



Travel flows and motivations

TRACKING MULTI-DESTINATION TRAVEL IN THE GREATER COPENHAGEN AREA

KAIROS FUTURE, DECEMBER 2019

**KAIROS
FUTURE**

A SUMMARY OF THE REPORT

Spreading out visits over the season and to new destinations is neither a small nor easy task – but in this report we have tried to highlight some useful old classic strategies that are still going strong, and some new insights that will hopefully give new inspiration to destination developers. For tourism professionals with long experience in the field, and for newbies in the field, the challenge of getting into the increasingly dominating Google selection will be a major task ahead!

If you don't have time to read through the findings, skip to chapter 6, insights and conclusions where you will find suggestions on how to develop tourism in the Greater Copenhagen Area, off the beaten tracks. In short:

1. Most important reason for not going outside Copenhagen/Malmö: "did not think about it!"
2. Smaller and unknown places can be made part of the base
3. Take inspiration from existing town-to-town links
4. In a time when time and energy are the scarce resources, packages are as hot as ever
5. All pull factors need to play together
6. Building routes through thematic storytelling is still a winner
7. It is all about naming and framing!
8. F&B trips is an interesting option for prolonging the season and reaching across borders
9. Soft adventure is best option for a large number of small destinations
10. Several windows of opportunity for inspirations before, in the beginning of and at the end of a trip
11. The challenge: getting inside the boxes
12. Still a classic: work with events, congresses, tech visits etc.

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1. ABOUT THIS STUDY

This research was conducted in order to gain a nuanced understanding of multi-destination travel patterns of travellers in the Greater Copenhagen area.

Research questions:

- Mapping of mobility patterns: understanding how people travel between destinations within the area
- Study of drivers, motivations, behaviours, and pull factors for multi-destination travel: understanding what makes travellers include destinations other than Copenhagen and/or Malmö in trip

Kairos Future carried out this study on behalf of the partners in Greater Copenhagen Tourism during 2019. The study consists of a survey of online data from different social media sources as well as field work in the Greater Copenhagen area during three seasons and on six sample spots as well as interviews with tourism professionals. This combined use of netnographic as well as ethnographic methods and expert interviews creates a broad picture as well as in-depth insight by using both quantitative and qualitative data. A more detailed description of the methods can be found in the end of the report.

Beside this report there is an extensive ppt-presentation with spottings, photos, quotes, more diagrams etc.

2. MAPPING OF MOBILITY PATTERNS

In short, this is how the nethnographic analysis worked: 390,252 reviews of attractions, hotels, and restaurants in the Greater Copenhagen area were collected from online review sites.¹ Reviews posted by people from Denmark and Sweden were removed from the data. Reviews posted shortly after one another by the same reviewer were identified as belonging to the same trip. 13,572 inbound trips were identified in this way. Then we analysed the data available about the trip, e.g. locations a traveller has posted reviews from, what type of review it was, what other places were visited etc. In this way we learnt quite a lot about the mobility patterns.

2.1 GEOGRAPHICAL TRAVEL PATTERNS

The network maps below visualise the aggregated travel flows within the Greater Copenhagen areas as assessed through the data analysis.

Figure 1 shows the travel network on a geographical network map. The colour intensity of the black and grey lines represent the numbers of identified trips that include a trip leg directly between two destinations.

Figure 2 is instead a “mathematical map” and thus holds other types of information. Locations typically combined in the identified trips are visualized close to each other. Circle sizes represent network centrality. The sizes of the links between locations represent travel flows. Travel flows in opposite directions between the same two towns can be distinguished by looking at links clockwise from the perspective of one of the towns: flows from a town come before flows to it. For example, the traveller flow from Malmö to Copenhagen is larger than the flow in the other direction. Links share the colour of their source locations.

¹ The reviews, which were collected in November 2018, were posted during 2015-2018 (a majority during 2017-2018).

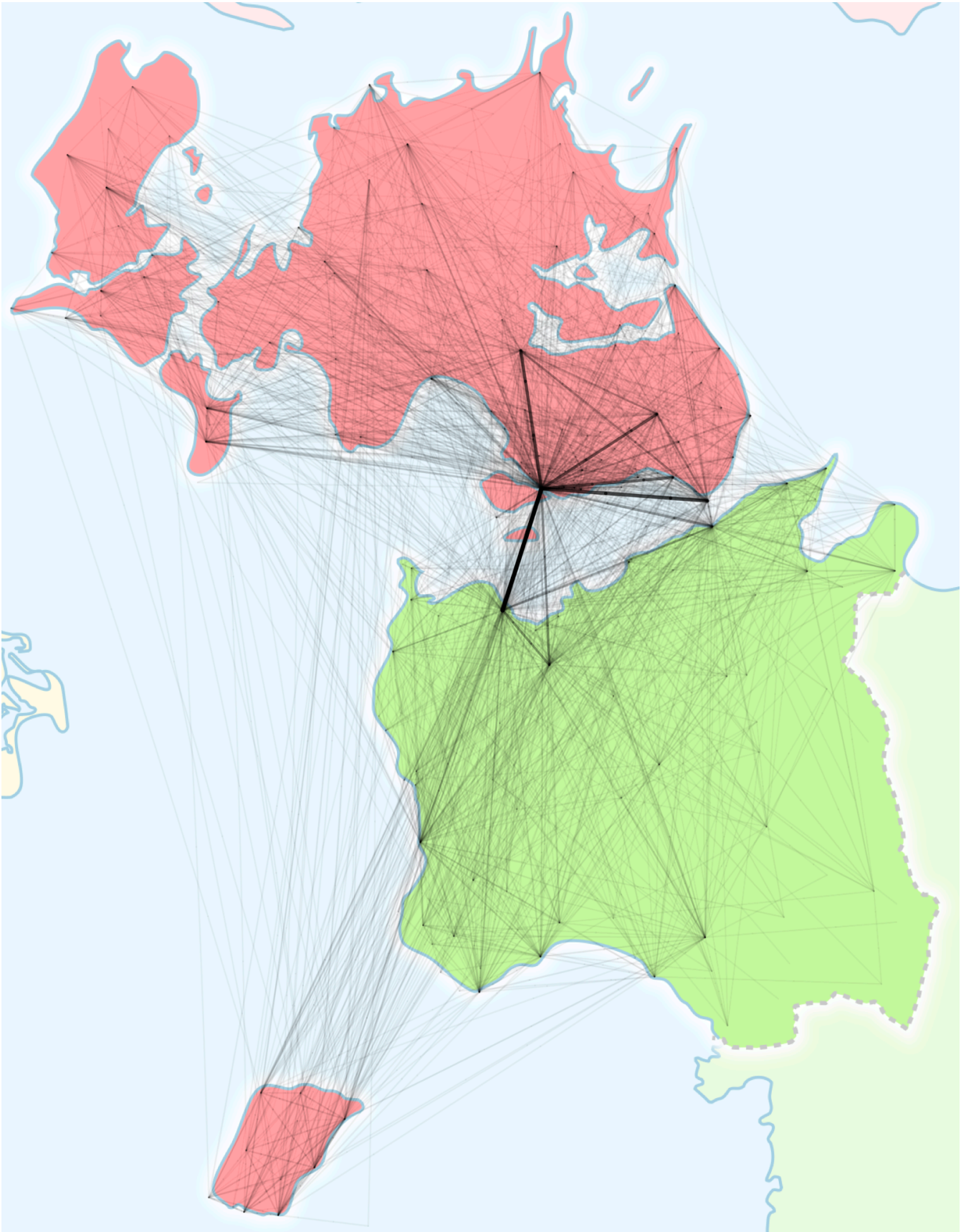


Figure 1 The figure shows the travel flows on a geographical map, with each link between two locations represented by a black line. The intensity of a line represents the number of trips in which a trip leg between the two locations was included.

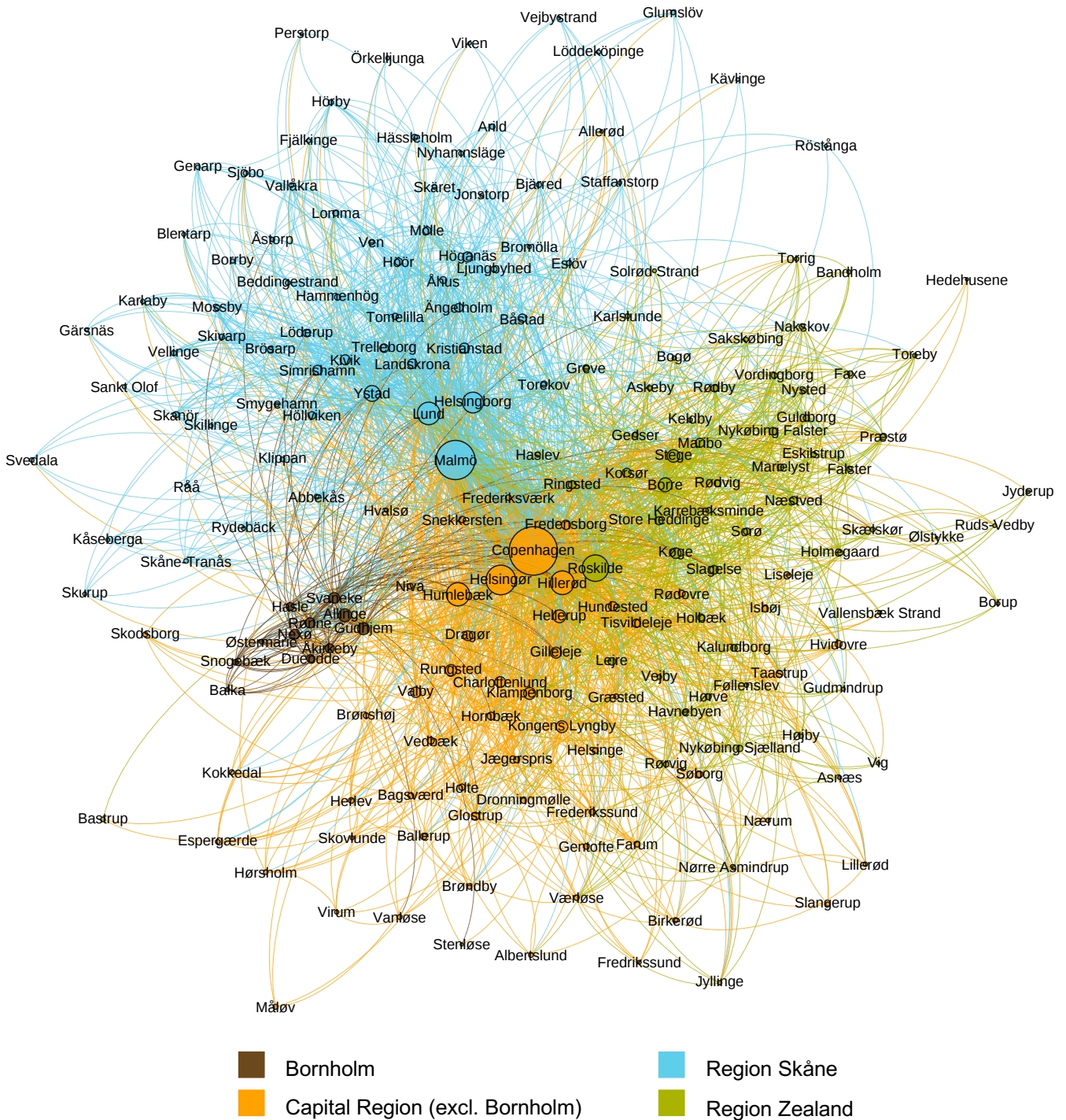


Figure 2. Locations typically combined in the identified trips are visualized close to each other. Circle sizes represent network centrality. The sizes of the links between locations represent travel flows. Travel flows in opposite directions between the same two towns can be distinguished by looking at links clockwise from the perspective of one of the towns: flows from a town come before flows to it. For example, the traveller flow from Malmö to Copenhagen is larger than the flow in the other direction. Links share the colour of their source locations.

Some key findings from the quantitative analysis of travel patterns in Greater Copenhagen area:

- Copenhagen’s central position in the network is striking.
- All regions are, to some degree, interconnected.
- Copenhagen has strong links with Malmö, Lund, Helsingborg, and Ystad. Other than those, the Danish and Swedish destinations do not appear to be closely integrated. This is illustrated by the locations in Skåne forming a cluster of their own.
- The destinations on Bornholm form an island of their own, which is natural given Bornholm’s relatively isolated location. Links can however be seen both to Copenhagen and to Skåne.
- Travel flows in opposite directions between the same two towns can be distinguished by looking at links clockwise from the perspective of one of the towns: flows *from* a town come before flows *to* it. For example, the traveller flow from Malmö to Copenhagen is larger than the flow in the other direction.

The most frequently travelled links are listed in fig. 3 (with travel flow directions taken into account) and fig. 4 (with direction not taken into account). Here it becomes even more clear how much the connection Malmö to Copenhagen dominates.

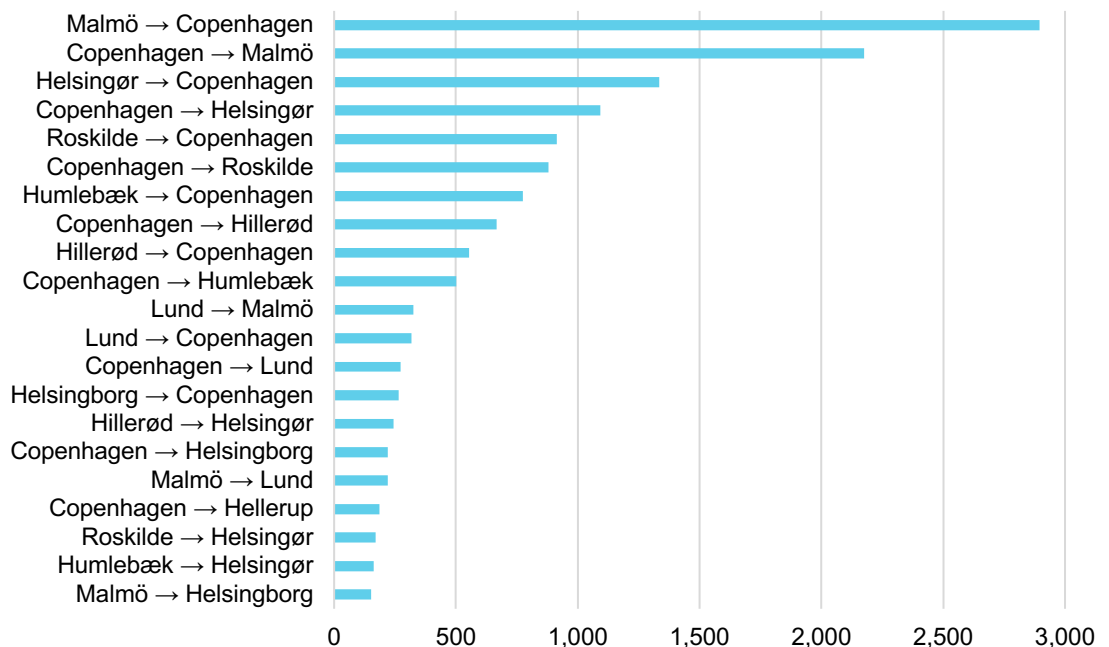


Figure 3. Major town-to-town links, with direction. (See figures 1 and 2 for less strong travel links.)

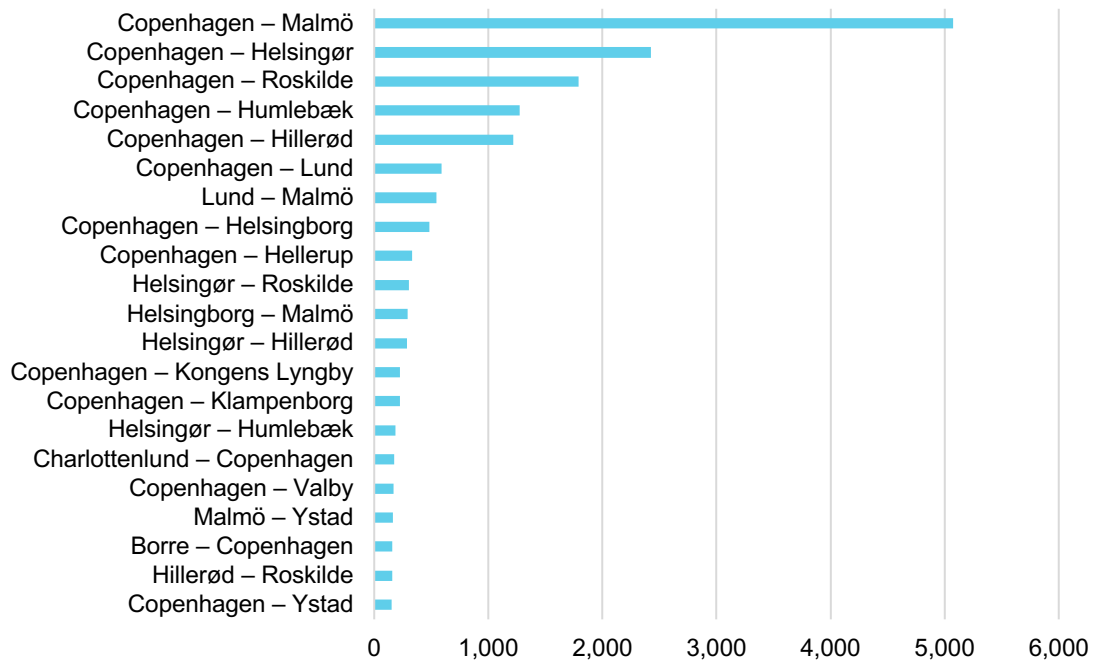


Figure 4. Major town-to-town links, without direction. (See figures 1 and 2 for less strong travel links.)

2.2 TOUR PATTERNS AND GATEWAY DESTINATIONS

Fig. 5 shows four clusters of locations that are tightly connected to each other in the travel patterns, by being typically included in the same trips. The visualisation is the outcome of a factor analysis on locations combined in one and the same trip. A factor score was generated for each resulting factor for each of the trips identified in the data. The four maps show the locations included in the trips with highest factor scores per factor.

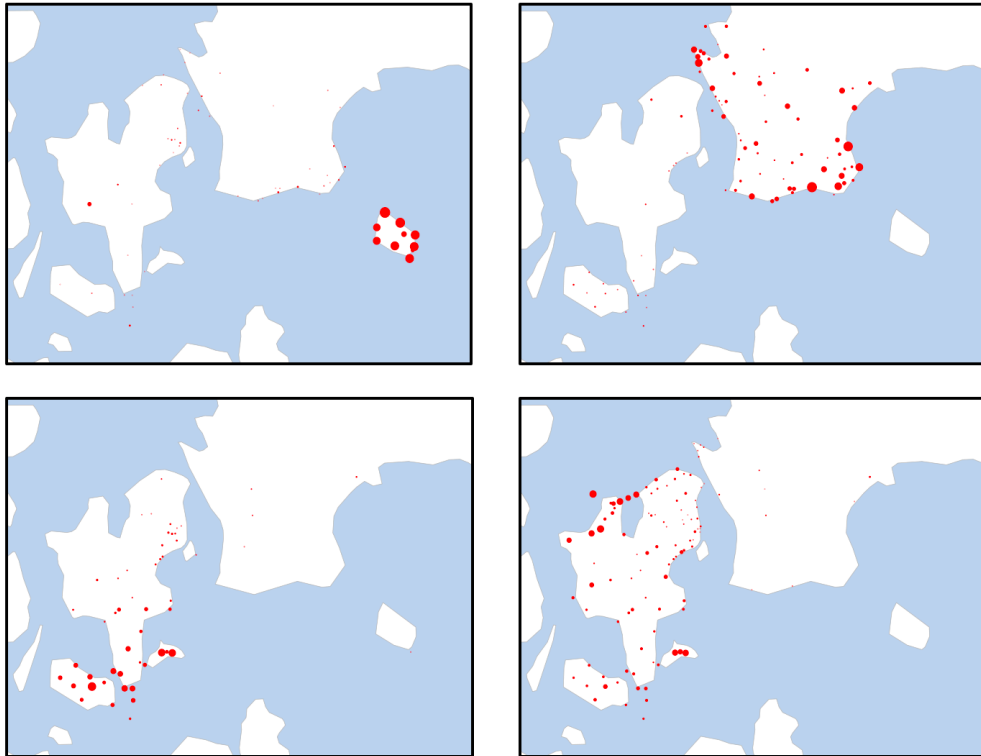


Figure 5. A factor analysis on locations visited during the same trips reveals four geographical areas that trips typically cover.

Copenhagen and Malmö are notably not represented in any of the factors, which can be explained by these cities forming part of a very large share of the analysed trips (rather than belonging to any travel niche).

‘Gateway’ destinations visited before and after the Greater Copenhagen area

The following two figures show which ‘gateway destinations’ are commonly visited before and after a route within the Greater Copenhagen area. They are the outcome of an analysis of a sample of 13,099 multi-destination trips to the Greater Copenhagen area, which were identified using additional reviews by the same travellers from attractions, hotels, and restaurants from around the world around the time of their reviews from Greater Copenhagen. In cases where travellers had posted reviews shortly before the first of their reviews in the Greater Copenhagen area, the location of the last such review preceding the reviews from the Greater Copenhagen area has been classified as ‘destination visited prior to Greater Copenhagen’. In the same way, in cases where travellers had posted reviews shortly after their last review from the Greater Copenhagen area, the location of the first such review has been classified as ‘destination visited after Greater Copenhagen’.

Of the 13,099 multi-destination trips, **51%** contain no destinations outside of the area. In **29%** of the trips, Greater Copenhagen is visited at the **end of the trip** – a significantly larger share than the **17%** of trips visiting Greater Copenhagen at the **beginning of a trip**.

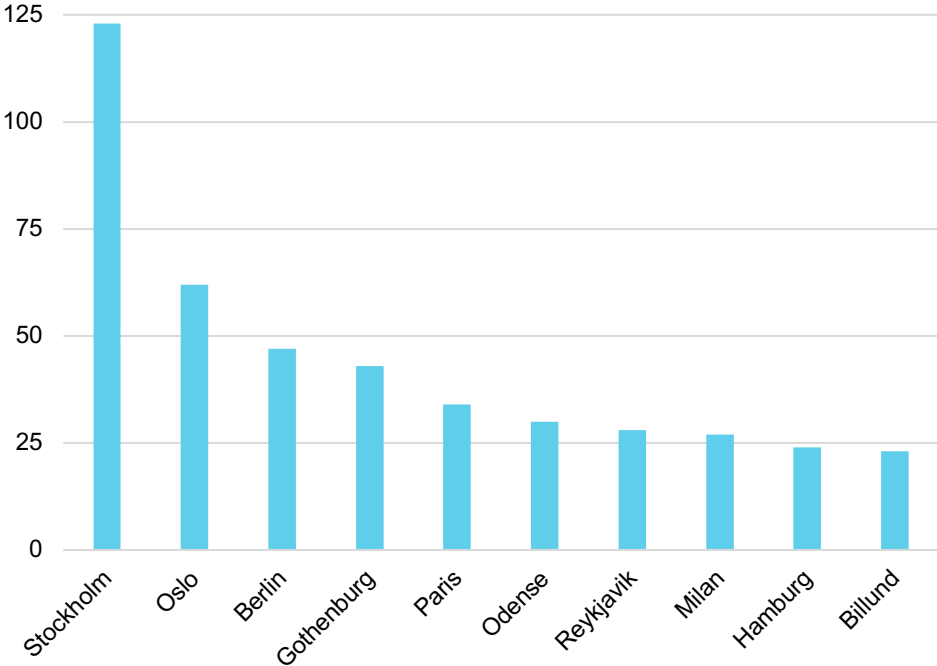


Figure 6. Destinations visited prior to Greater Copenhagen. Number of trips in which each destination immediately precedes Greater Copenhagen.

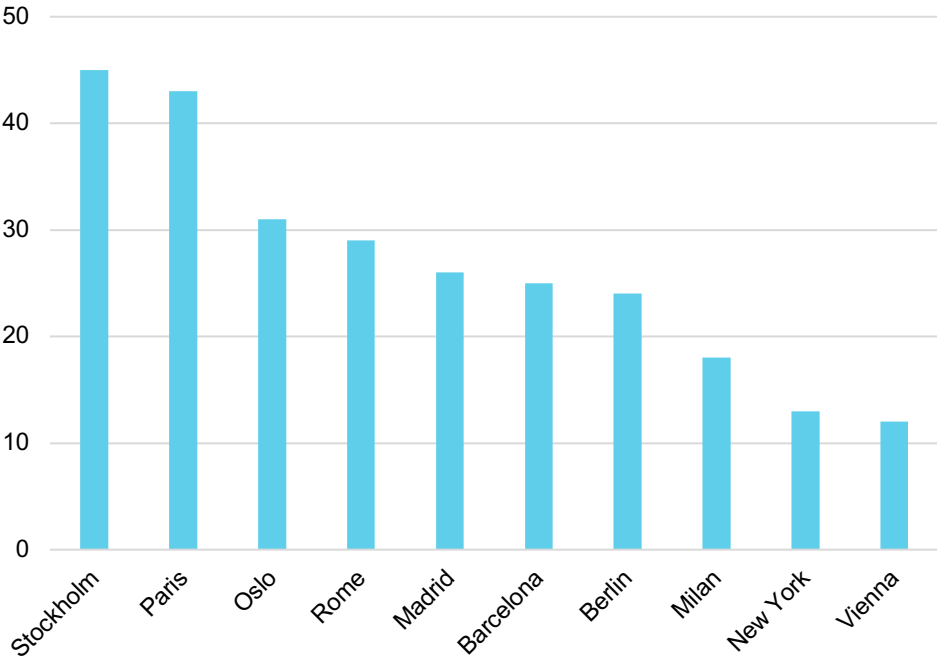


Figure 7. Destinations visited after Greater Copenhagen Area. Number of trips in which each destination immediately follows Greater Copenhagen.

3. DRIVERS AND MOTIVATIONS FOR MULTI-DESTINATION TRAVEL

An inconvenient truth – most travelers don’t have a clue

With the ethnographic interviews we reached a broader target group, also those who would never post a review online. Having talked to around 160 travellers during three seasons, our impression was that in general, the reasons for visiting were quite unclear to many travellers. It was not closely tied to any specific events or places or previous research. It was more common that the interviewees said things along the lines of “I’ve always wanted to visit X” than “his particular place in X is interesting because of reason Y”. This was particularly true for the ones whose main destination was Copenhagen and who took a day trip to Malmö or Helsingborg.

Instead, the visit was often about spontaneously “checking the boxes” that Google Maps or another digital platform had suggested.

Five pull factors identified

Despite the commonly spread, relaxed attitude described above, we did identify five important “pull factors” by identifying either things valued in the reviews or discovered important during the field interviews.

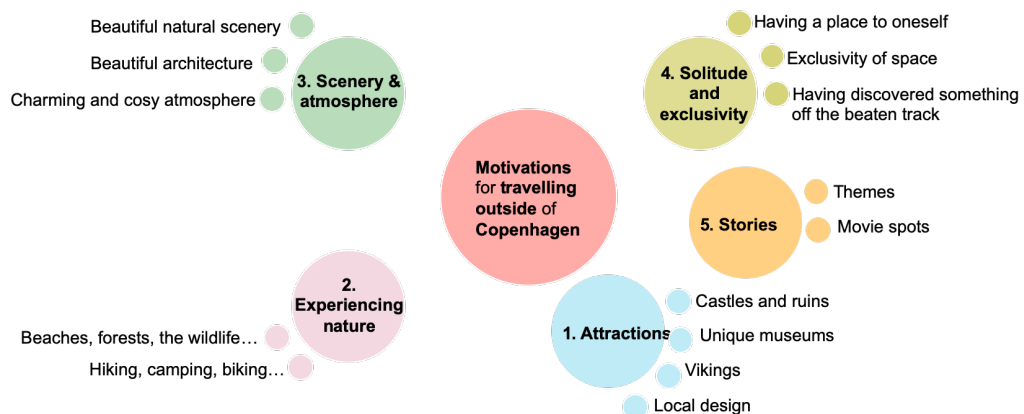


Figure 8. Pull factors for multi-destination travel identified through qualitative study of reviews & interviews.

1. **Attractions:** specific famous sights are a key force for drawing visitors to smaller towns and villages. Many attractions are already very famous, but travellers in many cases find a day-trip from Copenhagen enough to experience them. For making travellers stay longer on a smaller destination, several pull-factors need to be combined.

2. **Experiencing nature:** to go to the beach or get immersed in a forest, nature lovers need to get out of the cities for engaging in activities such as hiking or biking. Hardcore outdoor travellers are already choosing smaller destinations because of this, but smaller towns and villages can further leverage their natural surroundings by promoting the lighter nature experiences as part of what the destination is about.
3. The beautiful **natural scenery** and atmosphere around smaller locations attracts many travellers, as do picturesque villages and towns themselves. It's not only about how places look, though, but also about how they feel. Towns and villages are held forth for their charming and cosy atmosphere. The mix of wooden houses, cobbled streets, and ancient castles provide an exotic ambiance for many long-haul visitors, some of whom describe a fairy tale feeling. People reflected on how refreshing it was to get a break from the busy and crowded everyday lives, were it in relation to Hong Kong, Amsterdam, Teheran or Antwerpen, as a few examples.
4. **Exclusivity and solitude:** there seem to be a consensus, regardless of where people are from or where we meet them, that Scandinavia can offer a sense of peacefulness which is considered to be exclusive, luxurious. This was mainly mentioned in relation to what the best experience had been, and not as a driver for going in the first place. Which leads us to the fifth reason.
5. **Story telling** is a fifth important trigger to attract tourists outside the beaten tracks. The geo center at Møns Klint built a concept around the dark sky that can be a unique experience for anyone living in a "light polluted" city. In the same way quietness can be "packaged" in order to attract people being surrounded by "sound pollution" in their everyday life. Also, visiting places being used as scenery/setting for movies is a well-known trigger for increasing visitor numbers, particularly if there are tourism products built around them.

Reasons number four and five are not big reasons to go unless they are packaged in an attractive way.

3.3 INTEREST GROUPS

Another way of addressing the challenge of spreading tourism flows is by looking at different interest groups and their preferences.

This chapter shows how different interest groups cluster around different size tiers of destination as well as with aspect of seasonality.

Locations have been divided into different size 'tiers' based on number of visitors in the data. The 'soft adventure' group is overrepresented in smaller (less visited) locations, whereas the 'culture' group is more represented in larger locations. With decreasing size of destination, we get over representation of Soft Adventure, an interest group that also is strongly connected to the summer season.

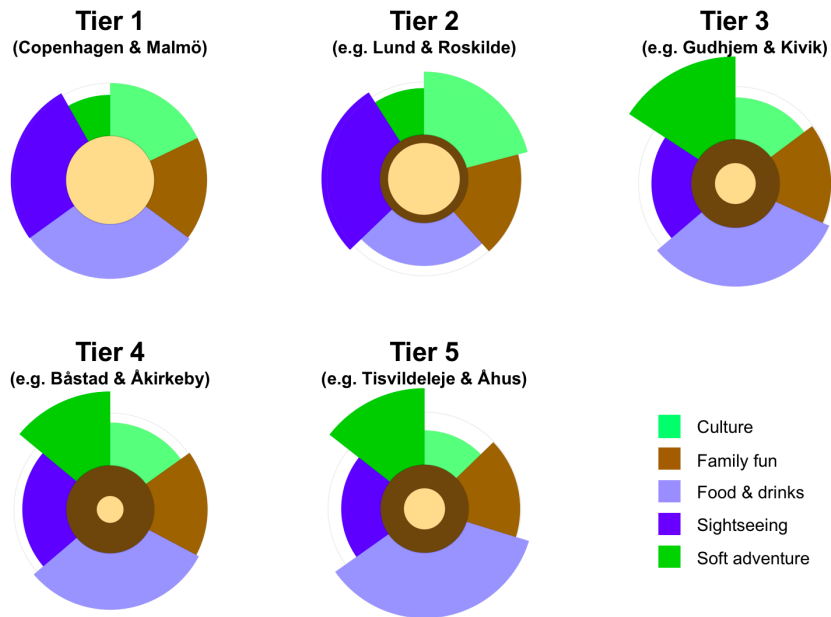


Figure 9. Locations have been divided into different size 'tiers' based on number of visitors in the data. The width of a 'rose petal' (slice) indicates the share that an interest group constitutes within a town tier, while the length shows to what degree the group is over- or underrepresented.

Looking at regions, the 'soft adventure' group is strongly overrepresented on Bornholm, and also overrepresented in Region Zealand. The 'culture' group is also overrepresented in Region Zealand, while the 'food & drinks' group is overrepresented in Skåne. More tendencies can be seen in the below figure.

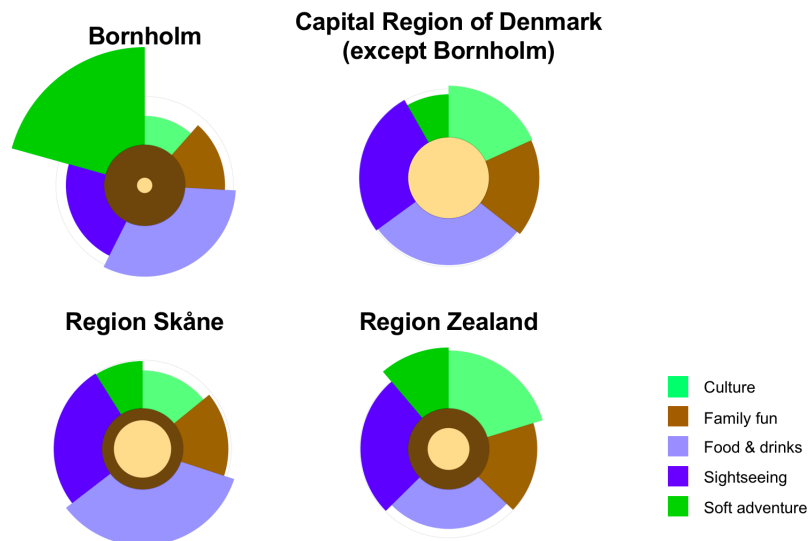


Figure 10. Comparison of how many travellers from each interest group has visited different regions.

The rose charts below show over- and underrepresented markets within each interest group. Norwegian market is e.g. a small market for culture, also in comparison to its size.

Norwegian market is bigger and also overrepresented when it comes to F&B and Soft adventure. UK is big in all categories except soft adventure.

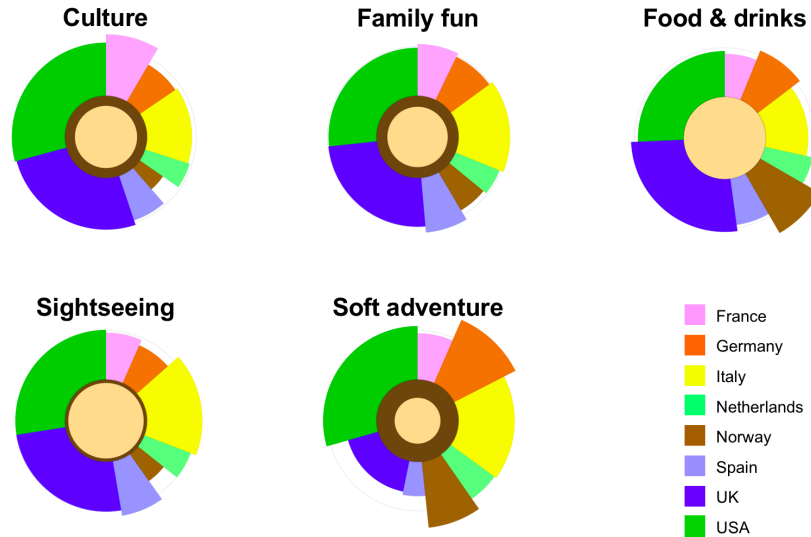


Figure 11. The below rose charts show over- and underrepresented markets within each interest group. Norwegian market is e.g. a small market for culture, also in comparison to its size. Norwegian market is bigger and also overrepresented when it comes to F&B and Soft adventure. UK is big in all categories except soft adventure.

All groups visit the Greater Copenhagen area most frequently during summer, but this is even more the case for the nature-oriented ‘soft adventure’ group. The ‘food & drinks’ and ‘culture’ groups are the ones with largest shares of trips during winter.

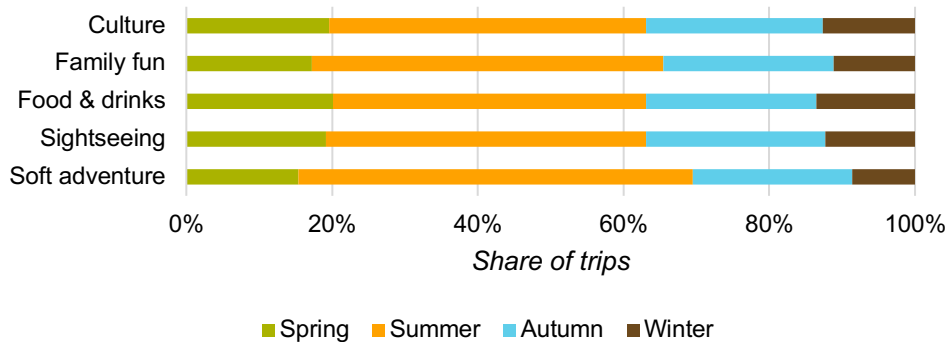


Figure 12. Trips have been classified into seasons based on the date of the first review. March-May: spring, June-August: summer, September-November: autumn, December-February: winter.

When it comes to multi-destination trips, travellers seeking soft adventure are the most active, whereas the food and drinks segment seem happy with few destinations.

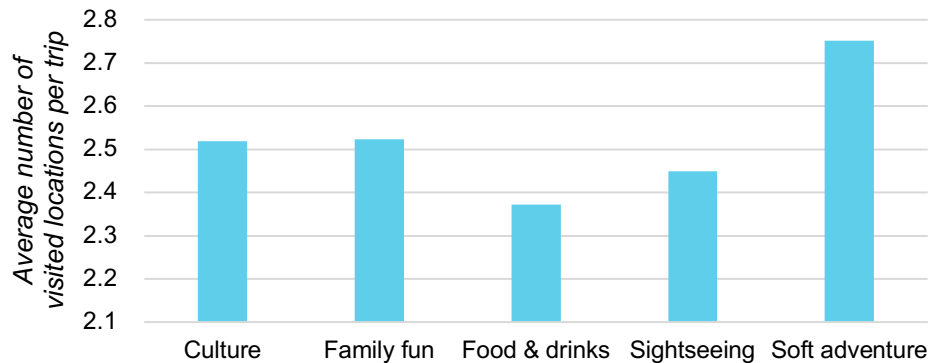


Figure 13. Average number of visited cities/towns/villages. The 'soft adventure' group, which typically visits smaller destinations, also visits the largest number of locations per trip on average.

The majority of trips stay on the Danish side of the boarder, however the 'food & drinks' group is an exception, with a slight majority of trips including Sweden and with the highest share of cross-border trips.

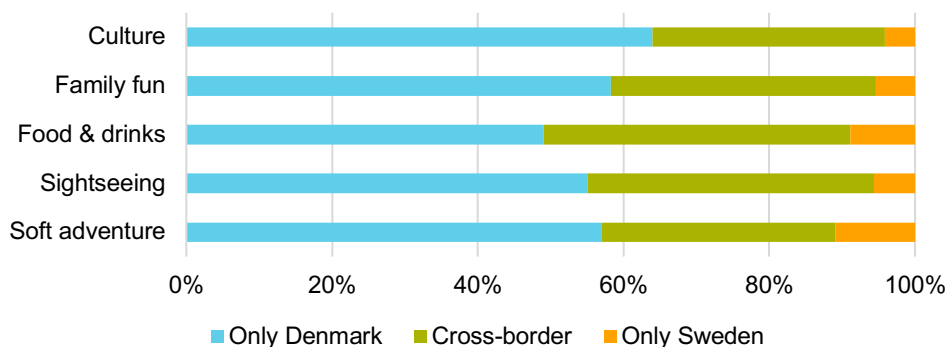


Figure 14. Shares of trips to each country and to both. The majority of the identified trips go only to Denmark.

3.4 MARKET DIFFERENCES

What differences can be found when comparing reviews from travellers from different markets? The word clouds show words that are overrepresented in reviews by travellers from different countries after reviews in other languages have been machine-translated to English. The more overrepresented a word is in reviews from a market, the larger it is displayed. The word clouds provide insights of two kinds:

- Insights about what topics and themes are particularly prominent in a market compared to in other markets.
- Insights about differences in tonality and the ways in which travellers express themselves when discussing attractions and destinations.

Observations of overrepresented phenomena on different markets include:

- aesthetics in France
- car-related in Germany
- price level in Italy
- camping in the Netherlands
- food in Norway
- some degree of scepticism in Spain
- ‘lovely’ ambience in the U.K.
- museums in the U.S.A.



Figure 15. Overrepresented words in reviews from different markets

In addition to these findings our field interviewers observed how origin affects travelling particularly with respect to frame of reference in these two aspects:

- **Geographical frame of reference.** Many long-distance travellers are inspired by mountains or northern lights. They have an optimistic understanding of geographical distance.

“Wanted to go to Scandinavia because we have heard there were mountains like the alps in Sweden, and I wanted to see it. It is different from South Africa.”
South African family staying 2 days in Copenhagen

- **Frame of reference for space.** During the ethnographic field study, Stenshuvud national park was visited to get more insight from nature tourism in the area. With Swedish perspective on nature and space, the area around Naturum and the beach in the national park was well visited. From around 10.00 and long into the afternoon the parking lot was more or less full, and a steady stream of visitors went up to the vantage points or down to the beach. Even so, several international tourists spoke of how nice it was to “get out in the real nature” or to “have nature for themselves”. Crowded seems to have a very individual definition.

4. INSPIRATION, BOOKING, GETTING AROUND

Digitalization has transformed information and booking for the tourism industry the past decade and the transformation is far from over. In this research project, we saw how behavior is being heavily governed by recommendations on platforms, mainly examples of planning taking place through real time interactions with Google. As we will see top lists and recommendations can have a big influence on trips, especially when little research and have been done in advance of arriving at the destination.

Google is king and people don't care what booking platform they really use

The majority of tourists interviewed booked their trip online. Usually from desktop computer or laptop. But there seems to be little loyalty to specific booking-sites. Instead, Google is used as a "site of all sites" in both researching and booking the trip.

Getting around

This behavior then stays during the actual trip. A common answer of how people found things to do was by using Google Maps and it's suggestions. When hungry "here and now", many consult Google Maps since it not only gives you suggestions and ratings – but also show you the way.

This is an example of how a behavior successfully is kept inside the one and same platform for much of the customers journey. The trust in the platform is high and it also provides convenience. Many respondents in the field interviews used Google as a proxy for all their interactions with their destinations.

Google is free to use, curated both by personalization-algorithms and co-created by other visitors. Very few used official websites for the short visits – day trips or weekends.

Taking a break from planning

Many visitors stated that they did not plan their trips out in detail or did much research in advance as an important aspect was spontaneity and getting away from a scheduled everyday life. This connects to the use of suggestions from Google, Pinterest or TripAdvisor by letting the pre-curated feeds of activities control were to stroll and what to see. The users of the digital platforms seemed to expect that the most relevant information would be accessible directly in the platform's app, not having to browse external websites.

For example, a Ukrainian couple was in Malmö and Copenhagen to "do tourist stuff" by which they specified as strolling around looking at Copenhagen and Malmoe. In March they had booked this trip as a nice way to celebrate spring and have something to look forward to. They stayed in Copenhagen in an apartment rented through AirBnB. They had not checked the weather in advance, but as they saw that it was good weather they took the train to Malmoe and used their phones to find things to do.

Spotted: Malmö as a part of Copenhagen

Ursula and Awadul from Germany came to Malmö as a spontaneous part of their visit to Copenhagen. They had arrived in Copenhagen with bus early and was going home in the night again. On the way to Copenhagen they had googled on their smartphone and a visit to Malmö came up as a suggestion on searching for “what to do in Copenhagen”.

As they had seen the city center of Copenhagen and found out that it was easy catching the train to Malmö they had done just so. They said that they loved that they had been able to walk around Copenhagen and when they got tired of that city center had another one within reach during the same day trip.

They stated “*we did not know before*” that Malmö was so close. Since they were heading home later this night to northern Germany, they had just a few hours in Malmö, so the activity of the trip consisted of buying “Swedish candy” at the supermarket at the central station and then taking a stroll to the city center.

Spotted: Møns Klint is a social media phenomenon

Møns Klint is a destination young people coming to Denmark often learn about through a contact at school or the workplace, or through social media networks. To this group, it is attractive because it is different from other experiences in Denmark and it is perfect for good Instagram pictures.

“We went because we had seen pictures on Instagram.”

/American exchange students from Copenhagen

The reason I wanted to go was to get a different perspective on Danish nature. It is usually flat and rainy and we had heard that there were cliffs here. It lived up to expectations. It was beautiful.

/Bulgarian couple living in Copenhagen

There are several types of pre-packaged trips

The field research showed, that in practical life there are now three types of pre-packaged trips

1. the packages of incoming agencies/DMC:s – the traditional way
2. the curated feeds of the travelling platforms, of which Google Maps seemed to gain importance significantly during the field period in 2019 with an improved interface,
3. influencer curated suggestions of things to do (see e.g. top lists on Pinterest, Instagram)

They exist both in a micro – in a city or town area, meso – in a whole city (see Pinterest) and macro level as a concept of complete trip.

The shift in power of influence goes from professionals/officials to friends and peers.

6. INSIGHTS AND CONCLUSIONS

WHAT TO DO

Within this study we have collected a truly vast amount of data with different methods. It is challenging to boil it down to a short summary, but here we make an attempt to list a few insights that we will develop on the following pages. Some of them are probably “old news” for experienced tourism professionals – still the conclusions hold true. Others might be controversial because they question e.g. the traditional ways of communicating with (potential) guests. Here is the list:

1. *Most important reason for not going outside Copenhagen/Malmö: ”did not think about it!”*

Most are not against: if they had known about it, they might have chosen a place outside of CPH/Malmö. Lacking awareness seems to be a greater problem than lacking attractiveness. Leads us to the evident conclusion that more effort needs to be invested in positioning the places you want to grow top of mind of the ones you want to reach.

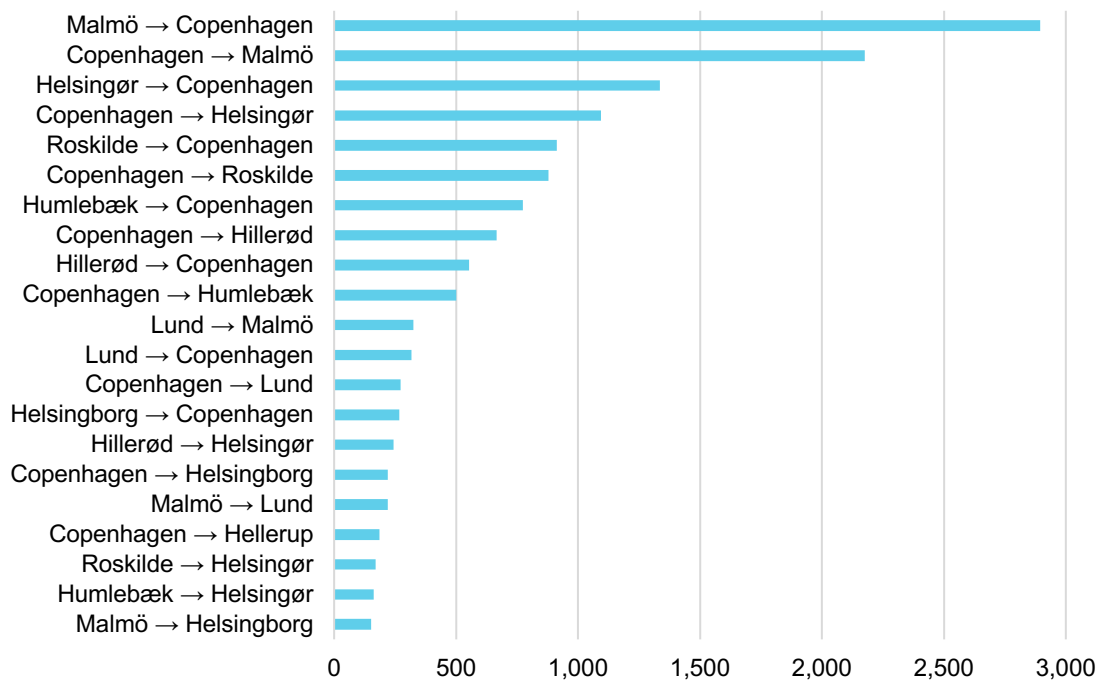
2. *Smaller and unknown places can be made part of the base*

For most travellers, the borders of Copenhagen were unclear. As long as it is convenient to get places, it is not important where the city boundaries are, and Malmö was considered a Copenhagen excursion by several. This concept is already introduced at the website VisitCopenhagen.com, and in the example of Amsterdam but can be further developed. To put it simple; in order to introduce travelers to a new concept/place, it is important to include the WORD Copenhagen in the name of the concept, in order to be found by people planning on Google (most).

- Example: city marketing officials in Amsterdam decided to promote Muider slot castle as belonging to Amsterdam and the resort of Zandvoort as Amsterdam beach. They have started a campaign to spread tourists out of the city centre and show them there is more to see in Amsterdam than the Dam, the red light district and Anne Frank’s house.

3. *Take inspiration from existing town-to-town links*

It is usually wise to start digging where one stand, and the ethnographic analysis showed what connections are already popular. Focusing on connections leading away from Copenhagen; Lund-Malmö, Copenhagen-Lund, Hillerød-Helsingør, Malmö-Lund, Roskilde-Helsingør and Malmö-Helsingborg seem to be worth taking a closer look at for further development.



4. *In a time when time and energy are the scarce resources, packages are as hot as ever*

Google is taking over a lot of the packaging work. But still desired are packages that makes it easy for the traveller to know they get the most out of their prerequisites.

- 30 minutes are best spent this way if you are interested in X!
- If you have half a day; add Y!
- Best places to go for day hikes!

In this way you offer something valuable for the traveller – time – and a feeling of security that this will be a well thought through concept. In order to increase value; include a guide or an audio guide version. That helps the concept come alive and may also provide a way of collecting valuable data on behaviour!

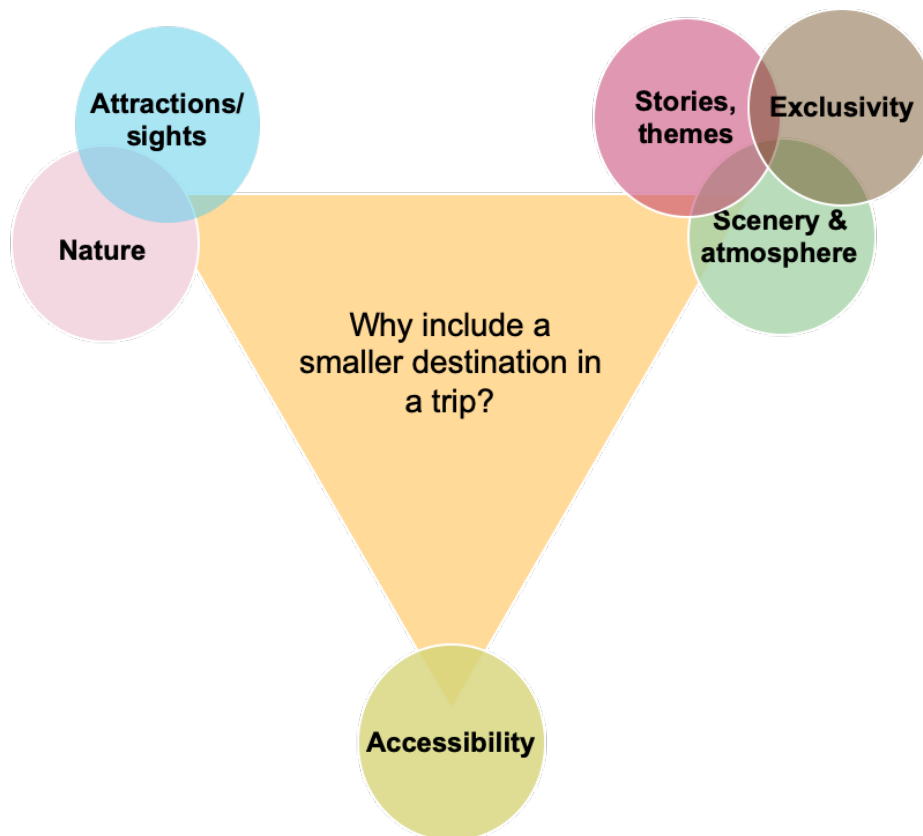
5. *All pull factors need to play together*

The pull factors listed earlier are all motivations for including smaller destinations in a Greater Copenhagen trip:

- **Sights and nature** attract travellers to smaller destinations to see or do *something specific* that they need to travel there for.
- **Scenery and atmosphere** add an attractive feeling that many refer to.
- The **exclusivity** of having a place to one's own /not having to share with many is the best of all for some. Off-season equals shitty weather for some, but exclusivity and quietness for others. Emphasize the advantages of a more peaceful time for the year. The exclusiveness of Österlen or Möns klint in early spring and fall was mentioned as a reason to travel by several travellers!

- **Stories** and packages make smaller places visible for travellers – helps them see the red thread...
- **Accessibility** is a deal-breaker for many travellers.

In order to attract more travellers to venture outside of Copenhagen (and Malmö), stress the combination of these factors, for example by highlighting the romantic ambience around a museum or the convenient public transport to a scenic natural area or build a story around e.g. food, fauna, famous people's trips etc.



Additional attractants to hold forth on top of the main pull actors include:

- **Cultural events**
- **Soft adventure activities**
- **Food & drinks**
- **Activities for the whole family**
- **Accommodation for different tastes**

6. *Building routes through thematic storytelling is still a winner*

It might sound like old news, but true nevertheless. In order to make less known places attractive to travellers storytelling is an important tool. Find a theme and connect the dots! More attractive and known dots can be combined with places of less prominence if they contribute to an overall story.

- Amsterdam is using billboards, a multilingual website and special promotional booklets to persuade visitors to visit 11 of the city's boroughs outside the center.

'We were very focused on finding the different characters of Amsterdam's neighbourhoods,' said Nico Mulder, consumer marketing manager at Amsterdam Marketing. 'So, we travelled the city by bike and went to talk with residents and business owners about their neighbourhoods.'

Read more at DutchNews.nl:

7. *It is all about naming and framing!*

Several travel professionals witness about cases where a catchy title makes the difference between a moderately successful package and a best seller. It is perhaps not *all* about naming and framing, but this is incredibly important! Today, this responsibility often lays with the incoming operators and tour companies as there are so many players involved in concepts like this. An intensification of systematic trend driven concept innovation involving more tourism players (and e.g. influencers to talk about it) could take this one step further. Successful examples

- Dark sky / Møns Klint
- Nordic lights / Lapland
- Hunting the light / Hurtigruten.

8. *F&B trips is an interesting option for prolonging the season and reaching across borders*

Among those trips reviewed, the Food & Beverage trips were the ones most spread out over the year. Also when thinking cross-border. The majority of the identified trips go only to Denmark. The 'food & drinks' group is an exception, with a slight majority of trips including Sweden and with the highest share of cross-border trips.

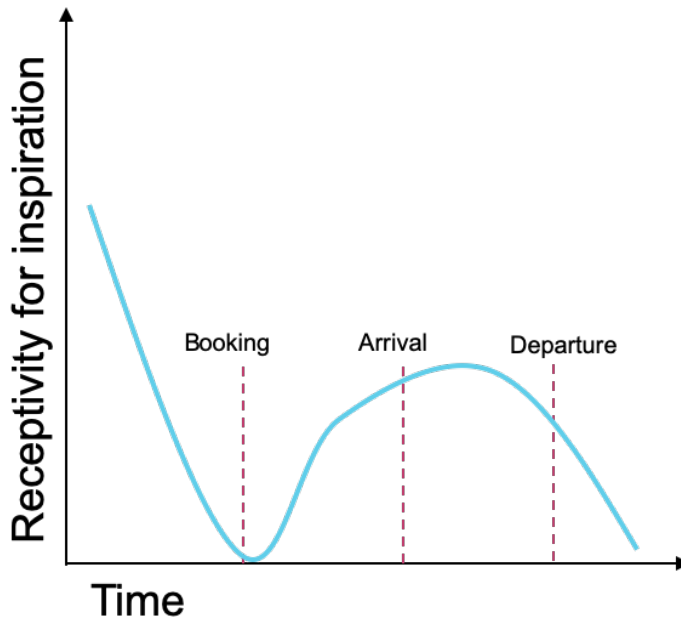
9. *Soft adventure is best option for a large number of small destinations*

Good for co-operation projects between several destinations/places/players: soft adventure. The 'soft adventure' group, which typically visits smaller destinations, also visits the largest number of locations.

10. *Several windows of opportunity for inspirations before, in the beginning of and at the end of a trip*

Many visitors come without a full agenda and with a desire to be spontaneous, which means it is easy for them to resort to the highest rated recommendations on search engines or apps. There are several opportunities to reach out with alternative inspiration. Before the trip of course, with suggestions for routes off the beaten track, promising top experiences, fitting to their "tribe" or special interest group. If not possible, there is still a window of opportunity upon arrival, at least for the

spontaneous (most). And then there is an opportunity to plant seeds at the end of the stay, for a second visit. Tourism professionals report on successful cooperations with hotels that could be extended. –We could do sooo much more! several say.



11. The challenge: getting inside the boxes

Many visitors did not have a clear plan or goal with their visit. They seemed to be “checking the boxes” based on Google, Pinterest or Tripadvisor suggestions. With an improved Google interface this is of growing importance for decision making!

So: find a way to get into those boxes! E.g. by working proactively with micro influencers (number of reviews is more important than number of followers in this regard).

Widening the scope of the Copenhagen card to a Greater Copenhagen Card would also point the visitors in this direction.

12. Still a classic: work with events, congresses, tech visits etc.

Events and business related pre- and post tours, tech visits etc.: an evident classic approach to prolonging the season. Both big and small. Here a lot has happened in the Greater Copenhagen Area the past 10 years tourism experts say but there is still a lot to explore and develop.

FACING THE CHALLENGE OF MULTI-SEASONALITY AND MULTI-DESTINATION TRAVEL

Spreading out visits over the season and to new destinations is neither a small nor easy task – but in this report we have tried to highlight some useful old classic strategies that are still going strong, and some new insights that will hopefully give new inspiration to destination developers. For tourism professionals with long experience in the field, and for newbies in the field, the challenge of getting into the increasingly dominating Google selection will be a major task ahead!

METHODOLOGY

Methodology nethnographic study

- 390,252 reviews of attractions, hotels, and restaurants in the Greater Copenhagen area were collected from online review sites.
- Reviews posted by people from Denmark and Sweden were removed from the data.
- Reviews posted shortly after one another by the same reviewer were identified as belonging to the same trip. 13,572 inbound trips were identified in this way.
- The itinerary of each trip was assessed based on the order of locations that a traveller has posted reviews from. The location of a reviewed attraction/hotel/restaurant was determined by its address listed on the review site. For example, reviews from Malmö Airport have been classified as ‘Malmö’.
- The season of a trip was determined based on the date of its first review.
- The frequency of each link from one location to a second location in the 13,572 trips was counted to assess what the travel flows look like on an aggregated level.
- Note: we do not have information about locations that travellers have visited but not posted reviews from. For example, if a traveller has travelled along the route Helsingør–Ystad–Rønne, but only posted reviews from Helsingør and from Rønne, this route will appear in the data as a direct link from Helsingør to Rønne.
- The assessed travel flows were visualised as two kinds of networks (figures 1-2) and two bar charts (figures 3-4).
- Additional reviews from the travellers were collected from the time around the identified trips to identify which locations outside of the Greater Copenhagen area are the most common ‘gateway destinations’ that travellers visit before and after visiting Greater Copenhagen. (Figures 6-7.)
- A separate network analysis was conducted using Google search statistics for phrases of the kind ‘Malmö to Copenhagen’.
- A factor analysis of which locations are included in the same trips was conducted, revealing four geographical tour patterns. (Figure 5.)
- Reviews written in other languages were machine-translated to English.
- Five interest groups were identified among the travellers in the data through mapping topics frequently mentioned in reviews by the same travellers. The

profile of each group was analysed along a number of dimensions including visited destinations, seasonality, and source markets. (Figures 9-14.)

- Topics in review texts were studied qualitatively, with special attention to what pull factors for visiting locations and attractions outside of Copenhagen travellers refer to.

Methodology ethnographic interviews

The study used interviewers trained in ethnographic interview technique as this includes a more holistic approach to the interview situation and gives richer results. An ethnographically skilled interviewer takes notes not only on the answers of the interviewed person, but also follows up on reactions, symbols, behavior etc. and works with thematic question areas discussed over e.g. a cup of tea. The relaxed atmosphere usually gives richer results than regular interviewers following a set questionnaire.

Purpose: To give a deeper insight into aspects of travelling not covered clearly in the ethnographic research.

160 Interviews were conducted during May, July/August and October 2019 on the following places: Copenhagen, Malmö, Helsingborg, Simrishamn/Österlen area, Hillerød, Møns Klint. Locations were chosen in dialogue between Wonderul Copenhagen, Visit Skåne & Kairos Future. The aim was to evenly distribute the interviews over each site and season approximating 10 at each place and season. During off-season (spring and fall) recruitment of a full quota in rural locations was not always possible inside the time budget and then was compensated with observations and extra interviews in urban settings and during high season.

Researchers used spontaneous recruitment at the destinations governed by the following screening:

- Only: international leisure travelers, traveling to and staying in places outside their usual environment (not Swedes or Danes, not business travelers – unless they are adding a leisure trip to their business trip).
- Ambition to find a mixture of ages and nationalities and those on a multideestination trip/positive to do one and those who are only there for the one city/place. No strict quota.

The interviews were conducted using semi-structured interview methods with a questionnaire spanning over different areas such as travelling patterns, best experiences and holiday stories as backbone.

During the fieldwork the researchers also gathered data using ethnographic observation techniques. This includes conversations outside of the interview scope with other visitors, locals and staffs.

Methodology expert interviews

In addition to the ethnographic interviews, several expert interviews with researchers and travel professionals were carried out. Here, we used a semi-structured questionnaire and asked them to mention examples and best practice, elaborate on reasons to choose less known destinations, what would be needed in order to develop tourism off the beaten paths etc.

ABOUT KAIROS FUTURE

Kairos Future is an international consulting and research company that helps companies and business leaders to understand and shape their futures. We work as consultants for strategic futures, providing our clients with trend analysis and scenario planning, strategy and innovation, strategic change and capability development. The company was founded in 1993, has its head office in Stockholm and representatives as well as partners around the globe.

For more information, please visit our website www.kairosfuture.com

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