

Resident Sentiment Index

Are Copenhagen residents tourism-supportive?



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Introducing the Resident Sentiment Index



A Global Standard

For measuring residents' sentiment towards tourism

TOP Influencers of visitor experience



Because residents' attitude is the first driver of your visitor experience

Tourism growth only goes in hand with local population acceptance
We provide the data to monitor residents' sentiment
... before it becomes a problem!

Ensure your residents will play
for and not *against* your tourism planning



A global standard for all cities

For monitoring Residents' perceptions towards tourism



30+ Essential Indexes

Tourism positive and negative impact on resident mood



Customization

Because each city addresses specific tourism situations



Unique Benchmarking

Based on norms for cities having similar features



A flexible methodology

Full service or embedded in exiting resident surveys

How are Resident Sentiment Data collected?

A flexible screening process maximizing sample representativeness



Sample representativeness

- Quotas and data weighting schemes defined per district, gender and age using reference population statistics
- Inclusion of areas having all levels of tourism pressure on residents
- Controls on qualification criteria that can influence opinions: tourism-related occupation, visitor hosting activities...



Respondents recruitment

- From geo-localized access panels
- Ensures a good dispersion of respondents across districts



Standard online questionnaire + ad hoc questions

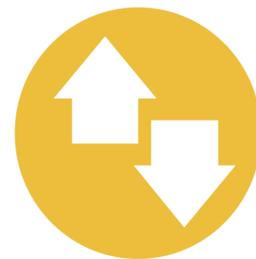
- Online self-completed responsive questionnaire (~ 6-8 minutes to complete)
- Includes sentiment rating and resident profiling for segmentation purposes
- Ensures consistency and data comparability across cities for benchmarking



Data have been weighted for reflecting city statistics for citizens' age and geographical location (districts).

Benchmarking that reveals *your* specific issues to address

- Comparison of key resident sentiment scores vs RSI Benchmarking norms
- RSI Benchmarking norms are calculated from 3000+ resident interviews across 15 cities in Europe: *Stockholm, Venice, Berlin, Brussels, Firenze, Lisbon, London, Lyon, Praha, Roma, Barcelona, Paris, Amsterdam, Marseille.*



Benchmarking metrics for mapping where you stand

- **Average** scores reflecting European resident opinion “norms”
- **Highest score** (Max value from the set)
- **Lowest score** (Min value from the set)

Note: individual scores of cities are not provided.

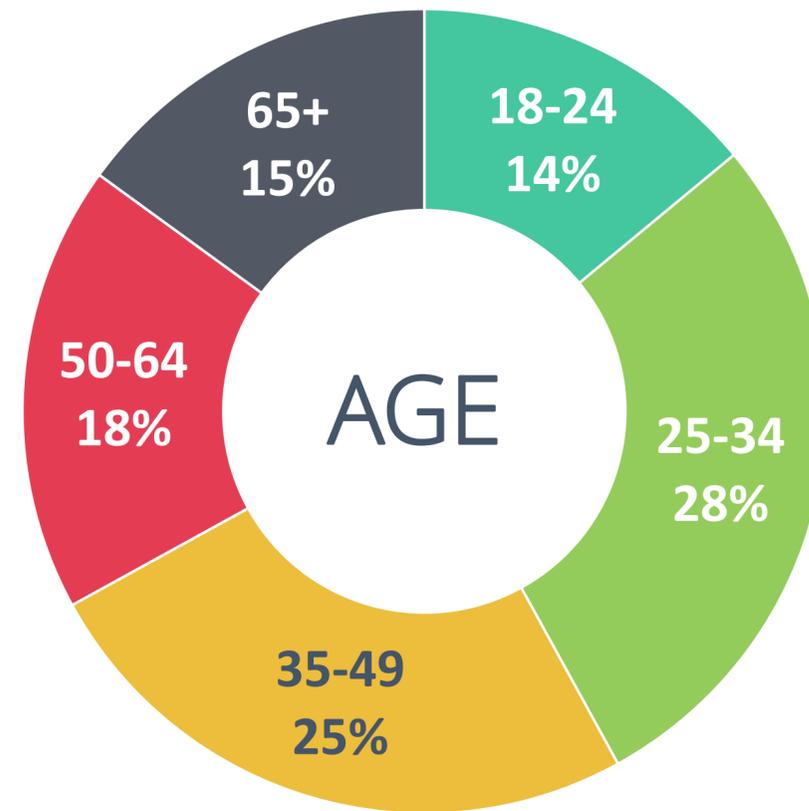
Sample specifications

Weighting plan applied on the sample of CPH residents

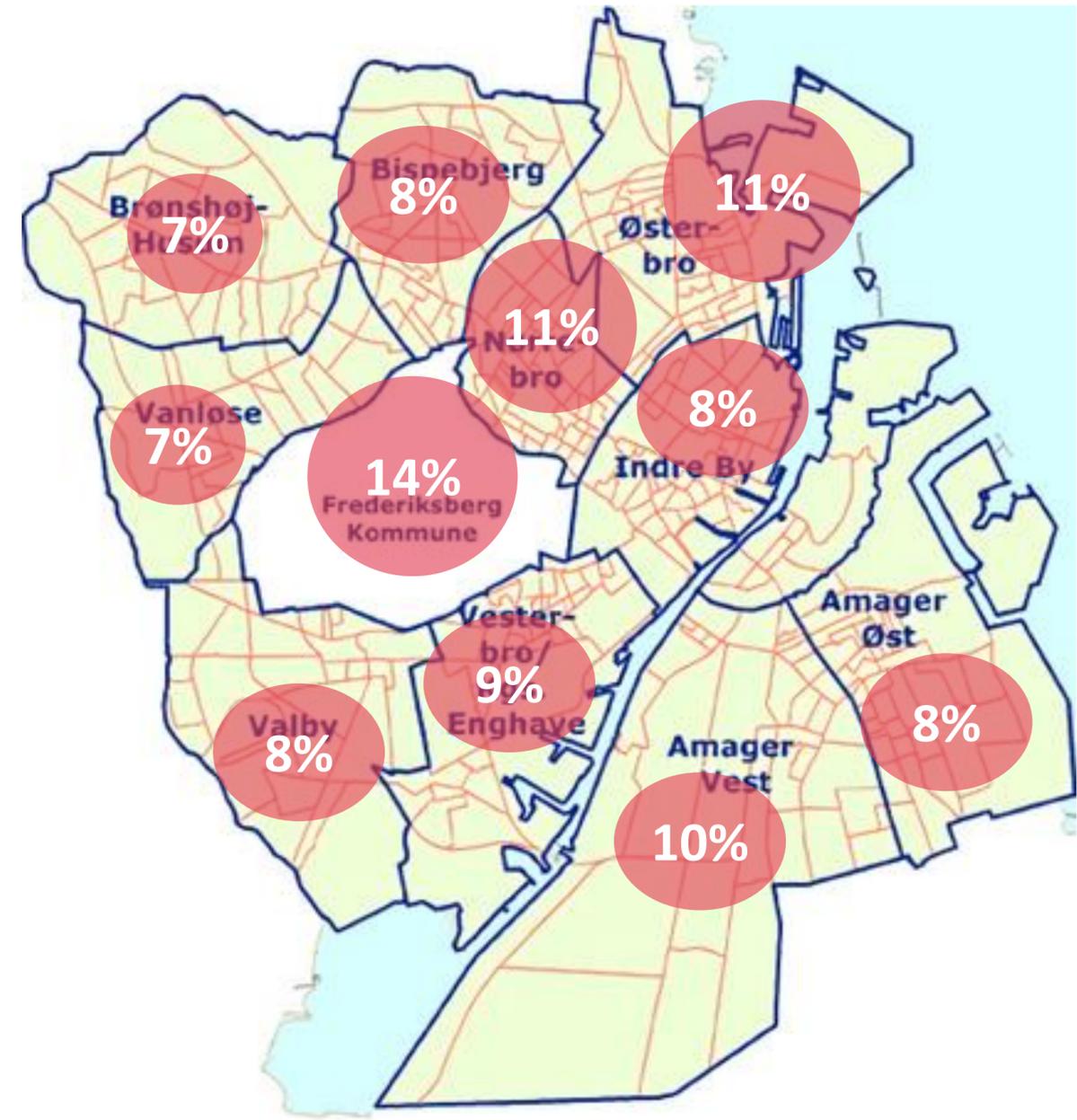


1.500 respondents

- Interviewed online
- Screened from Access Panel
- Data collection period : **From Feb 18th to March 7th, 2020**



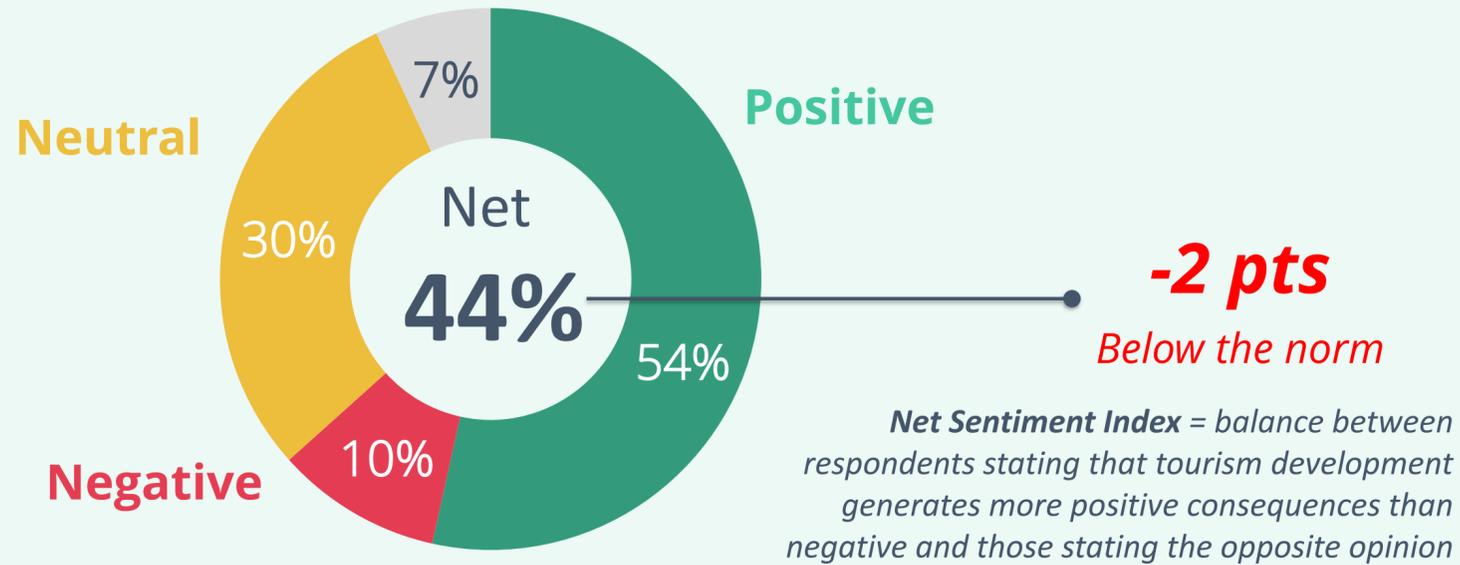
Districts dispersion



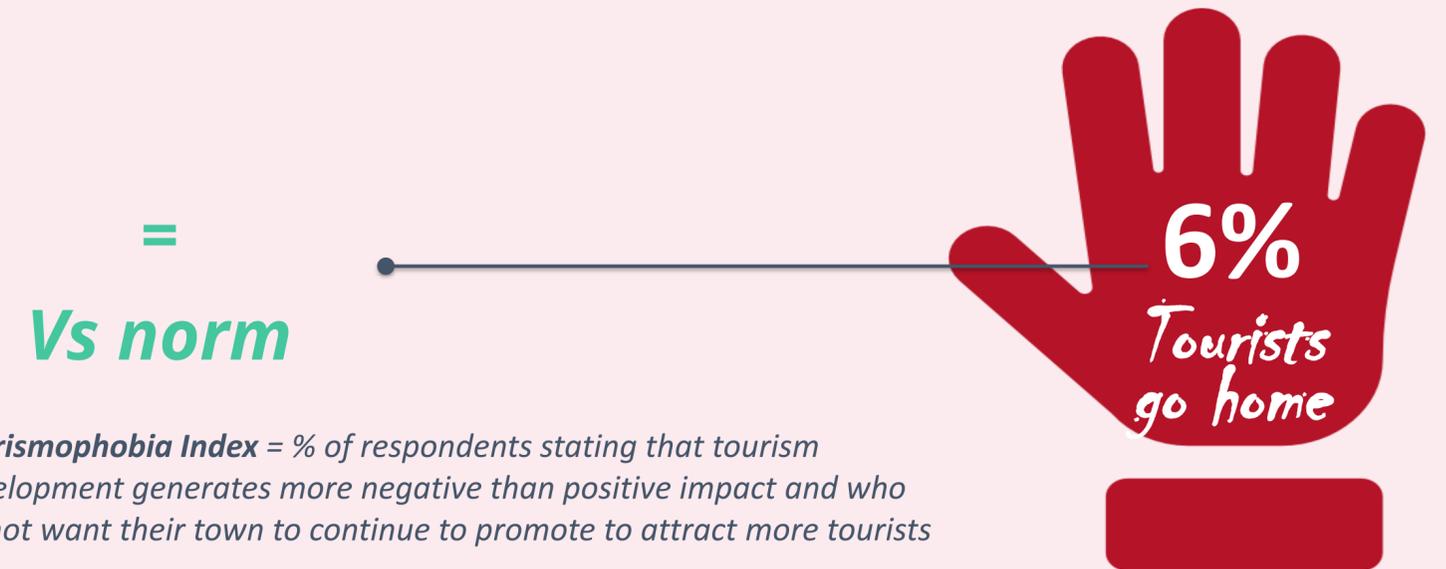
Key Resident Sentiment Index



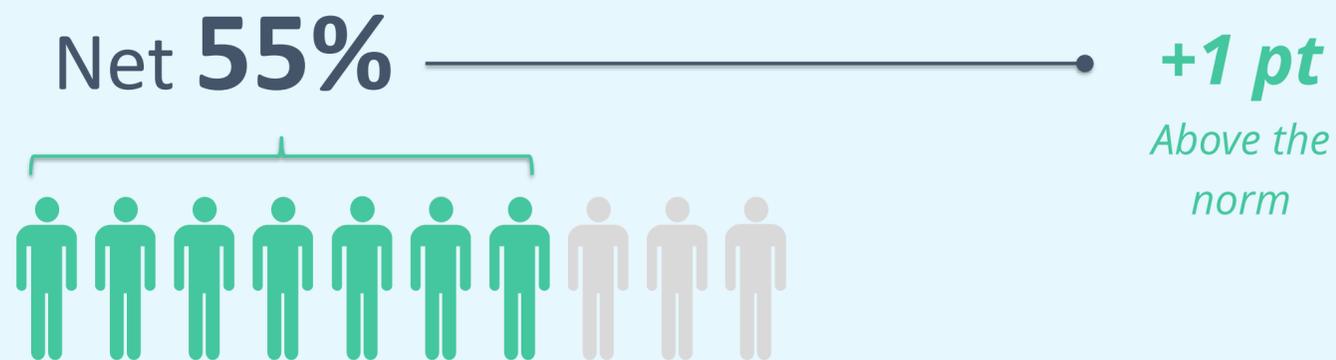
OVERALL TOURISM SENTIMENT INDEX



TOURISMOPHOBIA INDEX

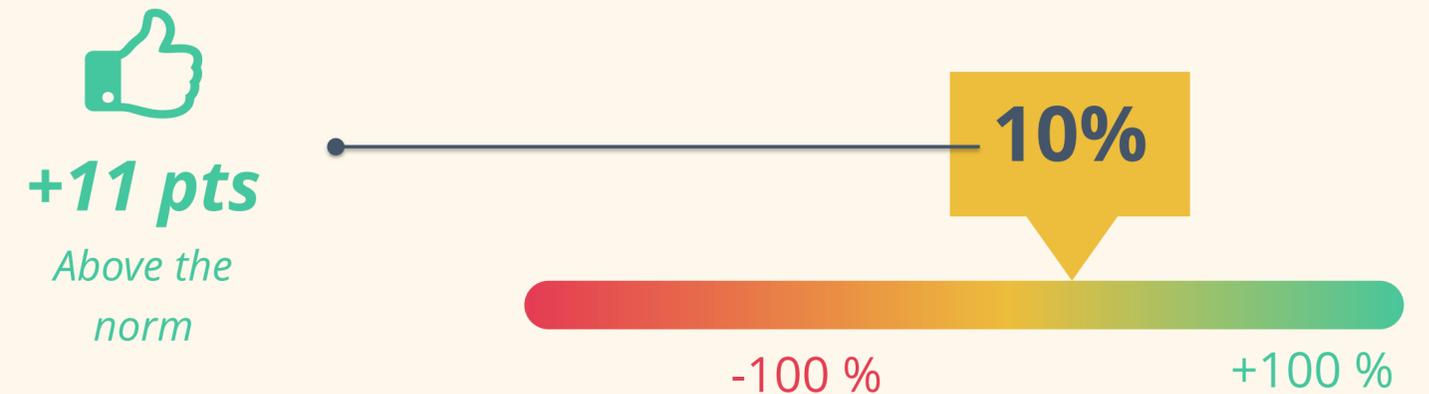


Growth Support Index = balance between respondents stating their town needs to continue to promote itself to attract more tourists and respondents stating the opposite opinion



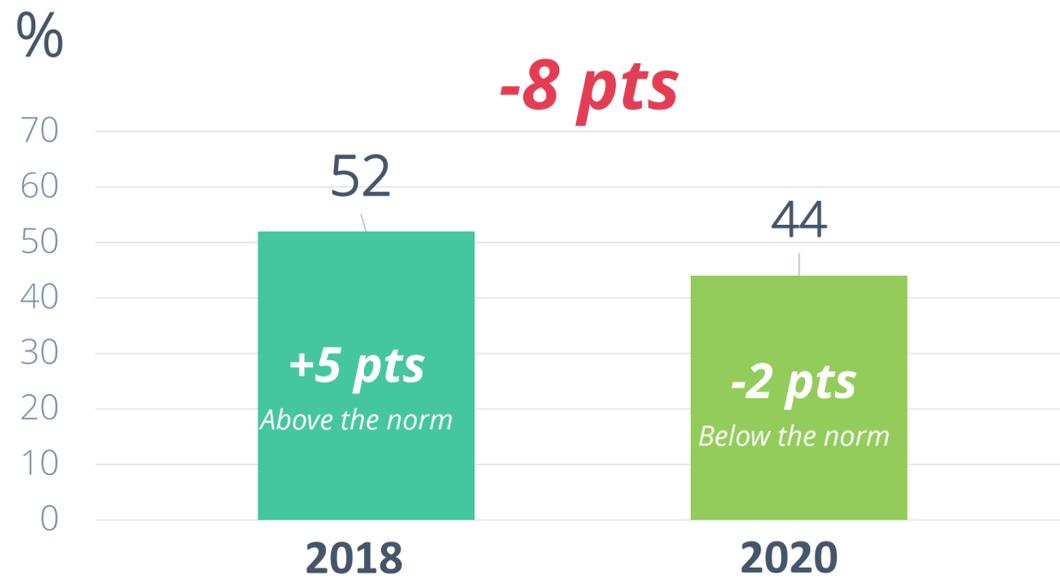
TOURISM GROWTH SUPPORT INDEX

Consideration Index = balance between respondents stating their town's tourism policy takes into account the impact on the life of locals and respondents stating the opposite opinion



RESIDENT CONSIDERATION INDEX

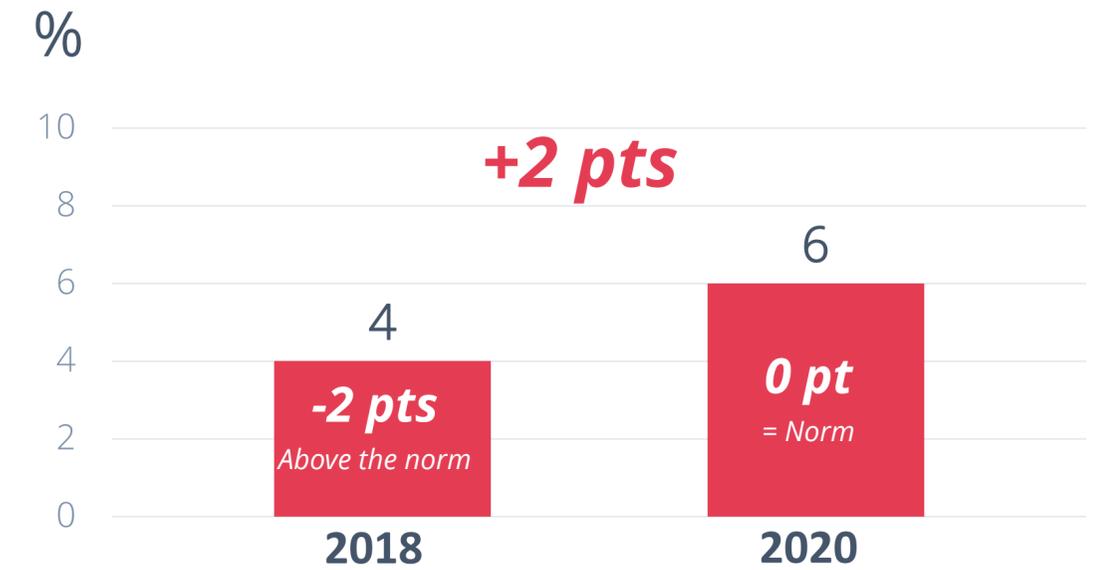
OVERALL TOURISM SENTIMENT INDEX



Net Sentiment Index =
balance between respondents stating that tourism development generates more positive consequences than negative and those stating the opposite opinion

Tourismophobia Index =
% of respondents stating that tourism development generates more negative than positive impact and who do not want their town to continue to promote to attract more tourists

TOURISMOPHOBIA INDEX



Growth Support Index =
balance between respondents stating their town needs to continue to promote itself to attract more tourists and respondents stating the opposite opinion

Consideration Index =
balance between respondents stating their town's tourism policy takes into account the impact on the life of locals and respondents stating the opposite opinion



TOURISM GROWTH SUPPORT INDEX

RESIDENT CONSIDERATION INDEX

Key Sentiment Indicators

The State of Copenhagen Residents' Sentiment

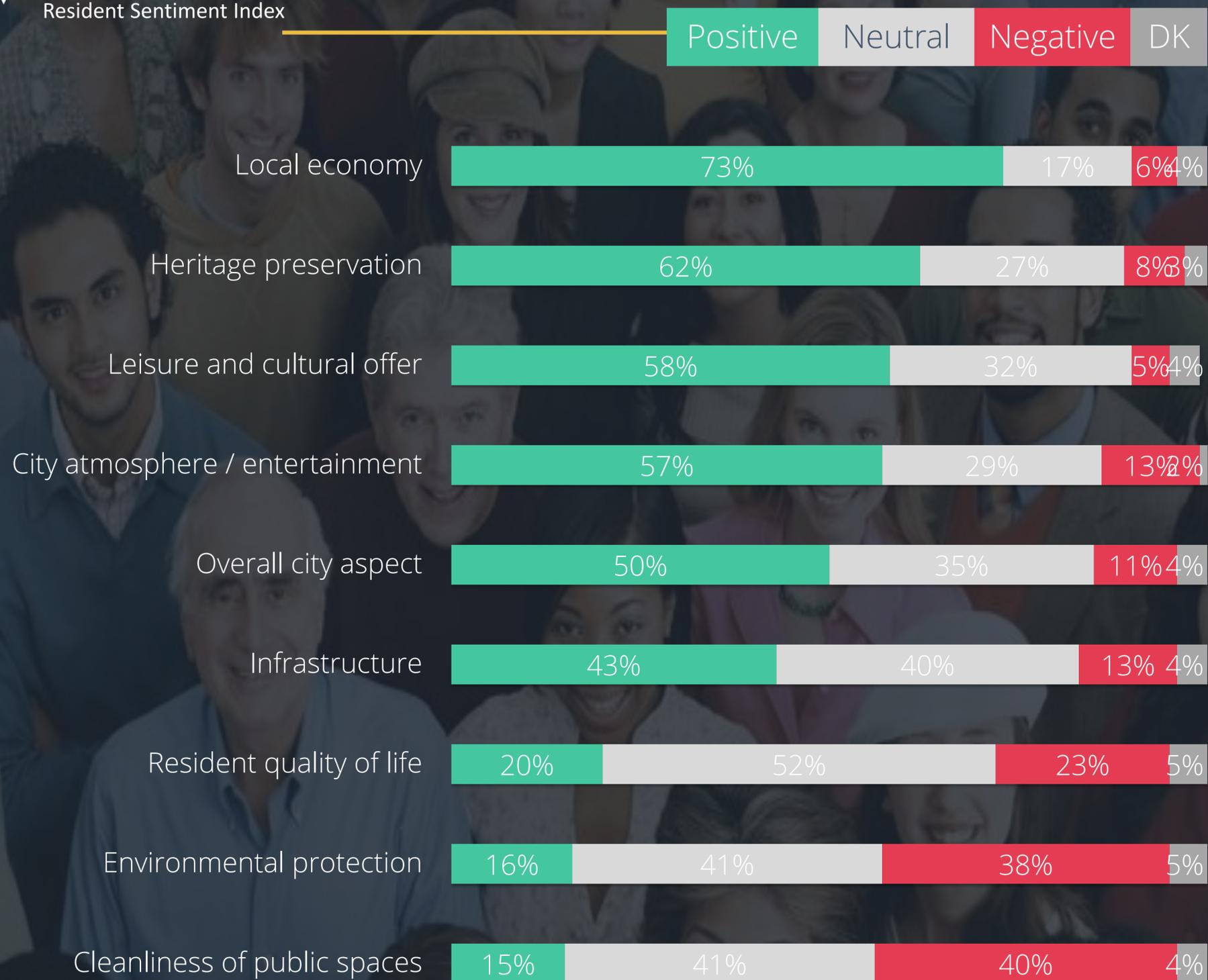
A still positive support towards tourism, but the sentiment has slightly declined

- KPIs of residents' sentiment are overall positive and in line with the Europe norms.
- However, the overall supportive sentiment shows some decline compared to 2018, except for the Resident "inclusive" feeling which remains better than the norm.
- Resident's majority still wants Copenhagen to promote but the share of tourism growth supporters have fallen in the population.



Tourism Impact Perception





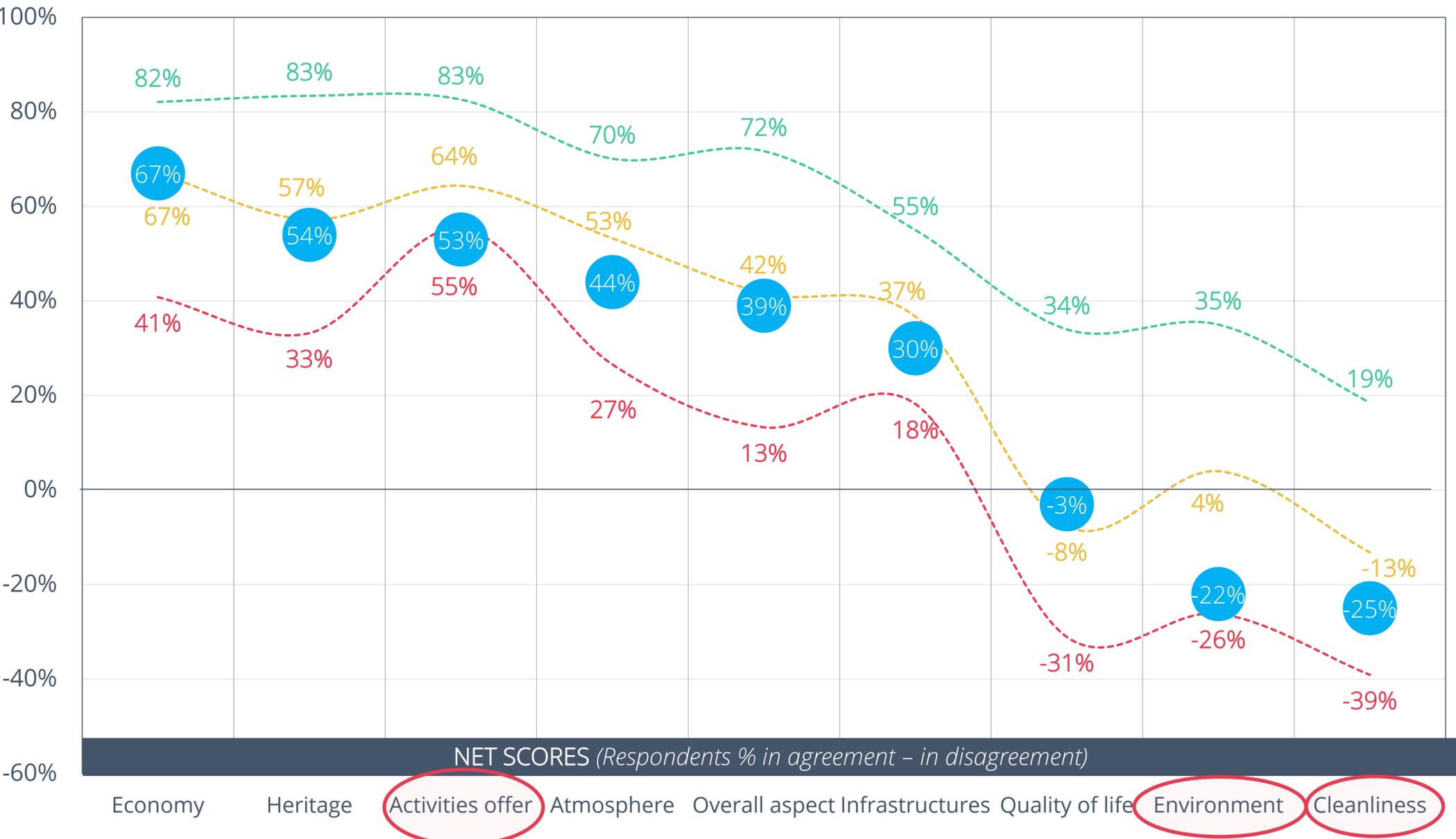
A focus on environmental impact and quality of life

- Tourism impact is seen as highly beneficial on local economy, heritage preservation, activities offer and city atmosphere.
- However, environment protection and cleanliness are strong concerns for Copenhagen residents.
- They also express a mix feeling about the tourism impact on their quality of life.

Definitions

Overall city aspect	<i>The general aspect of the town</i>
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City atmosphere / entertainment	<i>The atmosphere and entertainment in the town</i>
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● COPENHAGEN - - - Average cities - - - Min value - - - Max value



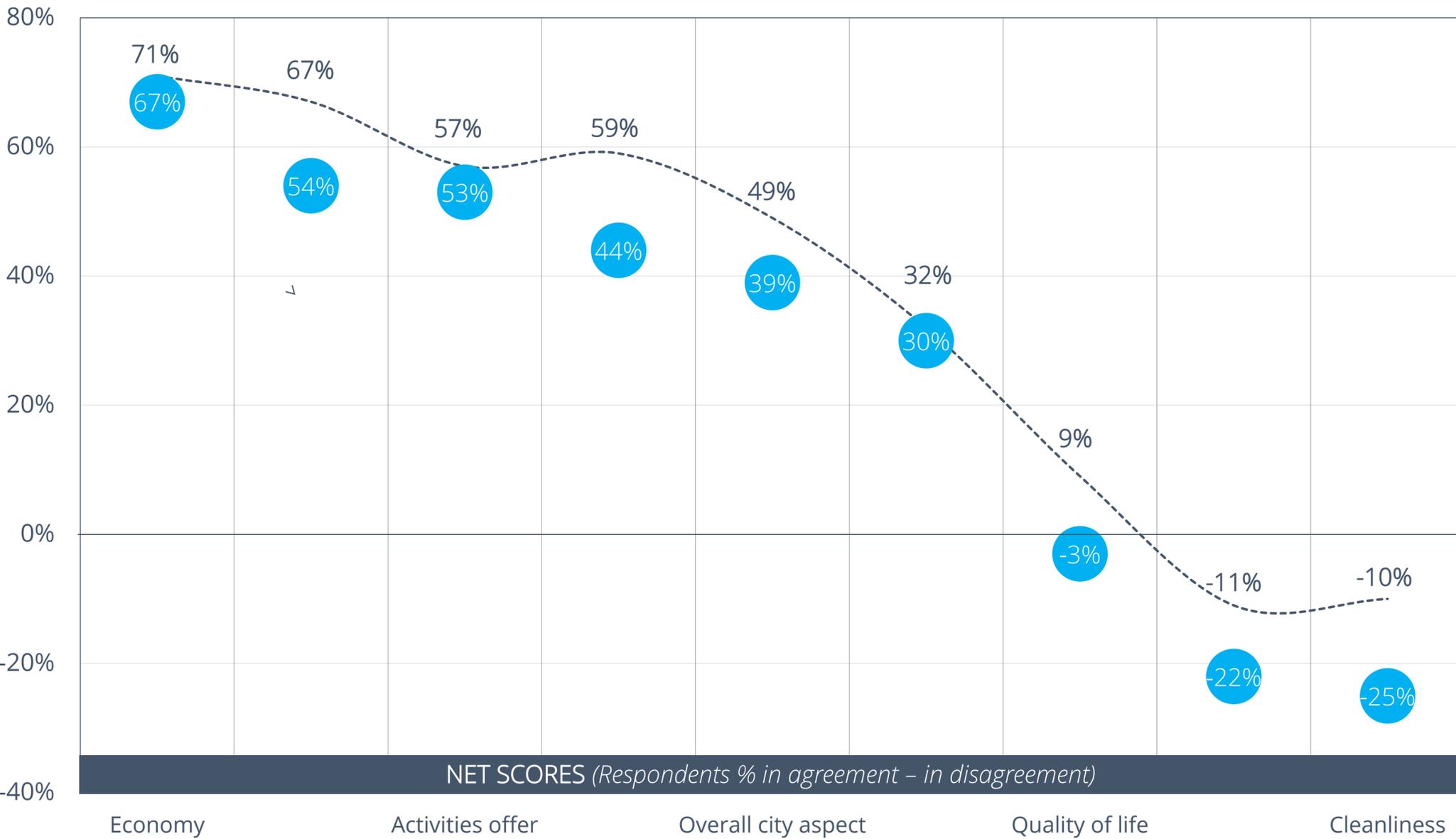
Environmental impact, a strong concern compared to the norms

- Most impact criteria measured are in line with the average city norms.
- Nevertheless, the impact on the environmental aspects (environment & cleanliness) is a stronger concern among Copenhagen residents compared to the average in Europe.
- The link to leisure and cultural activities is less obvious for Copnehagers vs norm.

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● 2020 --- 2018



The sentiment has eroded for most aspects

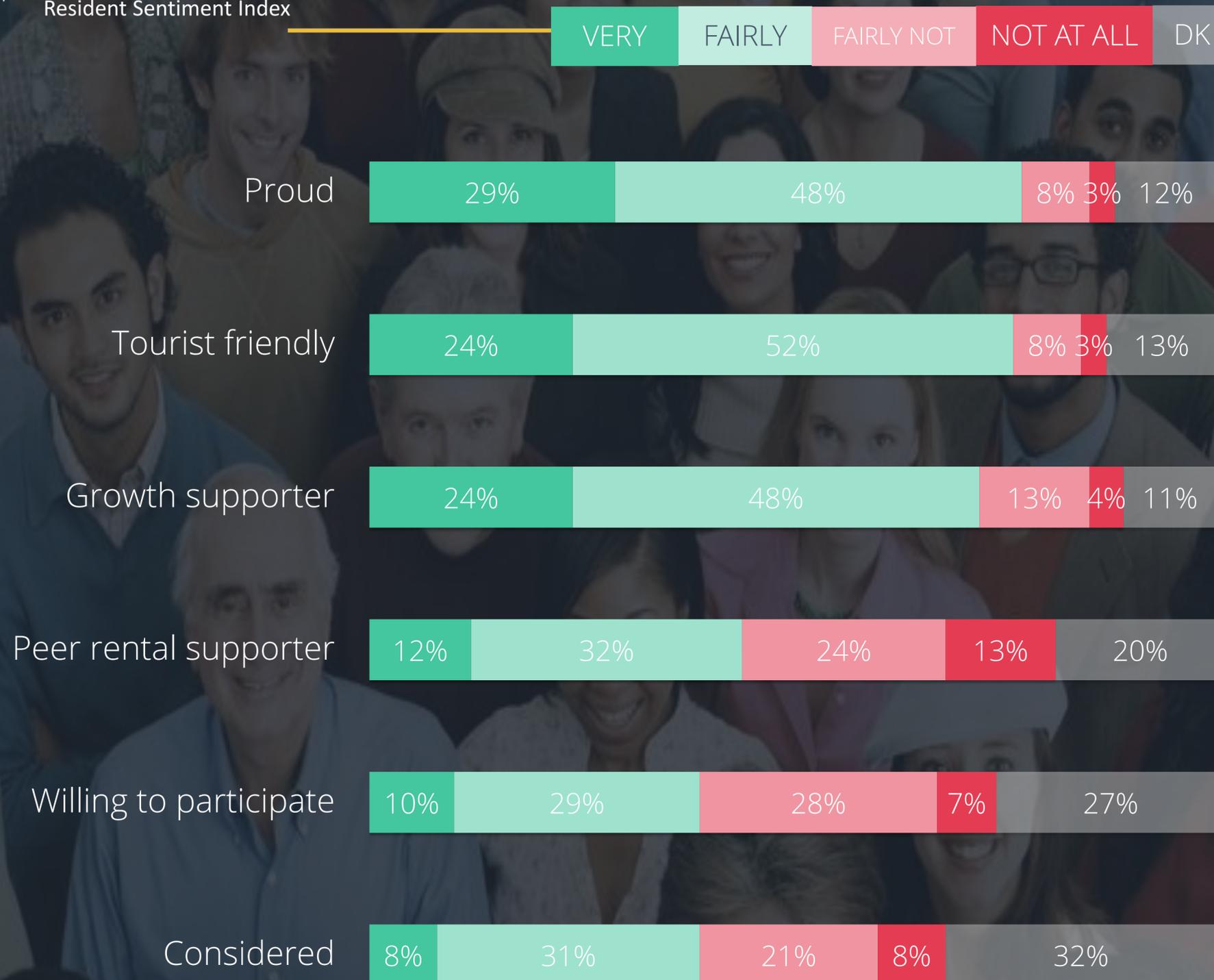
- Most sentiment dimensions are less well rated vs 2018.
- Tourism impact on environment and quality of life are the three most cleaving dimensions in the population.

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Resident Mood



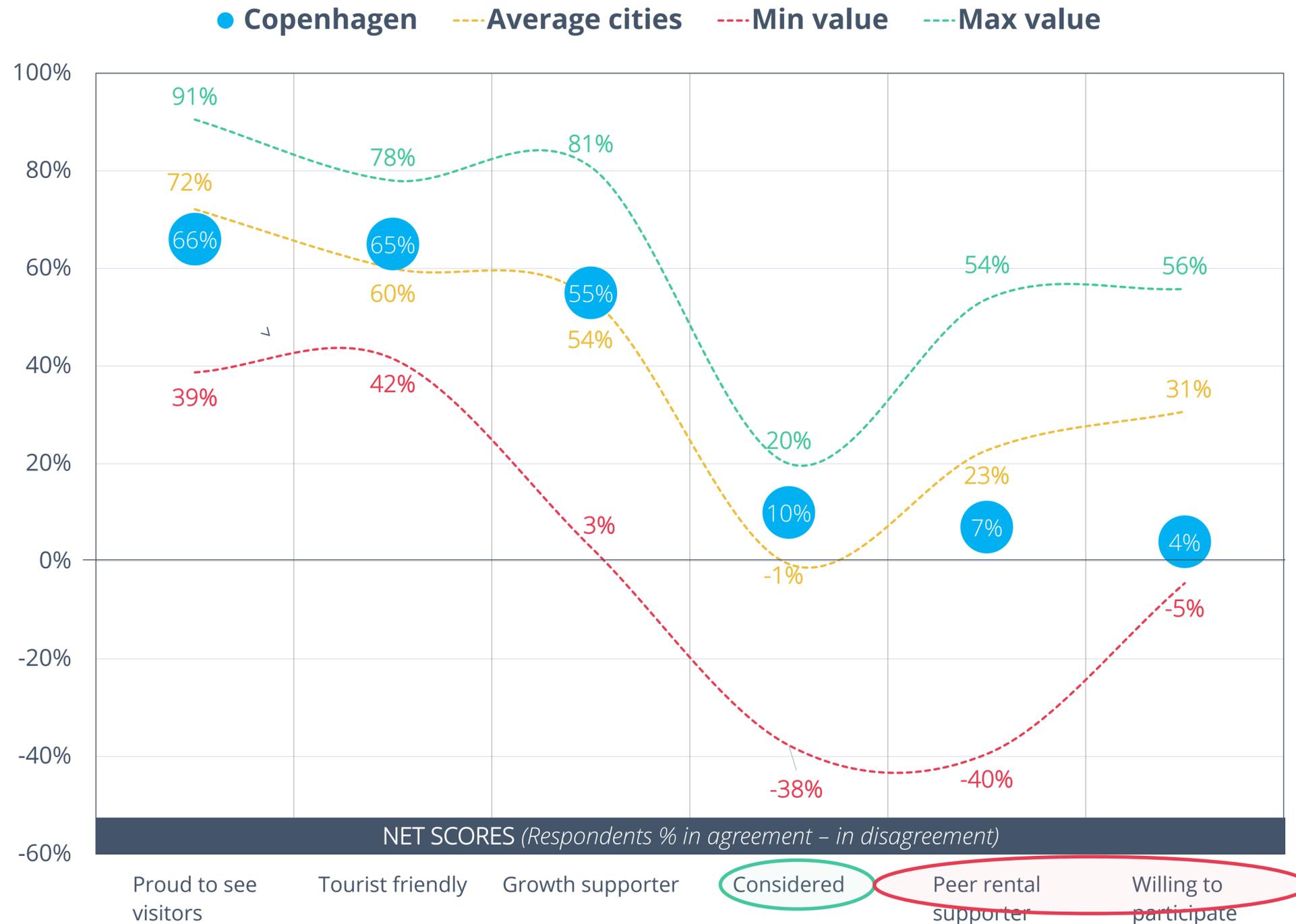


Resident still proud to see visitors but commitment remains limited

- Residents are clearly proud to see tourists in their city. They are happy to give them tips and think Copenhagen still needs to promote itself.
- Nevertheless, they do not show a very strong engagement overall.

Definitions

Considered	<i>My town's tourism policy takes into account the impact on the life of locals</i>
Willing to participate	<i>I would like to be more involved in decisions concerning tourism in my town</i>
Peer rental supporter	<i>The development of private accommodation on offer (such as Airbnb, Homestay, etc.) is good for my town</i>
Tourist friendly	<i>I like to give tourists advice and tips</i>
Growth supporter	<i>My town needs to continue to promote itself to attract more tourists</i>
Proud	<i>I am proud to see tourists who have come from far away to visit my town</i>



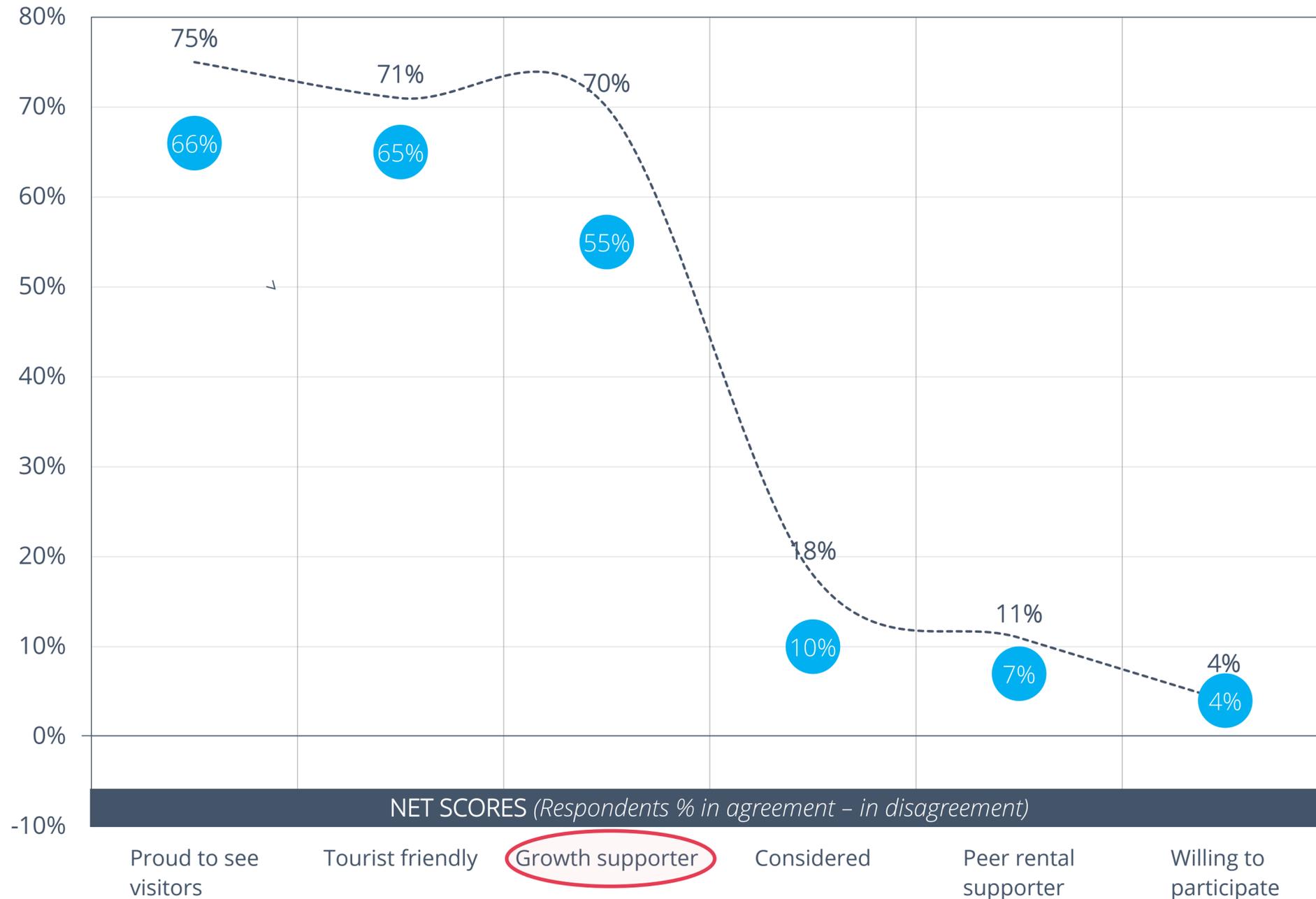
A moderate willingness to participate

- Residents are less willing to participate in tourism decisions compared to average in Europe.
- Nevertheless, they are more to state their say is considered in tourism decisions.
- They are in line with other cities regarding their pride to see tourists, their friendly attitude and their acceptance to promote the city.
- They tend to be less supportive of peer rental (-16 pts Vs the norm).

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● 2020 --- 2018



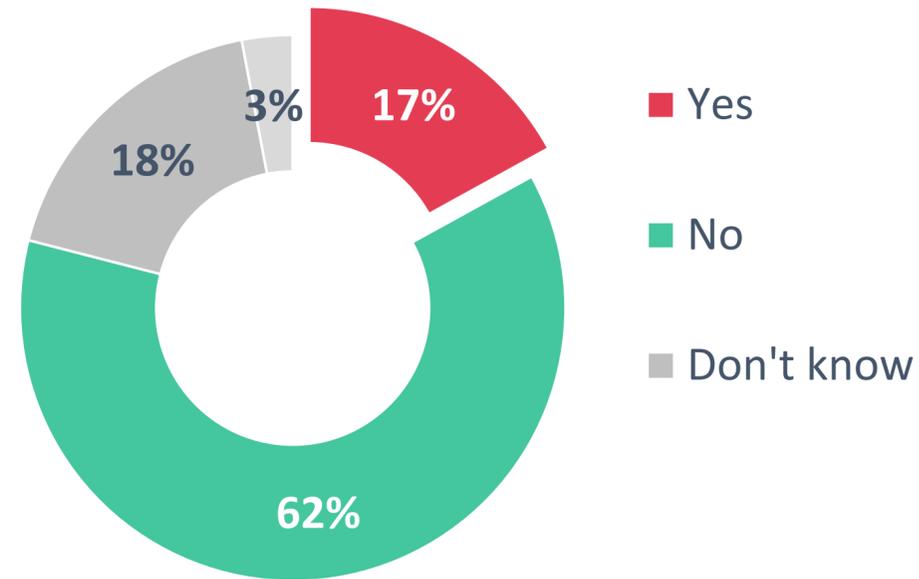
A supportive attitude overall, but growth less consensual

- Though a significant majority of Copengahers are still growth supporters, the decline of growth supporters vs 2018 questions the consensus about managing the flow/dispersion of visitors over time and spaces.

Definitions

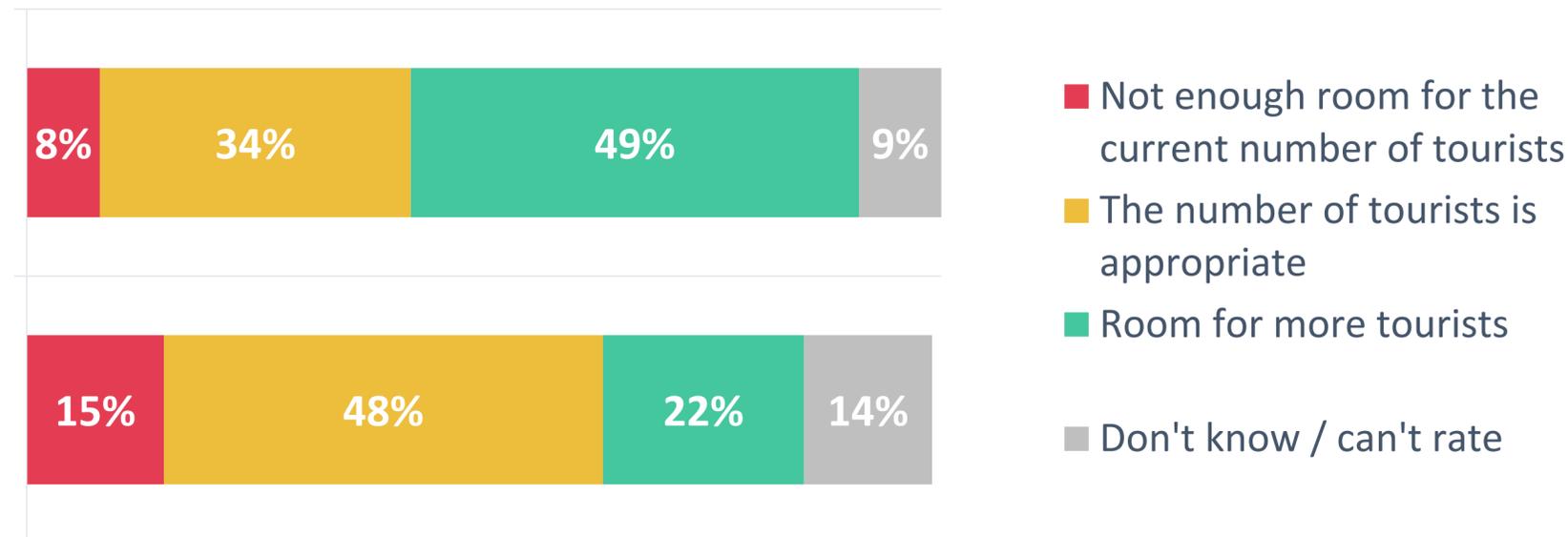
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Is Copenhagen affected by overtourism?



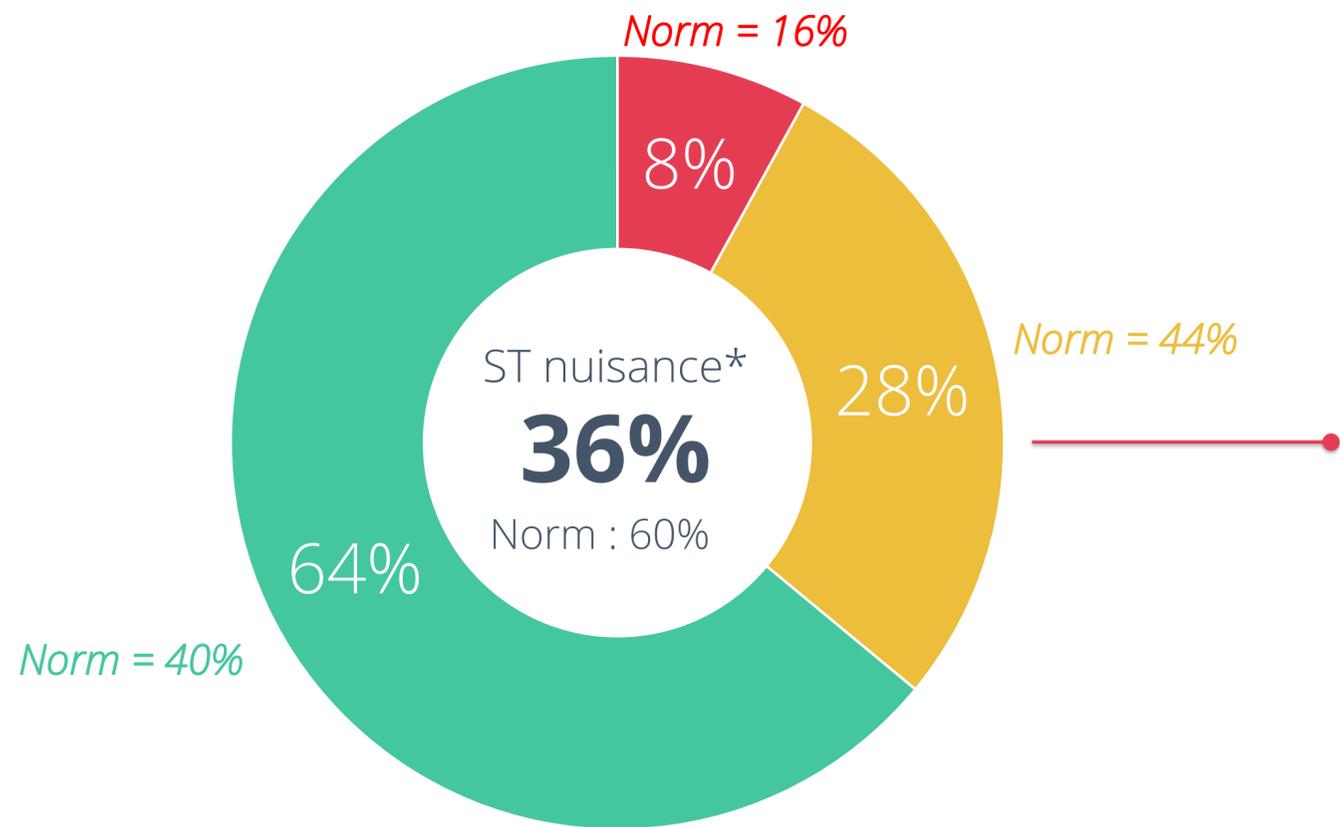
“Aware” of overtourism, more than “living” overtourism

While 1 in 6 residents considers Copenhagen is affected by overtourism, the balance of tourism “where I live” is still appropriate most a vast majority of them. Overtourism is a societal concern about the city as a whole, more than a daily problem for most inhabitants.



Seasonality and typology of nuisances

Seasonality perceptions

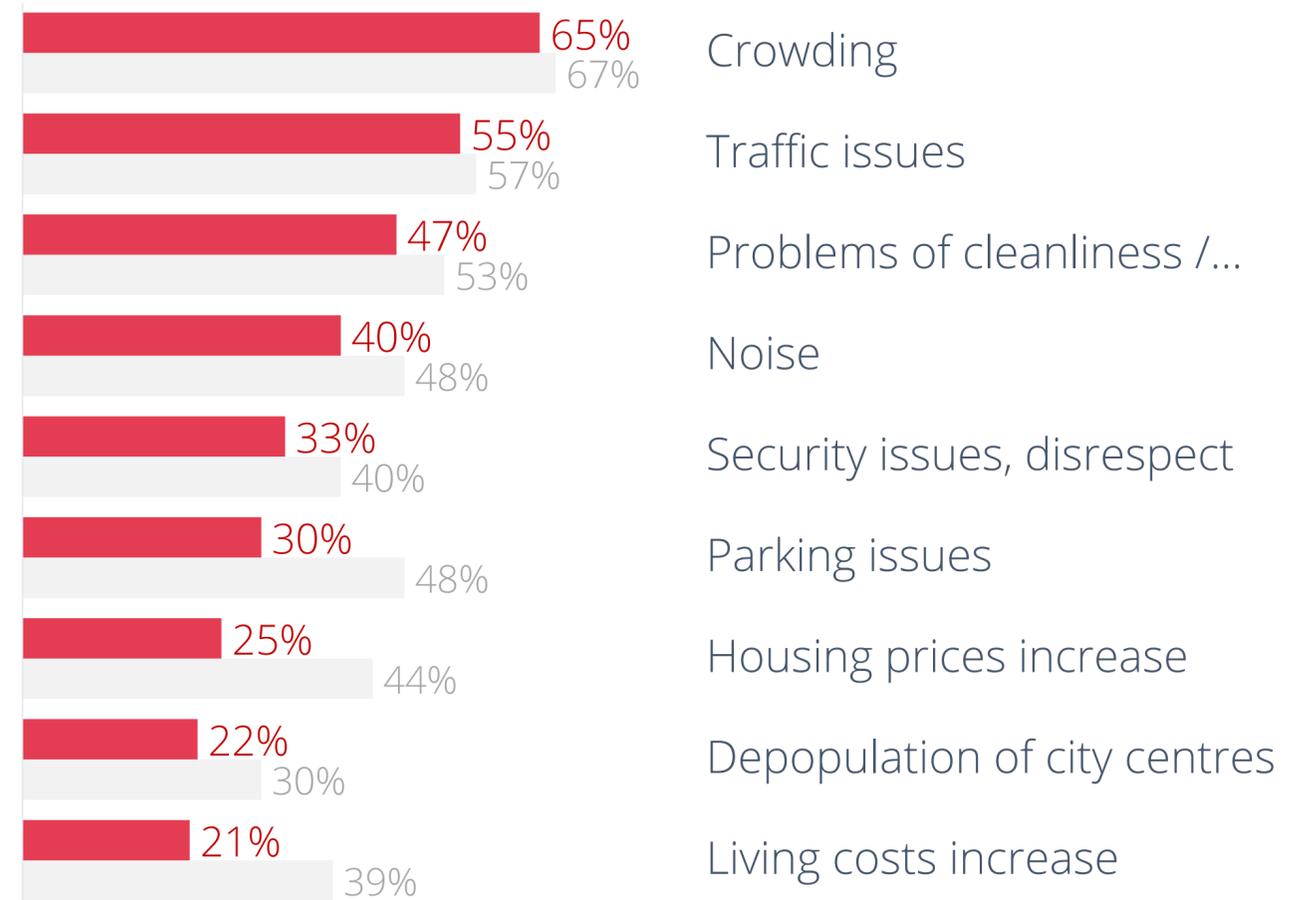


- Problems throughout the whole / most of the year
- Problems at certain times of the year
- No problems

*At least part of the year

Nuisances

What type(s) of problems does tourism cause in your city?



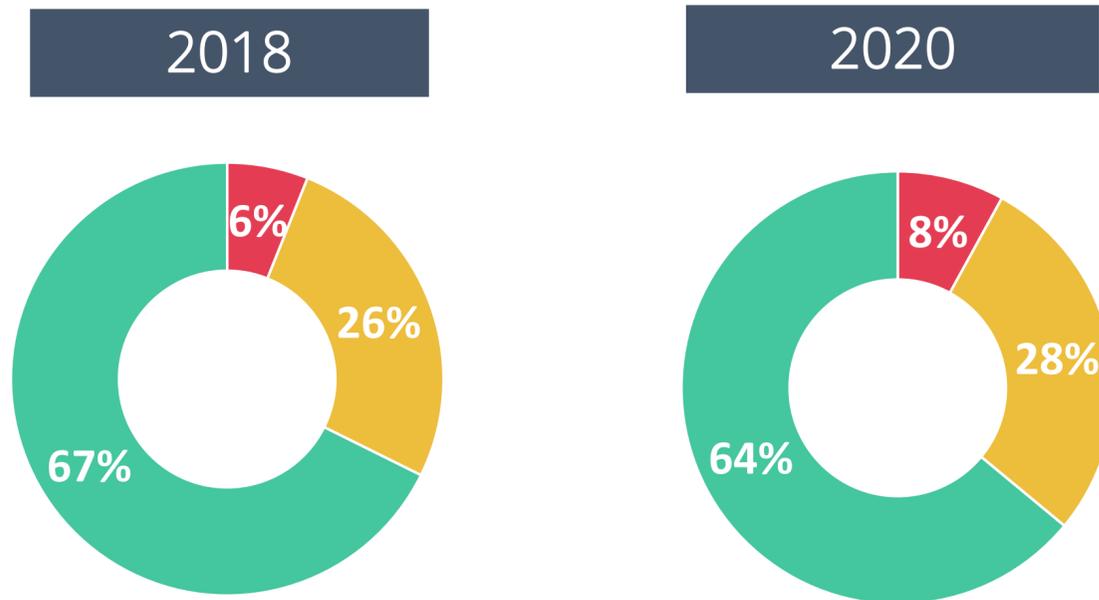
Base: Residents stating nuisances (N=542)

■ Copenhagen ■ Norm

Evolution 2020 / 2018

Seasonality perceptions

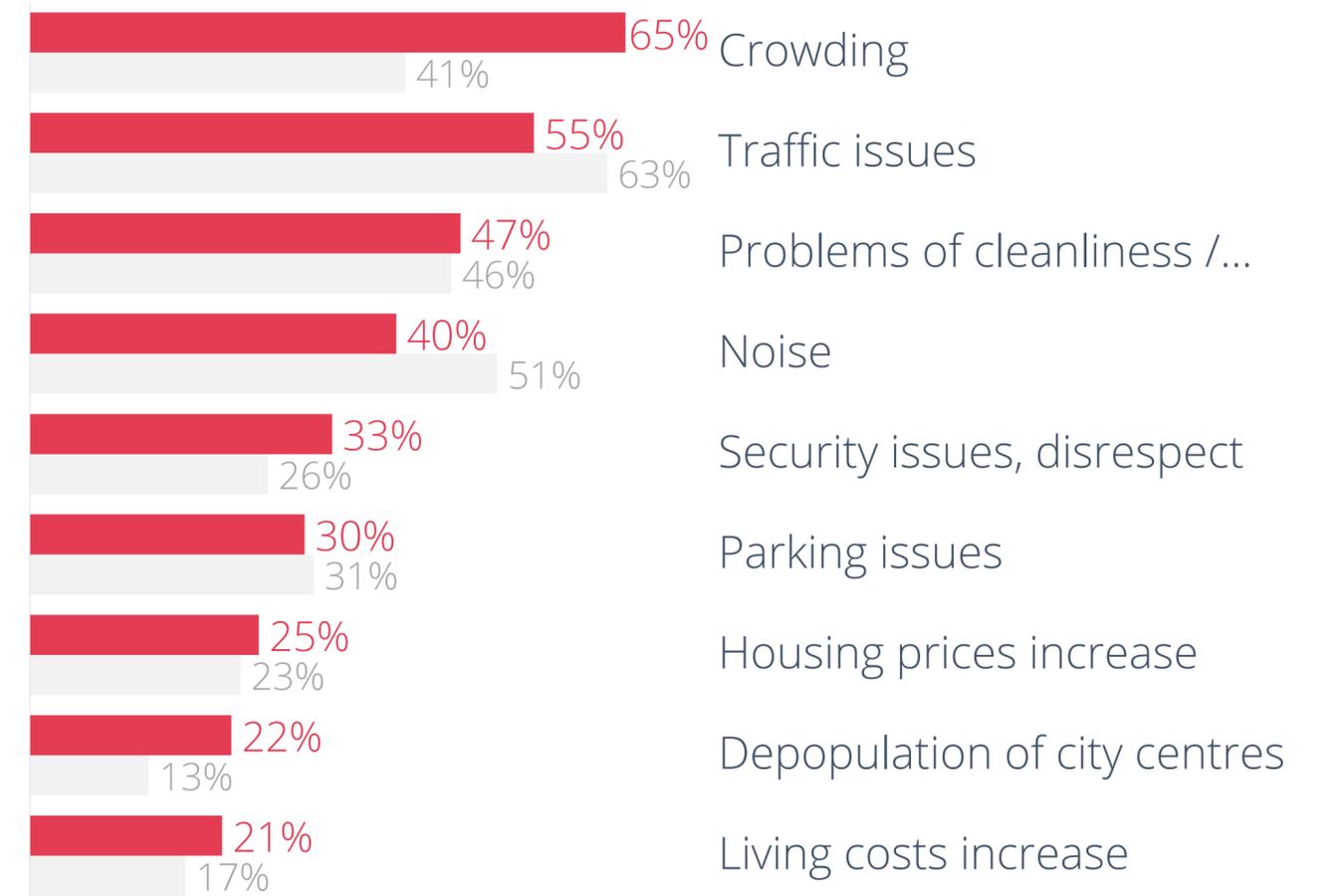
% Problems throughout the whole year / at certain time in the year



- Problems throughout the whole / most of the year
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Nuisances

What type(s) of problems does tourism cause in your city?



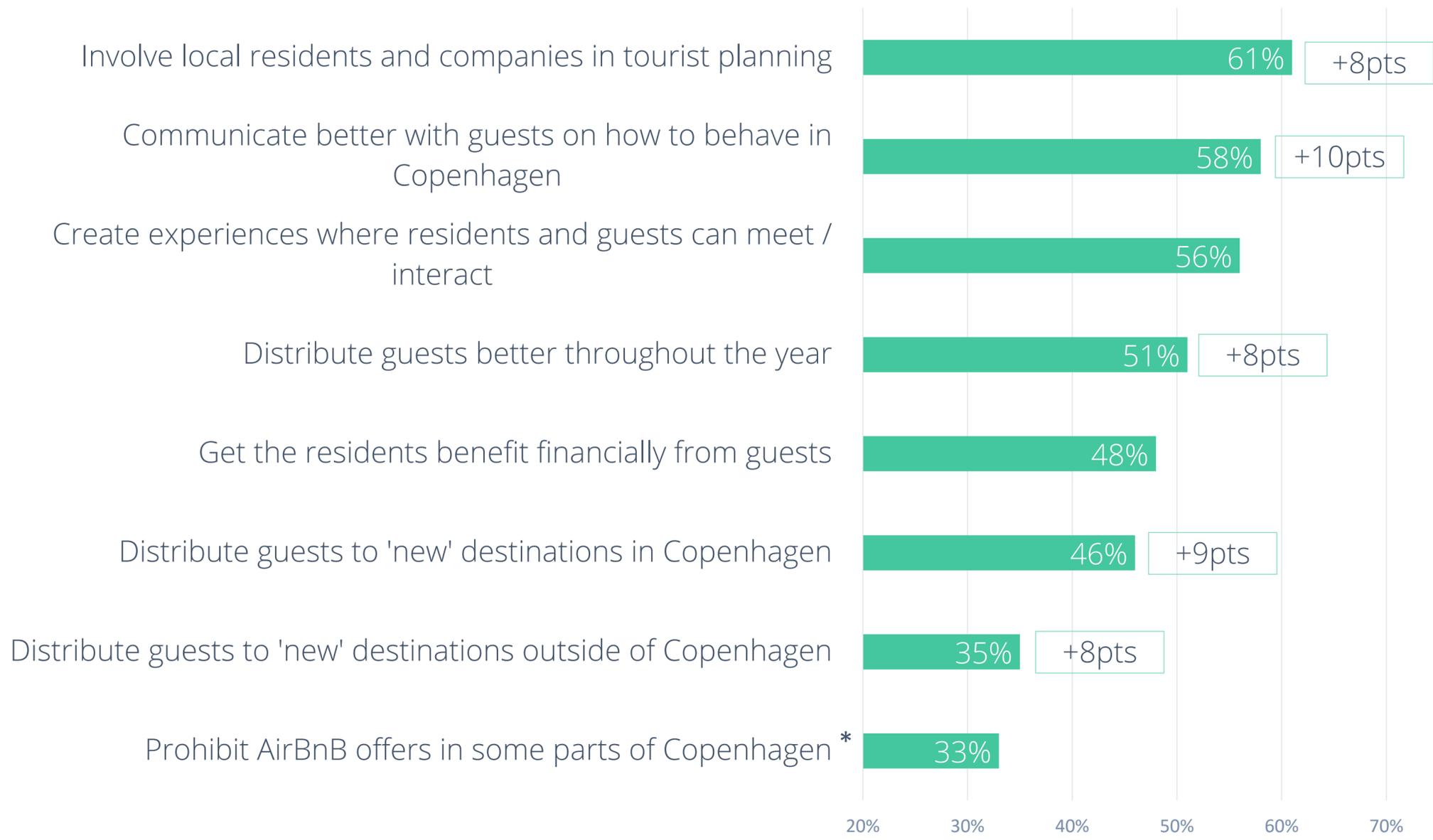
Answers among residents stating problems (N=542)

■ 2020 ■ 2018

Priorities seen on Tourism planning

What options do CPH Residents prefer?

Selected 4 or 5 on a 1-5 agreement scale



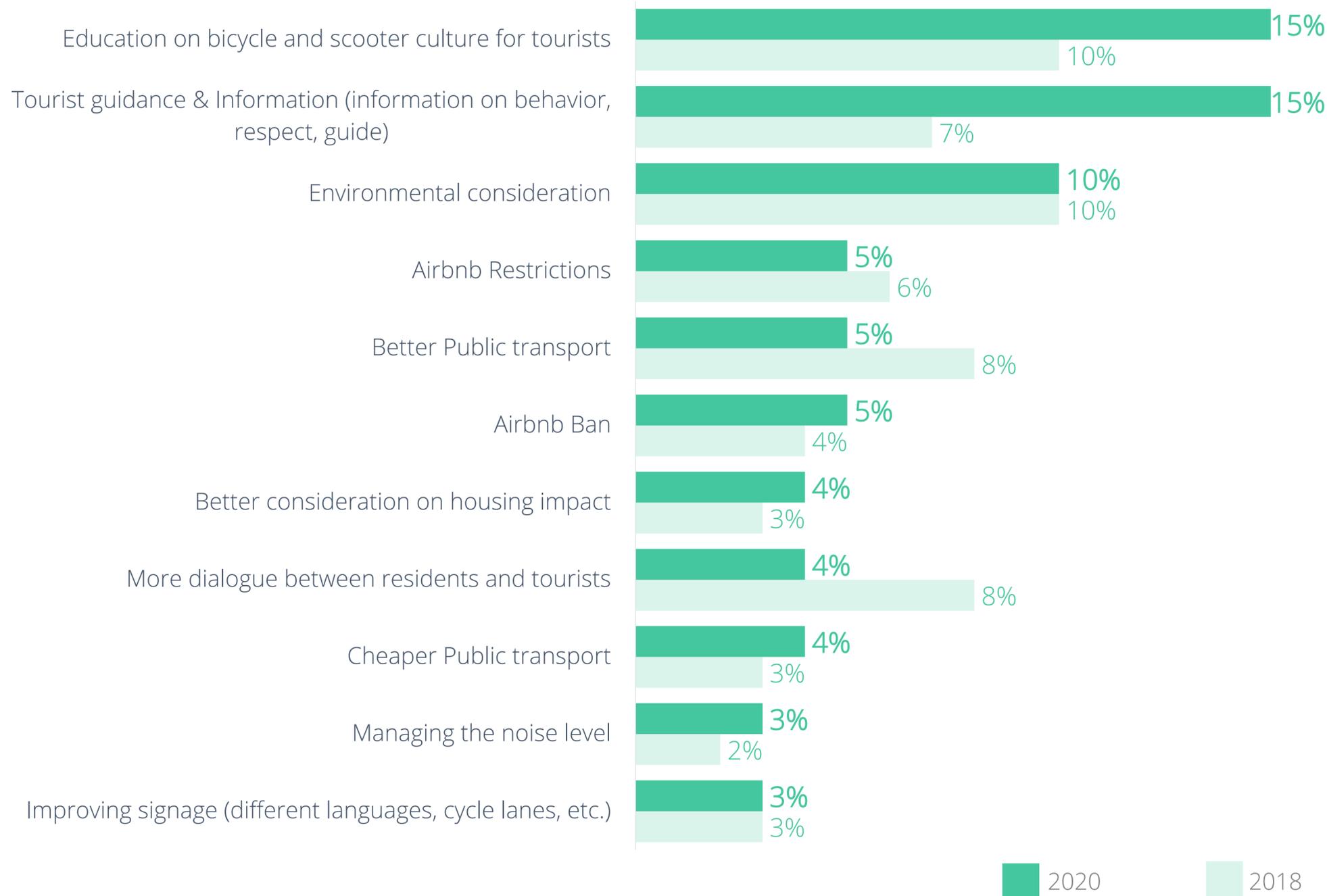
Residents more receptive to initiatives on tourism planning

Main expectations concern a **stronger involvement** of residents and companies in the **tourism planning**, a campaign to **raise tourist' awareness** on how to behave in Copenhagen and a **better distribution** of tourists throughout the year as well as outside Copenhagen.

* The statement formulation was different in 2018.

Residents expectations

Spontaneous mentions



Clear rules for better “living together” With tourists

- Better information on **cycling rules, general behavior and environmental consideration** could improve the way Copenhagen tourists are perceived by local residents.
- **Airbnb restrictions & Airbnb regulations** are also popular in comments, though the general attitude remain supportive as mentioned earlier.
- Tourism perception could benefit from a **better tourist distribution across the city’s area**.

New mentions in 2020:

- **Better tourists distribution across city’s area** → 7%
- **Limit the number of tourists / Too many tourists** → 4%
- **Prohibit / restrict bicycle and scooter to tourists** → 4%

Open end question - % of mentions that include the dimension

They said it!

Selection of resident testimonials

"Give guests better information on public traffic, Get rid of electric bikes and scooters for tourists, they don't know the traffic rules..."

"... I wanted to participate in something like 'Show a tourist your city!' - It would be fun and exciting to share knowledge you cannot read as a tourist."

"Restriction on Airbnb so that it is not professionalized but is real sharing economy."

"Due to tourism, it is now harder to find apartments due to Airbnb. Some stricter rules should be made regarding this"

"Distribute the tourists in different districts"

"Even better logistics - public transport does not necessarily have to be free, but fares should be somewhat lower"

"One must be informed as to how much it can help to develop economy in the city if tourism is developed."

"That we get to know each other better."

"No cruise ships, even with large buses and tourists"

"Noise and noise"

"A guide on how to behave in Denmark."

"No buses in the historic city center, but otherwise good parking for the buses so that they are not in the way of ordinary traffic."

"More trash cans and information on keeping the city clean"

"Big events should be spread all over the city so it is not always the same residents who are locked in when, for example, Frederiksberg is all closed time and time again over the summer."

"Limit the number of tourists during certain peak periods and distribute the number of tourists over more of the year"

"Clear rules about what they must and must not do"

"Prohibit scooters"

"information in different languages"

"Traffic information for tourists renting bicycles or electric scooters. I often experience potentially dangerous situations, especially in traffic lights."

"Stop renting bicycles for tourists - they drive everywhere and endanger pedestrians"

"In the summer of the year I can not walk with my dogs on the sidewalk at all because of large groups of tourists and scooters parked on the sidewalk."

"Limit the number of tourists allowed per week. Introduce tourist tax for cleaning and maintaining the city."

"Airbnb should not be legal"

"Love the Copenhageners ... Respect the Copenhageners Copenhageners are Copenhagen, not buildings and statues "

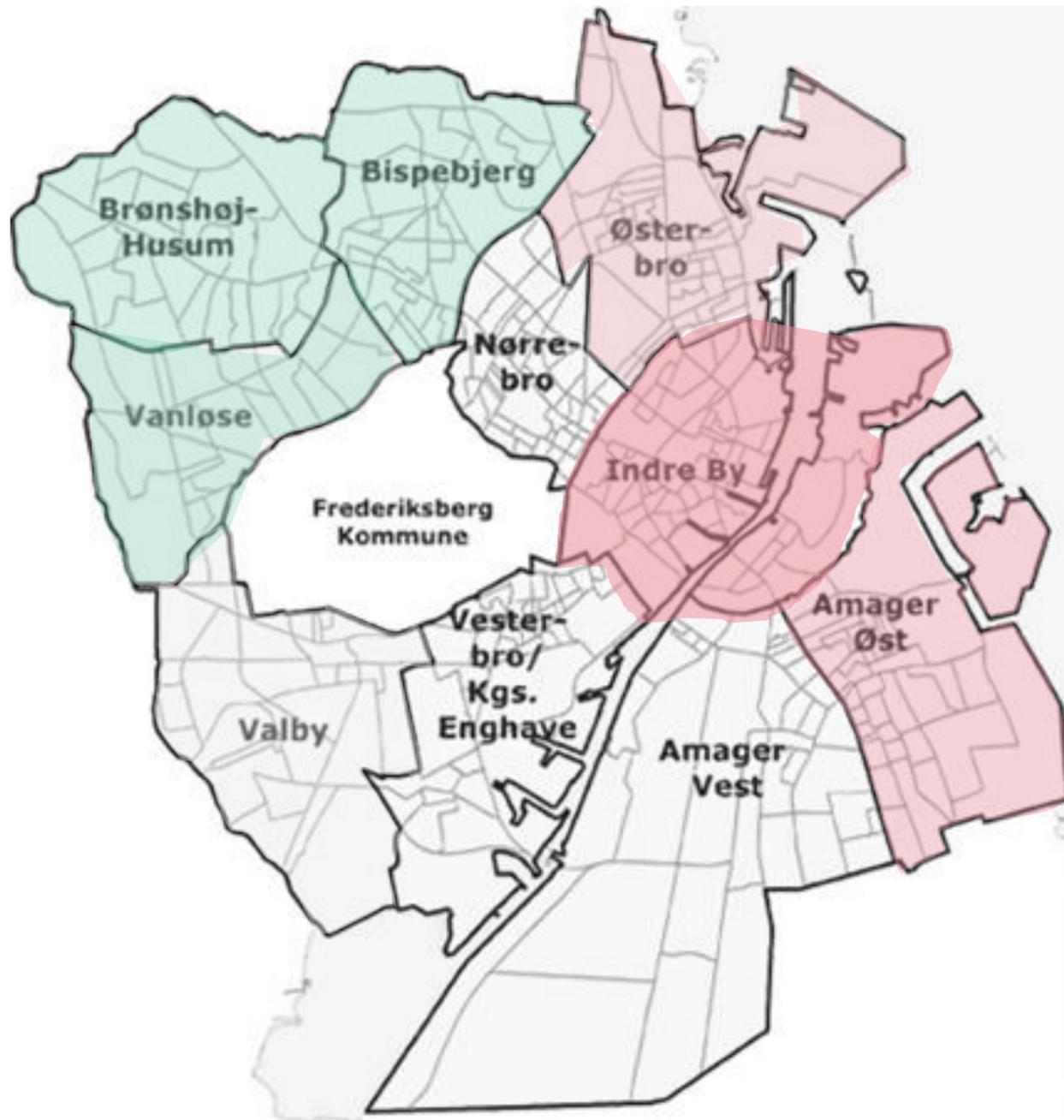
"There are many students in kbh without housing - on the other hand there are also many airbnb that are rented out to tourists - where instead they could have been student housing"

"Better public transport options for tourists"

" Better info on trash sorting in multiple languages»"

Tourism Sentiment level by districts





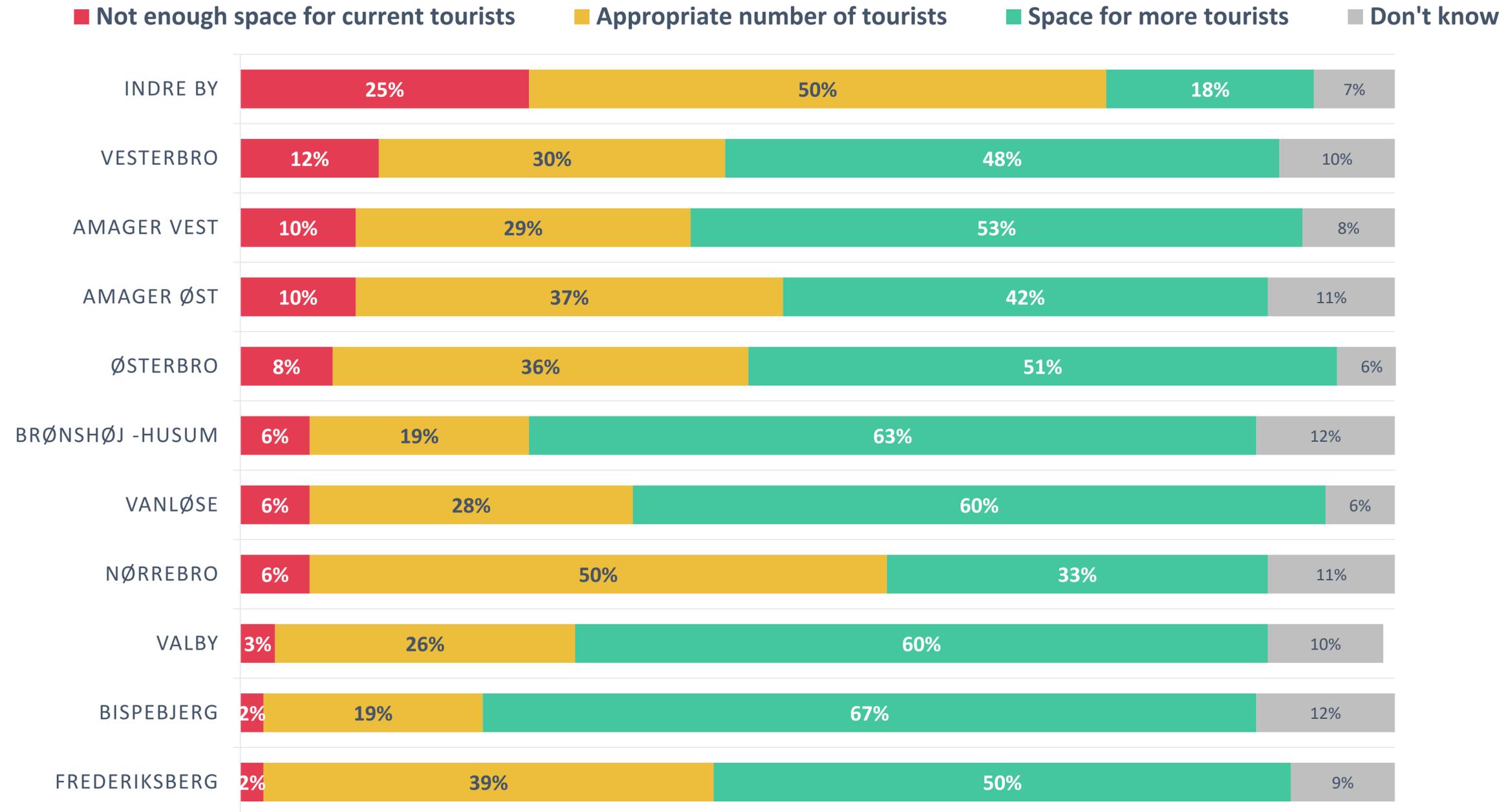
Indre by on the watch list!

Residents in the old district express are the least supportive to tourism growth. We observe also a “diffusion” of the sentiment in neighboring areas Amager Ost and Osterbro. More remote areas from the center –especially in the North) seem showing a positive sentiment towards tourism overall.

	Overall Sentiment	Tourism Growth Support	Impact on quality of Life	Perception of overtourism
<i>Average areas</i>	44%	55%	-3%	17%
Indre by	39%	39%	-7%	35%
Vesterbro	41%	52%	-4%	16%
Nørrebro	42%	50%	-3%	17%
Østerbro	30%	47%	-9%	21%
Amager Vest	45%	71%	-4%	18%
Amager Øst	40%	47%	-10%	20%
Valby	57%	58%	-3%	19%
Vanløse	53%	55%	6%	12%
Brønshøj -Husum	47%	64%	8%	14%
Bispebjerg	57%	73%	2%	12%
Frederiksberg	44%	56%	-1%	16%

Perception of Tourism Levels in my District

Think about the level of tourists in your local area over the past year. Please state the statement that best fits your attitude.



Indre By Focus



How does Indre By compare Vs Copenhagen overall?

● INDRE BY - - - COPENHAGEN



A focus on heritage and environment preservation

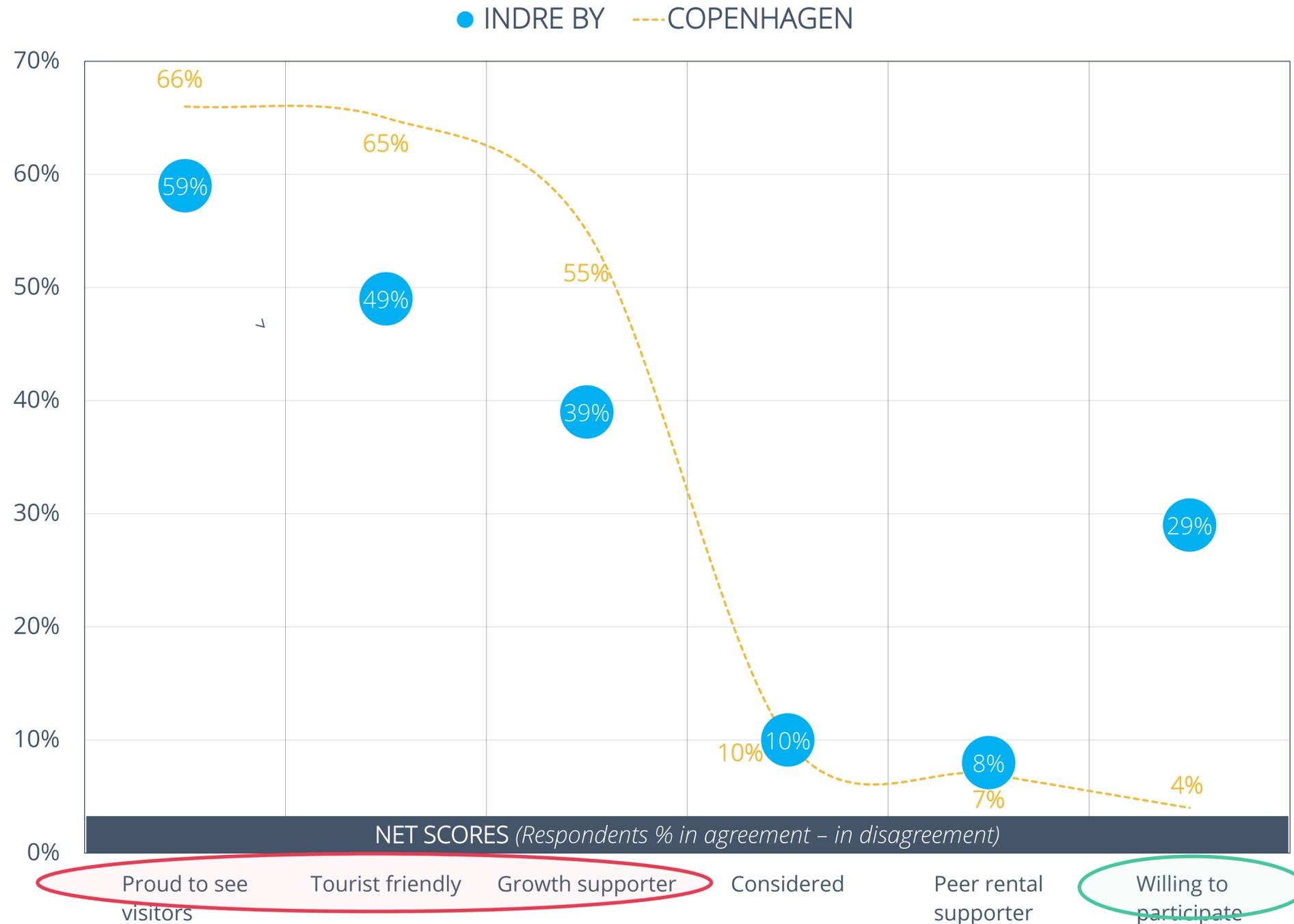
Tourism impact in Indre By remains overall positive for the majority of its inhabitants, but the sentiment about heritage preservation and overall cleanliness is more challenged.

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Resident Mood - Benchmarking

How does Indre By compare Vs Copenhagen overall?



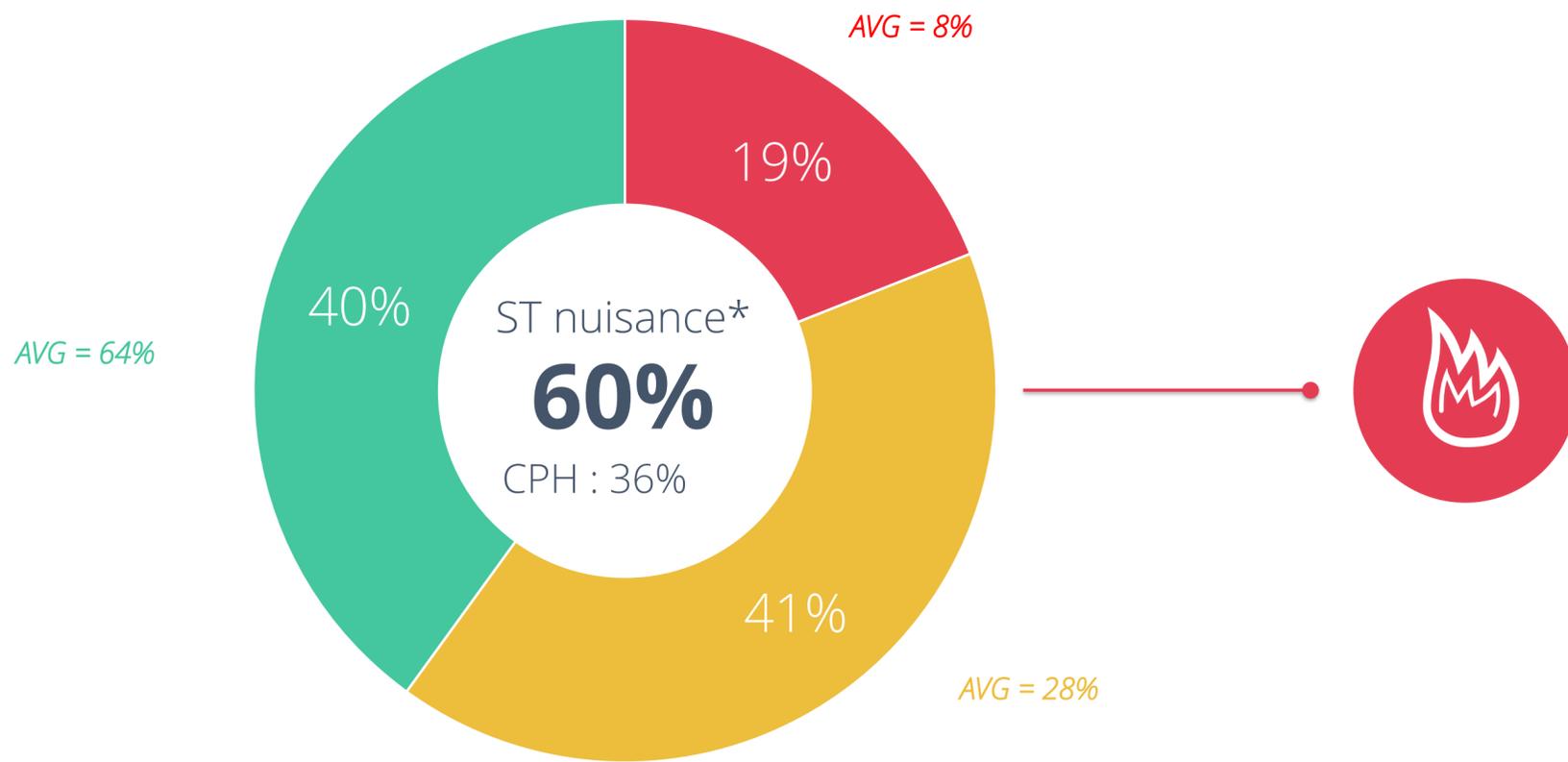
A feeling of Tourism fatigue?

The Indre By residents' mood overall is positive but suggests part of inhabitant have some "fatigue" about tourism growth. Still the willingness to participate is high, offering space for collaborative approaches to keep the sentiment high in the future.

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Seasonality perceptions

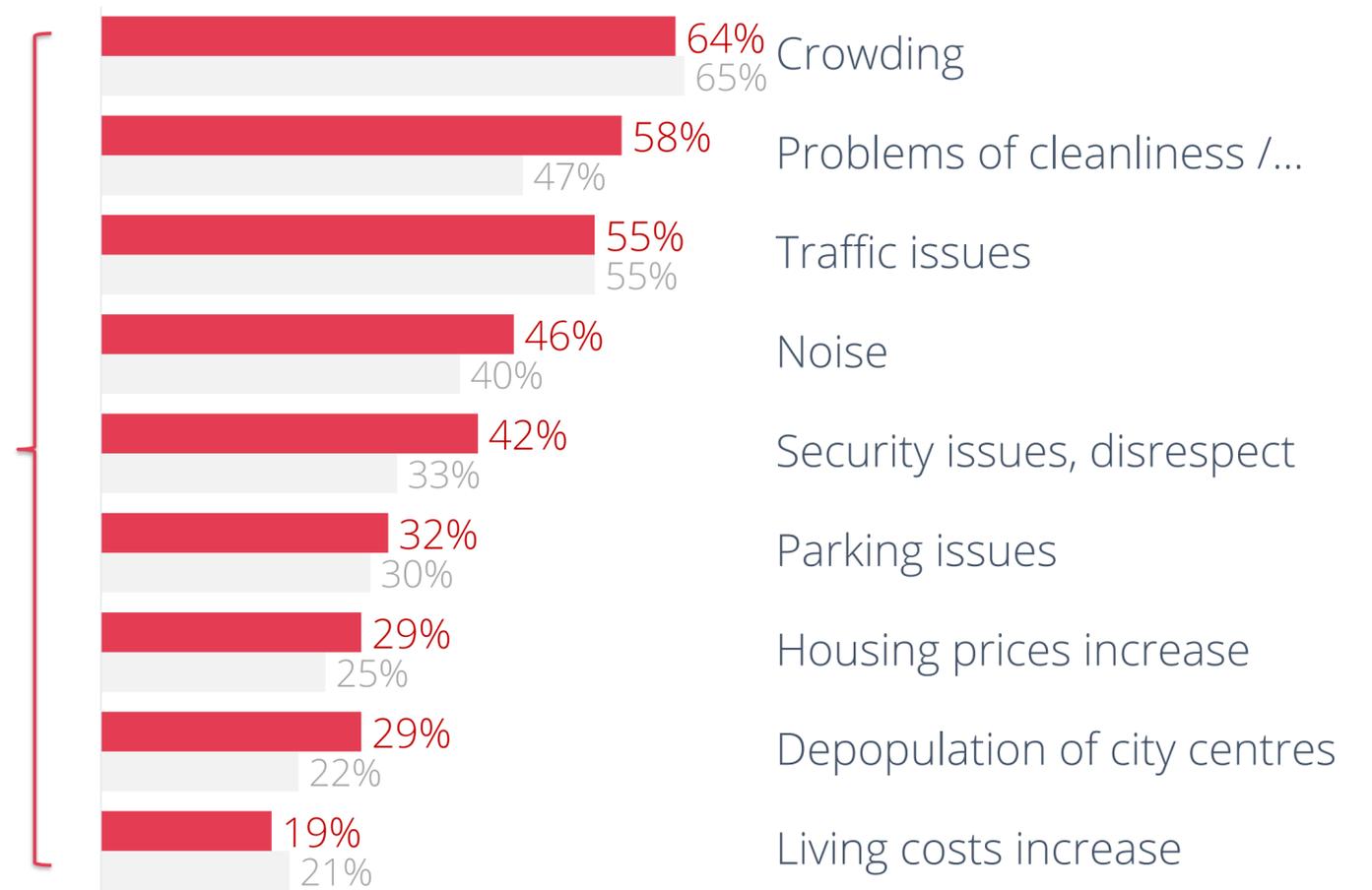


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Nuisances

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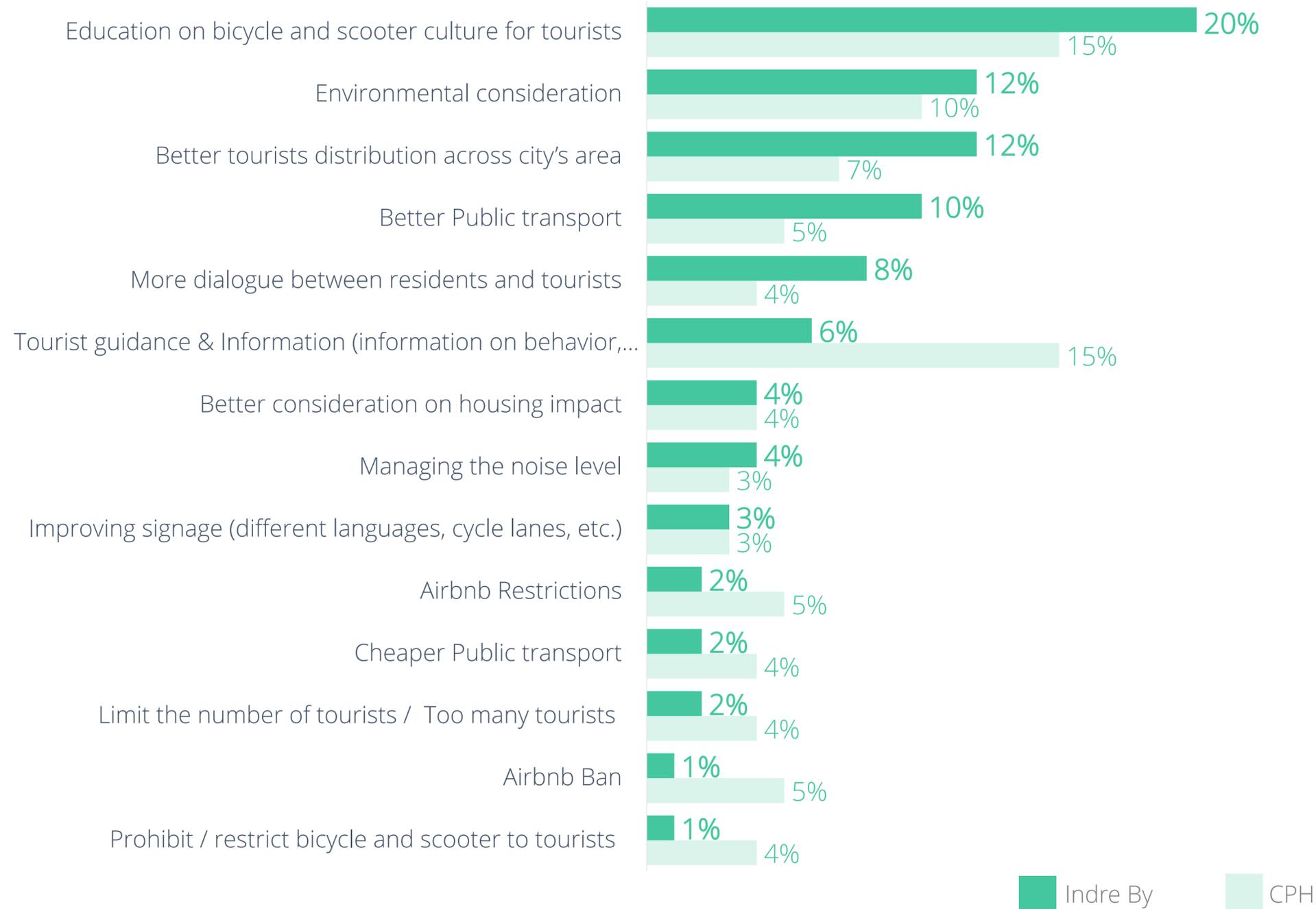


Base: Residents stating nuisances (N=542)

- Indre By
- Copenhagen

Residents expectations

Spontaneous mentions



Education & information on cycling, general behavior and environmental issues

- o Better information on cycling rules, general behavior and environmental consideration could improve the way Copenhagen tourists are perceived by local residents of Indre By.
- o They also wish for a better distribution of tourists across the city and better public transport.

Open end question - % of mentions that include the dimension

Take-Aways...



A positive sentiment overall, but an erosion mostly explained by potential fears on growth

- Overall, the sentiment towards tourism is **positive** and **in line or above** the European average...
- ... but it has **slightly declined** compared to 2018.
- Some perception around overtourism exists, but remains **localized to the city center**.
- In general, the question of **tourism growth** is **less consensual**.
- Indre By tends to show **some sign of tourism "fatigue"**, but not irreversible! A focus on heritage maintenance is expected.
- The Copenhageners are still **tourist friendly** and they are **still willing to promote** their city but **under clear conditions**:
 - Strong **communication on how to behave** (cycling and general behavior)
 - Better **distribution of tourists** "inside" and "outside" of Copenhagen and all over the year
 - **Respect of the environment**



Five reasons for working with us

(though we may find plenty of others!)

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

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