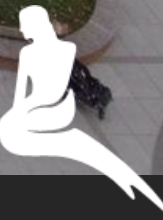


An aerial photograph of a city square in Copenhagen. The square is paved with light-colored tiles and features several circular tree pits with young trees. A large, dark, oval-shaped basketball court is situated in the center-right, with several people playing. In the foreground, there is a large, empty circular paved area. The square is surrounded by multi-story buildings with various architectural styles, including red brick and white facades. The sky is overcast.

# The mindful visitor

An experiment of visitor segmentation based on self-perceived behaviour  
(March 2019)

WONDERFUL  
COPENHAGEN



# TABLE OF CONTENTS

## 1.0 INTRODUCTION, OBJECTIVE AND METHODOLOGY (P. 1)

1.1 INTRODUCTION AND OBJECTIVE (P. 2)

1.2 METHODOLOGY (P. 4)

## 2.0 KEY FINDINGS (P. 7)

## 3.0 DEMOGRAPHICS, TRAVEL MOTIVATIONS AND INFORMATION SOURCES (P. 12)

3.1 DOES NATIONALITY EVEN MATTER? (P. 13)

3.2 INSPIRATION AND INFORMATION (P. 14)

## 4.0 SELF-PERCEIVED SUSTAINABILITY (P. 15)

4.1 SELF-PERCEIVED SOCIAL SUSTAINABILITY (P. 16)

4.2 SELF-PERCEIVED ENVIRONMENTAL SUSTAINABILITY (P. 17)

4.3 SELF-PERCEIVED ECONOMIC SUSTAINABILITY (P. 18)

4.4 ONE TYPE OF SUSTAINABILITY RARELY STANDS ALONE (P. 19)

## 5.0 MATCH OF INTERESTS AND PERCEPTIONS OF COPENHAGEN'S DNA (P. 20)

5.1 WEIGHING THE IMPORTANCE OF CITY BREAK ASPECTS (P. 21)

5.2 COPENHAGEN'S DNA IN THE EYES OF VISITORS (P. 22)

5.3 THE APPEAL OF COPENHAGEN'S CHARACTERISTICS TO POTENTIAL VISITORS (P. 23)

## 6.0 HIGH MOBILITY VISITORS (P. 24)

## 7.0 SUMMARY AND REFLECTION (P. 29)

## 8.0 APPENDIX (P. 31)

# **INTRODUCTION, OBJECTIVE AND METHODOLOGY**



## INTRODUCTION AND OBJECTIVE

This analysis takes point of departure in results from the analytical project 10X Copenhagen, which aims at creating new analytical insights to outline the direction of a competitive and sustainable tourism development in Copenhagen towards 2030. 10X Copenhagen explores both local citizens' (hereafter referred to as locals) and visitors' perspective on how Copenhagen can become a truly world-class destination, that caters for both locals' and visitors' interests, preferences and expectations. A city that allows visitors to experience the local atmosphere in a way that blends in with the locals' use of the city, rather than standing out amongst them.

The city of Copenhagen has had an average yearly increase in bed nights of 7.6% since 2009, where visitors spent around 4.5 million nights in the city, compared to 8.8 million in 2018 – almost double the amount of bed nights in just 10 years.

A capacity study conducted as part of 10X Copenhagen suggests that this development is likely to continue, which means that Copenhagen needs to be prepared to receive more visitors in the future. Recent analyses from 10X Copenhagen have shown that locals appreciate tourism, if it is mindful of the city. A resident sentiment index analysis, for instance, showed that 81% of locals agreed that Copenhagen should continue to be promoted internationally, in order to attract more visitors. Furthermore, the dataset used in this analysis shows that 87% of locals help visitors who, for instance, need directions and 83% of locals say that they feel proud when travellers want to visit their city.

As such, the majority of Copenhageners welcome tourism. However, results from 10X Copenhagen also demonstrate that not all types of tourism are appreciated. Tourism is not appreciated by Copenhageners when it leads to large groups of visitors moving from one top attraction

to the other, ticking off the bucket list, using large tourist busses, which stand out from the locals' use of transportation.

On the other hand, Copenhageners welcome visitors who are mindful of their environmental impact and seek to understand and interact with the locals and their way of living. Locals also appreciate visitors, who spend money in a way which benefits the local community, and visitors who explore more of Copenhagen than just the inner-City. Visitors with this type of behaviour will, in the following, be referred to as **mindful visitors**.

It is important to emphasize that all visitors, regardless of whether they are classified as mindful or not, should be welcomed in Copenhagen. However, there is a potential for making an extra effort in targeting visitors with a mindful behaviour and to influence more visitors to act mindfully.

The first step of this journey is to identify the interests and characteristics of these mindful visitors.

As an extension of the other findings in 10X Copenhagen, an experiment was designed to try a new way of segmenting visitors. While many previous analyses have tried to create segments amongst visitors, based on metrics such as nationality, age and interests (shopping, nature etc.), this experiment aims at identifying a segment of mindful visitors based on behavioural data.

This experiment tries to identify these mindful visitors using measures of self-perceived social, economic and environmental sustainability, combined with a measure of the match between the locals' and visitors' interpretation of Copenhagen's DNA. That is, their view on what the most characteristic aspects of Copenhagen are. The mindful visitors in this report are the ones who scored the highest on these parameters.

This resulted in a segmentation, creating a group of mindful visitors consisting of about 13% of the respondents in the survey, who will be described in detail throughout this report. It is the first behavioural segmentation method of its kind done by Wonderful Copenhagen. As such, there are areas of the analysis, especially in terms of the visitors' behaviour, that could, and should, be expanded in future studies to further increase the understanding of the behaviour of visitors.

This experiment was completed using a dataset from another analysis, that was not specifically designed for behavioural segmentation and, as such, the results are more explorative/indicative than conclusive. For a more detailed discussion of future analysis requirements, please see the section on page 29.

Therefore, the report finally discusses the impact of this experiment on future segmentation studies within tourism, both in terms of which aspects of the analysis worked well (and less well) and discusses how this methodology can be expanded and adapted in future studies, to gain even more insight into the minds of visitors.



## METHODOLOGY

This experiment builds on the analytical report titled “Københavns DNA og fremtidige potentialer” (Copenhagen’s DNA and future potential) and uses the same dataset. The report “Københavns DNA og fremtidige potentialer” is conducted by the consultancy company Epinion on behalf of Wonderful Copenhagen<sup>1</sup>.

The dataset used for the segmentation had a total of 4,545 respondents, of which 1,721 were ‘previous visitors’ in Copenhagen and 2,824 were ‘potential visitors’ to Copenhagen.

The previous visitors consist of visitors who have been to Copenhagen within the last year, while the group of ‘potential visitors’ consists of visitors who have not been to Copenhagen within the last 3 years, but who have been on a city break within the last 3 years and, as such, have a potential to visit Copenhagen in the future.

To create the segment of mindful visitors, a set of selection criteria was chosen focusing on mindful sustainable behaviour.

In this report, sustainable behaviour is divided into three separate parts. That is, environmental, economic and social sustainable behaviour. Each of these three types of behaviours were measured using a set of statements that required respondents to define their own self-perceived level of sustainable behaviour by choosing to what extent they agreed or disagreed with a set of statements<sup>2</sup>.

The three types of sustainable behaviour were, given the limitations of the dataset, defined as follows<sup>3</sup>:

- Environmentally sustainable behaviour is, in this analysis, defined as visitors feeling a sense of responsibility for protecting the environment during their stay in Copenhagen, as well as having a preference for organic food and putting emphasis on the importance of Copenhagen, as a city, taking responsibility for protecting the environment.
- Economically sustainable behaviour is, in this analysis, defined as visitors having a focus on spending money in a way that benefits the local community rather than international companies, for instance, by preferring to buy products from smaller, locally owned shops (when possible).
- Socially sustainable behaviour is, in this analysis, defined as visitors trying to understand and adhere to the local norms, moving beyond the beaten track to explore the areas of the city that the locals use and having a desire to meet the locals of the city.

---

<sup>1</sup> <http://10xcopenhagen.com/wp-content/uploads/2019/01/K%C3%B8benhavns-DNA-og-Fremtidige-Potentialer-1.pdf>.

<sup>2</sup> See appendix on page 31 for further information about the defining statements.

<sup>3</sup> For a more in-depth discussion of the dataset’s limitations, and possible expansion in future analyses, please see page 29.

To explore the match between locals' and visitors' view on Copenhagen's characteristics, the locals were asked what they perceived as the 5 most characteristic aspects of Copenhagen. Previous visitors were then scored on how many of these same characteristics they thought were the most characteristic for Copenhagen, while potential visitors were scored on which of these same characteristics they found to be most appealing.

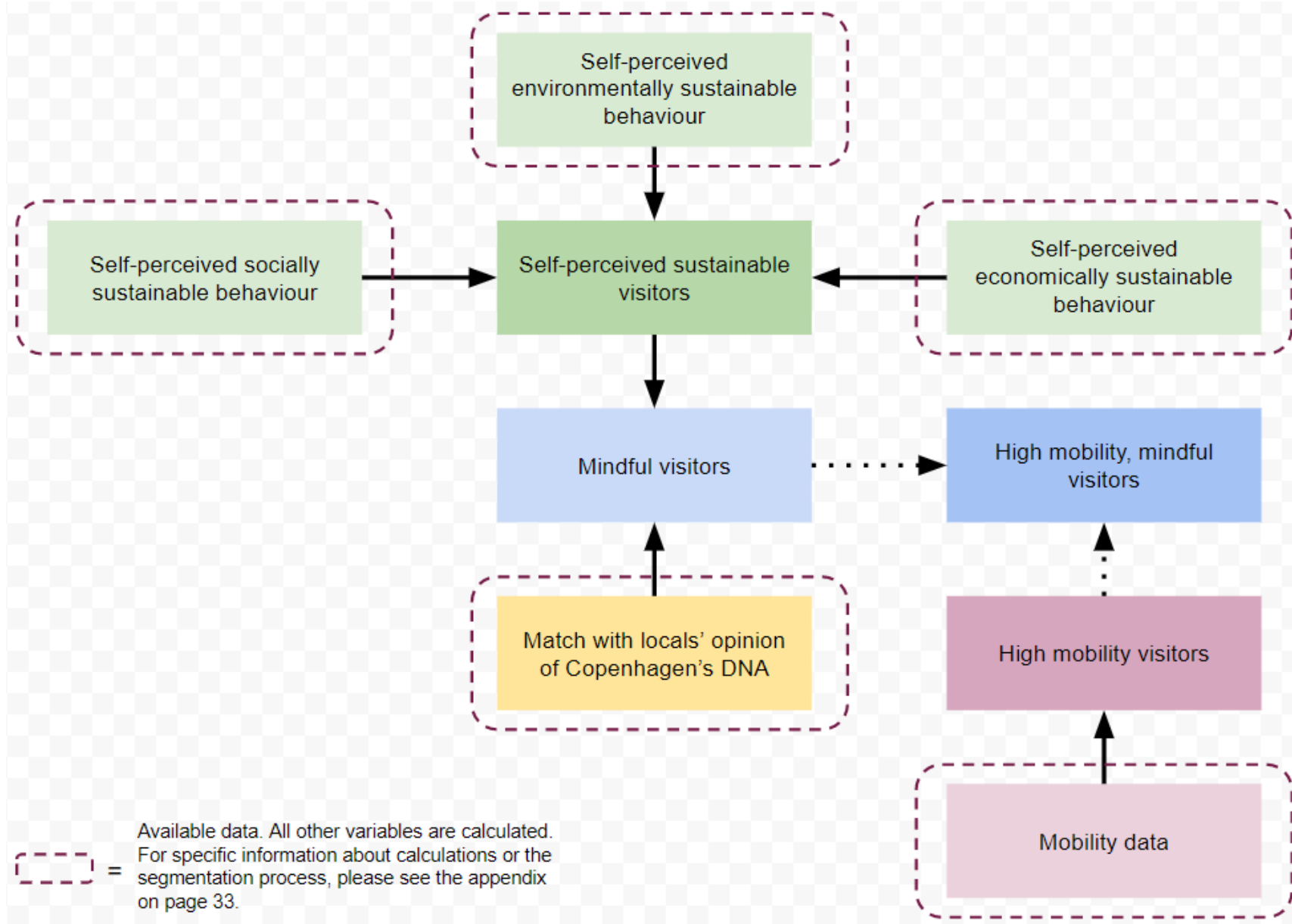
The mindful visitors in this report are the visitors who scored the highest on the parameters explained above, which resulted in a segment consisting of 13% of the 4,545 respondents.

Lastly, the dataset contained mobility data for the visitors who had been to Copenhagen previously. Visitors had reported which neighbourhoods they had visited during their stay as well as the location of their primary accommodation, which allowed for the creation of a mobility measure, based on the number of city neighbourhoods that each visitor had visited. This data was used to identify the characteristics of visitors who had moved beyond the beaten track and visited more than Copenhagen's city centre, which, in this analysis, was perceived as a crucial part of having a socially sustainable behaviour. The mobility measure is included since previous results from 10X Copenhagen show the need to limit the pressure of tourism in the inner city (Indre by) and invite visitors to explore other neighbourhoods, which furthermore increases visitors' overall satisfaction with their stay.

As explained, the segment of mindful visitors consists of both previous and potential visitors. However, mobility data was, of course, only available for previous visitors who had been to Copenhagen. Therefore, the mobility measure was analysed separately, and added as an additional layer, to give an indication of which of these mindful visitors had the highest mobility during their stay in Copenhagen.

The model on the next page is a visual illustration of the segmentation process, highlighting the intersection between the segmentation variables, which is what defines the segment of mindful visitors. The fact that they possess the best aspects of each of the segmentation variables, makes them the most likely visitors to show the type of behaviour that allows them to blend in, rather than the type of visitor who disrupts the daily lives of the locals.

For a detailed description of the segmentation variables, please see the appendix on page 31.





# KEY FINDINGS

**This section of the report summarizes the key findings of the segmentation experiment and analysis.**

### **ONE IN EIGHT RESPONDENTS CLASSIFIED AS MINDFUL VISITORS**

13% of the respondents were classified as mindful visitors with roughly the same percentage amongst both the previous visitors (14%) and the potential visitors (13%). In other words, 14% of the visitors currently in Copenhagen could very well be amongst this segment of mindful visitors, who perceive themselves as being both socially, environmentally and economically sustainable and who have a similar perspective on the DNA of Copenhagen as the locals.

The question is how the city of Copenhagen and locals can foster this behaviour among visitors and, in a long-term perspective, form a larger group of mindful visitors.

### **ONE TYPE OF SUSTAINABILITY RARELY STANDS ALONE**

When comparing groups of visitors who score highly on the measure of either self-perceived social, environmental or economic sustainability, these visitors also tend to score highly on the measures for the remaining two aspects of sustainability. For example, visitors who perceive themselves as being highly socially sustainable will often also perceive themselves as being highly environmentally and economically sustainable.

The result hence indicates that when telling the story of Copenhagen to international visitors, it could be beneficial to incorporate aspects of all three types of sustainability.

However, telling the right story is not the entire solution. Visitors need to have the opportunity to behave in a sustainable way. Without the right options and easily available information about them, visitors cannot be expected to behave in a sustainable manner, even if they want to, because the necessary tools will not be available to them.

### **MINDFUL VISITORS VALUE THE LOCALHOOD EXPERIENCE**

The *local* atmosphere and the attitude of the *locals* were amongst the top 5 (out of 18) important aspects for the mindful visitors when going on a city break, with average scores for these two aspects being significantly higher amongst mindful visitors compared to the other visitors<sup>4</sup>.

In other words, these are some of the aspects of a city break that the mindful visitors put high emphasis on. Therefore, it is relevant to consider how we, as hosts, can better invite visitors to experience our local atmosphere and way of living, and how we can tell this story to potential visitors who have not experienced it yet. What does Copenhagen's atmosphere, and way of living, look, sound and smell like and what makes it unique, compared to other travel destinations?

Adding to this, high mobility visitors agreed, more so than low mobility visitors, that they always look for the local/hidden places in a city, where the locals hang out and that the local atmosphere is important to them during a city break.

---

<sup>4</sup> The term "other visitors" is used to refer to all respondents who were not classified as mindful visitors in the segmentation process.

## **COPENHAGEN IS CHARACTERIZED BY BICYCLES**

The most striking difference between mindful visitors' and other visitors' perception of Copenhagen's DNA, is the fact that 72% of the mindful visitors, who have previously been to Copenhagen, thought that the city's bicycles were the most characteristic aspect of the city, while this was the case for just 39% of the other visitors.

Similarly, 28% of the potential mindful visitors said that the city's many bicycles were one of the top 5 most appealing characteristics of the city, compared to just 9% of the average potential visitors.

This aspect also came to light when comparing high mobility<sup>5</sup> visitors to low mobility visitors, where 50% of the high mobility visitors thought that the city's many bicycles was one of the most characteristic aspects of Copenhagen, compared to 38% amongst the low mobility visitors.

In other words, the fact that bicycles are such a popular means of transportation in Copenhagen, is something that can potentially be used to differentiate the city from competing travel destinations and be emphasized in the story telling of Copenhagen to appeal to the mindful visitors.

## **MINDFUL VISITORS ARE HUNGRY FOR LOCAL FOOD**

The *local* cuisine was another important aspect amongst the mindful visitors, being rated as the 3<sup>rd</sup> most important city break aspect (out of 18).

Given the mindful visitors inclination to want to experience the local atmosphere, they are likely interested in what type of food experiences that locals opt for. This seems particularly potent, given that the city's variety of restaurants, cafes and food markets was ranked as the 7<sup>th</sup> most important aspect (out of 18) of a city break, for the mindful visitors.

Furthermore, results have shown a correlation between high mobility visitors and visitors with an interest in food. This points to a potential of promoting local food experiences in Copenhagen's neighbourhoods and letting this be an invitation for visitors to explore more of Copenhagen than just the inner-city.

---

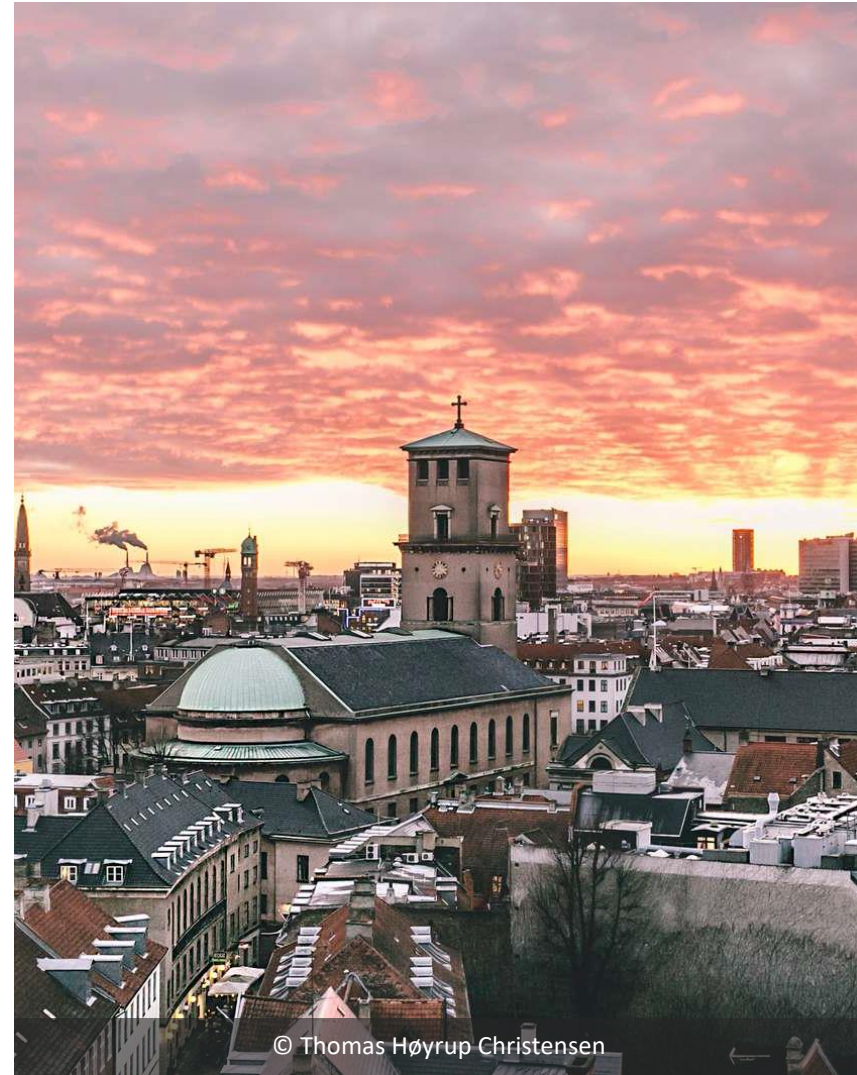
<sup>5</sup> High mobility visitors were defined as previous visitors who visited more of the city's neighbourhoods (>2) than the other visitor. Low mobility visitors were defined as the ones who did not meet this requirement.

**COPENHAGEN'S MOST CHARACTERISTIC ASPECTS, IN THE EYES OF PREVIOUS VISITORS, ARE NOT THE SAME AS THE MOST APPEALING CHARACTERISTICS, IN THE EYES OF POTENTIAL VISITORS**

There was quite a stark difference between the characteristics that potential mindful visitors said appealed to them the most about Copenhagen and the aspects of the city that previous mindful visitors said were the most characteristic.

For potential mindful visitors, who had not been to Copenhagen in the last three years, the most appealing characteristics of the city were the famous attractions (48%), the historic buildings (39%) and the churches, towers and castles (35%). For the mindful visitors whose last city break was in Copenhagen, however, the most characteristic aspects of the city were its many bicycles (72%), the small size of the city (32%) and the city's canals (28%).

As such, what attracts visitors to the city, is not necessarily the aspects that are most characteristic for the city, but rather the aspects of the city that qualify as more traditional attractions, such as the historic buildings or castles. However, it is clear that other aspects of the city make a strong impression on the visitors during their stay, especially the city's many bicycles, which scored 40 percentage points higher than the second most characteristic aspect of the city, in the eyes of previous visitors.



© Thomas Høytrup Christensen



### **EASY COMMUTING IS AN IMPORTANT ASPECT OF A CITY BREAK**

It was very important to both mindful and other visitors to be able to quickly and efficiently get around the city using public transportation, but this was even more so the case for the mindful visitors. This highlights the importance of an effective and easy to understand public transportation system also for international visitors. Furthermore, research from 10X Copenhagen shows that information about, and accessibility to, the public transportation system can be improved in the eyes of visitors.

### **TOURIST ATTRACTIONS ALSO ATTRACT THE MINDFUL VISITORS**

While mindful visitors have the largest focus on the local aspects of the city, results show that they also want to experience the city's famous attractions, just like the other visitors.

This means that experiencing the local aspects of the city and experiencing the famous attractions are not necessarily mutually exclusive goals for the visitors. It could also indicate that the visitors consider the city's attractions to be part of the city's atmosphere and, as such, part of what they would like to experience while in the city.

### **INTEREST IN COMBINING URBAN- AND COUNTRYSIDE EXPERIENCES**

The city's parks and green areas was the 6<sup>th</sup> (out of 18) most important aspects to mindful visitors, with access to nature within a short distance of the city, following closely as the 9<sup>th</sup> most important aspect.

Furthermore, 90% of the mindful visitors said that they would like to combine their urban stay with a countryside experience. This could indicate a potential to promote more nature related experiences both within and outside the city, helping to lowering the pressure of tourism in the inner-city.

### **HIGH MOBILITY VISITORS OFTEN STAY OUTSIDE THE CITY CENTRE AND IN AIRBNB RENTALS**

63% of the high mobility visitors chose accommodation located outside of the neighbourhood of the inner-city (Indre by), while this was the case for just 42% of the low mobility visitors.

At the same time hotel accommodation was the most popular choice for both high (43%) and low mobility (64%) visitors. However, significantly more high mobility visitors opted to stay in Airbnb rentals (20% vs. 10%) and in hostels (10% vs. 5%).

# **DEMOGRAPHICS, TRAVEL MOTIVATION AND INFORMATION SOURCES**

## DOES NATIONALITY EVEN MATTER?

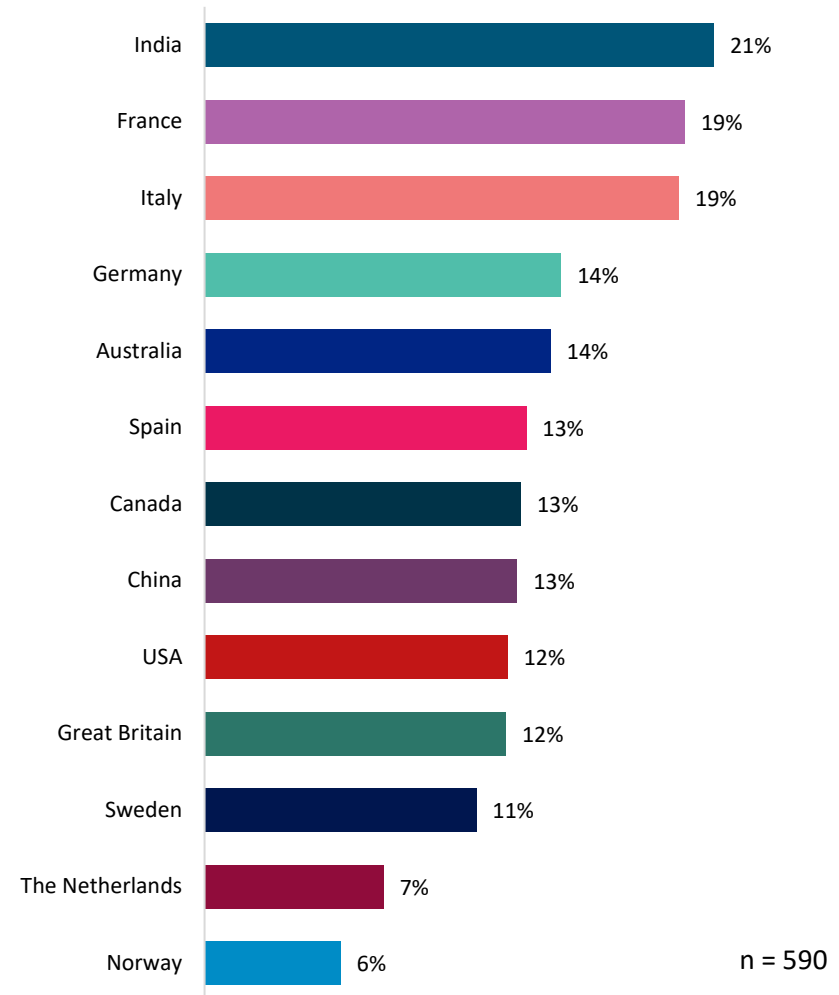
Overall, nationality does not make a significant difference when comparing the mindful visitors with the other visitors. However, some markets show a larger inclination to be mindful visitors than others.

The Indian, French and Italian markets had a significantly higher occurrence of mindful visitors, while the Dutch and Norwegian markets had a significantly lower occurrence of mindful visitors.

In other words, visitors from certain markets might be more likely to be mindful visitors, but all markets had a percentage of visitors who were classified as mindful visitors.

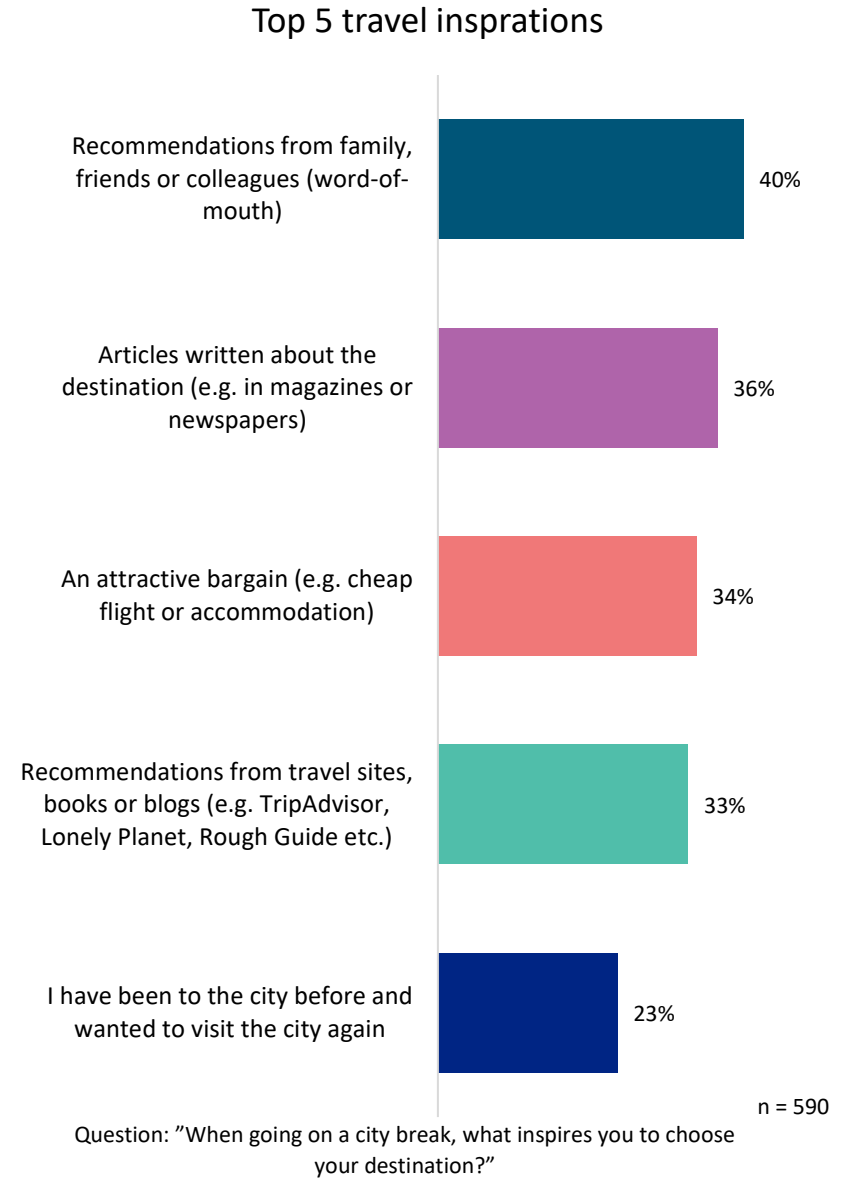
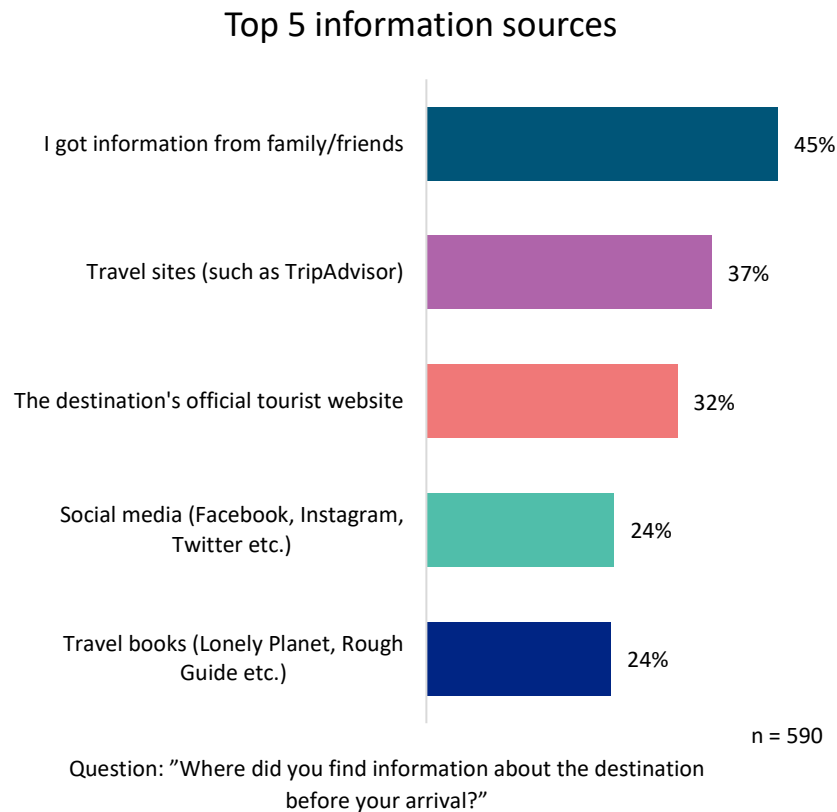
When comparing nationality in this way, it is important to understand that there are cultural differences between countries and that the segmentation of mindful visitors was primarily based on self-perceived behaviour. There are, for instance, likely differences between how sustainable behaviour is perceived in Denmark and how it is perceived in each of the countries listed in the graph on the right. This means that while some of these mindful visitors might be considered sustainable in their home country, they might not be considered sustainable in Denmark and vice versa. Therefore, it is not necessarily possible to draw any conclusions from the differences between the markets, but it is worth noting that there was a difference between them.

Percentage of respondents in each market classified as mindful visitors



# INSPIRATION AND INFORMATION

The graph on the right shows what motivated the mindful visitors to choose a city break destination, while the graph below shows how they usually find information about that destination. There were not any significant differences between mindful and other visitors for these two variables. Hence, same sources of information channels can be used to reach the mindful visitors as other visitors.





# **SELF-PERCEIVED SUSTAINABILITY**

## SELF-PERCEIVED SOCIAL SUSTAINABILITY

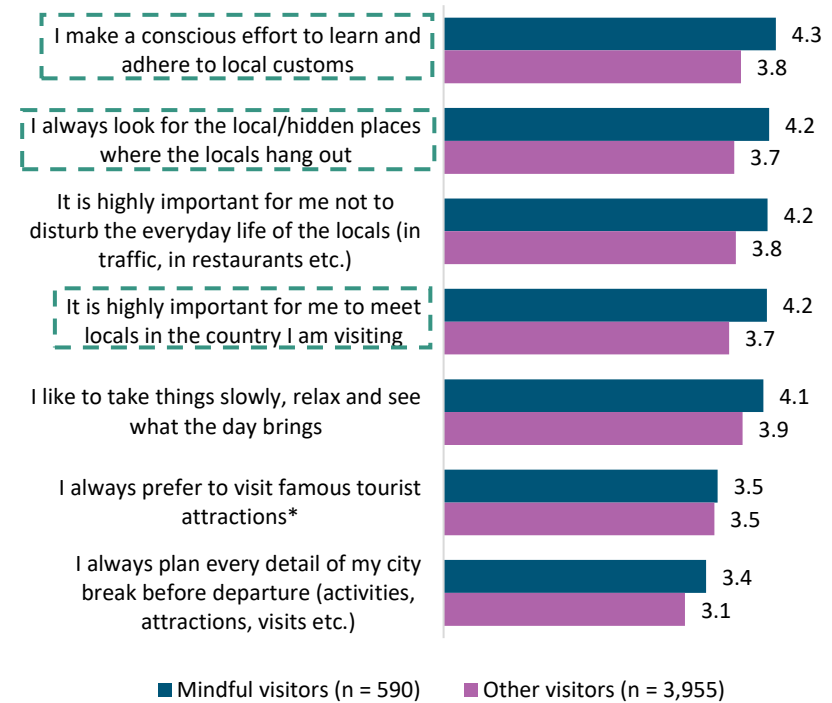
The mindful visitors' self-perceived social sustainability is one of the aspects where they stand out from the other visitors.

As might be expected, the mindful visitors score higher on each of the statements, except for one, which stands out from the rest. The answer from mindful visitors and other visitors is identical for the statement "I always prefer to visit famous tourist attractions". This suggests that famous tourist attractions might also be seen as a part of the city's local atmosphere and, as such, visiting famous attractions and having an understanding of being socially sustainable does not necessarily constitute two mutually exclusive behaviours.


It might seem counter-intuitive that scores for both the statement "I like to take things slowly, relax ..." as well as "I always plan every detail ..." are both above 3, but the two variables were not significantly correlated, suggesting that while visitors in both groups enjoy taking things slow and seeing what the day brings, they also have certain aspects of the city break planned.

Overall, the results indicate a significant willingness amongst the mindful visitors to behave in a socially sustainable way, which needs to be fostered by the city of Copenhagen and the locals. Visitors need to be given the information they need to be able to find and explore the areas of the city that the locals use and to find local experiences.

### "As a traveler on a city break..."



\*Difference not statistically significant

 = The statements marked in green were used specifically to create the measure for self-perceived social sustainability. This also applies for the two following graphs.<sup>6</sup>

<sup>6</sup> The other statements in the graph were also related to this topic, but the correlation between them was not high enough to justify using them in the segmentation process, based on a factor analysis.

## SELF-PERCEIVED ENVIRONMENTAL SUSTAINABILITY

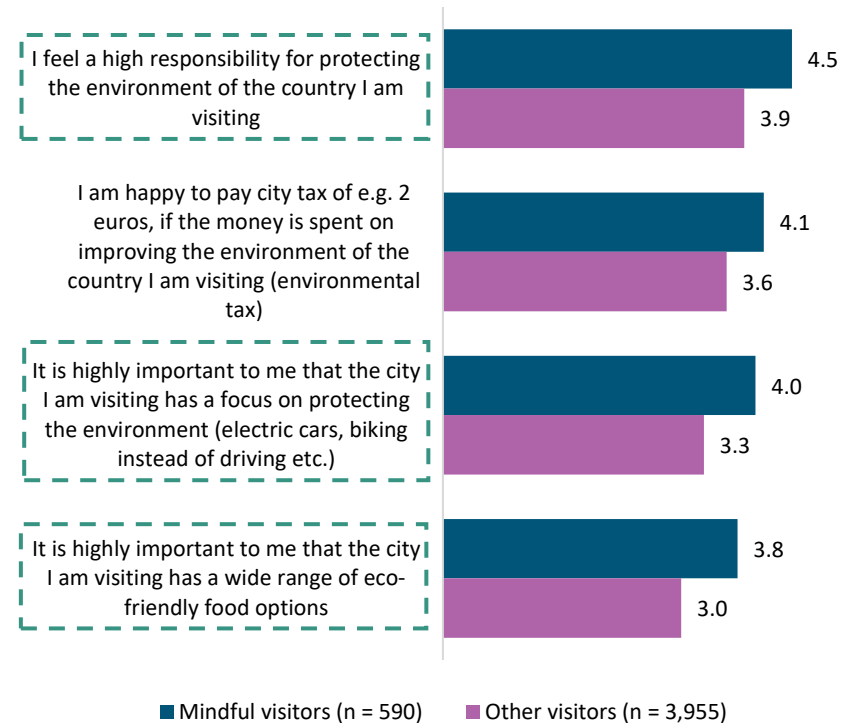
The mindful visitors' self-perceived environmental sustainability is another aspect where they stand out from the other visitors.

The measure for self-perceived environmental sustainability incorporates both the respondents' own sense of responsibility for protecting the environment, their focus on eating organic food, which has a lower impact on the environment during production, as well as the respondents' emphasis on the destination having its own focus on protecting the environment.

As can be seen in the graph on the right, the mindful visitors score highly across all the statements related to self-perceived environmental sustainability but creating environmentally sustainable tourism is a two-way process. Both the visitors and the city of Copenhagen itself needs to have a focus on environmental sustainability to truly foster this type of behaviour. The mindful visitors show a willingness to be environmentally sustainable, but they cannot be expected to do it on their own, without support from the stakeholders in the city.

Interestingly, the visitors also show a high propensity for being willing to pay a city tax of e.g. 2 euros, if the money is spent on improving the environment of the country they are visiting.

"As a traveler on a city break..."



## SELF-PERCEIVED ECONOMIC SUSTAINABILITY

The last aspect of sustainability analysed in this study was the respondents self-perceived economic sustainability. In other words, to what extent the respondents are conscious about spending money in a way that benefits the local community of the city that they are visiting.

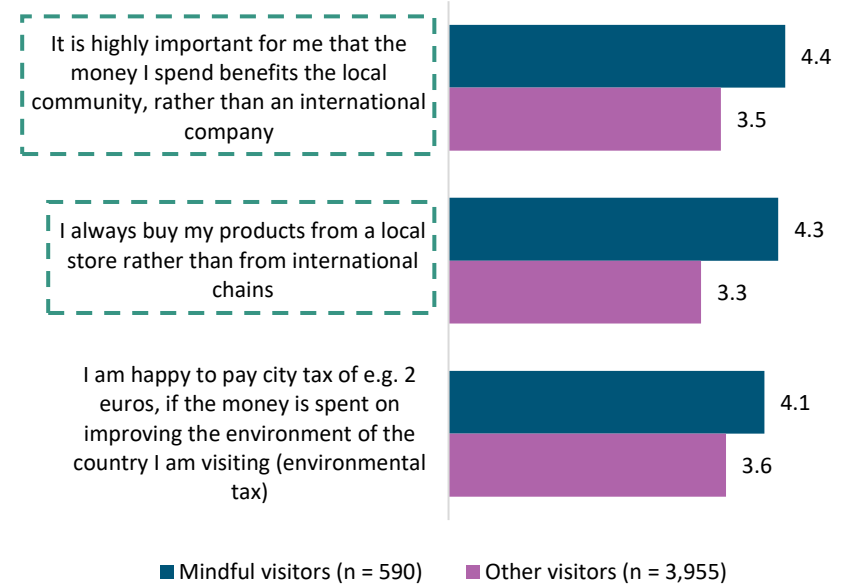
The significant gaps between the mindful and other visitors suggest that mindful visitors put much emphasis on spending their money in a sustainable manner while on a city break.

For this to be possible, however, it is important that Copenhagen leads visitors to the local shops and activities that benefit the city. In other words, visitors cannot be expected to know how to spend their money in a way that benefits the local community without being given the necessary information to support this behaviour.

This could perhaps also be used as a means of moving visitors around the city, by showing them the various local shops, restaurants and activities that are available in the different city neighbourhoods, thus giving them another reason to go explore more of the city.

Adding to this, moving around the city more is likely to give visitors a more in-depth experience of the city's atmosphere, local food and local culture, which this analysis demonstrates is something that mindful visitors, in particular, have shown an interest in.

### "As a traveler on a city break..."





## ONE TYPE OF SUSTAINABILITY RARELY STANDS ALONE

An interesting trend amongst the respondents is that respondents who perceive themselves to be sustainable either socially, environmentally or economically, rarely only perceive themselves to be one kind of sustainable.

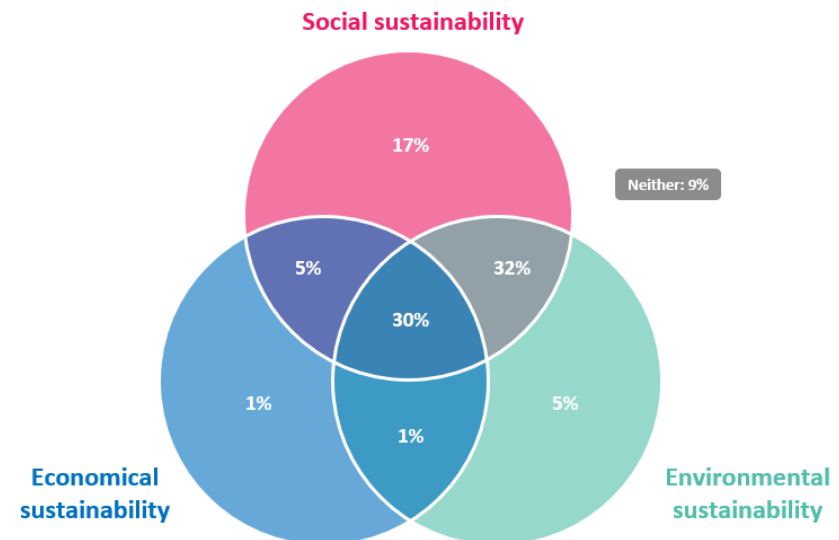
The Venn diagram on the right shows the percentage of all respondents (mindful and other) who perceive themselves to show any given combination of sustainable behaviour. For example, 17% of respondents perceived themselves to be socially sustainable, but not environmentally or economically sustainable.

Summarizing the diagram shows that:

- 9% did not perceive themselves to be any kind of sustainable
- 23% perceived themselves to be only one kind of sustainable (either socially, environmentally or economically)
- 68% perceived themselves to be two or more kinds of sustainable, of which:
  - 30% perceived themselves to be sustainable both socially, economically and environmentally<sup>7</sup>

In other words, the majority of respondents who perceived themselves to be sustainable, perceived themselves to be sustainable in at least two of the categories. Self-perceived economic sustainability seems to be the aspect that lacks behind, in terms of the percentage of respondents who feel that they score highly on this behaviour.

Given the fact that most respondents deem themselves to be sustainable in more than one way, it might be possible to encourage some of the respondents, who already see themselves as being socially and environmentally sustainable, to be economically sustainable as well, thus increasing the percentage of respondents who might be classified as mindful visitors.



<sup>7</sup> The variable used to measure the match between locals' and visitors' opinion of Copenhagen's DNA was not included in the Venn diagram, which is why 30% of visitors were classified as both socially, environmentally and economically sustainable, but only 13% of visitors were classified as mindful visitors.

# **MATCH OF INTERESTS AND PERCEPTIONS OF COPENHAGEN'S DNA**

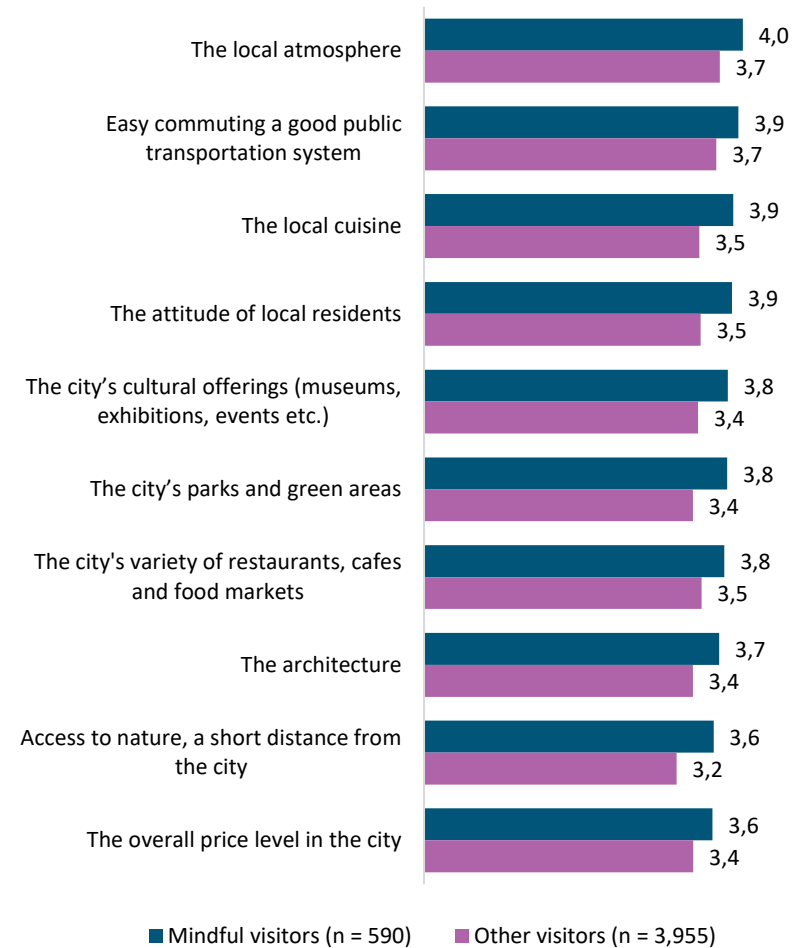
## WEIGHING THE IMPORTANCE OF CITY BREAK ASPECTS

The graph to the right highlights the top 10 aspects (out of 18) of a city break that visitors (mindful or other) deem to be the most important.

Several of these aspects are also closely related to the three areas of self-perceived sustainability, such as the aspects of local atmosphere and the attitude of the locals, which are closely related to social sustainability.

However, the mindful visitors also emphasize a higher importance of aspect not necessarily closely related to sustainability, such as the importance of a good public transportation system, and the city's cultural offerings.

Top 10 important aspects of a city break



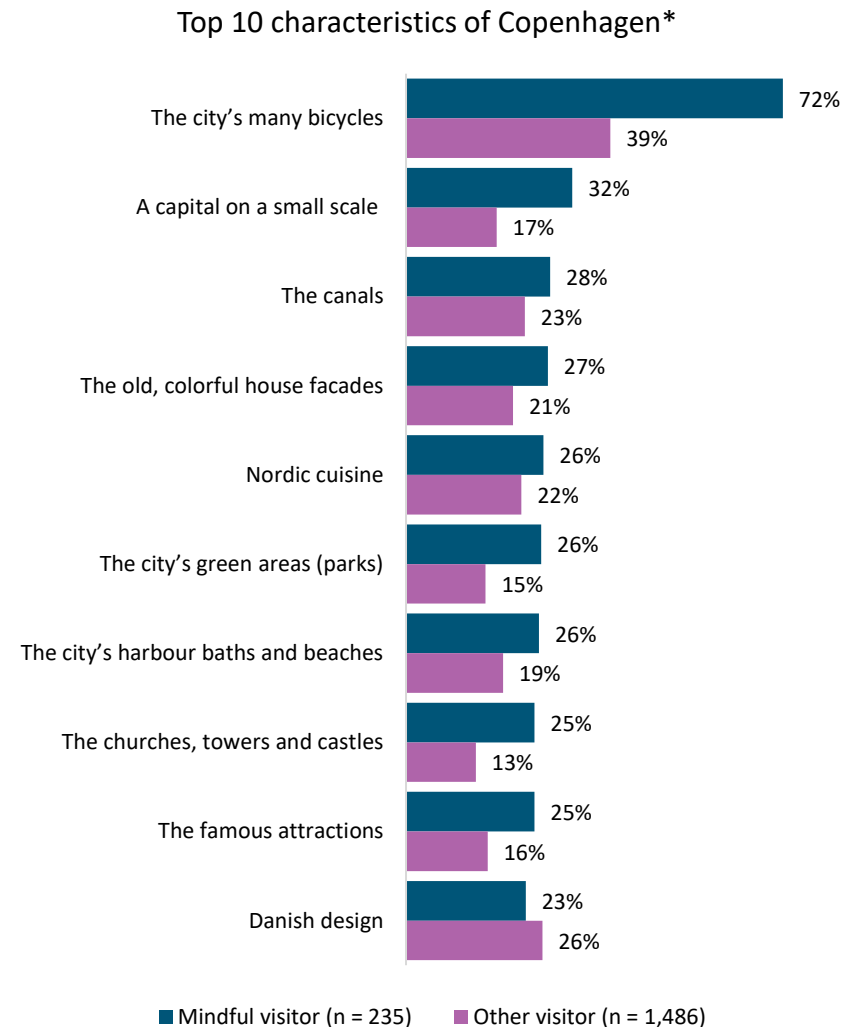
\*Question: "Thinking back on your recent [city break/visit to Copenhagen], which of the following aspects were important for you when visiting [the city]?"

## COPENHAGEN'S DNA IN THE EYES OF VISITORS

Overall, the mindful visitors and the other visitors, who have visited Copenhagen previously, agree on the characteristics of Copenhagen. However, the mindful visitors to a larger extent than the other visitor, especially when it comes to:

- The city's many bicycles.
- A capital on a small scale (many experiences and different neighbourhoods within a short distance of each other).
- The city's churches, towers and castles.

While the city's many bicycles were the most chosen characteristic amongst both the mindful and other visitors, a significantly higher percentage of mindful visitors chose this characteristic to describe Copenhagen. No less than 72% of the mindful visitors chose the city's many bicycles to be one of the most characteristic aspects of Copenhagen.



\*Question: "In your opinion, what are the most characteristic aspects of Copenhagen? (Please select a maximum of 5)"

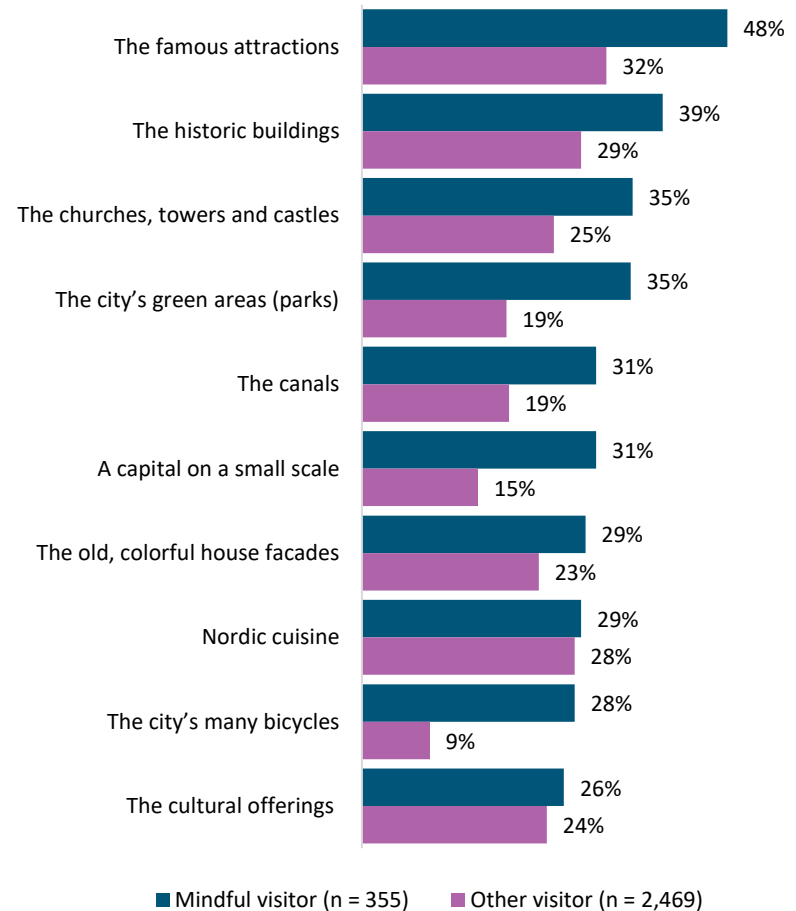
## THE APPEAL OF COPENHAGEN’S CHARACTERISTICS TO POTENTIAL VISITORS

Similarly, to the previous visitors, the potential mindful visitors and the potential other visitors agreed on the appeal of most of Copenhagen’s characteristics. However, four characteristics were particularly more appealing to the potential mindful visitors compared to the other visitors. These were as followed:

- The famous attractions
- The city’s green areas (parks)
- A capital on a small scale (many experiences and different neighbourhoods within a short distance of each other)
- The city’s many bicycles

While both groups agreed that the famous attractions were the most appealing characteristics of Copenhagen, the other three aspects were further down the list. This means, that if the objective is to specifically attract the mindful visitors, rather than attracting all kind of visitors, it would make sense to emphasize the story of Copenhagen as a capital on a small scale, full of green areas and with a unique bicycle culture.

Top 10 appealing characteristics of Copenhagen\*



\*Question: "Which of the following Copenhagen characteristics most appeal to you? (Please select a maximum of 5)"

# HIGH MOBILITY VISITORS

## CLASSIFYING HIGH MOBILITY VISITORS

This section of the report presents the findings specific to the respondents who had a high mobility during their stay in Copenhagen. As discussed previously, this is a parameter that was analysed separately because the group of mindful visitors was meant to encompass both visitors who have already been to the city as well as potential visitors who have not yet been to Copenhagen. Therefore, the mobility measure was analysed separately, and added as an additional layer, to give an indication of which of these mindful visitors might have the highest mobility during a stay in Copenhagen.

In total, 1,721 previous respondents were interviewed and 819 (48%) of these were classified as high mobility visitors.

Comparing mobility amongst mindful visitors with the mobility of other visitors shows no significant difference. That is, mindful visitors do not necessarily move around the city more than other visitors.

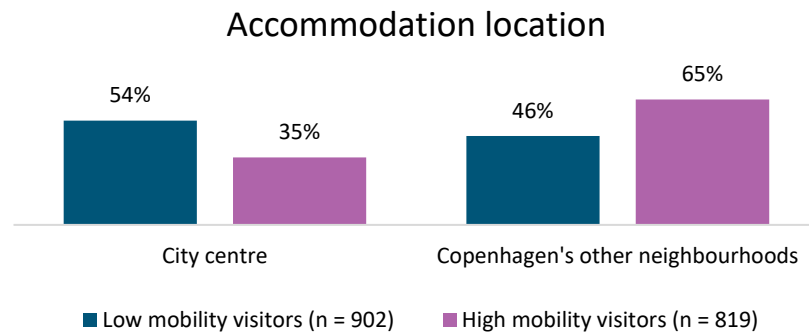
Mobility in this analysis is measured by the number of city neighbourhoods that the respondents visited during their stay in Copenhagen. The average visitor visited 2.7 different city neighbourhoods during their stay, including the one where their accommodation was located. As such, visitors who visited more than 2 city neighbourhoods during their stay in Copenhagen were classified as high mobility visitors, while visitors who visited 2 or fewer city neighbourhoods during their stay were classified as low mobility visitors.



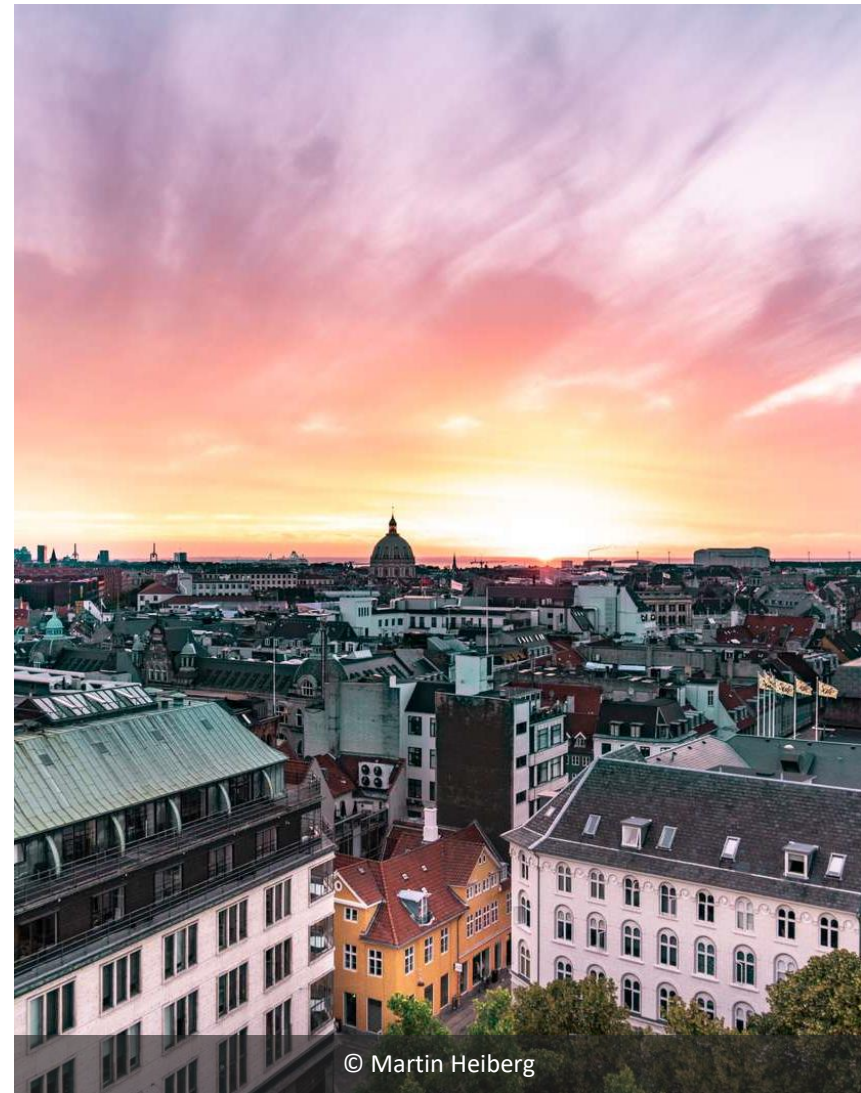


## CHOICE OF ACCOMMODATION

While 33% of high mobility visitors did choose accommodation located within the City Centre, the remaining 67% chose to live in other neighbourhoods of Copenhagen. Especially Vesterbro (18%), Nørrebro (11%), Frederiksberg (9%) and Amager (7%) were popular choices for accommodation amongst the high mobility visitors.



This difference in choice of location for the accommodation was likely caused by their different preferences for accommodation. While hotel was still the most popular choice of accommodation amongst high mobility visitors, only 46% chose to stay in a hotel, compared to 63% of the low mobility visitors. Instead, more of the high mobility visitors opted to stay in Airbnb rentals (20%) and hostels (10%), compared to the low mobility visitors.



## OTHER CHARACTERISTICS OF HIGH MOBILITY VISITORS

For the most part, high and low mobility visitors had the same preferences when it comes to which aspects of a city that they deemed to be most important while on a city break, as well as their perceived social, economic and environmental sustainability. There were, however, a few differences between the group of high and low mobility visitors.

- 79% of high mobility visitors agreed that they always look for the local/hidden places in a city where the locals hang out. For the low mobility visitors, 68% agreed, which is still a majority, albeit significantly lower than the 79% amongst high mobility visitors.
- When it came to which aspects of a city that was important to the high mobility visitors during their stay in Copenhagen, only one aspect stood out, compared to the low mobility visitors, in terms of significant differences between the two groups: The local atmosphere, which was given an average importance of 3.9 amongst high mobility visitors, compared to an average importance of 3.7 amongst low mobility visitors.
- 73% of the high mobility visitors said that they were interested in local food, which was the case for 61% of the low mobility visitors. The local food experiences could be an ideal reason to explore more than just the city centre.
- More of the high mobility visitors (50%) thought that the city's many bicycles were one of the most characteristic aspects of Copenhagen, compared to the low mobility visitors (38%).
- More of the high mobility visitors felt that the locals were welcoming, compared to the low mobility visitors. In fact, 51% of high mobility visitors thought the locals were welcoming, while this was the case for just 41% of the low mobility visitors.

- 73% of high mobility visitors said that experiencing another country's culture was one of the three most important things when going on a city break, to which 63% of low mobility visitors agreed.



© Andrea Nuñez

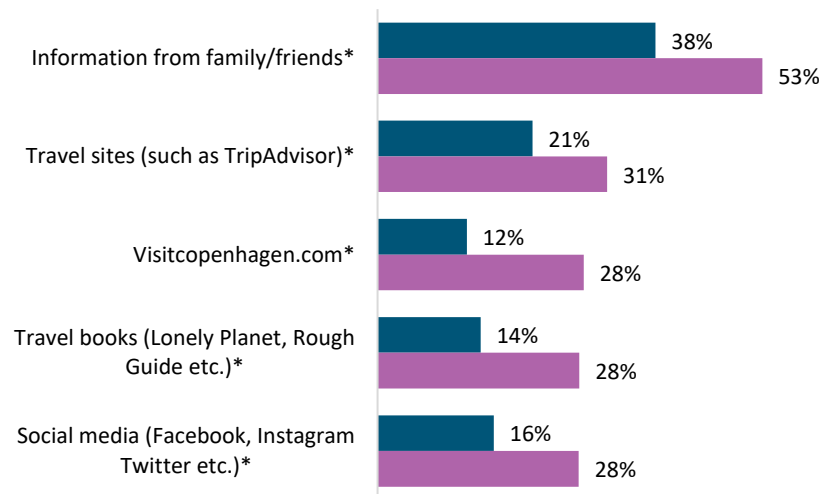
# TRAVEL MOTIVATION AND INFORMATION SOURCES

Unlike the case for mindful visitors vs. other visitors, there was a difference in travel motivation and information sources for high mobility visitors compared to low mobility visitors. The graphs below highlight the top 5 information sources and travel motivations for high mobility visitors and marks with a star the ones with a significant difference compared to the low mobility visitors.

The high mobility visitors, on average, used 2.5 different information sources, compared to 1.5 amongst the low mobility visitors, suggesting that the high mobility visitors might do more research before their departure or that they are more diligent in terms of cross-checking the information that they find from any given source.

Furthermore, the high mobility visitors, on average, choose 1.4 travel motivations compared to an average of 1 amongst the low mobility visitors. This finding supports the idea that the high mobility visitors might be more thorough in their research of any given travel destination, which could also be related to their mobility in cases where their research leads them to discover more interesting locations/activities on the destination.

Top 5 information sources

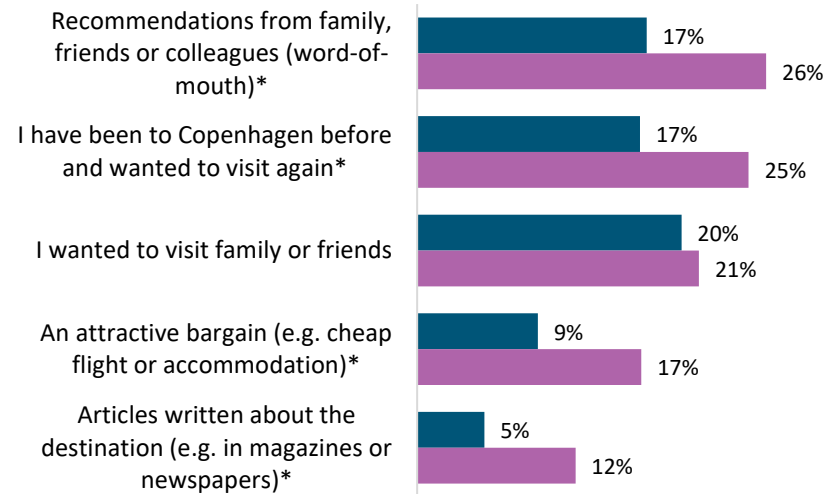


■ Low mobility visitors (n = 902)   ■ High mobility visitors (n = 819)

Question: "Where did you find information about the destination before your arrival?"

\*Significant difference

Top 5 travel motivations



■ Low mobility visitors (n = 902)   ■ High mobility visitors (n = 819)

Question: "When going on a city break, what inspires you to choose your destination?"

\*Significant difference

# **SUMMARY AND REFLECTION**



## FUTURE WORK WITH BEHAVIOURAL SEGMENTATION

This report presents the first steps towards working with behavioural segmentation, based purely on opinions and behaviour of the respondents, as opposed to traditional segmentation variables such as demographics and expenditure. While the results in this report are very interesting and suggests that it is possible to segment visitors using data on perceived behaviour, there are also areas of this analysis that could be improved with further data and analysis.

First and foremost, the survey and data collection were not designed to be used for behavioural segmentation and, as such, the questions were not optimized for this type of analysis. The segmentation process was limited to a set of two batteries of questions containing a total of 13 statements, to measure the respondents own perceived sustainable behaviour, split into the categories of social, environmental and economical sustainability. Future studies with the purpose of creating behaviour-based segments amongst visitors should be entirely designed for this process and, as such, could contain more questions focusing on different behavioural aspects in addition to self-perceived sustainable behaviour.

Furthermore, future analyses of behavioural segments within tourism would benefit from a combination of data about both self-perceived behaviour and actual behaviour including mobility data. Self-perceived behaviour can then be used as a measure of intended or perceived sustainability, while the data on actual behaviour allows for a comparison between intent/perception and real behaviour. This could then be further expanded to analyse the possible barriers towards sustainable behaviour, if the analysis showed a difference between intent/perception and actual behaviour, as well as the impact of different cultures on visitors' understanding of what it means to behave in a socially, economically and environmentally sustainable manner.



# APPENDIX

Value parameter	Description	Calculation	Selection criteria
Self-perceived socially sustainable behaviour	This parameter was used as a measure for the respondents' interest, and engagement, in learning about, and respecting, the local customs	<p>The parameter was calculated as an average of three individual 5-step Likert scale questions, with options ranging from "strongly disagree" to "strongly agree". These three questions were chosen by running a factor analysis on the dataset for this survey and finding the most correlated, thematically relevant variables to include in this measure. The following three questions were included in the final value parameter:</p> <ul style="list-style-type: none"> <li>✓ "I always look for the hidden/local places where the locals hang out."</li> <li>✓ "It is very important to me that I meet the locals of the country I am visiting."</li> <li>✓ "I make a conscious effort to learn and adhere to local customs."</li> </ul>	Respondents had to receive a score above 3.0 on the 5-step Likert scale.
Self-perceived environmentally sustainable behaviour	This parameter was used as a measure for the respondents' own perceived dedication to acting in an environmentally sustainable manner as well as caring about their travel destination's focus on environmental sustainability	<p>The parameter was calculated as an average of three individual 5-step Likert scale questions, with options ranging from "strongly disagree" to "strongly agree". These three questions were chosen by running a factor analysis on the dataset for this survey and finding the most correlated, thematically relevant variables to include in this measure. The following three questions were included in the final value parameter:</p> <ul style="list-style-type: none"> <li>✓ "I feel a high responsibility for protecting the environment of the country I am visiting."</li> <li>✓ "It is very important to me that the city I am visiting has a large selection of organic food options."</li> <li>✓ "It is very important to me that the city I am visiting has a focus on protecting the environment (e.g. electric cars, biking instead of driving etc.)"</li> </ul>	Respondents had to receive a score above 3.0 on the 5-step Likert scale.



Value parameter	Description	Calculation	Selection criteria
Self-perceived economically sustainable behaviour	This parameter was used as a measure of the respondents' focus on spending their money in a way that benefits the local community as opposed to simply benefitting international corporations	<p>This parameter was two-part, in the sense that two 5-step Likert scale questions with options ranging from "strongly disagree" to "strongly agree" was used to measure self-perceived economical sustainability. However, the two scales were included as separate criteria given slightly lower correlation than needed in order to justifiably combine them into a single scale.</p> <p>The following two statements were used for this measure:</p> <ul style="list-style-type: none"> <li>✓ "I always buy my products from a local store rather than from international chains."</li> <li>✓ "It is very important to me that the money I spend benefits the local community, rather than an international company."</li> </ul>	Respondents had to receive a score above 3.0 on each of the 5-step Likert scales.

Value parameter	Description	Calculation	Selection criteria
Similar opinion of Copenhagen's DNA as locals	This parameter was used as a measure of the extent to which previous visitors agreed with locals' perception of Copenhagen's DNA as well as the extent to which this perception of Copenhagen's DNA was appealing to potential visitors.	To calculate this measure, each of 20 characteristics of Copenhagen were given a score equal to the relative percentage of locals who had chosen the given aspect, when asked which 5 aspects were most characteristic for Copenhagen. This resulted in a set of scores for the 20 characteristics which totals a value of 1. In other words, if a respondent chose all 20 aspects as representative of Copenhagen, they would receive a score of 1 for this parameter, while they would receive a score of 0, if they chose none of the characteristics chosen by the locals. Previous visitors were, however, limited to choosing the 5 most <i>representative</i> characteristics for Copenhagen, while potential visitors were asked to choose the 5 most <i>appealing</i> characteristics of Copenhagen (from the same list of 20 characteristics), given their presumably limited knowledge of the city. Being limited to 5 choices, created a limit for this parameter, where visitors could get a maximum score of 0.54.	Respondents were required to receive a score of 0.25 or above.
High mobility during their stay in Copenhagen	This parameter was used as a measure of the extent to which previous visitors move around in the neighbourhoods of Copenhagen, during their stay in the city. That is, it measures the number of neighbourhoods that the respondents visited during their stay.	<p>This is simply the sum of neighbourhoods that each respondent visited during their last stay in Copenhagen. This parameter was only available for previous visitors and not for potential visitors. It was also not possible to create an estimate of mobility for potential visitors. Therefore, this value parameter was analysed separately in this analysis, because the group of mindful visitors aimed to include both previous and potential visitors.</p> <p>As such, the group of mindful visitors was created using the above five value parameters, while the characteristics of high mobility visitors was analysed as a separate layer that can be used to indicate which of the mindful visitors might have the highest mobility during a stay in Copenhagen.</p>	Respondents were required to have had above average mobility (>2 visited) neighbourhoods) during their stay in Copenhagen.



For inquiries about this report, please contact analyst Mike Wedel Hansen at [mha@woco.dk](mailto:mha@woco.dk)

WONDERFUL  
COPENHAGEN

