10XCOPENHAGEN
A research project

»2030

Summary and recommendations by Wonderful Copenhagen

WONDERFUL COPENHAGEN

10XCOPENHAGEN

Life in cities has fundamentally changed over the past years. And it will continue to change as new technologies are implemented to further optimize the overall quality of local urban lives. At the same time, life in cities is not lived by locals alone, but also by a growing number of temporary locals. By 2030, UNWTO predicts 1.8 billion international tourist arrivals worldwide with Europe as the continued lead in receiving tourists. This development is also seen in the Capital Region of Copenhagen, where visitor numbers have grown since 2010, contributing today with an annual revenue of almost 42 billion Danish kroner, and creating approximately 49,000 jobs within the region.

10XCOPENHAGEN was initiated as a major research project in October 2017 with the purpose of creating new insights to outline the direction for a competitive tourism development in Copenhagen towards 2030. We need these insights, because only by understanding the drivers and barriers of tourism growth, as well as the impact of tourism on the city, will we be able to foster future growth to the benefit of the city and its locals. The project title is inspired by Google's innovation mindset, where improving something by 10 per cent means you are just doing the same as everyone else, whereas improving something by 10 times (10x) requires new thinking and differentiation from competitors.

Carried out from October 2017 until launched in March 2019, the research of 10XCOPENHAGEN was developed in the midst of a widespread international change of perception of tourism with almost daily reports over the summer of 2018 on overtourism in popular European destinations like Venice, Barcelona and Amsterdam. This project's research includes a substantial focus on the Copenhageners' perception and experience of tourism in their daily lives, in addition to the research on the competitive position of Copenhagen's tourism product as well as the future drivers of tourism growth.

The following pages of this document are the results of Wonderful Copenhagen's summary of the key research results and outline of the direction and recommendations that we see across the total of 9 reports which make up 10XCOPENHAGEN at the time of launch. This summary is based on the results of surveys of more than 5,500 international visitors of which approximately 2,700 visited Copenhagen, the results of 183 street interviews with both international visitors and locals (including a number of street interviews with international visitors in Stockholm), surveys of more than 2,000 local Copenhageners as well as 9 focus groups & workshops with local residents and businesses of different neighborhoods, urban planners and tourism professionals, 8 expert interviews and the results of benchmarks with international visitors to 10 strong European competitor destinations (based on 4,000+ interviews) as well as the results of data analysis of more than 20,000 reviews on TripAdvisor, and 720,000 pictures from Copenhagen and Stockholm on Instagram and extensive database forecast analysis. In short, summarizing the research results of 10XCOPENHAGEN in an incredibly difficult task.

Launching the results of more than one year of research, we now know a whole lot that we did not know before, standing on the most extensive research basis we have had. We are very grateful to be able to share this new knowledge widely to further the tourism development of Copenhagen. This has been made possible with the financial contribution of Arp-Hansen Hotel Group, who has made their contribution contingent upon Wonderful Copenhagen carrying out the project with no special consideration of the interests of Arp-Hansen Hotel Group or other special interests.

With our new knowledge, we now also have even more interesting, new questions to ask. We're making all reports and Wonderful Copenhagen's following recommendations available on www.10xcopenhagen.com, because knowledge is nothing unless used and because we need to move in a new direction towards 2030 together – with all the good ideas and initiative of locals, temporary locals, tourism industry, innovators, urban planners, decision makers and many more.

And, in case you were wondering (our dear Danish readers) why everything is in English, the explanation is twofold: First of all, reciprocity! We learn so much from looking at the knowledge and initiatives from other destinations (our colleagues and competitors) and secondly, because this is not a conversation limited to Copenhagen; we are taking part and further inviting a global conversation on the future of sustainable tourism development in cities and between cities. We want Copenhagen to stand out – but Copenhagen is also part of an eco-system that reaches beyond. We need to share and seek inspiration, experience and ideas both inside and outside our city.

We hope you will be part in this conversation and look forward to discovering your ideas in return!

Happy reading!

Mikkel Aarø-Hansen
Wonderful Copenhagen

MAKE COPENHAGEN GROW

The story of tourism in Copenhagen has been one of growth and success. A continuous increase in the city's bednight numbers, tourism-related jobs, new flight connections to intercontinental source markets, more cruise ships and passengers than ever before and attracting major international conventions and megaevents. All of which are the results of years of hard work and cooperation within and across the broader tourism sector.

In 2019, Copenhagen has been declared the top place to visit by Lonely Planet, and the many years of continued growth is now matched by a massive 49% increase in room capacity by 2021 compared with 2018.

Almost half of the new room capacity is located within the inner- city areas of Copenhagen. This creates ample opportunity for continued tourism growth which can benefit to the whole city. The key to moving forward is to ensure that this growth supports and contributes positively to that which is our livelihood – namely Copenhagen and the essence of that which makes Copenhagen different from anywhere else: our local lives and our city built for people. Growth should be a constructive tool to create change where needed and sustain local lives and values.

Copenhagen's top position in Lonely Planet and past years of tourism growth cannot be taken for granted moving forward. The competitive benchmark of 10XCopenhagen clearly demonstrates that our position is not a given, and our products are lacking behind our strong competitors in both the Nordics and the rest of Europe. We should be aware not to fall for the temptation to draw quick and easy conclusions – this is not a simple a matter of price, currency and taxes, service culture or opening hours. The results point to a much more complex competitive challenge, that reaches across multiple products and efforts and requires us to dig deep, but also to think and act differently. Even Copenhagen's food experience product leaves the average visitor unimpressed, while both locals and the global elite of foodies are celebrating the Copenhagen food scene. Same for our cultural and leisure offers, shopping experiences and even our accommodation experience.
Copenhagen can accommodate further tourism growth, when taking a city-wide perspective, and 81% of Copenhagen's local population supports continued promotion to attract more visitors. At the same time, furthering tourism growth cannot be the sole success criteria of Copenhagen's tourism development. Copenhagen has defined its own way of being a big city in a small scale – one that punches above its weight in both vision and ambition. We need to apply that mentality to tourism and define our own way of tourism success, working towards sustaining growth and long-term competitiveness – on the city's terms and to the benefit of the city and its locals.

This ambition requires long-term priority and commitment from both public and private stakeholders of the city. Tourism should be an integrated part of our city-wide planning for growth, ensuring strong tourism bodies and even stronger city-wide partnerships, working towards a balanced and sustainable tourism development in support of the city's holistic vision and the collective local benefit. This is paramount to ensure a liveable and visitable Copenhagen towards 2030.

RECOMMENDATIONS

1 Make sustainable tourism growth part of Copenhagen's long-term vision and commitment.

2 Ensure strong public-private partnership for sustainable tourism growth and consider new ways of funding tourism development that reflects our collective commitment and leadership in sustainable tourism growth.

3 Develop further insights and understanding of the competitive challenges of Copenhagen's tourism product together with relevant stakeholders.

4 Develop the overall city narrative and brand to be used by both private and public players, centred on Copenhagen's global leadership and local championship of sustainability – across major international events and whenever Copenhagen has special opportunity to gain global attention.

MAKE COPENHAGEN (EVEN) BETTER

With a little more than 8 million bednights in Copenhagen in 2018, tourism is a major part of the capital city – both directly and indirectly. This is also supported by the 10XCopenhagen results that underline tourism as a positive catalyst for local pride and for a lively city with plenty of leisure offers, and as a source of localised nuisances, varying in intensity across neighbourhoods and across the year.

81% of Copenhageners support the continued promotion of the city to attract more visitors and 67% of locals in Copenhagen experience no problems at all related to tourism. Zooming in on Copenhagen's popular city centre area, 53% of the local residents in this area experiene no tourism-related issues throughout the year. However, 15% of the local residents in the city centre area experience tourism-related problems throughout the year and 32% at certain times of the year. 63% of Copenhageners who experience problems either all year or at certain times of the year, point to traffic as the biggest issue. Crowdedness as a nuisance – as often associated with the term overtourism - is experienced by 41% of the Copenhageners who experience tourism-related problems.

The intensity of tourism in the inner-city area is clearly reflected in the visitors' mobility patterns, where 87% of visitors indicate that they've been to this particular part of town. In contrast, for example 38% point to Nørrebro, while 29% point to Frederiksberg. 89% of Copenhageners also point to the inner-city as the area where they typically encounter tourists. Again, in contrast with for example 12% in Nørrebro and 17% in Vesterbro. However, 10XCopenhagen research also shows that the impact of heavy use of the city centre area is not only generated by visitors - Copenhageners repeat the same pattern as visitors with 72% of locals responding that they spend spare time in the city centre area and less in the other neighbourhoods.

While other areas are not as heavily affected by tourism as the inner-city, the 10XCopenhagen research results point to an interesting paradox: The strong general local support for tourism to Copenhagen wavers, when tourism gets too close with an average of 38% of locals who feel their own local neighbourhood holds capacity to welcome more visitors. At the same time, the majority of locals recognize the positive impact of tourism on their local area in terms of diversity, trade and urban development.

Locals recognise that tourism makes them proud of their city (83%) and positively impacts local economy (73%), yet the perception of the positive impact of tourism on aspects like culture (62%), infrastructure (44%), local quality of life (25%) and cleanliness (22%) demonstrates a much more complex view of the value added. This complexity calls for a more nuanced and diversified discussion and approach to tourism. As a Copenhagener, overall bednight numbers mean very little to your everyday life, whereas encounters on bike lanes, street noise on worknights as well as the variety of cultural offers and restaurants can directly impact the quality of city life.

Looking at the wish list of Copenhageners for an even better city by 2030, 4 overall themes emerge: better infrastructure, cheaper housing, greener city and more cultural offers. Tourism holds potential to serve as a lever for most of these wishes! Meanwhile, only 39% of Copenhageners wish to be more involved in decisions concerning tourism (and 35% don't wish to be more involved). We need to make tourism locally relevant. Tourism-related issues of traffic and congestion are not a city-wide issue – they are highly localised issues, often concentrated to specific streets or blocks. There is no one initiative that solves all issues across town or that similarly unleashes the full potential of tourism to local communities. Instead we need to empower locals to take part in making tourism work to their advantage, while developing locally viable solutions to the issues experienced.

RECOMMENDATIONS

5 Create a program to develop decentralised tourism strategies and measures of success, co-created between local community, local industry, city and tourism developers. Address more aspects of the value creation of tourism – with relevance and direct impact on local lives.

6 Make channels available for Copenhageners to identify and voice tourism-related issues and opportunities on an ongoing basis.

7 Establish a task force to address top locations or aspects of the locals' experience of tourism-related traffic issues.

MAKE COPENHAGEN EXPAND

Images of the iconic Nyhavn harbour side and other famous historic attractions in the inner-city area often dominate the experiences reviewed, pictures shared, and recommendations given. With good reason, as this area is a gem of both history and culture, yet Copenhagen has much more to offer a broader variety of travellers with all kinds of interests.

Copenhagen's local atmosphere was a key motivation for 62% of visitors, and visitors indicate that they always try to seek out hidden gems, where locals themselves hang out. This does not, however, reflect in a higher mobility visitor behaviour across town, as most visitors continue to spend most of their time in the inner-city area. One of the reasons that 10XCopenhagen points to is that the information broadly available and recommendations given by both locals and hospitality professionals point visitors to this limited inner- city geography. There is a strong perceived and articulated idea that the inner-city is rich on attractions and other neighbourhoods are rich on everyday life. Those visitors who do venture beyond the boundaries of the old town, return with a somewhat diffuse experience of those areas, not sure where to go and what to do.

Good initiatives have been launched to make other parts of the city more accessible and visible, but the challenge appears bigger than anticipated (also because locals themselves stand out as part of the concentration issues of inner-city Copenhagen). Therefore, the challenge also needs to be addressed not just with alternative offerings and niche recommendations, but with a fundamental shift in how we define 'attraction' and how we customise our recommendations to visitors – through official channels and through enabling more personal encounters, as well as how we incentivise initiatives that spotlight Copenhagen's attraction beyond the highly popular, highly visible Nyhavn.

The potential is there! While famous attractions are the key characteristics of Copenhagen in the minds of travellers before visiting (34%), visitors leave Copenhagen with a stronger impression of the city's many bicycles (44%) and Danish architecture and design (26%) with only 17% highlighting famous attractions after visiting. This is across all travellers, while specific traveller segments demonstrate this change of association even more (see Make Copenhagen Inspire).

The simple response to the visitor concentration is 'spreading tourism' – a response supported by 77% of Copenhageners. And while spreading tourism as a strategy has been criticised, among others because it's not considered in the interest of the visitors, 10XCopenhagen research show that the satisfaction level of visitors increased with the number of neighbourhoods visited during their stay. Furthermore, 80% of visitors are interested in combining the city with country- side experiences.

Spreading as a strategy is, however, not an easy fix nor a question of marketing only. It requires strategic planning, accessibility, visibility and readiness to receive visitors to make tourism work as a catalyst for new, less visited areas both inside the city centre, other neighbourhoods of the city as well as for areas outside the city to flourish.

RECOMMENDATIONS

8 Include sustainable tourism growth as a relevant element in urban planning, as well as a positive tool to strengthen the appeal of more city areas and neighbourhoods to locals and visitors alike.

9 Consider news ways to incentivise investment and initiative that spotlight Copenhagen as an attractive destination beyond the centre of the city.

10 Develop visibility and visitability of attractions outside inner-city area, using lighthouse strategy to make experiences around attractions more accessible to visitors.

11 Enable better, broader and more personal recommendations where credibility and opportunity exist (within hospitality, events, transportation etc).

MAKE COPENHAGEN INSPIRE

Let it be clear that visitors leave Copenhagen with a good impression. 81% of visitors feel their stay in Copenhagen has lived up to expectations and 75% find it is likely or very likely that they will visit Copenhagen again. Furthermore, 49% would highly recommend Copenhagen to family and friends and return home as ambassadors of our city.

In addition, visitors' encounters with Copenhageners also leave them with a positive impression, describing Copenhageners as friendly (58%) and accommodating (46%). Interestingly, Copenhageners describe themselves as self-centred (28%), but luckily only 5% of visitors leave with this impression.

The majority of locals (57%) also indicate that their encounter with visitors is positive and only 7% find the encounter mostly or entirely negative.

However, the impression left by visitors on local Copenhageners is not entirely positive, largely due to a clash of expected and perceived visitor behaviour. Locals point to taking care of the environment, spreading out to different neighbourhoods and making an effort to adhere to local customs as the most wished-for visitor behaviours. In contrast, the visitor behaviour that locals observe least from visitors includes taking care of the environment, not disturbing locals and spreading out in different neighbourhoods.

The qualitative research of 10XCopenhagen indicates that the disappointed behavioural expectations of locals give rise to both positive associations related to 'quality tourism', as well as more negative associations related to 'mass tourism', where 'quality tourism' matches the locals' wished-for visitor behaviour. We need to challenge this pattern of association, as it is important not to simply exclude visitors on a purely associative basis relating to 'easily observed outer characteristics.' Quality should not be related to the individual visitor, but rather to the behaviour exhibited. Behaviour – and how we motivate and influence behaviour – becomes key to ensuring positive encounters.

Based on the data collected in 10XCopenhagen, an experiment of behavioural segmentation was carried out. The experiment has been limited to two overall aspects: 1) perceived sustainable behaviour of the visitors and 2) high vs low mobility visitors (as measured by the number of neighbourhoods visited).

The experiment results are preliminary, yet exciting: Firstly, segmenting on perceived sustainable behaviour (across aspects of social, economic and environmental sustainability – to the extent possible in the collected data sets) points to a visitor segment (referred to as 'mindful visitors') that matches local expectations of placing more importance on adhering to local customs, consumption to benefit local community and responsibility to local environment – but also with more focus on the destination's own commitment to the environment. While famous attractions weigh heavily as travel motivation for both the mindful visitor and all other visitors (48% and 32% respectively) before visiting Copenhagen, the two segments demonstrate remarkably different impressions after visiting. For instance, the bicycles of Copenhagen take top position in 72% of the mindful visitors' minds, while only in 39% of all other visitors' minds.

Secondly, the high mobility visitor also ranks bicycles higher than average after visiting (50%), just as the high mobility visitor finds local food more interesting (73%) than the low mobility visitor (61%). The initial behavioural segmentation experiments demonstrate strong potential to move Copenhagen's tourism approach to new levels, especially if combined with data on not only perceived, but actual behaviour while here; potentially moving towards a future, where it is possible to directly, relevantly inspire and enable a more sustainable, city-synergetic behaviour.

RECOMMENDATIONS

12 Use C40 Mayors Summit 2019 as a platform for Copenhagen to push forward the sustainable travel & tourism agenda.

13 Collect more data from visitors and develop further new approaches to behavioural segmentation to both attract and encourage preferred visitor behaviour. Create digital infrastructure and platforms that enable targeting based on actual behaviour – to improve visitor experience and spending, manage and prompt visitor flow and maximize local benefit.

14 Inspire and enable visitor behaviour that sustains and projects the values and ambitions of Copenhagen city and locals.

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TOWARDS 2030