



# TRAVELSAT© Competitive Index

Benchmarking the Copenhagen MICE visitor experience





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# TRAVELSAT<sup>®</sup> Competitive Index

Introducing the survey methodology





# The Global Standard

For benchmarking visitor experience

Why benchmarking your visitor experience is focal!

## Brand experience



Prompters for choosing a destination

TRAVELSAT<sup>®</sup> Competitive Index is **the global independent UNWTO endorsed standard** measuring visitor **experience quality**.

In 2011, the TRAVELSAT<sup>®</sup> Competitive Index received the prestigious **UNWTO Ulysse Award** recognizing the research program's excellence and innovation for Destination Organizations. Since then, 100+ destinations and tourism brands have used TRAVELSAT<sup>®</sup> successfully, building **the largest competitive research platform for destinations!**

# TRAVELSAT<sup>®</sup> Index

The UNWTO-endorsed reference



## A global standard for all destinations

Endorsed by international tourism authorities



## Trust from 100+ clients in 5 continents

Including local, regional, national tourism boards and DMOs in Europe, Caribbean, North America, Middle East, Indian Ocean and Asia Pacific.



## 60+ indexes on the whole visitor experience

Accommodation, transportation, food, leisure and cultural activities, shopping, safety feeling, heritage, landscape, hospitality, cleanliness, value for money...



## Unrivalled competitive benchmarking options

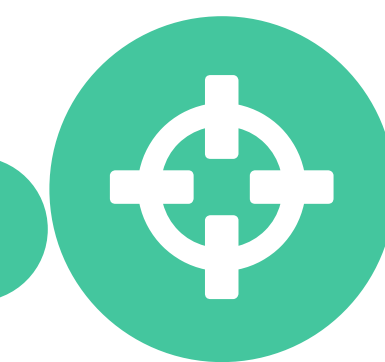
Based on geographical, markets, travel segmentation and geo-topic norms (Cultural explorers, Business/MICE, Millennials, Families, City breakers...)



## A reliable methodology

Generating reliable data collection and advanced benchmarking analysis.





A flexible multi-sourced recruitment that maximizes cooperation rates, sample quality and data comparability



## Screening in outbound markets

- Quarterly sampling of the past 3 months of visitors screened from national representative online access panels across 25+ markets worldwide (\*).
- Respondents completed a post-visit rating survey based on the last destination they visited, fueling the TRAVELSAT© global benchmarking database.
- The database has been enriched by an ongoing screening to target specific destinations and markets.



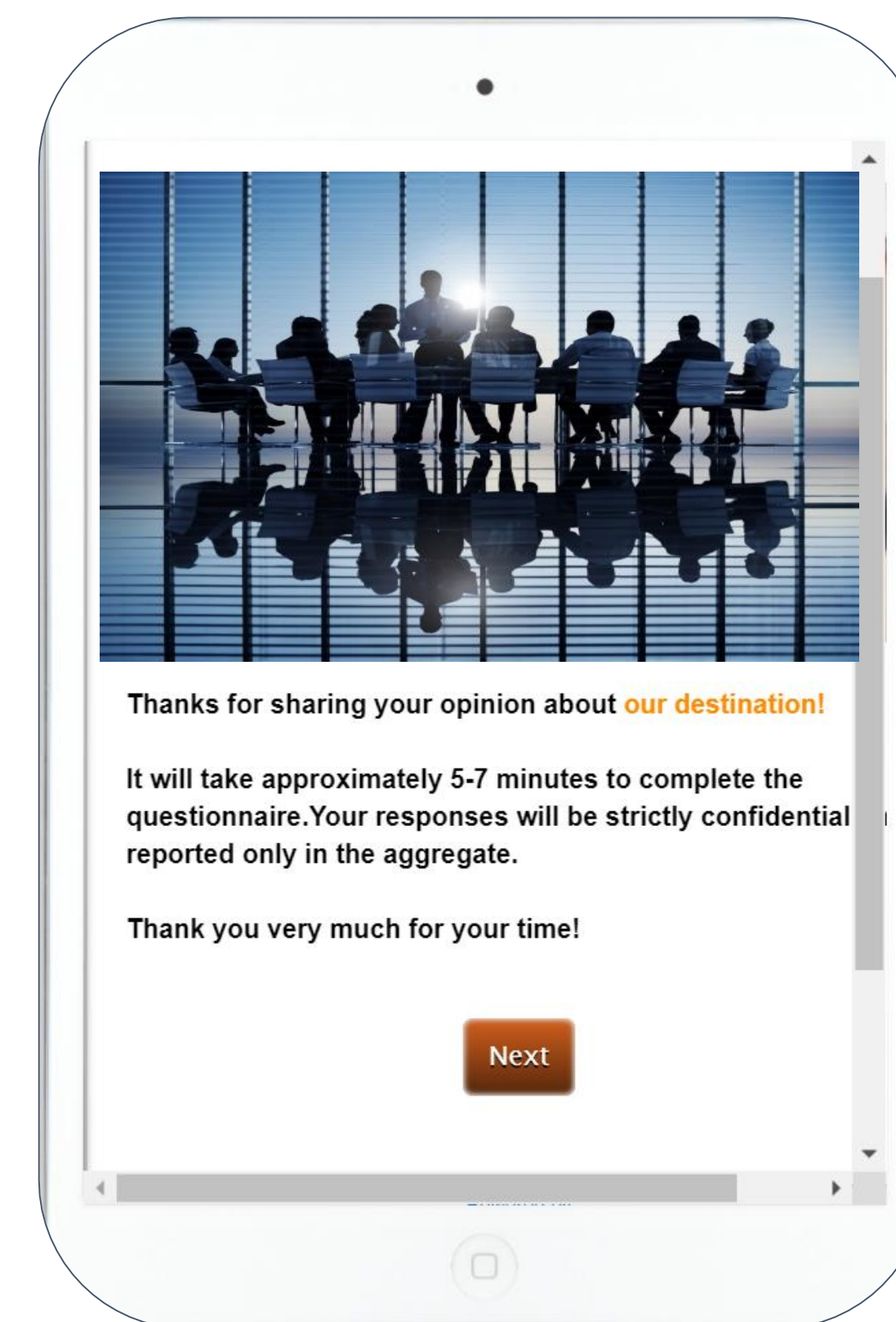
## Recruitment at destination

- Random face-to-face email collection in tourist "hubs" (airports, attractions, visitor information centers ect.).
- Once back home, respondents were invited by email to complete a survey rating their stay (after the full trip experience).





## Standard multi-lingual online questionnaire


- A standard responsive questionnaire available in 10 languages (~10 minutes to complete).
- Directed to all respondents regardless of the way they have been recruited.
- Includes extensive ratings and trip / visitor profiling for segmentation purposes.
- Ensures consistency and data comparability for all destinations and markets.




A benchmarking measurement

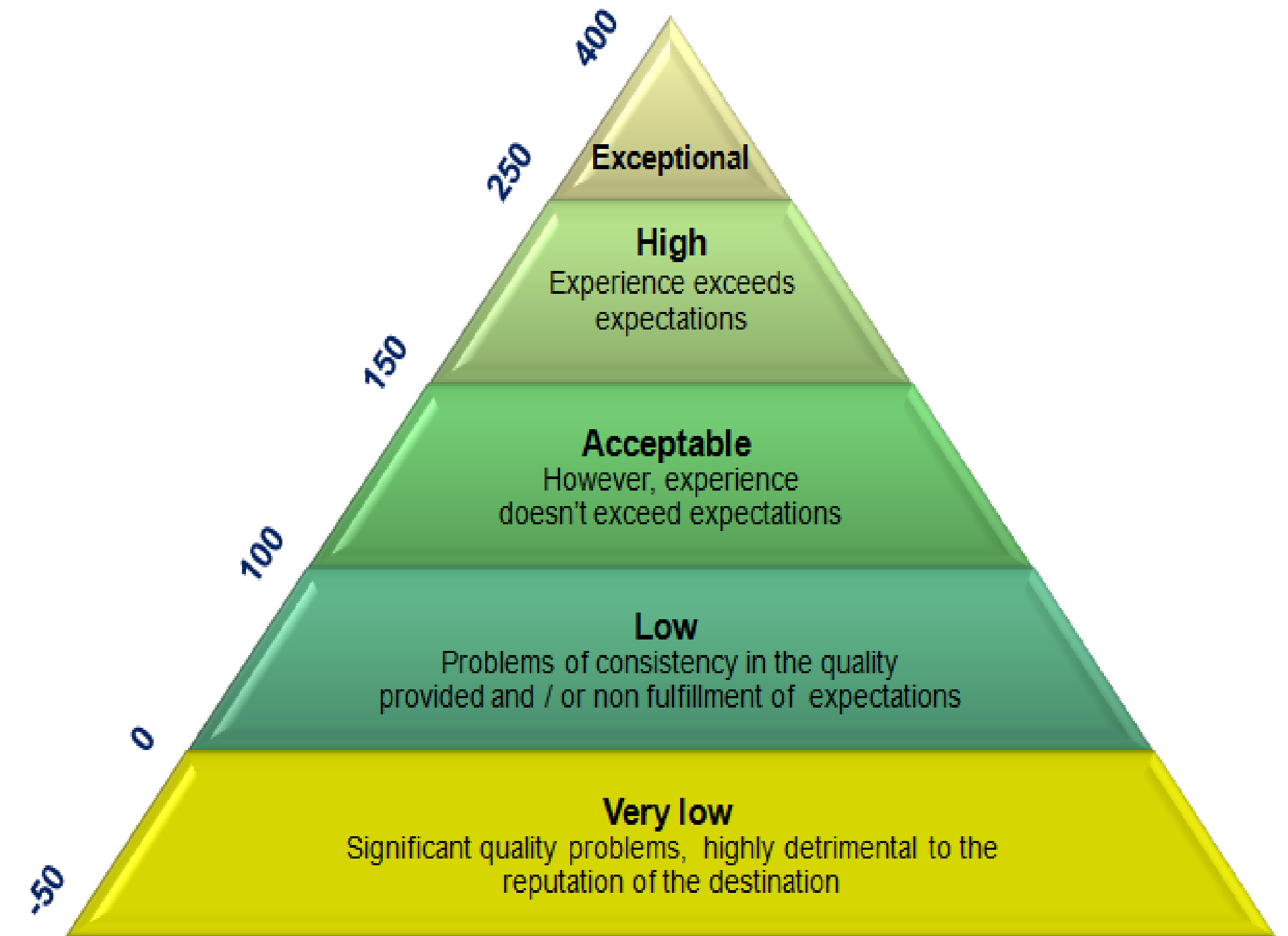
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TRAVELSAT© applies a standard proprietary scoring from the 1 to 10 satisfaction rating scale used in the questionnaire.
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The index reflects the level satisfaction for each criteria rated and fluctuates from -50 to 400.
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Scores from extremely satisfied or dissatisfied visitors (likely to greatly influence the destination's reputation) are more valued in the scoring compared to the averages.
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The primary purpose of the index is to benchmark destinations' experience quality compared to the average norms and competition In this report, norms reflect the **average MICE experience** in the following cities: *Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague*



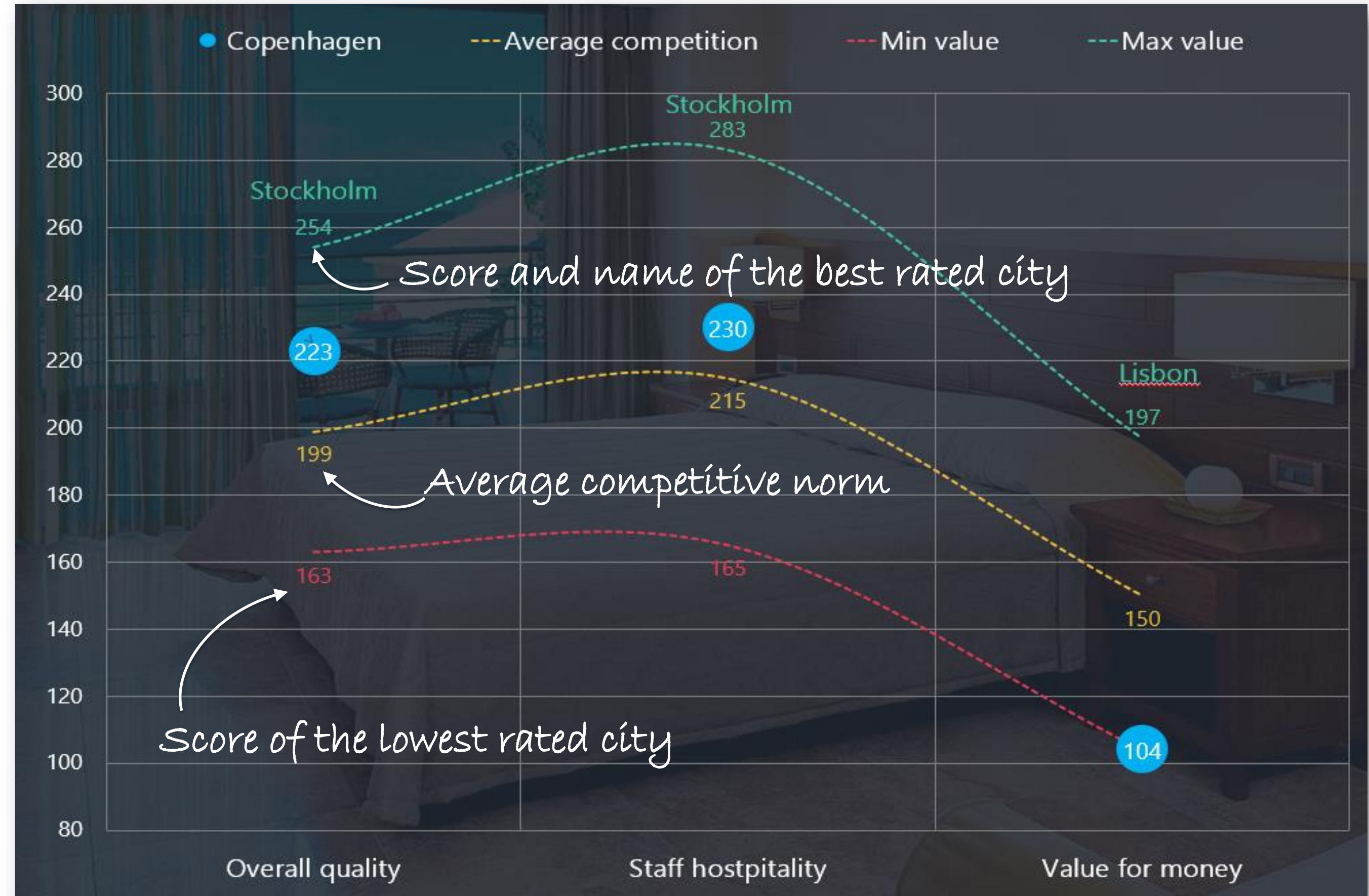




# Analytic Scope on the MICE segment

A "Best-in-class" competitive analysis

- **Target:** International MICE visitors (at least one night) having meetings, conferences, conventions, congress, trade fairs or incentive trip as the primary purpose of visit.
- **Travel period consolidated:** 2015-2018, all seasons
- **Sample size :** 405 interviews with MICE visitors in Copenhagen. A gap of 15 points indicate a significant competitive difference.
- **Competitive Set:** Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin and Prague (3000+ interviews). These cities were chosen to match the competitive set of the main competitive index report, as much as possible, in order to see variations in satisfaction between the general tourist and MICE tourists. Additionally, Vienna has been included in this analysis, since it is a popular MICE destination.

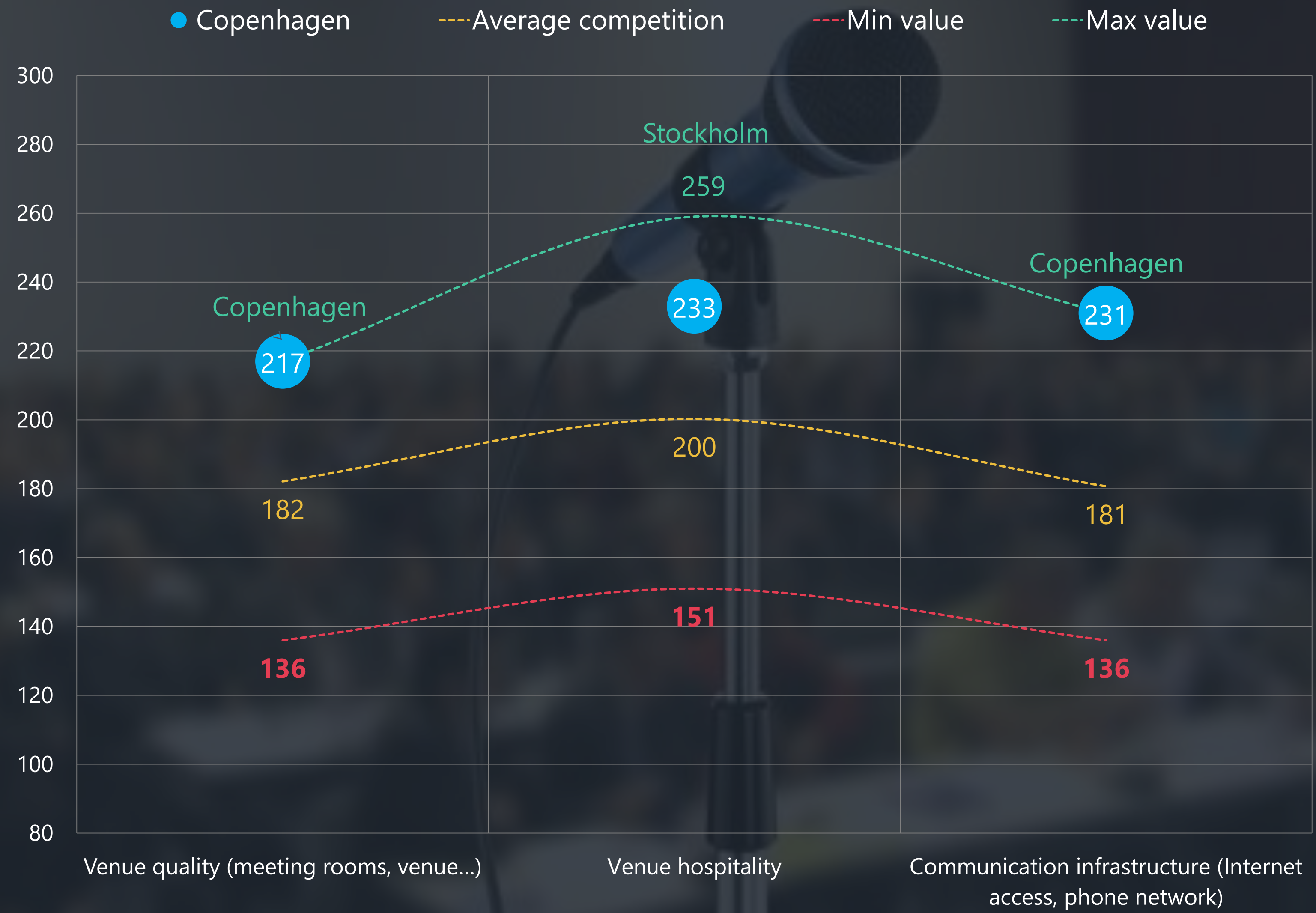


# The MICE Visitor Experience Journey





# VENUE QUALITY AND HOSPITALITY

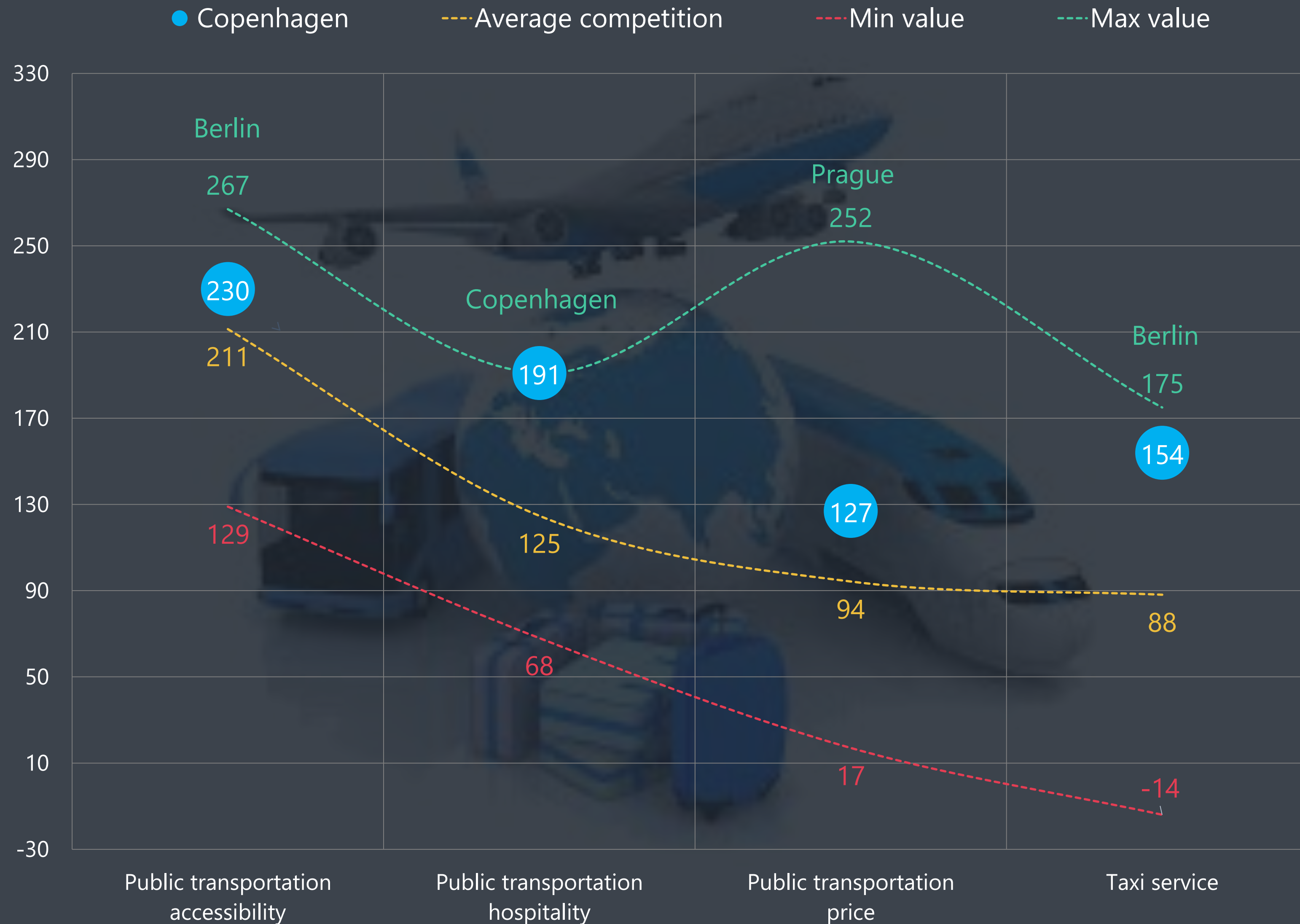


Copenhagen is **best-in-class** for **venue quality and communication infrastructure**, which are two major drivers of MICE visitor's satisfaction. **Hospitality of venue staff** in Copenhagen is also rated **higher than average** competition although Stockholm manages to offer an even better experience on this criteria.

Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague



# PUBLIC TRANSPORT & TAXI



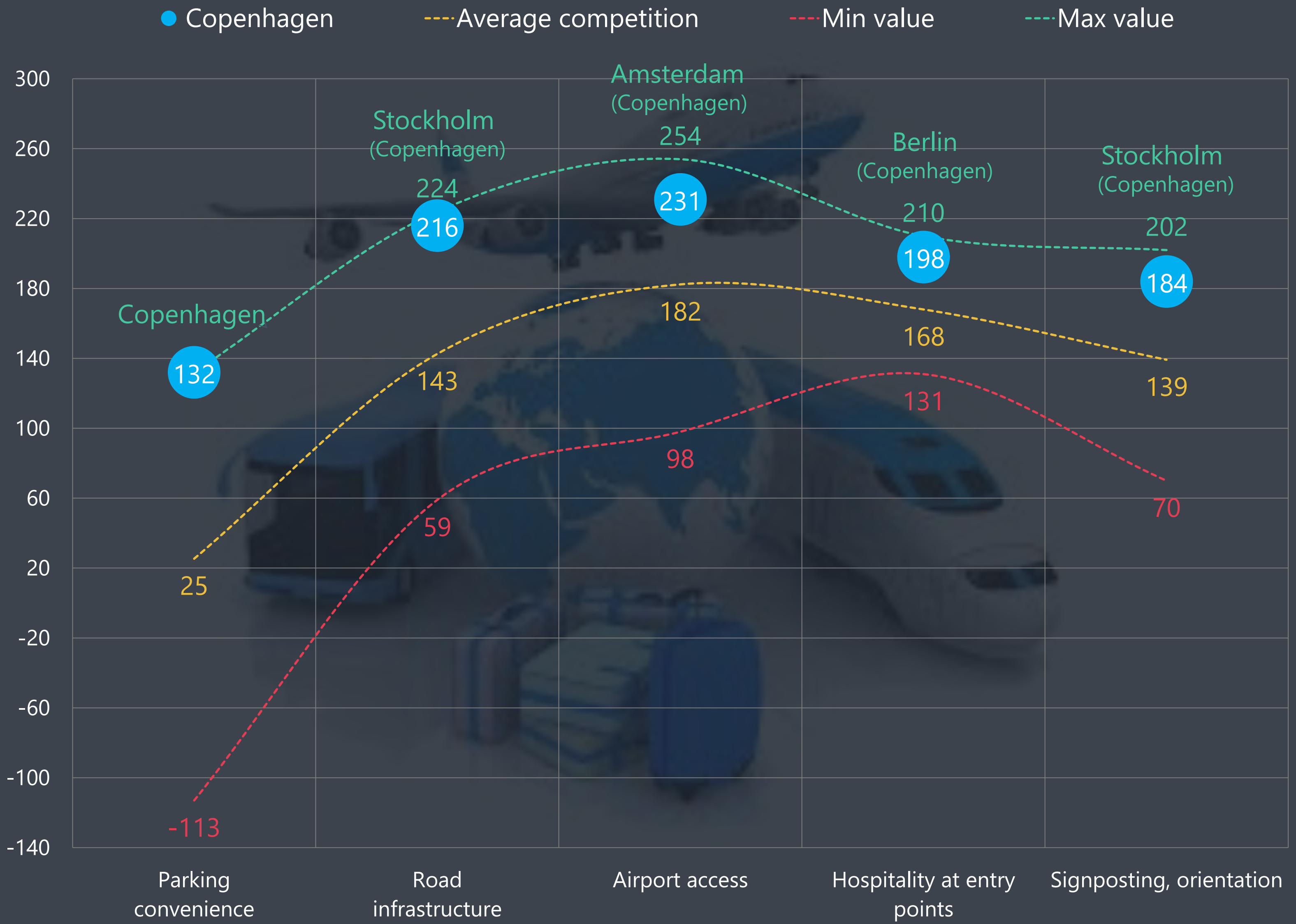
**Mobility for MICE visitors is a strong competitive asset for Copenhagen** – both in terms of public transportation and taxi services. The **staff in public transportation in Copenhagen** is best rated within the competitive scope.

However, Berlin is rated as best-in-class for its taxi service and the general accessibility of its public transportation system.

Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague



# TRANSPORTATION INFRASTRUCTURE



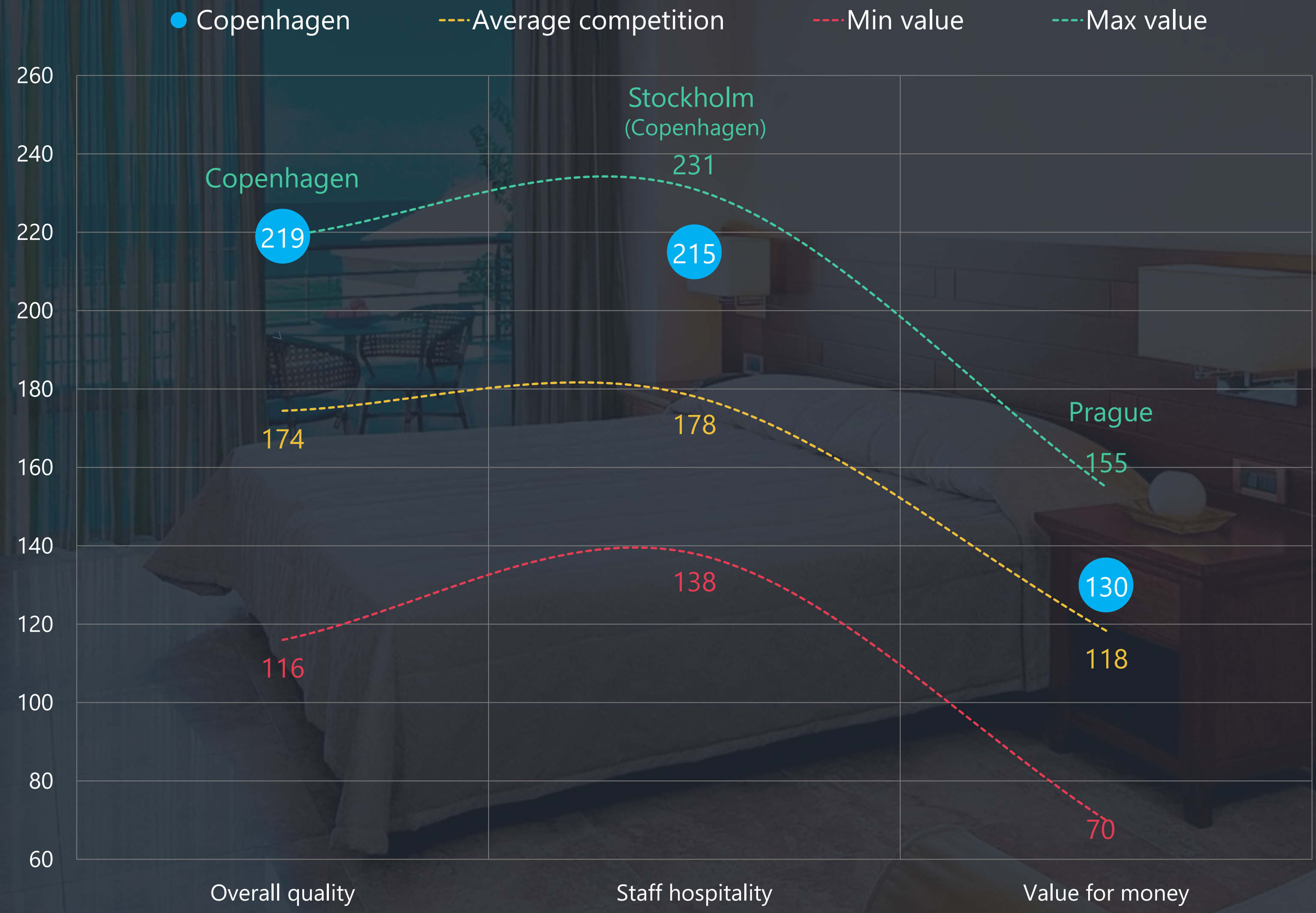
Copenhagen offers a **high quality, competitive and very consistent transportation experience** to its MICE visitors, widely surpassing competitive norms for all aspects evaluated.

It co-leads best-in-class positions with Stockholm, Berlin and Amsterdam.

Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague



# ACCOMMODATION EXPERIENCE



**Copenhagen enjoys very high, and competitive, levels of satisfaction amongst MICE visitors for two important facets of the experience: Accommodation quality and hospitality.**

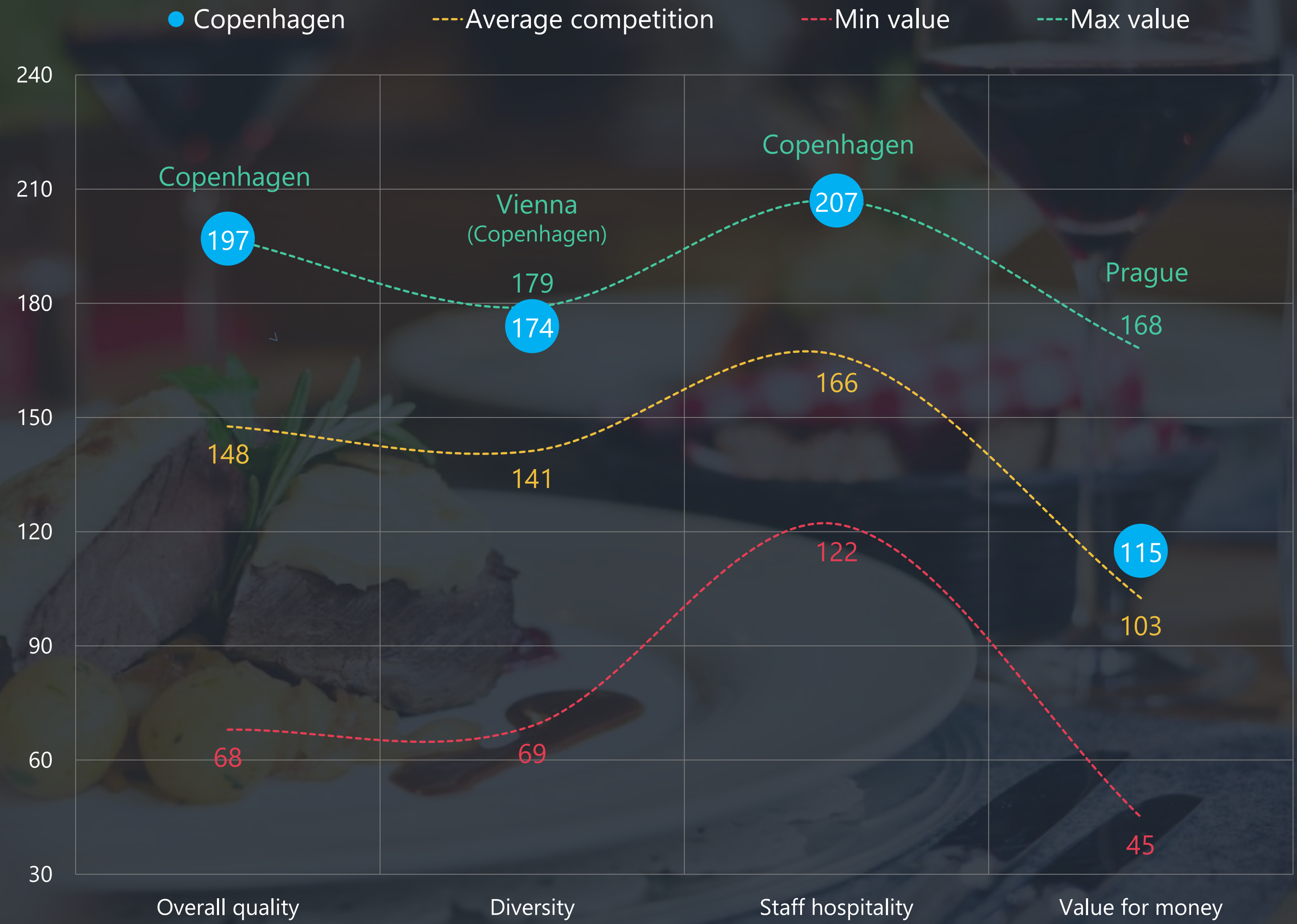
Quality perceptions **positively fuels the evaluation of accommodation in terms of value for money**, even though Prague is best-in-class on this aspect.

Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague





# FOOD EXPERIENCE

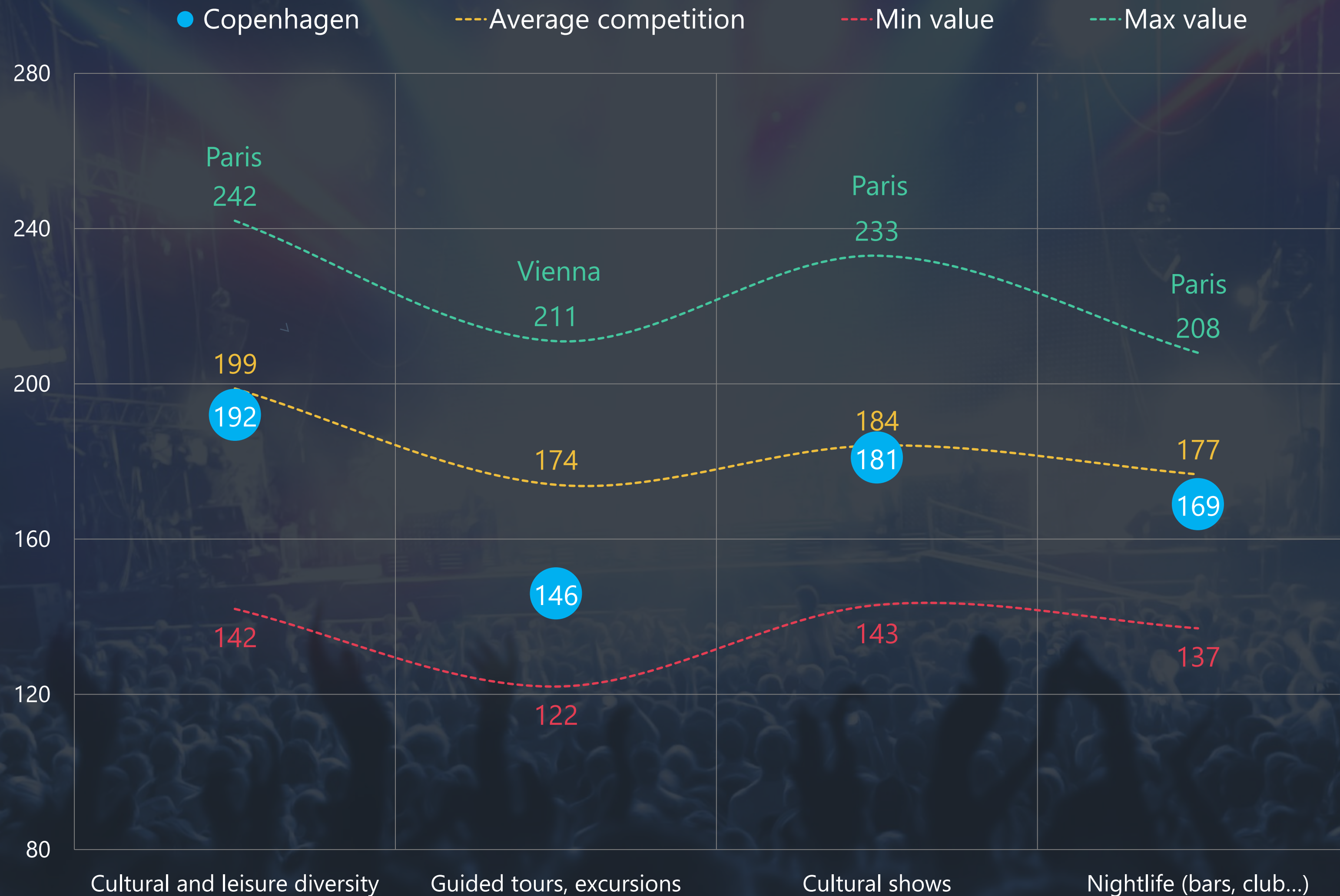


Copenhagen reaches **best-in-class ratings for its food quality and diversity of food experiences**, as well as for the **staff hospitality** at restaurants. This is a precious asset, since food and beverages are **differentiators for meeting planners**.

Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague



# CULTURAL AND LEISURE ACTIVITIES

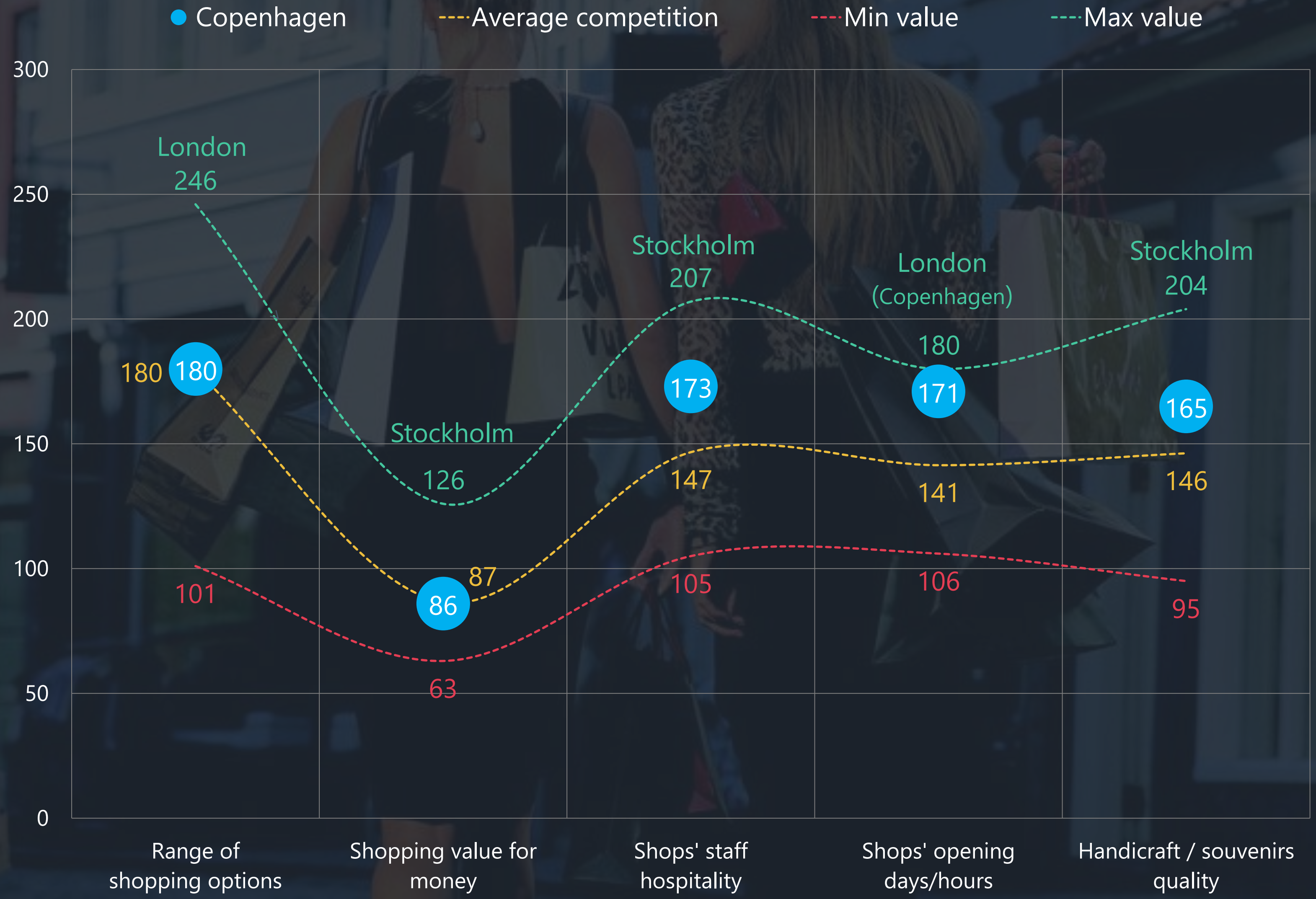


**Copenhagen** is rated **close to average** in terms of **cultural** and **leisure activities**. However, the quality of the **guided tours** and **excursions** is rated **particularly low** for Copenhagen, making it an important aspect to improve in the future.

The satisfaction with cultural and leisure activities among MICE visitors is an important factor to consider as a potential activator for **converting a MICE-visitor into being a leisure visitor as well**. Furthermore, it will improve the likelihood of MICE visitors recommending the destination to others.



# SHOPPING EXPERIENCE



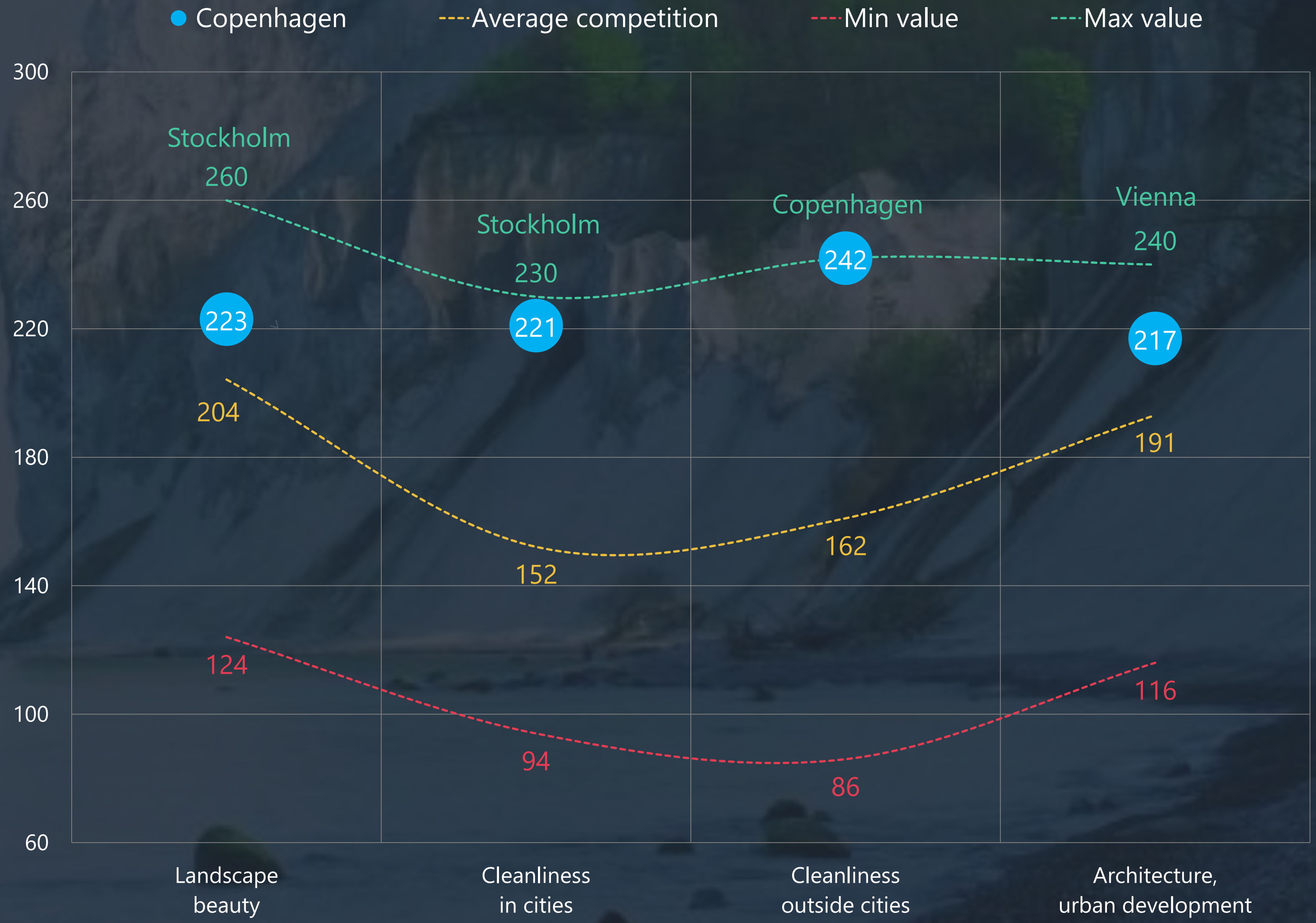
In a competitive shopping environment where London and Stockholm dominates, **Copenhagen manages to score well above average in the competitive set.**

*"Coming back home with a souvenir"* is known to be one of the favorite "bleisure" activities amongst MICE visitors, meaning there is potential in improving the **perception of shopping options** and **quality**. The quality aspect, in particular, can help offset the average rating in terms of value for money.

Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague



# ENVIRONNEMENT



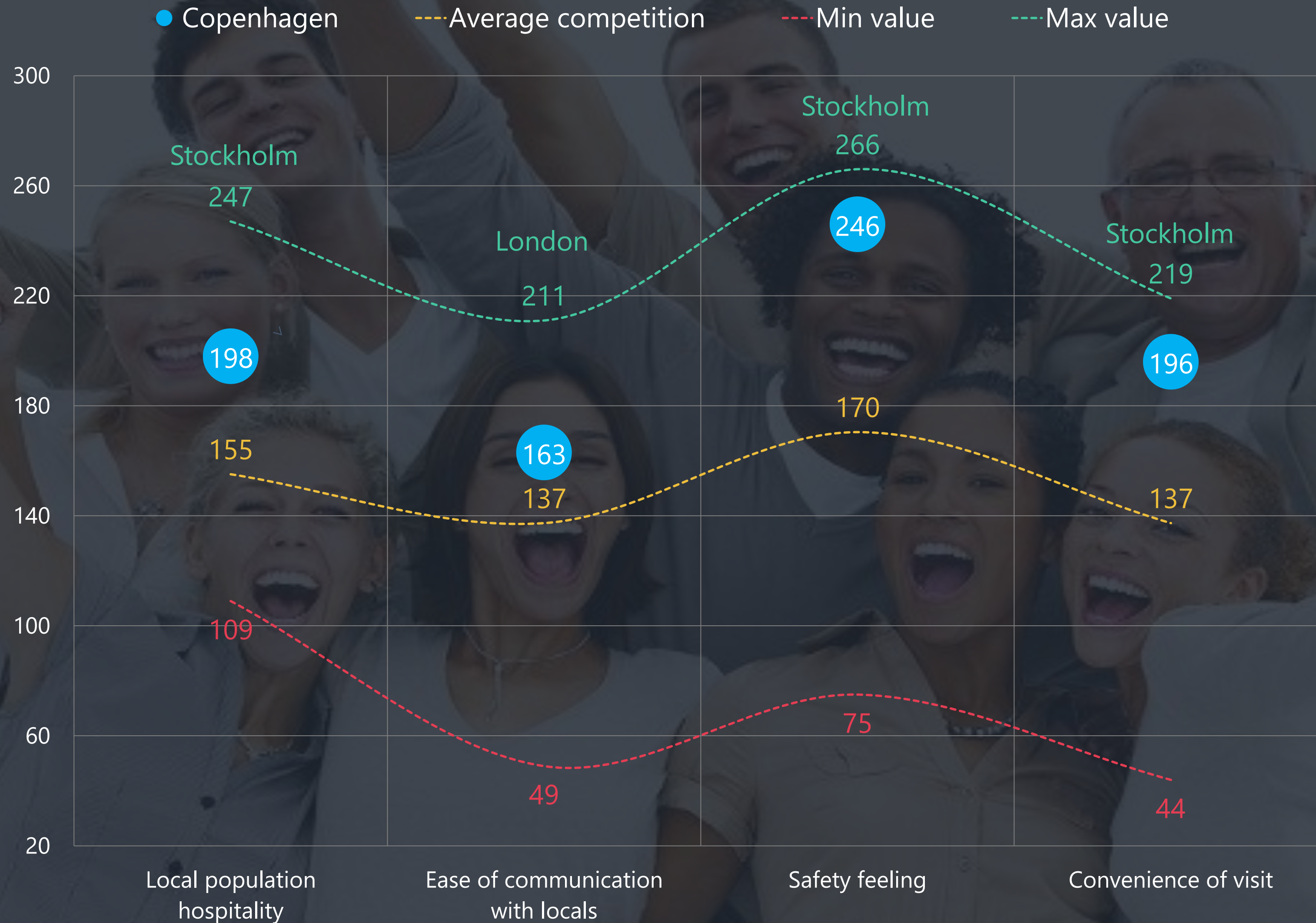
The **picturesque environment of Copenhagen** (landscape, architecture, cleanliness) is a clear competitive strength for the city, reinforcing the idea of a **pleasant context for business activities** and **after-work exploration** of the city.

**Stockholm and Vienna** are best-in-class cities in 3 out of 4 of these aspects, but they are both closely followed by Copenhagen, which scores well above average on all aspects.

Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague



# LOCAL HOSPITALITY



Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague



The Danish capital is rated as a **very safe city with a hospitable local population**, offering high visitor convenience.

**Stockholm** is best-in-class in 3 out of 4 areas in terms of local hospitality.



# Transverse analysis





TRAVELSAT

Competitive Index



# Key Competitive Indexes

	Overall fulfilment of expectations	Intention to recommend (net %)	Intention to repeat visit (net %)
<b>COPENHAGEN</b>	198 	65%* 	53%*
AVERAGE COMPETITION	162	68%	51%
MAX VALUE	198 (Copenhagen)	81% (Berlin)	62% (Vienna)
MIN VALUE	142	47%	43%



The excellent quality performances mentioned earlier at numerous important steps of the visitor experience journey (*venue, accommodation, food, transport, safety, hospitality...*) makes **Copenhagen best-in-class for the overall satisfaction** evaluation.

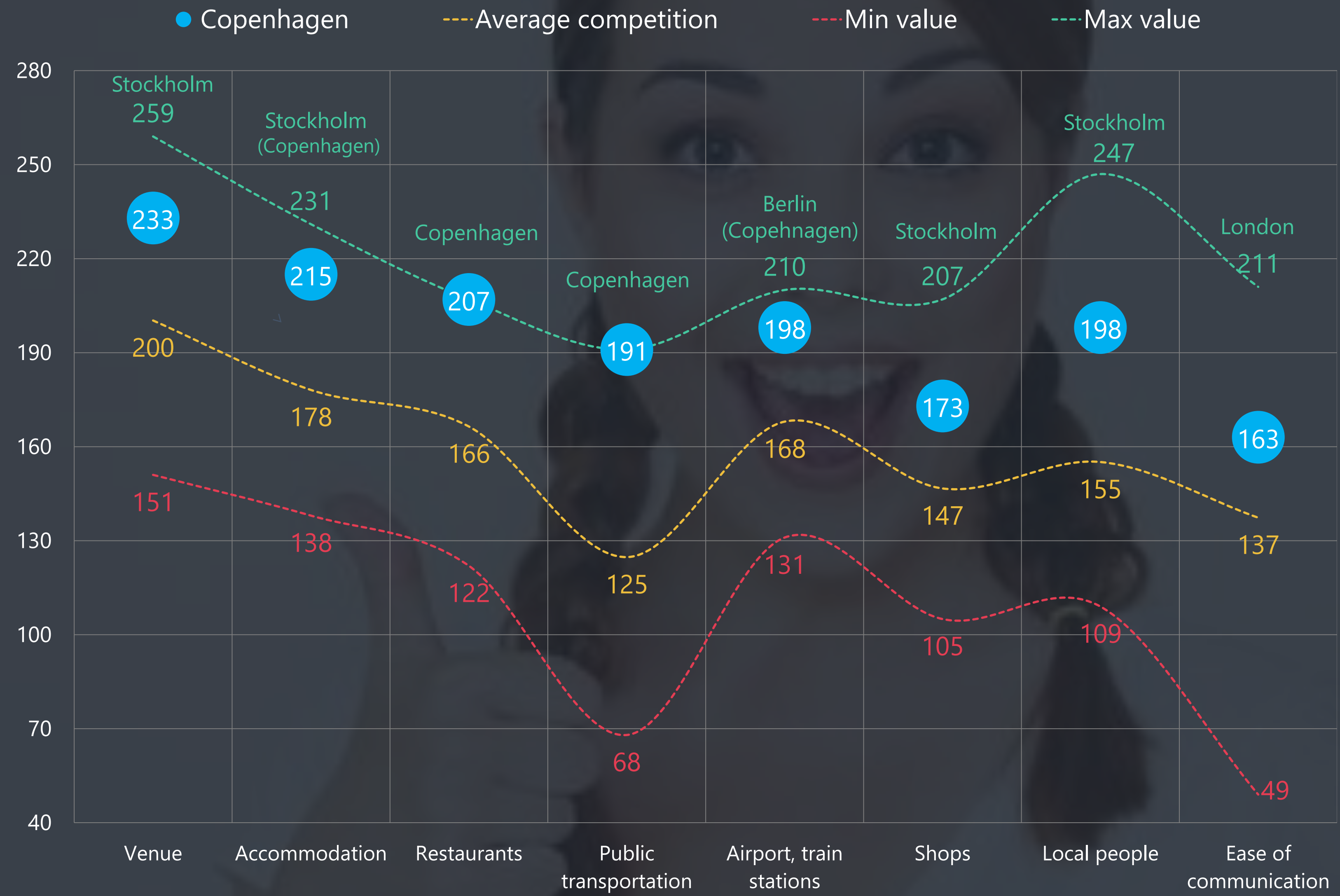
However, this satisfaction level **only partially converts MICE visitors into destination ambassadors**. This is likely due to the less competitive ratings for culture and leisure activities, that MICE visitors can take part in, when they are off duty.

**Competitive scope:** Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague

\*These scores are based on a proprietary weighted average calculation and not on a traditional net-score calculation (positive-negative).



# PERSONAL HOSPITALITY CHAIN



**Copenhagen delivers an excellent and competitive personal contact at all steps of the visitor journey, with no particular shortcoming in the contact chain being reported.**

Stockholm does, however, out-perform Copenhagen in a few business and non-business related areas (venues, shops and with local inhabitants).

Competitive scope: Barcelona, Brussels, Amsterdam, London, Vienna, Paris, Stockholm, Berlin, Prague



# Competitive Gaps Summary

## The Copenhagen Brand Experience

Summary of the key strengths, weaknesses, opportunities and threats for Copenhagen in the competitive MICE market



### Strengths

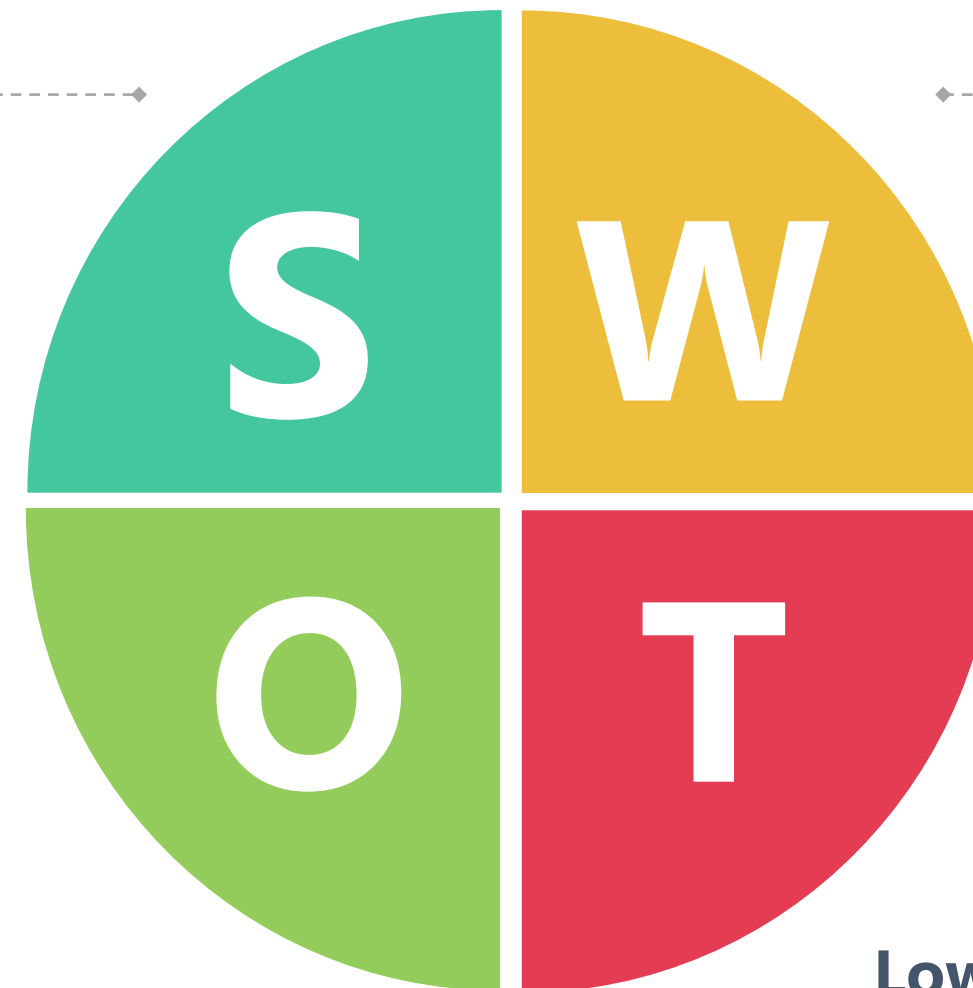
Competitive advantage on important factors

- Venue and communication infrastructure
- Mobility and transportation efficiency
- Accommodation and food quality
- Clean and safe experience
- Hospitable experience



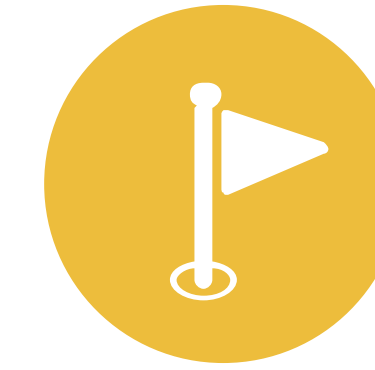
### Opportunities of differentiation

- Picturesque experience
- High visitor convenience



### Whatchlist

To be monitored



- Shopping range
- Handicraft quality
- After work experiences (nightlife, cultural events...)
- Diversity of culture and leisure activities

### Threats

Low competitiveness on important factors



- Excursions/guided tours



# Take-aways





# Key findings

What the data is telling us

23

## MICE expectations are fully met, but “bleisure” experiences must be improved

- **Copenhagen offers an excellent visitor experience according to MICE-travelers.** Copenhagen is providing a **highly competitive quality** within areas which are very important for business travelers: *Venue quality, ease of communication, transportation infrastructure, accommodation and food.* Furthermore, *Copenhagen provides a safe and friendly environment*, offering a great context for business experiences.
- The fact that Copenhagen is **perceived as a picturesque capital with high visitor convenience** is also a **competitive assets**.
- It is suggested to **improve activities which MICE travelers can experience after work**, to make up for the competitive gap of satisfaction among business visitors who expect increasingly **more bleisure experiences during their stay**. An increase in after-work experiences could convert more MICE visitors into active destination ambassadors.
- **Guided tours and excursions** and particularly **evening activities**, could be prioritized to increase competitiveness.
- Efforts are needed for guiding business visitors to the **unique and diverse shopping opportunities** in the city. An increased focus on **improving the quality of shopping items** could help offset the average rating in terms of value for money.

