

TRAVELSAT© Competitive Index

Benchmarking the Copenhagen Brand Experience

2018



WONDERFUL
COPENHAGEN



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Identifying the main competitors of Copenhagen in travelers' minds (alternative cities considered)

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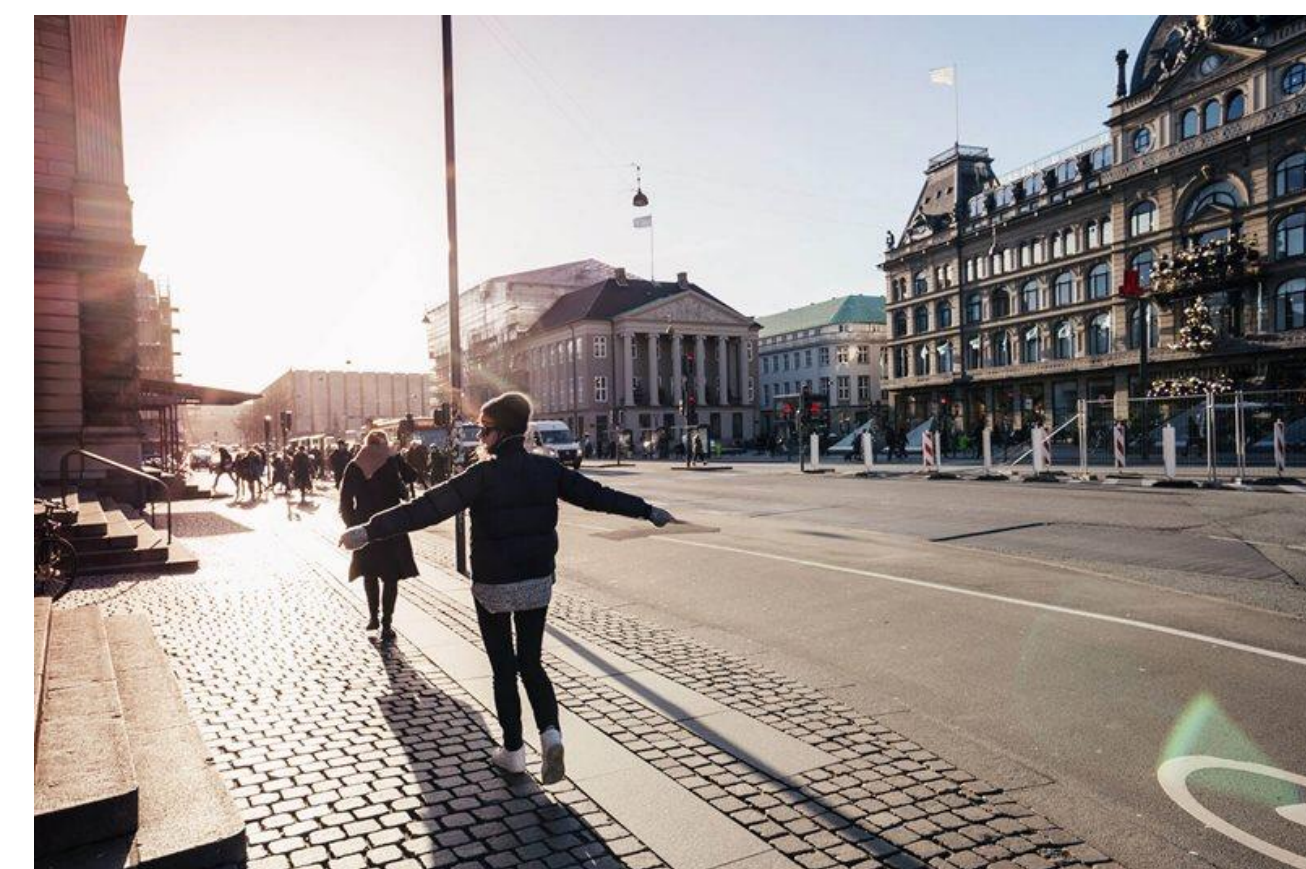
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Who are your Competitors?

Mapping Copenhagen's competition in travelers' minds



Methodology

Mapping destinations considered to be in the same competitive set as Copenhagen in the travelers' decision making process

Which destinations have you visited?

Which alternative destinations did you consider?

Why did you finally chose this destination?



The Competition Mapping is based on two standard questions asked to all travelers in the global TRAVELSAT survey: alternatives considered and reasons for choosing. TCI Research has tracked all "combinations of destinations" that were considered together in the travel inspiration process from our global database.

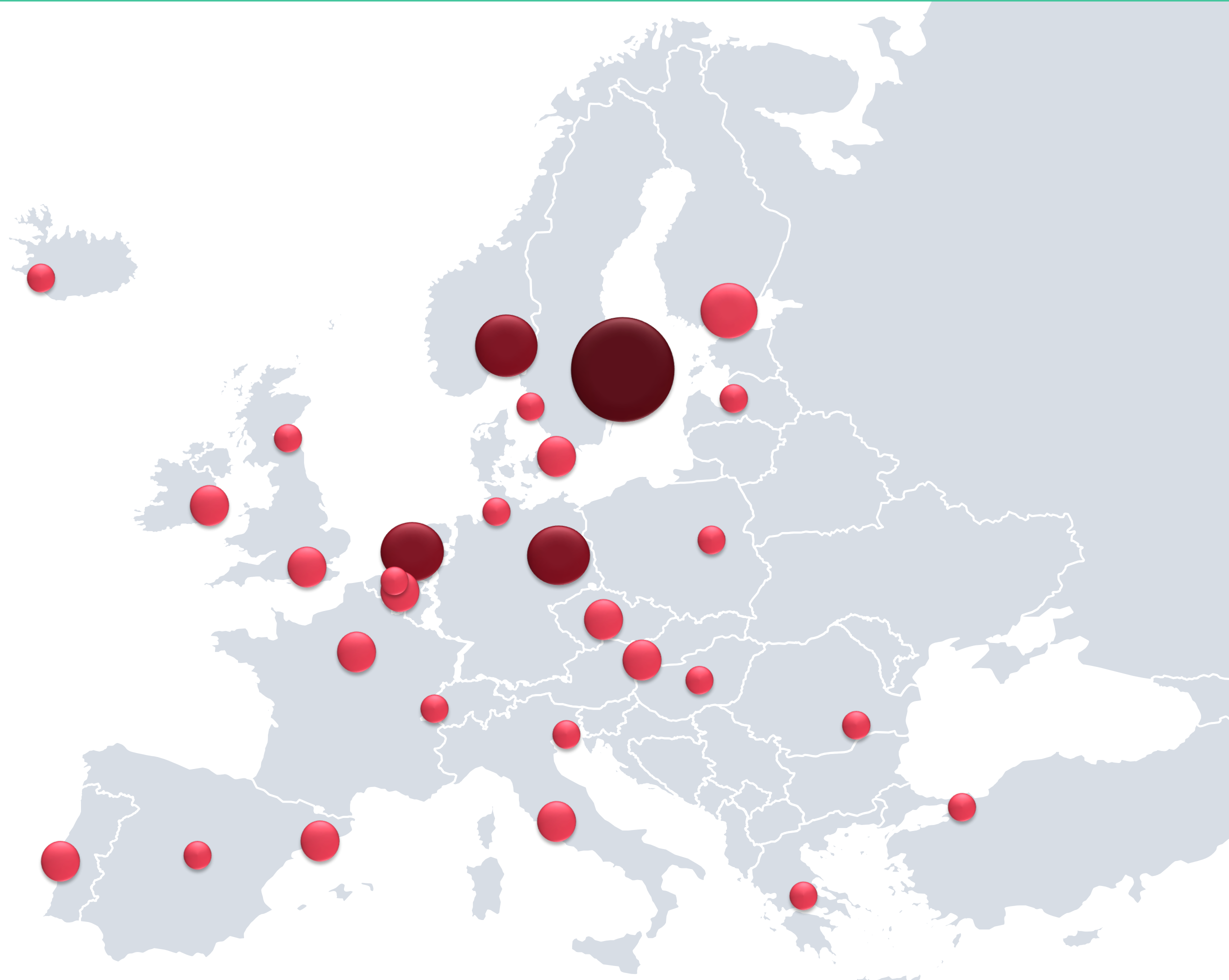
These 3 examples illustrate that London, Brussels, Berlin, Rome and Stockholm can be considered as being part of the same competitive set as Copenhagen.

TOP 30 Destinations “competing” with Copenhagen

Cities considered together with Copenhagen in travelers’ decision making process

TOP 30 ASSOCIATIONS – Among respondents from all markets

- Stockholm
- Oslo
- Berlin
- Amsterdam
- Helsinki
- Rome
- London
- Prague
- Paris
- Dublin
- Malmö
- Vienna
- Brussels
- Lisbon
- Reykjavík
- Barcelona
- Budapest
- Göteborg
- Riga
- Warsaw
- Bruges
- Edinburgh
- Madrid
- Tallinn
- Venice
- Geneva
- Hamburg
- Athens
- Bucharest
- Istanbul



Each city's rating is indicated by the size of its associated circle

Nordics and way beyond!

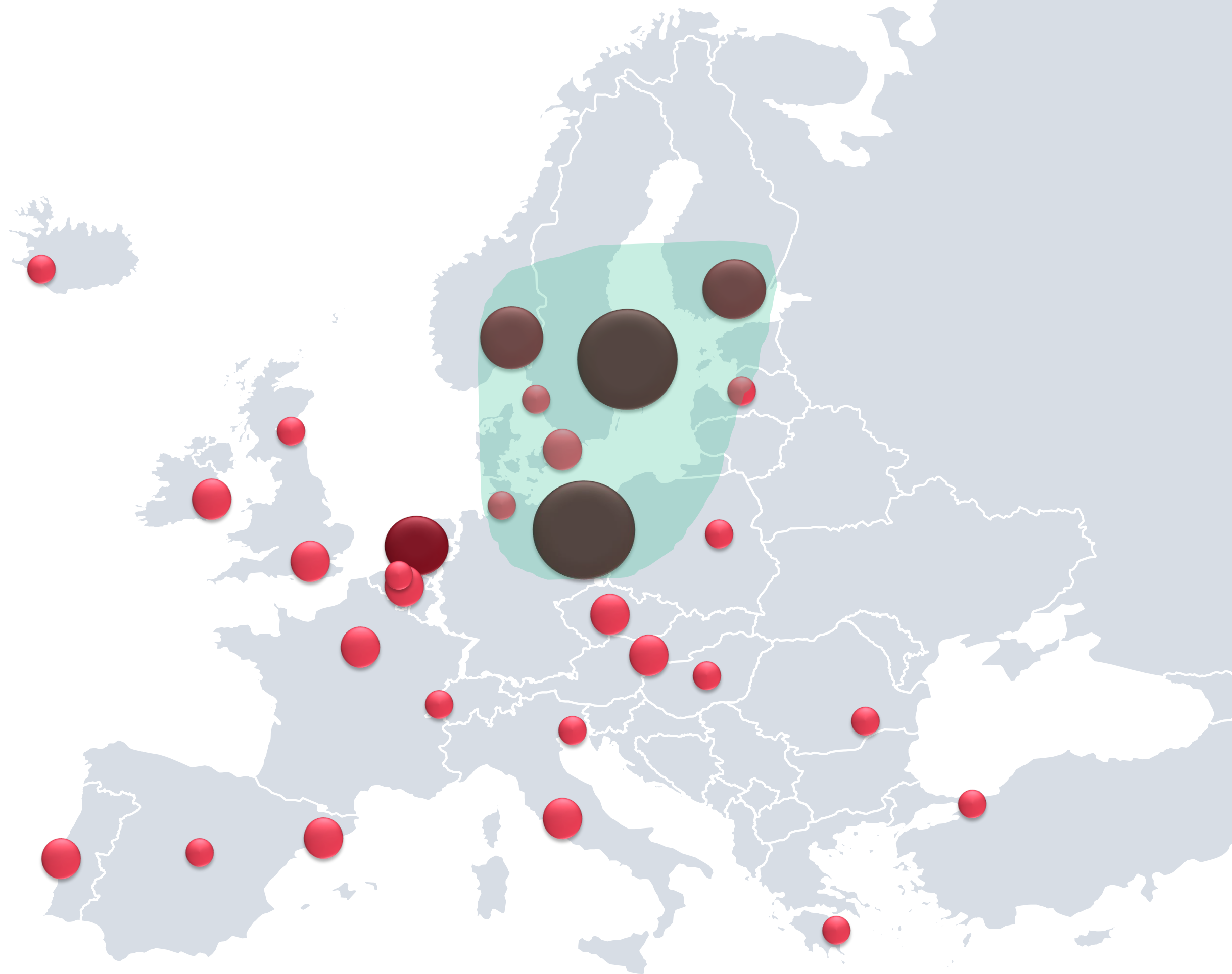
While Copenhagen’s competitive set includes the **usual Nordic suspects** – with **Stockholm in the lead** - it also includes a broader group of **Premier League and secondary European cities** offering cultural city break experiences all over Europe (Amsterdam, Rome, Prague, Paris, London, Lisbon, Dublin ect.)

TOP 30 Destinations “competing” with Copenhagen

Cities considered together with Copenhagen in travelers’ decision making process

TOP 30 ASSOCIATIONS - Among respondents from European markets

- Stockholm
- Berlin
- Amsterdam
- Oslo
- Helsinki
- Brussels
- Dublin
- London
- Malmö
- Paris
- Prague
- Rome
- Vienna
- Barcelona
- Budapest
- Lisbon
- Reykjavík
- Riga
- Istanbul
- Warsaw
- Bruges
- Edinburgh
- Hamburg
- Madrid
- Tallinn
- Athens
- Bangkok
- Bucharest
- Kraków
- Sofia



Each city's rating is indicated by the size of its associated circle

FOCUS ON EUROPEAN MARKETS

Berlin - the other challenger...

Association patterns illustrate an extreme diversity of geographical choices, but Stockholm remains the **number 1 alternative destination to Copenhagen** in travelers’ minds, and **Berlin seems to be a strong contender as well.**

TOP 30 Destinations “competing” with Copenhagen

Cities considered together with Copenhagen in travelers’ decision making process

TOP 30 ASSOCIATIONS – Among respondents from long-haul markets

Stockholm

Oslo

Dublin

Paris

Rome

Amsterdam

Helsinki

Prague

Berlin

Brussels

Geneva

London

Vienna

Malmö

Reykjavík

St Petersburg

Sevilla

Lisbon

Athens

Barcelona

Budapest

Edinburgh

Salzburg

Venice

Madrid

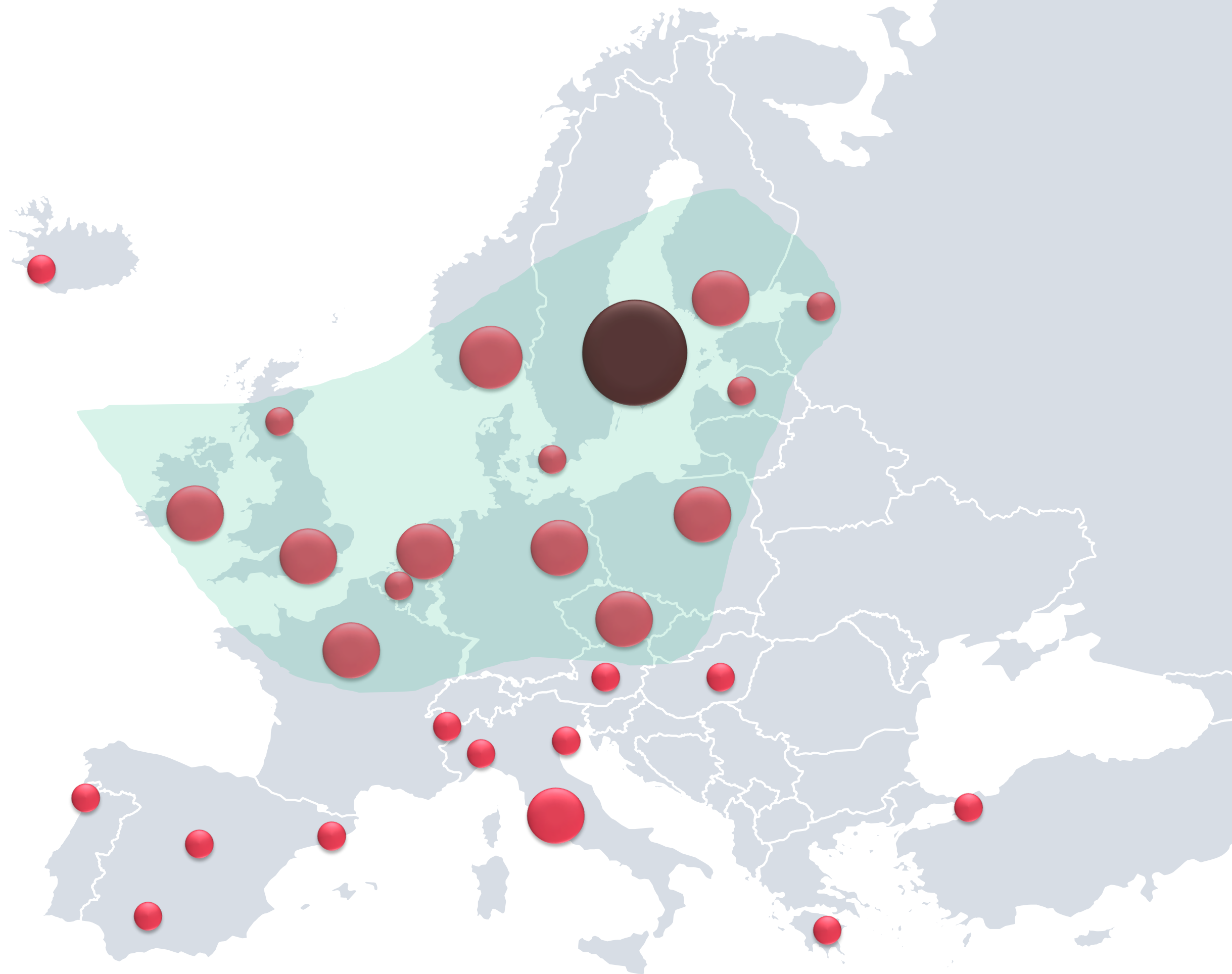
Milan

Porto

Moscow

Istanbul

Munich



Each city's rating is indicated by the size of its associated circle

FOCUS ON LONG-HAUL MARKETS

A Northern European competitive set

For long-haul markets, Copenhagen is mainly considered as **an alternative to other Northern/Western European cities** (with the exception of Rome). Once again, **Stockholm is the main competitor.**

Well-known as well as less known cities in South and East of Europe can also be perceived as competitors in travelers’ decision making process.

Destinations visited instead of Copenhagen

Cities visited while Copenhagen was on travelers' consideration list

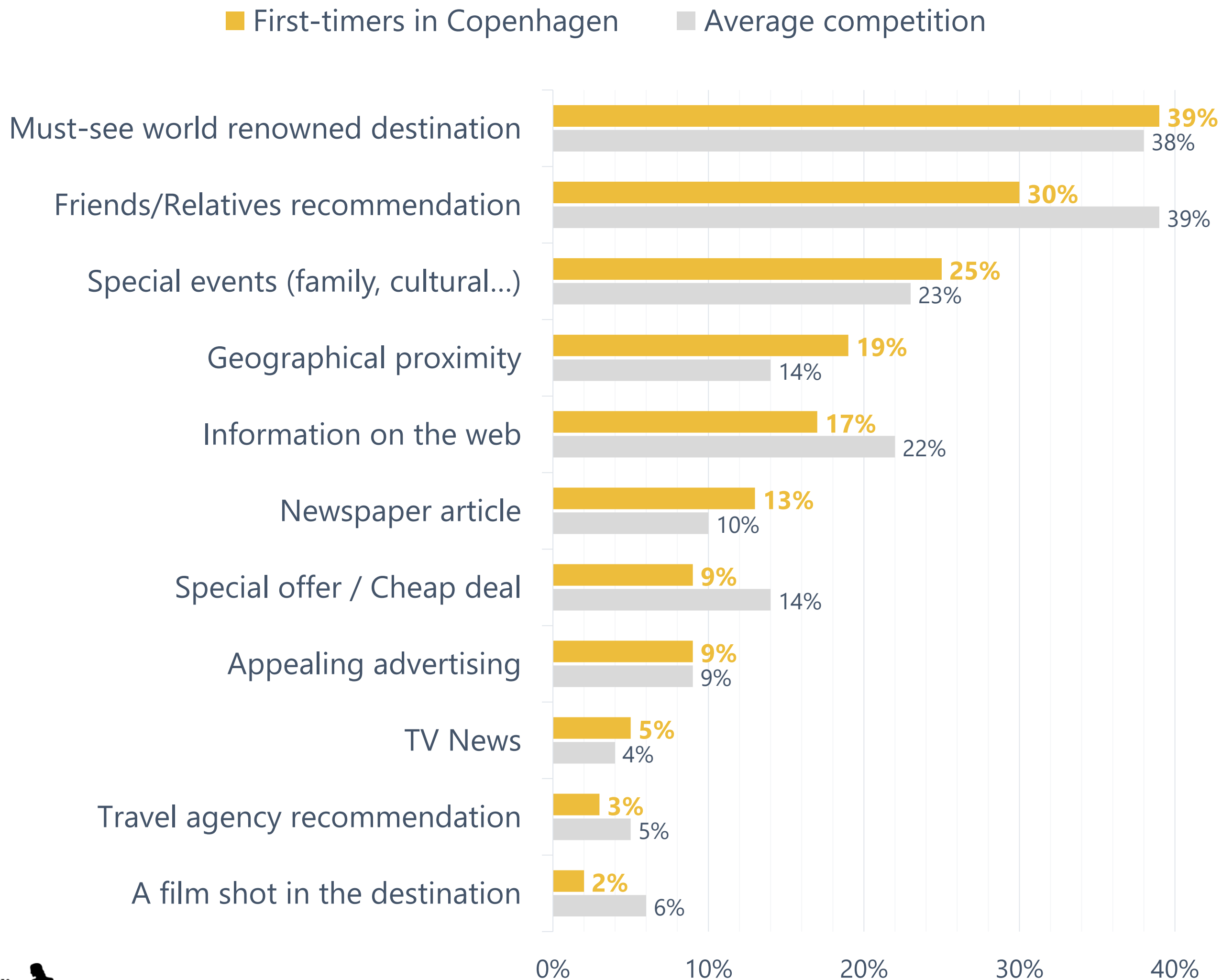


Stockholm and Berlin confirmed as the absolute TOP rivals

Copenhagen faces the challenge of being **rivalled by two of the European "heavyweights"** (Stockholm and Berlin), and a **multitude of well-known cities and newcomers**, which are able to attract potential visitors.

What prompts first-timers to chose Copenhagen?

What mostly prompted your decision to chose this destination ? (n=257)



46% of the respondents visited Copenhagen for the first time. Travelers visiting Copenhagen for the first time are mostly driven by a wish to see a **world renowned must-see destination and by a positive word-of-mouth** effect, though the latter has a slightly lower influence when choosing Copenhagen compared to the average norm.

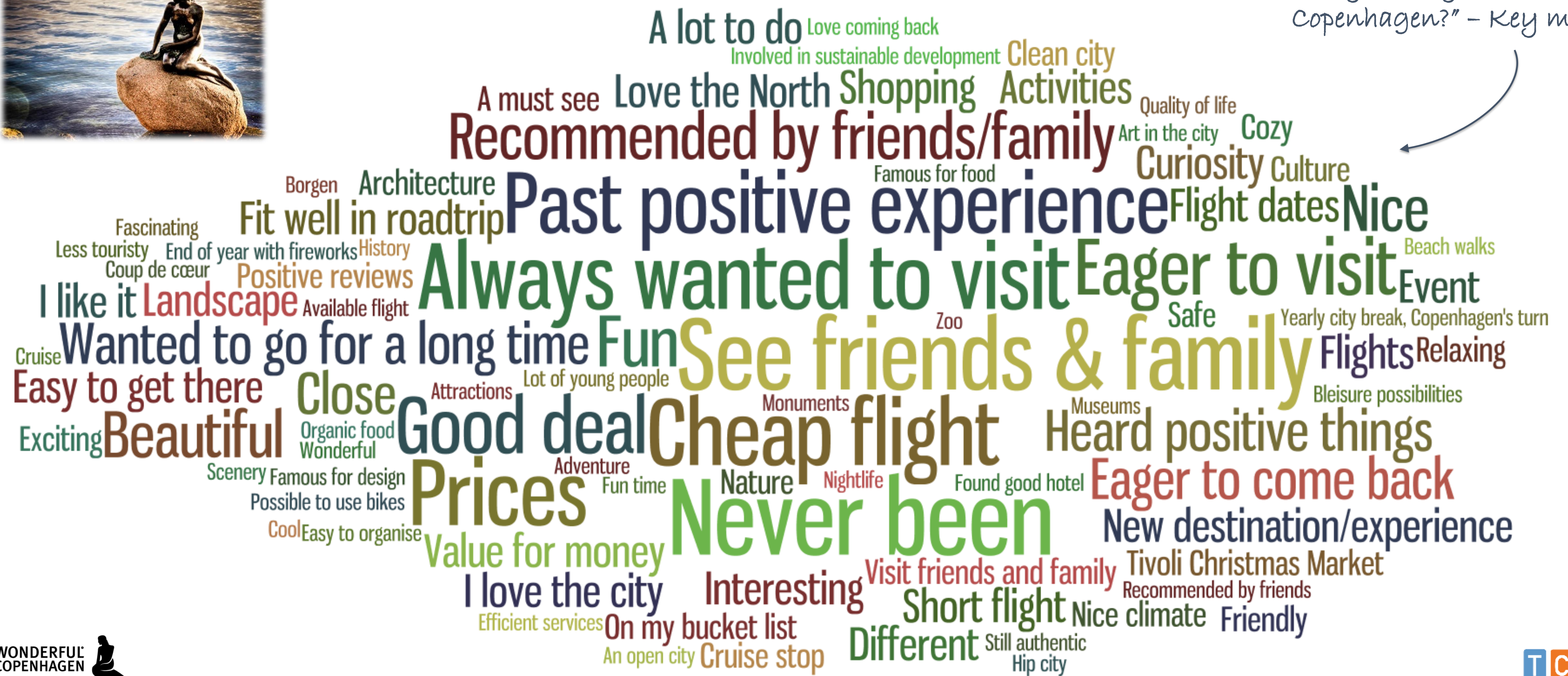
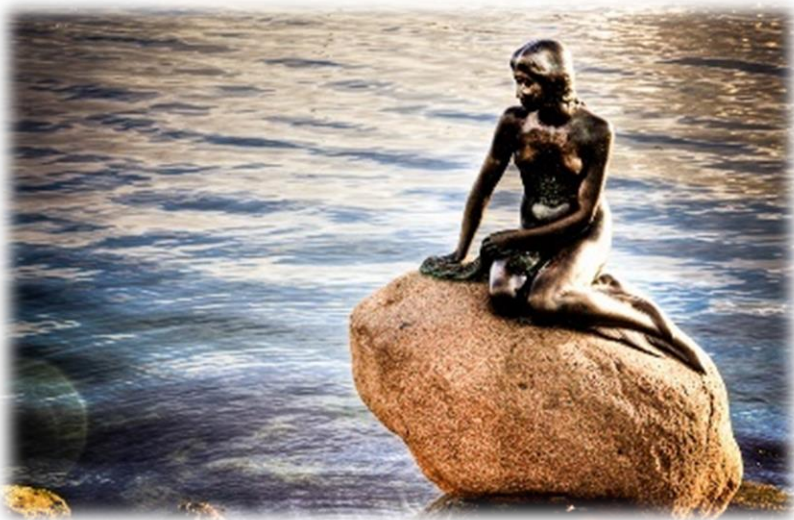
Special **events and geographical proximity** were also important drivers for choosing Copenhagen.

Information on the web is influential as well, but for Copenhagen, the **influence of web information is lower than the average norm**, which should be taken into account in future strategies.

Why did tourist finally choose to visit Copenhagen?

A well-balanced combination of established rationales and emotional triggers, based on various positive attributes of the city brand (shopping, architecture, culture, art, food, environment, fun, activities ect.) combined with practical reasons (proximity, price and convenience for visiting).

"Why did you finally chose Copenhagen?" - Key mentions



Competitive Benchmarking

Mapping the *Best Performers* in Copenhagen's competitive set



TRAVELSAT[®] Competitive Index

Introducing the survey methodology



The Global Standard

For benchmarking visitor experience

Why benchmarking your visitor experience is focal!

Brand experience



Prompts for choosing a destination

TRAVELSAT[®] Competitive Index is **the global independent UNWTO endorsed standard** for measuring visitor **experience quality**.

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

TRAVELSAT[®] 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 and national Tourism Boards and DMOs in Europe, the Caribbean, North America, the Middle East, the Indian Ocean and the Asia Pacific region.



60+ indexes on the whole visitor experience

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



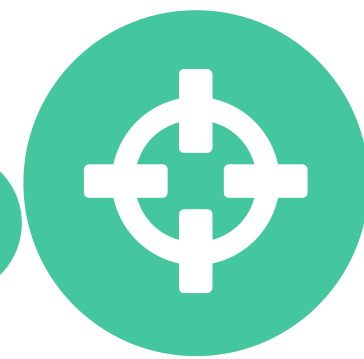
Unrivalled competitive benchmarking options

Based on geographical markets, travel segmentation and geo-topic norms (cultural explorers, business/MICE, millennials, families, city breakers ect.)



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.



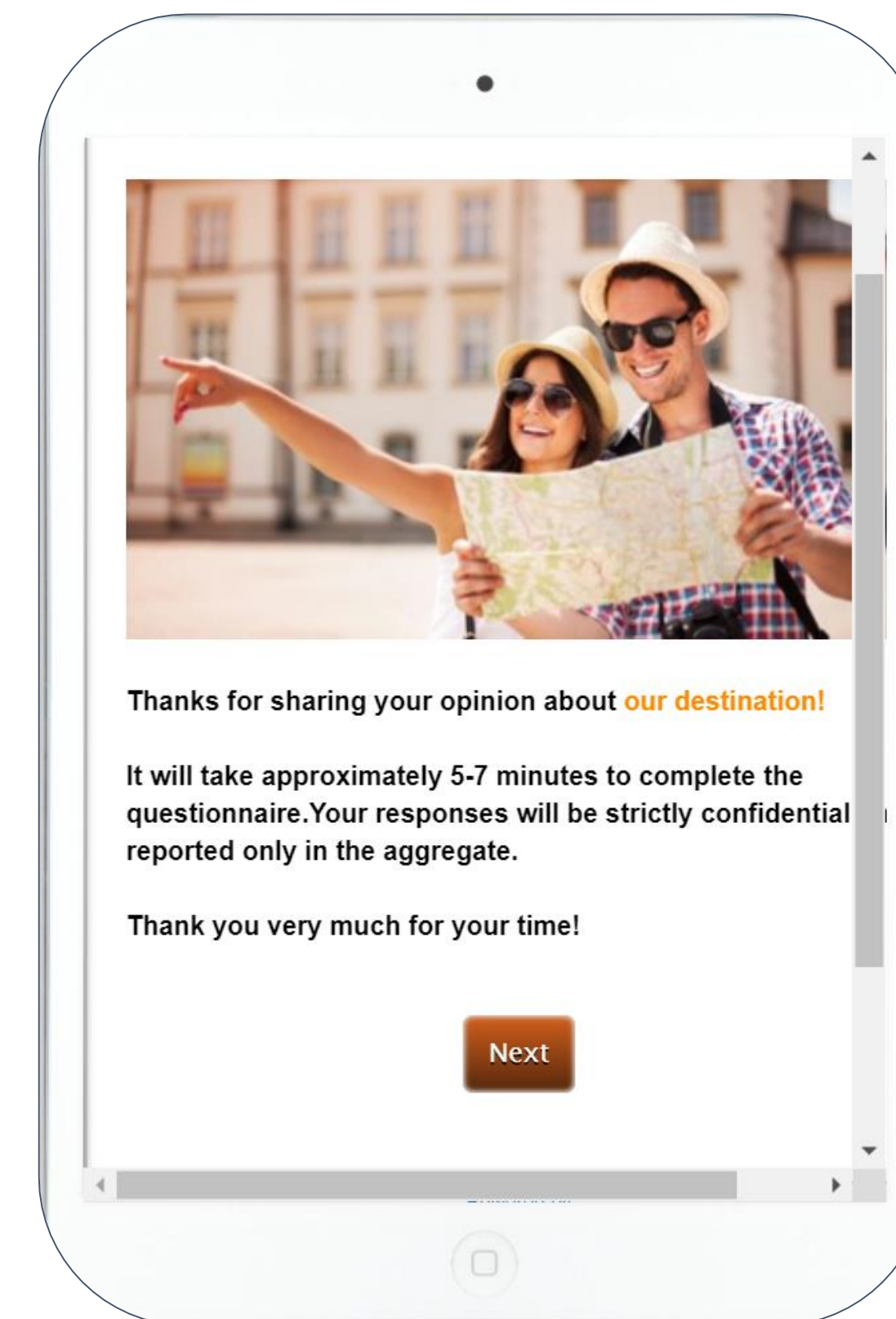
Recruitment at destination

- 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.



TRAVELSAT© Index Definition

A benchmarking measurement



TRAVELSAT© applies a standard proprietary scoring from the 1 to 10 satisfaction rating scale used in the questionnaire.



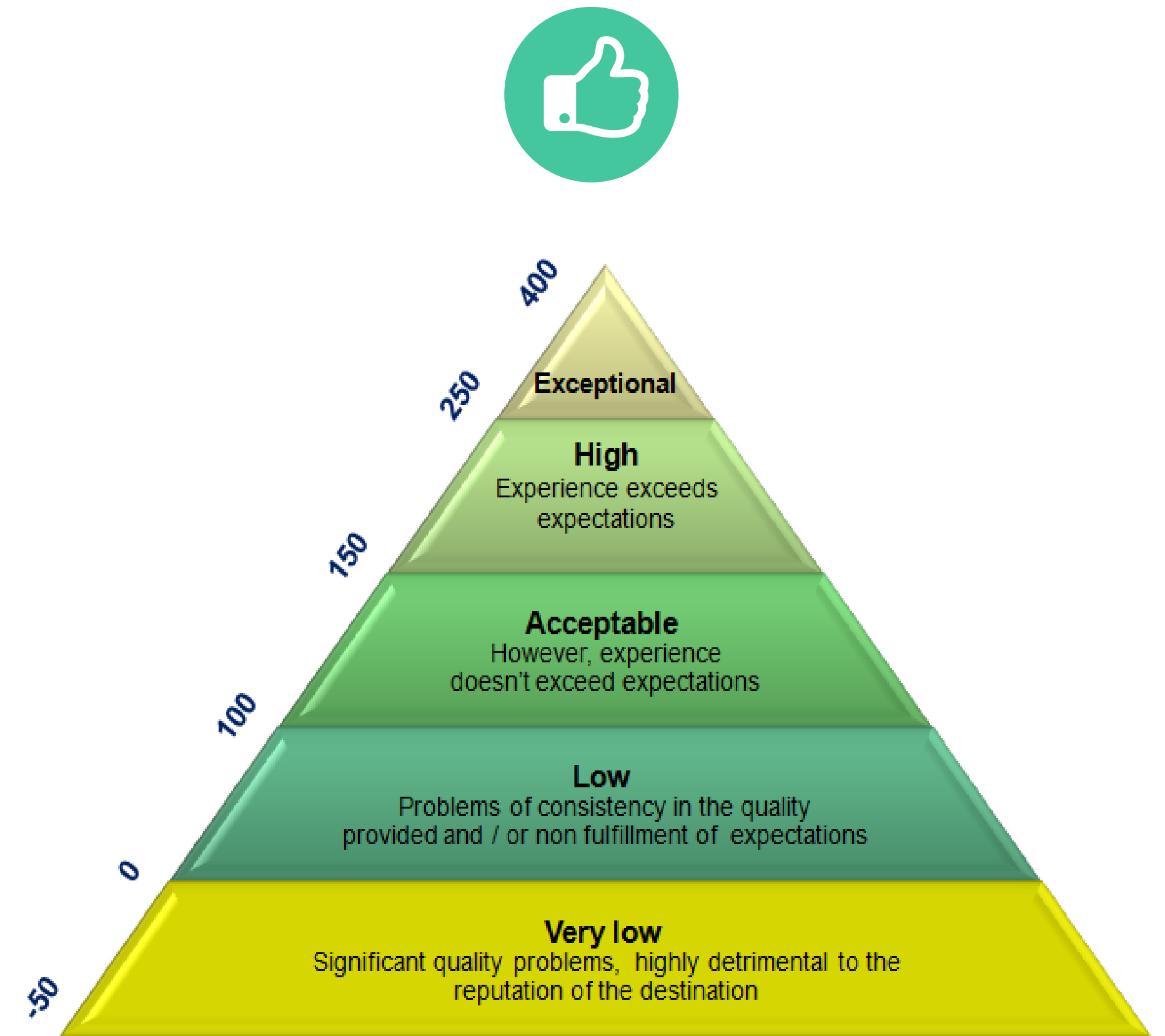
The index reflects the level satisfaction for each criteria rated and fluctuates from -50 to 400.



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.



The primary purpose of the index is to benchmark destinations' experience quality compared to the average norms and competition.

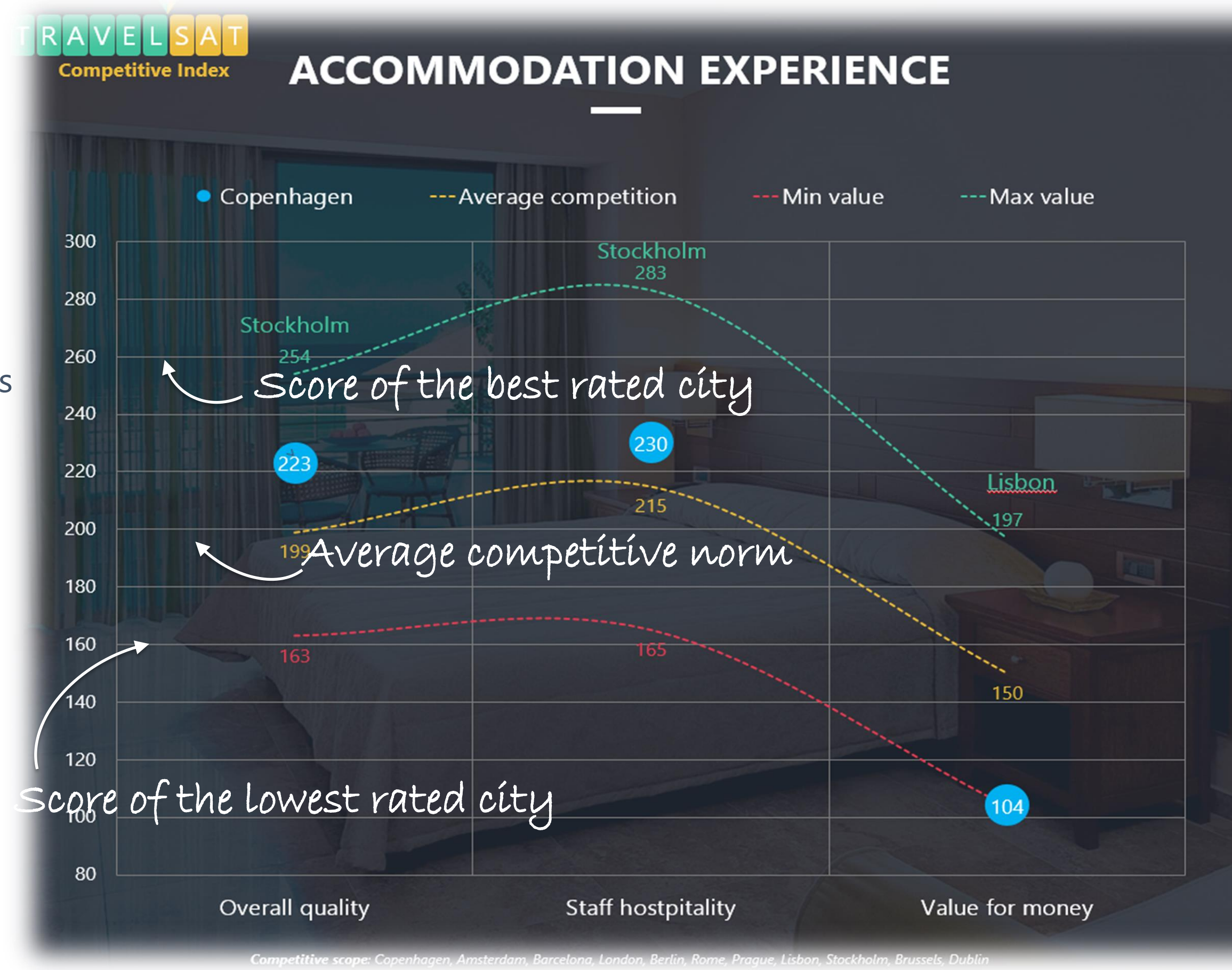




Custom Analytic Scope for Copenhagen

Special "Best-in-class" analysis

- **Target:** International visitors (at least 1 night, all markets consolidated, all purposes of visit).
- **Travel period consolidated:** 2016-2017, all seasons.
- **Sample size :** 556 interviews. *A gap of 15 points indicate a significant competitive difference.*
- **Indexes are weighted** based on reference statistics to reflect market shares and seasonality patterns.
- **Competitive set:** Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels and Dublin (4000+ interviews).
- **Selection criteria:** The competition mapping has formed the basis of the selection of 10 benchmark destinations. However, the following criteria have also been taken into consideration in the selection of the benchmark set from the competitor mapping:
 - Representation of competitors, which are spread geographically.
 - Representation of well known competitors and new, emerging competitors.
 - Representation of competitors in terms of second time-visitors.



The Visitor Experience Journey



TRAVELSAT

Competitive Index

ACCOMMODATION EXPERIENCE



Copenhagen's accommodation quality and hospitality reach **excellent and highly competitive levels** when rated by guests,

However, the rating of **value for money perceptions remains low**. This is an area where Lisbon excels.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

FOOD EXPERIENCE

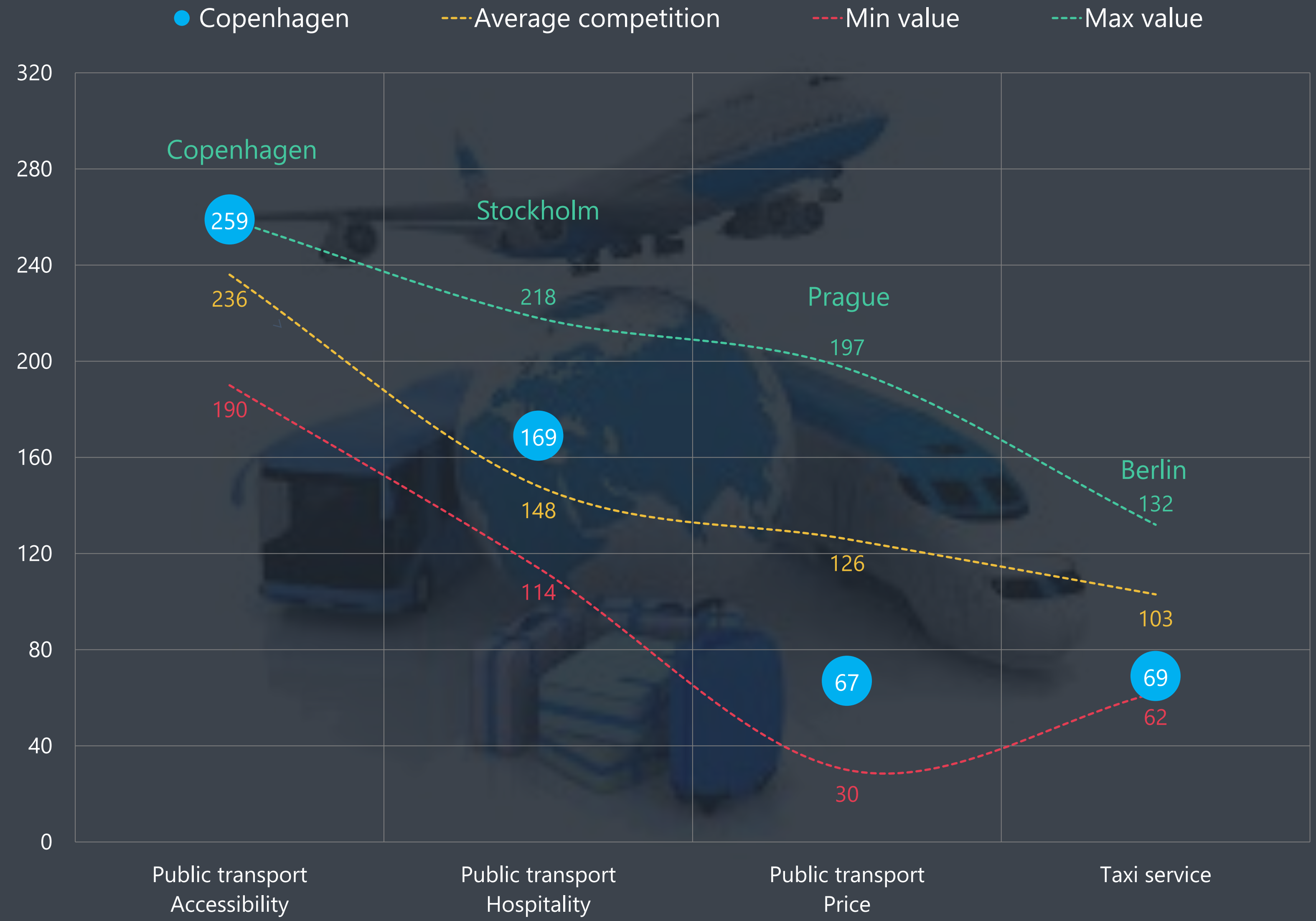


The **overall quality** of the food experience and the **staff hospitality** in restaurants receive **competitive ratings**.

Nevertheless both **diversity** and (above all) **value for money** perceptions are **challenged by Southern European cities**.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

PUBLIC TRANSPORT & TAXI

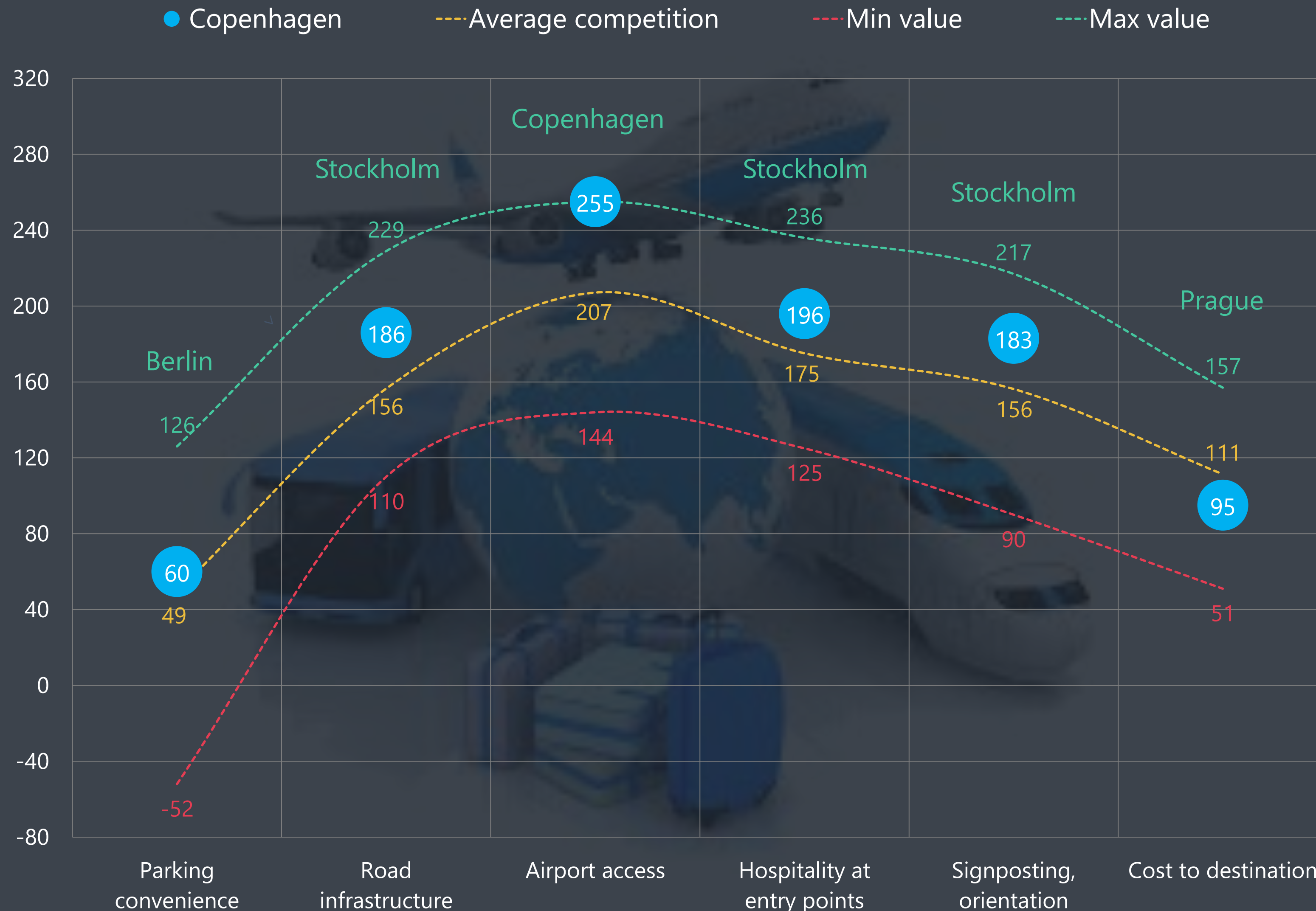


Copenhagen is **best-in-class in terms of access to public transportation** and offers competitive hospitality from agents in the transport sector.

Public transport prices and taxi service are rated below the norms.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

TRANSPORTATION INFRASTRUCTURE



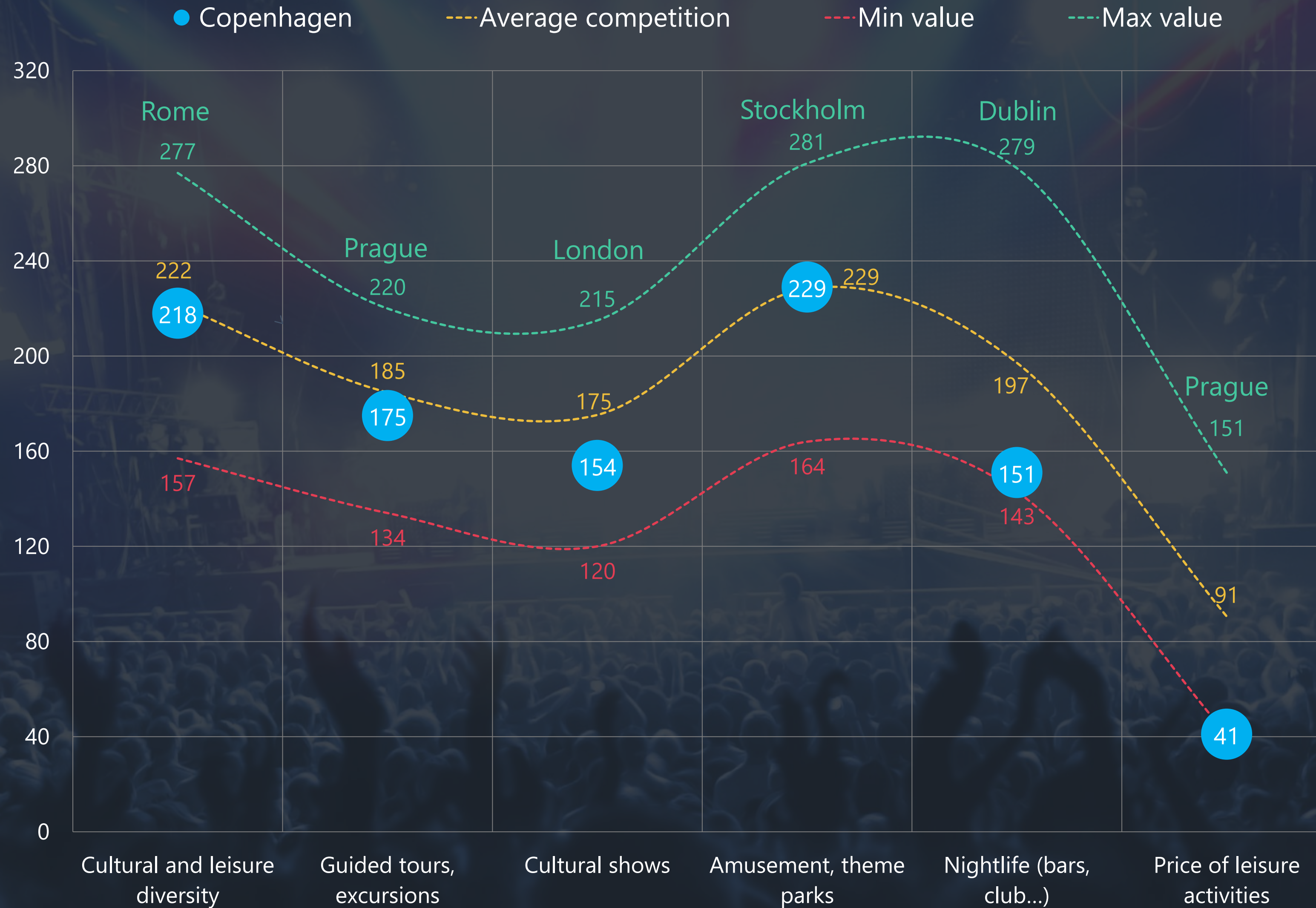
All facets of the transportation experience and infrastructure receive **competitive ratings**.

Copenhagen is best-in-class with regard to **airport access**.

On the overall transportation experience, **Stockholm is established as a tough rival** offering consistent quality along the journey.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

CULTURE AND LEISURE ACTIVITIES



Copenhagen **matches the average competition** when looking at the overall diversity and quality of activities provided to visitors, but it suffers from **two competitive weaknesses**: the *nightlife* and the *price of leisure activities*.

HISTORICAL SITES AND MUSEUMS

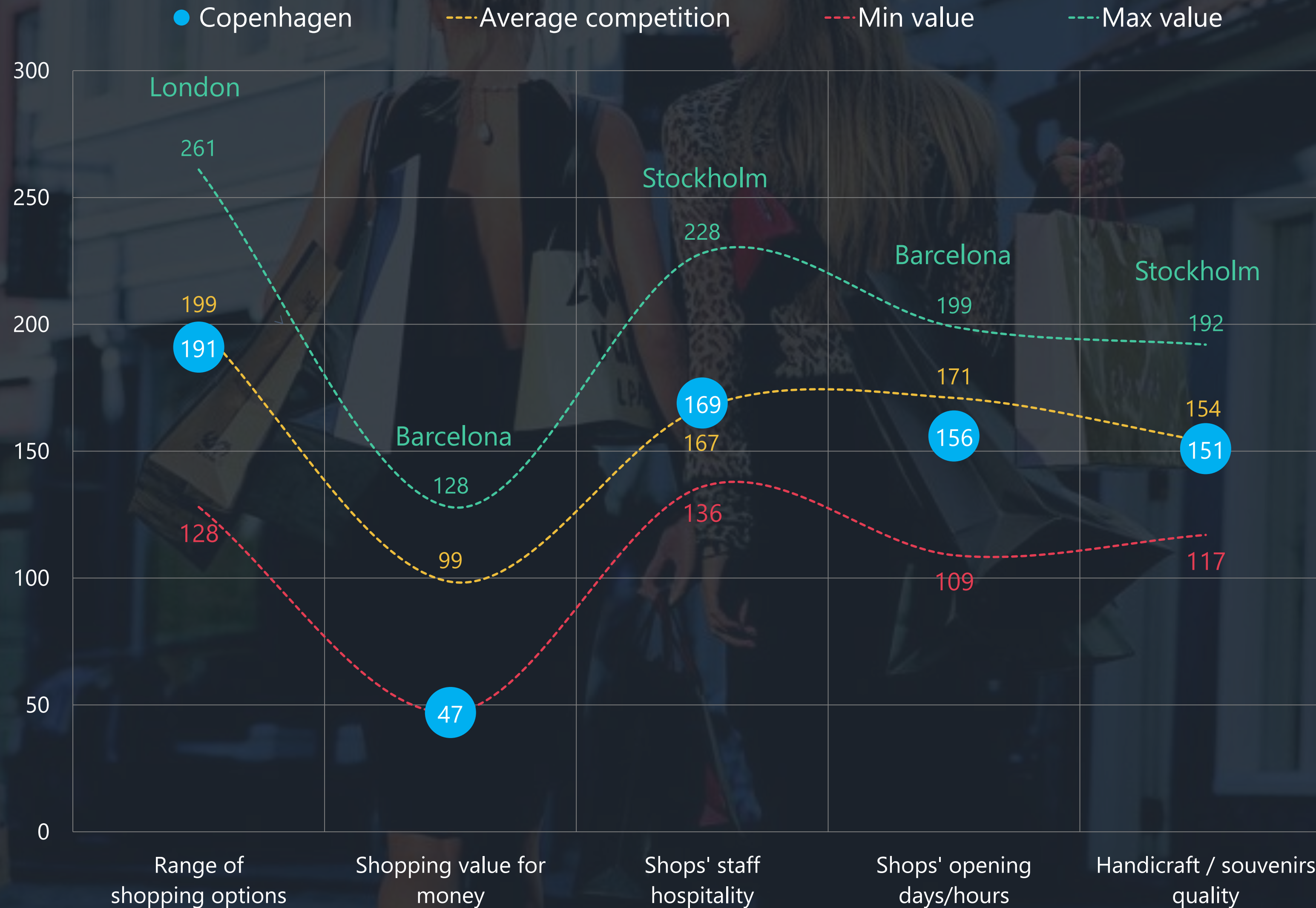


Data indicates that **international visitors expect a wider diversity of historical heritage sites** when exploring Copenhagen, compared to what they typically experience in a European city.

However, the **convenience for visiting** cultural heritage sites is rated best-in-class.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

SHOPPING EXPERIENCE



Many aspects of the **shopping experience in Copenhagen match the competitive averages**, but various cities manage to offer better experiences within each category.

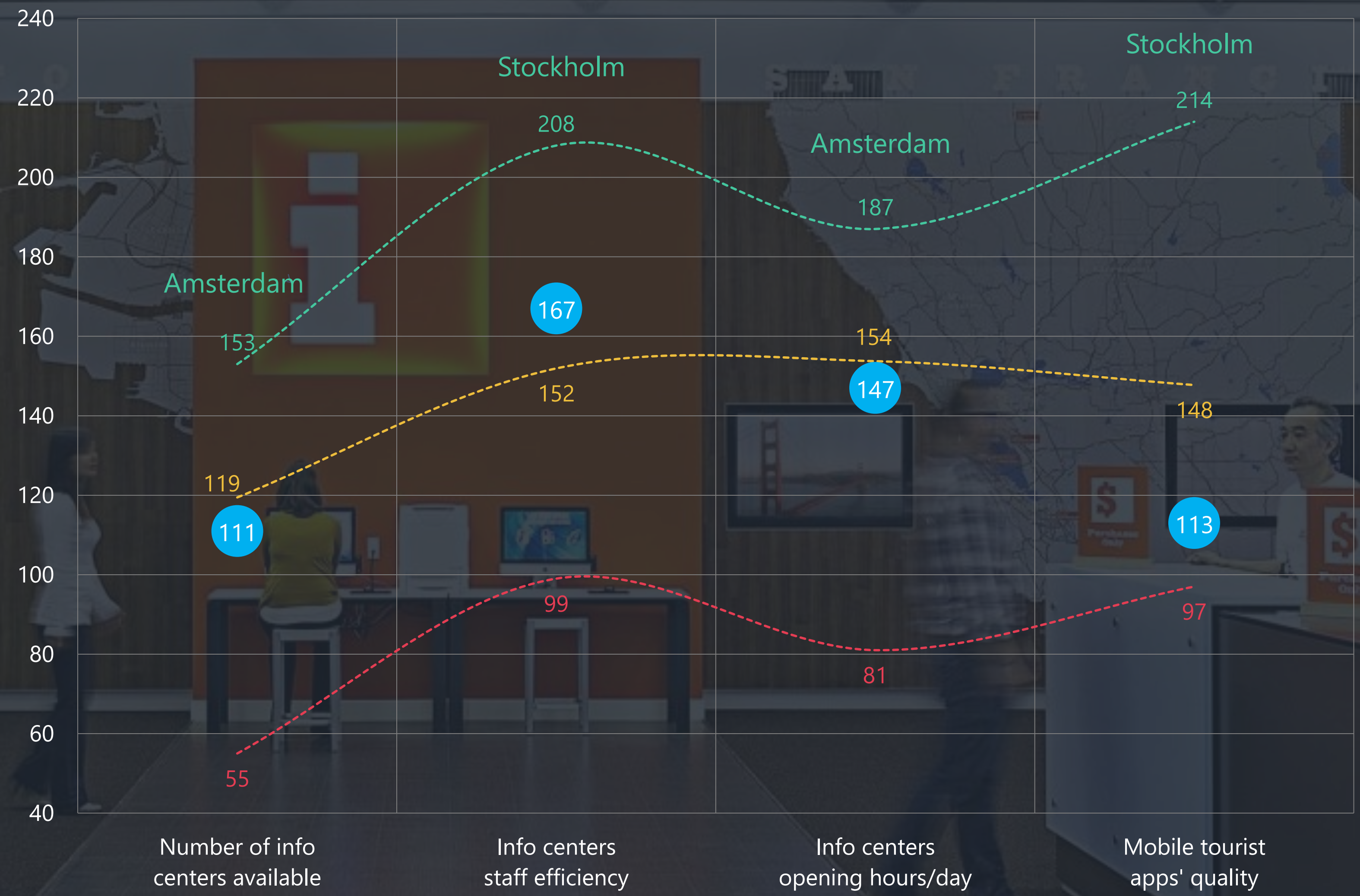
Nonetheless, the **low rating of value for money** in terms of shopping remains significant.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

VISITOR INFORMATION & ASSISTANCE



● Copenhagen - - - Average competition - - - Min value - - - Max value

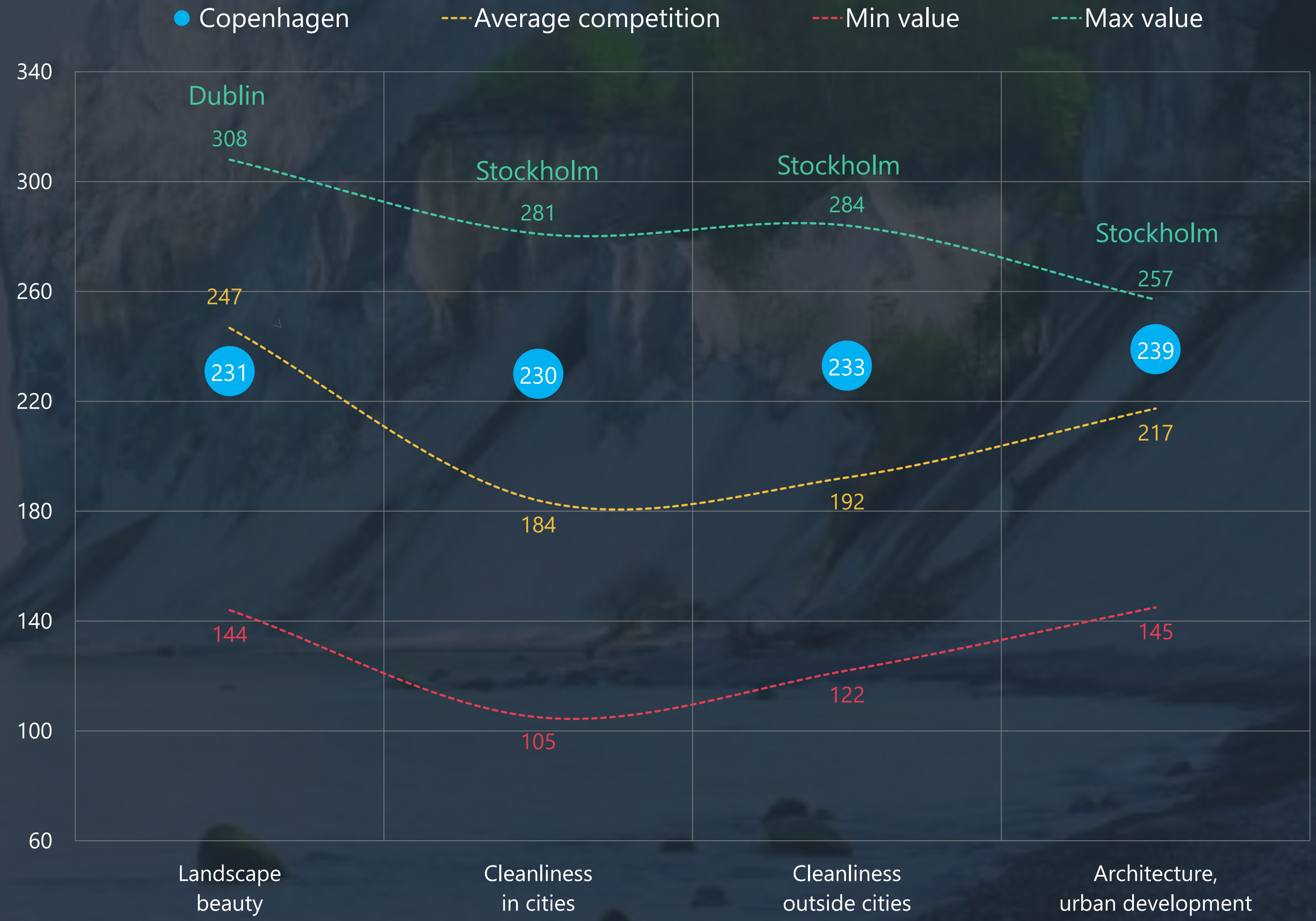


The **visitor assistance** delivered in information centers **is competitive**, though Amsterdam and Stockholm tend to lead the experience quality within this area.

Copenhagen receives a very low rating in terms of quality of mobile tourist apps. This is an areas where Stockholm is performing very well.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

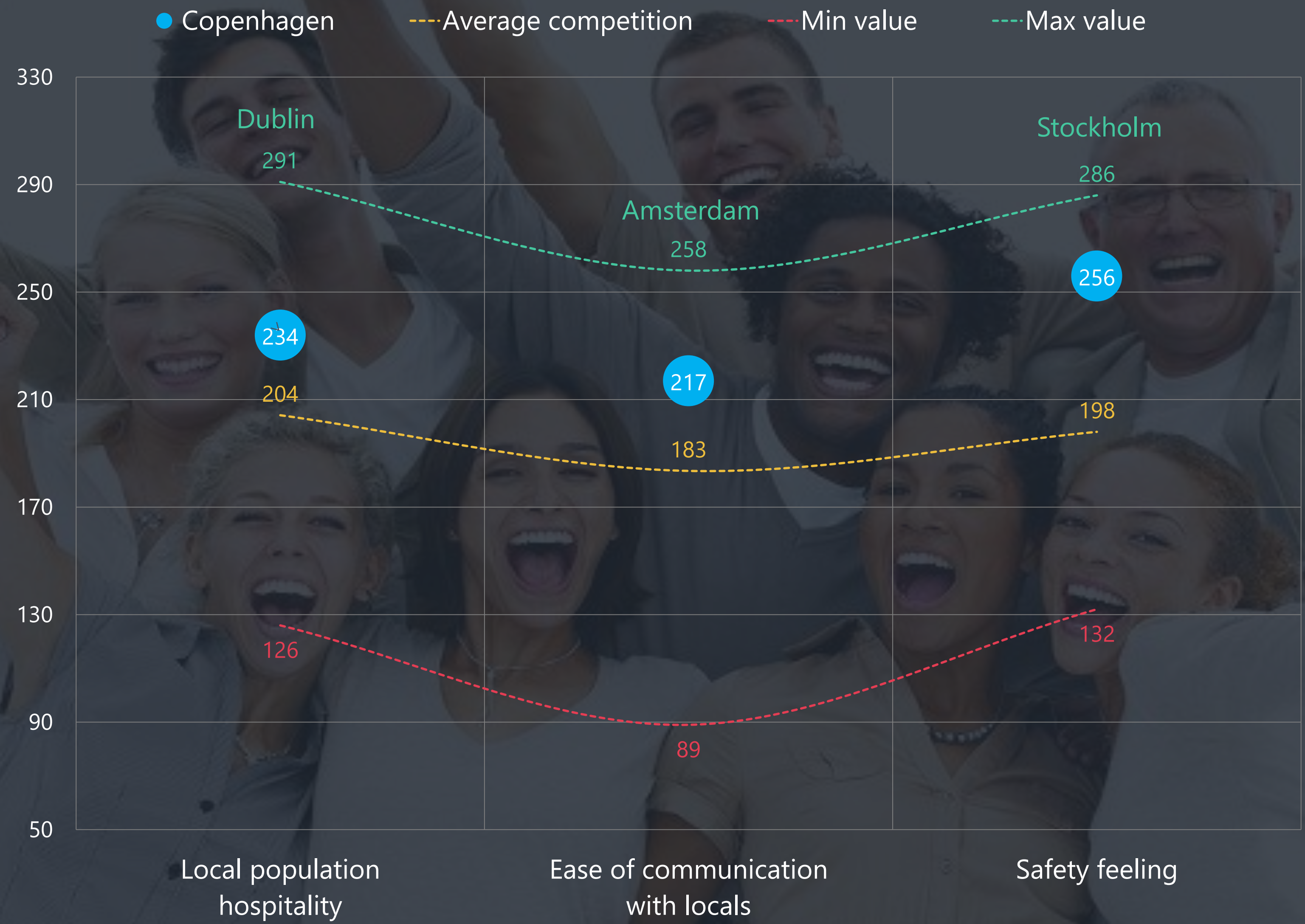
ENVIRONMENT



Copenhagen is above average in terms of **cleanliness in the city, cleanliness** outside the city as well as for **architectural and urban development**, but is surpassed by **Stockholm**, which is **best-in class** within these three areas.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

LOCAL HOSPITALITY, SAFETY FEELING



The contact with local people as well as the feeling of security are **competitive assets for Copenhagen.**


This asset must be maintained preciously since both locals' hospitality and the feeling of safety in the city are **the most influential criteria of destination story-telling.**

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

Transverse Analysis



Key Competitive Indexes

	Overall fulfilment of expectations	Overall stay value for money	Intention to recommend (net %)	Intention to repeat visit (net %)
COPENHAGEN	189 !	103 !	73% !*	44%* 
<i>AVERAGE COMPETITION</i>	<i>200</i>	<i>153</i>	<i>77%</i>	<i>41%</i>
<i>MAX VALUE</i>	<i>248 (Stockholm)</i>	<i>203 (Lisbon)</i>	<i>85% (Prague)</i>	<i>54% (Prague)</i>
<i>MIN VALUE</i>	<i>142</i>	<i>103</i>	<i>68%</i>	<i>28%</i>



Copenhagen is **performing fairly well** in terms of fulfilling the overall expectations of its visitors. However, Copenhagen **struggles to reach competitive levels for the value for money perceptions** of the overall stay, particularly when Copenhagen is compared to the Southern / Eastern European Cities.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

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

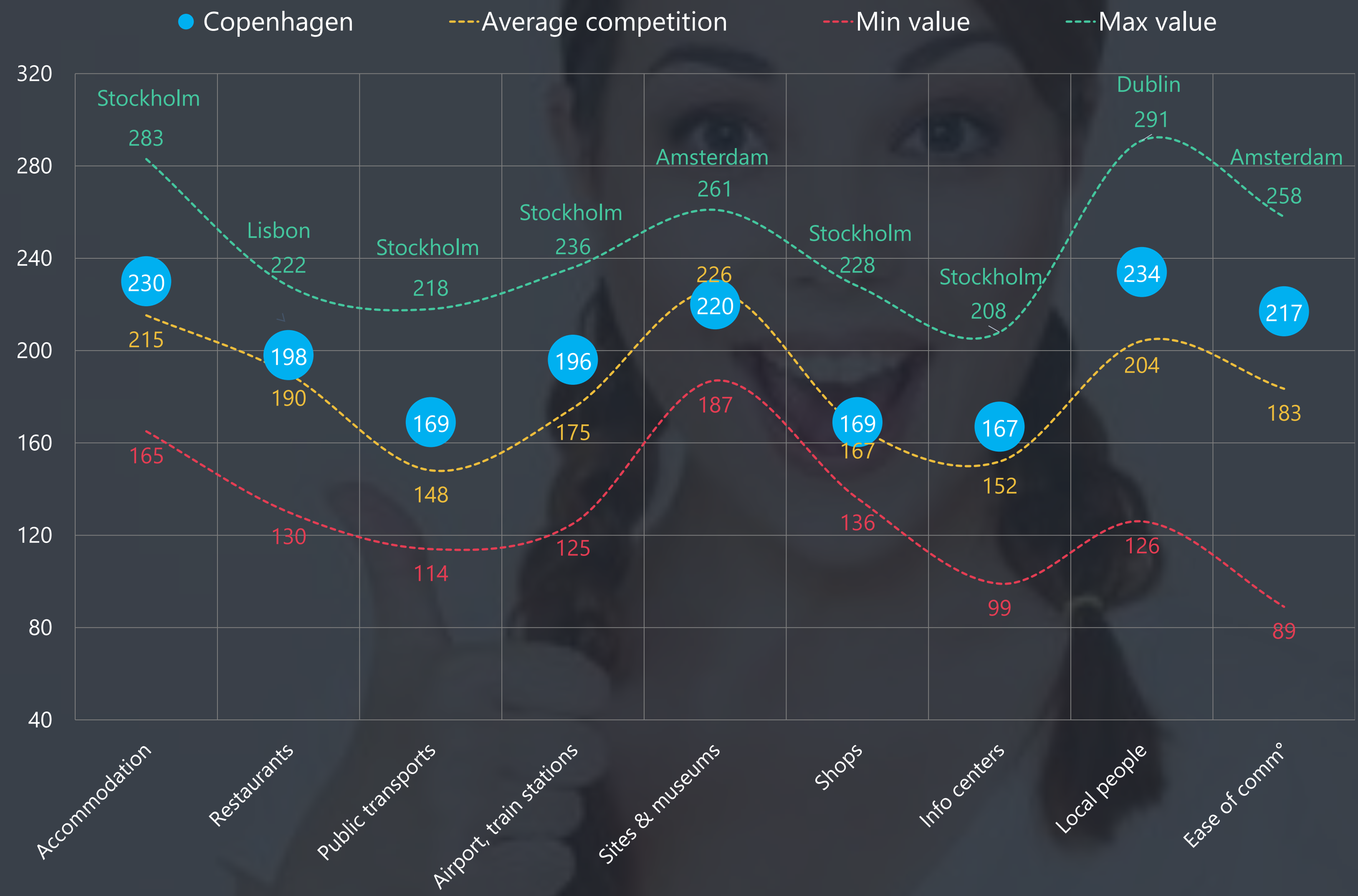
PRICE / VALUE FOR MONEY CHAIN



The challenge observed with value for money perceptions of the overall stay is not caused by travel cost to the destination or a poor level of hospitality, but rather by the **“cumulated” costly experiences rated in several influential factors:** Accommodation, food, shopping and activities.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

PERSONAL HOSPITALITY CHAIN



Copenhagen delivers a **consistent quality of personal contact all along the visitor journey**, with no “broken part” in the chain to be reported.

However, it is also within this **important non-paying field of the experience** that two of Copenhagen’s toughest rivals - **Stockholm and Amsterdam** – have built a **competitive advantage**.

Competitive scope: Copenhagen, Amsterdam, Barcelona, London, Berlin, Rome, Prague, Lisbon, Stockholm, Brussels, Dublin

Competitive Gaps Summary

The Copenhagen Brand Experience

Analysis taking into account the overall competitive situation and the relative importance of each criteria in the total visitor experience



Strengths

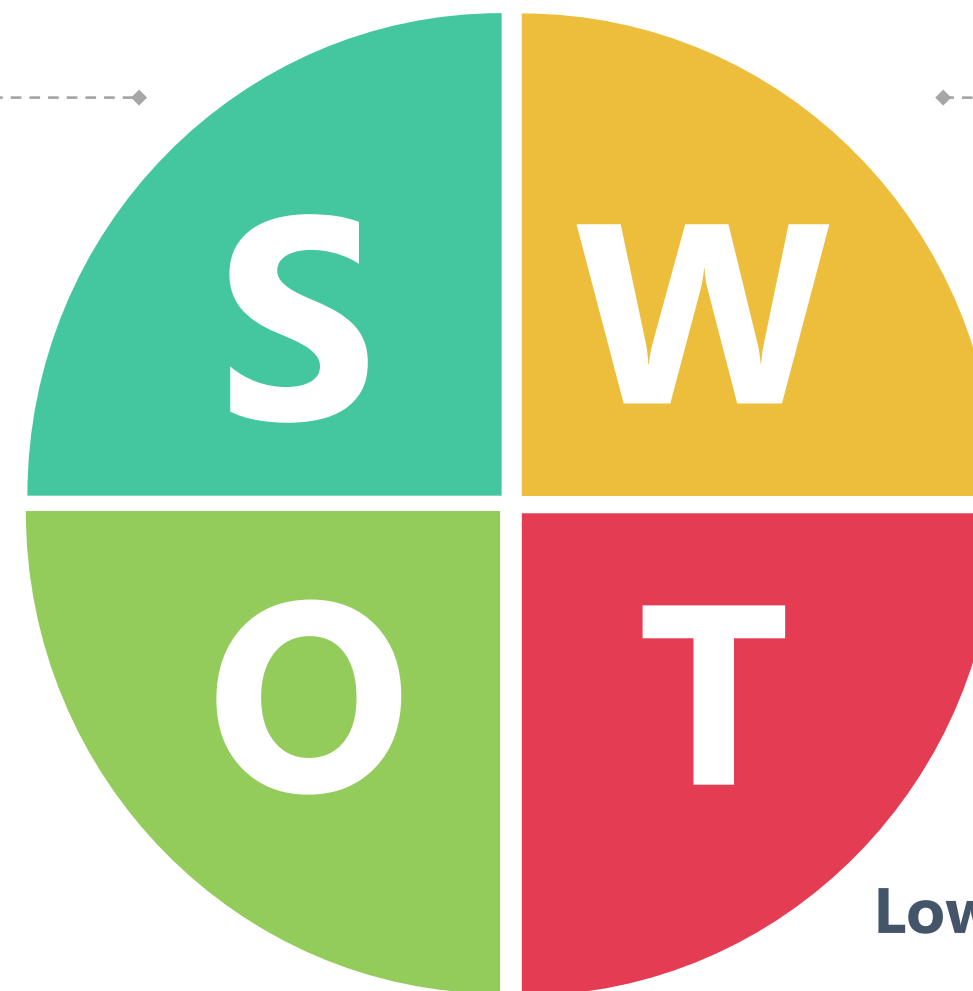
Competitive advantage on important factors

- Hospitable and easy contact with locals
- Accommodation quality
- Public transportation accessibility and hospitality
- Airport access
- Clean and safe experience



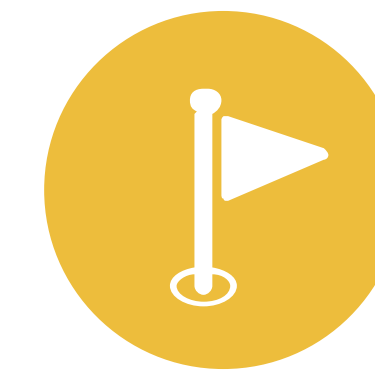
Opportunities of differentiation

- Enhancing the historical sites and the museum experience
- Combining architectural experiences with other experiences
- No feeling of over-tourism / great convenience for visiting



Watchlist

To be monitored



- Food diversity
- Cost of public transportation
 - Taxi service
- Mobile apps for tourists

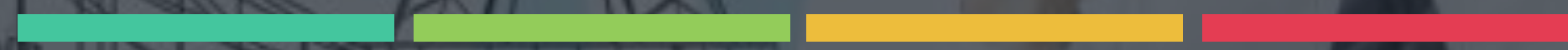
Threats

Low competitiveness on important factors



- Accommodation - value for money
 - Food - value for money
- Shopping - value for money
 - Price of leisure activities
 - Nightlife

Take-aways



Key learning

What data is telling us

34

Facing a multi-faceted competition by improving value for money perceptions

While the set of alternatives considered to Copenhagen comprises various well-known and secondary, geographically spread cities, **the brand experience benchmarking reveals clear-cut competitive strengths and weaknesses.** Compared to other cities, Copenhagen delivers an **architectural**, very **easy-to-move in**, **safe** and **hospitable** city experience, with **no weak points in the quality** provided along the journey.

However, the **value for money perceptions of the overall stay remains the weak point of the destination.** In this respect, **Copenhagen** can not beat the “very cheap yet quality driving” performers like **Prague** or **Lisbon**, and must face direct competitors like **Stockholm** and **Amsterdam** that, according to visitors, offer more to see (including historical attractions and night activities) combined with an outstanding feeling of hospitality in all steps of the journey.

Changing the price-level in Copenhagen is not an option and other non-paying influencers of value for money perceptions (safety, local contact, environment) are already highly competitive in the Danish Capital.

Therefore, it is recommended that Copenhagen **investigates all additional elements influencing the value for money perceptions** including: more *immersive experiences*, more *combined / blended products* such as local food combined with culture- or design experiences staged in amazing architectural venues or organized in areas offering a unique “sense of place” and atmosphere.

Last but not least, Copenhagen’s excellent score measured for the **convenience of visiting** (*crowds, waiting time...*) is becoming a major **competitive differentiator**, since visitors are becoming increasingly **sensitive to over-tourism** when choosing a destination.



TCI Research at-a-glance

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

We are a global leader in destination competitive analysis.

Our standpoint is international.

Our methodologies are endorsed and awarded by reputable tourism organizations.

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

Our team is senior and highly flexible.



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