



Visitor Satisfaction in Copenhagen

A COMPETITIVE ANALYSIS



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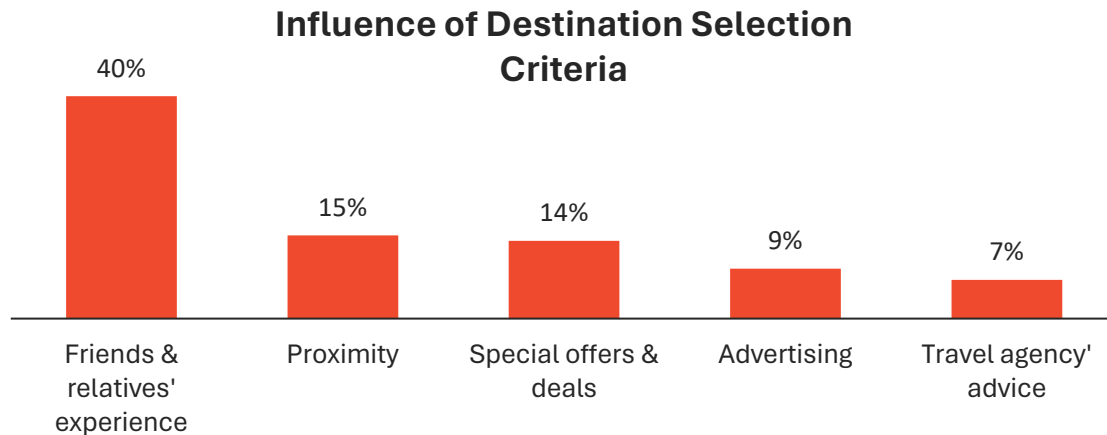
THE COMPETITIVE POSITION OF COPENHAGEN



Forewords

WHY MEASURING VISITOR SATISFACTION MATTERS

Visitor experience is the #1 factor influencing travelers' choices



Source: TRAVELSAT® - Visitors to Copenhagen & Competition

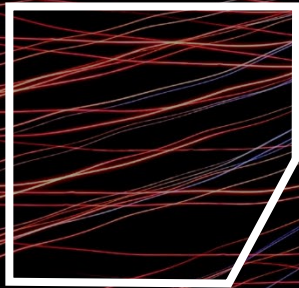
The TRAVELSAT® Competitive Index is **recognized worldwide** as an **independent benchmark to gauge the competitiveness of destinations** based on visitor experience ratings.

Awarded the Ulysses Prize by the UNWTO in 2011 for its excellence and innovation in improving destination governance, TRAVELSAT® has since been utilized by over 150 destinations and tourism stakeholders globally. It has been established as **the most extensive solution for analyzing visitor satisfaction**.

Objectives: Copenhagen has clearly set the ambition to place the visitor experience competitiveness at the core of its development strategy

The challenge of meeting guests' expectations has massively developed in many destinations and in this context, the following KPIs have been set:

- In 2023, **international tourists' satisfaction** with their stay must be on the **same level with or better than the average** among Copenhagen's most important international competitor cities.
- In 2025, **Copenhagen must be No. 1** compared to its most important competitors in terms of international tourists' assessment of the destination as an **environmentally friendly travel destination**.
- **Cultural offerings** in the capital must be **in the top 3 for international guests** compared to the most important international competitor cities (in 2030).



TRAVELSAT[®] Methodology

MEASURING VISITOR SATISFACTION & COMPETITIVE PERFORMANCE



The TRAVELSAT[®] Survey

COMPETITIVE INDEXES COVERING ALL ASPECTS OF THE VISITOR EXPERIENCE

Overall experience (KPIs)

- Overall expectations fulfillment
- Intention to recommend (Net Promoter Score)
- Intention to repeat visit
- Overall value for money of the stay

Accommodation

- Overall quality
- Hospitality of personnel
- Value for money

Local food

- Overall quality
- Diversity & choice
- Hospitality of restaurant personnel
- Value for money

Historical heritage (monuments, museums...)

- Diversity and range of historic sites and monuments
- Management & maintenance of historic sites and museums
- Hospitality at historic sites and museums
- Entrance fees for historic sites and museums
- Convenience of visiting, crowd

Transportation

- Cost of transport to reach the destination
- Accessibility of public transport (bus, metro...)
- Hospitality of personnel in public transport
- Price of public transport
- Hospitality at entry point
- Taxi service
- Parking convenience
- Transportation infrastructure (roads...)
- Access to/from the airport
- Signposting & ease of finding your way around

Culture and leisure

- Diversity & range of leisure and cultural activities
- Theater, opera, cultural shows
- Amusement & theme parks
- Price of leisure activities
- Guided tours
- Nightlife (bars, nightclubs...)

Shopping

- Range of shopping possibilities
- Value for money
- Hospitality of personnel in shops
- Opening hours & days
- Quality of handicrafts

Tourist information centers

- Number of information centers available
- Efficiency of personnel
- Opening hours & day

Environment

- Beauty of landscapes
- Cleanliness of public areas
- Cleanliness outside cities
- Architecture and urban development
- Efforts to protect the environment

Local people hospitality & safety feeling

- Hospitality of local inhabitants
- Ease of communication with local people
- Safety, feeling of security

Transverse indexes (average for all related criteria)

- Sustainability
- Diversity of things to see, to do, to shop, to visit...
- Human hospitality chain
- Price & value for money chain

Drivers of Visitor Satisfaction

THE RELATIONSHIP BETWEEN TOURISM PRODUCTS & CONTEXTUAL FACTORS

A holistic approach to visitor experience

Visitor satisfaction at the destination level is influenced both by **tourism product quality perception** yet is **increasingly also influenced by intangible “contextual factors”**. Such examples include experiences that visitors do not need to pay for, such as **resident attitudes towards tourism**, the **feeling of safety**, factors tied to **cleanliness**, **convenience for visiting**, and **ease of orientation**.

Key Factors

Greatly influence both satisfaction and dissatisfaction

- Locals' hospitality
- Safety feeling
- Convenience for visiting, crowds
- Ease of orientation, mobility
- Cleanliness

Basic Expectations

Greatly impact on dissatisfaction if negative

- Accommodation experience
- Food experience
- Cultural and leisure diversity
- Shopping diversity
- Public transport access
- Airport access

Differentiators

Factors that can make a difference for some visitors

- Nightlife, festivals
- Handicraft & souvenirs
- Tourist information centers
- Taxi services
- Amusement / Theme parks

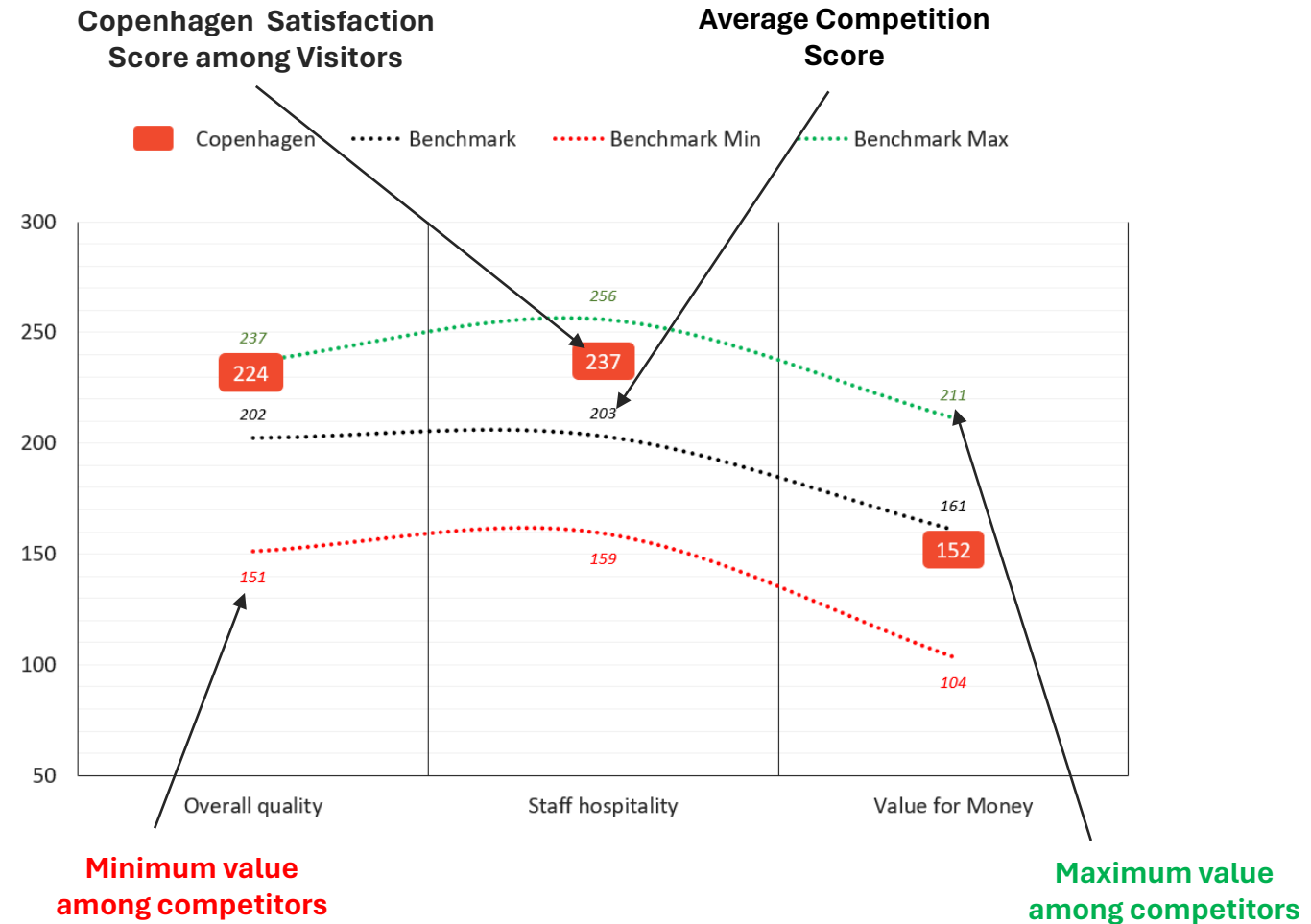
Source: TRAVELSAT® Correlation Analysis to the overall Satisfaction – Llosa Matrix / 2023 (Cities, all markets)

TRAVELSAT[®] Index Definition

THE BENCHMARKING METHODOLOGY

How to interpret TRAVELSAT[®] Indexes

- The TRAVELSAT[®] Competitive Index applies a **standard proprietary scoring scale** from 1 to 10.
- The index reflects the level of satisfaction for each rated criterion, and **typically fluctuates from -50 to 400**.
- Scores from extremely satisfied or dissatisfied visitors, being **more likely to greatly influence the destination reputation**, are **weighted more highly in comparison to arithmetic averages** in order to **take into consideration their higher reputation impact**.
- The main function of indexes is to **benchmark a destinations' experience quality to that of the average competition**.



Note: A difference of 10 points between two indexes is statistically significant.

Sample Profile

PROFILE OF RESPONDENTS HAVING TRAVELLED TO COPENHAGEN



Total

- **513** interviews



Gender

- **Female:** 48%
- **Male:** 52%

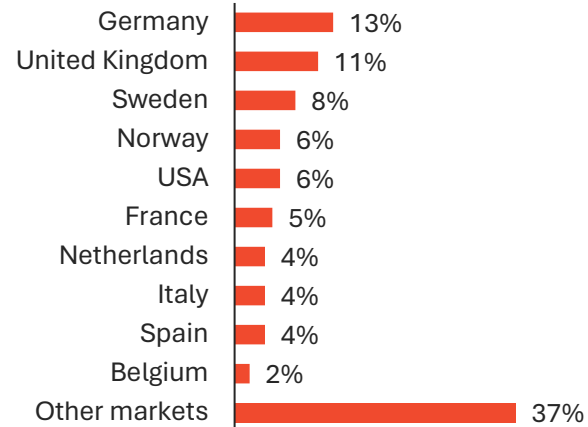


Age

- **18-34 years:** 24%
- **35-49 years:** 32%
- **50+ years:** 45%



Markets



Benchmark

- Indexes are compared to average, minimum and maximum values in: **Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm and Brussels**
- **N=2000+** observations during the same period

Period of analysis: The data reflected has been collected throughout the year 2023.

Note: TRAVELSAT® Index calculations take into account the markets' profile based on statistics of bednights





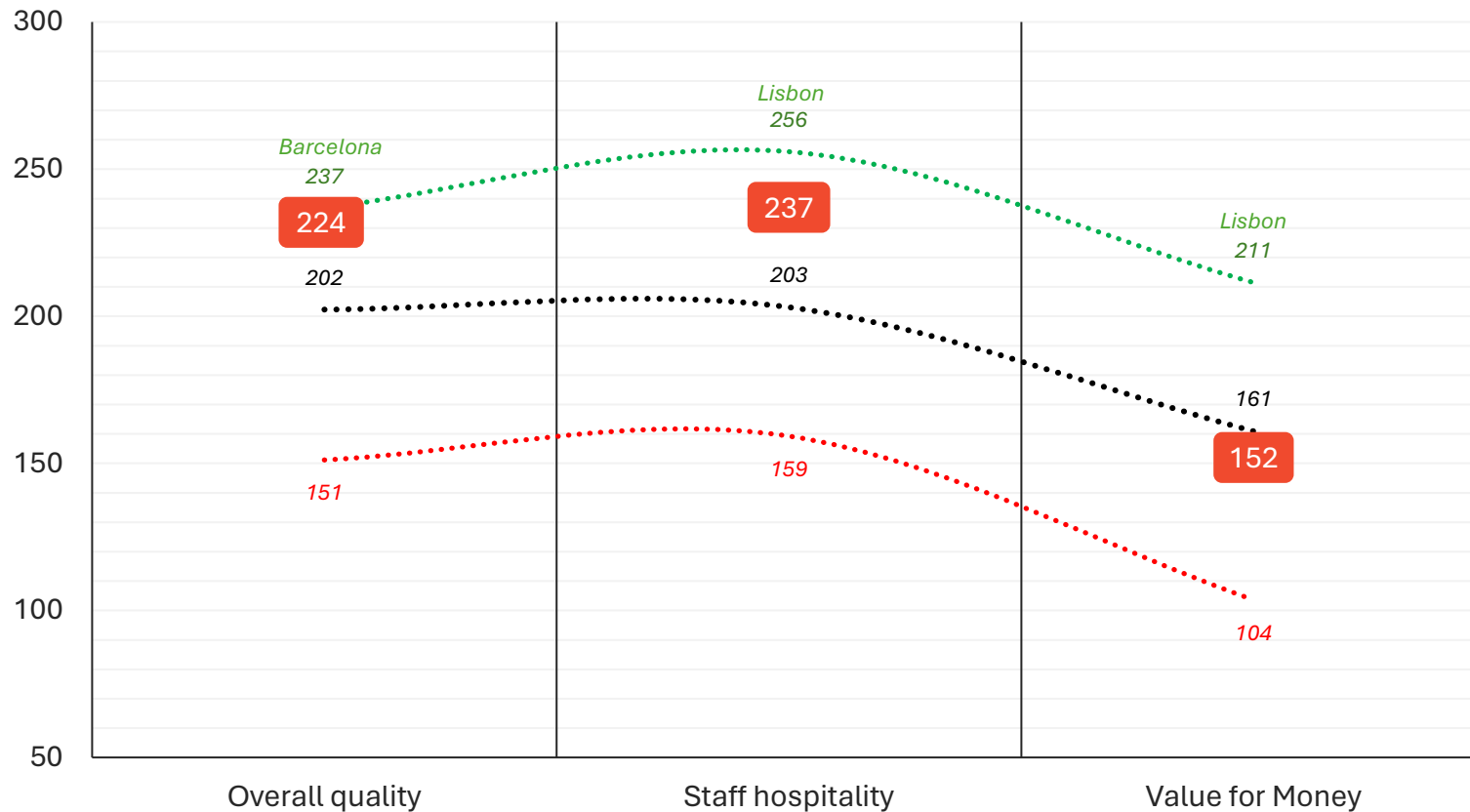
Detailed Satisfaction Scores

EVALUATING THE VISITOR JOURNEY

Accommodation Experience

COMPETITIVE ANALYSIS

■ Copenhagen
 ●●●● Benchmark
 ●●●● Benchmark Min
 ●●●● Benchmark Max

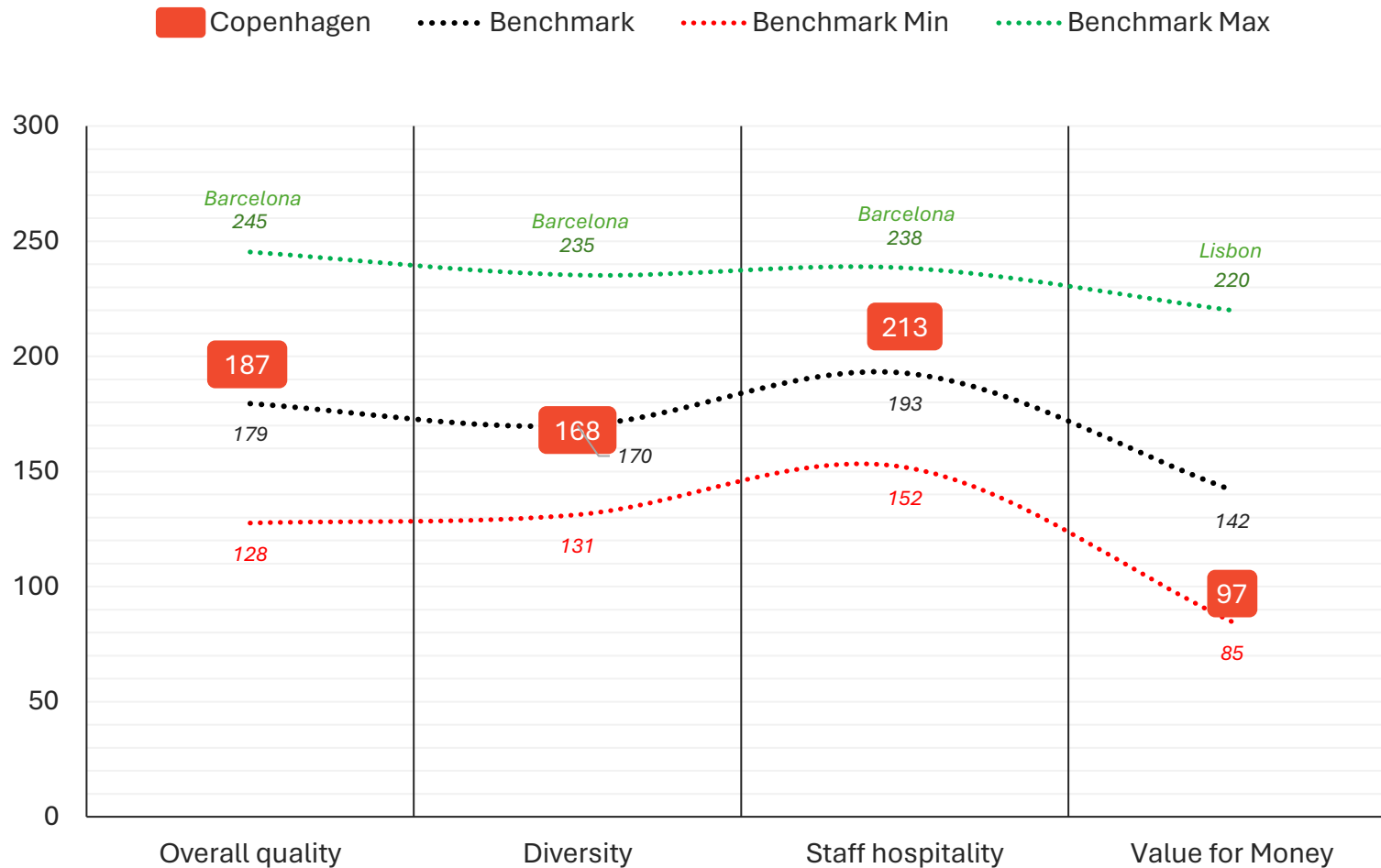


- Copenhagen offers an overall lodging experience that is of a high and competitive standard compared to norms.
- The hospitality provided by the staff is notably commendable and exceeds competition on average.
- Nonetheless, the premium pricing poses a challenge in cultivating a perception of value for money among visitors.

Period of analysis: The data reflected has been collected throughout the year 2023.

Food Experience

COMPETITIVE ANALYSIS

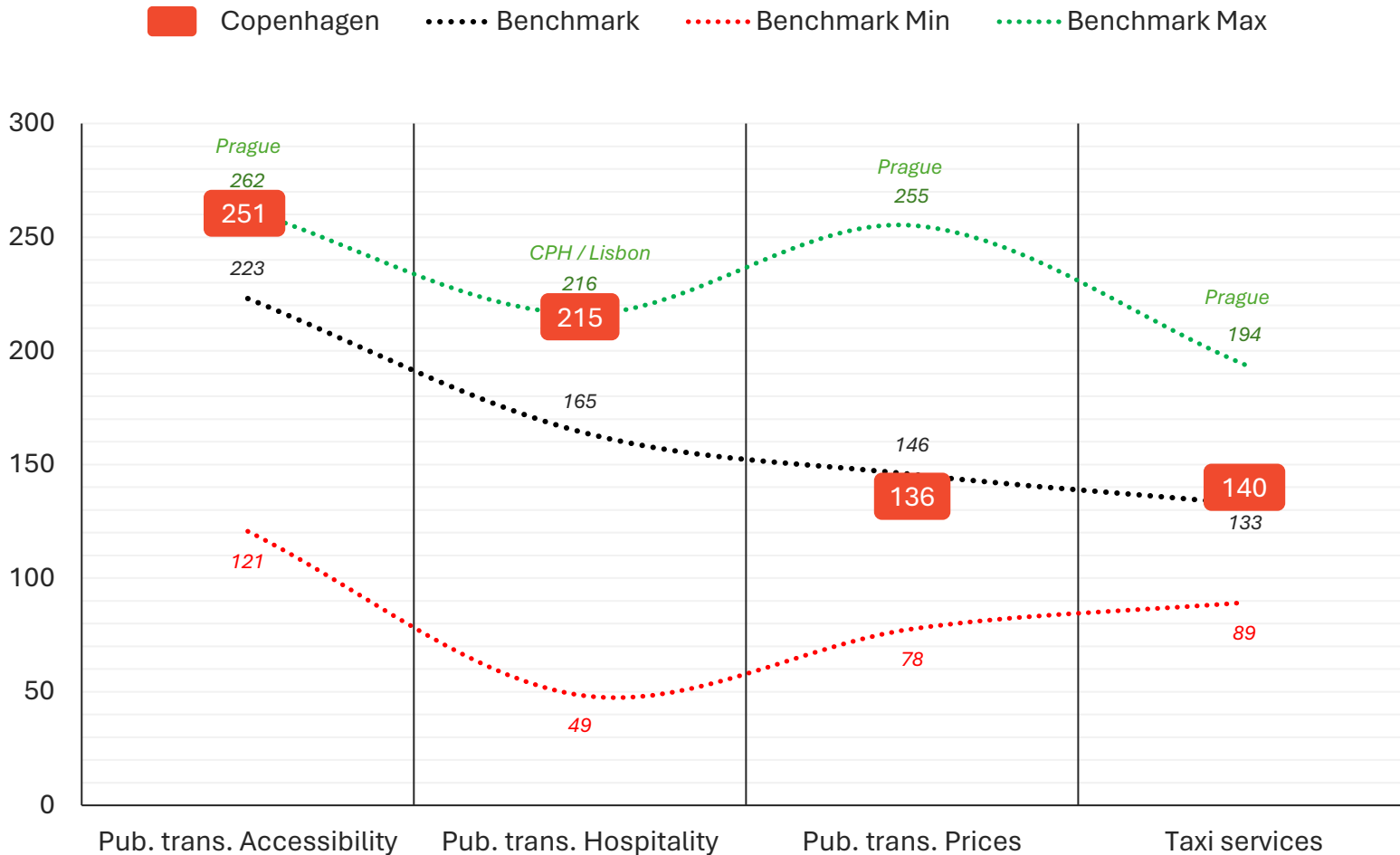


- Food experiences have garnered satisfaction levels that match competitive standards, both in terms of quality and the variety of options available.
- The level of hospitality demonstrated by restaurant staff has received ratings that surpass the competitive average, leaving a notably positive impression in the hospitality industry, including hotels and restaurants.
- In a similar vein to the lodging industry and due to inherent prices, there is a discernible competitive shortfall when it comes to the perceived value for money of the food offerings.

Period of analysis: The data reflected has been collected throughout the year 2023.

Public Transport & Taxis

COMPETITIVE ANALYSIS

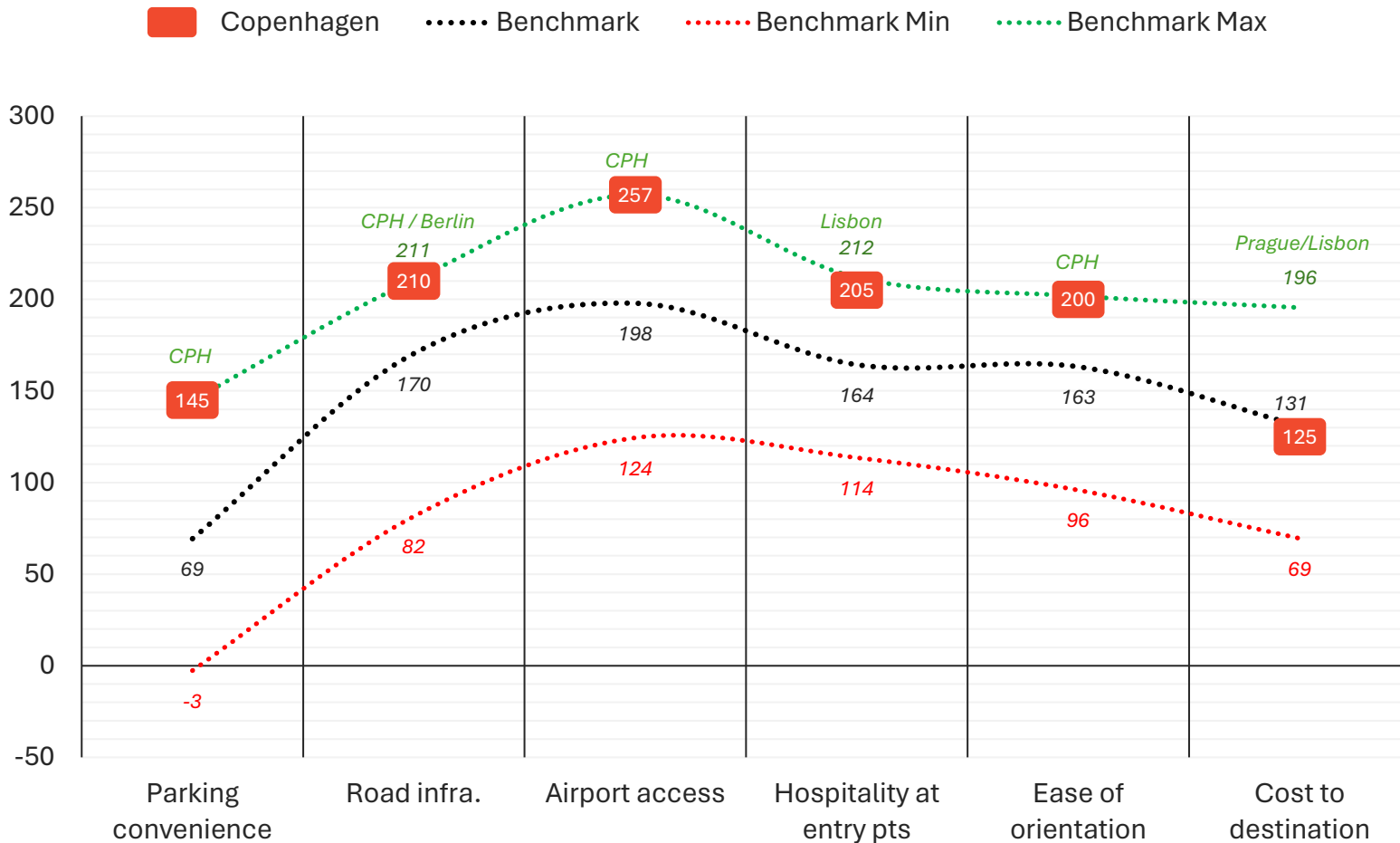


- Copenhagen is recognized for its superior public transport system, notably excelling in both accessibility and the welcoming nature of the service.
- The pricing for public transport is considered competitive, aligning with the average market rates.
- Satisfaction with taxi services is on par with standard levels observed in other cities on average.

Period of analysis: The data reflected has been collected throughout the year 2023.

Other Mobility-related Experiences

COMPETITIVE ANALYSIS

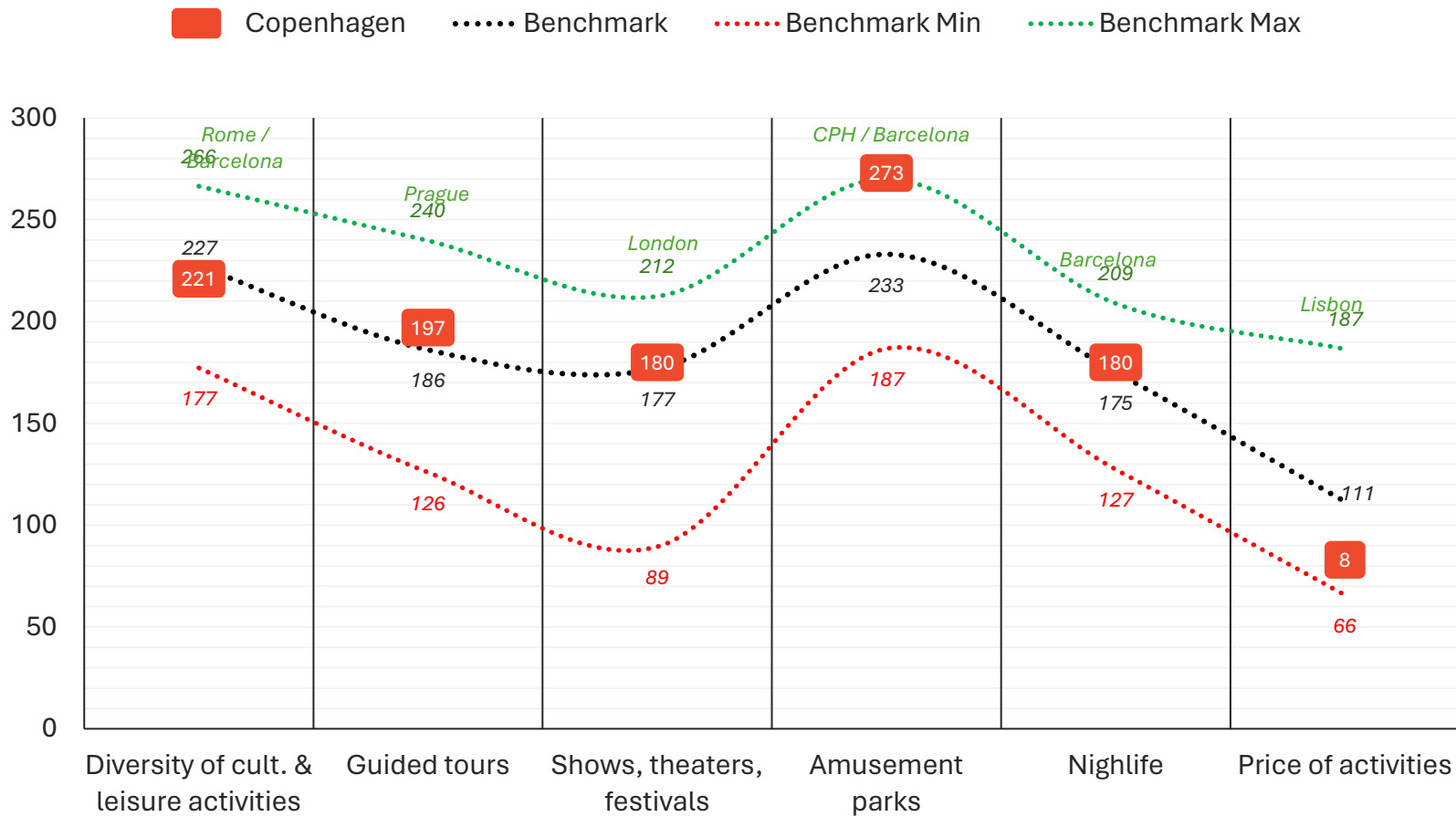


- Copenhagen distinguishes itself as a travel destination with its competitive advantage in the ease of mobility across various transportation modes.
- This aspect is particularly noteworthy for those on short city breaks where efficient time management is crucial for city exploration.
- When compared to other destinations frequently served by budget carriers, the cost of reaching Copenhagen is assessed to be reasonable and on par with expectations.

Period of analysis: The data reflected has been collected throughout the year 2023.

Culture & Leisure

COMPETITIVE ANALYSIS

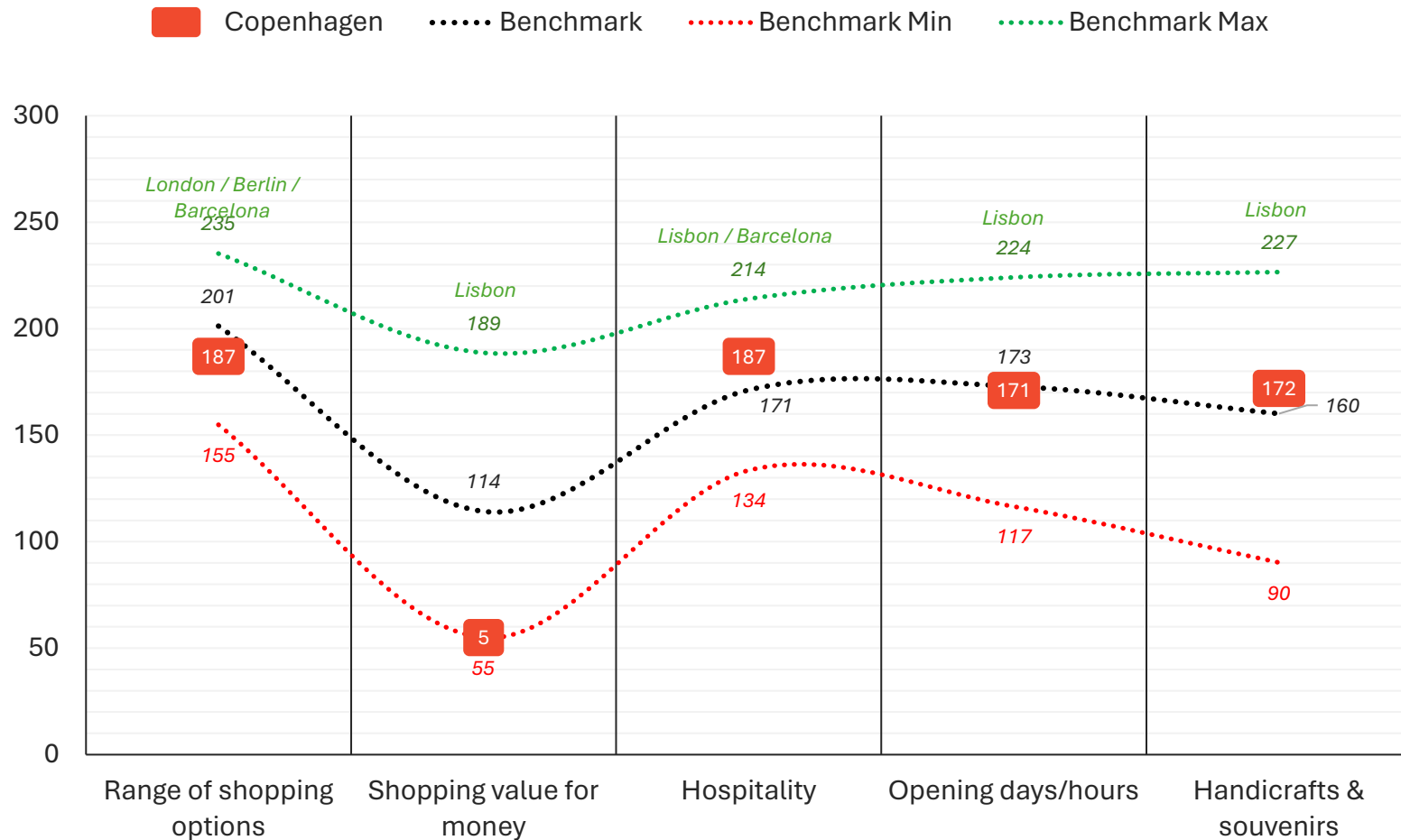


- Overall, visitor experiences with cultural and leisure activities are considered on par with what is typically expected from similar destinations.
- A unique competitive edge has been noted in the area of amusement parks, likely influenced by the renowned Tivoli Gardens.
- The cost associated with these activities, however, often receives negative feedback, a sentiment commonly echoed across other Nordic and UK destinations.
- Barcelona continues to be a formidable rival, consistently celebrated for its vibrant diversity and perennial sense of enjoyment.

Period of analysis: The data reflected has been collected throughout the year 2023.

Shopping

COMPETITIVE ANALYSIS

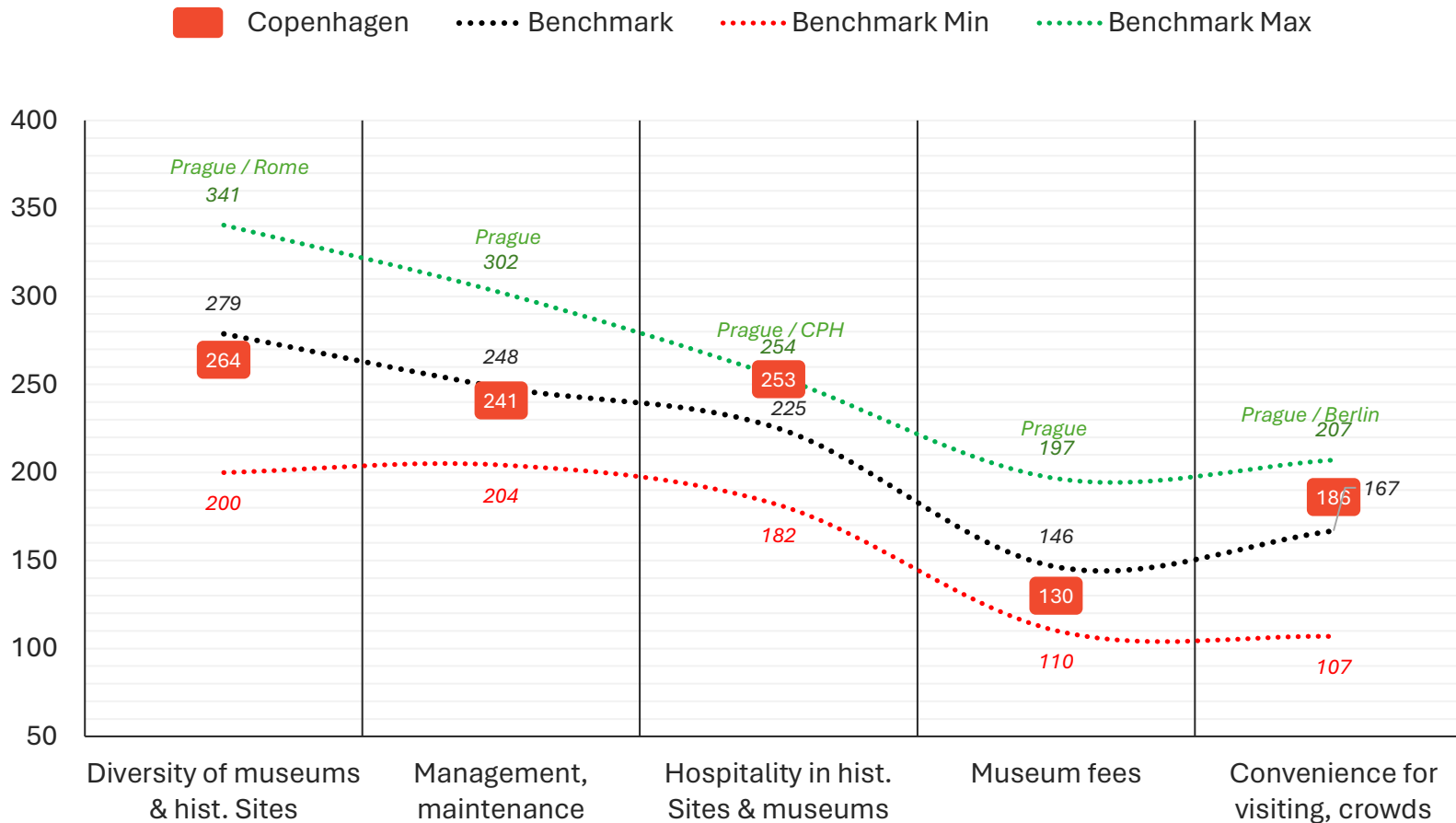


- While the shopping experience offers commendable competitiveness in terms of variety, store hours, customer service, and souvenir selection, it is often perceived as quite costly for international visitors.
- In particular, matching the appeal of Southern and Mediterranean cities such as Lisbon or Barcelona presents a significant challenge due to their strong market position on this facet of the experience.

Period of analysis: The data reflected has been collected throughout the year 2023.

Historical Heritage

COMPETITIVE ANALYSIS



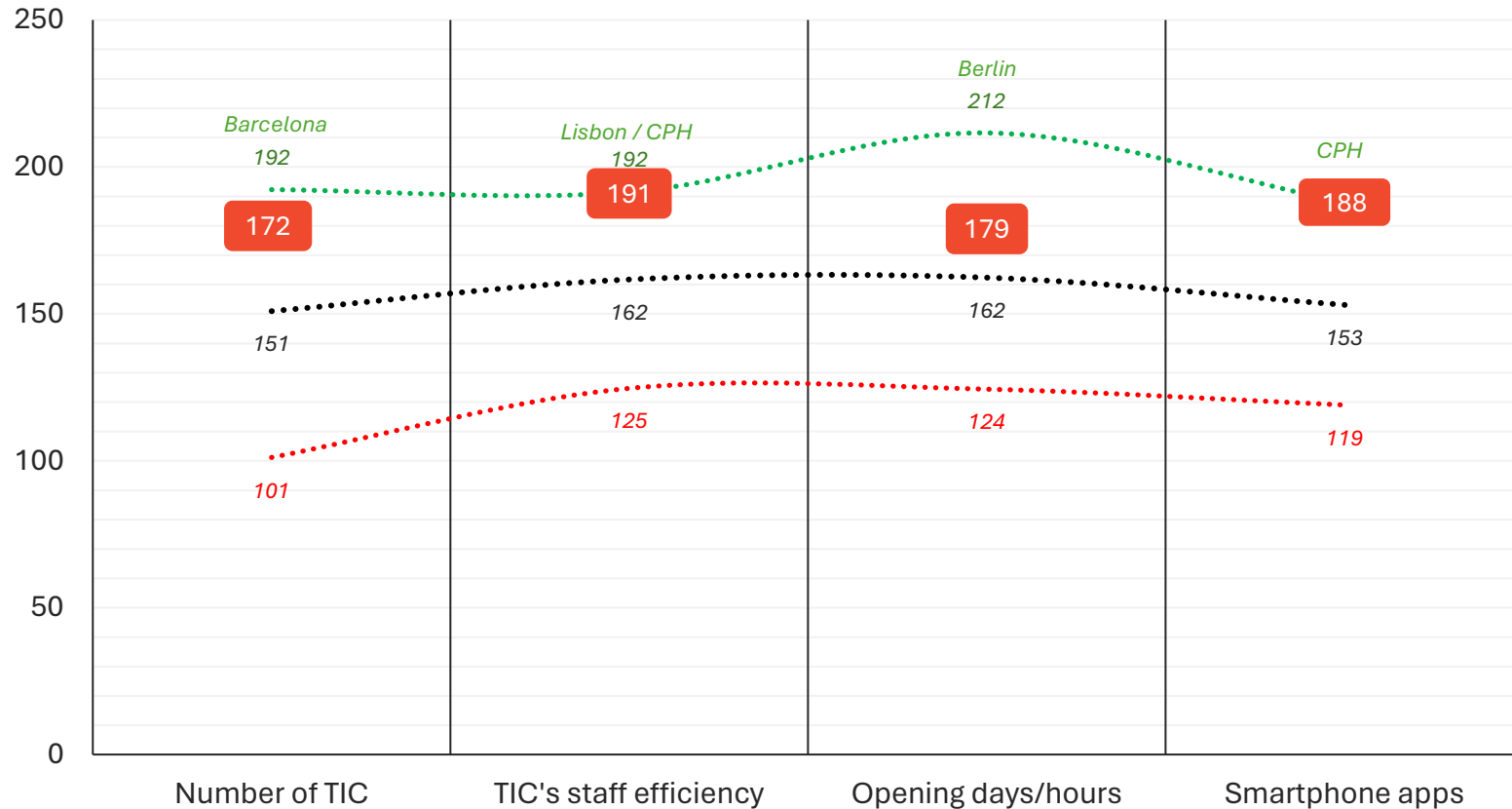
- Visitor satisfaction with museums and historic sites generally aligns with the expected standards, although there are slight discrepancies regarding diversity and fee perceptions.
- The warmth and hospitality extended by staff at these sites are highly valued by visitors, and feelings about site congestion, an important consideration in the post-Covid era, are predominantly positive.
- Prague is often considered to deliver a superior experience in many aspects of its historical and cultural heritage offerings

Period of analysis: The data reflected has been collected throughout the year 2023.

Tourist Information Centers

COMPETITIVE ANALYSIS

■ Copenhagen
 ●●●● Benchmark
 ●●●● Benchmark Min
 ●●●● Benchmark Max

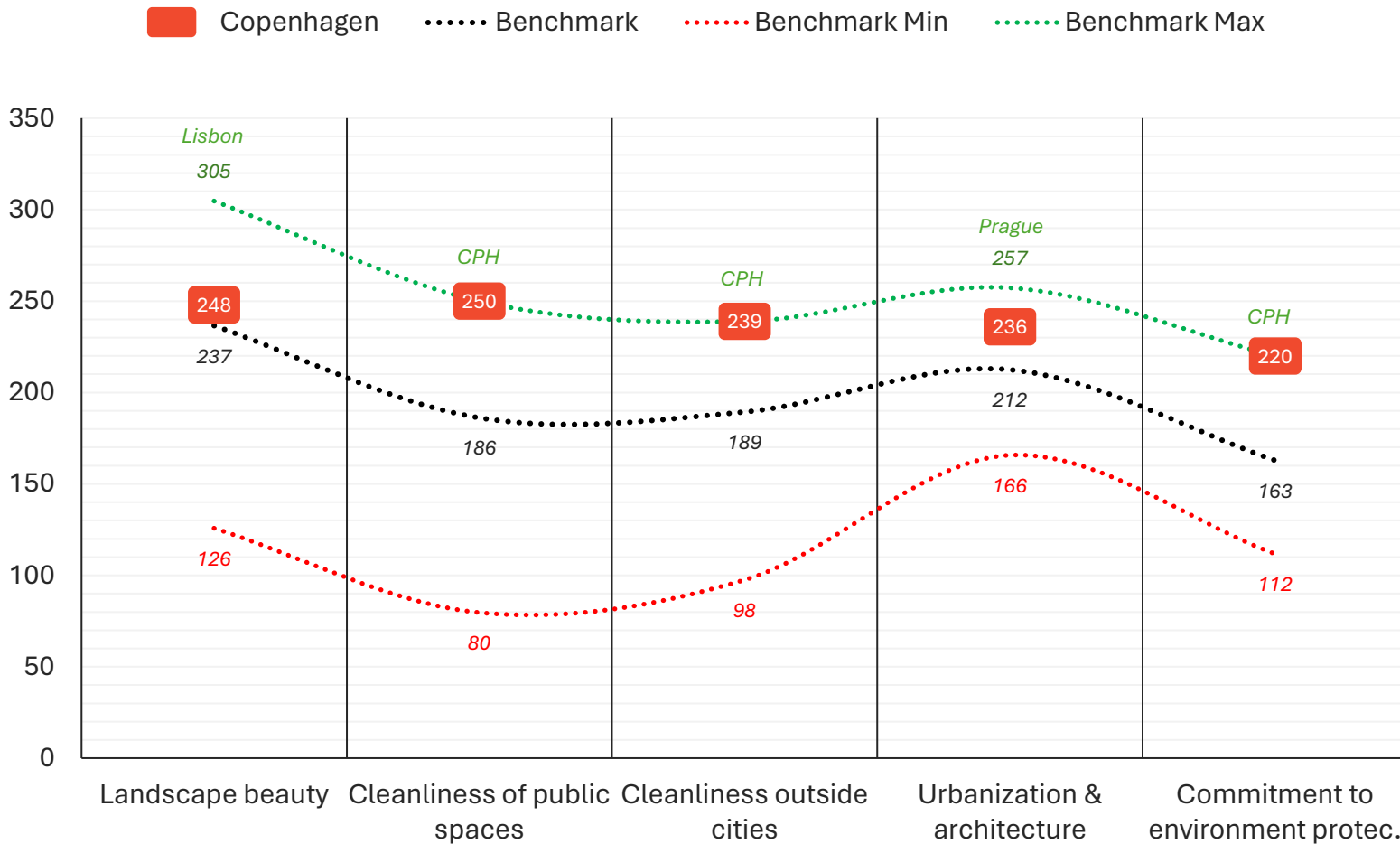


- Copenhagen stands out for its exceptional and highly competitive visitor support services.
- Visitors benefit from effective guidance, available through both physical information centers and digital platforms offering hospitality services

Period of analysis: The data reflected has been collected throughout the year 2023.

Environment

COMPETITIVE ANALYSIS



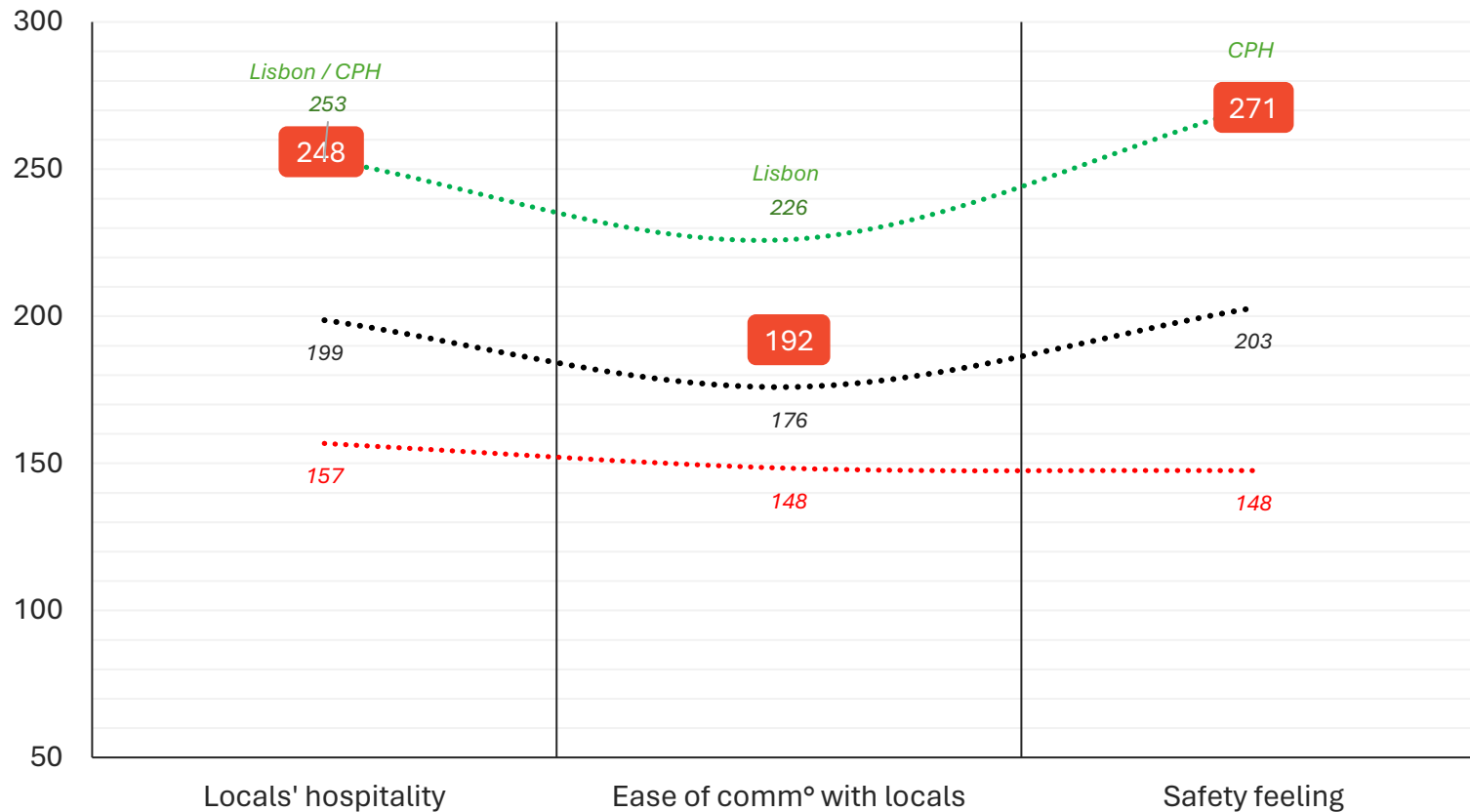
- In assessing the environmental aspects of the visitor experience, Copenhagen distinguishes itself significantly from its competitors.
- The city is particularly acclaimed for its cleanliness and its dedication to environmental conservation.
- Such elements are essential to fostering a positive perception of quality, safety, and sustainability, especially in the context of the post-Covid era.

Period of analysis: The data reflected has been collected throughout the year 2023.

Local Hospitality & Safety Feeling

COMPETITIVE ANALYSIS

■ Copenhagen
 ●●●● Benchmark
 ●●●● Benchmark Min
 ●●●● Benchmark Max



- Despite a growing “tourism-phobia” observed in some European cities, Copenhagen maintains a robust competitive advantage due to the welcoming nature of its residents.
- The city is also highly regarded for its overall visitor experience in terms of safety, which is greatly valued by tourists, positioning Copenhagen as a top choice for this attribute.

Period of analysis: The data reflected has been collected throughout the year 2023.



KEY COMPETITIVE INDEXES

COMPETITIVE STRENGTHS AND WEAKNESSES SUMMARY



Key Performance Indicators

COMPETITIVE ANALYSIS

Copenhagen's key performance indicators reflect a solid standing in the competitive tourism market. Visitors' expectations are usually met, with recommendations post-visit aligning with competitors. However, in the context of inflation, the city's cost perception often falls below that of its competitors. Additionally, the lower-than-average satisfaction scores concerning “diversity of things to do & visit” could impact visitors' willingness to return.

In 2023, Copenhagen has achieved two out of three set targets but still trails behind average competition in terms of the breadth of cultural experiences offered. The city's leading position in environmental stewardship, as recognized by visitors, helps to enhance its reputation.

	Overall Satisfaction	Overall value for money	Net Promoter Score (NPS)	Intention to repeat visit
Copenhagen	215	119!	52	39
<i>Benchmark AVG</i>	210	155	53	45
<i>Benchmark MIN</i>	174	94	30	20
<i>Benchmark MAX</i>	260 (Lisbon)	227 (Prague/Lisbon)	74 (Lisbon)	57 (London)

Net Promoter Score = % of promoters - % of detractors



Ranking out of 10 cities



Overall Satisfaction: #4



Commitment to Environment: #1



Cultural offering: #7

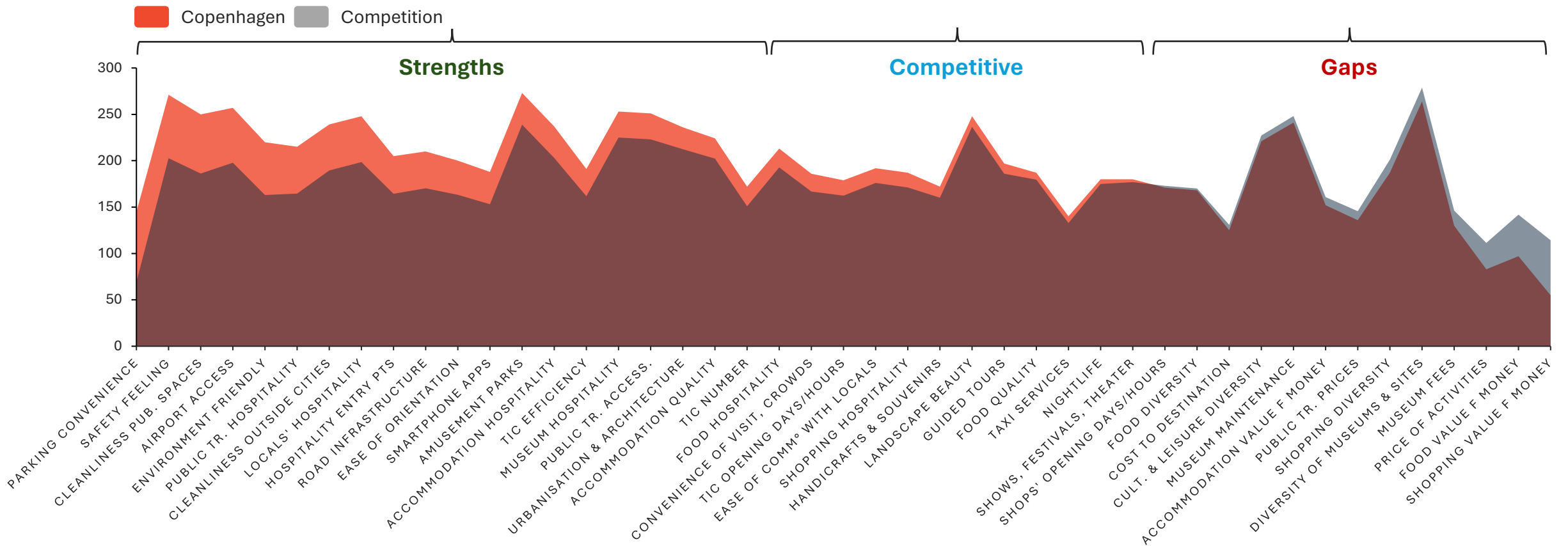
Competitive set: Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm and Brussels

Period of analysis: The data reflected has been collected throughout the year 2023.

Competitiveness Overview

STRENGTHS AND WEAKNESSES VS COMPETITION

Copenhagen secures leading positions in the areas of mobility and hospitality within the tourism sector, coupled with strong quality perceptions in accommodation, architectural beauty, and amusement park offerings, with great assistance and support offered to visitors. However, the city faces competitive disadvantages in terms of pricing and a perceived lack of diversity in shopping and cultural/leisure options, areas where other cities are perceived to have a competitive edge.



Importance Vs Performance

HOW DOES THE DESTINATION PERFORM ON FACTORS HAVING DIFFERENT IMPACT?

A solid visitor sentiment foundation for growing experiences

Copenhagen stands out in the tourism landscape for excelling in crucial areas that significantly impact the visitor's overall experience, including the warmth of the local people, safety, mobility, and cleanliness. The city consistently meets fundamental expectations regarding accommodations, as well as access to public transportation and the airport. This robust base provides a promising platform to enhance and market new experiences, aiming to bridge the existing competitive gap in the variety of activities, attractions, and shopping options available to tourists and that existing efficient on-site and digital information channels will be able to guide visitors to.

 Copenhagen overperforms Vs competition  Copenhagen underperforms Vs competition

Key Factors

Greatly influence both satisfaction and dissatisfaction

- Locals' hospitality
- Safety feeling
- Convenience for visiting, crowds
- Ease of orientation, mobility
- Cleanliness

Basic Expectations

Greatly impact on dissatisfaction if negative

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- Food quality
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Differentiators

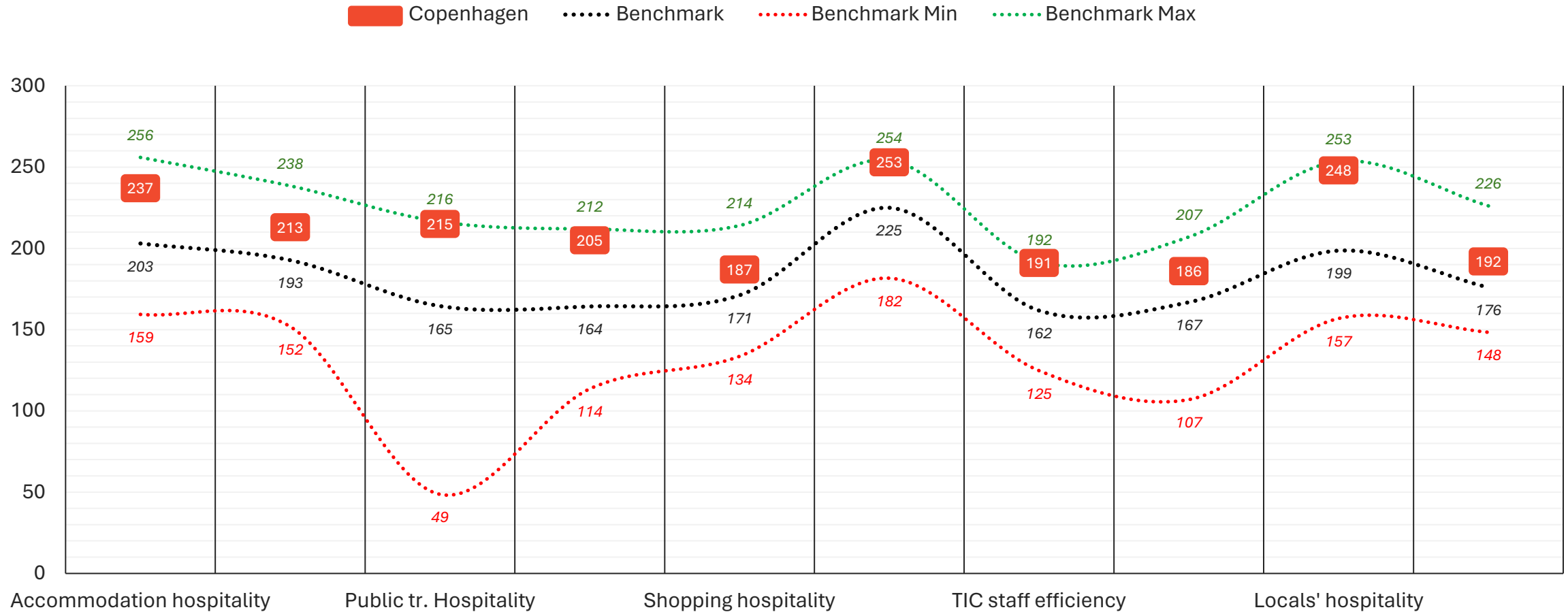
Factors that can make a difference for some visitors

- Nightlife, festivals
- Handicraft & souvenirs
- Tourist information centers
- Taxi services
- Amusement / Theme parks

Source: TRAVELSAT® Correlation Analysis to the overall Satisfaction – Llosa Matrix / 2023 (Cities, all markets)

Hospitality & Communication

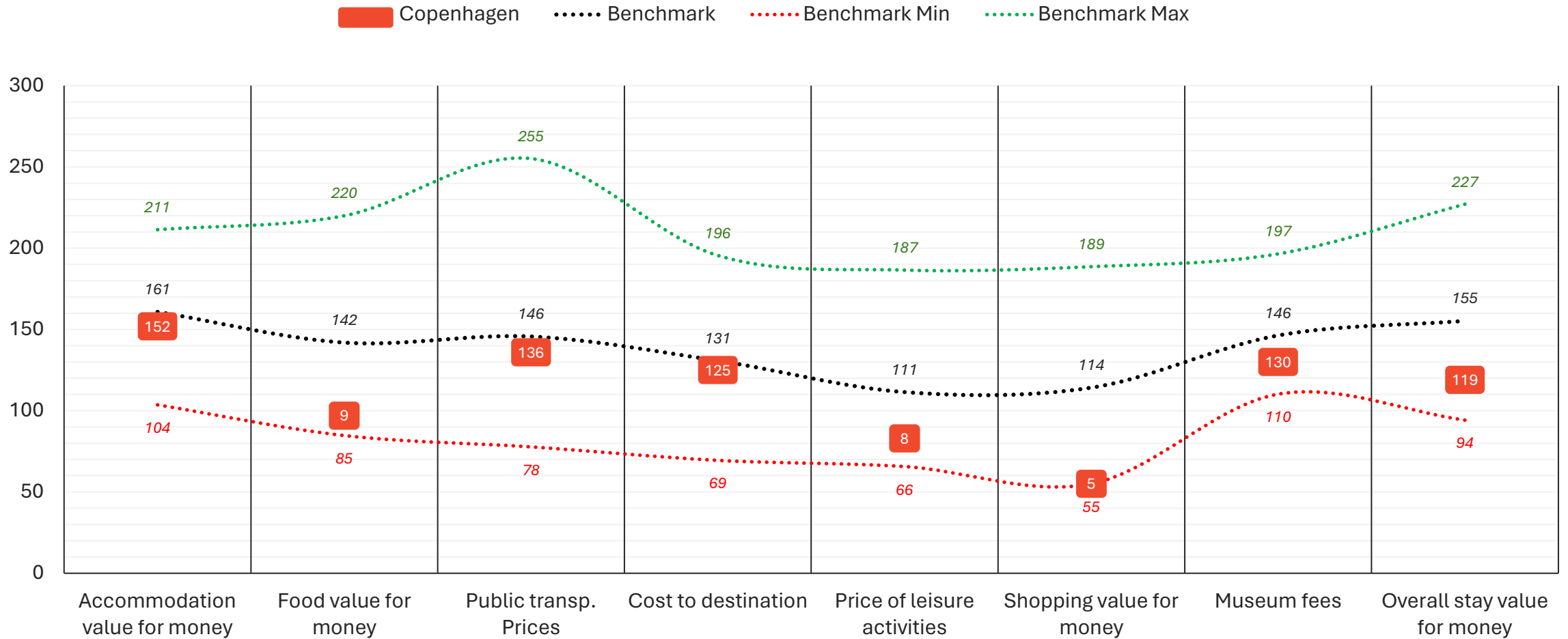
HUMAN INTERACTIONS THROUGHOUT THE JOURNEY



Period of analysis: The data reflected has been collected throughout the year 2023.

Price & Value for Money

THE PERCEIVED QUALITY OF EXPERIENCES FOR THEIR COST



Period of analysis: The data reflected has been collected throughout the year 2023.



Takeaways

THE COMPETITIVE POSITION OF COPENHAGEN

Takeaways

KEY POINTS TO KEEP IN MIND

Despite pricing challenges Vs competition, Copenhagen's strong visitor satisfaction drives potential for further development of experiences and achievement of its Tourism Goals

1. Copenhagen's visitor sentiment performances show a **competitive standing**, with visitor **expectations usually met** and post-visit recommendations and **overall satisfaction on par with rivals**.
2. **Copenhagen leads in mobility and hospitality-related sentiment**, and gets competitive scores for **accommodation, architectural and amusement park experiences**, alongside **efficient visitor support**.
3. The city also stands out for **key aspects** affecting visitor experiences—**friendly locals, safety, mobility, and cleanliness**.
4. While Copenhagen faces **challenges in competitive pricing and perceived limited diversity in shopping and cultural /leisure activities**, this strong foundation is **ideal for expanding and promoting new experiences**, aiming to close the competitive gap and **leveraging its effective information channels to navigate tourists**.
5. By 2023, **the city hit two of its three targets** but lags in cultural experience breadth. Its reputation is **bolstered by commendable environmental stewardship**.





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