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MEISLER-17

Copenhagen Jazz Festival

A 2017 participant survey



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Introduction

The Copenhagen Jazz Festival is a yearly event lasting for 10 days. The focus of the festival is to host a large number of concerts in the city of Copenhagen which are centered around Jazz music and similar genres of music.

The festival has, in its current form, existed since 1979 and thus has been a part of cultural life in Copenhagen for more than 3 decades. This year's Copenhagen Jazz Festival hosted more than 1,300 concerts at more than 120 venues in various locations throughout Copenhagen. The estimated number of participants was 250,000+, making the Copenhagen Jazz Festival one of Europe's largest jazz festivals.

Survey objectives

The 2017 participant survey was designed to achieve three main objectives. First and foremost, the survey intended to give the organizers of the festival an in-depth understanding of the festival participants. This meant asking the participants about various aspects of their festival participation, including:

- ✓ Why they participated in the festival
- ✓ How they had heard about the festival and where they found further information about the festival
- ✓ How many concerts they attended and how they chose which concerts to attend
- ✓ What makes a festival/concert interesting and how they would describe the Copenhagen Jazz Festival
- ✓ How often they listen to music and what genres
- ✓ Their satisfaction with this year's festival and whether they would recommend the festival to others

Secondly, the survey aimed at looking specifically at the participants at the age of 18-35, in order to find out how this segment took part in the Copenhagen Jazz Festival and how satisfied they were with the experiences. This was done because Copenhagen Jazz Festival has been trying to attract more participants from this specific age group, therefore, part of the objective of this survey was to find out whether they had succeeded.

Finally, the survey aimed at investigating the participants' perception of and how they used Copenhagen as a tourist destination, whilst in Copenhagen. These questions focused on topics such as:

- ✓ Length of stay and accommodation while in Copenhagen
- ✓ Topics that the tourists were interested in
- ✓ Visiting attractions and tourist sites
- ✓ How they found information about Copenhagen
- ✓ Participation in other events in Copenhagen
- ✓ Their primary and secondary motivations for visiting Copenhagen
- ✓ How they would describe Copenhagen

The results of these questions are discussed and illustrated in the following report.

Data collection

The survey was designed as an online questionnaire survey that respondents could access through an e-mail invitation. Interviewers were on location at venues around Copenhagen during the Copenhagen Jazz Festival and asked participants whether they would like to complete the survey. Those who agreed gave the interviewer their e-mail address and received an initial invitation with a link to the survey.

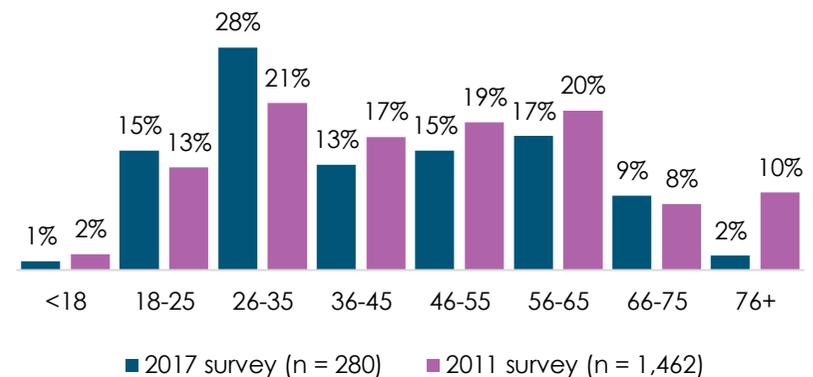
Respondents who had yet to successfully complete the survey a week after the initial invitation received a reminder. Another final reminder was sent out one week after the first reminder.

A total of 1,587 respondents received the initial survey invitation. 1,364 respondents received the first reminder and 1,289 received the second and final reminder. This resulted in a total of 280 successful questionnaire completions, which equals a response rate of 17.6%.

Limitations

Given the fact that the festival does not require a participant to sign up or register, in order to participate in the festival, there was no official data on the demographics of the participants. Therefore, a comparison was made to a 2011 Copenhagen Jazz Festival survey, which was the closest thing to an official demographic overview. The more similar the demographic data of these two surveys were, the more likely it was that the data collected in this survey would be a good estimate of the average Copenhagen Jazz Festival participant. Note that while there was no full demographic overview to compare to, the 2011 survey had 1,491 successful survey completions, which meant that the 2011 dataset, all else equal, was more likely to be representative of the demographic distribution amongst Copenhagen Jazz Festival participants. The 2011 dataset was, however, also 6 years old, which meant that there was a risk of it being outdated. Therefore, it was not possible to confirm the correct value in case of variations between the two datasets, but it was assumed that the 2011 dataset was more representative, given its larger sample size.

Comparing the age of the respondents in the two datasets gave the following result:



As the graph above shows, the age distribution of the respondents in the two surveys were fairly similar. There were slight variations between the age groups, but that was to be expected given the fact that respondents were chosen randomly, the time difference between the surveys and the relatively small sample size of the 2017 survey compared to the 2011 survey.

Looking at the nationality of the respondents in the two surveys showed that:

- ✓ 85% of the respondents in the 2017 survey were Danish citizens, while 91.4% in the 2011 survey were Danish citizens
- ✓ 87.4% of the Danish respondents in the 2017 survey lived in the Capital Region of Denmark (excluding Bornholm), while this was the case for 78.1% in the 2011 survey

This resulted in a difference of 6.4% and 9.3% for the two variables respectively, which was not necessarily a problem, but should be kept in mind. The differences had two main effects:

- ✓ A higher percentage of international respondents in the 2017 survey
- ✓ A lower percentage of Danish tourists (non-local Danish respondents) in the 2017 survey

The real problem with the 2017 survey, however, was that both groups (international and Danish tourists) contained a low number of respondents (42 and 30, respectively). The smaller the sample is, the more likely the results are to differ from the population, which means that the results cannot be assumed to be accurate estimates of the opinions and preferences of international and Danish tourists, respectively.

The respondents were, therefore, analyzed as one group, both in terms of them being Copenhagen Jazz Festival participants and as tourists in Copenhagen.

Report structure

This report aims to fully highlight all noteworthy statistics about the survey respondents. In order to make the report as easy to read as possible, only statistics that are significant will be included when comparing opinions and preferences across age groups, gender, nationality or other variables. Therefore, if one or more significant difference between two groups of survey participants is mentioned, but certain variables are left out of the comparison, it should be assumed that these variables were left out due to a lack of significant differences between the two groups of respondents for the given variables.

Key findings and recommendations

This section summarizes some of the key findings from the analysis and how the Copenhagen Jazz Festival can use these findings going forward.

NPS vs. word-of-mouth recommendations

The 2017 Copenhagen Jazz Festival received a Net Promoter Score (NPS) of 73, which was, in part, achieved by 76.8% of the survey respondents identified as promoters for the event, making them likely to talk positively about the event to others as well as to recommend the event to others. This is a very high NPS, which indicates a high degree of satisfaction with the Copenhagen Jazz Festival amongst the survey respondents.

This can, furthermore, be compared to the number of respondents who said that they heard about the event through word-of-mouth communication (either face-to-face or through online recommendations). 28.2% initially heard about the festival through friends, family or colleagues, while 24.3% said that they received further information through either friends and family or online recommendations. This suggests that there is a potential for more word-of-mouth recommendations that is not necessarily being fully exploited.

One way to make more use of the participants who were willing to promote the event to others could be to create more shareable content and host more active discussions about music/concerts/festival on social media and try to get more people involved through these discussions, including people who have not previously participated in the festival.

Another way to increase word-of-mouth recommendations could be to host competitions on social media. This could, for instance,

be competitions where the participants have to post pictures of the experiences in the festival or write a text about their thoughts on a topic/experience, while including a hashtag such as #CPHJazz2017. The main goal would simply be to create more word-of-mouth communication about the festival, while the competition aspect would be to incentivize participants to create social media posts, for a chance to win free concert tickets at the next year's event or some other prize.

A majority of repeat participants

The majority of this year's survey respondents were repeat participants in the Copenhagen Jazz Festival. Specifically, 80.7% of the respondents had participated in the festival at least once before, while 49.6% of the respondents had participated more than three times previously. The fact that a lot of respondents were repeat participants further underlines their satisfaction with the festival.

Mostly Danish participants

85% of the survey respondents were Danish citizens and 74.3% lived within the Capital Region of Denmark. In the 2011 survey, 91.4% of respondents were Danish citizens, which means that the percentage of international participants has increased during the last six years and could suggest that the festival is becoming more recognized internationally.

It is possible that the percentage of international participants can be further increased by increasing marketing efforts in other countries, starting with the closest markets of Germany, Sweden, Norway and England given the relatively short travel distance to Copenhagen and the fact that these markets have been four of

the five most popular tourist nationalities every year since before 2007. Currently, however, England is the most popular nationality amongst tourists in Copenhagen, making England a good place to test new marketing-initiatives. The effects need to be measured and compared to the 2017 and 2011 survey results.

Attracting millennials

One of the objectives of this study was to find out how millennials differ from the other age groups and whether the Copenhagen Jazz Festival's attempts of attracting more millennial participants have been successful.

Based on the results, there are a few ways that the Copenhagen Jazz Festival might be able to attract more millennials. First and foremost, millennials seemed to rely more on information from their friends and family, which means an increase in word-of-mouth from previous participants of the festival, might help increase the number of millennial participants in future festival. Specifically, 51.7% of the millennials who were first time participants heard about the festival through friends, family or colleagues and 34.5% received further information about the festival from friends and family. If these millennials could then be convinced to bring their friends and family along to the next festival, it could potentially create a stream of new millennial participants every year.

Secondly, the results suggest that millennials are particularly motivated by an enjoyment of participating in cultural and social events. If the Copenhagen Jazz Festival promotes the cultural and social experiences of the festival more in future marketing material, it might help attract more millennials.

Thirdly, more millennials searched for information about prices compared to the other respondents. Similarly, the millennials also put more emphasis on price being an important aspect of concerts. Rather than changing any of the prices associated with participating in the Copenhagen Jazz Festival concerts, the

organizers could put more emphasis on the value that the millennials get for their money, in the festivals marketing material. In other words, put emphasis on the musical, cultural and social experiences that the millennials receive when they pay to participate in the Copenhagen Jazz Festival. Alternatively, create marketing material aimed towards millennials focusing on the free concerts that are available during the given year's festival.

Finally, note that the number of new participants amongst millennials was 24.2% compared to 15.6% amongst the other respondents. This suggests that the organizer's efforts to attract more millennials to the festival have worked. The above suggestions are merely possible ways of further increasing the number of yearly millennial participants, in addition to the effects of the current efforts to attract millennials.

Recommending the Copenhagen Jazz Festival

One way to measure satisfaction with an event like the Copenhagen Jazz Festival is to calculate a so-called Net Promoter Score, or NPS, for the event. This NPS is based on a question asking respondents how likely they are to recommend Copenhagen Jazz Festival to others, on a scale from 0 to 10. The respondents are then split into three groups based on their score.

The first group is the promoters, who chose a score of 9 or 10 when asked how likely they were to recommend the event to others. These respondents are considered ambassadors for the event and will generally be very likely to speak positively about and recommend Copenhagen Jazz Festival.

The second group is the passives, who chose a score of 7 or 8. These respondents are considered satisfied with the event, but not enough to actively promote it to others. These respondents do not have a negative impact on the reputation of the event, but they do have an effect on the final NPS. The NPS is calculated based on the difference between the number of promoters and the number of detractors relative to the total number of respondents, which means that a higher number of passives will lower the NPS.

The third group is the detractors, who chose a score of 6 or less. These respondents are the least likely to exhibit value-creating behaviour and as such the number of detractors will have a large impact on the NPS.

The Net Promoter Score is measured on a scale from -100 to 100. A NPS of -100 means that every single respondent was a detractor and the general satisfaction with the event was very poor, while a NPS of 100 means that every single respondent was a promoter and the general satisfaction with the event was very high. The NPS is offset by the number of passives which will have a negative impact on the NPS given that a higher number of passives increases the overall sample size and thus decreases the size of the promoters relative to the overall size of the group of respondents.

Copenhagen Jazz Festival received a NPS of 73, which means that there were more promoters amongst the survey participants, than there were passives or detractors. Specifically:



76.8% of the survey participants were promoters

19.6% of the survey participants were passives

3.6% of the survey participants were detractors.

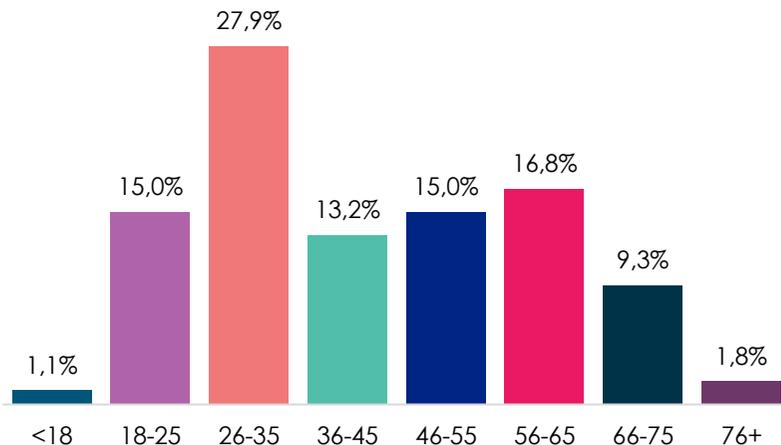
This can be compared to other events that, like Copenhagen Jazz Festival, focus on promoting artistic abilities and creations. As an example, CPH:DOX 2017 received a NPS of 45 and the 2017 CLICK festival received a NPS of 48. Compared to these two events, a score of 73 can be considered very good. Furthermore, the maximum NPS achievable is 100, which the Copenhagen Jazz Festival was relatively close to.

Demographics

This section takes a closer look at the age and nationality distribution of the survey respondents, as well as the distribution of Danish participants who lived in the different regions within Denmark.

Popular with all age groups

Looking at the age distribution of the respondents, the Copenhagen Jazz Festival was popular among all age groups. The youngest respondent was 16 years old, while the oldest was 84 years old, which is a difference of 68 years between the youngest and the oldest participant. The distribution of age is illustrated in the graph below.



A majority of Danish respondents

The majority (74.3%) of respondents were Danes who lived within the Capital region of Denmark. The remaining 25.7% were split between international and Danish tourists as follows:

- ✓ 15.0% were international tourists
- ✓ 10.7% were Danish tourists

The Danish tourists (Danish respondents living outside the Capital Region), were split somewhat evenly amongst the other regions of Denmark, with the exception that only three respondents lived in the region of Northern Jutland and no respondents lived on Bornholm:

- ✓ 87.4% of the Danish tourists lived in the Capital Region of Denmark
- ✓ 4.6% of the Danish tourists lived in the region of Zealand
- ✓ 3.8% of the Danish tourists lived in the region of Middle Jutland
- ✓ 2.9% of the Danish tourists lived in the region of Southern Denmark
- ✓ 1.3% of the Danish tourists lived in the region of Middle Jutland
- ✓ None of the Danish tourists were from Bornholm

The percentage of Danish participants in the 2011 survey was 91.4%, which might suggest that this year's event had a higher percentage of international participants. This cannot however, be confirmed without further research.

Analysing the musically interested

This section takes a closer look at the respondents as festival participants, including how they heard about the festival, how many concerts they participated in, their overall preferences for festivals and more.

First and foremost, 4.3% of the respondents worked or studied specifically within the field of jazz music, while another 8.2% worked or studied within the music industry in general.

Searching for information about artists/concerts

The most sought-after information during the Copenhagen Jazz Festival was information about concerts that took place during the event and the various artists who were performing in them. 80.7% of the respondents searched for information about concerts and artists, while:

- ✓ 57.9% searched for information about The Copenhagen Jazz Festival program
- ✓ 52.5% searched for information about venues
- ✓ 29.3% searched for information about prices
- ✓ 11.1% searched for information about activities
- ✓ 10.4% searched for information about locations combining food/drink with a concert
- ✓ 3.6% searched for information about other aspects of the festival, but these were mainly combinations of the above-mentioned topics

In total, 96.1% of the respondents searched for information about at least one aspect of this year's Copenhagen Jazz Festival.

Repeat participants

The majority of respondents in this year's survey were repeat participants in the Copenhagen Jazz Festival. As many as 47.1% of the respondents said their initial source of information about the festival was previous participation. However, as many as 80.7% said that they had previously participated in the Copenhagen Jazz Festival:

- ✓ 37.5% had participated more than 5 times before
- ✓ 12.1% had participated 4-5 times before
- ✓ 23.6% had participated 2-3 times before
- ✓ 7.5% had participated once before
- ✓ 19.3% were participating for the first time

The second most popular source, from which the respondents had heard about the festival, was through family, friends and colleagues (28.2%), which is an option that was chosen by 22.1% of the repeat participants.

Lastly, previous participation was a more common source of information for older respondents (>45), while friends, family and colleagues were a more common source of information amongst the younger respondents (<46).

Getting inspired by the Copenhagen Jazz Festival

This year's Copenhagen Jazz Festival had more than 1,300 concerts that the participants could attend at venues around the city of Copenhagen. This means that while respondents might have planned which concerts that they wanted to attend before participating in the festival, it is likely that at least some of the participants discovered new concerts during the festival that they had not previously known about. As it turns out:

- ✓ 40% of the respondents said that they became inspired to attend more concerts than they had initially planned, while attending the festival
- ✓ 32.5% of the respondents attended the concerts that they had initially planned attending
- ✓ 17.5% of the respondents attended fewer concerts than they had initially planned attending

The respondents were, furthermore, asked how many concerts they attended:

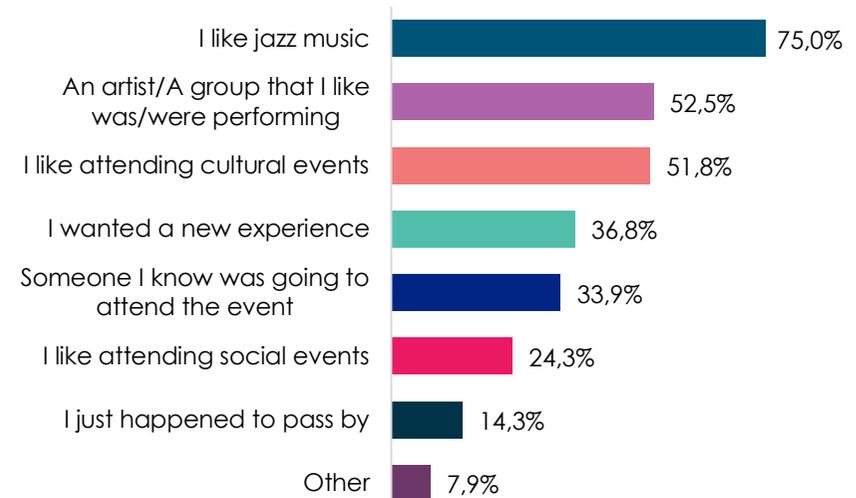
- ✓ A total of 1,686 concerts were attended
- ✓ On average, the respondents attended 4 concerts

Lastly, 4.7% did not know the concerts they were attending were part of the Copenhagen Jazz Festival.

Jazz enthusiasts

The main reason for attending the Copenhagen Jazz festival for most respondents (75%) was, not surprisingly, that they like jazz music. Around half did, however, say that they also attended because they like participating in cultural events and around a fourth of the respondents participated because they enjoy participating in social events, as shown in the graph below:

Reasons to participate



n = 280

Interestingly, 36.8% of the respondents said that they attended because they wanted a new experience. This, on one hand, suggests that they viewed the Copenhagen Jazz Festival as a good place to receive new experiences, but, on the other hand, also suggests that they might require the festival to be very innovative to make them attend in the future, if their decision to attend a given event is usually based on whether or not it will allow them to try something that they have not experienced before. Furthermore, 24.3% of these said that the festival was varied in terms of the content included in the event.

Getting information through the official website

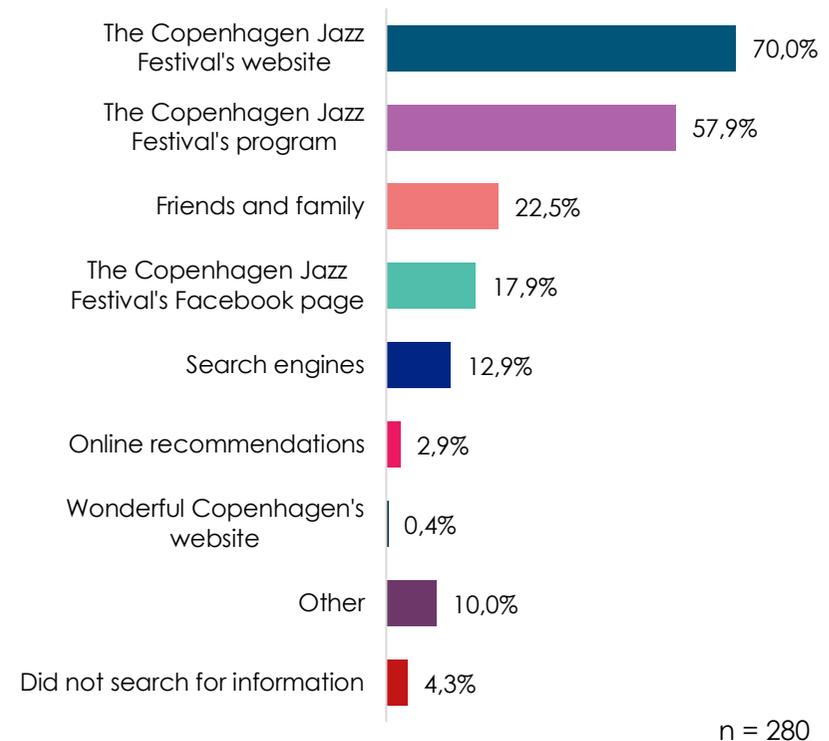
70% of the respondents used the official Copenhagen Jazz Festival website to get information about the event, with the second most popular option (57.9%) being the festival program specifically. This program could also be found on the website, meaning that there is an overlap between these two answers. Specifically, three fourths of the respondents who used the official program as a source of information also used the official website to find information.

The third most popular source of information was used by a quarter of the respondents, which was friends and family. Comparing the respondents who received information from friends and family to the ones who received information from online recommendations means that 24.3% of the respondents received information from a source that can be classified as word-of-mouth. Part of the content on the Copenhagen Jazz Festival Facebook page as well as part of the content on search engine results can also be classified as word-of-mouth, but not all results will fall under this category, which is why those two options are not included.

Finding out how many respondents received information through word-of-mouth is important because it can be used as an indication of how willing participants have been to share their experiences about the festival and recommend it to others. 76.8% of the respondents in this year's event were promoters, which is about three times as high as the number of respondents who said that they received information from family and friends or online recommendations. Assuming the Copenhagen Jazz Festivals during the previous 2-3 years have had a similar number of respondents who were willing to promote the event, it suggests that there is a word-of-mouth potential that has not been utilized fully. This suggests that the Copenhagen Jazz Festival might be able to convince participants to spread more information through word-of-mouth by hosting competitions on social medias

like Facebook or Instagram. This could, for instance, be a competition where participants are asked to make posts about their experiences during the festival, while using a hashtag such as #CPHJazz17. These posts would then be seen by the participants' friends and family, thus creating a flow of word-of-mouth information about the festival.

Information sources



Lastly, the majority of respondents said that they searched for information both before and during the festival. Specifically:

- ✓ 64.3% searched for information both before and during the festival
- ✓ 20.1% only searched for information during the festival
- ✓ 15.6% only searched for information before the festival

The artist(s) and the sound quality

The respondents were asked which aspects of a concert they thought were the most important, in order to find out how their experience at the individual concerts during the Copenhagen Jazz Festival can be optimized.

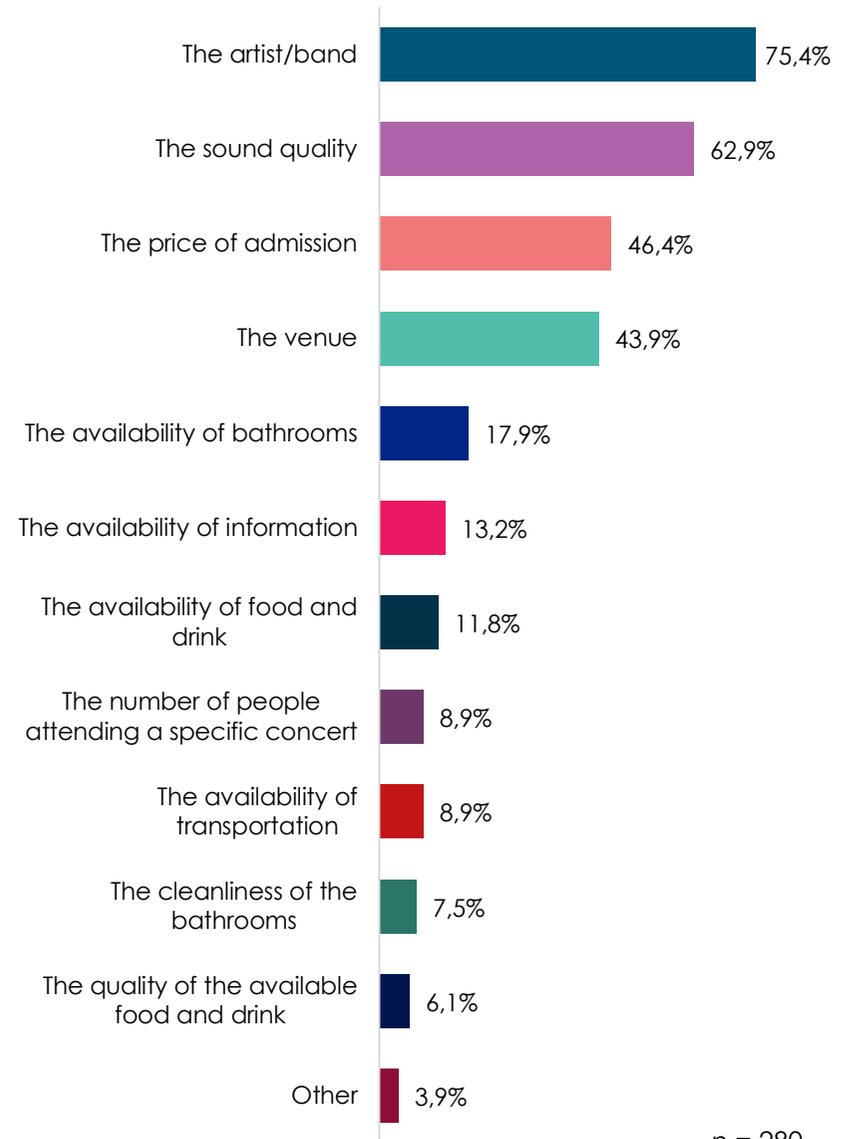
The two most chosen aspects had to do with the performing artist(s) and the sound quality at the concert, both of which were to be expected given that these two aspects combined create the main experience of a concert.

This was followed by the price of admission to attend the concert as well as the venue at which the concert was held. Both aspects were in the top 4 topics that the respondents searched information about. What is interesting, however, is that 46.4% of respondents said that the price of admission was an important aspect of a concert and yet just 29.3% of the respondents looked for information about the prices of the concerts included in the 2017 Copenhagen Jazz Festival.

The opposite was the case in terms of venues. More respondents searched for information about the venues of the concerts in the 2017 Copenhagen Jazz Festival than the number of respondents who said that the venue is an important aspect of a concert. Specifically, 52.5% of respondents said that they searched for information about venues, while just 43.9% of respondents said that the venue is an important aspect of a concert.

It is, furthermore, interesting that just 13.2% of the respondents said that availability of information was an important aspect of a concert, given that 96.1% of the respondents searched for information about at least one aspect of the Copenhagen Jazz Festival.

Important aspects of a concert

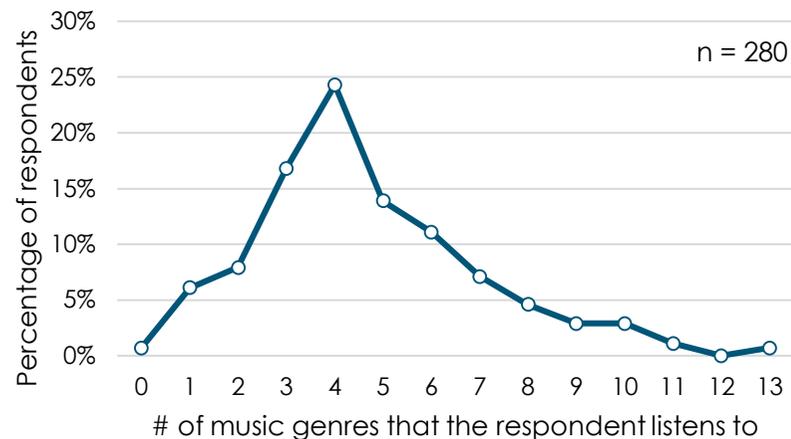


n = 280

Listening to rock, pop and classical music

When the respondents were asked what their favorite genres of music were, most of them, not surprisingly, said jazz. The respondents were, however, interested in a wide variety of musical genres, given that more than 50% of the respondents said that they enjoyed listening to rock, pop and classical music.

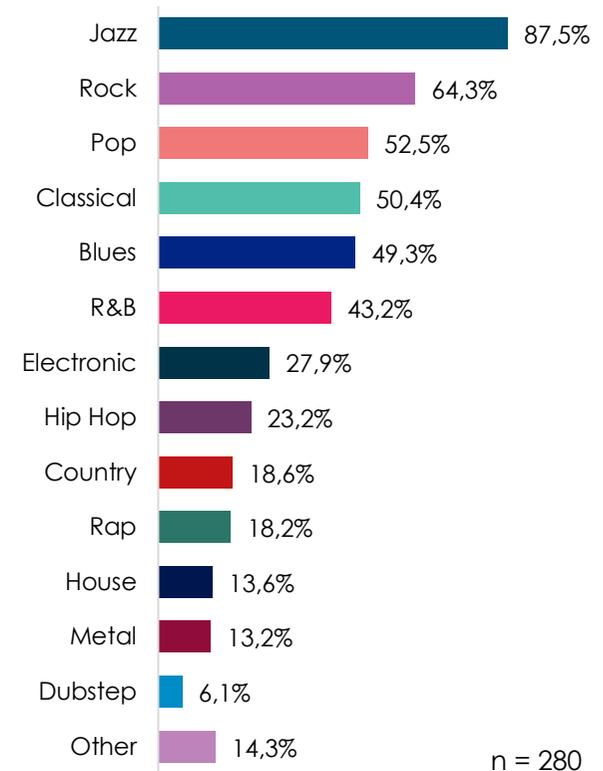
All in all, the respondents were interested in a total of 1,310 genres, which resulted in an average of 4.7 genres for each respondent. The most popular number of genres chosen were four. The graph below shows the percentage of respondents who liked 0, 1, 2 ... etc. of the mentioned genres:



Specifically, two thirds (66.1%) of the respondents were interested in between 3 and 6 different genres.

Furthermore, 68.9% of the respondents said that the Copenhagen Jazz Festival inspired them to listen to bands/artists that they did not know before participating in the festival.

Music genre preference



The 245 respondents who said that they listened to jazz were, furthermore, asked how often they listen to jazz as well as whether or not they had listened to more jazz after participating in the festival.

- ✓ 22.9% listened to jazz daily
- ✓ 13.1% listened to jazz every other day
- ✓ 27.3% listened to jazz every 3-5 days
- ✓ 32.2% listened to jazz less than every 5 days
- ✓ 4.5% did not know how often they listened to jazz
- ✓ 26.9% said that they have listened to music more often, after participating in the festival

A varied, entertaining and cultural festival

The Copenhagen Jazz Festival writes the following about the organizers approach to the festival:

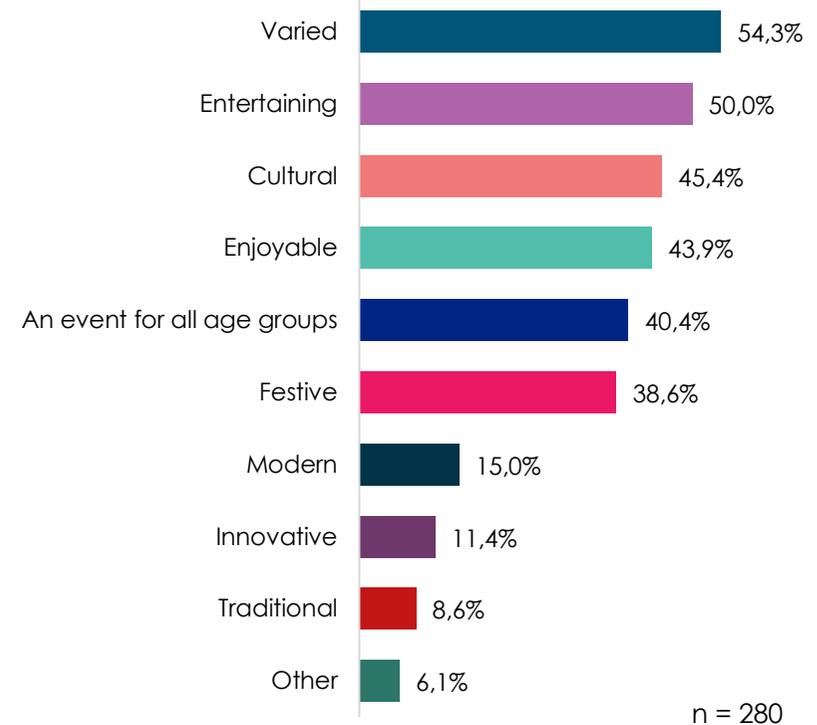


The survey participants were asked which of the themes on the right that they thought best describes the Copenhagen Jazz Festival. Based on these results, the respondents seemed to agree that the festival has a unique atmosphere, which is a combination of the festival being varied, entertaining, cultural, enjoyable and festive. In other words, it is a very fun atmosphere with a lot of different experiences.

The respondents furthermore seemed to agree that the festival is an event for all people regardless of their age and knowledge of jazz.

What stands out the most is that 15% or less thought that the festival was modern or innovative, which does not reflect the festival's sharp focus on new departures in Danish and international jazz. Furthermore, modern and traditional are usually opposites in terms of describing an event, which makes it curious that the festival was found to be neither.

The Copenhagen Jazz Festival is...



Attracting millennials

One of the goals of this survey was to specifically look at the respondents aged 18-35 (the millennials), to see how they felt about the Copenhagen Jazz Festival, how they participated in the activities associated with it and whether the festival's efforts to attract more participants in this age range, had been successful. Therefore, this section looks specifically at how the millennials differ from the respondents in the other age groups.

120 out of the 280 respondents in the survey were in the age group of 18-35 and hence millennials.

Being introduced to the festival by friends and family

While most of the respondents knew about the festival from previous participation in the event, the most popular source of awareness amongst the millennials was friends, family and colleagues. This was the case for 35.8% of the millennials, while the second most popular source (34.2%) was previous participation. Comparing this to the answers from the respondents in the other age groups, 56.9% said that they knew the festival from previous participation, while just 22.5% said that they had heard about it through friends, family and colleagues.

More new festival participants

24.2% of the millennials said that this year was their first time participating in the Copenhagen Jazz Festival, while this was the case for 15.6% of respondents in the other age groups. The most popular answer amongst the millennials, however, was that they had participated 2-3 times before. This was the case for 28.3% of the respondents. Comparatively, the most popular answer amongst the respondents in the other age groups was that they

had participated more than 5 times before. This answer was chosen by 51.9% of the respondents.

Enjoy attending cultural events

51.8% of all respondents said that they participated in the Copenhagen Jazz Festival because they enjoy attending cultural events, but there was a difference in the number of respondents who agreed to this amongst the millennials and the other respondents. Specifically, 61.7% of the millennials said that one of the reasons that they participated was that they enjoy attending cultural events, while 44.4% of the other respondents agreed.

Similarly, 30.8% of the millennials said that they enjoyed attending social events, which was only the case for 19.4% for the other respondents.

This suggests that one of the ways to attract millennials, is to put emphasis on how participating in the event will let them enjoy cultural and social experiences.

Getting information through word-of-mouth sources

The two groups' usage of the listed information channels was overall similar with the exception of two specific sources. The millennials were less likely to use the official festival program to get information, with 46.7% of the millennials getting information from the program compared to 66.3% in the other age groups. On the other hand, more of the millennials received information from their friends and family, with 31.7% of the millennials choosing this as one of their sources, compared to just 15.6% amongst the other respondents.

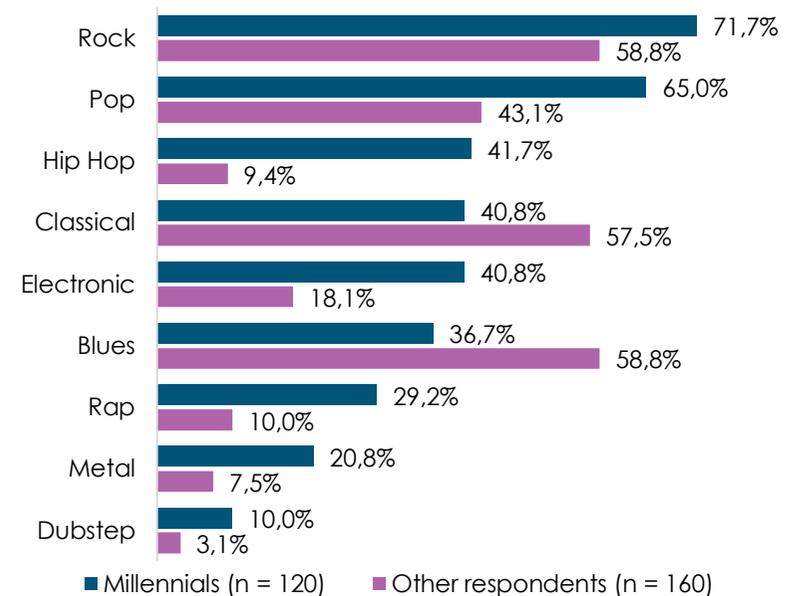
Furthermore, it seems that the millennials overall had an easier time finding information, given that 85% of the millennials said that they found it easy to find the information they wanted as opposed to 76.8% of the other respondents.

The topics that the respondents wanted information about were overall similar, except for information about the prices associated with participating in the festival concerts. 36.7% of the millennials searched for information about prices, while 23.8% of the other respondents searched for information about prices. While this might be assumed to be because there could have been a lot of students amongst the millennial respondents, further analysis showed that between the respondents aged 18-25 and 26-35 it was the respondents aged 26-35 who mainly searched for information about prices. Specifically, 42.3% of respondents aged 26-35 looked for information about prices, while just 26.2% amongst the 18-25 years old looked for the same information.

This price focus could furthermore be seen when looking at what aspects of concerts the two groups of respondents thought were important. 57.5% of the millennials thought that the price of admission was an important aspect of a concert, while 38.1% of the other respondents thought the same.

Listening to different genres of music

Lastly, there was a difference between the two groups' preference for music genres. More than 84.9% of the respondents in both groups said that they enjoyed jazz, which is not surprising given that they attended the Copenhagen Jazz Festival, but there were differences in the preference of some of the other music genres, as shown in the graph below:



The millennials, on average, said that they listened to 5.2 different genres, while the other respondents, on average, said that they listened to 4.2 different genres. There was, in other words, a slight difference in the number of different genres that the two groups listened to, on average.

Understanding the musical tourists

This section takes a closer look at the tourists attending the festival. Tourists here identified as all international and non-local (i.e. living outside the Capital Region of Copenhagen) Danish participants. Out of the 280 respondents in this survey, 42 were international and 30 were Danish tourists.

Due to the low number of respondents in either of these two groups, they were combined and analyzed as one group rather than looking at them individually. This means that it will not be possible to identify any difference between Danish and international tourists and that the results, instead, will represent an approximation of the average tourist in the city of Copenhagen, regardless of nationality.

Staying an average of 5 nights

When the tourists were asked how many nights they spent in Copenhagen, their answers varied from day visits (no nights) to more than a month. In total eleven respondents said that their stay was 30 nights or longer, which was either due to them being international visitors studying/working in the Capital Region of Denmark or, in the case of a few, being Danes who lived in the region of Zealand, but who counted that as staying in the Capital Region. These respondents have been excluded for the purpose of calculating the average number of nights that the tourists spent in Copenhagen. This resulted in an average of 5 nights spent in Copenhagen amongst the Danish and international tourists.

Staying with friends/family or in a hotel

The most popular accommodation option amongst the tourists was staying with friends/family, which was chosen by 36.1%. This was followed by hotels in which 29.5% chose to stay. The remaining 34.4% were split between Airbnb, other types of rental and camping.

Primarily return visitors to Copenhagen

The majority (78.4%) of the tourists in the survey were return visitors to Copenhagen, with 61.9% of the 42 international respondents having been to Copenhagen before.

Amongst all tourists:

- ✓ 66.2% had been to Copenhagen four or more times before
- ✓ 2.7% had been to Copenhagen three times before
- ✓ 1.4% had been to Copenhagen twice before
- ✓ 8.1% had been to Copenhagen once before
- ✓ 21.6% were first time visitors in Copenhagen

Booking the visit in advance

Most of the respondents (62.5%) had planned their visit to Copenhagen more than a month before departure, with 34.7% planning the visit four or more months in advance. This was the case for both Danish and international tourists, but amongst the international tourists specifically, 14.3% planned the trip less than a month in advance, while 69% planned more than a month in advance and 45.2% planned four or more months in advance.

Motivations for visiting Copenhagen

29.2% of the respondents said that they travelled to Copenhagen primarily to participate in the Copenhagen Jazz Festival, while 30.6% said that it was part of the reason for their visit and 40.3% said that it had no influence on their decision to visit Copenhagen. Hence, the events were 'reason to go' for almost 60% of the tourists attending the event.

The respondents were then asked what their primary/secondary motivations for visiting Copenhagen was, depending on whether they said that attending the festival was their primary motivation for the visit or not. These answers have been combined in the graph on the right. The individual graphs for primary and secondary motivations can be seen in the appendix.

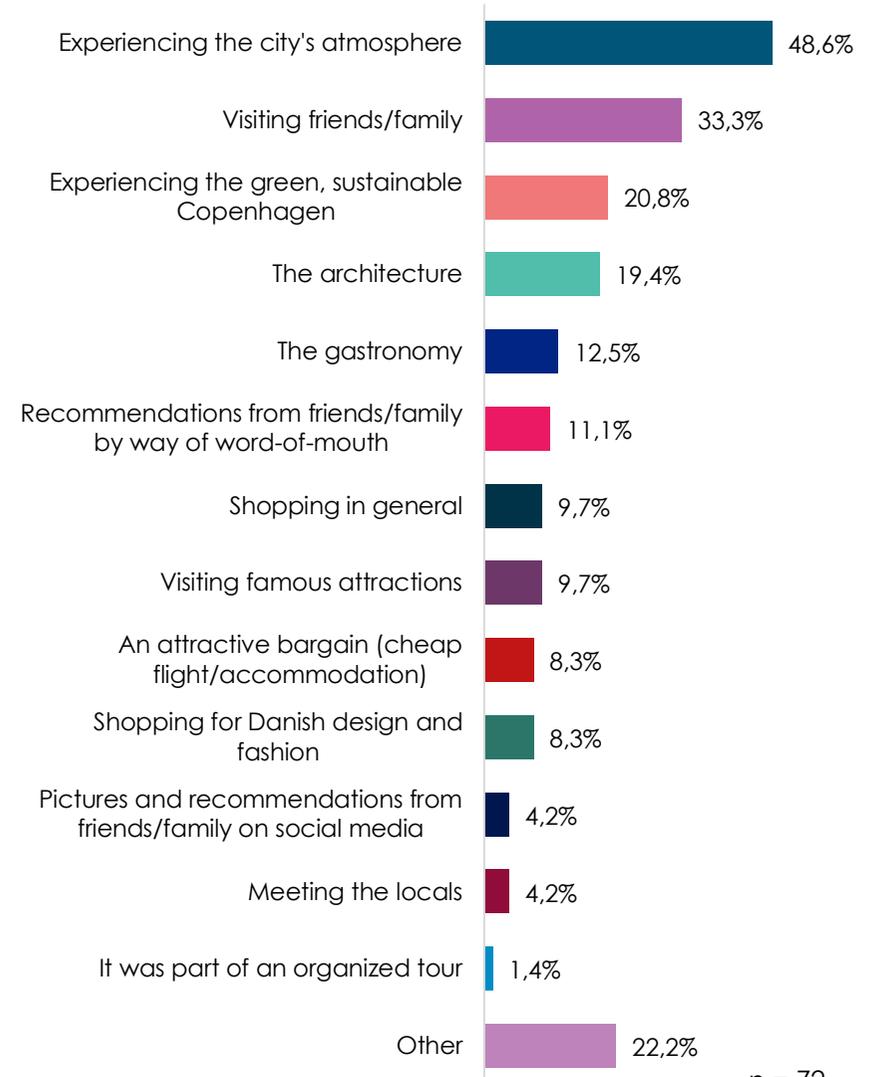
The most popular motivation for visiting the city of Copenhagen, was to experience the city's atmosphere, which 48.6% of the respondents chose as part of their motivation for the visit. Interestingly, 14 (93.33%) out of the 15 respondents who said that they were motivated to visit Copenhagen to experience the green, sustainable city also said that they were motivated by experiencing the city's atmosphere.

The second most popular motivation for travelling to Copenhagen was to visit friends and/or family. 33.3% of the respondents said that this was part of their motivation. This motivation combined with the 11.1% who were motivated by recommendations from friends and family as well as the 4.2% who were motivated by recommendations from friends/family on social media, means that 43.1% of respondents were, in one way or another, motivated to visit Copenhagen by their friends and/or family.

Interestingly, the third most popular options chosen was the "other" category. The answer given therein were, however, very varied and therefore did not suggest that there was a popular motivation that was excluded from the list above. The most

common mentions in the "other" category were different types of temporary study/work arrangements in the city.

Motivations for visiting Copenhagen



n = 72

Taking public transportation to cultural activities

The graph to the right shows which activities (besides attending the Jazz festival) the tourists were engaged in during their visit to Copenhagen.

60% used public transport whilst in Copenhagen. The most popular non-transportation activities, were cultural activities like visiting museums, attractions and tourist sites. 69.4% of the tourists took part in a cultural activity, in the form of visiting either an attraction, a museum, a tourist site or an art exhibition. 45.8% of the respondents visited two or more of these cultural sights, while 26.4% visited three or more and 18.1% visited both a museum, an attraction, a tourist site and an art exhibition.

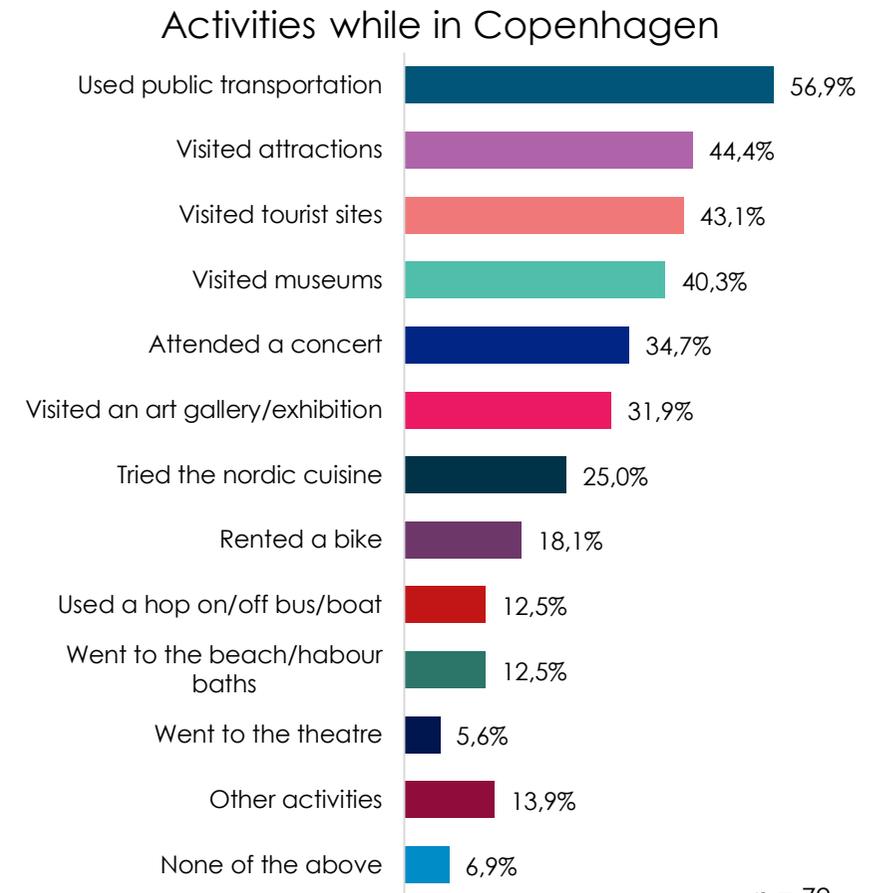
The data does not show how many of each of the different types of cultural activities that the respondents took part in and the difference between an attraction and a tourist site, for instance, was not clearly defined. It does however show that the respondents, according to their own definitions of these cultural locations, were interested in more than just one type.

25% of the respondents said that they tried the Nordic cuisine, which is interesting given that a third of the respondents said that they were interested in gastronomy. An interest in gastronomy does, however, not necessarily equal an interest in the food of other nations, but could simply be an interest in cooking, which could explain this difference.

Copenhagen is widely known to be a bike-focused city¹, which makes it interesting to see how many tourists decided to rent a bike while in the city. In the case of the respondents from this survey, 18.1% chose to rent a bike during their stay in the city.

¹ <http://www.visitcopenhagen.com/copenhagen/sightseeing/copenhagens-bike-culture> - <https://landarchs.com/bike-friendly-city/> - <https://www.wired.com/story/world-best-cycling-cities-copenhagenize/>

Lastly, 45.8% of the respondents planned their activities after arriving in Copenhagen, while 16.7% planned their activities a week or less before their departure. The remaining 37.5% either planned more than 2 weeks prior to departure or were not sure when they had planned their activities.



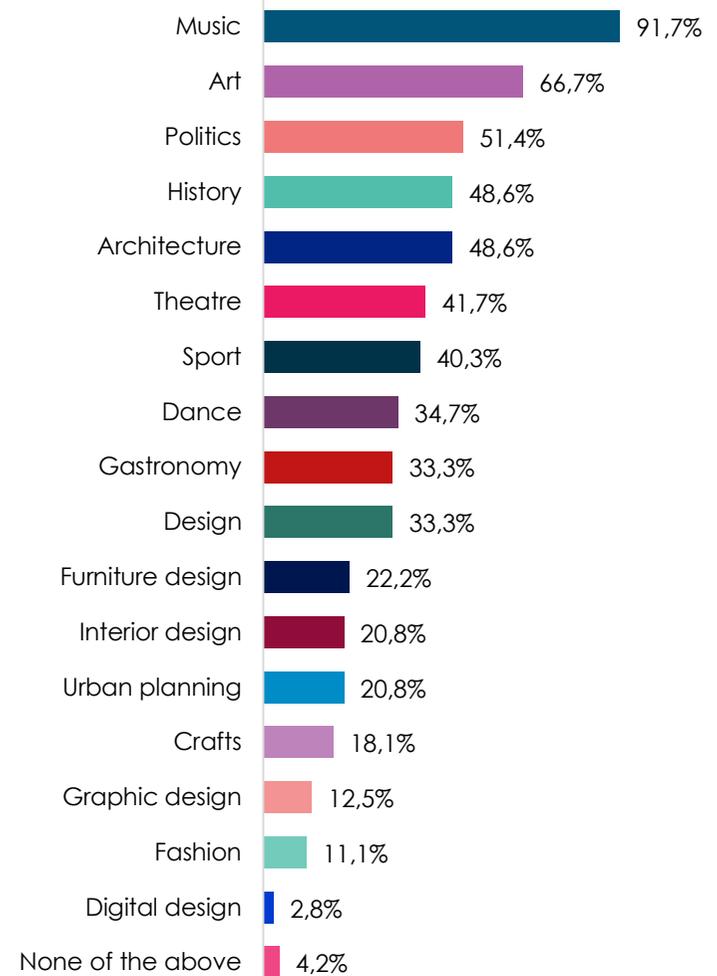
Interested in music, art and politics

91.7% of the respondents said that they were interested in music, which was the most popular topic of interest amongst tourists. Given that the respondents were participants in a music festival, it might seem curious that 8.3% did not say that they were interested in music, but keep in mind that 51.8% and 24.3% said that they attended the festival because they enjoy taking part in cultural and social events, respectively. Furthermore, it is possible that the respondents still enjoy music, but simply not enough to mark it as one of their interests.

The second-most popular topic was art, which was chosen by 66.7% of the respondents. This, more or less, matches the 69.4% of respondents who visited a cultural location, like a museum or an attraction. It was, however, higher than the percentage of tourists who chose to visit art galleries or museums specifically, given that 31.9% of the tourists say that they visited an art gallery and 40.3% said that they visited a museum. History and architecture were also topics that were high on the list, which was also to be expected given the number of respondents who visited a cultural location.

The respondents did, overall, have varied interests, given that ten different topics were chosen by at least a third of the respondents, while another three topics were chosen by 20% or more of the respondents. The respondents, on average, chose 6 different topics that they were interested in.

Topics of interest



n = 72

Googling information about Copenhagen

23.6% of the respondents said that they did not search for information about Copenhagen. Two thirds of these were Danish tourists, who were presumably already familiar with Copenhagen and/or general navigation in Denmark. Furthermore, 78.4% of the tourists in this year's survey said that they have been to Copenhagen at least once before, which means that they would already have at least some information/knowledge about the city.

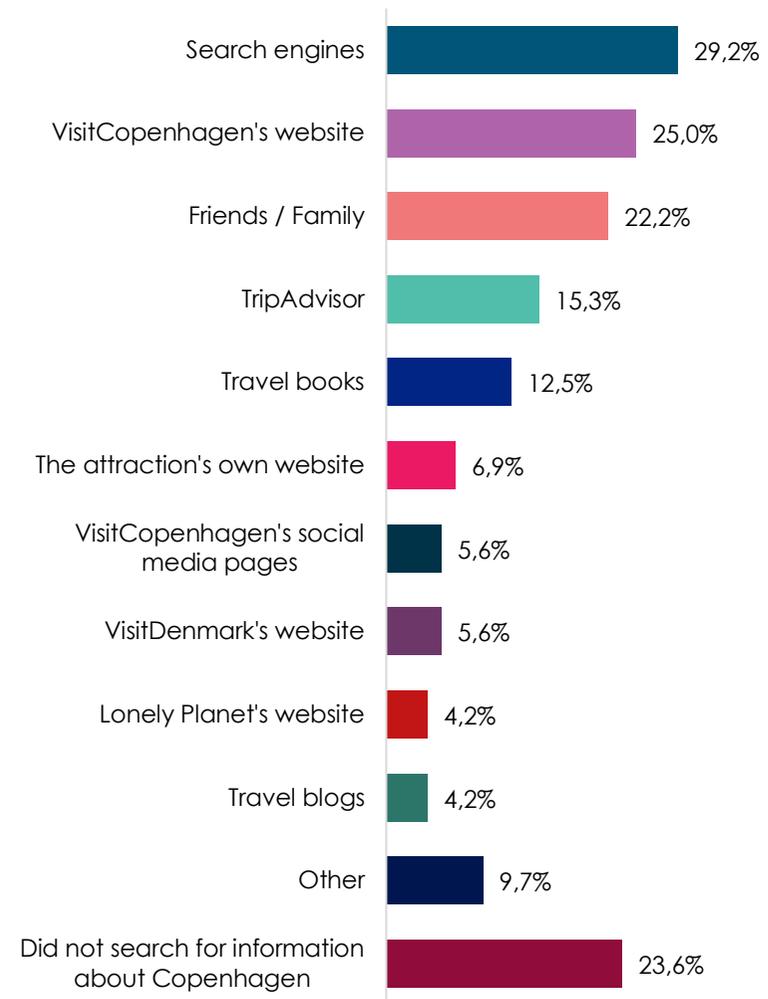
Amongst the rest of the tourists in the survey, search engines like Google or Bing were the most popular source of information. What is interesting, however, is that 25% of the respondents found information through the official tourist site for the city of Copenhagen, www.visitcopenhagen.dk. Furthermore, 5.6% received information from the city's official tourism Facebook page and 5.6% received information from Denmark's official tourism website, www.visitdenmark.dk. This means that 27.8% of the tourists in this survey received information from at least one of the official tourism communication channels for Denmark or Copenhagen. 6.9% used two or more of the official tourism communication channels and 1.4% used all three of the channels.

22.2% of the respondents received information from friends and/or family, which can be compared to the fact that 11.1% said that part of their motivation for visiting Copenhagen was recommendations from friends/family and 4.2% said that part of their motivation for the visit was pictures and recommendations from friends and family on social media.

Lastly, several of the tourists used more traditional tourist focused sources of information. For instance, 15.3% of the respondents used TripAdvisor to get information about Copenhagen. In total 26.4% of the tourists used at least one of the international tourism communication channels, namely TripAdvisor, travel books, Lonely Planet's website or travel blogs. 40.3% of the tourists used

one of the mentioned tourism communication channels (Danish or international).

Sources of information about Copenhagen



n = 72

Looking for information about cultural activities

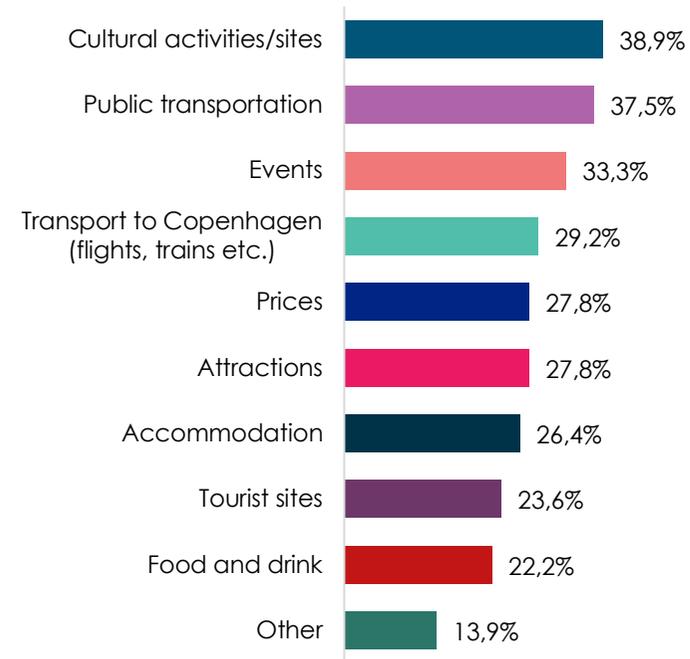
The most popular search topic in the respondents' search for information, was information about cultural activities/sites which was chosen by 38.9%. This was closely followed by information about public transportation, which 37.5% of the respondents searched for and events in Copenhagen, which 33.3% of the respondents searched for.

The fact that 33.3% of the respondents searched for information about events in Copenhagen creates the question of whether the respondents specifically planned to visit Copenhagen to participate in the Copenhagen Jazz Festival or whether they already had plans to visit Copenhagen and the festival happened to take place during their planned vacation days.

As mentioned previously, 29.2% of respondents travelled to Copenhagen primarily to participate in the Copenhagen Jazz Festival, which leaves 60.8% who had other primary motivations for their visit. Another 30.6% said that participating in the Copenhagen Jazz Festival was part of the motivation behind their visit. 41% of these said that they searched for information about events in Copenhagen.

Looking at the search topics reveals that three of them were quite similar, namely "cultural activities/sites", "attractions" and "tourist sites". When looking at all three of these search topics, it can be seen that 52.8% of the respondents searched for information about one or more of these three topics, all of which have to do with Copenhagen's cultural offerings.

Looking for information about ...



n = 72

Most of the respondents, furthermore, said that they looked for information both during their stay in Copenhagen and before they arrived in the city. Specifically:

- ✓ 69.1% searched for information both before and during their stay
- ✓ 16.4% only searched for information after arriving in Copenhagen
- ✓ 14.5% only searched for information before departing from their home town/country

75% of the respondents were able to find the information that they wanted and 70.8% found the information without any trouble, while 4.2% thought that it was difficult to find the information that they needed.

Participating in Distortion

When asked what events the respondents had previously participated in, the most popular event was the Copenhagen Jazz Festival itself. 51.4% of the respondents said that they had previously participated in the Copenhagen Jazz Festival, while the second most popular event, Distortion, had had 18.1% of the respondents as previous participants.

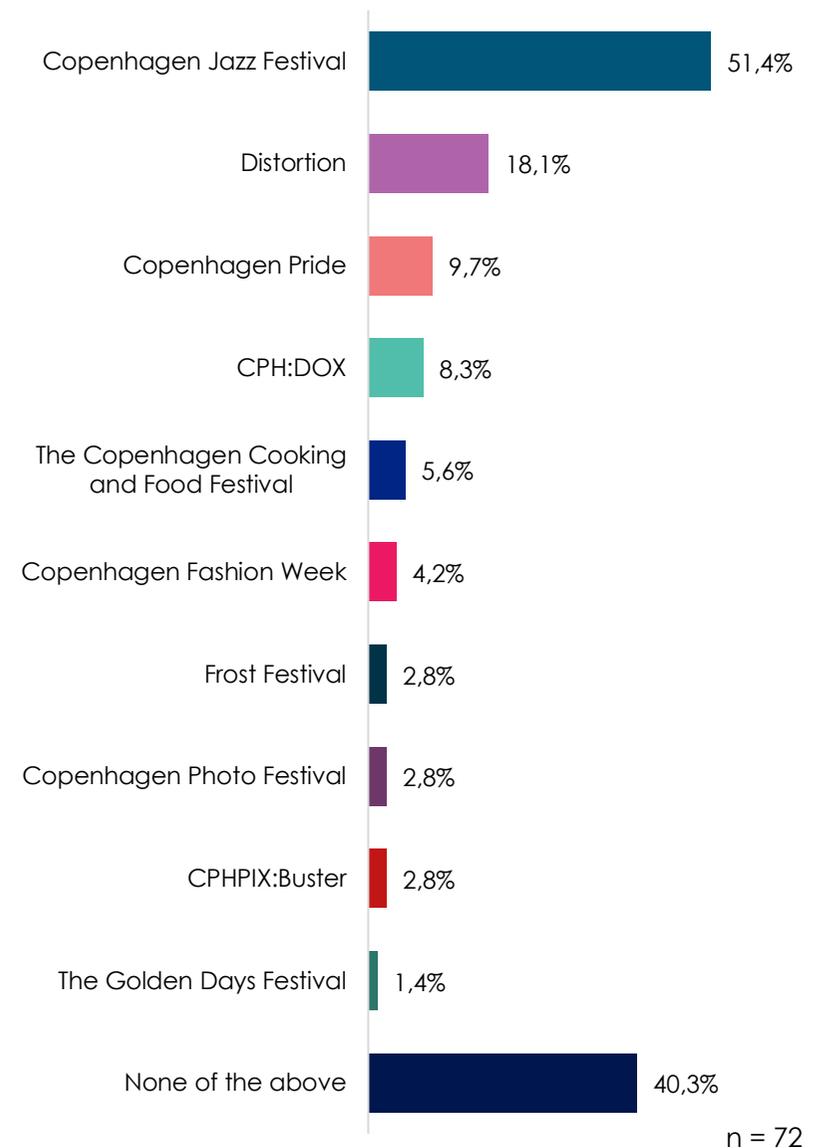
40.3% of the respondents answered that they had not participated in any of the listed events before. While this might seem like a high number compared to the 19.3% of all respondents who were participating in the festival for the first time, keep in mind that the sample for this section about tourists is fairly small (72) and that the majority of the respondents in the full sample, amongst which 19.3% were first time participants, were Danes living in the Capital Region of Denmark.

There were two events on the list that had a similar focus on music to the Copenhagen Jazz Festival. These were Distortion, which was the second most popular event on the list, and the Frost Festival, which only 2.8% had previously attended. The other events have foci on other things like gastronomy, videography and fashion, which could explain the lack of previous participation, if the respondents mainly want to attend music-focused events (91.7% were interested in music as a topic).

Thus, based on the answers from the tourists, there does not seem to be a correlation between participating in one event in Copenhagen and participating in other events. Even the two included music events had been attended by less than 20% of the respondents and less than 2/5ths of the tourists who had previously participated in the Copenhagen Jazz Festival.

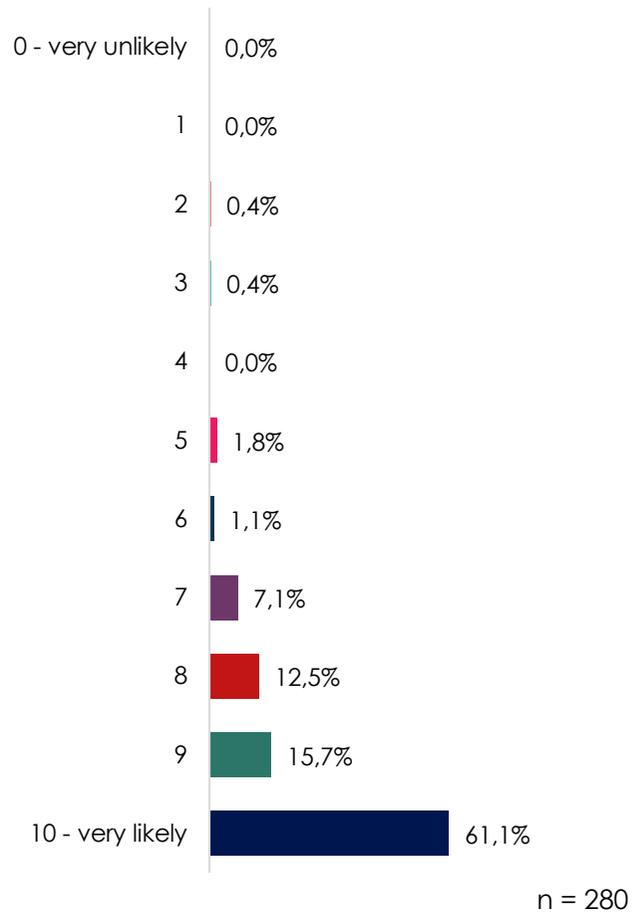
Comparing this to the genres that the tourists liked to listen to showed that 16.7% and 5.6% of them liked to listen to electronic music and dubstep, respectively, which are usually the two main genres played in the distortion festival concerts.

Previous participation in...

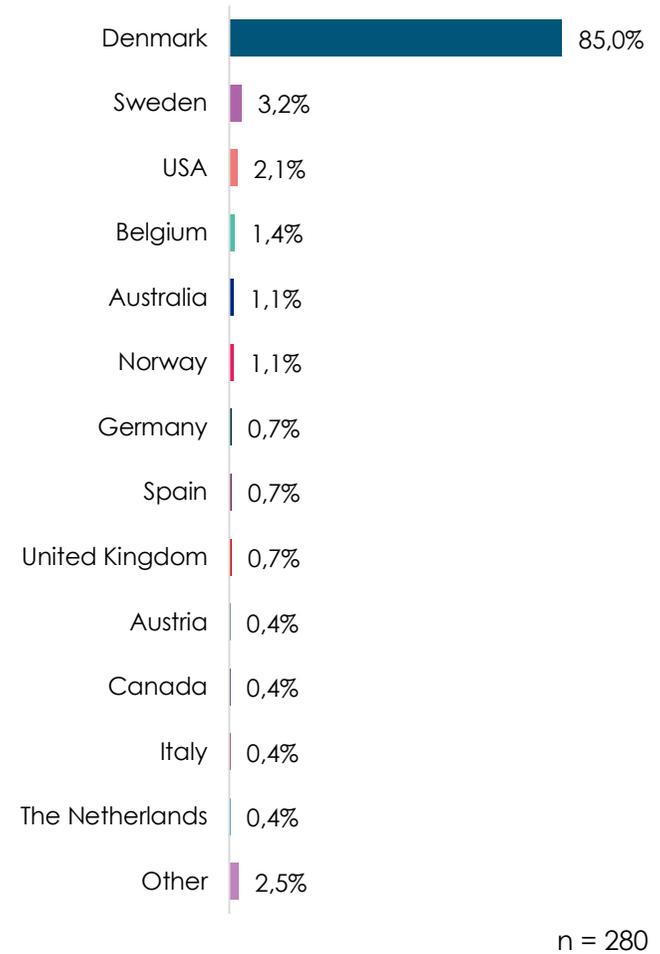


Appendix

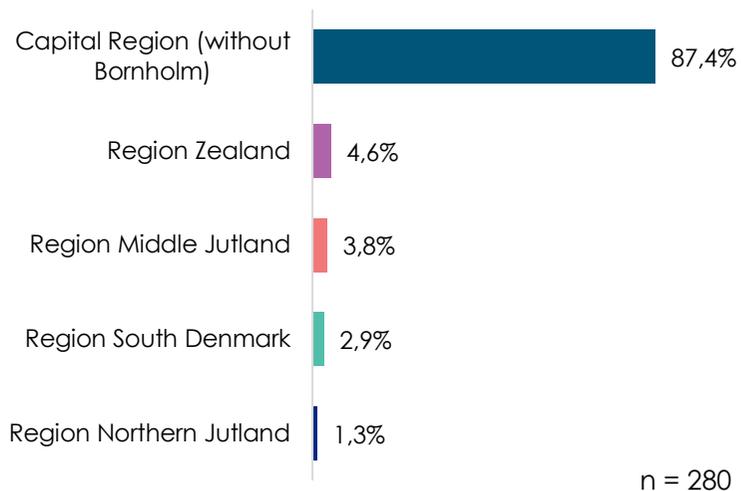
Likeliness to recommend the Copenhagen Jazz Festival



Nationality

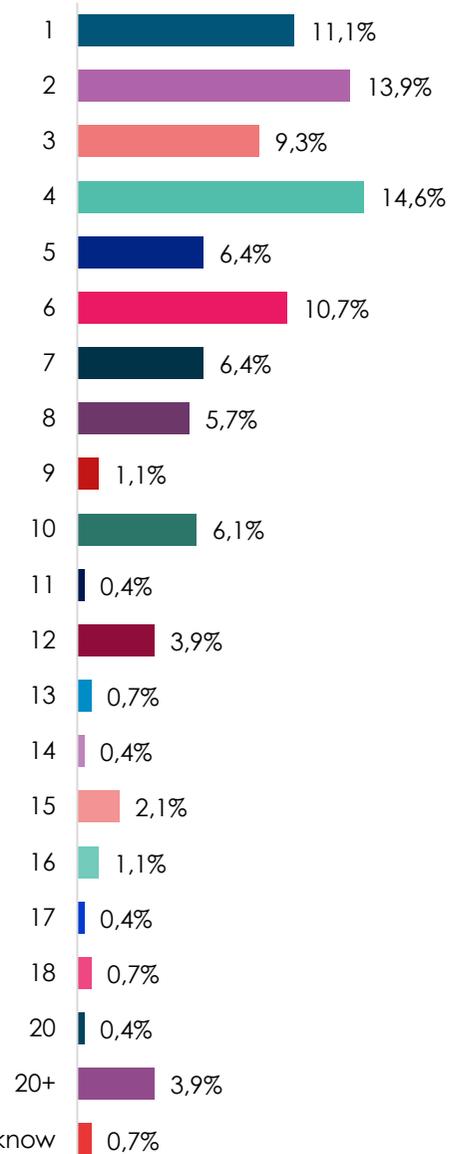


Region of Denmark



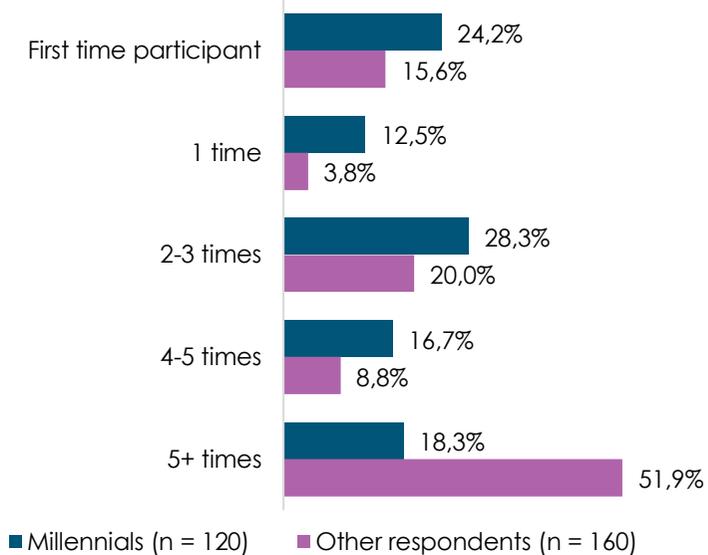
n = 280

Concerts attended

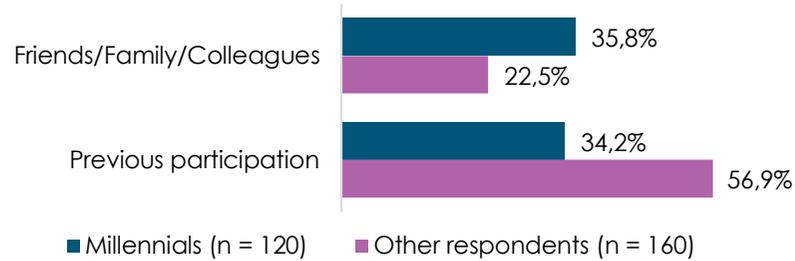


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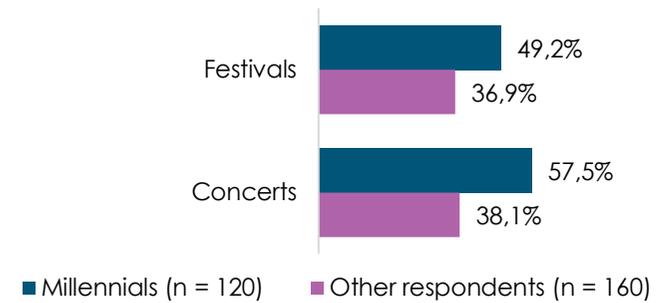
Previous participation



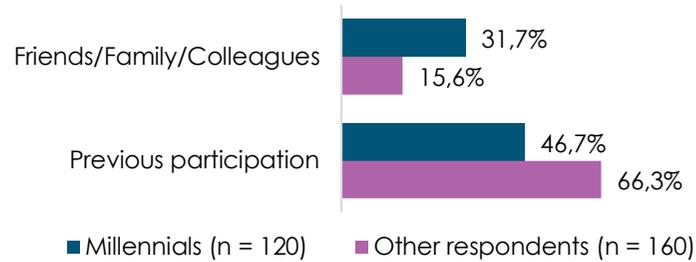
Introduced to the Copenhagen Jazz Festival by...



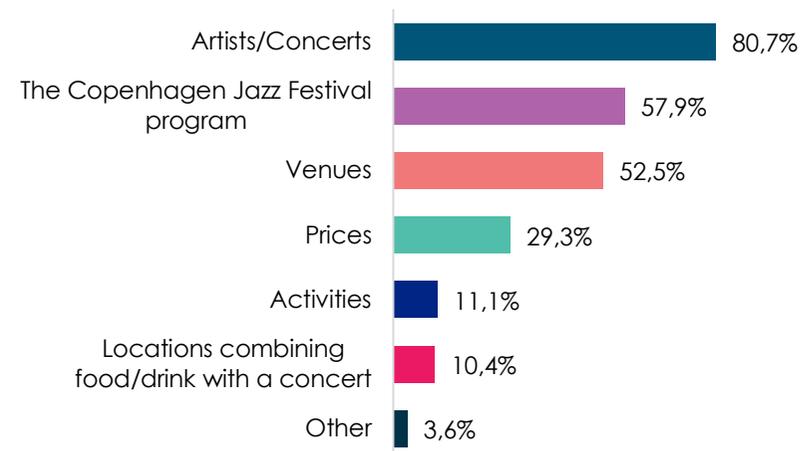
Price is an important aspect of...



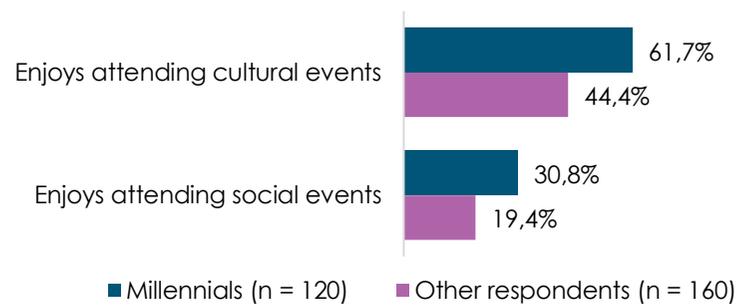
Getting further information about Copenhagen Jazz Festival from...



Searching for information about...

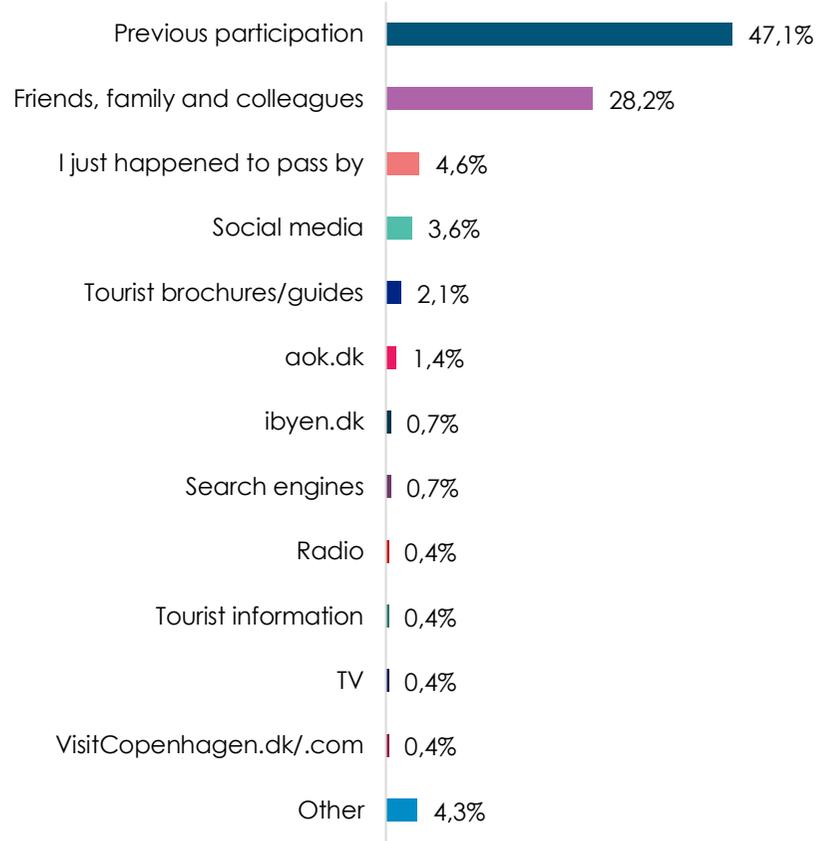


Reason to participate



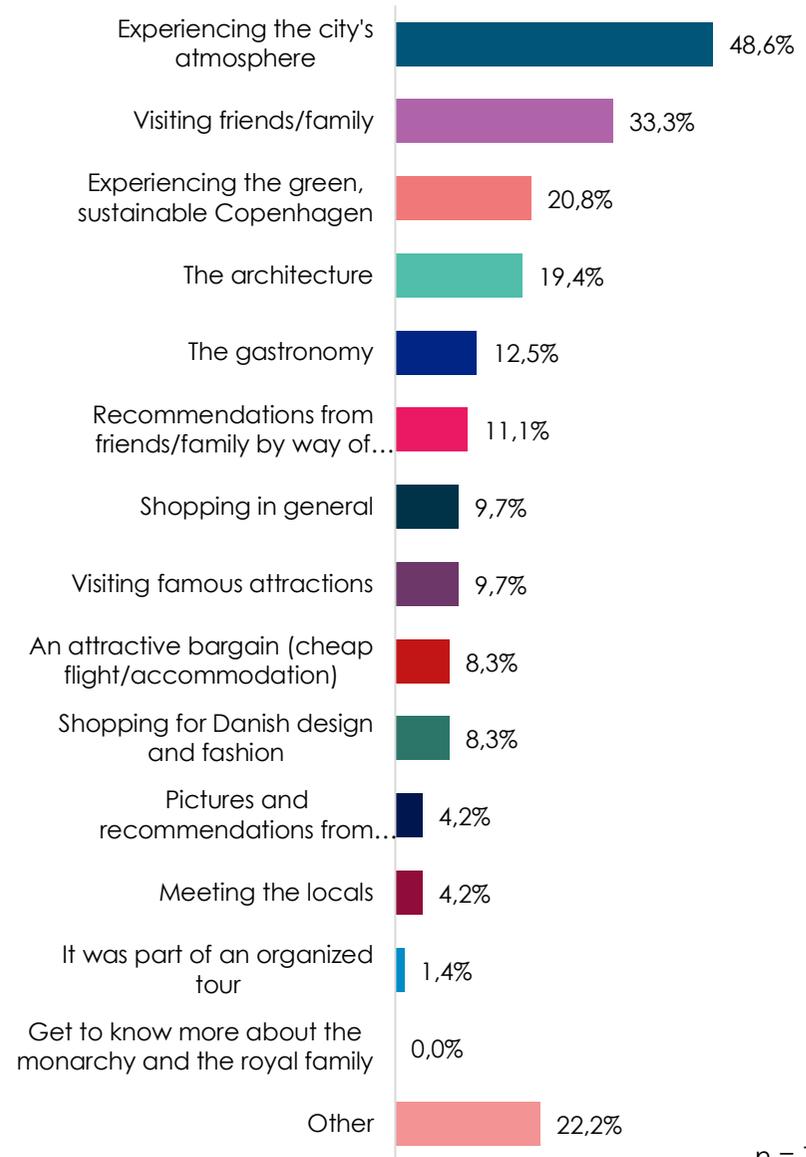
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Initial source of information about the Copenhagen Jazz Festival



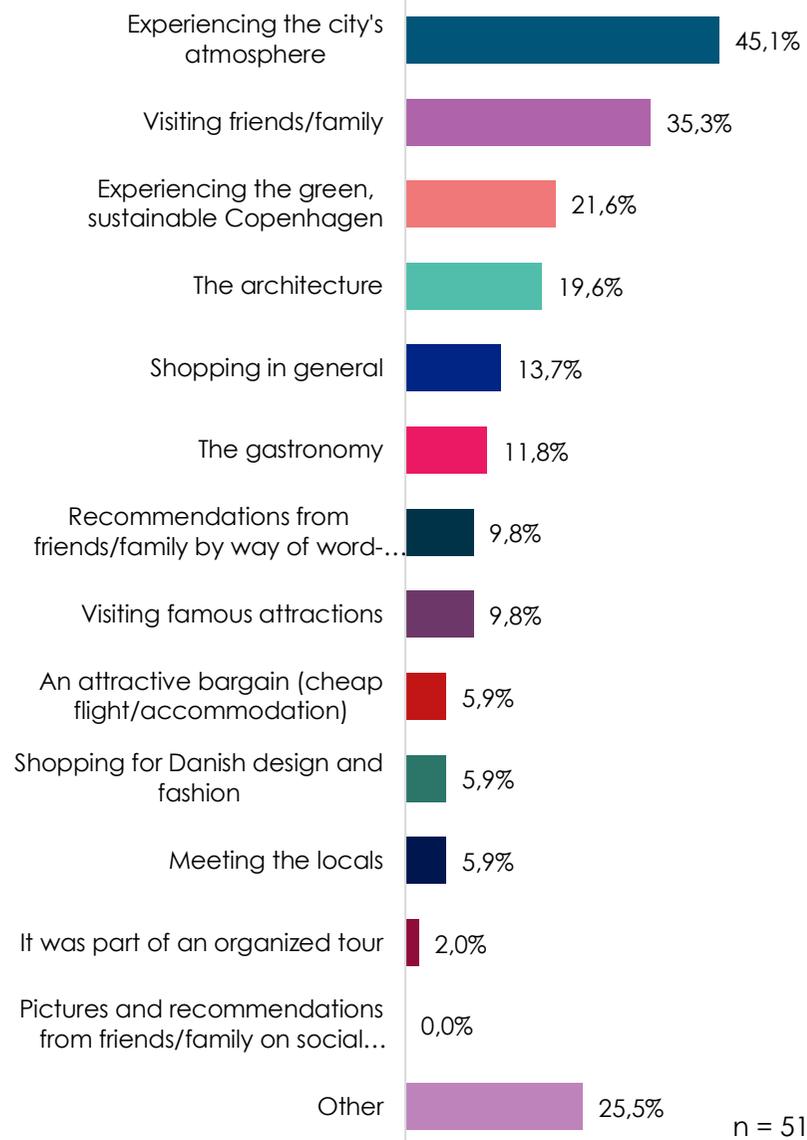
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Motivations for visiting Copenhagen

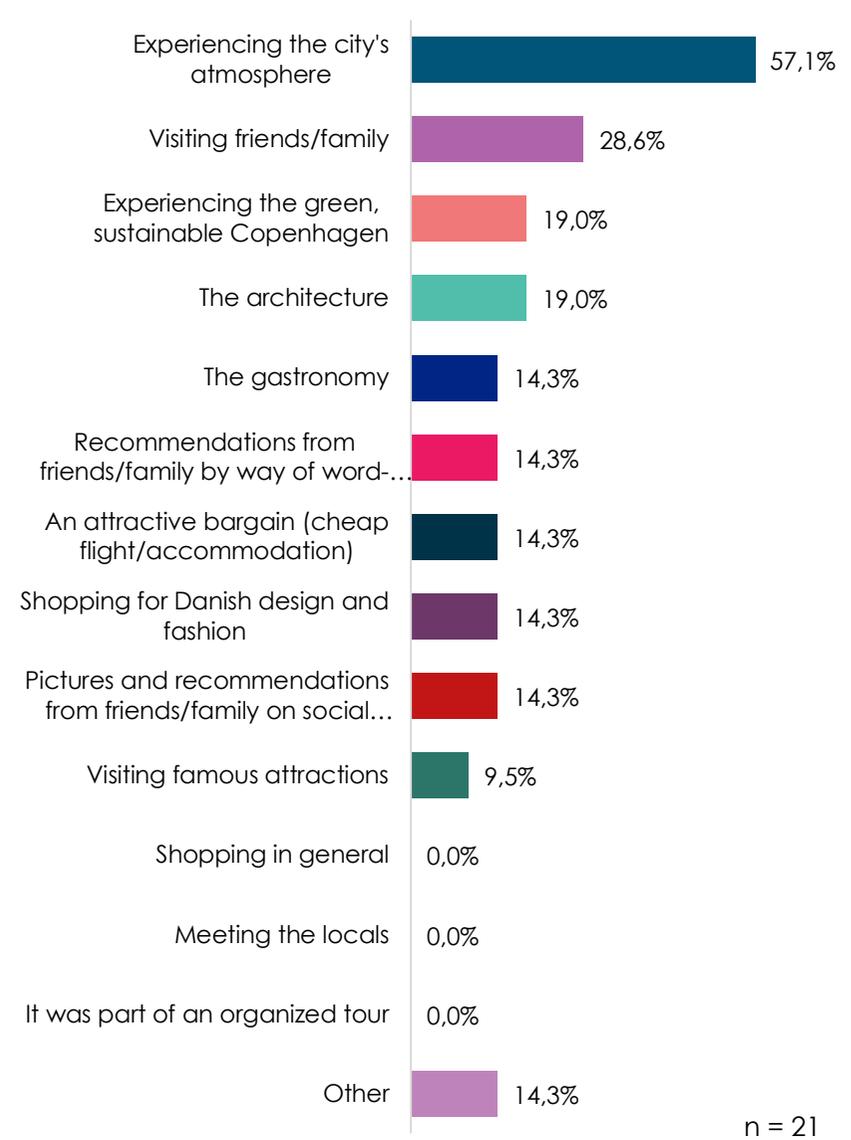


n = 72

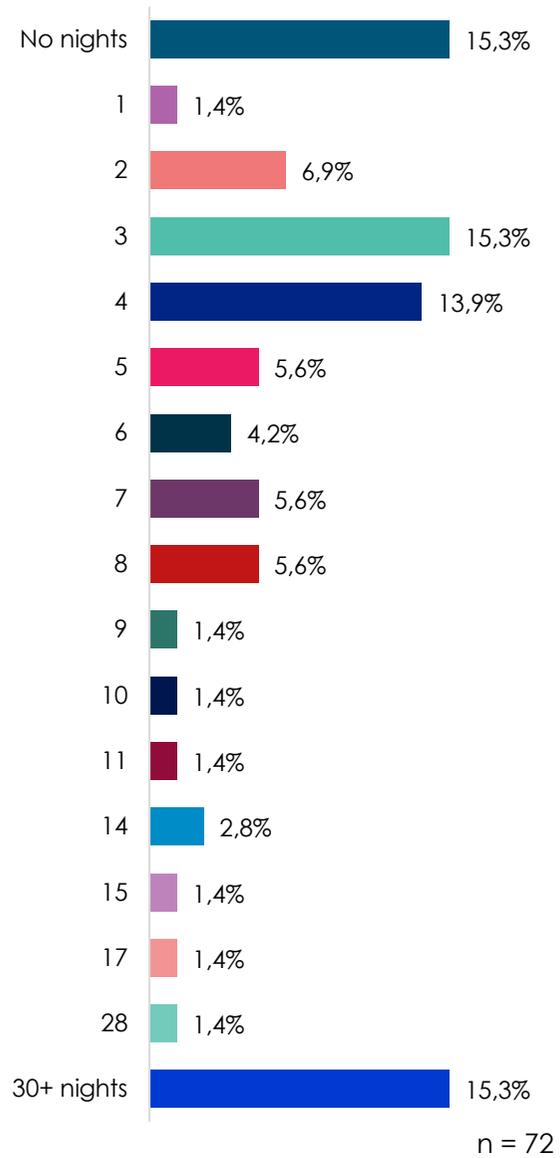
Primary motivations for visiting Copenhagen



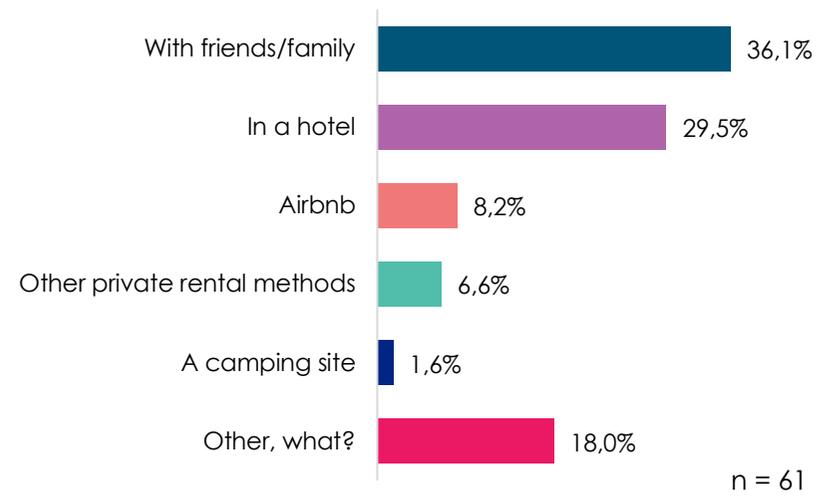
Secondary motivations for visiting Copenhagen



Nights spent in Copenhagen



Choice of accommodation method



For inquiries about this report please contact Analyst Mike Wedel Hansen at mha@woco.dk