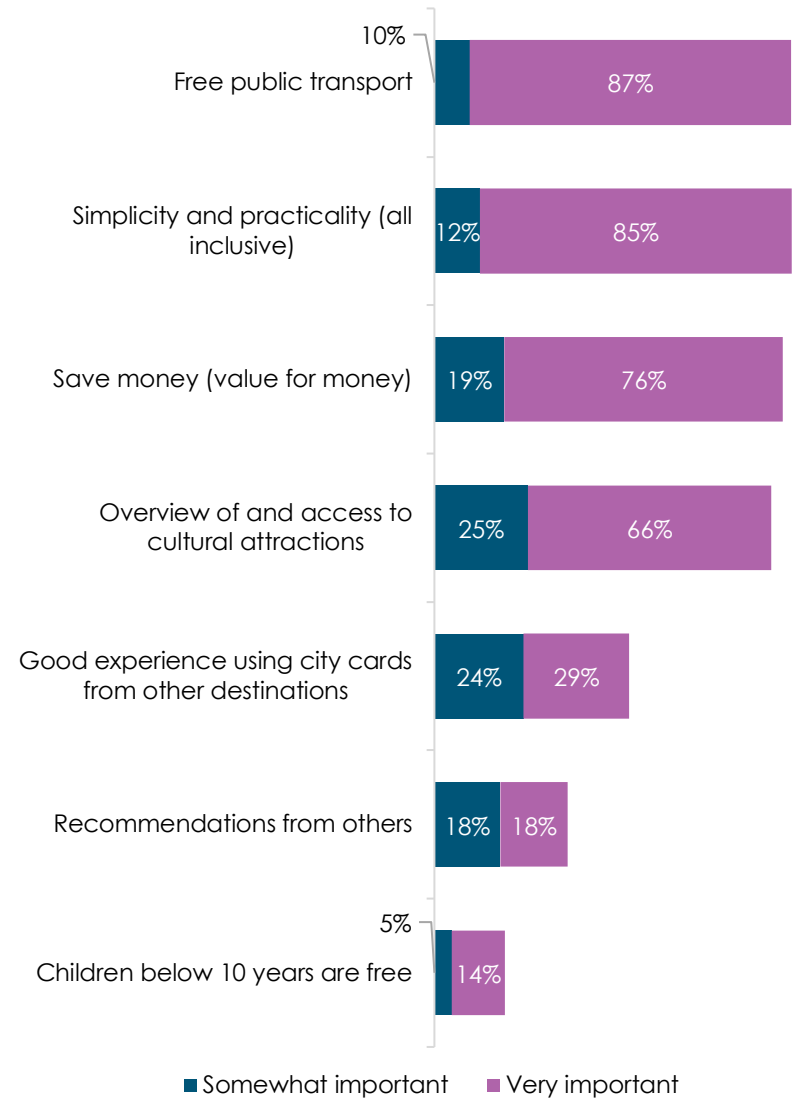


Danish respondents' decision to buy a CPH Card



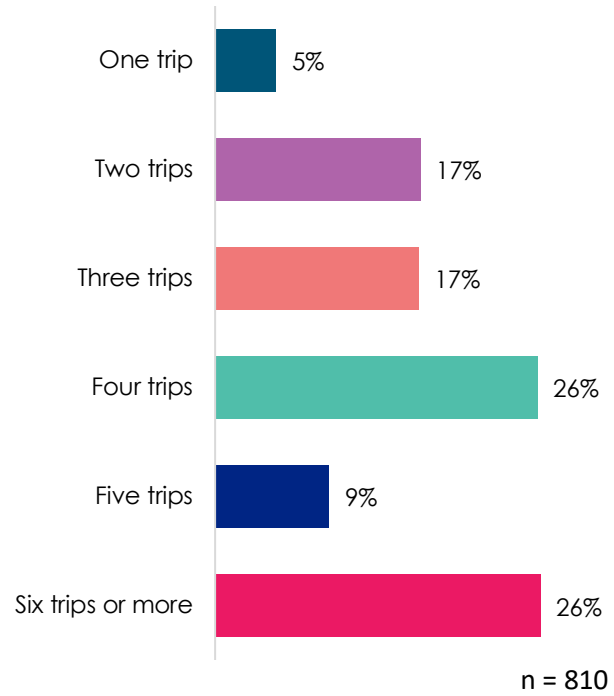
n = 134-196

International respondents' decision to buy a CPH Card

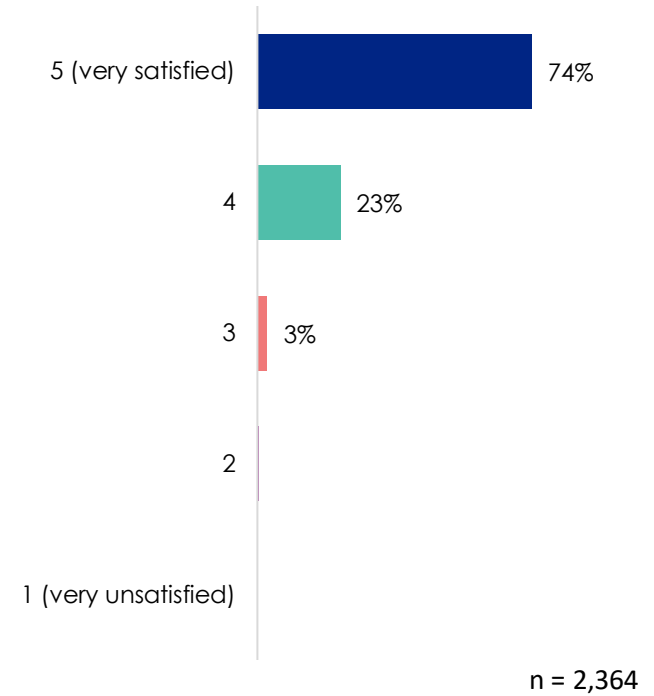


n = 1,786-2,156

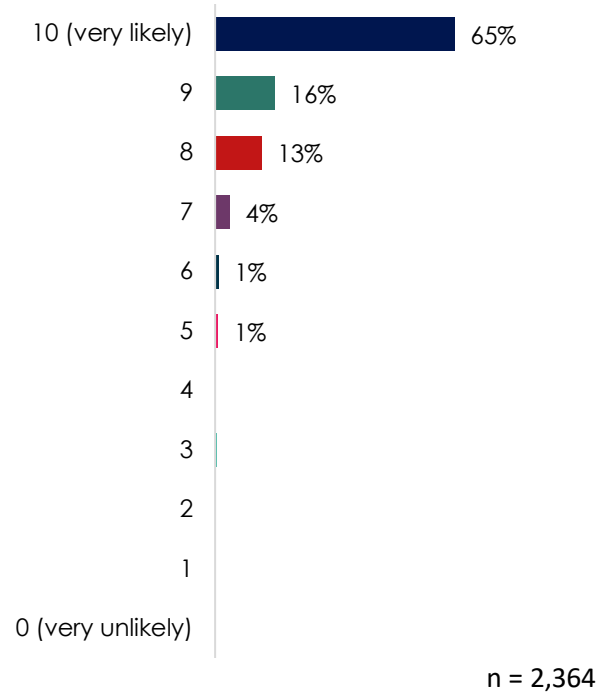
Daily use of public transportation using the CPH Card



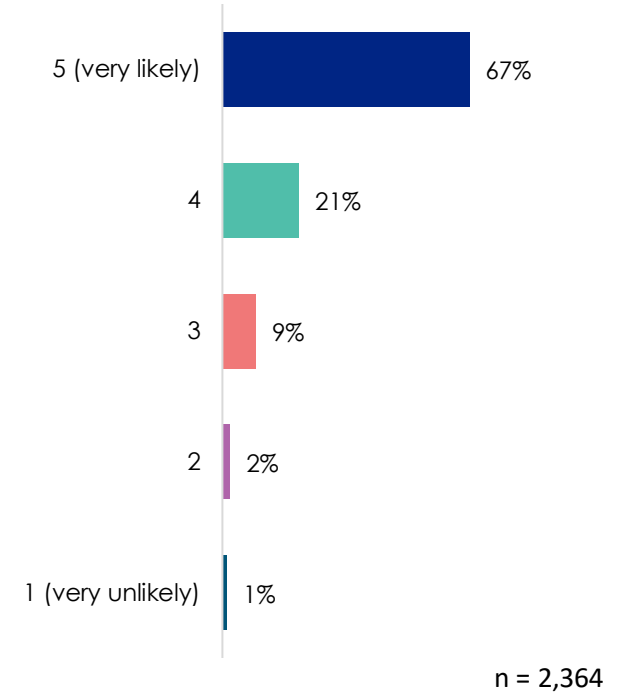
Satisfaction with the CPH Card



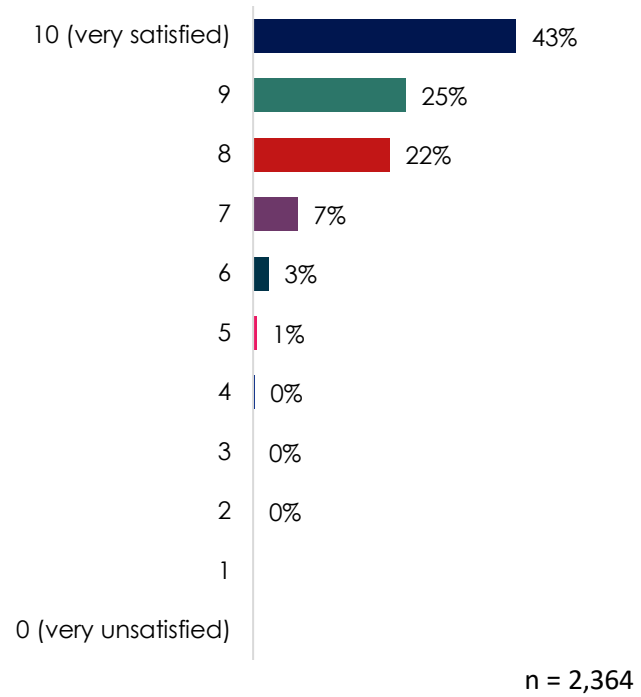
Willingness to recommend the CPH Card



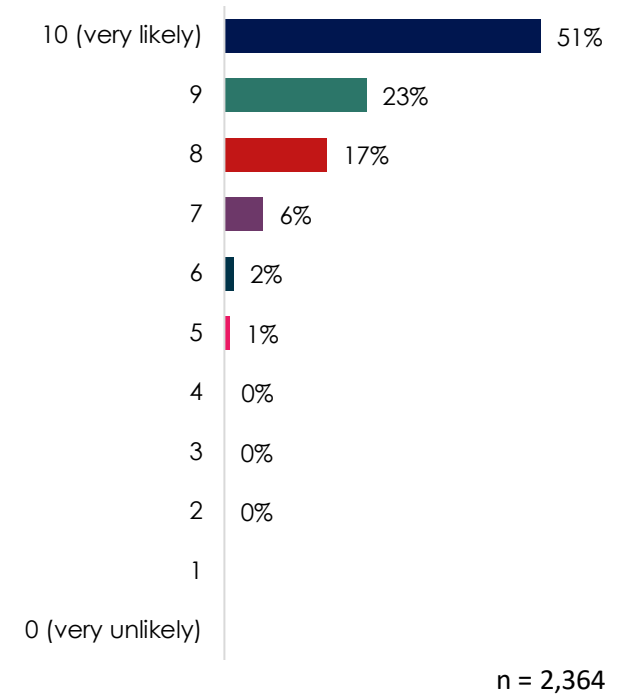
Willingness to buy again, if they return to Copenhagen



Satisfaction with Copenhagen as a travel destination

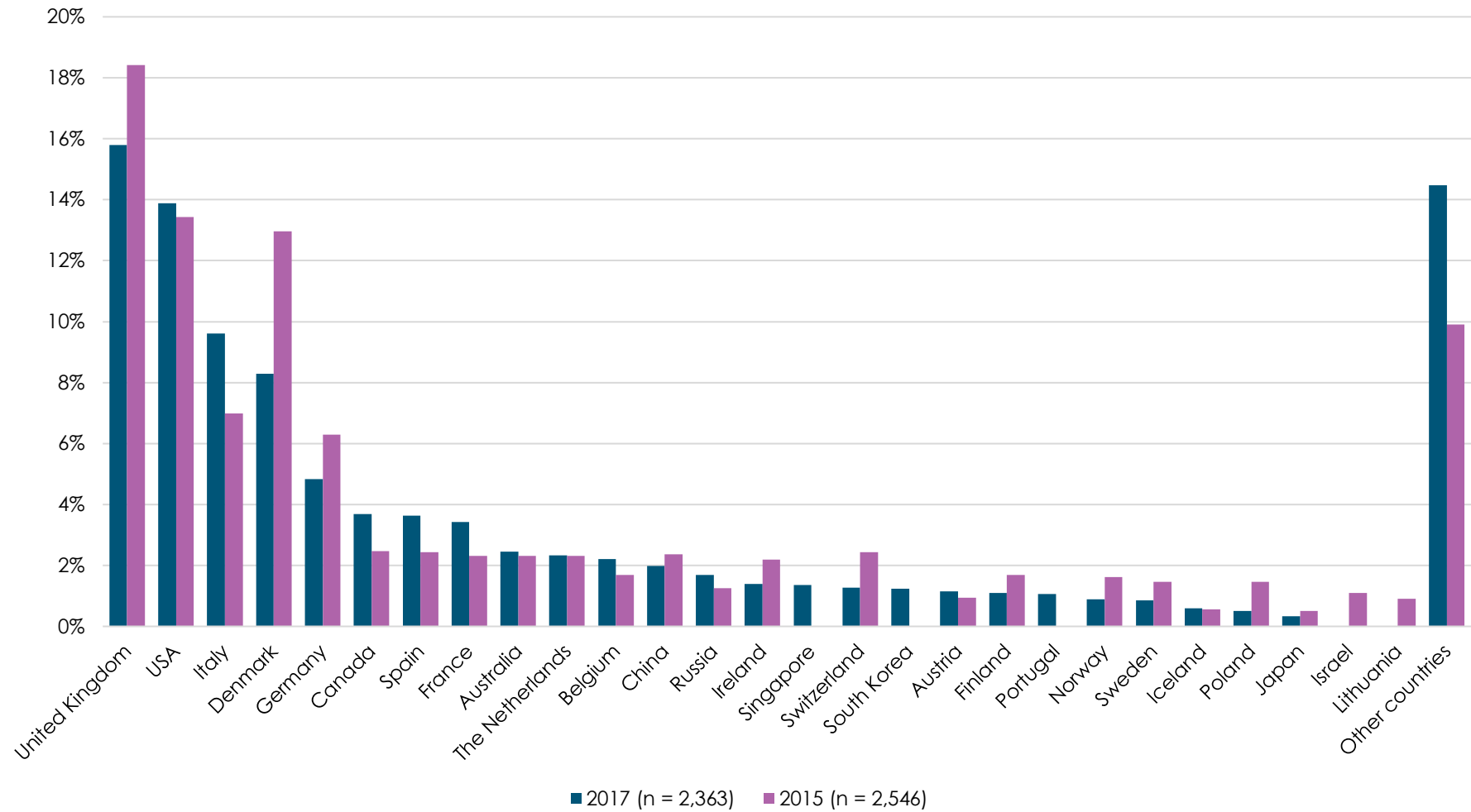


Willingness to recommend Copenhagen as a travel destination

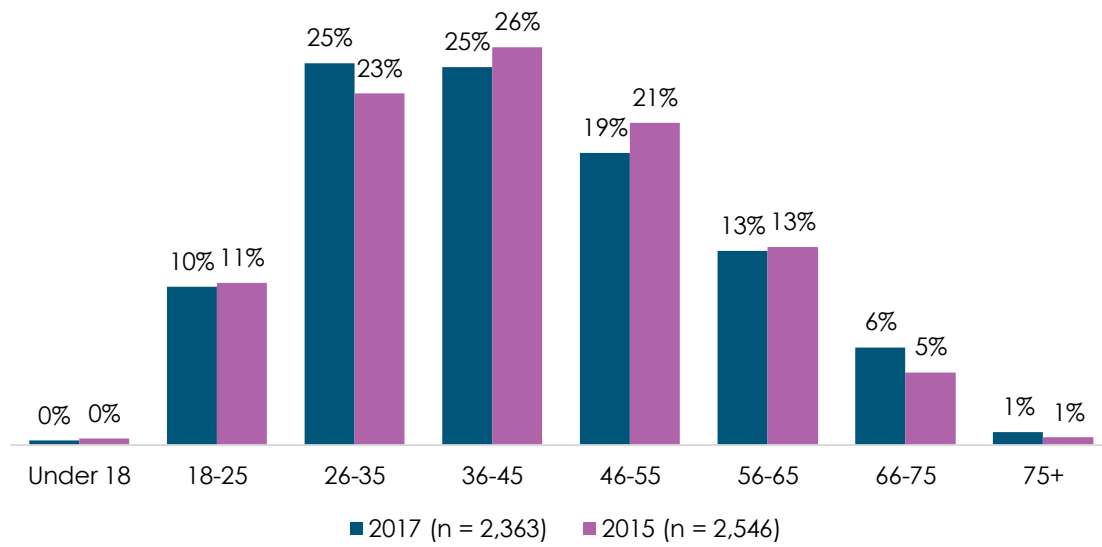


Limitations appendix

Nationality



Age



COPENHAGENCARD

For inquiries about this report please contact Analyst Mike Wedel Hansen at mha@woco.dk

