



# Survey on Japanese Tourists in Copenhagen

December 2002 - August 2003

# Survey on Japanese tourists in Copenhagen

## Introduction

The following report will present the main findings of a survey on Japanese visitors to Copenhagen. After summarizing the main findings, the report will describe the background and purpose of the survey, which is followed by a detailed description of the results.

**Section I.** contains comments on the profile of the Japanese respondents and their motivation to travel to Denmark. Further the section describes their general experience during their stay in Copenhagen and will finally introduce some ideas how the Japanese visitors perceive Copenhagen in comparison to other European cities.

**Section II.** presents some examples of a visitor segmentation analysis, first focusing on the Japanese business traveler segment and then on Japanese women visitors segment in the age between 25-44.

In the appendix the following items are attached: The results of the complete survey in table form, the questionnaires in its English form and as a supplement a brief summary of an focus group survey conducted by the Scandinavian Tourist Board in Japan.

## Main findings:

- For the vast majority of the respondents (86%) Copenhagen has fulfilled their expectations as travel destination.
- Copenhagen is perceived by 88% of the respondents, as a city with an exciting cultural heritage.
- Safety and security is regarded to be higher than in other European cities for the 82,5% of the Japanese respondents, and 77,5% agree/partially agree that the city is romantic and charming compared to other city destinations in Europe.
- In terms of service standards, 75,8% agree/partially agree that the hotels/restaurants in Copenhagen offer a high international service level.
- However, 33,6% do not find good shopping opportunities in Copenhagen and 32,1% disagreed with Copenhagen being more modern and trendy compared to other cities.
- 20% of the Japanese respondents totally disagree with the statement that Copenhagen offers a large variety of activities.
- While the majority (80%) of the respondents have previously visited Europe, only 30% of them have been in Copenhagen before.
- The Japanese visitor is staying on the average **2,18 days** in Copenhagen.

In short, the strongest aspects revealed in the survey are the perceptions of Copenhagen as a safe, secure, romantic and charming city, with high standards of service and an exciting cultural heritage. On the other hand, there is room for improvement in the variety of activities and shopping opportunities offered, as well as in the motivation to visit Copenhagen in the first place.

## Part I. Background for the survey

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The survey was carried out to provide Wonderful Copenhagen with updated material on Japanese tourists' view on Copenhagen, in order to estimate and evaluate the city's position from the point of view of the individual Japanese.

According to the Danish Tourist Board, Japanese tourists have an estimated daily expenditure twice as high as the average for the total number of tourists in Copenhagen. Thus, it is crucial for Copenhagen to maintain its leading position as the Scandinavian destination attracting the highest number of Japanese tourists. To keep this position is a difficult task for Copenhagen, since the number of Japanese tourists has dropped drastically in all European top destinations after the terrible events around the September 11<sup>th</sup>. Thus, for Copenhagen's tourist industry it is important to know more about the Japanese attitudes toward the city in order to improve its awareness and reputation on the Japanese travel market, which in turn may result in increasing arrival numbers.

### Facts about the survey:

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Interview location:	Copenhagen's International Airport (Boarding gate for flights Copenhagen - Tokyo)
Date:	December 2002 April 2003 August 2003
Total number of respondents:	514
Profile:	Japanese tourists departing Copenhagen.
Gender:	52,8% Female 47,2% Male
Age:	Evenly distributed

## 1.2 Profile of respondents

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In terms of social status, 49% of the respondents belong to the upper class and their professions are manager/executive (8,1%), white-collar worker (27,3%) or self-employed (13,6). The survey also revealed a significant number of full-time housewife / husbands (14%) among the tourists interviewed. The age and gender of the respondents is evenly distributed as shown in table no. 3 in the appendix.

A large number of the tourists interviewed (74,4%) were visiting Copenhagen for the first time, but 80% have been in Europe before. More than 86% of the Japanese tourists stay in 4-5 star Hotels during their stay in Copenhagen, with an average daily spending of 1200 DKK, excluding accommodation.

## 1.2 Travel patterns and motivation

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The majority of the Japanese respondents (68%) travelled with a full package tour (39,1%) or with a free-time package tour (16%). The majority (66,2%) were in a leisure trip, followed by a significant (31%) number on a business trip.

The preferred mean to buy the accommodation in Copenhagen is through a travel agent in Japan (55%), and the 7,7% booked directly on the Internet. The most used Internet sites are the airline's sites (30%), the travel agency sites (26,3%) and the Scandinavian tourist board site (21%).

The inspiration and motivation for coming to Copenhagen were primarily from traveling books (18,8%) and recommendations from family and friends (13,7%). In 7,2% of the cases, traveling agencies were the primary motivator for a visit in the city, while 5,7% had seen printed advertisement for Copenhagen. The greatest part (58%) of the Japanese visitors is staying in the upper class 4-5 star hotel categories.

For detailed results please refer to the tables 6-11 in the appendix at the end of the report.

10 .Where did you get inspired?		
	Total ticks	% from total
Previous visit	50	10,6%
Family/ friends	65	13,7%
Travel agency	34	7,2%
Travel books	89	18,8%
<b>TV reports</b>	7	1,5%
Internet	12	2,5%
Heard/ read of events	9	1,9%
TV ad.	1	0,2%
Printed ad	27	5,7%
Other	179	37,8%
<b>Base</b>	<b>473</b>	<b>100%</b>

### 1.3 Favorite activities of the Japanese tourists in Copenhagen

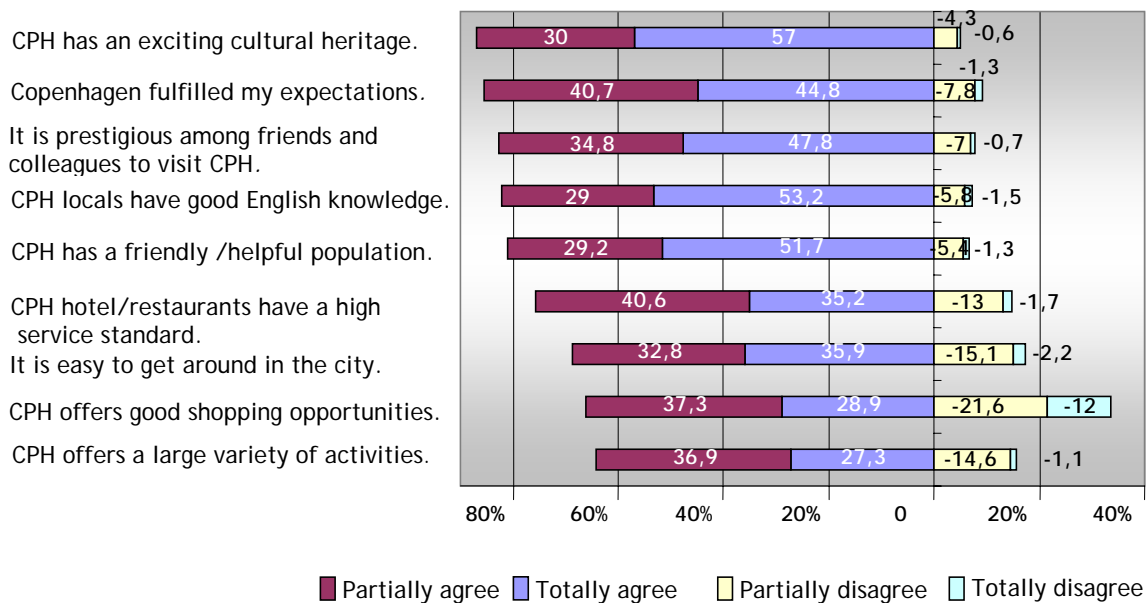
As in many other city destinations the favorite activities among Japanese tourists in Copenhagen is the visit of the town's major attractions, followed by guided sightseeing tours and going on shopping sprees. The table below is presenting a detailed ranking of the Japanese activities on their visit in Copenhagen.

12 Which activities have you done in CPH?		
	Total ticks	% from total
Visit attractions/sights	330	22,4%
visit museums	196	13,3%
Go to the theatre	16	1,1%
Go to concerts/festivals	34	2,3%
<b>Walk around in town</b>	256	17,4%
organised sightseeing tour	88	6,0%
Excursion. outside city	94	6,4%
Go out by night	31	2,1%
<b>Shopping</b>	204	13,9%
Dine in restaurants	110	7,5%
Attend sport event	9	0,6%
Participate in sport event	4	0,3%
Congress	27	1,8%
Business meetings	35	2,4%
Other	38	2,6%

### 1.4 The Japanese experience in Copenhagen

Luckily for the actors in the Copenhagen tourist industry the vast majority of the Japanese respondents (86%) agreed that their visit has fulfilled all their expectations and highly value the city as a tourist product.

#### Experiences in Copenhagen



An interesting point is that up 83% of the respondents declared that it is well reputed among friends and colleagues to visit Copenhagen. They also (80%) do appreciate that the locals are friendly and helpful with high English proficiency. Up to 87% are also impressed by the exciting cultural heritage of Copenhagen.

Even though 50% is positively disposed to all other possibilities that Copenhagen offers, yet respondents are not completely satisfied with shopping opportunities, the range of activities and the possibilities of transportation and to certain degree with the level of service in restaurants and hotels.

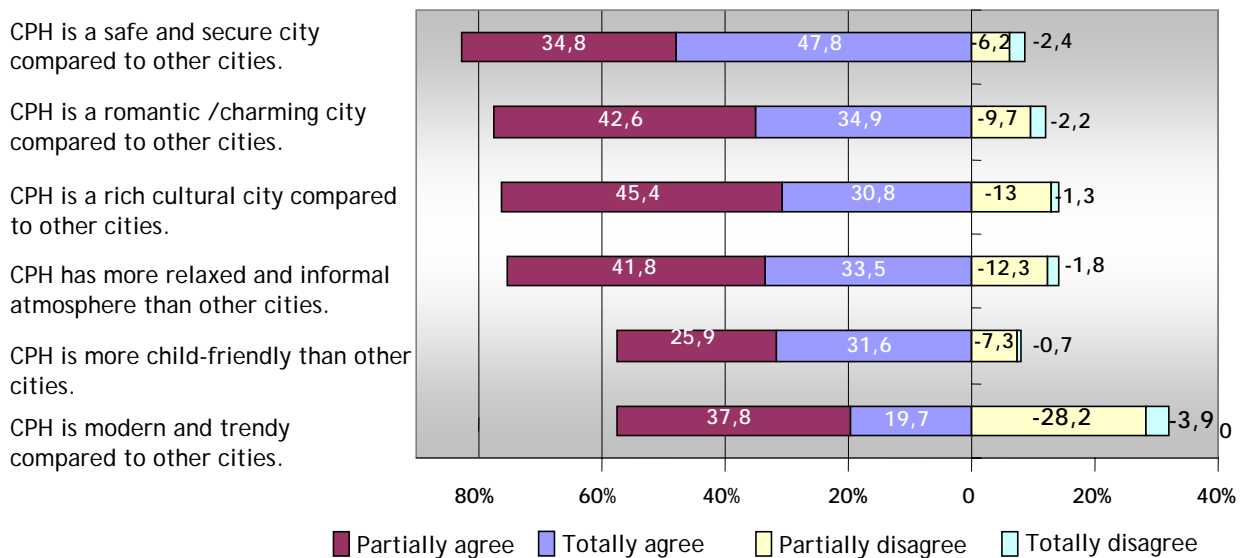
### 1.5 The Japanese perception of Copenhagen comparison to other European city destinations

Copenhagen scores high points on "safety compared to other cities", which correspond perfectly with the fact that more than half of the respondents think that Copenhagen is more child-friendly than other cities.

By far the greatest part find that compared to other cities, Copenhagen is more relaxed and informal, romantic and charming.

The branding question as to whether Copenhagen is modern and trendy has the lowest score compared to the rest of the questions, which is not surprising in the light the Japanese visitors are coming from one of the world technologically most advanced nations.

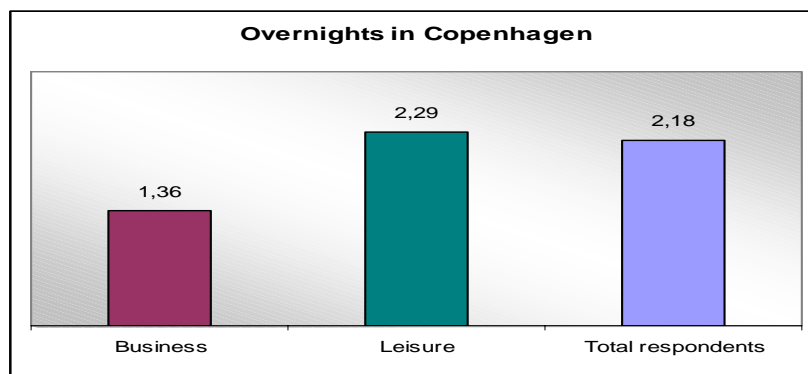
Branding Values



## Part II. Visitor Segment Analysis

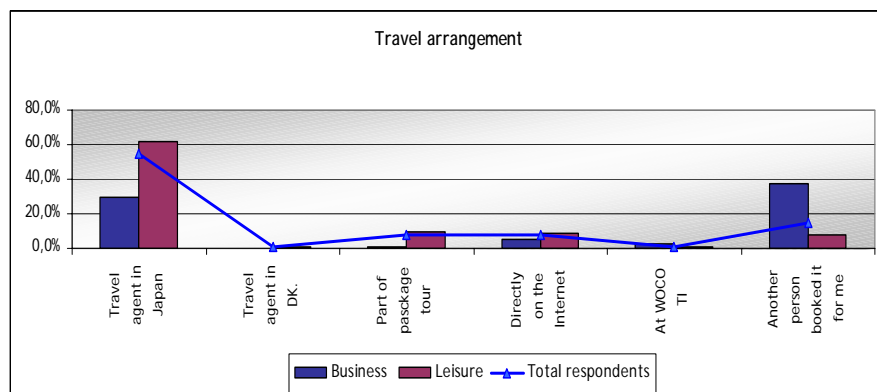
### . Business Travelers

- The segment of Japanese business travelers accounts for 24% of all interviewed visitors.
- The largest part of business traveler is in the age ranging from 35-44 (32%.
- The Japanese business traveler stays on the average **1,36 days** in Copenhagen, which is considerable less than the surveys average of 2,18 days.
- The average daily spending of the business traveler is with 1.050 DKK (exclusive accommodation) a fraction lower than the average spending of all respondents. The considerable lower shorter average time the Japanese business traveler stay in the city may give some explanations for the lower average spending of this segment. (See figure below) Hence, the business travelers seem not to have as much time at their disposal to spend their money on shopping tours as their landsmen during vacations.
- The Japanese business travelers mostly stay in the center of Copenhagen (58%) and a quarter of them spend only one day for the trip



### 2.1 Travel and booking patterns of the business travelers

While more than 70% of business travelers have been in Europe before, only 48% have visited Copenhagen. They seem combine their trip to Copenhagen with Scandinavian (37,1%) and 1 out of 4 flies directly from Japan.



Travel agents in Japan (30%) not in Denmark (0%) are usually the ones who arrange the accommodation for them and only small percentage (5,5%) use Internet to book for their places to stay and very few of them ask for the support from WOCO TI (2,2%). Meanwhile, all these numbers for leisure group are higher, at least 1% of leisure group use travel agents in Denmark and 8,7% of them use internet for booking.

## 2.2 The Japanese business travelers experience in Copenhagen

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In general, the Japanese business travelers do have good experiences in Copenhagen as every evaluation statement gains more than 60% of their positive answers (totally agree or agree). They mostly appreciate Copenhagen as a city of exciting cultural heritage (82%) and highly evaluate the English knowledge of Copenhagen locals (91%). Up to 81% of them agree that Copenhagen has fulfilled their expectation as a city travel destination. However, the statement that Copenhagen provides a variety of activities gets the lowest percentage of positive answers but still account for 60%. A quarter of them do not find Copenhagen easy to get around.

Besides from their normal activities such as business meetings, congress (8%), visiting attractions/sights (16%) and simply walking around the town (15%) are the most common thing they do when they are Copenhagen. However, shopping, dining in restaurants and visit museums are also preferred by more than 10% which is rather high compared with other activities (the average is 6,7%. Theatres seem not to attract them at all (only 1,3%).

## 2.3 The business travelers' perception of Copenhagen comparison to other European city destinations

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The majority of business group which accounts for 74% have a good image about Copenhagen as a *romantic/charming city*, safe and secure city to stay compared with other cities.

None of them dissatisfy with service level in hotel/restaurant, still 16% do not completely satisfy. Having the same opinion with all others, business group (40%) also disagree that Copenhagen is a modern and trendy city compared with other cities.

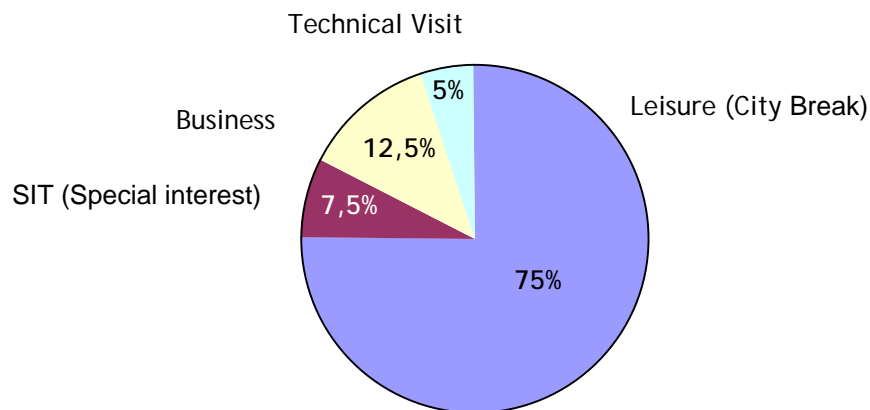
6 CPH is a safe and secure city to stay in when compared to other cities	
	% of totals
Totally agree	47,8%
Partly agree	34,8%
Partly disagree	6,2%
Totally disagree	2,4%

## Japanese female visitors segment (age from 25-44)

As the women are considered the decision-makers concerning journeys rather than their male counterparts interesting enough to take a close look at the results from the female group in the age from 25 -44. Japanese women in this age interval represent in the same time the trend setting force within the Japanese society

- The results of this survey are based on 86 surveys which is roughly 20% of the surveys volume
- Most of women tourists (75%) come to CPH for **leisure purpose** rather than business or technical visit and combine their trip with Scandinavian tour (up to 67%)
- They are mostly **office women** (white collar worker 36%) and surprisingly that even though they are Japanese women, 20,2% of them **travel alone** which account the most percentage.
- Only 14.5 percentage of them travel with husband, yet family and friends are the ones they travel with (19%) and they are also the one who inspired them for the trip (15,4%)
- They most likely either Free Individual Travelers 38% or choose the full package tour (32%) and ask the Japanese travel agency to arrange the accommodation one or three months (48%) before hand.
- They also prefer to stay in 4 or 5 star hotel (37%) and 2 or 3 star hotel (26%) mostly located in center of Copenhagen (36%) with the average overnights is 2,27.

### Type of Journey (Women age: 25-44)



## 2.4 The Japanese female visitors experience in Copenhagen

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Walking around the city and shopping are the most popular activities they do being in CPH (15,7%). Many of them prefer to go visiting attractions and sights (19,7%) and museum (11,7%). Compared to other groups, they seem to be interested in excursion outside the city and also having good dinners in the restaurants.

A high percentage of women (87%) do very much appreciate the friendliness and helpfulness from the locals and their exciting cultural heritage in CPH. When it comes to shopping, 25% of them do not think that it is good to shop in CPH and they are not completely satisfy with variety of activities of Copenhagen 23% partially disagree

12 Which activities have you done in CPH?		
	Total ticks	% from total
Visit attractions/sights	54	19,7%
<b>Walk around in town</b>	43	15,7%
Shopping	43	15,7%
visit museums	32	11,7%
Excursion. outside city	23	8,4%
Dine in restaurants	22	8,0%
organised sightseeing tour	17	6,2%
Go out by night	11	4,0%
Go to concerts/festivals	8	2,9%
Go to the theatre	5	1,8%
Congress	5	1,8%
Other	5	1,8%
Business meetings	4	1,5%
Attend sport event	1	0,4%
Participate in sport event	1	0,4%
Base	274	100%

## 2.5 The female visitors perception of Copenhagen comparison to other European city destinations

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They are all impressed by the safety and security of the city when up 90% of them agree on this and also they feel more relaxed and informal atmosphere compared with other cities they have been to. 31%, which is a high percentage, disagree that CPH is modern and trendy and 16% of them do not completely agree with the statement that CPH is a rich cultural city.

# Appendix 1. All Results of the Questionnaire

Total number of Respondents 514

4. Profession		
	Total ticks	% from total
White collar worker	135	27,3%
Housewife/ husband (full time)	72	14,6%
Self employed, freelance /civil servant	67	13,6%
Currently without work	59	11,9%
Student, pupil	44	8,9%
Manager/ executive	42	8,5%
Pensioner	40	8,1%
Part time	18	3,6%
Base	17	3,4%
Base	494	100%

3. Age		
	Total ticks	% from totals
55-64	108	21,6%
45-54	94	18,8%
25 -34	85	17,0%
35 -44	81	16,2%
Over 65	81	16,2%
Under 25	50	10,0%
Base	499	100%

5a. Type of Journey		
	Total ticks	% of totals
Leisure (City Break)	325	66,2%
Business /MICE	100	20,4%
Technical Visit	34	6,9%
SP (Special interest)	18	3,7%
Cruise	14	2,9%
Base	985	100%

5b. Travel arrangement		
	Total ticks	% of totals
Full package tour	189	39,1%
Free time package tour	78	16,1%
Individual travel	140	29,0%
Not via travel agent	23	4,8%
Business	53	11,0%
Base	483	100%

6. Who are you traveling with?		
	Total ticks	% of totals
Alone	84	15,9%
With husband/wife	144	27,3%
With family/relatives	65	12,3%
With friends	70	13,3%
With colleagues	53	10,0%
In a small group less than 10 people	18	3,4%
In a small group 10-15 people	32	6,1%
In a larger group 15-30 people	62	11,7%
Base	528	100%

8a. Itinerary		
	Total ticks	% of totals
Scandinavia	307	66,6%
Baltic countries	18	3,9%
Central Europe	70	15,2%
UK	15	3,3%
Southern Europe	5	1,1%
Directly from Japan	46	10,0%
Base	461	100%

9. When did you book?		
	Total ticks	% of totals
1 month before	187	38,1%
1-3 months before	230	46,8%
3-6 months before	47	9,6%
Over 6 months before	27	5,5%
Base	1019	100%

11. How did you buy accommodation in CPH?		
	Total ticks	% of totals
Travel agent in Japan	243	55,0%
Travel agent in DK.	3	0,7%
Part of package tour	33	7,5%
Directly on the Internet	34	7,7%
At WOCO TI	5	1,1%
Another person booked it for me	64	14,5%
I don't know	60	13,6%
Base	442	100%

10. Where did you get inspired?		
	Total ticks	% from total
Previous visit	50	10,6%
Family/ friends	65	13,7%
Travel agency	34	7,2%
Travel books	89	18,8%
TV reports	7	1,5%
Internet	12	2,5%
Heard/ read of events	9	1,9%
TV ad.	1	0,2%
Printed ad	27	5,7%
Other	179	37,8%
Base	473	100%

10b. Which Internet websites did you use?		
	Total ticks	% of totals
Airline sites	69	30,8%
Travel agency site	59	26,3%
Scandinavian tourist board site	47	21,0%
Danish tourist board site	16	7,1%
Woco site	12	5,4%
Hotel site	18	8,0%
An association site	3	1,3%
Base	224	100%

12 Which activities have you done in CPH?		
	Total ticks	% from total
Visit attractions/sights	330	22,4%
Walk around in town	256	17,4%
Shopping	204	13,9%
visit museums	196	13,3%
Dine in restaurants	110	7,5%
Excursion. outside city	94	6,4%
organised sightseeing tour	88	6,0%
Other	38	2,6%
Business meetings	35	2,4%
Go to concerts/festivals	34	2,3%
Go out by night	31	2,1%
Congress	27	1,8%
Go to the theatre	16	1,1%
Attend sport event	9	0,6%
Participate in sport event	4	0,3%
Base	1472	100%

13 Daily Expenses in CPH?		
	Total ticks	% of totals
under 600 kr.	156	39,5%
600 - 1200 kr.	132	33,4%
1200 - 2400 kr	68	17,2%
above 2400 kr.	39	9,9%
Base	395	100%

14 How many times in CPH?		
	Total ticks	% of totals
first time	357	74,4%
once	48	10,0%
twice	34	7,1%
serveral times	41	8,5%
Base	480	100%

16 Accomodation type		
	Total ticks	% from total
Hotel 4 - 5 stars	265	58,1%
Hotel 2 -3 stars	130	28,5%
Bed & breakfast type	15	3,3%
Cruise Ship	5	1,1%
Holiday centre	0	0,0%
Summer cottage	1	0,2%
Camping	2	0,4%
Family and friends	9	2,0%
Don't stay overnight	29	6,4%
Base	456	100%

15 How many times in Europe before?		
	Total ticks	% of totals
first time	102	20,9%
once	50	10,3%
twice	57	11,7%
three times	62	12,7%
over three times	216	44,4%
Base	385	100%

17 Where in Copenhagen do you stay?		
	Total ticks	% of totals
Copenhagen centre	215	65,0%
Greater Copenhagen	15	4,5%
Rest of Denamrk	11	3,3%
Sweden	24	7,3%
1 day visitor	66	19,9%
Base	331	100%

## Part II. Your Experience in the City

1 Exciting cultural heritage in CPH?		
	Total ticks	% of totals
Totally agree	266	57,0%
Partly agree	144	30,8%
Partly disagree	20	4,3%
Totally disagree	3	0,6%
I do not know	34	7,3%
Base	467	100%

2 CPH offers a large variety of acitivities?		
	Total ticks	% of totals
Totally agree	125	27,3%
Partly agree	169	36,9%
Partly disagree	67	14,6%
Totally disagree	5	1,1%
I do not know	92	20,1%
Base	458	100%

3 Cph offers good shopping oportunities?		
	Total ticks	% of totals
Totally agree	134	28,9%
Partly agree	173	37,3%
Partly disagree	100	21,6%
Totally disagree	12	2,6%
I do not know	45	9,7%
Base	464	100%

4 CPH has a friendly /helpful population		
	Total ticks	% of totals
Totally agree	241	51,7%
Partly agree	136	29,2%
Partly disagree	25	5,4%
Totally disagree	6	1,3%
I do not know	58	12,4%
Base	466	100%

7 It is Prestigious among your friends and colleagues to visit CPK		
	Total ticks	% of totals
Totally agree	220	47,8%
Partly agree	160	34,8%
Partly disagree	32	7,0%
Totally disagree	3	0,7%
I do not know	45	9,8%
Base	460	100%

8 It is eaasy to get around in the city		
	Total ticks	% of totals
Totally agree	166	35,9%
Partly agree	152	32,8%
Partly disagree	70	15,1%
Totally disagree	10	2,2%
I do not know	65	14,0%
Base	463	100%

9 All in all CPH as an city travel destination fulfilled my expectations		
	Total ticks	% of totals
Totally agree	207	44,8%
Partly agree	188	40,7%
Partly disagree	36	7,8%
Totally disagree	6	1,3%
I do not know	25	5,4%
Base	462	100%

**Part III. Branding Values**

1 CPH has a more relaxed and informal athmosph. than other cites		
	Total ticks	% of totals
Totally agree	153	33,5%
Partly agree	191	41,8%
Partly disagree	56	12,3%
Totally disagree	8	1,8%
I do not know	49	10,7%
Base	457	100%

2 CPH has is modern and trendy compared to other cites		
	Total ticks	% of totals
Totally agree	90	19,7%
Partly agree	173	37,8%
Partly disagree	129	28,2%
Totally disagree	18	3,9%
I do not know	48	10,5%
Base	458	100%

3 CPH is more child friendly than other cites		
	Total ticks	% of totals
Totally agree	144	31,6%
Partly agree	118	25,9%
Partly disagree	33	7,3%
Totally disagree	3	0,7%
I do not know	157	34,5%
Base	455	100%

4 CPH is a romantic/charming city when compared to other cites		
	Total ticks	% of totals
Totally agree	159	34,9%
Partly agree	194	42,6%
Partly disagree	44	9,7%
Totally disagree	10	2,2%
I do not know	48	10,5%
Base	455	100%

5 CPH is a rich cultural city when compared to other cites		
	Total ticks	% of totals
Totally agree	140	30,8%
Partly agree	206	45,4%
Partly disagree	59	13,0%
Totally disagree	6	1,3%
I do not know	43	9,5%
Base	454	100%

6 CPH is a safe and secure city to stay in when compared to other cites		
	Total ticks	% of totals
Totally agree	217	47,8%
Partly agree	158	34,8%
Partly disagree	28	6,2%
Totally disagree	11	2,4%
I do not know	40	8,8%
Base	454	100%

## Appendix 2. The Questionnaire

Survey of Japanese Tourists on their visit in Copenhagen 2002/3

A	<u>Interviewer</u>	Name: _____ Age: _____ Nationality: _____
B	Interview Locality	<input type="checkbox"/> Airport <input type="checkbox"/> Hotel <input type="checkbox"/> City Tour <input type="checkbox"/> Other _____
C	Upon arrival/ departure	<input type="checkbox"/> Day of Arrival <input type="checkbox"/> During the visit <input type="checkbox"/> Day of departure
D	Date and time	Date: _____ Time: _____
E	Weather conditions:	<input type="checkbox"/> Sunny <input type="checkbox"/> Partly overcast <input type="checkbox"/> Overcast <input type="checkbox"/> Rainy <input type="checkbox"/> Windy <input type="checkbox"/> Hot <input type="checkbox"/> Cold
<p><b>Intro</b> Hello - I am representing the Copenhagen Tourist Board. May I please ask you a couple of questions about your visit in the city of Copenhagen? It will take about 8-10 minutes. If you take part, we like to offer you a ticket for the state-controlled Lottery, or a Copenhagen City card valid for one day.</p>		
<p><b>I.</b> First I would like to ask who you are and why you are in Copenhagen</p>		
1	Where do you live??	Notes: _____
2	Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female
3	Age	<input type="checkbox"/> Under 25 <input type="checkbox"/> 25 - 35 <input type="checkbox"/> 35 - 45 <input type="checkbox"/> 45 - 55 <input type="checkbox"/> 55 - 65 <input type="checkbox"/> 65 +
4	Profession	<input type="checkbox"/> Self employed, freelance <input type="checkbox"/> Manager/ executive <input type="checkbox"/> White collar worker/civil servant <input type="checkbox"/> Skilled worker / also trainee <input type="checkbox"/> Pensioner <input type="checkbox"/> Housewife/ husband (full time) <input type="checkbox"/> Student, pupil <input type="checkbox"/> Currently without work
5a.	Type of journey	<input type="checkbox"/> Cruise <input type="checkbox"/> Leisure (City Break) <input type="checkbox"/> SIT (Special interest) <input type="checkbox"/> Business (Corporate / Incentive / exhibition/Meeting/conference) <input type="checkbox"/> Technical Visit
5b.	Travel arrangement	<input type="checkbox"/> Full package tour <input type="checkbox"/> (The package tour include everything also planned activities) <input type="checkbox"/> Free-time package tour <input type="checkbox"/> (The package tour include only

		airplane & hotel, activities can be decided by one self) <ul style="list-style-type: none"> <li><input type="checkbox"/> Individual travel</li> <li><input type="checkbox"/> (Only airplane ticket is booked through travel agency, travel company)</li> <li><input type="checkbox"/> Nothing is booked through a travel agency</li> <li><input type="checkbox"/> Business</li> <li><input type="checkbox"/> Don't know</li> </ul>
5c.	How many overnights in Copenhagen?	0 1 2 3 4 <input type="checkbox"/> If more please state number of nights _____
6	Who are you travelling with if not on your own?  [NB: <u>Multiple answers possible</u> ]	<ul style="list-style-type: none"> <li><input type="checkbox"/> Alone</li> <li><input type="checkbox"/> With husband/wife</li> <li><input type="checkbox"/> With family/relatives</li> <li><input type="checkbox"/> No. of accompanying children Notes: _____</li> <li><input type="checkbox"/> With friends</li> <li><input type="checkbox"/> With colleagues</li> <li><input type="checkbox"/> In a small group less than 10 people</li> <li><input type="checkbox"/> In a small group 10-15 people</li> <li><input type="checkbox"/> In a larger group 15-30 people</li> </ul>
7	Travel itinerary	<ul style="list-style-type: none"> <li><input type="checkbox"/> Directly from Japan</li> <li><input type="checkbox"/> Via _____</li> </ul>
8	Travel combination with other city destinations ... to .. from	<ul style="list-style-type: none"> <li><input type="checkbox"/> Oslo; Bergen, Stockholm, Helsinki</li> <li><input type="checkbox"/> Baltic countries (RUS;LIT;POL)</li> <li><input type="checkbox"/> From central Europe/D,F,AUT,CH, UK</li> <li><input type="checkbox"/> From Southern Europe (E;IT,POR; GRE)</li> </ul> Other: _____
9	When did you, or another person book your journey - before?	<ul style="list-style-type: none"> <li><input type="checkbox"/> 1 month before</li> <li><input type="checkbox"/> 1- 3 months before</li> <li><input type="checkbox"/> over 6 months before</li> </ul>
10	Where did you get inspired to visit Copenhagen?	<ul style="list-style-type: none"> <li><input type="checkbox"/> Previous Visit</li> <li><input type="checkbox"/> Family/friends/colleagues</li> <li><input type="checkbox"/> Offer from travel agency/ advertisement <i>Which one:</i> _____</li> <li><input type="checkbox"/> Travel books /magazines</li> <li><input type="checkbox"/> TV-programmes</li> <li><input type="checkbox"/> Internet</li> <li><input type="checkbox"/> Head / read about events</li> <li><input type="checkbox"/> Advertisement in TV</li> <li><input type="checkbox"/> Advertisement newspaper/magazine</li> <li><input type="checkbox"/> Other _____</li> <li><input type="checkbox"/> I don't know/cannot answer</li> </ul>
10 b	In the event you have used the Internet, which kind of websites did you use	<ul style="list-style-type: none"> <li><input type="checkbox"/> Airline websites</li> <li><input type="checkbox"/> Agency /Tour operator websites</li> <li><input type="checkbox"/> Danish Tourist Board websites</li> <li><input type="checkbox"/> Copenhagen Tourist Board website</li> </ul>

		<input type="checkbox"/> Hotel website <input type="checkbox"/> Clubs/ associations website
11	How did you buy your accommodation in Copenhagen?	<input type="checkbox"/> With travel agency in Japan <input type="checkbox"/> With travel agency in Denmark <input type="checkbox"/> It is part of an organised package tour <input type="checkbox"/> Bought it directly through the Internet <input type="checkbox"/> At the Copenhagen Tourist Board <input type="checkbox"/> Another person booked the journey <input type="checkbox"/> Other/cannot answer
12	Which of the following things have you done or would you like to do during your visit to Copenhagen?  [NB: <u>Multiple answers possible</u> ]	<input type="checkbox"/> Visit attractions/sights <input type="checkbox"/> Visit museums/exhibitions <input type="checkbox"/> Go to the theatre <input type="checkbox"/> Go to concerts/festivals <input type="checkbox"/> Walk around town <input type="checkbox"/> Take part in an organised sightseeing tour <input type="checkbox"/> Make an excursion outside the city <input type="checkbox"/> Go out at night/ nightlife <input type="checkbox"/> Shopping <input type="checkbox"/> Dine at restaurants <input type="checkbox"/> Watch sport events <input type="checkbox"/> Do sports yourself <input type="checkbox"/> Conference/congress <input type="checkbox"/> Business meeting/assignment <input type="checkbox"/> Other things
13	How much money do you think that you will spend during your stay in Copenhagen per day? You shall include all expenses covering food & beverage, local transport, shopping and sightseeing.  [NB: <u>average daily expenses per person exclusively hotel and airfares</u> ]	<input type="checkbox"/> 0 - 10.000 JPY <input type="checkbox"/> 10.000 - 20.000 JPY <input type="checkbox"/> 20.000 - 40.000 JPY <input type="checkbox"/> more than 40.000 JPY <input type="checkbox"/> Don't know  <u>Equivalent in DKK:</u> <input type="checkbox"/> 0 - 600 DKK <input type="checkbox"/> 600 - 1200 DKK <input type="checkbox"/> 1200 - 2.400 DKK <input type="checkbox"/> More than 2.400 DKK <input type="checkbox"/> Don't know
14	How many times have you visited Copenhagen before?	<input type="checkbox"/> Never before <input type="checkbox"/> Once <input type="checkbox"/> Twice <input type="checkbox"/> Several times
15	How many times have you visited Europe before?	<input type="checkbox"/> Never before <input type="checkbox"/> Once <input type="checkbox"/> Twice <input type="checkbox"/> Three times <input type="checkbox"/> Several times
16	What kind of accommodation have you chosen during your visit to Copenhagen?  [NB: <u>Multiple answers possible</u> ]	<input type="checkbox"/> Hotel 4 - 5 stars <input type="checkbox"/> Hotel 2 - 3 stars <input type="checkbox"/> Bed and breakfast/ Youth hostel <input type="checkbox"/> Cruise ship <input type="checkbox"/> Holiday centre <input type="checkbox"/> Summer cottage <input type="checkbox"/> Camping <input type="checkbox"/> Family and friends <input type="checkbox"/> No accommodations (1 day visit)
17	Where are you staying - in the city or in the suburbs?	<input type="checkbox"/> Copenhagen <input type="checkbox"/> Greater Copenhagen <input type="checkbox"/> Rest of Denmark <input type="checkbox"/> Sweden

	<input type="checkbox"/> No accommodation (1 day visit)
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<p>II. Now I would like to ask some questions about your experience in the the city. If you have just arrived today, please tell us about your beforehand opinion. Please answer the following short statements whether you totally agree, partly agree, don't agree or disagree, partly disagree or totally disagree.</p>		
1	The cultural heritage is exiting in Copenhagen and surroundings.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
2	Copenhagen and surroundings offer a large variety of activities and opportunities for international visitors.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
3	Copenhagen offers interesting shopping opportunities.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
4	The local population is friendly and helpful	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
5	The local population has fairly good knowledge of English	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
6	The service level in Copenhagen's hotels, restaurants and attractions is at a <u>high</u> international standard.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
7	It is prestigious (status) among your friends and colleagues to visit Copenhagen.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
8	It is easy to get around in the city (Street names, public transport etc)	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly agree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
8	All in all Copenhagen as an city travel /holiday destination fulfilled my expectations:	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer

III.	<b>Branding values:</b> Now I would like to ask a few questions about your impression of Copenhagen. If you have just arrived today, please tell us about your beforehand perception. As you did with the previous questions please answer the statements whether you totally agree, partly agree, don't agree or disagree, partly disagree or totally disagree	
1	Compared to other big cities in Europe you find a more informal and relaxed atmosphere in Copenhagen.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
2	Copenhagen is a trendy and modern city compared to other big cities in Europe.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
3	Copenhagen is a child-friendly city compared to other big cities in Europe.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
4	Copenhagen is a romantic/charming city compared to other big cities in Europe.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
5	Copenhagen is a rich cultural city compared to other big cities in Europe.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
6	Copenhagen is a safe and secure city to stay in compared to other big cities in Europe.	<input type="checkbox"/> Totally agree <input type="checkbox"/> Partly agree <input type="checkbox"/> Don't agree or disagree <input type="checkbox"/> Partly disagree <input type="checkbox"/> Totally disagree <input type="checkbox"/> Don't know/can't answer
7	To conclude the interview I would like you to mention 3 English words which describe the city of Copenhagen  (if possible adjectives .. like charming, ugly , HC Andersen, Tivoli etc.)	Notes: [also fewer words possible] 1. _____ 2. _____ 3. _____ _____

## Appendix 3. Analysis of City Break Focus Groups

July and August 2003 by the Scandinavian Tourist Board

### Results of questionnaire:

- All three age groups (25-35 yrs OLs, 40 - 50 yrs old women and over 50 years old men and women) stated that they were somewhat interested or very interested in going to Scandinavia on the City Break tour.
- There are no trends seen in the number of times people have traveled and their answers thus this will not be analyzed upon.
- Most indicated that they were interested in visiting both cities on one tour, however, some (20%) stated that they preferred only visiting Copenhagen.
- Among the 25-35 yrs and 40 - 50 yrs about half thought 3 days in Copenhagen was perfect, while the other half would like to spend more days in Copenhagen. The over 50 yrs thought 3 days was perfect.
- All the age groups agreed to that 4 days in Stockholm was perfect. A few would like to spend more days in Stockholm.
- Most stated that they found the shown Copenhagen itinerary somewhat interesting. Among the 25-35 yrs 40% found the itinerary very interesting. However, they aged groups did not agree to the most interesting activities. Among the 25 - 35 yrs and the 40 - 50 yrs Dining with the Danes was the most interesting activity, whereas the over 50 yrs old thought castles was the most interesting.
- Most stated that they found the shown Stockholm itinerary somewhat interesting. Among the 25-35 yrs 35% found the itinerary very interesting. All three age groups found the Ice Bar and some found Sodermalm to be interesting. The 40-50 yrs found Djurgaarden to be an interesting activity, whereas some among the OLs found it to be not very interesting.
- The 40-50 yrs and the over 50 yrs where to some extent willing and able to pay more money for the trip than the OLs.

### Office Ladies results (based on comments and questionnaire):

- Few days on a mono destination tour (mono city) was found to be interesting, as this segment does not have much holiday.
- Shopping and seeing something unique or new is very important.
- Scandinavian design seen as something interesting among the OLs segment, however should be mixed with other activities.
- Dine with the Danes is seen as a very interesting and unique activity, as it is not offered in many other countries.

### 40-50 yrs results (based on comments and questionnaire):

- The theme 'design' is not so appealing to this segment, as they want to travel with their children.
- Would like to stay in one place together with their children.
- Are more interested in seeing the parks and other green places in the cities.

### Over 50 yrs results (based on comments and questionnaire):

- Want to see something they have heard of or know. This segment is not that interested in seeing new things or places.

- Are more interested in seeing historical attractions and places and traditional Scandinavian design not so much modern Scandinavian design.

**Recommended target segment and tour:**

- Office Ladies traveling FIT or traveling by a free time package tours depending on what is cheapest.
- Include optional tours to the design specific places with etc. one guide, who knows about design.
- Include one evening with Dine with the Danes.
- Advertise a suggested itinerary and a guidebook about how to get to the more unique places in Stockholm and Copenhagen.
- Include both design and other attractions. This way a broader segment will be targeted, than if the trip only concerned design.

**Results of questionnaires:**

	Age groups		
	25 - 35 (20)	40 - 50 (6)	50 + (8)
<b>Would you be interested in going to SK on this kind of tour?</b>			
Very interested:	8 (40%)	3 (50%)	3 (38%)
Somewhat interested:	11 (55%)	2 (33%)	5 (62%)
Somewhat not interested:	1 (5%)	1 (17%)	0
<b>Would you like to go to:</b>			
Both cities on one tour:	14 (70%)	3 (50%)	6 (75%)
Copenhagen only:	4 (20%)	1 (17%)	2 (25%)
Stockholm only:	1 (5%)	1 (17%)	0
<b>Copenhagen 3 days/4 nights:</b>			
Too few:	9 (45%)	3 (50%)	1 (12%)
Perfect:	11 (55%)	2 (33%)	7 (88%)
<b>Copenhagen itinerary:</b>			
Very interesting:	8 (40%)	1 (17%)	1 (12%)
Somewhat interesting:	10 (50%)	5 (83%)	7 (88%)
Somewhat not interesting:	1 (5%)	0	0
<b>Most interesting activity in Copenhagen:</b>			
Dine with the Danes:	11 (55%)	4 (67%)	1 (13%)
Design:	5 (25%)	1 (17%)	3 (38%)
Louisiana:	4 (20%)	1 (17%)	1 (13%)
North Sealand:	4 (20%)	1 (17%)	0
Black Diamond:	3 (15%)	0	0
Castles:	3 (15%)	1 (17%)	4 (50%)
Walking through the city	0	0	1 (13%)
<b>Stockholm day 4 days/5 nights:</b>			
Too few:	3 (15%)	1 (17%)	1 (13%)
Perfect:	14 (70%)	4 (67%)	7 (87%)
Too many:	3 (15%)	0	0
<b>Stockholm itinerary:</b>			
Very interesting:	7 (35%)	1 (17%)	0
Somewhat interesting:	10 (50%)	4 (67%)	7 (87%)

Somewhat not interesting:	2 (10%)	0	1 (13%)
<b>Most interesting activity in Stockholm (Multiple answers):</b>			
Ice bar:	9 (45%)	2 (33%)	2 (25%)
Sodermalm:	6 (30%)	2 (33%)	2 (25%)
Nordiska Krystall:	4 (20%)	0	1 (13%)
Subway:	2 (10%)	0	0
Design shops:	2 (10%)	0	3 (38%)
Ostermalm:	2 (10%)	0	0
Gamla Stand:	1 (5%)	0	0
National Museum:	1 (5%)	0	1 (13%)
Skansen:	1 (5%)	0	0
Vasa Museum:	1 (5%)	0	0
Djurgården	0	2 (33%)	0
<b>Least interesting activity in Stockholm:</b>			
Vasa Museum:	4 (20%)	0	0
Djurgården:	3 (15%)	0	0
<b>Price willing to pay including Stockholm and Copenhagen 7 days/9 nights:</b>			
<b>Off-season (Oct ~ Apr):</b>			
JPY 110,000 - 140,000	6 (30%)	0	3 (37%)
JPY 150,000 - 200,000	10 (50%)	3 (50%)	2 (25%)
JPY 210,000 - 240,000	3 (15%)	2 (33%)	0
JPY 250,000 - 300,000	0	1 (17%)	1 (13%)
No Off-season	0	0	2 (25%)
<b>Price willing to pay including Stockholm and Copenhagen 7 days/9 nights:</b>			
<b>Peak season (May ~ Sept):</b>			
JPY 210,000 ~ 300,000	15 (75%)	3 (50%)	3 (37%)
JPY 310,000 ~ 400,000	4 (20%)	2 (33%)	1 (13%)
JPY 410,000 ~ 500,000	0	1 (17%)	1 (13%)
JPY 510,000 ~ 600,000	0	0	0
No peak season	1 (5%)	0	3 (37%)

## About the survey

**Data Source:** Wonderful Copenhagen, Analysis and Communication Department

**Contact:** Claus Sager  
 Analysis and Market Intelligence  
 Wonderful Copenhagen  
 e-mail: [cls@woco.dk](mailto:cls@woco.dk)  
 Direct phone: + 45 33557407