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Experience design in city tourism

- How tourists design their experiences before, during and after their holidays in 14 Nordic and Baltic cities

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Abstract:
'Experience design in city tourism' has gathered 14 city tourism organisations from most of the larger cities in the Nordic region.
The project aims at gaining knowledge about the experiences that tourists have, want and remember in the cities. By doing so, the objective is to improve the experiences that are supplied and demanded in the cities.
To reach the objective a series of different analysis elements have been conducted.
As a starting point, experience design as a concept was investigated by a research team, which led to the development of the framework of the project.
In August 2007, a large comparative interview study of more than 5.000 tourists was conducted. The study focused upon gathering as much relevant information about the tourists as possible, e.g. inspiration sources, reasons to go, motivations to experience, specific activities, image of the city etc. as well as background variables such as age, travel group and gender. This study has given the possibility to benchmark 14 cities in many different aspects and gives each city a unique possibility to analyse its strengths and weaknesses.
A large amount of desk research has been conducted to get the full picture of experience design in city tourism. Hence, social media websites such as tripadvisor.com and flickr.com have been analysed in terms of how the cities are presented and perceived. The official websites have been analysed to see how they perform. And best cases of experience design have been analysed to find benchmark cases.

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Executive summary: Objectives

Main objectives

The overall objective of the project is, in a short-term perspective, to gain knowledge on how the experiences that the tourists want, have and remember in 14 Nordic cities are designed by the tourists themselves as well as by the traditional producers of tourist experiences, i.e. tourism organisations and companies.

The long-term objective is to make it possible for the tourist organisations and companies to design experiences that fit the motivations, attitudes and interest of the tourists.

Within the project period itself, the aims have been:

•To investigate how the concept of experience design can be used within tourism, both in terms of understanding the tourist experience itself and in terms of understanding how producers within the tourism and experience economy can design experiences for their consumers.

•To carry out a large-scale comparative study of how tourists experience the cities to be able to benchmark the tourists' experiences as well as to carry out a benchmark study of how the cities perform in designing and delivering first-class tourism experiences.

•To investigate and learn from new forms of tourist communication and experience design within social media websites as well as how official tourism websites are used and perform.

•To map some of the most innovative examples of existing cases of experience design in the 14 cities.

Overall, the project has met its overall short- and long-term objectives through different analysis elements.

The concept of experience design has been investigated in a scientific essay written by a research team under supervision from Wonderful Copenhagen. The essay has worked as a framework for developing the analysis elements of the project. Moreover, the essay itself has been presented at "The 16th Nordic Symposium in Tourism and Hospitality Research" in Helsingborg in September 2007 and will be published as a scientific article titled "A Dynamic Framework of Tourist Experiences: Space-Time and Performances in the Experience Economy" in "Scandinavian Journal of Hospitality and Tourism" (volume 2, 2008).

In August 2007, more than 5.000 tourists completed a questionnaire during their visit to one of the 14 Nordic or Baltic cities. In October 2007, half the tourists completed the second part of the questionnaire. The results from this large-scale quantitative survey give content to the main part of the report and investigate how, what and why tourists experience in the 14 cities.

Other objectives have been met by thorough desk research. Since the amount of examples, information and data in the official websites and social media is enormous, the study and the results are not exhaustive but work as inspiration for further analysis. The case studies have been limited to fewer examples than originally planned since it was hard to get in contact with the entrepreneurs behind the more innovative tourist experiences.

Executive summary: Methods

Methods

The project has used different methods to meet the projects' objectives.

Basic research

Since the concept of experience design is rather new to tourism, a research team did basic research and thereby conceptualised experience design and investigated tourists' experiences on a conceptual level.

Field research

A total of 5.040 tourists filled in questionnaires in the tourist information centres in the 14 cities on portable computers (the number of tourists in each city ranged from app. 200-600 interviews based on the city's size). To follow up, the tourists were contacted after the holiday and asked to fill a second part of the questionnaire. Catinét A/S was responsible for data collection in the cities as well as electronically afterwards while Wonderful Copenhagen has developed the questionnaire, the project setup and analysed all results.

Desk research

Other than basic research and the quantitative study, the rest of the project's results have been found through desk research conducted by Wonderful Copenhagen. Hence, an extensive analysis of websites, social media and innovative tourist products has been done through online resources with inspiration from different studies, models and theories already developed.

Executive summary: Main results

Main results

Since the project contains several elements of analysis , the main results presented here is divided into the main elements of the project.

Experience design as a concept

Investigating experience design as a concept gave the suggestion that experiences should be analysed and designed in relation to what degree they are controlled (or uncontrolled) by the tourism organisations and companies and to what extent the tourists are passively entertained or actively exploring. Moreover, tourist experiences should be analysed in terms of three phases (before, during and after the holiday experience itself), revealing the anticipations, actual “performative doings” and satisfaction with and memories of the holiday and the city.

Fields research results

Some of the main results apply in general to all 14 cities. Some of these are listed below.

All cities

The tourists’ reasons and motivations are complex, multifaceted and sometimes apparently self-contradictory. E.g. even though the tourists we interviewed have consulted the tourist information and four out of ten want to go on an organised sightseeing tour, the main part of them see themselves as explorative, self-deciding and experience designing travellers rather than passive, entertainment-seeking on-the-beaten path tourists.

Tourist organisations have a rather small say in persuading the tourists in their travelling decisions. When it comes to choosing where to go, tourists are much more inspired by personal recommendations and general information than on the official tourism websites, tourism brochures, ads and the like.

The Nordic and Baltic cities are mainly perceived through classical attributes such as their atmosphere, architecture and history. Tourists’ reasons to go are of course many-fold but it seems that more contemporary reasons like shopping, eating & drinking, going to events and night life are less popular than the cities more traditional values. Moreover, most of the cities are perceived as more historical and charming than modern and rich on events.

The tourists are motivated to do all sort of things – from getting to know more about the city’s history to going to the city’s underground environment. However, a statistical analysis resulted in four overall motivational segments with four more or less specific motivations; the party segment (34% of all tourists), the relax segment (28%), the modern segment (22%) and the history segment (16%). These psychographic segments have different demographic profiles, do different things, decide in different ways etc. In general, the tourists are very satisfied with their holiday. While elements such as the city itself, the sights they visited and weather score highest, while the accommodation, the restaurants and the shops they visited score much lower in terms of satisfaction.

The experiences the tourists have are better than they expected, especially when it comes to experiencing the city’s atmosphere, the history of the city and also the modern, new and different places in the city. The cities do not perform as well when it comes to experiencing the night life, meeting locals and having a low cost of stay.

Executive summary: Main results

Benchmarking the cities

While the cities are ranked very differently from question to question, the overall conclusions to be made on city level are:

First and foremost, many of the results in the above section apply to all cities. Hence, in a lot of respects the Nordic and Baltic cities resemble each other, also more than hypothesised. Even though the answers of course vary from city to city, there are few major differences to be found between smaller and larger cities.

The three Baltic capitals, Tallinn, Riga and Vilnius, alongside with Uppsala perform very well on many parameters, especially in terms of having a large share of tourists interested in history and architecture.

Helsinki and Copenhagen top the rankings in terms of appealing to tourists that want to see new, modern and different places as well as go to trendy in-places.

Aarhus, Malmo and Tampere have a higher share of tourists motivated for shopping than the average city.

Stockholm is the city that most of all the tourists considered as alternative destination when choosing where to go, closely followed by Copenhagen and Helsinki.

Desk research

The project has conducted a vast amount of desk research, regarding different topics.

Social media

Social media websites (such as tripadvisor.com, virtualtourist.com. flickr.com etc.) are on the lips of the entire tourism industry. While many look at this phenomenon as an unexploited communication channel, this project, however, also used it as an unexploited area for analysis and the following results came up.

Flickr

Searching on the city names on flickr.com give a basic idea of the city’s presence in a social media photo sharing site. Stockholm is in front with more than 400.000 photos tagged with Stockholm in flickr.com, compared to less popular city tags as number two Copenhagen (app. 351.000) and last place Turku (app. 28.000).

Flickr.com can be used to discover what places, sights, atmosphere etc. the locals and the tourists photograph and decide to upload. Trying to connect the photos on flickr.com to the psychographic segments, the majority of the photos found can be associated with the party segment (keywords party, shopping & café). The party photos are particularly popular in Uppsala (most likely because of a large share of students), Malmo and Riga. The history segment (keywords typical, historical & museum) are the second most popular segment, particularly used in the cities Turku, Oslo and Tallinn.

Executive summary: Main results

TripAdvisor & VirtualTourist

The tourists in our quantitative study are probably more traditional tourists than most tourists today (the majority do not frequent the tourist information centre). Still, some of the tourists do use social media, blogs or similar as inspirations to go. These sites reflect the communication of and to the modern consumer such as two-way dialogue, personal recommendations etc. – something that most official tourist websites neglect.

The tourists ask about many practical issues in the social media, even though many of these answers could be found in official websites, brochures etc. Hence, a large number of tourists would rather consult other tourists or locals than tourism organisations.

The social media can be used to evaluate the city tourism organisations knowledge and tourist information, e.g. by benchmarking the tourist organisations top attractions with the lists found in social media websites. A general conclusion is that many of the cities are more or less wrong about the popularity of certain sights and attractions in their city.

Official websites

Looking at the official websites, there are some general remarks.

Only Oslo, Copenhagen (both have started a tips and review section) and Stockholm (blogging with tourists) have started up doing two-way communication with the tourists. Most dominantly, the official websites are packed with information, tips, good ideas etc. – but everything written and designed by the tourist organisations. Many of the websites include hotel booking and selling city cards – but few include videos or photo slideshows to give an image of the city.

Cases

The tourist organisations assisted in finding some prominent examples of innovative tourism experiences, where the tourists play a more or less active part in the experience (co-designing). The cases vary from very explorative to more entertaining, represent different kinds of innovation from technological innovation to architectural innovation, and can be placed within four different experience themes.

Overall, the tourist experience cases signal a paradigm shift in terms of giving the tourists a feeling of the experience as co-designers rather than just receiving a ready-made product.

The people behind these experiences are very different, but can be characterised as entrepreneurs, artistic in their own sense and very focused on the tourists' or other consumers' experiences – instead of their own experience.

Executive summary: Use of results

Use of results

The results have already been presented on several occasions within the tourism industry, with great success and interest. Generally speaking, the results highlighted above can be seen as important and utilisable in relation to three different target groups.

Tourism industry

Self-evident, the results and the project are of great use for the 14 involved tourism organisations, in their effort to promote and market their destinations to create growth. The results give the cities the possibility to focus their effort, improve marketing, improve and develop tourist experiences, inspire local organisations etc.

Most of the use of the report will take place after the project has ended. Wonderful Copenhagen will work as a partner in developing seminars, giving presentations etc. Moreover, the results are of interest to the tourism industry in other cities and countries and will be presented on relevant international conferences within tourism (most recently European Cities Marketing conference in Belgrade).

Scientific community

The essay on experience design has been presented at a scientific conference and will be published in a scientific journal. Moreover, the results will be presented on several occasions for different study programs within tourism, experience economy, social anthropology, ethnology etc. The scientific community has been very positive about the basic research on experience design.

Media and press

The study with comparable results gives all cities unique possibilities in local press coverage. Focusing on each city's strengths and weaknesses compared to the best and largest cities across the Nordic region can gain a lot of press coverage (for example see appendix 3). Wonderful Copenhagen will assist the cities in getting press coverage in the months after the report has been published.

Executive summary: Recommendations

Recommendations

'Experience design in city tourism' has produced knowledge and inspiration for future work and research within tourism, experience economy and experience design.

Design experiences that allow interaction

The project's focus on experience design, in terms of analysing the tourists, the social media as well as the cases through this perspective, has revealed a demand for developing and communicating tourist experiences that have a local touch, allowing interaction and active involvement.

Tourists see themselves as unlike any other tourist. They want to do what locals do. They want to explore off-the-beaten-path activities. But still they want to know more about the city and its history, see the most famous attractions, do shopping and other activities that tourists have always done.

The tourism products – be it concrete experiences, guided tours, websites, tips, and even brochures – that effectively combines these two somewhat self-contradictory demands of many contemporary tourists will be likely to gain success, at least in terms of satisfying the tourists.

Renew research, development and marketing

A somehow related recommendation as the one mentioned above goes for the tourism organisations and tourism industry. Many of the cities involved would benefit from a general evaluation of the current research of tourists (e.g. traditional visitor surveys), development of tourist experiences, information and communication (e.g. how the websites communicate to the tourists), and marketing (e.g. revitalising target segments. The psychographic segments mentioned above could be possible target segments for the Nordic cities in the future, updating and/or replacing more traditional target segments based on demographics.

More generally speaking, the tourism organisations and tourism industry should invest in research, make results comparable to give the possibility to benchmark and make analysis publicly available to a broad audience. This is of absolute importance in terms of giving the Nordic countries and cities a competitive advantage and strengthening the whole industry.

Get closer to the tourists

The project has discovered many interesting aspects concerning the behaviour of tourists, who they are, what their motivations are, how they want to experience the cities etc. But at the same time, the project has shortcomings when it comes to explaining the tourists' behaviour and motivation at a deeper level. E.g., we know what their motivations are but we do not know the concrete activities they do to satisfy these motivations. We know many specific activities that the tourists do, but we do not know how they prioritise between different options and value experiences.

Therefore, the project recommends to do further research on tourists based on more qualitative methods. To be able to use the knowledge more directly in terms of developing tourism products, there is a need for an even more user-centred approach in future research. The research should be based on the results of this project to give a deeper understanding of the experience design done by tourists as well as tourism organisations and companies.

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Executive summary: Recommendations

Repeat the survey

The results of the project at hand are of absolute importance to the cities and give valuable inputs to future development and strategies.

But the project only gives a snapshot of how the cities perform today. It could be interesting to repeat the survey in one or two years to see how the cities have been able to develop their positions on different parameters.

Moreover, it would be interesting to do the survey with cities from other regions in Europe to be able to compare the Nordic results with our colleagues and competitors from the whole of Europe.

Locals' experience design

Since many tourists are interested in meeting locals and even more in doing and experiencing the city like locals do, it could be relevant to study experience design among the locals in the Nordic cities.

Doing this would make it possible to promote true local experiences, in an updated fashion, and include the local experience as a selling point for the cities.

Content

Experience design as a concept written by Richard Ek, Jonas Larsen, Soren Buhl Hornskov & Ole Kjaer Mansfeldt

Social media as a concept written by Christian Korsager & Thomas Christensen (translated by Marie Wiuff Kruse)

Cases written by Malin Gardeström

Introduction

S. 1

Preface

Cities all over the world are facing strong international competition in terms of attracting tourists.

Most of the Nordic cities are not ranked in the premier league of cities neither in the world, nor in Europe in terms of number of tourists. This fact makes it even more important for the Nordic cities to deliver and supply world class experiences to and with the tourists that actually visit the cities.

To excel in this area the cities need to get to know their tourists and how they behave, think, plan, act, do and remember before, during and after their holiday. All the different elements in this report investigates this and therefore represents a unique effort to strengthen the cities' performance in the field of experience design.

'Experience design in city tourism' is in two ways a unique project within Nordic Innovation Centres ambitious focus on Creative Industries.

Firstly, 'Experience design in city tourism' of course links to the design theme within the Creative Industries focus area – but it does so in an innovative way using the concept of 'experience design'. Experience design is used as a term to describe the way in which producers and (even more important) consumers design experiences within the experience economy in general and city tourism in particular. The design of experiences is in many ways different from e.g. product design, especially because the production - and consumption process of the experience takes place at the same time and is constantly redefined to fit the users needs. The project set out to investigate the way in which tourists as well as the producers (tourism organisations and companies) all contribute to the co-design of experiences in the Nordic cities.

Secondly, the project counts as many as 14 project participants from all eight countries in the Nordic and Baltic region. The participants count 14 of the largest cities in the region, in this project represented by the city tourism organisations. Even though these 14 cities normally compete strongly for attracting leisure as well as business tourists, this project has successfully built on already existing networks to strengthen cooperation through a completely comparative study on several levels.

As initiator of the project, Wonderful Copenhagen would like to thank Nordic Innovation Centre for seeing the potential in the theme of experience design, a rather new concept within creative industries, tourism and experience economy. Self-evidently, the project and this report would not have been brought into being without Nordic Innovation Centre’s generous funding of the project.

Furthermore, Wonderful Copenhagen would like to thank all participating cities for their investment both in money, working hours and last but not least engagement in the project. It has been a pleasure and a privilege to work with our partners across the Nordic and Baltic region in the joint effort to strengthen our international performance and position. We also would like to thank the contributors to this project: the research team, Go Narrow, Malin Gardeström and Marie Wiuff Kruse for proof reading the report.

Last but not least, we would like to thank Radisson SAS Hotels for sponsoring part of the main price to make more tourists take part in the survey.

We hope this project and the report will demonstrate the benefits of working together, practising co-opetition (cooperation and competition), sharing knowledge etc.

We wish every reader a hopefully good experience going through the report. Feel free to co-design your own experience by browsing the different sections and topics in your own order.

Ole Kjaer Mansfeldt
Ellen Marie Vestager
Marie Baek Iversen

Wonderful Copenhagen, July 2008

Field research method

Three different methods

Overall, the project uses three different methods to reach the overall objectives, namely basic research (conceptualising experience design), field research and desk research (analysing social media, websites, cases etc.). In this methods section, the focus is entirely on the field research.

Purpose

By conducting more than 5.000 interviews in the 14 participating cities and more than 2.500 interviews after the holidays in the cities, we have been able to identify how the tourists behave, think, plan, act, do and remember before, during and after their holiday.

Interviews in the tourist information centres

The totally 5.040 on site interviews were completed as hall test interviews, meaning that the respondents were recruited in front of or inside the tourist information centers and then invited to participate in the study inside the tourist information. The study was carried out as self-completion interviews, which means that the respondent independently completed an online questionnaire on the laptop. They were able to get help from professional interviewers if some questions came up. This method secures a high security in the data collection as the data are stored on the same server from all 14 cities participating in the study.

Interviews online after the holiday

The same 5.040 tourists were asked to give their email address to be able to participate in the study. One month after the holiday, they were contacted and asked to complete the second part of the questionnaire online. A total of 2.516 tourists completed the second part, giving a quite high response rate for this kind of survey. The answers from each respondent is linked so it is possible to compare answers from before/during the holiday with the answers from after the holiday.

Data collection

Wonderful Copenhagen engaged Catinét A/S, a Danish full service research institute (member of ESOMAR), as responsible for data collection. Catinét was on site managers in the Danish, Norwegian and Finnish cities, while Catinét hired different partners to conduct the interviews in other cities: IntervjuPoolen AB was responsible in the Swedish cities, Factum Group was responsible in the Baltic cities and Market & Media Research Ltd. was responsible in Reykjavik.

Number of interviews

The cities were divided into three different groups, small, medium and large cities, depending on the number of bed nights in the cities. In the small cities, a minimum of 200 interviews were conducted. In the medium cities, a minimum of 400 interviews were conducted, while a minimum of 600 interviews were conducted in the large cities (see appendix 1 for more details).

Target group

The target group for the study was leisure tourists (one-day visitors or overnight visitors), defined as visitors that 1) is away from home for at least three hours, 2) spends money on "experiences", "culture", "shopping" or similar and 3) lives 30 km or more away from the destination. Wonderful Copenhagen and Catinét agreed to secure a nationality mix among the interviewed tourists that was comparable to the nationality mix at accommodation places in the city for that time of year (August 2007). In reality, all cities have a much larger share of non-domestic tourists in the study compared to the distribution at the accommodation places.

Incentive

The tourists that completed both parts of the questionnaire had the chance to win the main price, a 1.500 € voucher to any airline company and a stay at a Radisson SAS hotel in Copenhagen, Stockholm or Oslo (sponsored by SAS Radisson).

Reading instruction

Reading instruction

This report is not necessarily to be read from A to Z. Instead, we suggest that each reader reads the parts that are of interest to him or her. Hence, we have written the report in different blocks and not as a chronological document. This hopefully makes it possible to read the different elements of the project out of context.

Elements in the project

Having stated what is said above, we still suggest to start with the beginning of the report as well as the project, namely the chapter "Experience design as a concept". Here, the inspiration for the framework of the project, the inspiration for the development of the questionnaire, the idea of seeing tourist experiences as periodical etc. will be presented.

The two other main chapters "Field research" and "Desk research" contain the main results from the vast amount of analysis that has been conducted throughout the course of the project. In these chapters, it is possible to jump in and out of the different sections depending on interest and relevance.

The style of analysis

Even though the project has carried out a lot of quantitative analysis, based on more or less advanced statistical analysis, we have tried to make it as accessible and comprehensible as possible by writing the report in a pragmatic and easy-going style. In doing so, we hope to satisfy as many readers as possible.

Wonderful Copenhagen will of course be happy to assist the readers that want to know more about the statistical analysis, the exact number of respondents in questions and answer possibilities, significance levels etc. Appendix 4 explains how to read the different diagrams and tables.

Experience design as a concept

Background

Background

The concept of experience design is a rather new and somewhat undiscovered concept, both in theory and practice, within tourism as well as in other disciplines.

Therefore, a group of researchers set out to investigate experience design as a point of departure for the project.

The work was done in close collaboration with Wonderful Copenhagen and therefore presents a synthesis of both theoretical and practical definitions and reflections on experience design in city tourism.

Want to know more

This chapter is a shorter version of the full paper “Experience Design: Spatial Temporalities and Performance in the Experience Economy” written by Richard Ek (corresponding author) from Lund University, Jonas Larsen from University of Aalborg (originally Roskilde University Centre), Søren Buhl Hornskov from Region Sjaelland (originally Copenhagen Business School) and Ole Kjaer Mansfeldt from Wonderful Copenhagen.

The full paper was presented at “The 16th Nordic Symposium in Tourism and Hospitality Research” in Helsingborg in September 2007 and will be published as a scientific article titled “A Dynamic Framework of Tourist Experiences: Space-Time and Performances in the Experience Economy” in “Scandinavian Journal of Hospitality and Tourism” (volume 2, 2008).

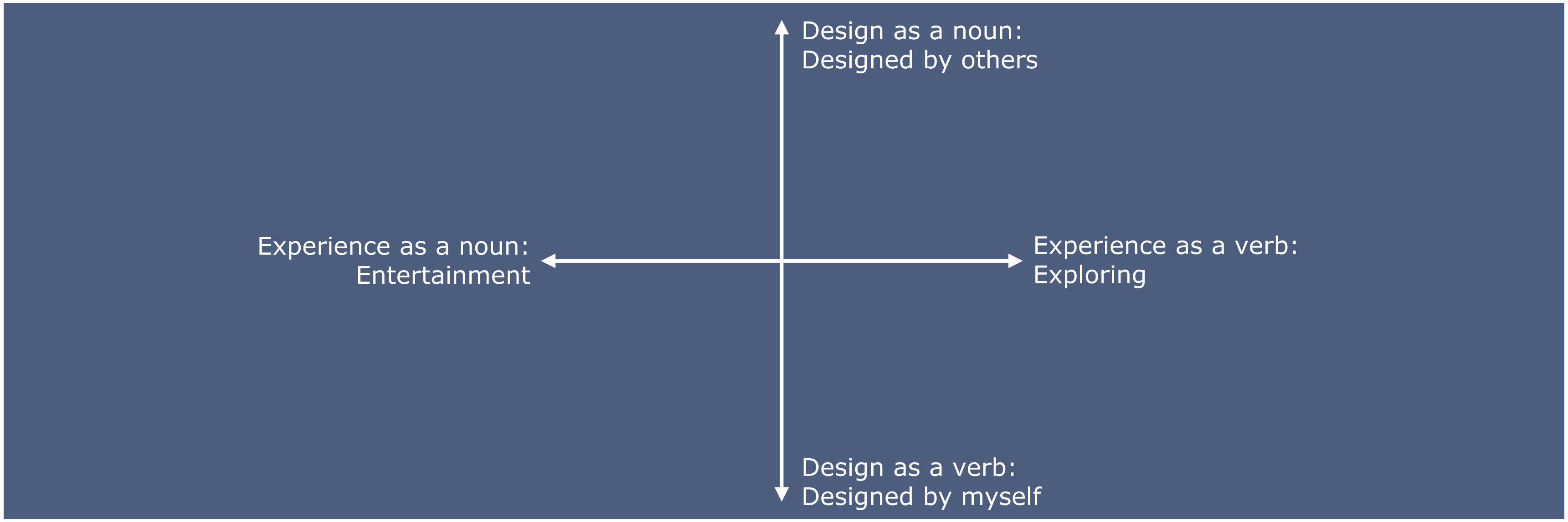
A dynamic framework of tourist experiences

The purpose of the full paper as well as this shorter version is to outline a conceptual model that allows a discussion regarding the design of experiences within city tourism, seen from producers' as well as consumers' points of views.

Introduction

As a part of a wider interest in the 'cultural economy' in urban settings, the economic value of an experience-generated consumption supply has become a centre of attention for a multitude of public and private, commercial and non-commercial organisations. In city management, in sections such as tourism, hospitality and marketing, the notion of experience has been adopted in order to develop innovative approaches and fruitful urban regeneration strategies.

Of substantial importance in Scandinavian countries like Sweden and Denmark are Pine and Gilmore's definition and characterization of the 'experience economy'. They suggest that the economy has evolving from a service paradigm into an experience paradigm, and that revenues would henceforth derive more and more from the staging of memorable, exciting and engaging experiences. The concept of experience economy focus the attention of decision makers – political as well as private – on the potential earnings of experience businesses such as theatres, movie production, video games and museums (Aronsson et al, 2007). The vision of the business as a stage is to a remarkable extent fixed on viewing businesses as enclosed environments in which experiences are paid for and consumed in located and coherent spans of time and isolated geographical spaces. The strengths of this idea are that experiences in an immediate sense have a price. They can be budgeted and their revenues calculated.



Different meanings of experience design

Pine and Gilmore's ideas and models are however directed towards the management of businesses, not complex urban economies and therefore new models and notions of experience has to be developed. The notion of experience economy, in other words, has come to accrue to complex economies such as whole cities and regions.

From our point of view, there is a lack of theory and research that explore the experience economy from a user perspective with an emphasis on corporeality and performance. While it is a central feature of experience production that it involves the performance of the consumers or tourists that are the subjects experiencing, we know little about how tourists actually experience – or perhaps better put, do – tourism, perhaps especially city tourism. This will be investigated through four different definitions and meanings of experience design.

The different meanings of experience design

'Experience' and 'design' are nouns as well as verbs. This fact makes it possible to revise the meanings arising from the etymologies of the two concepts in terms of the static (noun) as opposed to dynamic (verb) attributes.

An experience vs. to experience

As a noun experience is here defined as the observation and spatial participation in an event. Imagine a tourist that observes a parade through the city, or a tourist that participates in a high profile marathon run like New York Marathon. The experience could be an engaging and dynamic experience for the tourist (perhaps especially the marathon runner) but is conceptually speaking distinct in space and time, with clear limitations between the producer and the consumer of the event.

An experience vs. to experience, a design vs. to design

As a verb, 'experience' is defined as go through an emotional sensation. The tourist (still as a watcher of a parade or a marathon runner) is no longer an object for the event (one out of a calculable amount of individuals included in the event) but an active agent who subjectively lives through the event that constantly is reproduced in his or hers mind. The experience as a verb includes here the anticipations of the event (before the event), the emotional sensations that results from living through the event (during the event) and the memories and the recollection once the event is completed (after the event).

As a noun 'design' is in its turn defined as the static form of something shaped out of something, for instance the shape of a telephone, or a theme park. This includes aspects as design, architecture and generally speaking, the modulation of a delimited place. Also the marathon run has its architecture and design, with a stated place for starting and a decided place for the finishing line and a predestined running way through the city.

As a verb, design means the constant delimitation or shaping in form. This definition connects to the verb 'experience', and implies that the subject constantly changes his or hers experience of the event, before, during and after the 'intensive phase' of the process, the experience itself. Expectations is changed due to an input of information and representations of the coming event, the emotional sensation is not constant but changes in a dynamic way, and the memories and recollections are subjectively packaged differently due to the time factor, contemplations and information and representations from external sources.

Using these four meanings of 'experience' and 'design', four definitions of 'experience design' can be conceptualized and characterized as more or less static, more or less dynamic. These four definitions do not just, however, unravel different aspects of the tourist's experiences, but also point towards different notions on the nature of relation between consumers and producers of experiences. The more dynamic an experience design is, the more it implies a co-creating relationship between producer and consumer.

The four meanings of experience design

•**D1** (experience as noun & design as noun): the physical arrangement of an event and its participators in a specific form depicted as taking place in a certain delimited span of time and circumscribed place.

•**D2** (experience as noun & design as verb): the constant reshaping of the experience regarded as delimited in space and time.

•**D3** (experience as verb & design as noun): to live through the physically formed event, including before and after the 'intensive' phase of the experience.

•**D4** (experience as verb & design as verb): the constant reshaping of the emotional sensational and subjective contemplations regarding the experience, its 'before' and 'after', that is, the experience as a seamless process.

When we run through the typology from top to bottom, we register a change in the concepts of experience and design from the more static to the more dynamic. This change corresponds to changing concepts of time and space. D4 marks the culmination of this progression in the sense that the experience is purely individual; it depicts a framework for how the tourist shapes his or hers emotional sensations and physical performances through the unfolding of the experience as a process stretching over time and space. The experience design of D4 is purely phenomenological and individual – and is as such out of reach for the production side of the experience. Instead, D3 becomes this discussions end point. D3 is crucial because it is here, in this state if the progression, that the blurring of the division between consumer and producer becomes complete. It is also here that performativity becomes crucial as an analytic variable and a road into a deeper understanding of the tourist's experience beyond static notions. Let us however begin from the logical starting point, D1.

D1 (experience as noun & design as noun)

D1 is the physical arrangement of an event and its participators in a specific form depicted as taking place in a certain delimited span of time and circumscribed place. This is the definition that reflects mainstream notions of the experience economy as a commercial offering of experiences. It is anchored in the conventional logic of place marketing, that is, the development and packaging of events and physical attractions with the purpose to pull tourists and other kinds of visitors to a physical place, a location in geographical space. Organisations in different constellations of co-operation and competition arrange place in order to make it 'sticky'. The arrangements of experiences in space becomes representations of space through practices as city or place branding, based on a geographical notion of absolute space, where space equals distance and is given container-like qualities.

This definition of 'experience design' is the most static of the four. The experiences are delimited and coherent in space and have a fixed duration in time. Physical space is shaped and designed into a given form by the producer or provider. The consumer is attracted and approaches the offered experience, situated in a geographical space. The experience can only be experienced in absolute space, on a physical place. The physical place is the mediator between provider and consumer. The fixation of the tourist in space and time is a prerequisite for the experience to take place. A few examples on D1 within tourism is a visit to a theme park, a sightseeing-bus tour, a traditional art museum or similar, where the individual's experience is more or less decided and designed beforehand.

D2 (experience as noun & design as verb)

The picture becomes more complex when we turn to the second definition of ’experience design’: the constant reshaping of the experience regarded as delimited in space and time. Even if the former definition (D1) dominates the mainstream marketing logic, several of the scholars interested in experiences have had an ambition to in a more nuanced way focus on the participant of the experience and untie the producer-consumer dichotomy. Pine and Gilmore, for instance, explores the experience realms and discusses experience as either passive or active participation and experience as something the consumer could either be absorbed in or immersed in. The consumer becomes more agent-like even if the possible ways to act is caught in a rudimentary model. Others point at the fact that the experience space is not only filled with the experience provider and the experience-seeking consumer, but also with other visitors or customers. The experience does not only depend on the meeting between provider and customer but on the interaction between all participants.

The production of the experience is a result of the interplay between the place, the products or services offered, the customer, the personnel and other customers.

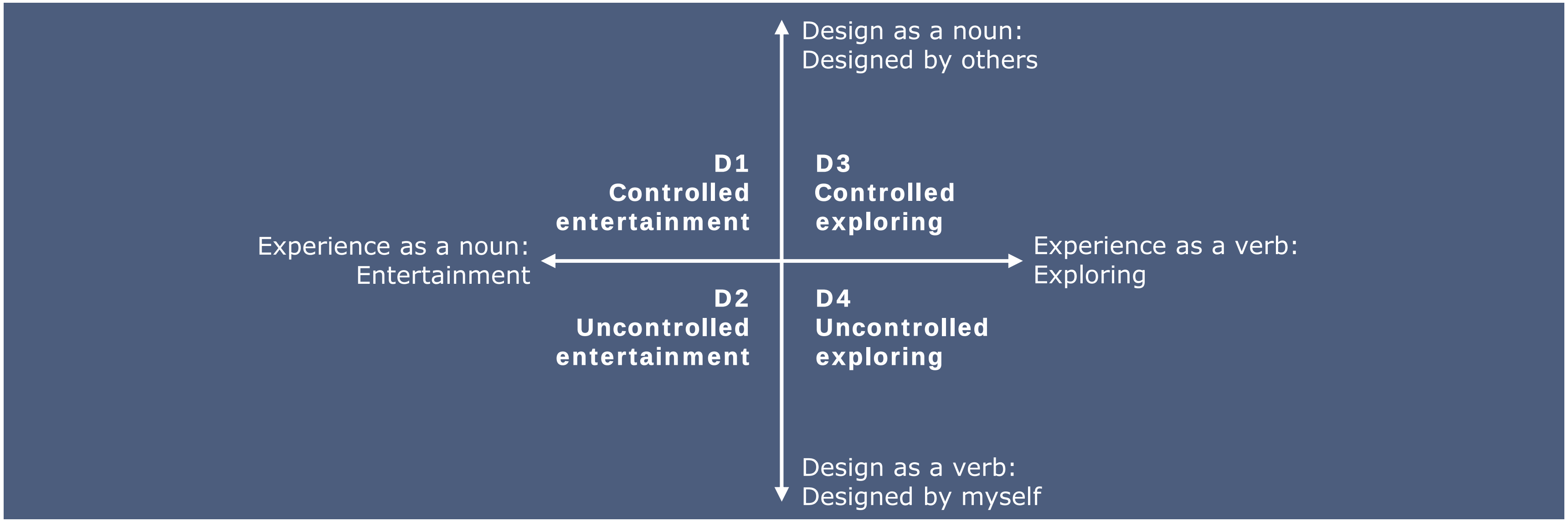
These and other attempts to break out of simplistic models of the experience interaction are only successful to some degree. The co-production of experience is made possible only in a network, but the provider and the customer are still distinct figures in that network. Underpinning this approach is a notion of space as relative, as the experience is argued to take place in a network-mediated social space within a physical space with absolute characteristics, and where the apprehension of the situation is relationally dependent. More dynamics is allowed into the model but still from the notion that space is ultimately something that is filled with processes, procedures and interaction (and time remains fixed). This depiction of the experience allows the constant reshaping of the experience by the consumer or tourist, but what happens before and after the actual network-based interaction is not fully attended to.

D3 (experience as verb & design as noun)

We would however like to argue that in order to be able to better understand the tourist's experiences of experiences, a more phenomenological approach is required for. Therefore we now turn to the third and in discussion final phase of the model (since D4 is left out of the model).

The third definition of experience design is as follows: to live through the physically formed event, including before and after the 'intensive' phase of the experience. The crucial difference to D1 and D2 is that this definition do not limit the subjective experience to a certain place and specific span of time. As experience is defined as a verb, a continuous process, the enlivenment through the experience indicates expectations before and recapitulations after the experience as a noun. The focus in this definition is more explicitly on the individual tourist and his or hers experiences, and, as a consequence, becomes a step from a functional to a phenomenological standpoint.

The tourist is not only a person that becomes immersed or absorbed in an experience, for instance as a passive spectator. This third definition of 'experience design' do not only distances itself from a notion of time as neatly compartmentalized in distinct time spans, but also distances itself from a simplified but common notion of space as divided in neat sections, that is, clearly delimited places where something takes place in. In this definition of experience design space becomes relational. Relational space is the product of processes and events rather than that processes and events takes place in space. Space and place is always in a process of becoming since it is the product of relations, which are materially embedded practices, which have to be carried out. Space could therefore be seen as a verb rather than a noun.



The experience design wheel

The outline above can be summarized in a more practically oriented figure (see figure above). In the figure the internal connection and tension between the two concepts ‘experience’ and ‘design’ are unravelled and exemplified through the four descriptions ‘controlled entertainment’, ‘uncontrolled entertainment’, ‘controlled exploring’ and ‘uncontrolled exploring’. These concepts is in turn derived from the (for the model’s sake) presuppositions that experience as a noun equals ‘entertainment’, and that experience as a verb equals ‘exploring’, and, that design as a noun is producer-driven, something designed by others than the tourists themselves, and that design as a verb is consumer-driven, something designed by the tourists.

As a result, ‘experience design’ as the physical arrangement of an event and its participators in a specific form depicted as taking place in a certain delimited span of time and circumscribed place the experience is designed for the tourist and defined in space and time (D1 – Controlled entertainment).

When ‘experience design’ is the constant reshaping of the experience regarded as delimited in space and time, the experience is still designed for the tourist but undefined in space and time (D3 – Controlled exploring).

When ‘experience design’ is to live through the physically formed event, including before and after the ‘intensive’ part of the experience, the experience is designed by the tourists but defined in space and time (D2 – Uncontrolled entertainment).

The performance turn: Entertainment vs. exploring

Much cultural tourism research has been concerned with how tourists are drawn to and experience – sense and represent – destinations and cities, and the ‘performance turn’ continues in that direction. But it also redirects tourism theory and research in several ways.

First, the ‘performance turn’ is formed in opposition to the ‘tourist gaze’ and other representational approaches privileging the eye by arguing that ‘tourism demands new metaphors based more on being, doing, touching and seeing rather than just being entertained or “seeing”. The ‘tourist gaze’ has been extremely influential in portraying the tourist experience as a visual experience; ‘the tourist gaze’ suggests that people travel to cities that are striking visually. In this optic, tourism companies and organisations need to design experiences (places, events and marketing) that please the eye. In contrast, ‘the performance turn’ highlights how tourists experience in more multi-sensuous ways that can involve more bodily sensations, from touching, smelling, hearing and so on.

Tourists encounter cities through corporeal proximity as well as distanced contemplation. Metaphorically speaking, in addition to looking at stages, tourists step into them and enact them corporeally.

Secondly, the ‘performance turn’ explicitly sees tourism as intricately tied up with significant others, such as family members and friends, a fact that many tourism studies have overlooked. Most tourists not only bring their own bodies but travel with other bodies too: tourism performances, such as photographing and map-finding and building are collaborative performances. Most tourism performances are performed collectively, and this sociality is in part what makes them pleasurable. City tourism is not only a way of experiencing (new) places and events but also an emotional geography of sociability, of being together with close friends and family members. Tourists are not only questing authentic places and events; they also search authentic sociability between themselves.

This also means that the places in the cities where tourism takes place are not necessarily extraordinary and clearly demarcated. City tourism takes place upon various stages with often-fluid borders and little management, regulation and direct choreographing, and many tourists do not necessarily stay on the beaten track all the time.

Thirdly, in contrast to the many studies portraying tourism an over-determined stage where tourists are reduced to passive spectators that follow pre-scripted routes, the 'performance turn' insists on uncovering creativity, detours and productive practices. Cultural tourism research has traditionally focused upon how tourism companies and organisations through guides and brochures design cities by inscribing them with place-myths and staging them in post-card fashions. Traditionally, cultural tourism researchers ascribe great power to such symbolic design work in shaping tourist cities and choreographing how tourists see and photograph them. In this fashion, effectively people travel in order to see and photograph what they have already consumed in image-form.

This model essentially portrays commercial photography as all-powerful design machinery that turns the performances of tourists into a ritual of quotation where tourists are framed and fixed rather than framing and exploring. While tourism performances are surely designed or choreographed by guidebooks, concrete guidance, promotional information and existing place-myths, the 'performance turn' argues that tourists are not just written upon, they also enact and inscribe cities with their own 'stories' and follow their own paths (as D3 depicts above). Performances are never determined by their choreographing, since there is always an element of unpredictability: the places and performances that city tourists enact are never completely identical to the scripts in marketing material, guidebooks and so on. Moreover, the 'performance turn' highlights how tourists not only consume city experiences but also co-design and co-exhibit them. Much conceptual writing about tourism and 'the experience economy' pacify the tourist. A too fixed focus upon already inscribed cities and

Perspectives for research

staged experiences render the tourist a passive sightseer consuming cities in prescribed fashions. And even when tourists 'do sightsee' they are not completely passive; most are busy making, for instance, photographs. The 'performance turn' acknowledges that in the act of consuming, tourists turn themselves into producers; they create photographs that produce, reproduce and violate 'place myths' that city tourism organisations have designed and promoted.

Perspectives for research: Before, during & after experiences

While the 'tourists gaze' (i.e. the tourist as an object that needs to be entertained) also acknowledges the before, during and after of tourism performances, it works with a one-way, pre-programmed flow of images and messages from tourism organisations to tourists. We suggest a more active role of the tourist with clearer consequences for revision on the management- or design-side of the relation.

Experience design may be approached as the performative interplay of management agencies - tourist organizations, municipalities and other authorities – and tourists/consumers as it is played out through and over time and space. It is important for tourism city designers to get a more systematic picture of tourists' spatial practices, where they move and during what hours. Much tourism literature implies that most tourists mainly follow the 'beaten tracks' outlined in guidebooks and other promotional material, but from a performance perspective this can not be taken at face-value. Therefore, research on the tourists' performative actions and intentions before, during and after experiences and experience designs needs to be done in order to make way for a more fruitful relation and interplay between the production or management side of experiences and the consumer side of experiences.

Implications for the further research

The paper and its conceptualisation and discussion of experience design have had a substantial impact on the project, the further research, the method development etc.

Firstly, the recommendation to do research in the three phases before, during & after the tourists' experiences has been followed to the highest possible degree. The before phase was excluded since it is difficult to get in touch to the tourists before they are actually in the city.

Instead, the tourists were contacted and interviewed during their visit to the tourist information centre in each city. Hence, the first part of the questionnaire covered a combination of before and during the tourists' experiences, since most tourists visit the tourist information in the beginning of their stay in the city.

The second part of the questionnaire were sent to all tourists approximately one month after their stay to get a deeper understanding of their reflections and memories of the holiday.

Secondly, the four definitions of experience design and the experience design wheel has inspired to the development of four scale questions that can be used to characterise the tourists' way of experiencing (a x-y plot in the experience design wheel). These four questions explore the tourists' experiences on four scales: entertainment vs. exploring, seeing vs. doing, designed by others vs. designed by myself and planned vs. spontaneous. Of these, the most discriminating questions, namely entertainment vs. exploring and designed by others vs. designed by myself have primarily been used in the analysis.

Thirdly, the four definitions has inspired to method development in all other aspects of the analysis (webpage analysis, brochure analysis, tourist image analysis, case analysis etc.).

Field research

S. 21

Introduction

In this chapter, the results from the survey, counting a total of 5,040 tourists in the first part of the survey (in the cities) and 2,516 tourist in the second part of the survey (online after they went home) will be discussed. The data was collected by an independent research institute at the tourist information centres in the 14 cities. Each researcher had to secure that different quotas, such as an equal amount of e.g. men and women, national and international tourists, were met to make sure they all were well represented in the survey. (See the questionnaires in appendix 1).

The tourists were asked a large amount of questions and the answers will be presented and analysed in different ways in the following sections. First, we look at the demographic background variables to get a picture of who the tourist are. Second, we go through questions regarding the tourists' inspirations to choose, competitor cities, their reasons to go, their motivations to experience, what specific activities they plan to do during their holiday, how they decided to do specific activities and thereafter how satisfied they were with different holiday elements as well as the overall satisfaction with their stay.

Finally in this section we focus on how the tourists perceive the cities according to certain values. All of these results in this section are presented as rankings, making it possible to compare the results between all the cities.

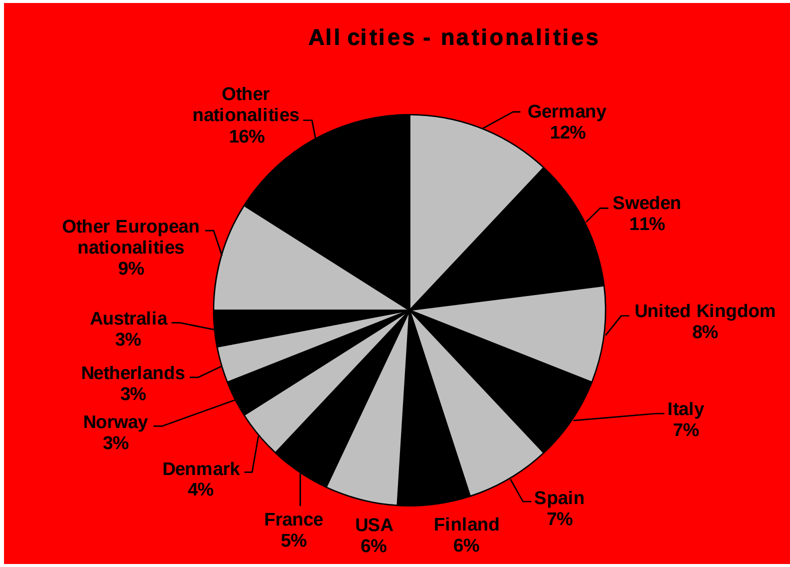
In the next section we compare the tourists' reasons to go to a specific city and motivations to experience with whether these lived up to their expectations.

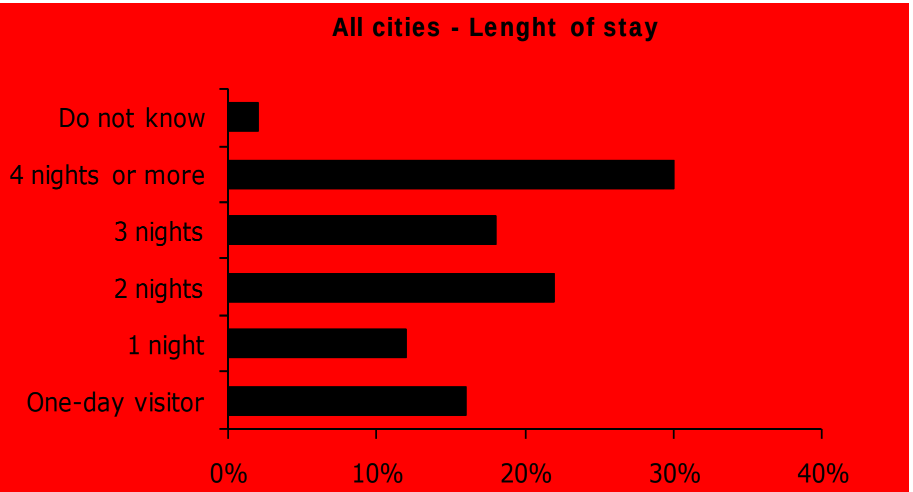
In the following three sections of the chapter we present three different ways of segmenting the tourists, with the use of a demographic, psychographic and experience design perspective.

The chapter is wrapped up with presentation of open answers from the questionnaire dealing with the experiences the tourists had in the cities.

Demography

S. 23



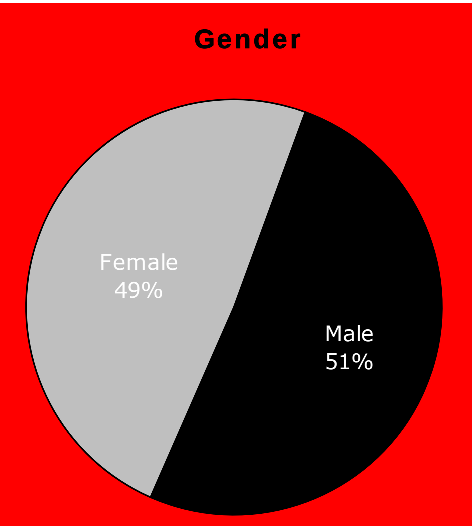


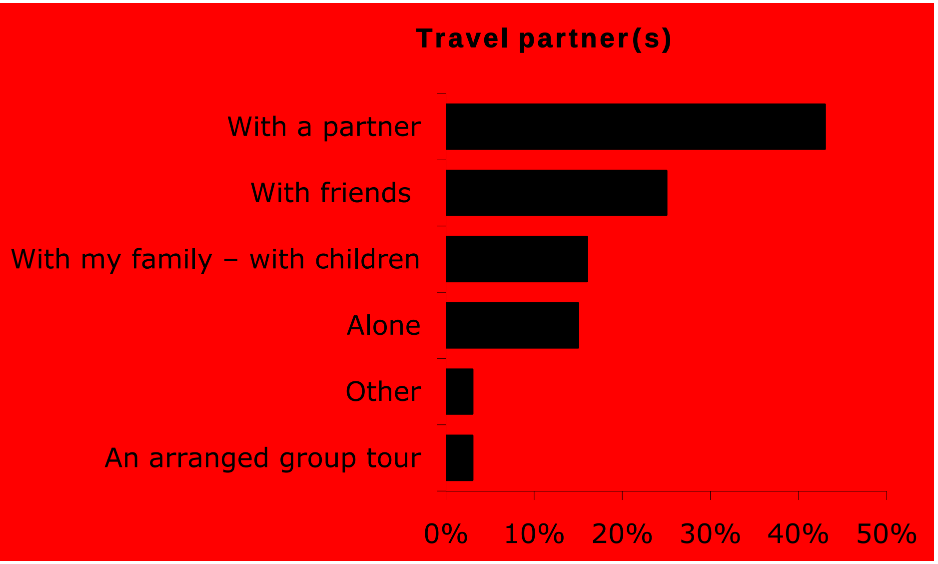
Where are they from and how long do they stay?

The majority of tourists in the survey are from various European countries. The largest groups are Germans, followed by Swedes, Brits, Italians and Spaniards, respectively.

The only non-European country to rank in the top ten is USA. It is a challenge for the cities to attract countries outside Europe, especially emerging countries such as China and India.

Most tourists stay 2-4 nights on their city-vacation. However, the one-day visitor also ranks high. This is mostly due to the fact that many of the involved cities are easy to visit on a day-trip because they are situated close to another often visited city, e.g. Malmo/Copenhagen, Tampere/Turku/Helsinki, Stockholm/Uppsala. Another kind of one-day visitors worth mentioning are tourists who are on a cruise and sometimes only have half a day to do sightseeing before the ship leaves port.

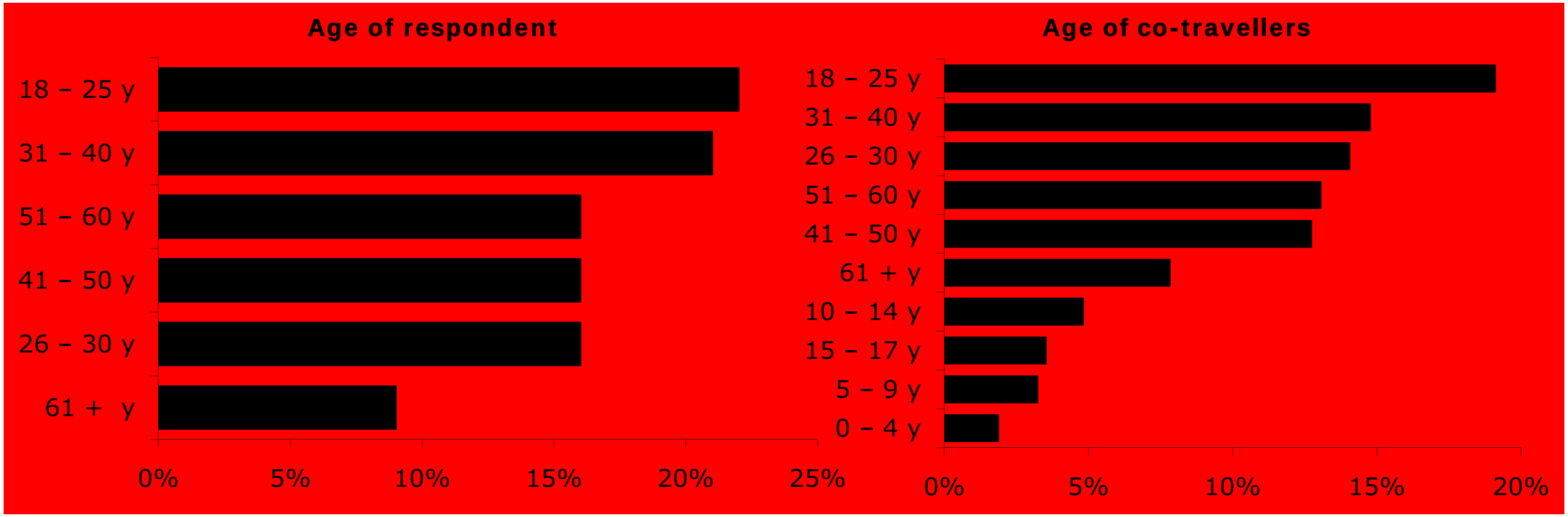




Men, women and who they travel with

The tourists are almost evenly distributed in terms of gender. However, there are a bit more male tourists than female tourists. The result nevertheless corresponds well with the survey criteria, as previously mentioned.

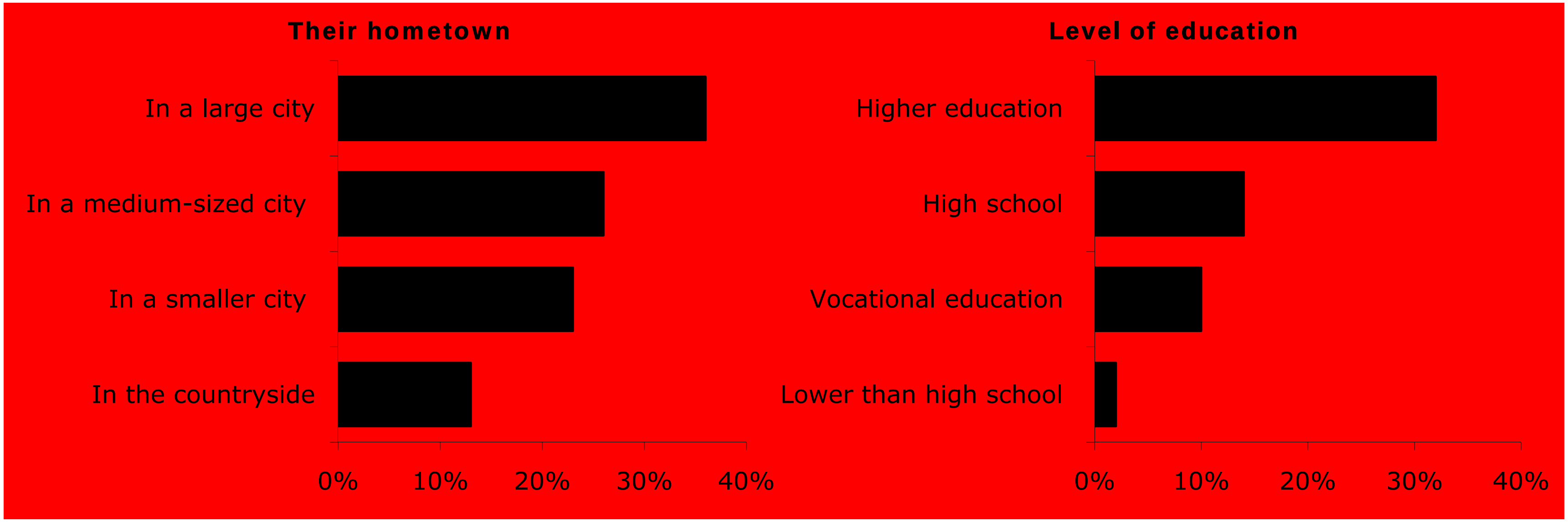
Most tourists travel with their partner, wife or husband (43%) or with friends or acquaintances (25%). An interesting observation is that the number related to arranged group tour is extremely low, only 3%. This shows that the majority of tourists arrange activities themselves while staying in the city and can thus be influenced upon arrival in the city or beforehand (typically online). On the other hand, tourists on a group tour have typically their own guide with them, and their experiences are as a result hereof very often planned in advance.



How old are they?

When looking at age groups, the biggest group is also the youngest. The 18-25-year-olds make up 22% of the total number of tourists. The second biggest group is age 31-40. This tells us that the two biggest groups of tourists are typically young singles or couples and families – two very distinct groups with different ambitions regarding their vacation. As we will later see in this report (segments analysis p. 87-97) the 18-25-year-olds appear in the party segment, whereas the 31-40-year-olds are strongly represented in the relaxing segment. The cities must therefore focus on attractions, which appeal to both of these different segments.

The biggest group of co-travellers is also the 18-25-year-olds. Most likely the co-traveller is the partner, wife or husband (see previous page) and/or friends/acquaintances. However, a large part of the co-travellers are under 18 years old, that is 13,4%. This group does not travel on their own and the challenge here is therefore to find attractions, which are interesting for both parents and their children.



Well educated and urban tourists

When looking at all the cities, most of the tourists (36%) live in a large city themselves (500,000+ inhabitants). However almost 25% live in a smaller city (50,000-500,000 inhabitants). Only 13% live in the countryside. This means that most of the tourists are used to having the opportunity to experience different activities and sights in their home environment – a fact which might mean high expectations when visiting a new city.

The tourists who have participated in the survey are very well educated – almost one third of them have a higher education (master or Ph.D.), whereas only 10% have a vocational education. Different levels of education often mean different preferences and therefore this can influence on how the tourists want to experience the city they visit.

Primary destination?

CITY	YES	NO
COP	52,4%	47,6%
AAR	54,6%	45,4%
MAL	44,8%	55,2%
UPP	57,4%	42,6%
STO	67,1%	32,9%
BER	26,7%	73,3%
OSL	44,5%	55,5%
TAM	51,4%	48,6%
TUR	49,5%	50,5%
HEL	50,0%	50,0%
REY	39,7%	60,3%
TAL	51,0%	49,0%
RIG	60,6%	39,4%
VIL	43,7%	56,3%
ALL	51,0%	49,0%

How many times on a leisure trip to THIS city

CITY	1st time	2 times	3 times	4 times	5 times +
COP	57,3%	11,6%	7,8%	3,4%	19,8%
AAR	69,6%	6,9%	7,8%	3,9%	11,8%
MAL	54,1%	8,3%	9,3%	5,4%	22,9%
UPP	64,1%	9,4%	4,3%	3,4%	18,8%
STO	48,6%	7,6%	4,0%	3,3%	36,6%
BER	80,2%	9,4%	3,8%	1,9%	4,7%
OSL	71,2%	13,3%	3,3%	1,8%	10,3%
TAM	56,1%	11,2%	6,5%	3,7%	22,4%
TUR	52,3%	9,2%	6,4%	3,7%	28,4%
HEL	62,0%	10,7%	4,0%	2,7%	20,7%
REY	83,3%	7,9%	0,8%	1,6%	6,3%
TAL	71,8%	8,2%	2,1%	3,1%	14,9%
RIG	75,9%	12,1%	3,0%	2,0%	7,0%
VIL	83,3%	9,7%	4,2%	0,0%	2,8%
ALL CITIES	64,4%	10,0%	4,8%	2,9%	17,9%

First time in the city, considered going somewhere else

A little more than half of the tourists have the city they visit as the primary destination on their vacation, hence 49% of the tourist do not. This can be related to the fact that many tourist are one-day visitors and many of the cities presented in the survey are easy to visit on a day-trip. As we can see in the table above, 52,4% have Copenhagen as their primary destination and 44,8% have Malmo as their primary destination.

Most of the tourists visit the city for the first time (64,4%). 17,9% have been to the visited city five times or more before. To be able to embrace these two very different groups, the tourism organisations have to make sure that they have offers that satisfy both groups as well as those in between.

Transportation to the city

CITY	Plane	Bus	Train	Private car	Other	Boat	Hired car
STO	28,8%	29,1%	32,4%	16,9%	24,8%	16,5%	4,3%
TUR	22,5%	18,9%	27,9%	36,9%	9,9%	18,9%	13,5%
AAR	25,0%	35,2%	25,0%	41,7%	9,3%	9,3%	2,8%
REY	41,6%	38,4%	6,4%	16,8%	11,2%	2,4%	24,8%
MAL	20,9%	23,3%	38,8%	32,5%	14,1%	3,9%	3,4%
UPP	19,7%	18,8%	26,5%	37,6%	21,4%	2,6%	10,3%
OSL	42,3%	25,9%	21,5%	19,0%	11,7%	12,4%	3,6%
RIG	48,2%	34,2%	13,6%	18,1%	11,1%	4,5%	5,5%
HEL	45,2%	20,4%	12,7%	16,7%	15,1%	19,7%	3,0%
COP	36,2%	15,4%	35,9%	20,1%	14,8%	4,7%	3,0%
VIL	32,4%	26,8%	18,3%	28,2%	11,3%	2,8%	9,9%
TAL	34,0%	25,0%	8,0%	14,5%	11,0%	32,5%	4,0%
BER	35,8%	17,0%	18,9%	19,8%	9,4%	14,2%	13,2%
TAM	24,3%	21,5%	30,8%	36,4%	4,7%	4,7%	4,7%
ALL	34,4%	24,6%	23,2%	22,9%	13,8%	11,8%	6,1%

Prefer to travel by plane or train

When looking at how the tourists travel, going by plane is the most favoured way to travel. Especially tourists travelling to Riga (48,2%), Helsinki (45,2%) and Reykjavik (41,6%) prefer flying.

Going by bus is the second most common mean of transport – 24,6% of all the tourists arrived to the city by bus.

Most long-stay visitors

#	CITY	SCORE
1	REY	69,6%
2	STO	65,4%
3	RIG	59,8%
4	COP	54,2%
5	HEL	53,8%
6	VIL	48,5%
7	TAL	44,0%
8	UPP	42,8%
9	OSL	42,4%
10	AAR	40,9%
11	BER	39,9%
12	MAL	30,2%
13	TAM	29,6%
14	TUR	26,1%
AVG	**ALL**	**48,6%**

Most one-day visitors

#	CITY	SCORE
1	MAL	38,5%
2	UPP	33,5%
3	TAM	24,5%
4	AAR	21,2%
5	TAL	20,5%
6	HEL	18,4%
7	OSL	16,2%
8	TUR	15,1%
9	COP	13,3%
10	BER	11,1%
11	RIG	8,9%
12	VIL	7,0%
13	STO	6,0%
14	REY	2,9%
AVG	**ALL**	**16,5%**

Some stay longer, some don’t

Reykjavik is the top scorer with app. 70% when it comes to visitors who stay three nights or more. Stockholm comes in second with 65% of the visitors staying in the city for a longer period.

While the average share of long-stay visitors is app. 49%, Turku, Tampere and Malmo reach a 30% share or less.
Not surprisingly, this ranking is almost the opposite of the table ranking the cities’ share of one-day visitors.

Malmo has the largest share of one-day visitors of ALL the cities – with almost four out of ten coming to the city for one day without staying overnight. Another Swedish city, Uppsala, ranks second with one out of three visitors being one-day visitors.
In the other end of the ranking, Reykjavik has the smallest share with app. 3% of all visitors being one-day visitors. The average share of one-day visitors is 16.5%.

The most interesting, though not surprising, conclusion is that the four cities with the largest share of one-day visitors are ‘smaller’ cities in the respective countries, while the four cities with the smallest share of one-day visitors are all the capitals of the respective countries.

Most single travelers

#	CITY	SCORE
1	UPP	25,6%
2	MAL	23,8%
3	TAM	22,3%
4	VIL	16,7%
5	HEL	16,1%
6	STO	15,4%
7	BER	14,7%
8	COP	14,5%
9	TAL	14,0%
10	AAR	14,0%
11	REY	11,5%
12	TUR	11,3%
13	OSL	9,5%
14	RIG	9,0%
AVG	**ALL**	**15,1%**

Most families with children

#	CITY	SCORE
1	UPP	22,6%
2	COP	18,8%
3	STO	18,5%
4	BER	18,1%
5	TUR	18,1%
6	MAL	17,6%
7	TAM	17,3%
8	RIG	16,6%
9	OSL	15,9%
10	AAR	13,5%
11	REY	13,4%
12	TAL	11,8%
13	VIL	11,8%
14	HEL	10,5%
AVG	**ALL**	**15,9%**

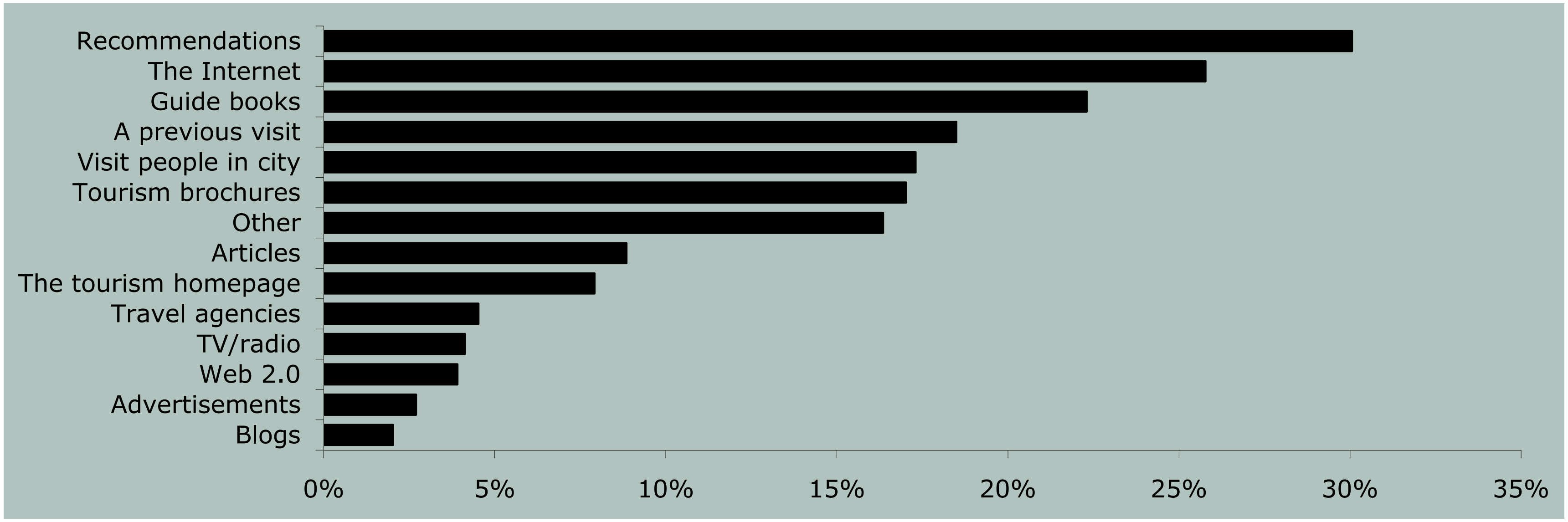
Travelling alone or with children

The two Swedish cities, Uppsala and Malmo, top the list when it comes to visitors travelling alone. Along with Tampere, the share is higher than the average of app. 15%. Riga and Oslo have less than 10% single travellers, making them the least “single’s cities”.

Uppsala tops the ranking with app. 23% when it comes to families travelling with children. Copenhagen and Stockholm are second and third with respectively 18,8% and 18,5% of all the visitors. On the other hand, Helsinki, Vilnius and Tallinn have the smallest share of families with children of ALL.

City rankings

S. 32



Inspirations when choosing destination

Introduction

This section shows what the tourists were inspired by when choosing their holiday destination. The answers provide information in terms of where the cities should allocate resources regarding marketing and communication – and where they should prioritise differently.

Results

Generally speaking, there is a hierarchy in terms of inspiration sources, where personal sources have the largest say, general sources the second largest and commercial sources the least important say.

As the table above shows, a large share of the 5.040 tourists say they are inspired in their choice by personal sources such as recommendations (30%), previous visits (19%) and a plan to visit people they know (17%).

The tourists also rely on general sources of inspiration such as the Internet (26%) and guidebooks (22%).

Some tourists look in tourism brochures (17%) and the official tourism website (8%) for inspiration.

The least important sources of inspiration are blogs (2%) and social media (4%), which are only frequented by a small number of the tourists who participated in this survey.

A point to be made here is that the typical visitor at the official tourist information centre is probably very different from the typical visitor on the social media sites such as Tripadvisor.com.

The overall share of tourists using the social media is probably higher, whereas the share of all tourists (not only those going to tourist information centres) using tourism brochures and official homepages is probably lower than in this survey.

Recommendations

#	CITY	SCORE
1	BER	39,1%
2	RIG	39,0%
3	TAL	35,5%
4	COP	35,1%
5	REY	33,2%
6	OSL	31,3%
7	AAR	31,2%
8	STO	30,2%
9	VIL	29,4%
10	HEL	27,3%
11	MAL	26,4%
12	UPP	25,9%
13	TUR	23,4%
14	TAM	18,3%
	ALL	30,9%

Internet in general

#	CITY	SCORE
1	RIG	32,9%
2	TAL	32,4%
3	REY	31,7%
4	BER	30,7%
5	OSL	28,7%
6	HEL	27,1%
7	TUR	26,4%
8	MAL	26,2%
9	TAM	23,8%
10	STO	23,1%
11	COP	23,0%
12	VIL	22,9%
13	AAR	22,3%
14	UPP	16,8%
	ALL	26,5%

Guidebooks

#	CITY	SCORE
1	BER	37,1%
2	UPP	33,5%
3	REY	32,7%
4	RIG	25,8%
5	TAM	25,2%
6	OSL	23,4%
7	VIL	22,9%
8	TUR	22,4%
9	COP	20,9%
10	HEL	20,8%
11	MAL	20,7%
12	TAL	20,2%
13	STO	18,8%
14	AAR	13,9%
	ALL	23,0%

Top three inspirations when choosing destination

Recommendations mean a lot in Bergen

The average visitor in all cities states “recommendations” as the top inspiration when choosing a destination. The average is 31%.

Bergen and Riga are close to the top when it comes to this aspect with almost 40% of all visitors choose the city because of recommendations, while the visitors in Tampere, Turku and Uppsala less often seem to go because of recommendations.

The Internet is inspirational, especially in Riga

The Internet is a major inspiration. The average visitor states the Internet as the second most popular inspiration when choosing destination, the average of ALL being 26,5%. ALL scores relatively high on this scale, but Riga, Tallinn and Reykjavik come out in the top three, while Uppsala, Aarhus and Vilnius are the bottom three cities.

Guide books inspire to go to Bergen

Even though the Internet can be major inspiration to go anywhere in the world, guidebooks are still a major source of inspiration when it comes to travelling. The average visitor states guidebooks as the third most popular inspiration source with an average score of 23,0%.

The cities of Bergen, Uppsala and Reykjavik score more than 30% in this respect, while the cities of Aarhus and Stockholm score less than 20%.

A previous visit

#	CITY	SCORE
1	COP	27,0%
2	STO	25,4%
3	MAL	23,6%
4	AAR	22,3%
5	TUR	20,9%
6	UPP	19,3%
7	HEL	17,9%
8	TAM	17,3%
9	TAL	15,8%
10	OSL	14,6%
11	VIL	13,9%
12	BER	13,9%
13	RIG	12,2%
14	REY	11,7%
	ALL	19,0%

A visit to friends & family

#	CITY	SCORE
1	UPP	25,4%
2	TUR	24,9%
3	TAM	24,3%
4	STO	23,1%
5	HEL	20,8%
6	AAR	19,3%
7	VIL	16,4%
8	MAL	16,3%
9	OSL	16,0%
10	COP	15,8%
11	RIG	15,3%
12	REY	14,6%
13	TAL	10,1%
14	BER	9,4%
	ALL	17,8%

Personal inspiration is also important

Copenhagen has many previous visitors

Almost one out of five visitors are inspired to re-visit because of a previous visit to the specific city. A clear indication of the fact that the tourists believe these cities have a lot to offer that they cannot be covered on a short trip.

For the cities of Copenhagen, Stockholm and Malmo, this inspiration share is above or close to one out of four visitors, while Reykjavik, Riga, Bergen and Vilnius all are in the bottom.

People go to Uppsala to visit people they know

Within most of the cities, a large percentage of the visitors go to the city to pay a visit to friends and/or family, for some cities the number is 25%. For these tourists the purpose of the visit is hence not to see famous attractions or cultural institutions, instead the objective is to spend time with people they know.

Other inspirations to choose destination

City	Brochures	Articles	City web	Agencies	TV / radio	Web 2.0	Ads	Blogs
COP	14,1%	9,9%	7,1%	3,0%	4,5%	3,5%	3,7%	1,4%
AAR	13,4%	7,4%	7,9%	2,5%	3,5%	2,5%	**4,5%**	2,0%
MAL	21,5%	9,1%	10,4%	3,6%	1,6%	3,4%	2,1%	**0,3%**
UPP	17,8%	5,1%	6,6%	3,0%	5,1%	**2,0%**	2,0%	2,0%
STO	13,6%	7,3%	10,2%	3,1%	4,1%	3,6%	2,8%	2,1%
BER	**28,7%**	7,9%	8,4%	6,9%	3,5%	5,0%	2,0%	**5,9%**
OSL	21,7%	10,3%	9,0%	7,1%	5,3%	3,6%	2,2%	2,2%
TAM	27,7%	**4,0%**	**10,9%**	**1,5%**	**0,5%**	5,4%	3,0%	2,5%
TUR	22,4%	6,0%	9,0%	2,5%	3,5%	3,0%	3,0%	4,0%
HEL	**13,3%**	8,2%	8,5%	4,9%	4,6%	2,2%	2,4%	1,4%
REY	22,9%	12,2%	**3,4%**	**7,3%**	**7,8%**	**8,3%**	4,4%	2,4%
TAL	13,7%	9,8%	7,8%	7,3%	4,1%	4,1%	2,6%	2,1%
RIG	13,5%	**16,6%**	6,9%	5,9%	6,9%	6,6%	3,6%	2,0%
VIL	18,4%	7,5%	3,5%	5,0%	1,5%	7,0%	**1,0%**	3,0%
ALL	17,5%	9,1%	8,2%	4,7%	4,2%	4,0%	2,8%	2,1%

Other inspirations to choose destination

If we look at other inspirational sources, analogue as well as digital media, the tourists have different preferences depending on where they wish to go.

18% of all tourists still use tourism brochures as inspiration when deciding on a holiday destination, ranking from 13% in Helsinki (lowest) to 29% in Bergen (highest).

Printed articles about the destination have inspired 9% of all tourists. Riga has the highest share of tourists inspired by this with 17%, while Tampere has a much lower share with 4%.

Online inspiration, apart from the Internet in general, is dominated by the official tourism websites, but only 8% of the tourists, although recruited for the survey in the official tourist information centre, have also been to the official tourism website. This number is even smaller in Reykjavik, where just 3% has clicked their way through visitreykjavik.is. Tampere has succeeded in bringing in the largest share of visitors to their website, namely 11%.

Online social communities such as tripadvisor.com and virtualtourist.com are inspirational sources to even fewer tourists (4%). Ads are an inspiration to only 3% of all tourists – a higher number in Aarhus, Reykjavik and Copenhagen but less in Vilnius.

If we look at the analogue media versus the digital media we see how the analogue inspiration sources combined make up 26,6% (brochures and articles), whereas the digital inspirations amounts to 14,3% (CTO's websites, web and blogs). Many inspiration sources can be placed under both topics, such as ads and TV/radio programmes.

Cities considered as alternative destinations

City	COP	AAR	MAL	UPP	STO	BER	OSL	TAM	TUR	HEL	REY	TAL	RIG	VIL	ALL
COP		**60,8%**	**59,9%**	23,5%	**32,7%**	31,7%	36,7%	12,1%	13,4%	20,1%	**11,4%**	11,9%	8,6%	2,1%	23,6%
AAR	12,5%		4,1%	1,6%	1,8%	3,0%	1,9%	**1,5%**	2,7%	**1,6%**	3,8%	**1,1%**	**0,5%**	**0,0%**	**3,1%**
MAL	29,4%	11,9%		12,8%	14,5%	7,5%	8,5%	4,5%	6,4%	3,0%	1,1%	1,9%	1,8%	1,6%	8,7%
UPP	5,6%	4,6%	4,1%		11,4%	5,5%	4,2%	2,0%	**2,1%**	2,0%	1,6%	1,4%	1,8%	1,6%	4,1%
STO	**35,6%**	20,1%	29,7%	**65,2%**		29,6%	36,0%	23,1%	23,0%	32,4%	10,9%	23,0%	16,8%	6,9%	**25,2%**
BER	11,0%	6,7%	5,2%	12,8%	10,8%		**39,9%**	7,0%	5,9%	7,7%	5,4%	5,1%	1,8%	1,6%	10,8%
OSL	23,1%	15,5%	11,4%	16,0%	25,3%	**57,3%**		9,5%	10,7%	16,9%	**11,4%**	10,8%	7,9%	3,7%	15,2%
TAM	1,8%	**0,5%**	**1,3%**	1,6%	**1,3%**	4,5%	**1,1%**		18,7%	15,1%	**0,5%**	2,2%	2,4%	2,1%	3,9%
TUR	1,8%	2,6%	2,6%	3,7%	3,1%	5,5%	2,8%	29,6%		16,2%	1,6%	5,1%	2,4%	1,1%	5,5%
HEL	15,0%	11,9%	5,7%	10,2%	21,3%	11,1%	13,4%	**51,8%**	**47,6%**		7,6%	**43,4%**	19,9%	14,3%	17,7%
REY	2,9%	6,2%	1,6%	**1,1%**	4,3%	7,5%	7,6%	5,5%	2,7%	4,3%		4,3%	2,9%	3,2%	4,1%
TAL	8,3%	4,1%	3,4%	4,3%	10,1%	3,5%	5,1%	20,1%	20,3%	**38,6%**	2,2%		**53,9%**	45,0%	16,1%
RIG	4,3%	2,1%	2,1%	1,6%	5,8%	**2,0%**	3,2%	7,0%	9,1%	16,7%	1,6%	37,9%		**54,0%**	9,8%
VIL	**1,1%**	1,5%	2,1%	1,6%	3,3%	**2,0%**	1,4%	2,5%	7,0%	9,4%	1,6%	25,5%	45,0%		8,3%

Competitor cities

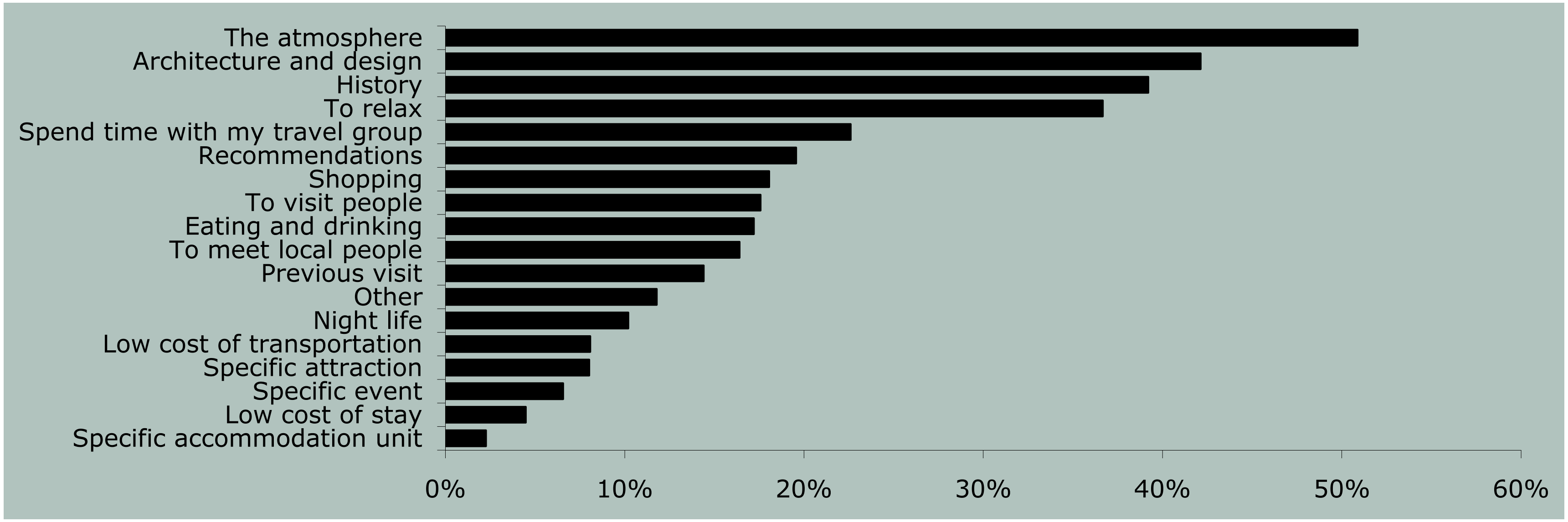
Stockholm is the biggest competitor of all

Stockholm is the city that most of the tourists considered as an alternative destination for their holiday (25,2%), closely followed by Copenhagen (23,6%). Hence, one out of four tourists considered Stockholm and Copenhagen as destination before choosing to go somewhere else. While Copenhagen is the top alternative city in four other cities (Aarhus, Malmo, Stockholm and Reykjavik), Stockholm scores highest in two other cities (Copenhagen and Uppsala), but wins as the most favourite alternative city because of a much higher share in the Finnish and Baltic cities probably due to a smaller geographical distance. In the seven cities of Denmark, Sweden and Norway, Copenhagen is the most popular alternative destination. Looking at the visitors in Stockholm and Copenhagen, it is interesting that the two largest cities in the sample are each others' biggest competitors; 35,6% of Copenhagen's visitors considered Stockholm as an alternative destination, while 32,7% of Stockholm's visitors considered Copenhagen.

The cities that score lowest in terms of being an alternative destination to other cities are Aarhus and Tampere. For both cities, their biggest competitors are the cities closest to them. For example, 60,8% of the visitors to Aarhus considered going to Copenhagen instead. For Tampere, Helsinki is the main competitor; 51,8% of Tampere's tourists considered Helsinki.

The general conclusions are 1) that the big(ger) cities are considered as alternatives more often than small(er) cities, 2) that geographical distance is very important when it comes to choosing alternative cities and this is especially true for the small(er) cities and 3) that accessibility to the city is an important factor as well – the big(ger) competitor cities all have international airports.

NB: The table has to be read vertically, i.e. 57,3% of Bergen's tourists considered Oslo as an alternative destination, but ended up choosing Bergen. 39,9% of Oslo's tourists have considered Bergen before going to Oslo.



Reasons to go to specific city

Introduction

In this section, the tourists' reasons to go to a specific destination are described. The reasons are very different and range from city specific parameters (e.g. architecture and design of the city) and price parameters (e.g. low cost of stay) to personal reasons (e.g. previous visits). The results give an idea of what unique selling points each city has and the cities altogether have in relation to the tourists.

Results

The three most important reasons to go to a specific destination are city specific, in the sense that the atmosphere of the city (51%), the architecture and design of the city (42%) and the history of the city (39%) count to a high degree.

The reason that comes in fourth in the ranking is the wish to simply relax, stipulated by 36% of the tourists. Another personal reason comes in fifth, namely to spend time with a travel group (23%), most likely friends and family.

While recommendation is the single most important inspiration in terms of choosing destination, only 20% of the tourists say that recommendations are a specific reason to actually go to the city.

Shopping (18%) and eating & drinking (17%) are also important reasons, while night life (10%), a specific attraction (8%), a specific event in the city (7%) or a specific accommodation place (2%) are less important reasons for the tourists when deciding where to go.

Atmosphere of the city

#	CITY	SCORE
1	TAL	63,3%
2	COP	57,9%
3	STO	57,9%
4	BER	56,2%
5	RIG	56,0%
6	VIL	51,7%
7	REY	51,0%
8	HEL	50,2%
9	UPP	49,7%
10	MAL	47,0%
11	OSL	46,3%
12	AAR	42,1%
13	TUR	35,8%
14	TAM	34,8%
	ALL	51,6%

Architecture & design

#	CITY	SCORE
1	RIG	65,3%
2	TAL	56,2%
3	VIL	50,2%
4	COP	44,9%
5	BER	43,3%
6	HEL	43,1%
7	STO	42,4%
8	UPP	41,2%
9	OSL	36,3%
10	MAL	36,1%
11	REY	32,7%
12	TAM	31,3%
13	TUR	29,9%
14	AAR	24,8%
	ALL	42,7%

Tallinn tops atmosphere, Riga in architecture

When we look at the average of all, the visitors' top reason to go is "the atmosphere of the city". Hence, nine out of the fourteen cities have "the atmosphere of the city" as the top reason to go.

Tallinn is in the top when it comes to this reason, with 63% of all the Tallinn visitors agreeing on this as the main reason to go, while Copenhagen and Stockholm share the second place.

Tampere, Turku and Aarhus are the bottom three in this respect. Still, the tourists in Aarhus considered the "atmosphere of the city" as the most important reason, whereas in Tampere it is "to relax" and in Turku "the history of the city" as well as "to relax" that are the most important reasons to go.

"The architecture and design of the city" is the second most popular reason to go, regarding the average of all cities. For all cities this reason is one of the top five – Riga is the only city where architecture and design is the top reason to go. Also, Riga has the highest percentage share when it comes to this reason (65%), followed by the two other Baltic capitals. More than half of all visitors in these three cities state the architecture and design of the cities as a reason to go, while the average score is 42,7%.

History of the city

#	CITY	SCORE
1	RIG	59,5%
2	TAL	55,2%
3	VIL	53,2%
4	UPP	52,3%
5	TUR	44,1%
6	BER	39,4%
7	OSL	39,0%
8	STO	38,8%
9	REY	37,1%
10	COP	32,3%
11	HEL	31,8%
12	TAM	29,9%
13	MAL	28,6%
14	AAR	25,7%
	ALL	39,8%

To relax

#	CITY	SCORE
1	REY	48,5%
2	TAM	42,8%
3	TUR	42,6%
4	VIL	42,4%
5	RIG	41,0%
6	HEL	38,9%
7	MAL	38,6%
8	TAL	38,2%
9	COP	37,3%
10	OSL	37,0%
11	STO	30,5%
12	UPP	30,2%
13	BER	29,6%
14	AAR	26,7%
	ALL	37,2%

Spend time with group

#	CITY	SCORE
1	TUR	31,4%
2	REY	27,7%
3	COP	25,5%
4	RIG	25,4%
5	TAM	24,9%
6	AAR	24,8%
7	HEL	24,2%
8	UPP	24,1%
9	OSL	23,8%
10	STO	22,1%
11	TAL	20,0%
12	MAL	17,4%
13	VIL	16,7%
14	BER	11,3%
	ALL	22,9%

The reason for Riga is history – Reykjavik to relax

The reason to go to Riga is history

The third most popular reason to go for all tourists in all cities is the “history of the city”, with four out of ten visitors stating this as a reason to go. Looking at the cities separately, this reason comes in on one of the first four places for all cities. Three cities have their history as the most important reason to go, namely Vilnius, Uppsala and Turku (ranked 3, 4 and 5). Riga and Tallinn are in the top of the ranking, while Aarhus, Malmo and Tampere are in the bottom.

Reykjavik tops on relaxation as a reason

While the first three reasons to visit a certain destination are all specific for each city, the fourth and fifth most popular reason to go is related to the visitors themselves; number four reason in the ranking is simply to relax – 37% of all visitors stating this.

Reykjavik holds the first place in this respect with almost half of the visitors saying they are in the city simply to relax. Tampere and Turku also score a high ranking, while Aarhus, Bergen and Uppsala are in the low end.

People go to Turku to hang out with friends and family

The number five reason to go to a city is to spend time with travelling companions.

This reason is stated by app. 23% of all visitors – Turku is ranked in top with 31% of all visitors coming to spend time with family, friends or the like, while Bergen is ranked lowest with a share of app. 11%.

Other reasons to go

City	Recomm.	Shopping	Visit peop.	Eat&drink	Meet local	Pre. visit	Night life	Transp.	Attract.	Event
COP	18,8%	23,5%	14,4%	19,3%	17,6%	16,6%	**13,9%**	6,3%	9,5%	8,1%
AAR	18,3%	24,3%	20,8%	17,8%	18,8%	11,9%	16,8%	5,9%	11,4%	**13,9%**
MAL	14,7%	**28,4%**	17,2%	**26,9%**	11,2%	**19,4%**	8,0%	15,2%	6,0%	7,5%
UPP	18,6%	14,6%	23,6%	12,1%	13,1%	16,1%	**5,0%**	3,0%	10,6%	13,1%
STO	19,6%	23,5%	21,1%	17,0%	14,8%	19,1%	11,2%	7,2%	8,3%	6,0%
BER	**33,0%**	**7,4%**	**10,3%**	**8,9%**	12,3%	12,3%	6,9%	**3,0%**	**15,8%**	**3,0%**
OSL	22,4%	15,4%	17,1%	14,6%	17,8%	15,1%	8,5%	5,8%	8,5%	5,6%
TAM	**13,4%**	18,9%	**25,9%**	16,9%	13,4%	10,9%	8,0%	10,4%	11,4%	9,5%
TUR	15,2%	16,2%	24,5%	19,1%	**6,9%**	14,2%	7,8%	5,9%	14,7%	9,8%
HEL	18,2%	16,4%	22,1%	15,4%	**22,5%**	12,5%	9,6%	4,9%	6,9%	5,7%
REY	25,7%	16,8%	14,4%	10,9%	14,9%	**10,4%**	10,9%	9,9%	13,9%	6,4%
TAL	21,5%	20,0%	10,9%	23,8%	19,2%	13,9%	12,4%	11,6%	3,3%	3,8%
RIG	23,4%	9,0%	11,8%	16,6%	18,1%	10,8%	11,1%	**16,6%**	**2,0%**	4,5%
VIL	15,8%	8,9%	22,2%	17,2%	22,2%	11,8%	10,8%	7,4%	3,0%	**3,0%**
ALL	19,8%	18,3%	17,8%	17,4%	16,6%	14,6%	10,3%	8,2%	8,1%	6,7%

Other reasons to go

The first five reasons are the most popular but the visitors have a multitude of reasons to go to the different cities.

“Recommendations” is a popular reason with app. 20% of all visitors stating this as an important reason. The visitors in Bergen follow recommendations to a very high extent (33%). Reykjavik and Riga are also popular places because other people told them to go there.

“Shopping” is an important reason to go to Malmo (28%), but also Aarhus and Copenhagen show high scores in this aspect.

For Tampere’s visitors “a visit to people they know” is an important reason to come (26%). The same goes for visitors in other cities like Turku, Uppsala and Vilnius.

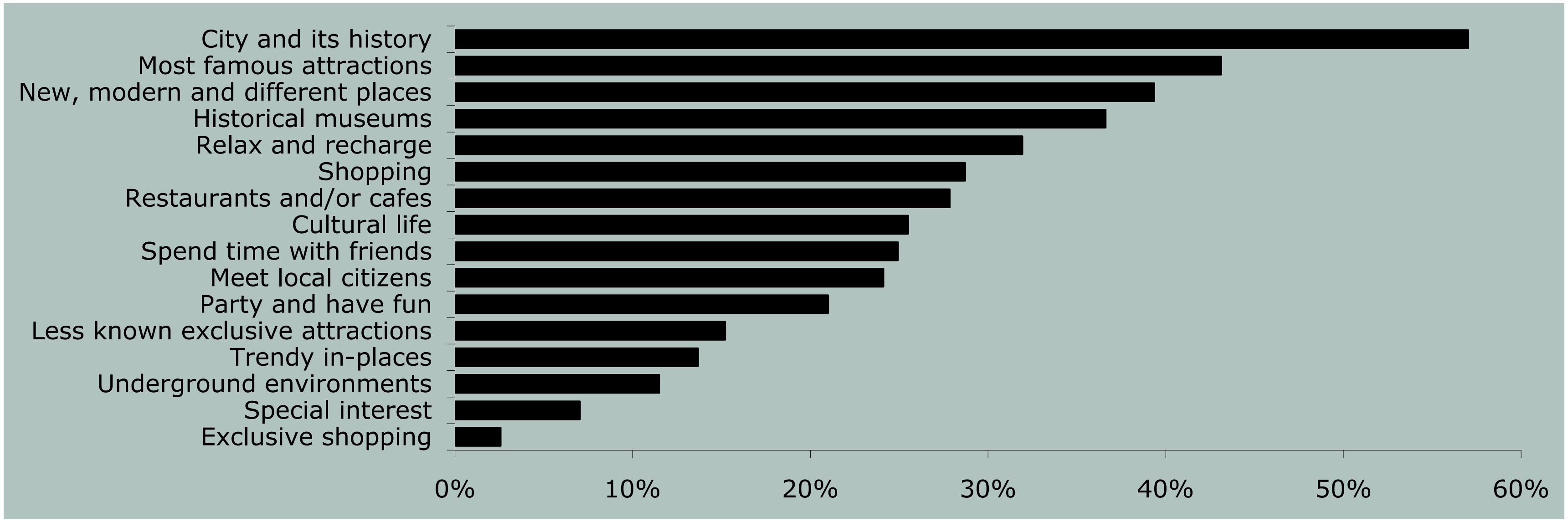
A large share of Malmo’s visitors come to eat and drink (27%).

The visitors in Helsinki wish to meet the locals more than the visitors in any of the other cities (22,5%).

In Malmo, almost 20% of the visitors come specifically because of a previous visit.

Aarhus has the night life as a great attraction – app. 17% of Aarhus’ visitors come to experience the night life of the city.

Riga’s as well as Tallinn’s visitors state low cost as a reason to visit the city.



Tourists motivations to experience (what they want to do)

Introduction

In the survey the tourists were asked to tick off as many of the 16 different motivations to experience the city as suited their needs and desires. These motivations are anything from “I want to know more about the city and its history” (most popular motivation) to “I want to party and have fun” (eleventh most popular motivation). The answers give an idea of what the tourists want to experience while they are actually in the city –at the same time they give an idea of what experiences the cities should highlight.

Results

57% of all tourists want to know more about the city and its history when they are there, by making it *the* most important motivation for many tourists and many cities.

The second highest share relates to the statement ”I want to see the most famous attractions”, which was ticked off by 43% of all the tourists.

While most tourists want to know more about the city and its history, 39% say they “want to see places and sights that are new, modern and different”. But going to historical museums is also important to many – this is a motivation for 37% of all tourists.

Other motivations of less importance yet equally important to the tourists that actually search for that specific activity, include shopping (29%), experiencing the cultural life (26%) and partying and having fun (21%).

Know more about city history

#	CITY	SCORE
1	RIG	74,8%
2	VIL	68,5%
3	TAL	64,9%
4	UPP	63,7%
5	HEL	60,9%
6	REY	58,5%
7	OSL	58,3%
8	STO	57,1%
9	BER	56,5%
10	TAM	54,6%
11	TUR	53,0%
12	COP	52,2%
13	MAL	50,4%
14	AAR	46,0%
	ALL	58,7%

See the famous attractions

#	CITY	SCORE
1	RIG	63,6%
2	BER	56,0%
3	REY	50,2%
4	UPP	48,2%
5	VIL	47,3%
6	COP	46,5%
7	HEL	42,2%
8	OSL	41,3%
9	TAL	41,0%
10	STO	41,0%
11	TAM	40,3%
12	AAR	36,6%
13	MAL	35,8%
14	TUR	35,1%
	ALL	44,3%

See new, modern places

#	CITY	SCORE
1	HEL	49,3%
2	COP	47,1%
3	MAL	46,5%
4	REY	43,5%
5	AAR	42,1%
6	OSL	41,8%
7	BER	41,5%
8	STO	39,7%
9	VIL	38,9%
10	TAM	37,8%
11	RIG	37,2%
12	TUR	27,7%
13	TAL	27,3%
14	UPP	24,4%
	ALL	40,5%

Visit historical museums

#	CITY	SCORE
1	UPP	56,5%
2	RIG	46,1%
3	OSL	45,0%
4	STO	42,9%
5	REY	42,0%
6	AAR	39,1%
7	VIL	38,4%
8	COP	35,1%
9	BER	34,5%
10	TAL	32,7%
11	HEL	32,3%
12	TUR	30,7%
13	TAM	27,6%
14	MAL	24,7%
	ALL	37,7%

Tourists want to know more about city history

Tourists want to know the Baltic cities' history

When tourists visit the three Baltic cities they plan to visit historical sights and the old city. Tourists in Aarhus, Malmo and Copenhagen do not plan to visit this kind of sights to a similarly high extent. As much as 74% of Riga's tourists want to "know more about the city and its history", closely followed by Vilnius and Tallinn.

Riga is known for famous attractions

Concerning visits to famous attractions all the non-capitals are ranked in the lower end of the scale – only exceptions are Bergen and Uppsala which both have a strong profile in terms of famous attractions. Riga has the highest score, closely followed by Bergen, Reykjavik and Uppsala.

Modern places top in Helsinki, Copenhagen & Malmo

Opposite to the ranking related to wanting "to know more about the city and its history", the three Baltic capitals show low scores when it comes to the tourists' motivation to "see modern, new and different places". Helsinki, Copenhagen and Malmo score high on this parameter.

Uppsala's historical museums are sought for

The fourth most popular motivation is to visit the city's historical museums – in Uppsala, the score is significantly higher than for all other cities, namely 57%. Compared to another Swedish city, Malmo, this is more than twice as big a share.

Relax and recharge

#	CITY	SCORE
1	RIG	40,2%
2	TAM	38,3%
3	TUR	38,1%
4	HEL	37,9%
5	REY	36,2%
6	UPP	34,2%
7	VIL	32,5%
8	TAL	31,4%
9	STO	31,2%
10	MAL	30,9%
11	COP	30,6%
12	OSL	27,8%
13	BER	27,5%
14	AAR	26,2%
	ALL	32,8%

Do shopping in general

#	CITY	SCORE
1	AAR	39,6%
2	MAL	37,7%
3	TAM	36,7%
4	HEL	34,6%
5	COP	33,4%
6	STO	32,4%
7	REY	32,4%
8	UPP	27,5%
9	TUR	26,7%
10	TAL	26,0%
11	RIG	26,0%
12	OSL	20,1%
13	BER	18,0%
14	VIL	16,3%
	ALL	29,5%

Attractive restaurants/cafes

#	CITY	SCORE
1	RIG	42,2%
2	AAR	36,6%
3	TAL	35,6%
4	TUR	35,1%
5	VIL	31,5%
6	UPP	30,6%
7	MAL	29,9%
8	TAM	29,1%
9	COP	28,0%
10	HEL	26,1%
11	REY	26,1%
12	STO	24,3%
13	OSL	19,4%
14	BER	17,0%
	ALL	28,6%

Go to theatres, art exh. etc.

#	CITY	SCORE
1	AAR	37,1%
2	RIG	31,6%
3	BER	29,5%
4	STO	28,4%
5	COP	28,2%
6	REY	26,1%
7	OSL	26,0%
8	HEL	25,9%
9	VIL	24,6%
10	UPP	23,8%
11	TAM	23,5%
12	TAL	23,4%
13	MAL	19,5%
14	TUR	15,8%
	ALL	26,2%

Relaxing in Riga and shopping in Aarhus

Relax and recharge in Riga, Tampere and Turku

To “relax and recharge” is an important motivation for many tourists in all cities – the relative difference is not too big. But Riga, Tampere and Turku still come in as the top-three, well above the average for all cities.

Apparently, to relax and recharge is less important in Oslo, Copenhagen and Stockholm, just as it seems to be the case in Aarhus, Bergen and Malmo.

Aarhus and Malmo offer good shopping

Aarhus and Malmo both have a share above average when it comes to tourists looking for shopping – Vilnius, Bergen and Oslo score less than average in this respect.

Going to restaurants is popular in Riga

Most tourists of course go to restaurants and cafes once in a while, but for 29% going to restaurants and cafes is an important motivation while they are in the city.

This share is highest in Riga (42%) and Aarhus (37%) while the two Norwegian cities, Bergen and Oslo, have a smaller share of tourists motivated to go out and eat.

Aarhus attracts cultural audience

Aarhus has the highest share of tourists who want to visit a theatre, an art exhibition or a similar cultural activity. 37% of Aarhus’ tourists has this as a motivation compared to the total average at 26%.

Meet local citizens

#	CITY	SCORE
1	VIL	37,9%
2	HEL	31,9%
3	RIG	30,3%
4	AAR	25,7%
5	REY	25,1%
6	UPP	23,8%
7	COP	23,1%
8	TAM	23,0%
9	STO	22,4%
10	TAL	22,1%
11	OSL	22,0%
12	BER	22,0%
13	TUR	20,3%
14	MAL	19,0%
	ALL	24,8%

Want to party & have fun

#	CITY	SCORE
1	AAR	34,7%
2	HEL	23,9%
3	COP	23,5%
4	RIG	23,2%
5	TAL	22,9%
6	TUR	22,8%
7	TAM	21,9%
8	VIL	20,2%
9	STO	20,2%
10	OSL	19,6%
11	MAL	19,2%
12	BER	18,0%
13	REY	15,9%
14	UPP	14,0%
	ALL	21,6%

Less-known attractions

#	CITY	SCORE
1	RIG	22,1%
2	REY	19,8%
3	HEL	17,4%
4	STO	17,1%
5	TAL	16,6%
6	COP	15,7%
7	TUR	15,3%
8	TAM	14,3%
9	OSL	13,7%
10	BER	13,5%
11	VIL	13,3%
12	AAR	12,4%
13	UPP	11,9%
14	MAL	10,4%
	ALL	15,6%

Go to trendy in-places

#	CITY	SCORE
1	COP	18,1%
2	HEL	16,9%
3	REY	15,0%
4	AAR	14,9%
5	MAL	14,0%
6	RIG	14,0%
7	STO	14,0%
8	OSL	12,8%
9	TAL	12,5%
10	TAM	12,2%
11	VIL	11,3%
12	TUR	10,9%
13	BER	10,5%
14	UPP	10,4%
	ALL	14,1%

Tourists want to party in Aarhus

Tourists in Vilnius want to meet locals

25% of the tourists are motivated to meet and talk to locals but this share is much higher in Vilnius (38%) and also Helsinki (32%) and Riga (30%).

In the lower end of the scale, people are to a lesser degree coming to Malmo (19%) and Turku (20%) to meet locals.

Come to Aarhus to party and have fun

As many as 35% of Aarhus' tourists are motivated to party and have fun – much more than the average of 22%. Helsinki and Copenhagen score a much lower share, but come in at second and third place.

Less-known attractions in Riga and Reykjavik

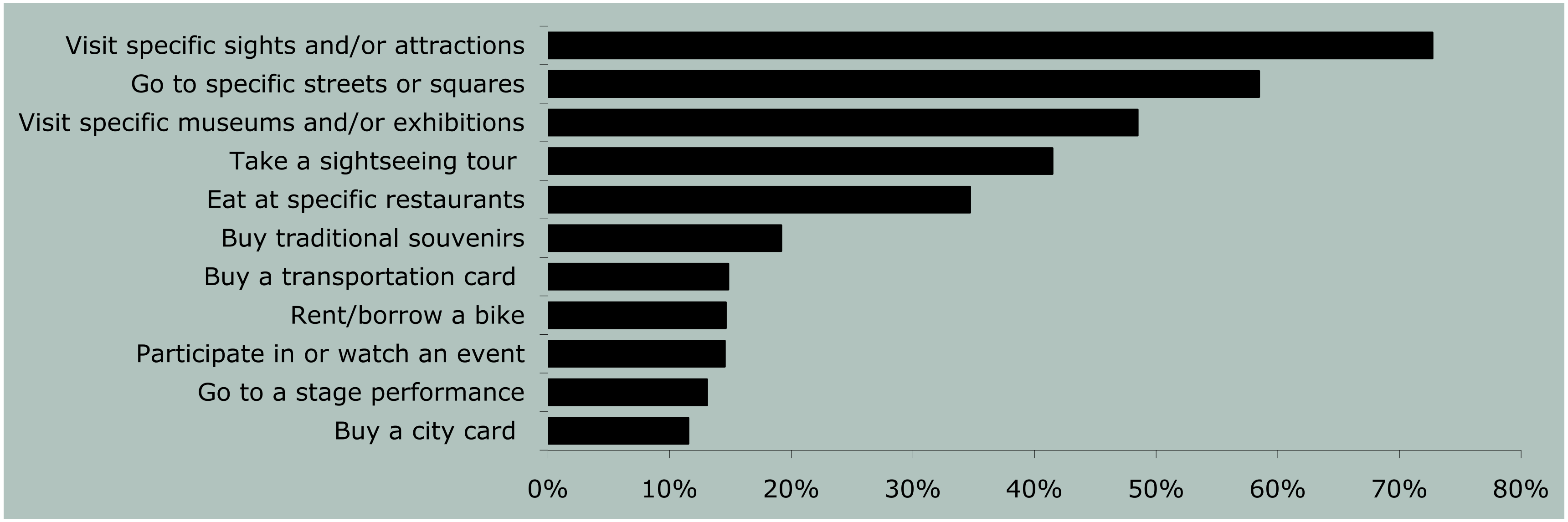
One out of six tourists (16%) say that they want to see less-known and exclusive attractions while they are in the city. The share is highest in Riga (22%) and Reykjavik (20%) and lowest in Malmo (10%) and Uppsala (12%).

This motivation does not discriminate as much as other motivations between the cities.

Copenhagen's trendy in-places is worth a visit

As with the preceding motivational parameter, going to trendy in-places is important to a smaller share of tourists (14%) and does not differentiate that much from city to city.

Nevertheless, Copenhagen scores above average (18%) and Uppsala scores below (10%) at top and bottom of the ranking.



What tourists actually do (specific activities)

Introduction

The tourists were asked to indicate which of the 11 specific activities listed they would attend while they were in the city. The activities are more specified than the motivations from the previous section, e.g. to visit specific sights, eat at specific restaurants, visit specific museums (which they were asked to write in a text box), buy a city card or rent a bike.

Results

The most popular activity, ticked off by 73% of all the tourists, is to visit specific sights and attractions. This rather touristy activity exceeds the second most popular activity by far, namely to visit specific streets, squares or neighbourhoods in the city (59%).

The third most popular activity, equally touristy, activity is to visit a specific museum, exhibition or the like. 49% of all tourists plan to go to a specific museum or a similar activity.

42% of all tourists plan to go on an organized sightseeing tour, either by bus, boat or the like. This seems like a very large share – but it can probably be explained by the fact that the tourists were all recruited in the tourism information centre, where many tourists come to get information on sightseeing tours, pick up a map or organize other touristy things.

Quite a large share of all the tourists have already planned to visit a specific restaurant, namely 35%.

Attending other activities count buying traditional souvenirs (19%), participating in or watching an event (15%) and buying a city discount card (12%) – none of these activities are sought for by many tourists.

Visit specific sights

#	CITY	SCORE
1	RIG	84,3%
2	UPP	81,2%
3	STO	74,3%
4	BER	74,3%
5	TAL	74,0%
6	TAM	73,8%
7	HEL	73,2%
8	COP	73,0%
9	REY	72,7%
10	VIL	71,2%
11	OSL	70,6%
12	TUR	68,3%
13	AAR	62,5%
14	MAL	61,7%
	ALL	72,7%

Go to specific streets/squares

#	CITY	SCORE
1	RIG	75,9%
2	HEL	60,3%
3	TAL	60,3%
4	COP	59,9%
5	MAL	58,5%
6	VIL	58,1%
7	STO	57,8%
8	REY	57,6%
9	UPP	57,4%
10	OSL	54,9%
11	TAM	54,5%
12	BER	53,5%
13	AAR	50,0%
14	TUR	43,2%
	ALL	58,5%

Visit specific museums/exh.

#	CITY	SCORE
1	UPP	61,9%
2	OSL	58,6%
3	STO	55,9%
4	RIG	55,8%
5	REY	54,6%
6	MAL	47,2%
7	TUR	46,8%
8	COP	46,5%
9	AAR	45,5%
10	BER	45,2%
11	TAL	41,1%
12	HEL	39,4%
13	VIL	39,3%
14	TAM	33,9%
	ALL	48,5%

The tourists know what they want to see and do

As the previous page showed, a large number of tourists have planned to see specific sights as well as museums in advance – they have also selected specific streets or squares of interest in the city.

Riga's tourists go for sights

While 73% of all tourists have planned to visit specific sights and attractions, as many as 84% of Riga's tourists have done so. Uppsala, Stockholm and Bergen also score above average in this aspect. In Malmo and Aarhus, the number is much lower – 62% and 63%, respectively.

Riga's tourists know the streets of the city

It is true for all the cities that tourists want to wander around on their own, experiencing specific streets or squares.

Riga is the city where most tourists state that they want to go and visit specific streets and squares in the city – and can actually name these. Turku and Aarhus have a lower share of tourists who wish to do this.

Uppsala and Oslo have good museums

A larger share of the tourists plan to visit specific museums in Uppsala (62%) and Oslo (59%) compared to the average of all (49%). In the other end of the scale, Tampere and Vilnius have few tourists who know that they want to go to specific museums.

Take a sightseeing tour

#	CITY	SCORE
1	STO	50,9%
2	RIG	50,8%
3	BER	47,0%
4	HEL	45,9%
5	COP	43,6%
6	REY	42,4%
7	TAM	41,4%
8	OSL	40,0%
9	UPP	35,0%
10	MAL	34,9%
11	TAL	34,8%
12	TUR	32,7%
13	VIL	31,3%
14	AAR	24,5%
	ALL	41,5%

Buy traditional souvenirs

#	CITY	SCORE
1	REY	30,7%
2	RIG	28,2%
3	VIL	25,8%
4	HEL	25,6%
5	UPP	20,8%
6	BER	20,3%
7	TAL	18,1%
8	OSL	17,5%
9	STO	15,9%
10	TAM	15,2%
11	TUR	15,1%
12	AAR	15,0%
13	MAL	13,4%
14	COP	13,0%
	ALL	19,2%

Rent/borrow a bike

#	CITY	SCORE
1	AAR	26,0%
2	COP	25,2%
3	TUR	17,6%
4	UPP	16,8%
5	STO	16,7%
6	HEL	14,9%
7	OSL	13,5%
8	MAL	12,9%
9	VIL	12,6%
10	TAL	12,3%
11	RIG	7,9%
12	TAM	7,9%
13	REY	5,4%
14	BER	3,5%
	ALL	14,6%

Buy a city (discount) card

#	CITY	SCORE
1	STO	19,1%
2	OSL	15,4%
3	COP	13,5%
4	AAR	13,0%
5	HEL	12,3%
6	TAL	11,2%
7	REY	11,2%
8	BER	10,9%
9	MAL	10,2%
10	RIG	6,1%
11	UPP	5,6%
12	TUR	5,5%
13	TAM	4,7%
14	VIL	2,5%
	ALL	11,5%

Tourists still do touristy things

Sightseeing tours do well in Stockholm

Despite the fact that there is an increased tendency to explore the city on one’s own hand, a large number of tourists in all the cities choose to go on a sightseeing tour (42%).

Yet, going on an organized tour could also be a way for the tourists to obtain an overview of the city before going out on their own. Like this, a sightseeing tour could work as inspiration for further activities and not as an isolated experience.

Stockholm is the city that has the largest share of tourists who want to go sightseeing (51%) while Aarhus has a considerable lower share (25%).

Traditional souvenirs most popular in Reykjavik

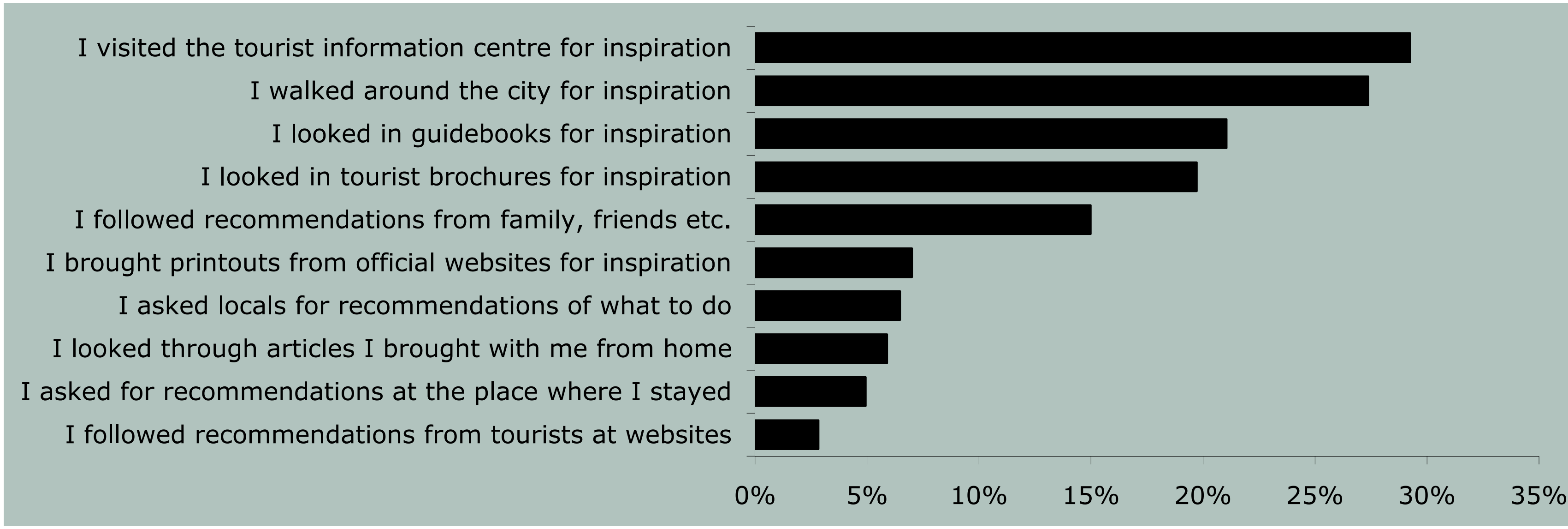
Almost one out of three tourists in Reykjavik (31%) want to buy some kind of traditional souvenir to bring home from Iceland. Compared to the average (19%) and especially to Copenhagen (13%) this is a popular activity in Reykjavik.

Biking is first and foremost a Danish thing

Not surprisingly, the two Danish cities Aarhus and Copenhagen has significantly more tourists who want to go bicycling (26% and 25%, respectively). The offer is also available in these cities. In cities like Bergen, Reykjavik and Tampere the share of tourists wanting to rent a bike is much smaller. Perhaps an explanation could be that the demand is the same in all cities but the supply is greater in some cities.

City cards most popular in three Scandinavian capitals

The three Scandinavian capitals, Stockholm, Oslo and Copenhagen, show the largest number of purchased city cards. Yet, we must conclude that compared to the number of tourists who want to visit specific sights, a relatively small number visit these attractions with a discount card. This could mean that tourists want to experience the city in their own pace and do not want to feel obliged to visit certain attractions on the basis of written recommendations. Another conclusion could be that the tourists do not find the value for money high enough.



How do the tourists make decisions?

Introduction

After returning home the tourists received the second part of the questionnaire. The following results show what the tourists ended up being inspired by during their vacation.

This gives an idea of how the tourists make decisions while they walk around the city. Do they use guide books, locals, other tourists or something else to make decisions on what to do?

Results

While all tourists were recruited at the tourist information centre, only 29% say that they visited the centre to decide what to do. Hence, it seems that many of the tourists just come to pick up a map or some brochures and not to get first-hand inspiration.

27% of the tourists say they just walk around the city for inspiration while 21% look in guidebooks to find out what to do.

20% use tourist brochures as inspiration. Looking at recommendations in total, app. 30% of the tourists follow tips from other tourists (3%), locals (7%), staff (5%) or family/friends (15%).

In general, tourists do not seem to be very conscious about the way they decide what to do. They probably just follow a random route and see what pops up around the next corner.

Visited tourist information

#	CITY	SCORE
1	REY	43,3%
2	UPP	36,5%
3	BER	33,8%
4	TAM	33,5%
5	COP	30,8%
6	AAR	30,4%
7	HEL	29,5%
8	STO	29,1%
9	TAL	27,3%
10	MAL	26,6%
11	RIG	26,6%
12	OSL	26,3%
13	TUR	25,2%
14	VIL	20,1%
	ALL	29,2%

Walked around city

#	CITY	SCORE
1	UPP	36,0%
2	TAL	33,3%
3	REY	31,7%
4	RIG	31,6%
5	MAL	30,1%
6	HEL	29,1%
7	BER	28,9%
8	AAR	28,0%
9	TAM	27,1%
10	COP	25,3%
11	TUR	25,2%
12	VIL	24,5%
13	OSL	22,5%
14	STO	20,7%
	ALL	27,4%

Looked in guide books

#	CITY	SCORE
1	REY	41,8%
2	RIG	28,6%
3	BER	26,0%
4	TAM	22,2%
5	TAL	22,0%
6	OSL	21,7%
7	HEL	21,1%
8	COP	19,9%
9	STO	19,1%
10	UPP	19,0%
11	VIL	18,6%
12	TUR	15,8%
13	AAR	13,5%
14	MAL	11,2%
	ALL	21,1%

Looked in tourism brochures

#	CITY	SCORE
1	REY	30,8%
2	TAM	26,1%
3	UPP	22,5%
4	STO	21,7%
5	TAL	20,5%
6	MAL	20,4%
7	HEL	20,3%
8	AAR	20,3%
9	RIG	20,1%
10	TUR	18,8%
11	BER	18,6%
12	COP	16,9%
13	OSL	16,5%
14	VIL	7,4%
	ALL	19,7%

How do the tourists make decisions?

Tourist information helps decide in Reykjavik

43% of Reykjavik's visitors state that they visited the tourist information centre to decide what to do while they were in the city. This is significantly more than the average and also significantly more than Uppsala and Bergen which take second and third place.

As comparison, 20% of Vilnius' tourists come to the tourist information centre to get inspiration in their decision making.

Walking around in Uppsala

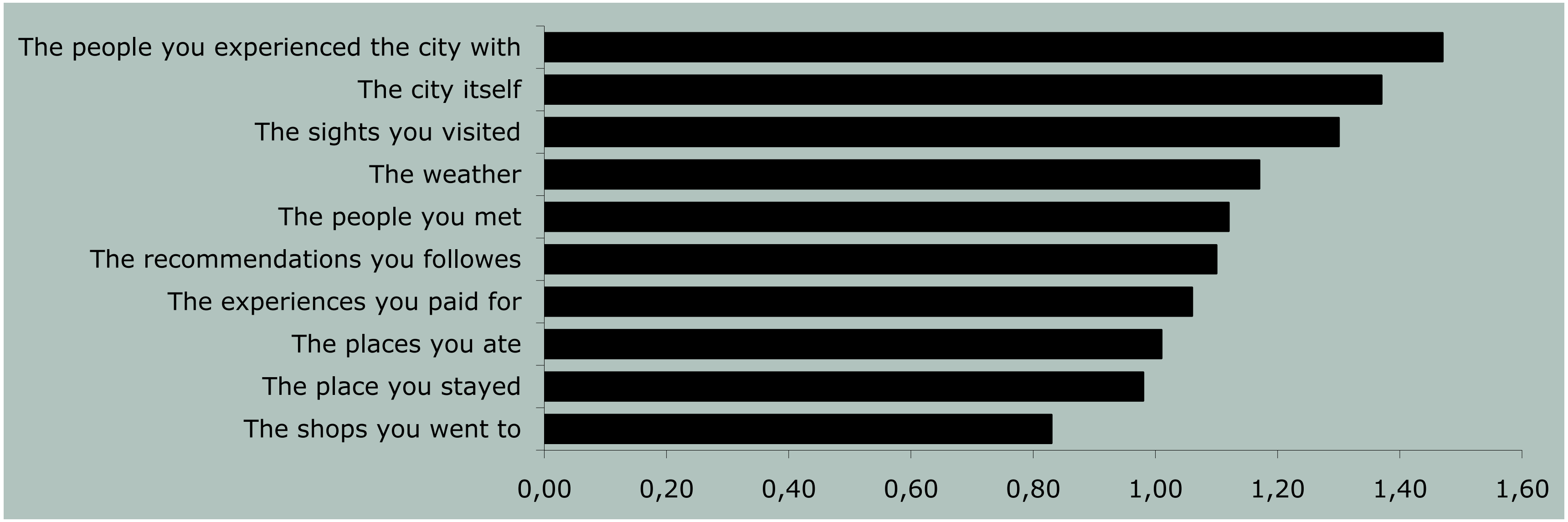
Just walking around in the city were a great inspiration for all the tourists when deciding what to do or see in the city. The average is 27,4 % and it is the smaller cities of Uppsala, Tallinn and Reykjavik that rank highest on this parameter.

Guidebooks guide the way in Reykjavik

The tourists in Reykjavik use guidebooks to a much greater extend that the tourist in all the other cities. But also Riga and Bergen are well above the average at 21,1%.

Brochures are also relevant in Reykjavik

19,7% of all the tourists say that they have used tourism brochures to get inspiration about what to do in the cities. Again it is the tourists in Reykjavik who mostly use this source for inspiration, whereas only 7,4% of the visitors in Vilinus do the same.



Satisfaction with holiday elements

Introduction

In the second part of the questionnaire, the tourist were asked how they would evaluate different elements in terms of their satisfaction with their holiday. The graph above shows the result for all the cities in average. The tourist were asked to answer on a scale from -2 to +2. -2 being 'very dissatisfied' and +2 being 'very satisfied'. On the following pages the cities are ranked on all the parameters.

Results

The visitors are most of all satisfied with the people they experienced the city with. Naturally, the cities can not do much about this fact.

The city itself is the second most satisfying element, while the sights that the tourist visited come in on a third place.

Interestingly, the weather in the cities performs better than e.g. the experiences they paid for (some kind of more or less designed experiences, e.g. a visit to an amusement park, a museum, a stage performance or similar). But also, the weather is more satisfying than the places people went to eat, sleep and buy things.

The people you experienced the city with

#	CITY	SCORE
1	UPP	1,58
2	BER	1,57
3	VIL	1,55
4	RIG	1,54
5	TAL	1,54
6	MAL	1,49
7	AAR	1,49
8	REY	1,48
9	OSL	1,46
10	COP	1,44
11	HEL	1,44
12	STO	1,42
13	TAM	1,38
14	TUR	1,38
	ALL	1,47

The city itself

#	CITY	SCORE
1	TAL	1,57
2	UPP	1,55
3	BER	1,48
4	VIL	1,44
5	STO	1,43
6	RIG	1,42
7	MAL	1,42
8	TAM	1,41
9	COP	1,37
10	HEL	1,35
11	AAR	1,27
12	OSL	1,24
13	REY	1,20
14	TUR	0,99
	ALL	1,37

The sights you visited

#	CITY	SCORE
1	UPP	1,47
2	STO	1,39
3	RIG	1,38
4	VIL	1,38
5	BER	1,37
6	OSL	1,35
7	TAL	1,34
8	MAL	1,30
9	REY	1,28
10	HEL	1,25
11	TAM	1,25
12	COP	1,24
13	AAR	1,11
14	TUR	1,03
	ALL	1,30

High satisfaction with the city itself

The travel group is better than all the rest

Most of the tourists have chosen their travelling companions themselves – assuming this, it is not a surprise that the satisfaction in this area is great. The level of satisfaction is quite similar from city to city. Of course, the tourism organisations can not do much about this fact besides taking pleasure in the fact that people seem to enjoy their trip.

Tallinn is the most satisfying city

When it comes to the city itself – the atmosphere the tourists experienced in the city – Tallinn and Uppsala are in the top.

All the cities get a ranking of 1 or more which means that all the cities are doing better than just satisfying.

Uppsala and Stockholm sights are best

In most of the cities the tourists were more than satisfied with the sights they saw during their stay. Especially in Uppsala and Stockholm, the tourists are very satisfied with the sights they decided to see.

Even though all cities perform well in this parameter, the tourists in Turku and Aarhus were not too satisfied with these cities' sights.

The weather

#	CITY	SCORE
1	RIG	1,66
2	HEL	1,59
3	TUR	1,49
4	VIL	1,43
5	TAL	1,42
6	TAM	1,31
7	COP	1,16
8	STO	1,13
9	UPP	1,01
10	REY	0,94
11	BER	0,91
12	MAL	0,89
13	OSL	0,76
14	AAR	0,43
	ALL	1,17

The people you met

#	CITY	SCORE
1	UPP	1,34
2	MAL	1,26
3	TAM	1,24
4	BER	1,24
5	HEL	1,19
6	TUR	1,19
7	REY	1,18
8	STO	1,17
9	AAR	1,16
10	COP	1,15
11	OSL	1,00
12	TAL	0,90
13	VIL	0,87
14	RIG	0,86
	ALL	1,12

The recommendations you followed

#	CITY	SCORE
1	BER	1,23
2	UPP	1,19
3	TAL	1,19
4	REY	1,17
5	RIG	1,17
6	STO	1,12
7	VIL	1,11
8	TAM	1,09
9	MAL	1,09
10	HEL	1,08
11	COP	1,05
12	OSL	1,04
13	AAR	0,98
14	TUR	0,92
	ALL	1,10

Nordic weather is satisfying

Huge difference in satisfaction with weather

Unfortunately its not possible for the cities to do anything about the weather – and of course, what is good and what is bad weather is very subjective.

Hence, what is important is to make sure that there are good possibilities to experience different things no matter the weather conditions.

The tourists were most satisfied with the weather in Riga and Helsinki (and other cities in Finland and the Baltic countries) whereas Aarhus, Oslo and Malmo are well below the average in this respect.

Other tourists and locals are best in Uppsala

The tourist were satisfied with the people they met in Uppsala and Malmo but not that satisfied with the local people and other tourists in Riga, Vilnius and Tallinn.

Recommendations did the difference in Bergen

Most of the tourists in all the cities were more than satisfied with the recommendations they followed during their stay in the cities. The difference between top and bottom is rather small, but still, the tips that tourists followed in Bergen were more satisfying than in any other city.

The experiences you paid for

#	CITY	SCORE
1	UPP	1,30
2	REY	1,27
3	STO	1,16
4	MAL	1,13
5	TAM	1,11
6	VIL	1,11
7	TAL	1,10
8	RIG	1,06
9	COP	1,00
10	AAR	1,00
11	BER	1,00
12	OSL	0,97
13	HEL	0,94
14	TUR	0,75
	ALL	1,06

The places you ate

#	CITY	SCORE
1	UPP	1,24
2	MAL	1,23
3	VIL	1,21
4	TAL	1,19
5	TAM	1,11
6	RIG	1,10
7	AAR	1,09
8	STO	0,99
9	HEL	0,98
10	REY	0,97
11	COP	0,96
12	TUR	0,90
13	BER	0,74
14	OSL	0,67
	ALL	1,01

The place you stayed

#	CITY	SCORE
1	MAL	1,17
2	HEL	1,14
3	VIL	1,10
4	TAL	1,07
5	TAM	1,05
6	OSL	1,01
7	UPP	1,01
8	TUR	0,96
9	REY	0,95
10	RIG	0,94
11	STO	0,93
12	AAR	0,86
13	COP	0,77
14	BER	0,74
	ALL	0,98

Paid activities, food and lodging are just acceptable

Paid activities is best in Uppsala

The results are very different from city to city when it comes to the tourists' satisfaction with the experiences they paid for. Uppsala has the highest score (1,30) and Turku the lowest (0,75). This is an opportunity for the cities to enter into dialogue with the attractions where you have to pay entrance fee since it seems that a lot of tourists are not too satisfied with this holiday element.

Malmo and Uppsala serve good food

When it comes to the places the tourist ate during their holiday the differences are great. What is interesting is that all the large capital cities are below average, even though these cities are well known for their Michelin restaurants. As we have seen earlier the tourist are not that motivated to go to specific restaurants, which means that they probably just grab a bite when they feel hungry – hence, they are more likely to step into typical "tourist traps".

Accommodation is not good enough

The evaluation of the places the tourists stayed in does not show great satisfaction. The average for all cities is 0,98 which means that seven cities score below 1 – indicating that the tourist only think of the places they stayed in as acceptable. Malmo and Helsinki offer the best quality while Bergen and Copenhagen are in the bottom.

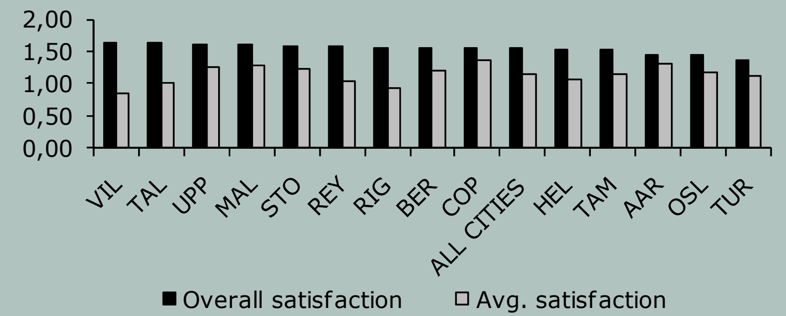
The shops you went to

#	CITY	SCORE
1	UPP	1,09
2	MAL	1,02
3	HEL	0,97
4	TAM	0,94
5	COP	0,87
6	AAR	0,85
7	TAL	0,85
8	STO	0,83
9	REY	0,79
10	BER	0,69
11	VIL	0,67
12	TUR	0,65
13	RIG	0,62
14	OSL	0,61
	ALL	0,83

Overall satisfaction

#	CITY	SCORE
1	VIL	1,65
2	TAL	1,64
3	UPP	1,62
4	MAL	1,61
5	STO	1,60
6	REY	1,60
7	RIG	1,57
8	BER	1,57
9	COP	1,56
10	HEL	1,54
11	TAM	1,54
12	AAR	1,46
13	OSL	1,46
14	TUR	1,38
	ALL	1,55

Overall satisfaction vs. Average satisfaction



General satisfaction is better than specific elements

Swedish shops are most satisfying

Shopping in Uppsala and Malmo is more satisfying than shopping in Oslo and Riga. The overall picture is, however, that shopping scores low on the satisfaction scale –hence, not a great part of the tourists considered shopping as a specific reason to go.

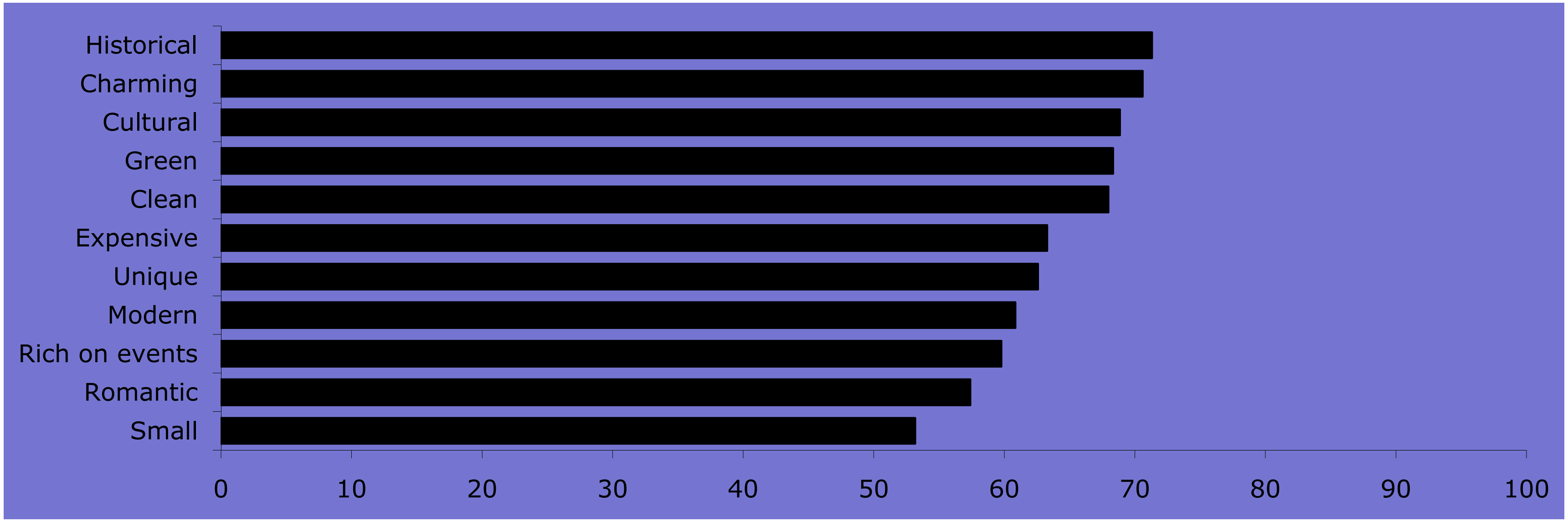
Overall satisfaction is highest in Vilnius

Besides asking the tourist about their satisfaction with different holiday elements we also asked about their overall satisfaction.

In the diagram above we compare the average satisfaction of the different holiday elements with the tourists' overall satisfaction with their holiday. There is an obvious tendency showing greater overall satisfaction than satisfaction with more specific elements.

This indicates that the tourists go home with a good feeling and hopefully recommend the city to friends and relatives.

Vilnius is the city that scores highest in terms of the overall satisfaction with the holiday.



How do you expect the city to be like?

Introduction

Tourists were asked to indicate on a scale from 0 to 100 how much they either agree or disagree with certain values about the city they visited.

The scale ranges from 0 to 100, which means that the closer to 0 the more the tourists disagree with that particular statement, whereas the closer to 100 the more the tourists agree with the question.

In the second part of the questionnaire, the same question were posed again to see if the tourists' initial perception had changed or not after the stay. Since the average scores did not change significantly, we decided to include the values based on the first part of the questionnaire.

Results

The value that tourists think characterise the cities the best is "historical" (71,3), closely followed by "charming" (70,6) and "cultural" (68,9).

Looking at the values that tourists use to a lesser degree is "small". Also, "romantic" and "rich on events" are in the bottom in terms of scores.

A common characteristic for all statements is that there is a significant difference between the cities which score highest and lowest. The smallest difference in absolute number is within the value "cultural" (Uppsala scores 72,9 while Reykjavik scores 61,9 – a difference of 11 points). The largest difference is found for the value "expensive" where the difference is as much as 43,3 points – spanning from Reykjavik (82,3) to Vilnius (39,0).

These differences are analysed further in the following pages.

Historical

#	CITY	SCORE
1	RIG	82,26
2	UPP	81,99
3	TAL	80,44
4	VIL	79,28
5	STO	75,28
6	BER	73,55
7	COP	71,65
8	TUR	71,00
9	MAL	66,93
10	AAR	66,08
11	OSL	65,65
12	HEL	65,52
13	TAM	62,04
14	REY	56,40
	ALL	71,31

Charming

#	CITY	SCORE
1	UPP	77,49
2	BER	76,10
3	TAL	74,52
4	RIG	73,12
5	STO	72,70
6	VIL	71,84
7	COP	70,72
8	HEL	70,40
9	AAR	68,91
10	TAM	68,25
11	REY	67,37
12	MAL	66,98
13	TUR	66,86
14	OSL	65,95
	ALL	70,60

Cultural

#	CITY	SCORE
1	UPP	72,85
2	STO	72,69
3	COP	70,67
4	RIG	70,20
5	HEL	69,89
6	BER	69,46
7	OSL	68,12
8	AAR	67,70
9	TAL	67,47
10	TAM	67,03
11	VIL	66,76
12	TUR	66,07
13	MAL	65,34
14	REY	61,91
	ALL	68,85

Green

#	CITY	SCORE
1	UPP	74,95
2	HEL	73,11
3	OSL	72,53
4	TAM	71,35
5	STO	70,64
6	MAL	68,52
7	RIG	68,33
8	VIL	66,98
9	BER	66,51
10	TUR	65,57
11	AAR	64,25
12	TAL	63,43
13	COP	63,00
14	REY	60,67
	ALL	68,33

Historical Riga – charming, cultural and green Uppsala

Most historical city: Riga

Riga scores significantly higher than the average in terms of historical value – together with Uppsala, Tallinn and Vilnius. One of the tourists put it in this way: *I didn't know much about Latvia and Riga before I arrived. I visited the historical museum and learned quite a bit.*

Most charming city: Uppsala

When it comes to the city as charming we see an almost identical ranking with the romantic value (see p. 59). We can conclude that the tourists link the two values.

Uppsala has the highest score, just ahead of Bergen and Tallinn.

Most cultural city: Uppsala

The value "cultural" gets the highest ranking in Uppsala, closely followed by Stockholm and Copenhagen.

Most green city: Uppsala

Uppsala is also ranked as the most green city, closely followed by Helsinki and Oslo. As opposed to these cities, Reykjavik, Copenhagen and Tallinn are not perceived as green cities to the same degree.

Viewing a city as green must be regarded a very important issue if we consider the current climate discussions and the matching social responsibility. Green can for instance be synonym with many parks and trees in the city or an ideology e.g. eating healthy and recycling. The fact that Reykjavik gets the lowest ranking is interesting, as Iceland is known for its clean air due to a high utilisation of geothermal energy. This suggests that the word green is more associated with parks etc. than with climate issues.

Clean

#	CITY	SCORE
1	REY	76,76
2	HEL	74,45
3	UPP	71,99
4	BER	70,20
5	TAM	69,87
6	OSL	69,29
7	STO	68,30
8	MAL	68,04
9	TAL	67,42
10	TUR	65,87
11	AAR	65,21
12	RIG	65,15
13	VIL	60,94
14	COP	60,26
	ALL	67,97

Expensive

#	CITY	SCORE
1	REY	82,31
2	OSL	79,17
3	BER	76,45
4	COP	71,35
5	STO	68,57
6	HEL	68,38
7	AAR	62,58
8	TAM	54,76
9	TUR	54,70
10	UPP	54,67
11	MAL	53,78
12	RIG	46,96
13	TAL	46,75
14	VIL	39,01
	ALL	63,29

Unique

#	CITY	SCORE
1	REY	69,68
2	BER	68,31
3	STO	67,41
4	TAL	66,97
5	VIL	66,68
6	UPP	64,48
7	HEL	62,76
8	RIG	62,66
9	COP	61,29
10	TUR	59,45
11	OSL	58,67
12	TAM	57,84
13	AAR	56,16
14	MAL	56,16
	ALL	62,58

Modern

#	CITY	SCORE
1	HEL	67,39
2	REY	64,81
3	MAL	64,41
4	STO	64,21
5	COP	63,33
6	AAR	63,18
7	OSL	62,30
8	TAM	62,11
9	VIL	57,64
10	TAL	54,23
11	UPP	53,82
12	BER	52,90
13	RIG	52,65
14	TUR	52,37
	ALL	60,85

Clean, unique but expensive Reykjavik – modern Helsinki

Most clean city: Reykjavik

Reykjavik scores significantly higher than the average in this aspect, together with Helsinki and Uppsala. One of Reykjavik's visitors puts it in this way: *I didn't see any trash in the streets (contrary to other countries).*

Most expensive city: Reykjavik

Reykjavik is being valued as a clean city which is obviously positive. The city is, however, also perceived as an expensive city which a tourist commented on: *The drinks and the provisions are much more expensive than expected. But for entrees in parks we pay nothing and that is a difference with other countries.* Other expensive cities are Oslo, Bergen and Copenhagen. The three Baltic cities are, on the other hand, regarded as the least expensive cities to visit.

Most unique city: Reykjavik

Reykjavik scores high when it comes to being a unique city, closely followed by Bergen and Stockholm. Malmo, Aarhus and Tampere all get low scores in this respect.

Most modern city: Helsinki

Helsinki is ranked as the most modern city, followed by Reykjavik, Malmo and Oslo. A tourist explains the modern side of Helsinki in this way: *Lot of new styles and buildings, architecture, the food culture, the music and the sights of people.*

When we compare the ranking of the values "modern" and "historical" a clear pattern appears. The two are each other's obvious opposites, which is why almost all cities that are above average in the "modern" ranking are below average in the "historical" ranking and vice versa. Reykjavik is for instance ranked as the second-most modern city and the least historical city.

Rich on events

#	CITY	SCORE
1	STO	64,72
2	COP	64,19
3	HEL	62,14
4	AAR	60,52
5	MAL	60,18
6	TAM	59,97
7	OSL	59,29
8	BER	59,08
9	UPP	57,44
10	TUR	57,35
11	REY	55,94
12	TAL	55,29
13	RIG	54,63
14	VIL	53,34
	ALL	59,78

Romantic

#	CITY	SCORE
1	TAL	65,43
2	VIL	65,15
3	RIG	63,92
4	UPP	63,05
5	BER	62,71
6	STO	58,99
7	COP	57,09
8	TUR	57,04
9	MAL	55,69
10	HEL	54,65
11	TAM	51,56
12	AAR	51,31
13	OSL	51,20
14	REY	48,97
	ALL	57,40

Small

#	CITY	SCORE
1	REY	65,85
2	TAL	60,80
3	UPP	59,97
4	BER	58,29
5	HEL	54,51
6	OSL	54,26
7	TAM	54,09
8	VIL	53,99
9	TUR	53,59
10	AAR	52,47
11	MAL	52,30
12	RIG	52,14
13	COP	48,55
14	STO	42,67
	ALL	53,18

Eventful Stockholm, romantic Tallinn, small Reykjavik

Rich on events: Stockholm

The capitals of Stockholm, Copenhagen and Helsinki are all ranked high in terms of events in the cities. Stockholm takes first place while the three Baltic capitals get the lowest scores. There does not seem to be a connection when a city is both "rich on events" and "cultural". Cities that rank above average in terms of events do not necessarily get high scores when it comes to viewing the city as cultural. A tourist in Stockholm was even surprised to find many events: *Reading the local ads and seeing events going on around, I realized that the city had more to offer than I had expected.*

Most romantic city: Tallinn

Though getting low scores on the "rich on event" scale, the three Baltic capitals are placed in the top in terms of being more "romantic" – Tallinn wins first price. A city like Reykjavik is a less romantic destination according to their visitors.

A Tallinn tourist says it like this: *Great place to go a weekend for two. Just walking around old town through all the winding streets, enjoying the food and drinks.*

Smallest city: Reykjavik

The evaluation of a city as being small is neither positive nor negative but gives an idea of how the city is perceived by the tourists in terms of size and cosmopolitan feeling.

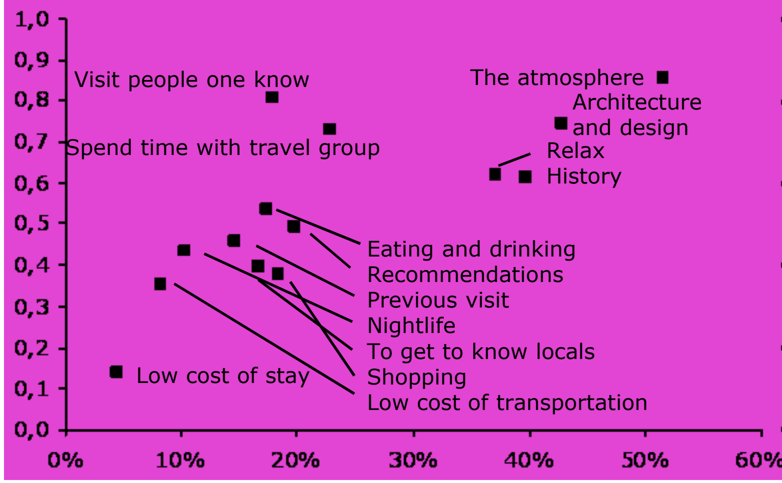
The average score for all cities is 53,18, giving the impression that the average city is perceived as somewhat medium sized. Reykjavik is perceived as the smallest city, followed by Tallinn and Uppsala. Stockholm gets the lowest score, hence suggesting that Stockholm is perceived as a larger city compared to the rest.

A statement from a tourist in Reykjavik gives an idea of both the positive and negative side of being perceived as a small city: *I just assumed it would be bigger. The heart of the city is a very small area but this is charming.*

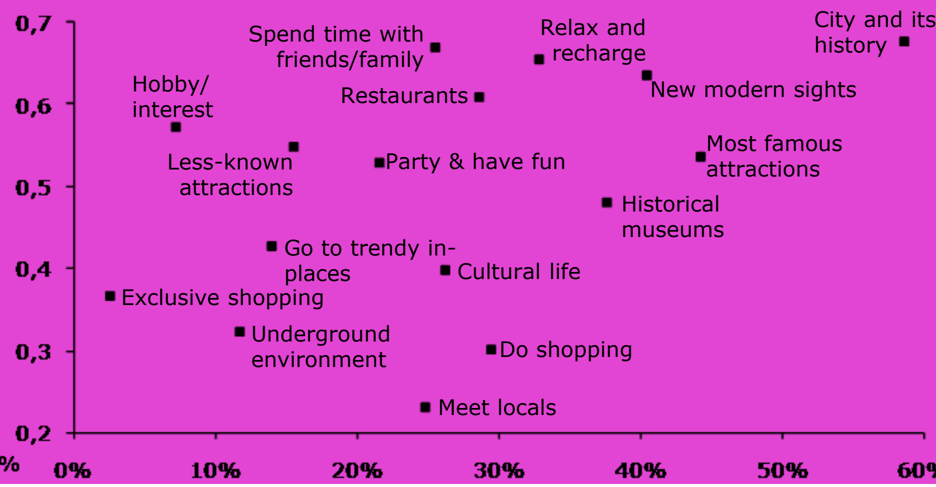
Expectation & satisfaction

s. 60

Reasons to go
Reason to go (%) vs. live up to expectation (-2 to +2)



Motivation to experience
Motivation (%) vs. live up to expectation (-2 to +2)



Expectation & satisfaction

Introduction

The point of the following section is to compare, on the one hand, the tourists' reasons to go to a specific city and motivations to be a tourist, and on the other hand, the way in which the outcome lived up to their expectations. The results are presented as an average for all the cities and for each city. Hence, this section will reveal which of the cities are most successful in overcoming the tourists' expectations.

Results

Generally, the cities perform better than the tourists expected in all aspects. The reason to go stated by most tourists, "atmosphere of the city", is also the reason with the highest satisfaction level. Tallinn, Riga and Vilnius show high satisfaction levels regarding almost all the reasons to go.

Most tourists are motivated to know more about the city and its history. It is the motivation with the highest satisfaction level.

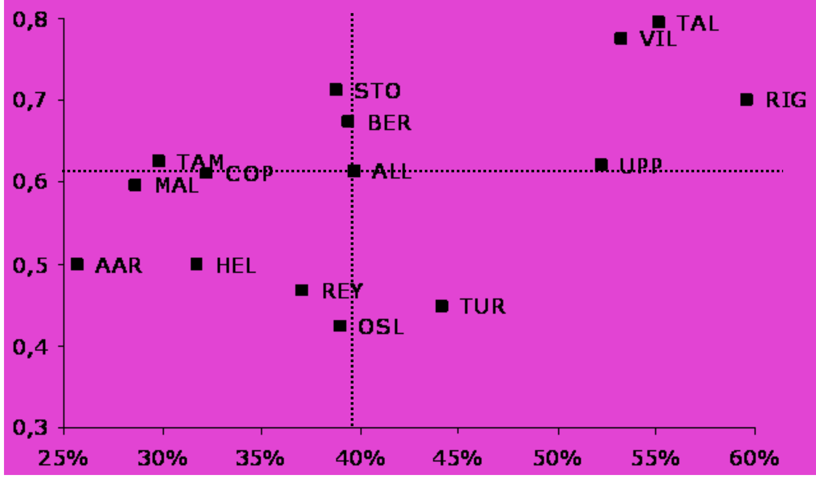
•To meet locals is the motivation that tourists to the lowest degree have experiences with that do not to live up to their expectations.

Method

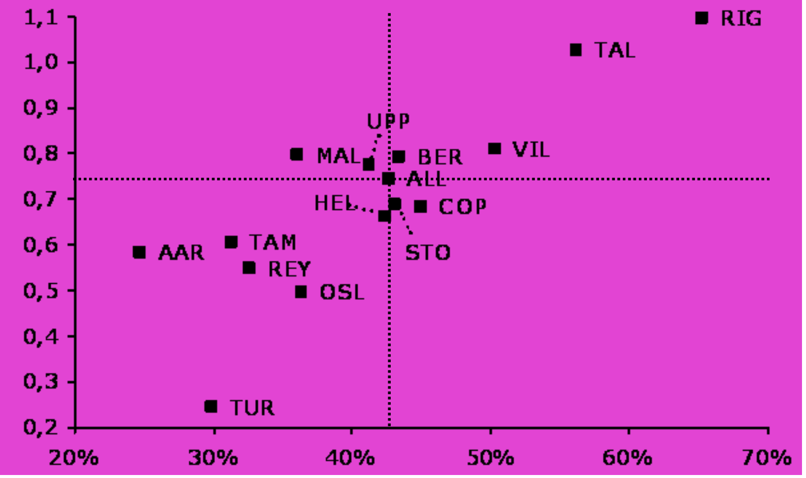
The tourists listed the motivations and reasons while they were in the city and the results should as such show the motivations and reasons as they were before and/or during their holiday. When the tourists were contacted one month after the holiday, they were asked to indicate their specific reasons to go and their specific motivations for the holiday and if they lived up to their expectations.

The graphs in this section are to be read and interpreted in the following way; the X-axis show the percentage of all 5.040 tourists who indicated this as one of their reasons or motivations for going to the specific city. The Y-axis show the average level of expectations being fulfilled (based on the 2.516 tourists who answered part II of the questionnaire) on a scale from –2 to +2.

History of the city
Reason to go (%) vs. live up to expectation (-2 to +2)



Architecture and design of the city
Reason to go (%) vs. live up to expectation (-2 to +2)



Architecture are more satisfying than history

Tallinn and Vilnius exceed expectations to historicity

The "history of the city" is the third most popular reason to go, only outdone by "the atmosphere of the city" (52%) and "architecture and design of the city" (43%). Hence, 40% of all tourists has the history of the city as a reason to go, significantly more of the tourists in the three Baltic capitals together with Uppsala and Turku have the history of the cities as a reason.

All these five cities except Turku have satisfaction levels above average and therefore manage to live up to a higher degree to the expectations. Tallinn and Vilnius show a very high satisfaction level, while Oslo, Turku and Reykjavik score considerably lower. Still, Oslo, Turku and Reykjavik's tourists prove a satisfaction level above the natural average at 0, meaning that the history still live up to their expectations.

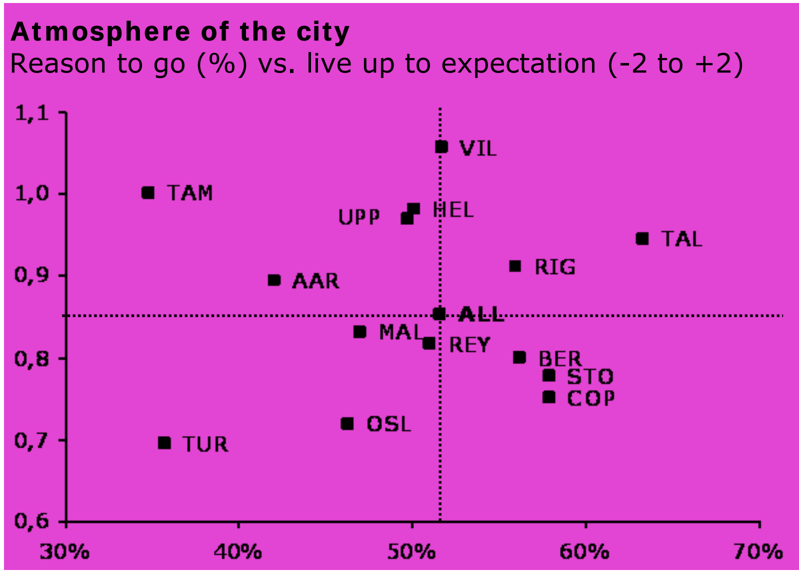
The average level for how all cities lived up to expectations is close to the overall average but ranks only number 7 of all reasons to go in terms of satisfaction. It seems that there is room for improving the storytelling of the historicity of almost all cities, since many tourists come because of this.

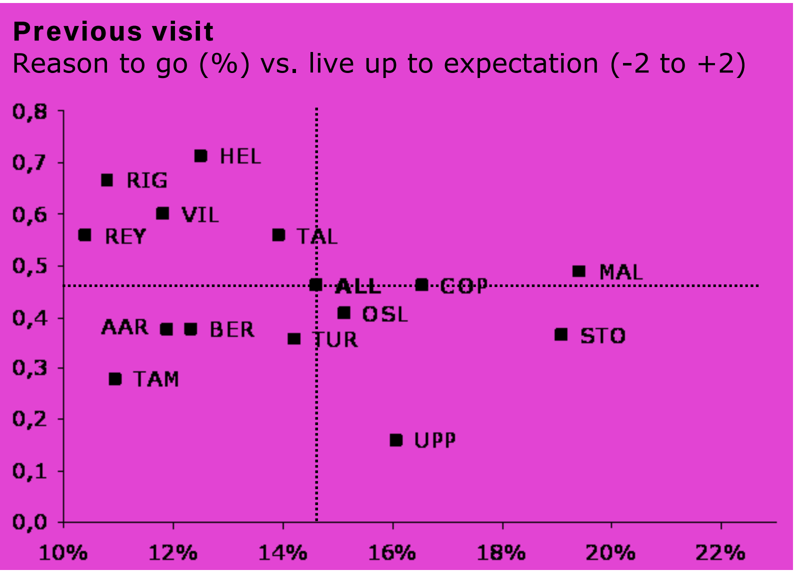
Riga and Tallinn exceed expectations to architecture

"Architecture and design" is the second most popular reason to go, with app. 43% of all tourist coming for this attraction.

Riga has the largest share of tourists who have "architecture and design of the city" as a reason to go (65%). Riga also has most tourists whose experiences have more than lived up to expectations with an average of 1,10 which is significantly higher than the average for all cities (0,74). Tallinn also exceeds expectations to a high degree, while Vilnius, Malmo, Bergen and Uppsala scores a little higher than average.

Helsinki, Stockholm and Copenhagen are placed close to each other on both scales – their tourists share the same opinion when it comes to "architecture and design" as a reason to go and state that this aspect live up to their expectations (though a little below the average for all cities). Turku is the city where the fulfillment of expectations is the lowest (0,24), – 0,5 points below average.





Atmosphere is top reason and gets top satisfaction

Another hat-trick by the three Baltic cities

The three Baltic cities are all found in the upper right corner of the graph – they all have an above average share of tourists who have "atmosphere" as a reason to go (Tallinn has the highest score with 63%) and they all score above average in terms of satisfaction (Vilnius is top performer with 1,06).

The two largest cities, Stockholm and Copenhagen, underperform in terms of giving their tourists experiences that live up to expectations, even though the share of tourists with that reason is above average. Even though the satisfaction level is rather high, the performance could be better compared to other cities.

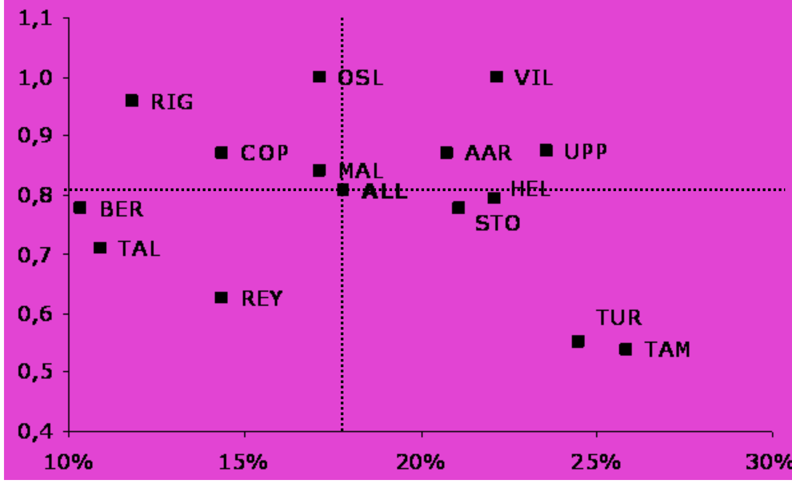
The two Finnish cities, Tampere and Turku, have the same below average share of tourists who have the city atmosphere as a reason to go but while Turku is in last place in terms of living up to expectations, Tampere is the second best in overcoming expectations.

Previous visits makes it harder to satisfy

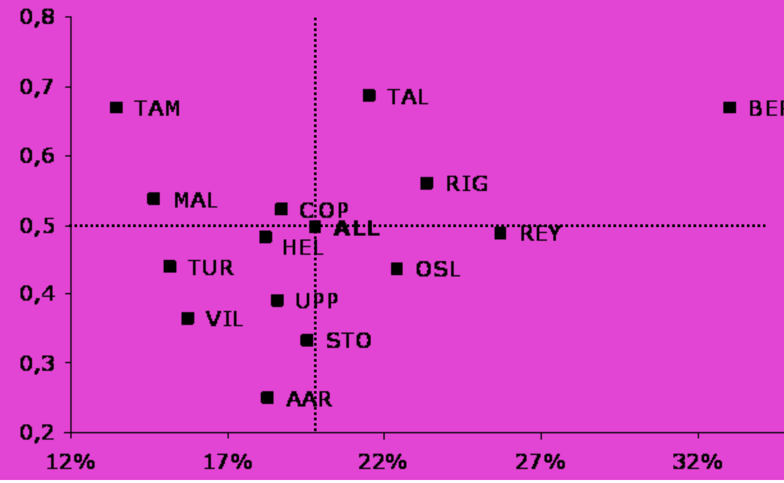
15% of all respondents visit the cities partly because of a previous visit. The share is larger than average for the three Swedish cities plus Copenhagen and Oslo while Reykjavik has the lowest percentage of visitors coming because of a previous visit (10%).

Helsinki is the city with the highest score in terms of overcoming expectations when it comes to this reason with a score of 0,71, 0,25 above the average (0,46). Once again, the three Baltic cities are – together with Reykjavik – placed above average in terms of satisfaction.

To visit people you know
Reason to go (%) vs. live up to expectation (-2 to +2)



Recommendations from family / friends
Reason to go (%) vs. live up to expectation (-2 to +2)



Word of mouth as reason to go

Oslo and Vilnius have the best ambassadors

18% of all tourists have “to visit people you know” as a reason to go. Fortunately, the satisfaction related to this aspect is very high, only outdone by the way in which the atmosphere of the cities manage to live up to expectations. It seems that the people living in the cities are good ambassadors when it comes to welcoming people they know.

Oslo and Vilnius score significantly higher than average while Turku and Tampere, which have the highest shares of tourists coming to visit people they know show the lowest levels of satisfaction, i.e. they live up to the expectations to a lower degree than all other cities.

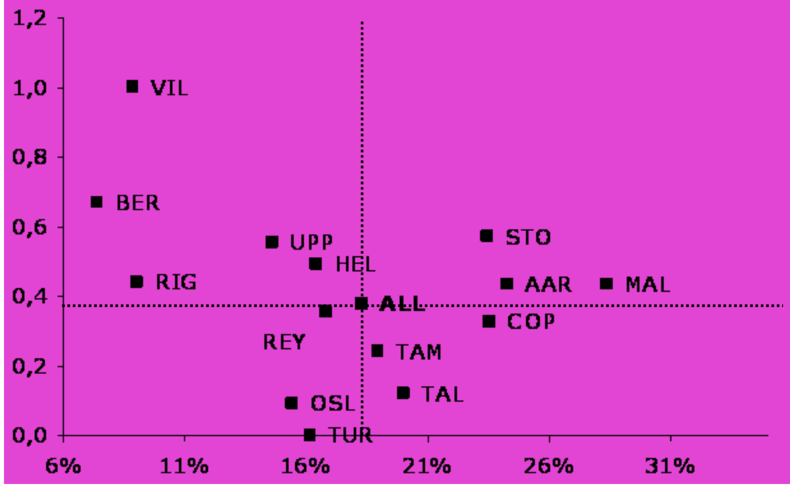
Recommendations are very useful

Recommendations from friends or relatives is a relatively important reason to go. Here, Bergen has the highest score and the second highest level of satisfaction. The average for all tourists is 20% looking at the reason to go and 0,5 in terms of satisfaction (somewhat better than expected).

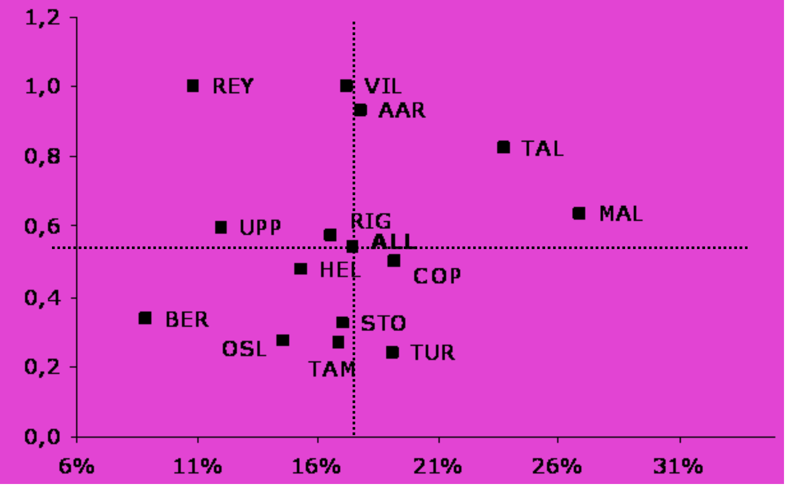
Also Reykjavik, Riga, Oslo and Tallinn are cities visited because of recommendations. While Tallinn and Riga live up to the recommendations to a high degree (above average), Oslo and Reykjavik do not obtain such levels.

The city with the lowest satisfaction level is Aarhus, followed by Stockholm.

Shopping
Reason to go (%) vs. live up to expectation (-2 to +2)



Eating and drinking
Reason to go (%) vs. live up to expectation (-2 to +2)



Shopping more important than food – but not as good

Shopping gives a low satisfaction

A larger than average number of tourists come to Malmo, Aarhus, Copenhagen and Stockholm for "shopping" – but this could be much more satisfying. Even though all cities score above 0, the average of how "shopping" lived up to expectations is much lower than when looking at most other reasons to go.

The cities that do not have a high score for shopping as a reason to go experience a higher satisfaction with shopping than the cities where shopping scores highly as a reason to go. Examples of this phenomenon are Vilnius, Bergen, Uppsala and Riga.

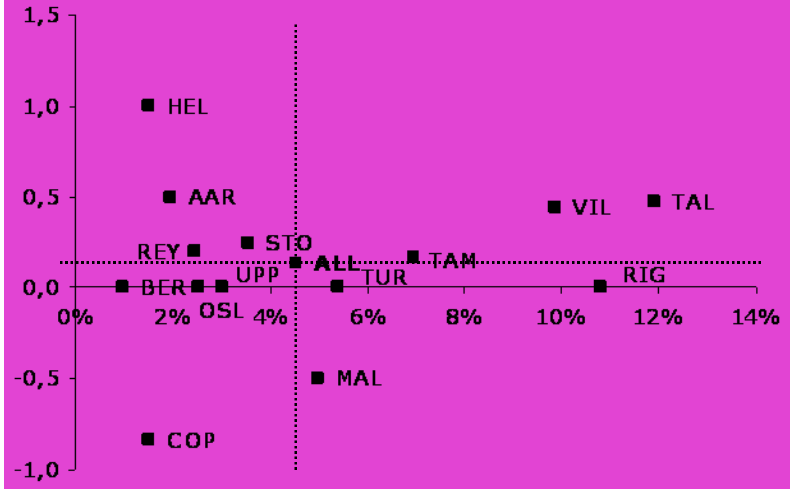
The tourists in Turku state the lowest level of satisfaction – but it is exactly as expected (0,00). Other cities appearing in the lower half of the satisfaction scale are Oslo, Tallinn and Tampere.

Food satisfies needs – best of all in Reykjavik

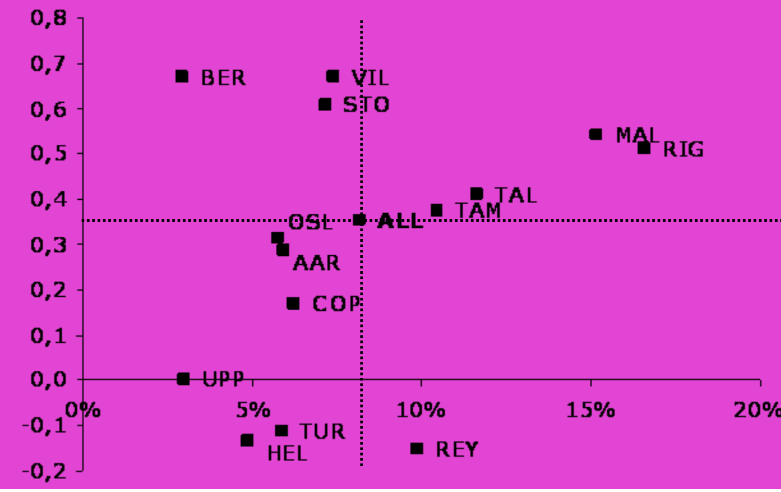
"Eating and drinking" is a reason to visit a city for 17% of the tourists. Malmo has the highest share with 27% tourists, while Bergen (9%) and Reykjavik (11%) have a smaller share of tourists who come specifically for "eating and drinking".

Reykjavik scores the highest satisfaction level of 1,00 compared to the average at 0,54. Turku, Tampere, Oslo and Stockholm show the lowest satisfaction scores.

Low cost of stay in city
Reason to go (%) vs. live up to expectation (-2 to +2)



Low cost of transportation to city
Reason to go (%) vs. live up to expectation (-2 to +2)



Money does not matter, prices do not impress

Three Baltic cities have a "discount" reputation

While no more than 4,5% of all tourists have "low cost of stay in city" as a reason to go, the number is more than twice as high in the three Baltic capitals. Tallinn (12%), Riga (11%), and Vilnius (10%) have considerably more tourists than average who come because of low prices. Vilnius and Tallinn more than live up to these expectations (well above the average for all cities), while Riga is below average with 0,00.

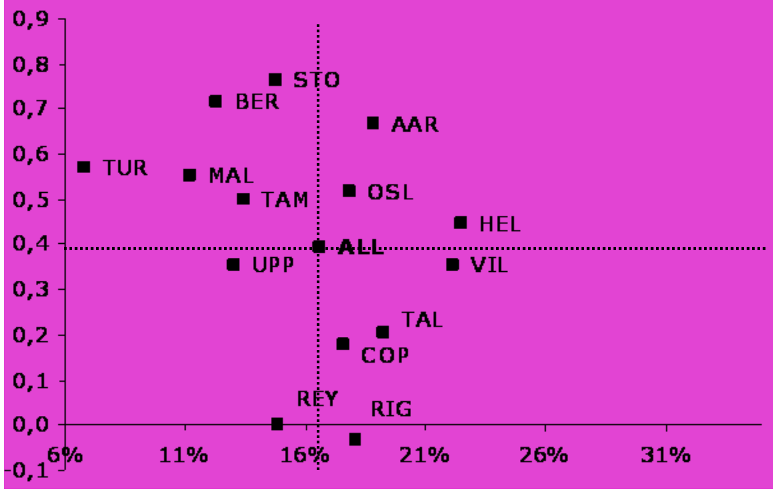
The very few tourists in Copenhagen who come because of low costs are significantly dissatisfied (-0,83). This score is the low-scorer of all satisfaction levels, showing that Copenhagen is more expensive than anticipated by very few tourists. Other cities that underperform in relation to the expectations tourists have to costs are
Malmo, Bergen, Oslo, Uppsala and Turku.

Not too satisfied with transportation costs

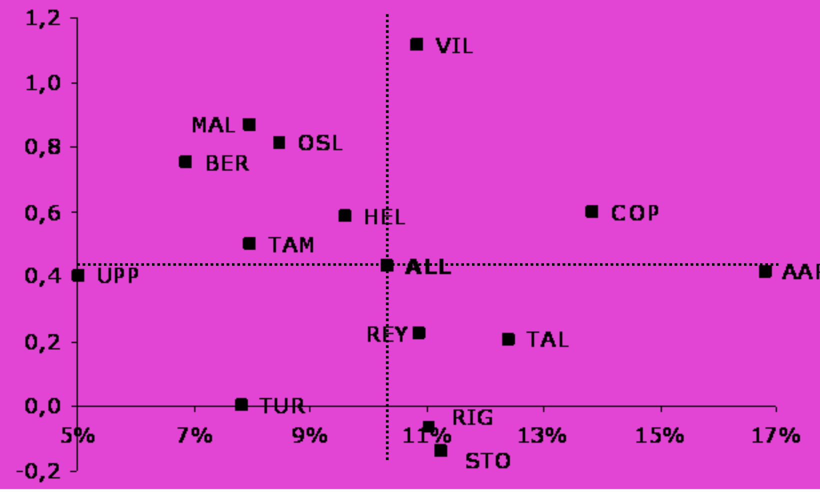
The two price parameters on this page, "low cost of stay in city" and "low cost of transportation to city", are the two reasons which score the lowest average satisfaction level. Luckily, the second price parameter is also not an important reason to many, hence only 8% mentions "low cost of transportation to city" as a reason to go.

The average satisfaction with transportation costs is 0,35. Bergen, Vilnius and Stockholm are the cities which surprise most in a positive way, while Reykjavik, Helsinki and Turku show to have higher costs of getting there than expected .

To get to know local people
Reason to go (%) vs. live up to expectation (-2 to +2)



Night life
Reason to go (%) vs. live up to expectation (-2 to +2)



Locals and night life could be much better

Local people are not being too nice

17% of all tourists have "to get to know local people" as a reason to go. The level of satisfaction related to this reason is lower than the average (0,39), only better than the results concerning shopping and the two price parameters. The satisfaction with the local people should of course be improved, e.g. by establishing a better balance between expectations and outcome.

Stockholm, Bergen and Aarhus have the highest satisfaction levels, but also Turku, Malmo, Tampere and Helsinki perform above average. On the contrary, Riga, Reykjavik, Copenhagen and Tallinn have locals that lives up to expectation to a degree significantly below average.

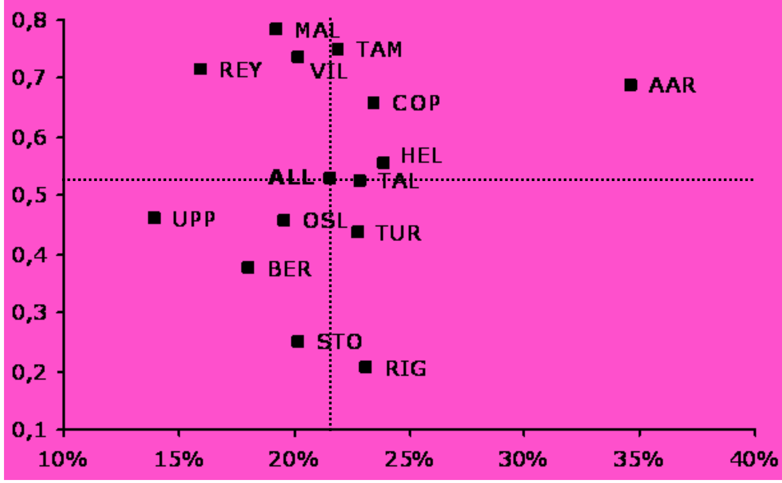
Night life is a reason to go to Aarhus and Copenhagen

In average, app. 10% of all tourists go on holiday because of the night life. The way in which night life lived up to the expectations in this area is not too impressive with an average of 0,43.

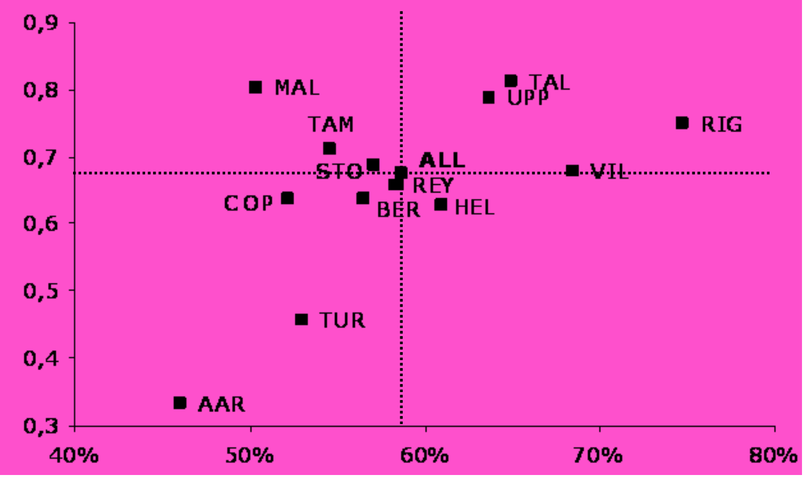
In Aarhus, the share of tourist that have "night life" as a reason to go is significantly higher with almost 17%.
Also, Copenhagen has a high share (14%). Uppsala is the city with fewest tourists coming because of the night life (5%) followed by Bergen and Turku.

The tourists are most positively surprised with the night life in Vilnius, while the three cities Malmo, Oslo and Bergen all have a higher satisfaction levels than average – but with a smaller share of tourists having this as their reason to go.

I want to party and have fun
Motivation (%) vs. live up to expectation (-2 to +2)



I want to know more about the city and its history
Motivation (%) vs. live up to expectation (-2 to +2)



History is hotter than partying – also on a satisfaction level

Malmo, Vilnius and Reykjavik satisfy party hunger

Together with the cities of Copenhagen, Helsinki and Tampere the city of Aarhus have tourists who want to party and are more than satisfied with what is offered (upper right corner of the graph). 35% of Aarhus' tourists go out to party and have fun while the average number for all the tourists is 22%. For these cities, the satisfaction level concerning this specific motivation is also well above average.

Malmo, Vilnius and Reykjavik surprise their tourists in terms of partying and having fun. They all have a lower than average share of tourists who want to party – but these tourists are exceptionally satisfied with what they get (upper left corner of the graph).

Turku and Riga have more tourists than average who want to party – but the way in which these tourists' experiences live up to expectations is unfortunately below average. Uppsala, Stockholm, Bergen and Oslo all have a share of party motivated tourists below average as well as a satisfaction level below average.

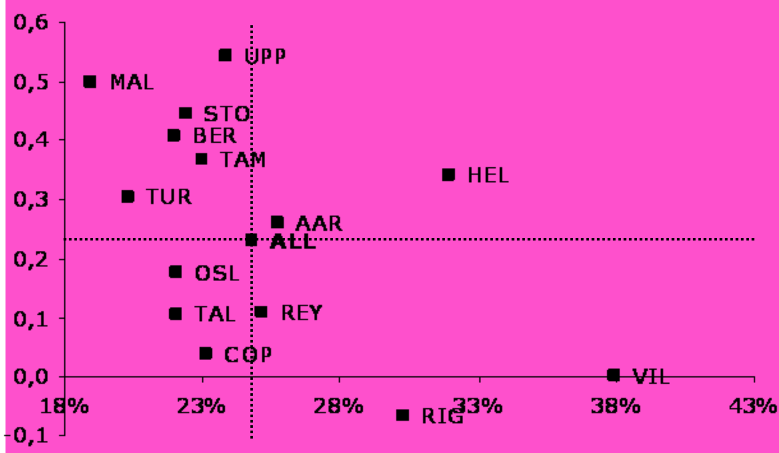
Tallinn, Malmo and Uppsala have good histories

Common for all cities are a large share of tourists motivated "to know more about the city and its history". The same goes for the average satisfaction level which is the highest for all motivations with a score of 0,68. So in general, the cities perform strongly on the history parameter.

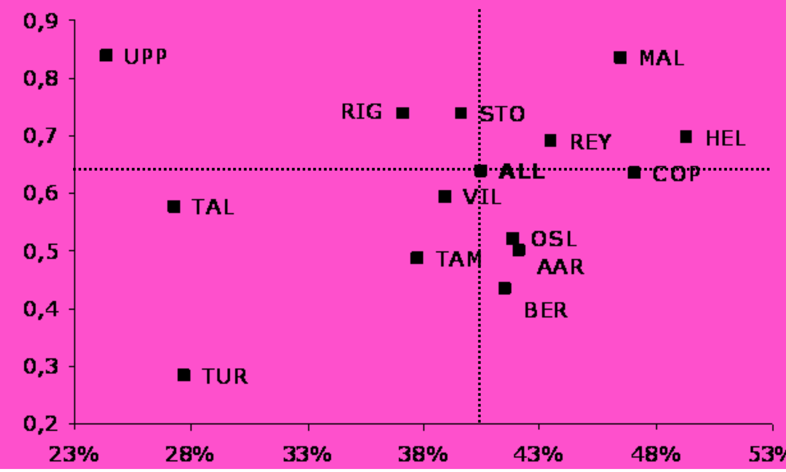
While Riga has the most tourists motivated "to know more about the city and its history", Tallinn scores higher on satisfaction, closely followed by Malmo and Uppsala. Malmo has a much smaller share of history motivated tourists but surprises the tourists who actually long for history.

Aarhus shows the lowest satisfaction level as well as the smallest share of tourists who want to know more about the city and its history. Interestingly, when one of the city's main attractions is the living historical museum *The Old Town.* Turku, Copenhagen, Bergen, Helsinki and Reykjavik also have satisfaction levels below average for tourists motivated by history.

I want to get in touch with the local citizens
Motivation (%) vs. live up to expectation (-2 to +2)



I want to see new, modern and different places
Motivation (%) vs. live up to expectation (-2 to +2)



Locals do not live up to expectations

Swedes are simply the best

One out of four tourists say they are motivated to get in touch with local citizens, making it a quite important motivational factor. However, it is discouraging that the average satisfaction level related to this motivation is the lowest of all. In average, the satisfaction when it comes to meeting locals is a mere 0,23. All 14 cities have something to work on in terms of welcoming and including the tourists better in the city.

However, the Swedes are more friendly, open and/or welcoming than any other nationality in the Nordic/Baltic countries. Hence, the trio of Swedish cities, Uppsala, Malmo and Stockholm, have the three highest satisfaction levels, well above average.

While Vilnius and Riga have the largest and third largest share of tourists motivated to meet locals, they at the same time have the two lowest satisfaction levels at 0,00 and –0,07.

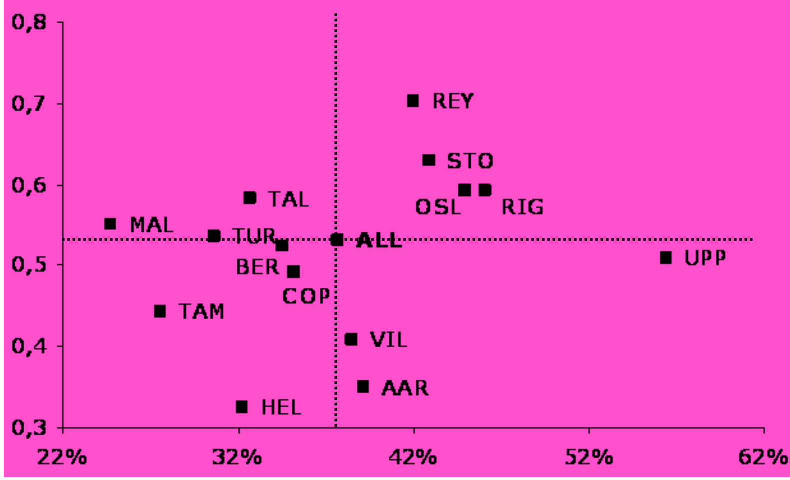
Malmo and surprisingly Uppsala satisfy modernity

Malmo has a large share of tourists who want to see “new, modern and different places” – and judging from the satisfaction level, the city seems to satisfy that hunger (the Turning Torso probably plays a role here).

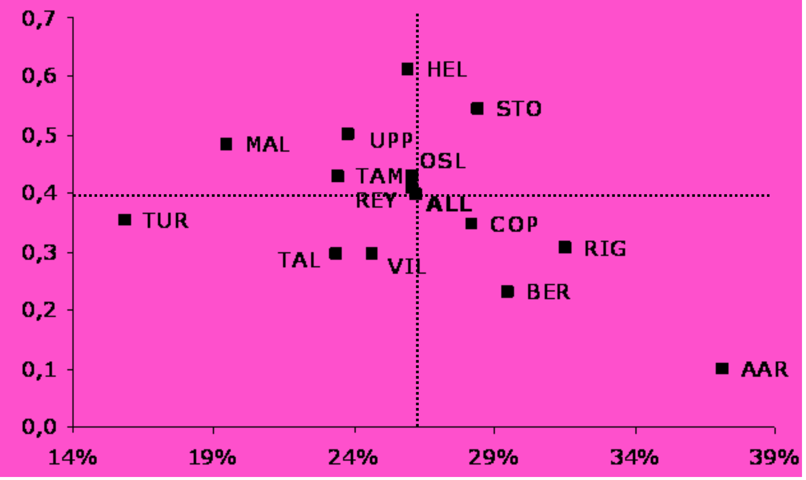
But also Uppsala more than live up to expectations to a high degree (0,84), the highest of all cities, even though Uppsala has the smallest share of tourists who are motivated to see new, modern and different places.

Other cities performing well in terms of satisfaction with this parameter are Riga, Stockholm, Reykjavik and Helsinki.

I want to visit the city's historical museums
Motivation (%) vs. live up to expectation (-2 to +2)



I want to see the cultural life, e.g. theatres
Motivation (%) vs. live up to expectation (-2 to +2)



Museums and cultural life score medium satisfaction

Museums in Reykjavik and Stockholm satisfy the most

To visit the historical museums is the fourth most popular motivation, but in terms of satisfaction level it comes in as number ten on the list. In other words, there is room for improvement in the historical museums which are sought for by many.

Hence, 38% of all tourists are motivated to go to the city's historical museum. Uppsala's share is much higher(57%) while Malmo has the lowest share(25)%. Both cities are close to the average level in which all cities manage to live up to expectations (0,48).

In terms of satisfaction, Reykjavik has the most satisfied tourists with a score of 0,65. Other cities with more than average satisfied tourists are Stockholm, Oslo, Tallinn and Riga.

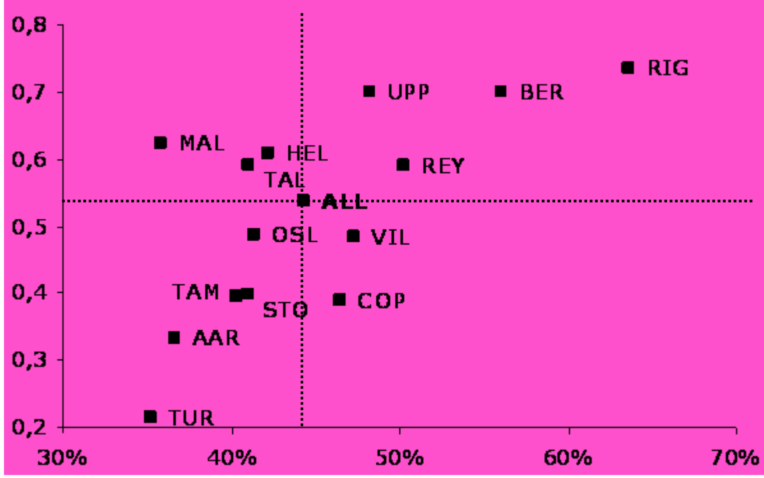
In the other end of the satisfaction scale, Helsinki and Aarhus have tourists who are not too satisfied with their historical museums.

Aarhus motivates cultural life – but miss out on satisfaction

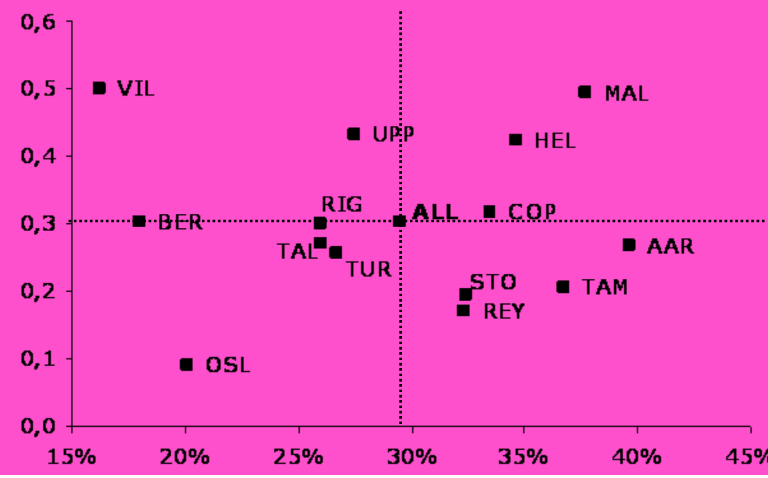
One out of four are motivated to take part in the cultural life of the city, e.g. theatre, opera and ballet performances. This share is much larger in Aarhus (37%) and much smaller in Turku (16%).

Unfortunately for Aarhus, the most motivated tourists are also the ones least satisfied (0,10) compared to the average of 0,40. Helsinki scores the highest satisfaction level with an average satisfaction of 0,61, closely followed by Stockholm, Uppsala and Malmo. Many cities have a close to average motivation as well as satisfaction level.

I want to see the most famous attractions
Motivation (%) vs. live up to expectation (-2 to +2)



I want to do shopping
Motivation (%) vs. live up to expectation (-2 to +2)



Shopping could be much better

Riga wins most famous attractions award

Not only does Riga have the largest share of tourists who are motivated to "see the most famous attractions", they also manage to have the most satisfied tourists. The expectations are more than met and fulfilled. Other cities in the same category are Bergen, Reykjavik and Uppsala.

At the other end of the scale, the tourists have lower expectations and lower satisfaction levels in Turku, Aarhus, Tampere and Stockholm.

Copenhagen and Vilnius both have more tourists who are more motivated than average to see the most famous attractions – these tourists experience a satisfaction level below average, though.

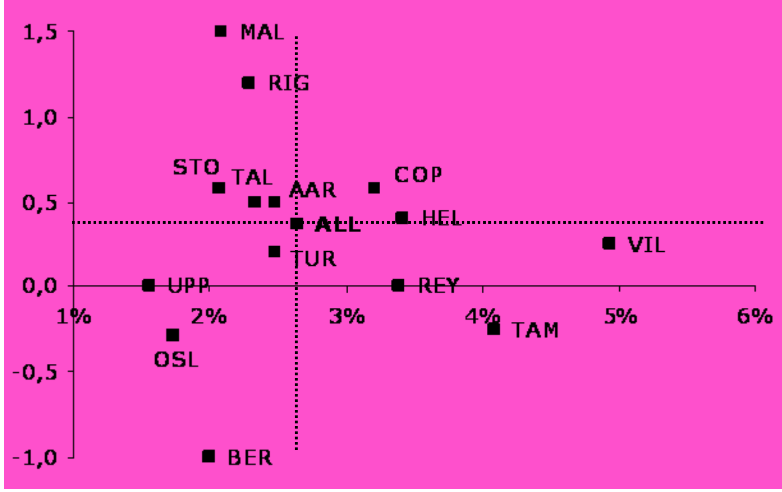
Malmo and Vilnius satisfy the shopping gene

Close to three out of ten tourists "want to go shopping", making shopping the sixth most popular motivation. But shopping as a motivation lives up to expectations to a low degree, leaving the last place to getting in touch with local citizens.

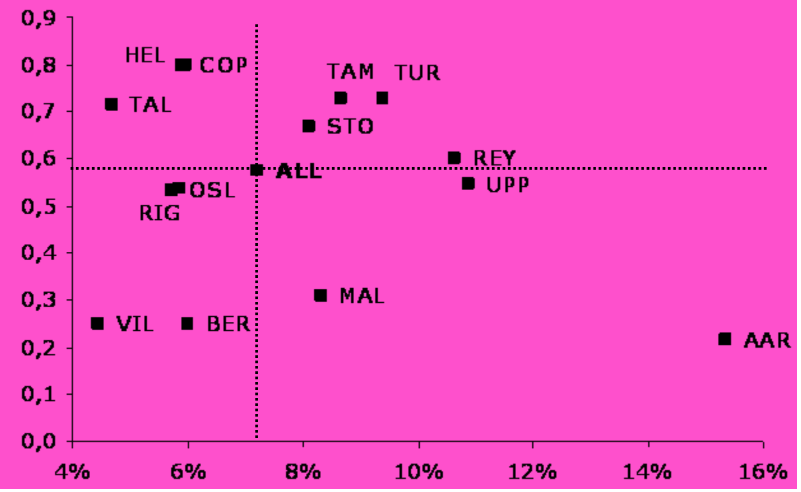
The three smaller cities Aarhus, Malmo and Tampere have the highest number of shopping motivated tourists closely followed by Helsinki, Copenhagen and Stockholm. But while Aarhus and Tampere satisfy below average, Malmo score well above average.

Vilnius, Bergen and Oslo have the lowest number of tourists with shopping as a motivation to experience the city. In this area Oslo satisfies the least, while Vilnius satisfies the most of all.

I want to do exclusive shopping (luxury)
Motivation (%) vs. live up to expectation (-2 to +2)



I want to engage in a special hobby / interest
Motivation (%) vs. live up to expectation (-2 to +2)



High satisfaction with own interests

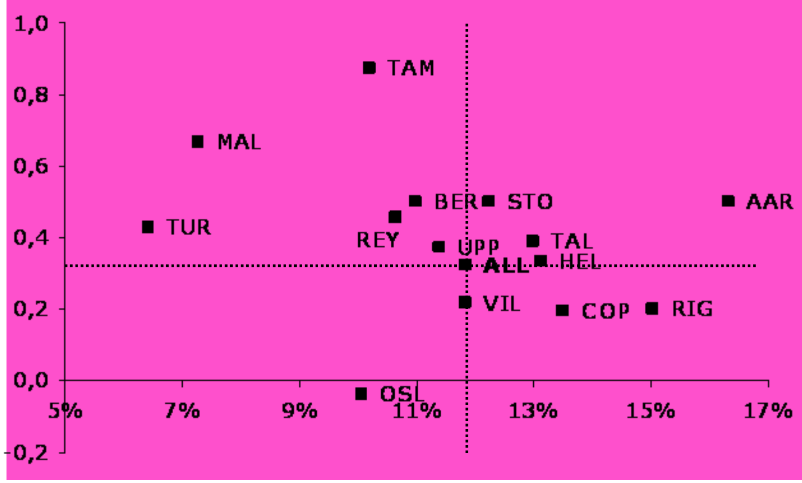
Few tourists motivated by luxury shopping
Only 3% of all tourists say they are motivated by luxury shopping, placing this motivational factor at the bottom of the list. Hence, the number of respondents is very limited.

Special hobby motivates - mostly in Aarhus
Aarhus has a significantly larger share of tourists motivated by their own hobby or interest than average. 15% of Aarhus' tourists are motivated in this way, but they are the least satisfied of all with a score at 0,21.

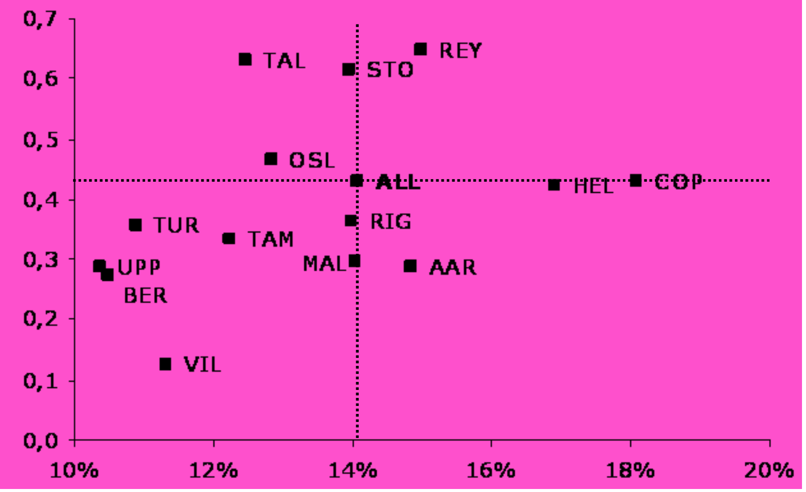
While only 7% in average are motivated by their special hobby/interest, making it one of the least motivations to experience, the satisfaction level is above average compared to the other motivational factors. This is probably due to the fact that these tourists are very interested in getting their expectations fulfilled, since it is has to do with themselves.

At the other end of the satisfaction scale, the few tourists in Helsinki and Copenhagen who actually do want to pursue their interest or hobby are very satisfied with the outcome (0,80).

I want to experience underground environment
Motivation (%) vs. live up to expectation (-2 to +2)



I want to visit trendy in-places
Motivation (%) vs. live up to expectation (-2 to +2)



Reykjavik is trendy, Tampere underground

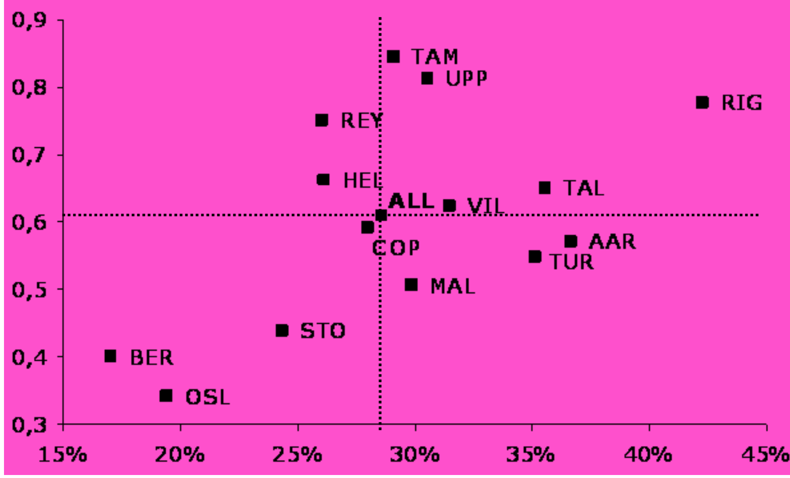
Underground environment is not a big thing
12% of all the tourists want to experience the underground environment in the city they visit. The overall satisfaction is only a 0,3, which means that things are almost as they expected.

Tampere is an exception with a satisfaction level of almost 1, hence the visitors are more satisfied than they expected to be. Oslo is the only city that really disappoints with a satisfaction level below 0, meaning that the tourists had a worse experience than expected.

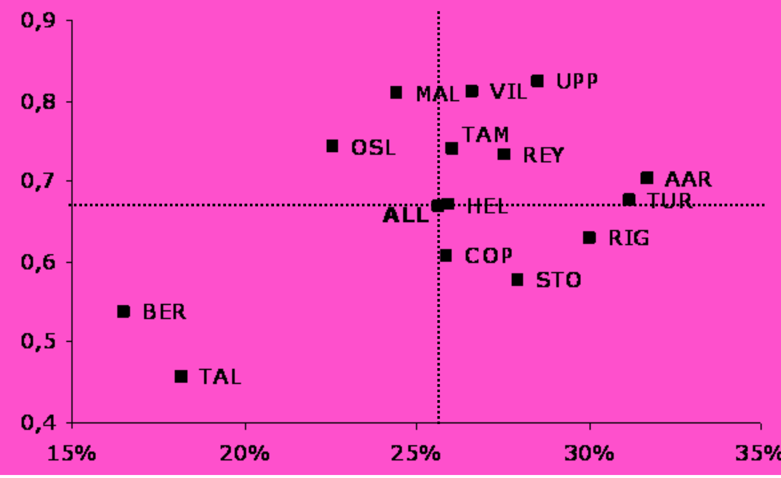
Reykjavik's trendy in-places are most satisfying
14% of all tourists are motivated to find trendy in-places, those places which the locals as well as trend magazine Wallpaper adore. This share is highest in Copenhagen (18%) and Helsinki (17%), while Uppsala, Bergen and Turku have considerably fewer tourists motivated by this factor (less than 11%).

Looking at the most satisfying cities in terms of trendy in-places, Reykjavik is a horsehair ahead of Tallinn and Stockholm. These cities all manage to more than live up the expectations.

I want to go to attractive restaurants/cafes
Motivation (%) vs. live up to expectation (-2 to +2)



I want to primarily spend time with friends/family
Motivation (%) vs. live up to expectation (-2 to +2)



Hanging out is best in Uppsala

Restaurant satisfaction high in Riga, low in Oslo

29% of all tourists are motivated to go to attractive restaurants and cafes. Of course, everyone do so, more or less, but almost one-third has this factor as a motivation for their holiday experience.

Riga has the highest share with 42% while Bergen's tourists are the least motivated in this aspect (17%).

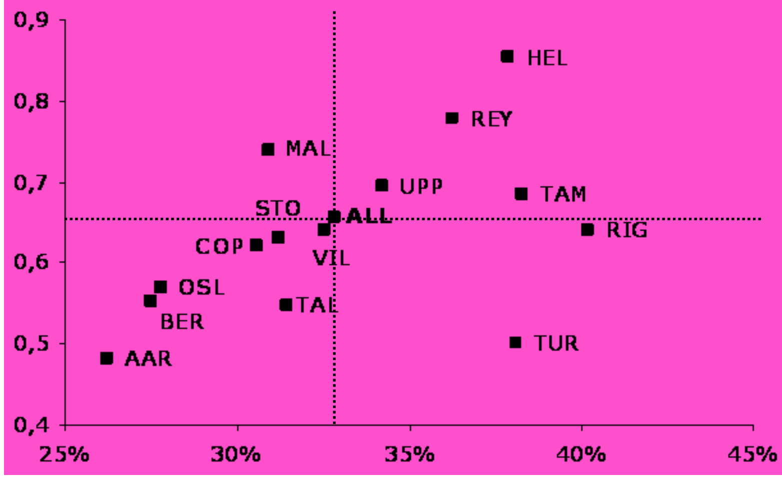
The cities where tourists' expectations are met to the highest degree are Tampere, Uppsala and Riga, while Oslo, Bergen and Stockholm score well below average in terms of satisfaction. The average satisfaction level is in the better half of all satisfaction levels.

Uppsala, Vilnius and Malmo are perfect for hanging out

The three cities of Uppsala, Vilnius and Malmo score very high on the motivational factor "to spend time with my friends and family". In fact, all 14 cities actually do so, making this average satisfaction level the second-best of all, only surpassed by the way in which the city and its history lives up the expectations.

Aarhus, Turku and Riga has the highest share of tourists motivated to primarily spend time with their travel group, while Bergen and Tallinn have significantly fewer in this category.

I want to relax and recharge
Motivation (%) vs. live up to expectation (-2 to +2)



Helsinki is the relaxing capital

Relaxing is important and satisfying

33% of all tourists have “to relax and recharge” as a motivation for their stay in the cities. That makes it the fifth most popular motivation to go.

Looking at the satisfaction scale, this motivational parameter is the second-most satisfying of all.

It seems that Helsinki, Reykjavik and Malmo supply exceptionally good surroundings for relaxing, while Aarhus and Turku are less satisfying in this area.

Segments

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Demographic segments: WHO
WHO are the tourists?

Psychographic segments: WHAT
WHAT motivations do the tourists have?

Experience segments: HOW
HOW do the tourists want to experience?

Three different market segmentations

The large number of tourists in the survey and the many different Q's & A's give a unique possibility to segment the tourists into different groups using different methods and approaches. By applying three different ways of segmentation, we get different perspectives on the data which thereby give different perspectives for future actions and recommendations within tourism.

Demographic segments: WHO

Traditionally, the target groups and market segments within tourism and business in general have been and are based on demographic variables such as age, gender, household type and level of education. Based on the background variables of this survey, we have constructed four market segments on the basis of this more traditional method, using a combination of age and household type to divide the tourists into groups. This kind of market segmentation explains *who* the tourists are.

Psychographic segments: WHAT

As a response to the more traditional approach to market segmentation, a market segmentation based on psychographic variables has been developed. Here, the target groups are constructed using so-called IOA-variables, that is Interests, Opinions and Attitudes. In the project, this kind of segmentation is based on a question exploring what the tourists are motivated to do while they are in the city. The method is a cluster analysis, called k-means cluster. This kind of market segments explains *what* the tourists want to do.

Experience segments: HOW

Within the theoretical framework of this project, we have developed a third approach to market segmentation. Instead of answering *who* the tourists are (demographic approach) or *what* they want to do (psychographic approach), this third approach explores *how* different groups of tourists want to experience and design their experiences – that is, the experience design approach.

Demographic segments WHO	Psychographic segments WHAT	Experience segments HOW
Young (18-25 years old, no children)	**Party tourists** (party and have fun, meet locals etc.)	**Controlled entertainment** (entertained, designed by others)
Couples (26-40 years old, no children)	**Modern tourists** (see modern places, attractions etc.)	**Uncontrolled entertainment** (entertained, designed by yourself)
Families with children (26-50 years old, with children)	**Relax tourists** (relax & recharge, with family & friends etc.)	**Controlled exploring** (exploring on your own, designed by others)
The second youth (+51 years old, no children)	**History tourists** (city history, historical museums etc.)	**Uncontrolled exploring** (exploring on your own, designed by yourself)

12 different target segments

The relation between the segmentations and segments

The three different ways of segmentation give different perspectives to the data.

As such, there is no hierarchy per se between the segmentations that makes one better or worse than another. But, of course, the ambition is to show that the psychographic and/or experience design segments give an understanding of the data in a different way than the demographic segments – and perhaps inspire to different actions and recommendations when it comes to marketing, branding, behavioural analysis etc. within tourism.

Segment constitution

The table above summarises what constructs or constitutes the three different types of segments.

For example, the table shows that the modern tourists have a shared interest in going to see the places that are new, modern and innovative as well as a desire to visit the most famous attractions.

Labelling the segments

The names or labels given to the 12 different segments are inspired by the demographic, psychographic and experience variables that constitute them according to our analysis.

For example, the 'families with children' segment are found in the age group that most typically share a household type with dependent children. The relaxing tourists have been given this name to show their most likely behaviour, namely to relax and just hang around with their family and/or friends.

The size of the segments

The psychographic and experience design segmentation compromise 100% of all tourists, while the demographic segmentation captures 68% of all tourists, leaving 32% in an "other category".

Different but similar, similar but different

All segments are different but similar

The three approaches each produce four distinct segments that are different but similar.

By this, we mean the segments show a lot of differences, not only on the parameter that actually segments them but also on a number of other variables. On the other hand, the segments are also very alike when it comes to some of the variables, such as background variables, motivations, activities, reasons to go and information search. These differences and similarities will of course be further investigated in the following sections.

Attention, attention, attention

Here, as an introduction to the three different segmentations, a number of things should be stressed.

First of all, the segments are stereotypical in the sense that no single tourist will only belong to one segment per se. No matter how the tourists are segmented, there will always be exceptions to the rule and therefore people who will not follow the stereotypical behaviour– even though they do belong to a specific segment. For example, only 42% of the party tourists are actually into party and have fun, even though the rest of their answers show a pattern similar to other party tourists.

Secondly, the segments are described and analysed relatively and in terms of more or less significant differences between the segments and the average. This will sometimes make it important to examine the results closely. For example, the modern tourists are characterised as travelling with children more often than other segments, but 'only' 18% of the modern tourists actually bring children along with them (this share is of course still larger than the average).

Demographic segments

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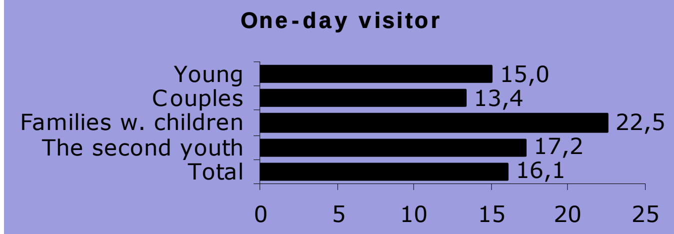
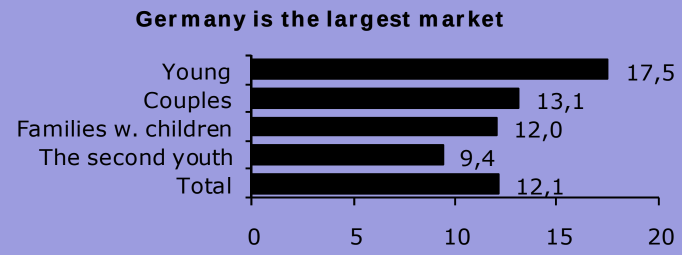
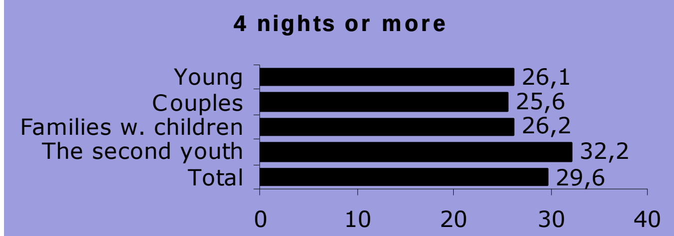
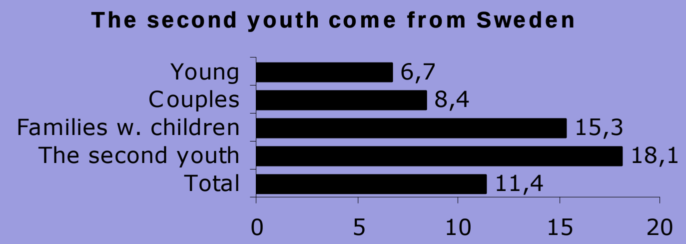








4 demographic segments

Traditionally, the target groups and market segments within tourism and business in general have been and are based on demographic variables such as age, gender, household type and level of education. This kind of market segmentation explains *who* the tourists are. Using the demographic variables to construct the segments in this section we investigate what the different segments are doing in the cities.

We name the demographic segments: <u>young</u> (18-25 year olds, travelling without children), <u>couples</u> (26-40 year olds, travelling without children), <u>families with children</u> (26-50 year olds, travelling with children) and <u>the second youth</u> (+50 year olds travelling without children).

The demographic segments

22% (1.101 respondents) of all tourists can be placed in the largest segment, labelled "the second youth".

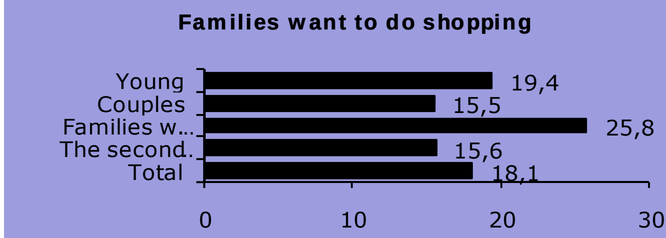
The second largest segment is the young (19,5%). 984 respondents of all the tourists are found in this group.

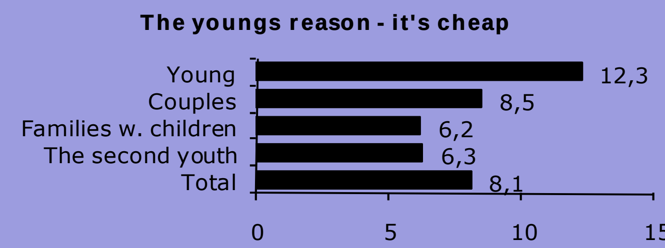
The smallest segment is families travelling with children, 10,2% (516 respondents), while couples contain 786 respondents (15,6%).

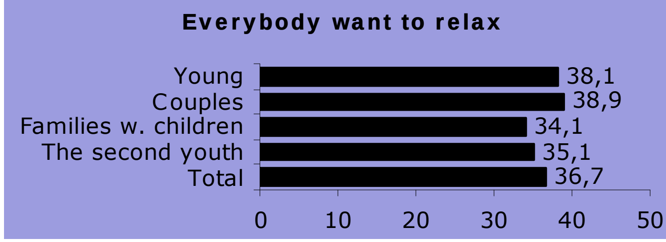
Families with children are one-day visitors

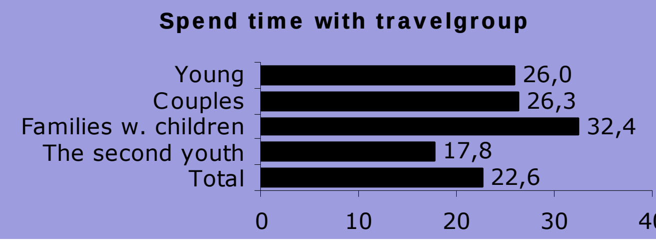
One-day visitors are predominantly families with children, while "the second youth" is the largest group staying 4 nights or more. Also couples and families with children often stay 4 nights or more, respectively 25,6% and 26,2%.

When we take a look at where the tourist in the different segments come from, Germany takes first place – especially the young segment comes from Germany (17,5%). Sweden is the second largest country in the survey but unlike Germany, Sweden has the second youth as the largest segment (18,1%).









The cities in itself – strong reason for going

Families are more into shopping

Families with children (25,8%) are more likely to go shopping and as mentioned earlier this segment is also in particular one-day visitors. This means that the families with children are likely to visit one of the cities for one day for shopping purposes.

Relax and recharge is popular for all

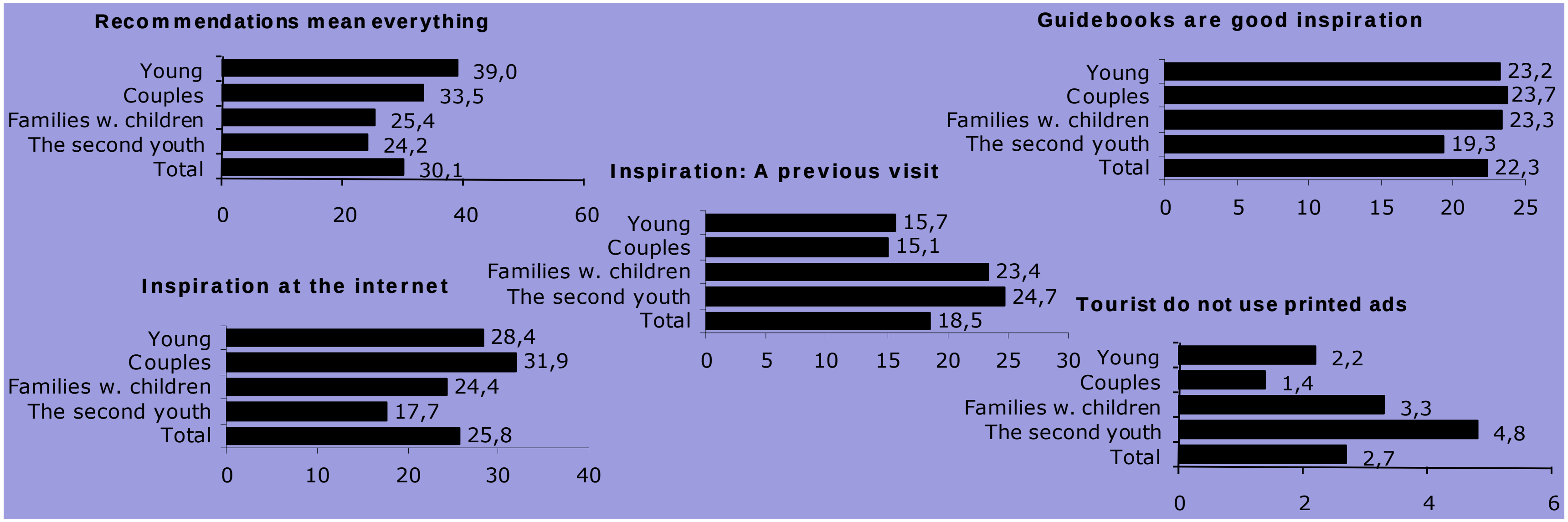
To relax and recharge batteries for work later on is the fourth most popular reason for going – and that's common for all the four segments. Tourists do not want to get stressed on their holiday.

The demographics segment's reasons for going

Money has a greater impact on the young segment's choice of destination. Regarding the three other segments the price does not have a significant influence on their choice of city.

Spending time with group is important for families

It is a more important reason for the families than any of the other segments to spend time with their travel group.



Inspiration from both Internet and guidebooks

All the segments use the Internet for travel inspiration. The couples use it most, while the second youth use it less.

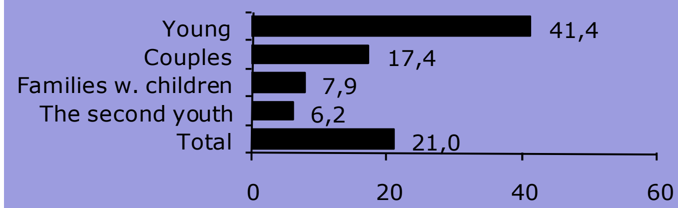
The CTO's websites are more favoured among the children families than the other segments. The young are the most frequent users of blogs. What is interesting is that the age does not discriminate the tourists' use of the Internet and all the four segments use web-communities to almost the same extend when looking for inspiration – maybe they also share their experiences with other tourists. Even though the Internet is a good source of information, guidebooks play an important role when tourists seek inspiration on where to go.

The word of mouth recommendations from families and friends are of great importance when the tourists – especially the young (39%) – decide what city to visit.

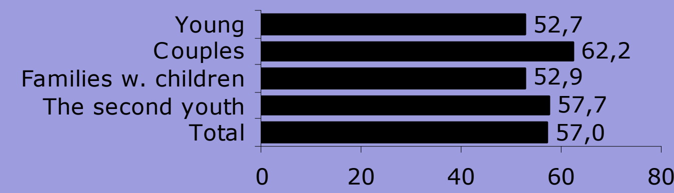
The survey also shows that many of the tourists get their inspiration from a previous visit. As we saw previously, a large part of all the tourists have been in the city they visit before.

Most tourism organisations use printed ads as a marketing channel – but the tourists do not use ads for inspiration regarding which city to visit. Much more effort should be used in developing the tourism organisations official tourist websites.

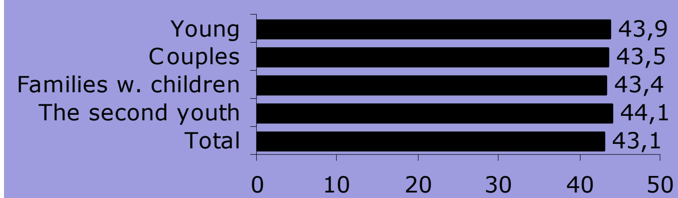
The young want to party and have fun



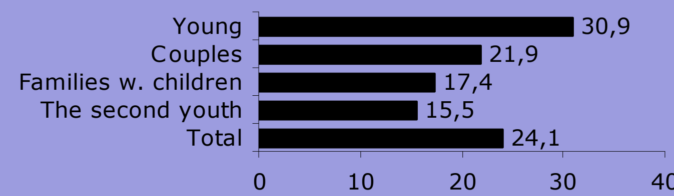
Reason for going: The city and its history



The most famous attractions are popular



The young want to meet the locals



Motivation to experience is almost alike in history

History of the city is important to all

All the demographic segments are to a high degree motivated by the history of the city. They also, as we saw in reasons for going, want to relax and recharge batteries for work and spend time with their travel group. Particularly the couples (62,2%) and the second youth (57,7%) are motivated by the history of the city.

Famous attractions are important to all

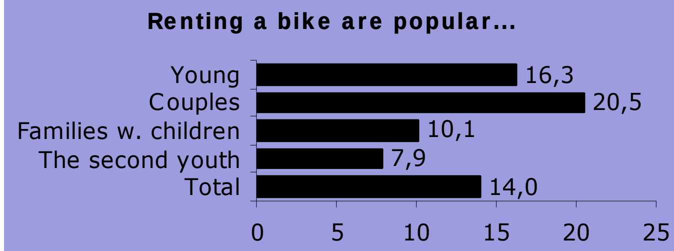
All the segments agree that the most famous attractions were a motivation to experience a specific city.

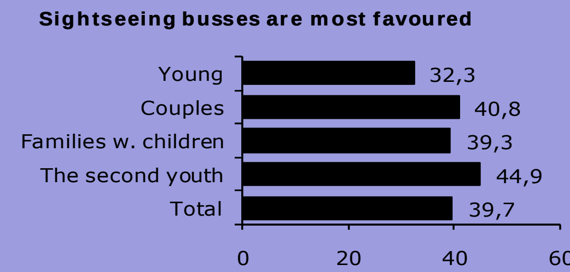
While in the city they also want to visit specific attractions – it can be seen as an indicator that tourists are planning bits and pieces regarding their trip beforehand.

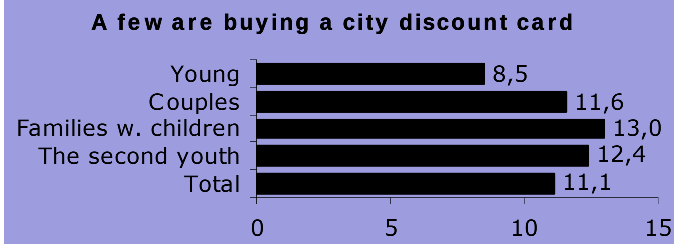
Differences in desire to party and meet locals

The couples in general and the young in particular want to party and have fun and get in touch with the locals.

Motivation for experiencing a specific city for the young segment are especially determined by the atmosphere of the city.







Sightseeing and discount cards appeal to second youth

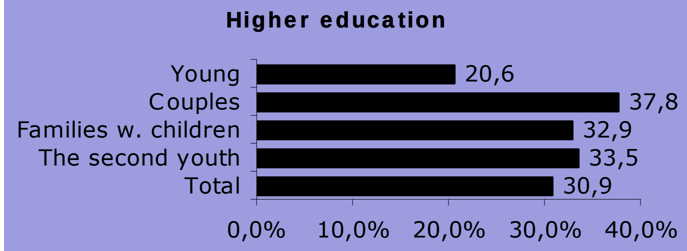
Renting a bike is a young activity

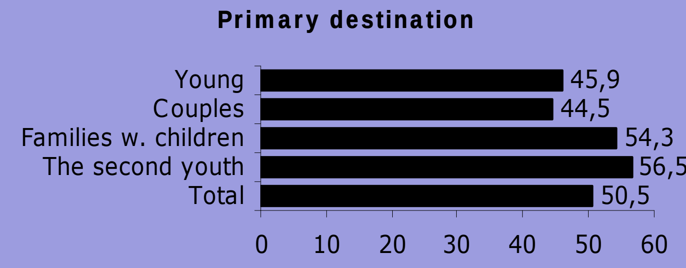
Couples (20,5%) and the young (16,3%) rent a bike when they visit acity. They want to experience the city by themselves and decide what way to go.

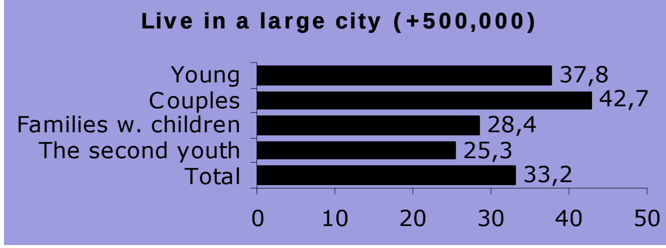
Sightseeing and discount card favoured by second youth

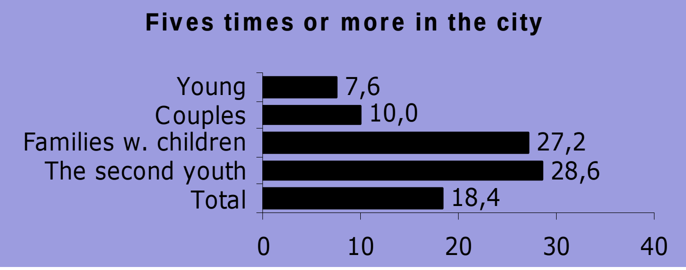
The most favoured form of transportation is still catching a sightseeing bus for a trip around the city.

The city discount card is not popular among the tourists compared to catching a sightseeing bus and seeing the most famous spots from the outside.









The older the tourists, the more the visits

Well educated couples

An analysis of the background variables shows that the tourists are very well educated. 37,8% of the couples and 33,5% of the second youth have a higher education corresponding to a master or Ph.D. Having in mind that the young segment is only 18-25 years old they still have a good proportion of a higher education – or are likely to get one in the near future.

Urban visitors

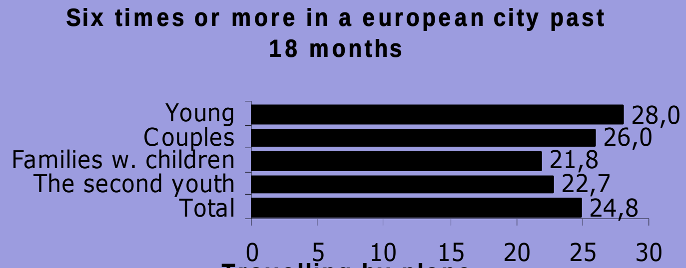
Most of the tourist in the survey live in a larger city. In total 33,2%. When it comes to the second youth, most live in a smaller city (5.000-50.000) – 31,4 % versus the 25,3% who live in a larger city.

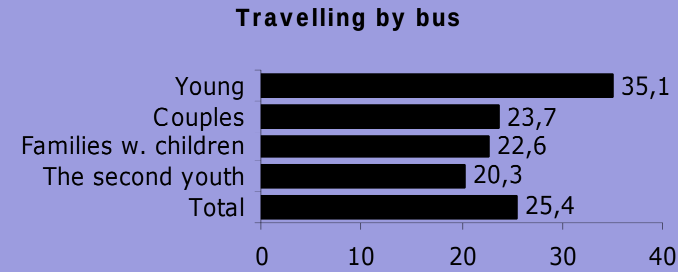
Primary destination for families and second youth

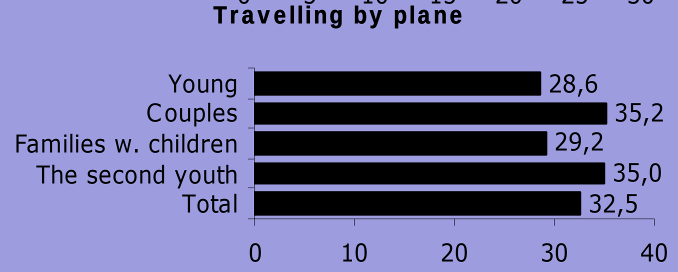
One half of the tourists have the city they visit as their primary destination, which means that they also visit other cities/places on their journey. 16,1% in total are one-day visitors – that means that they can have another city as their primary destination and they only visit the specific city for a shorter period of time.

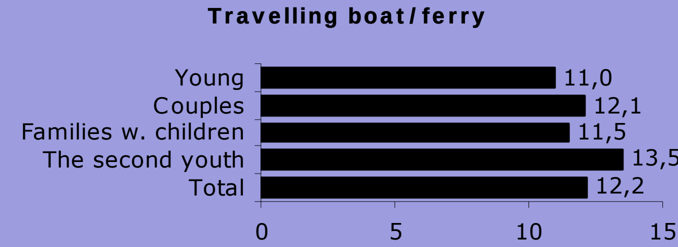
Experienced travellers

The people in the survey are very experienced travellers and 18, 5% have been in the specific city five times or more within the past 18 months. In particular the families with children and the second youth are busy travellers.









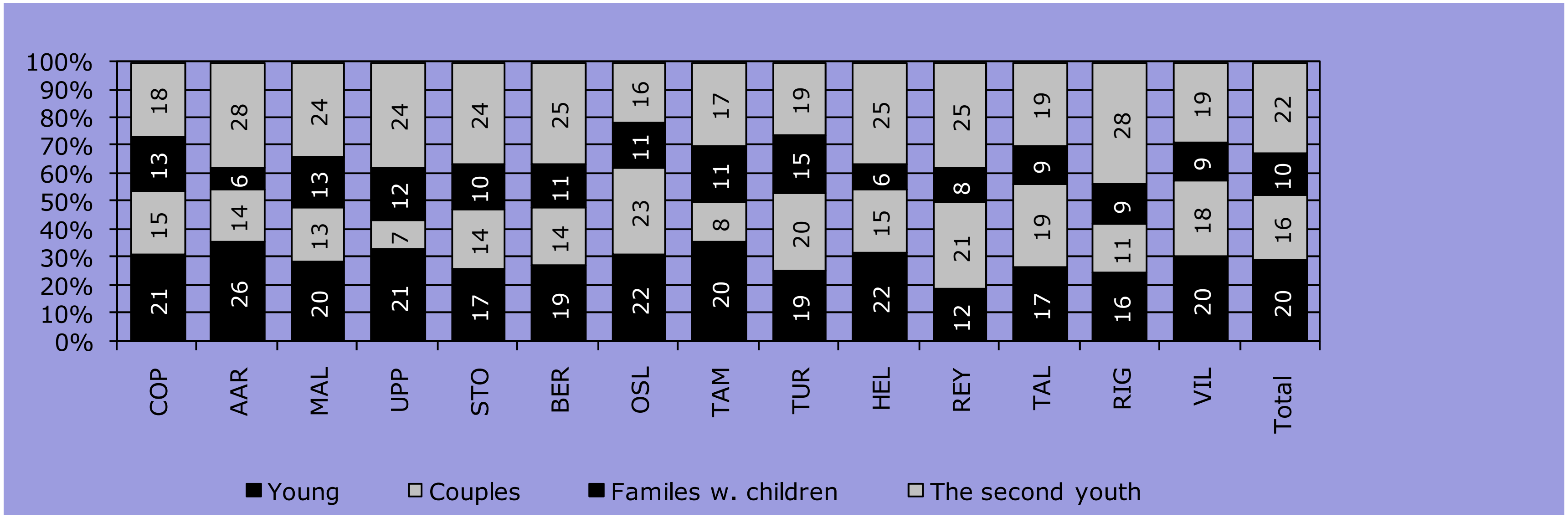
Flying, sailing or driving to the city

Frequent travellers

The tourists are not only visiting the specific city frequently, they also tend to travel around Europe in general. As seen in the table above, 24,8% in total have visited a European city six times or more within the past 18 months. The young and the couples most often visit different cities around Europe.

The young prefer travelling by bus – couples by plane

The young travel by bus where as the second youth and couples travel by plane. Families with children and couples are almost the same when it comes to travelling by either bus or plane. Bus travels are used the least by families with children and the second youth.



Demographic segments in cities

In the diagram above we look at how the demographic segments are distributed/divided in the 14 cities in the survey.

Second youth in Riga and Aarhus

The second youth is the largest segment and well represented in all the cities from 16% in Oslo to 28% in Riga and Aarhus.

Families in Turku

Families with children are most frequent in cities as Turku (15%), Malmo (13%) and Copenhagen (13%). The smaller cities and Helsinki are not the children families' most favoured destinations.

Couples in Oslo

Oslo has the largest share of couples (23%) contrary to Uppsala and Tampere where the couples are represented with only 7% and 8% of the total.

Young in Aarhus

The young segment is smallest in Reykjavik (12%) and Riga (16%) and very well represented in Aarhus (26%), Oslo and Helsinki (22%). Reykjavik differ most from the other cities, since it has most visitors from 'the second youth' and the 'couples' group.

Psychographic segments

s. 89

I want to	Party	Modern	Relax	History	Total
Party and have fun	**42% (+)**	11% (-)	11% (-)	10% (-)	21%
Know more about the city and history	27% (-)	**68% (+)**	58%	**100% (+)**	57%
Get in touch with the locals	**31% (+)**	23%	21% (-)	17% (-)	24%
See new, modern and different places	17% (-)	**100% (+)**	40%	0% (-)	39%
Visit the city's historical museums	25% (-)	**45% (+)**	38%	**47% (+)**	37%
Experience the cultural life, e.g. theatres	**30% (+)**	**29% (+)**	23% (-)	16% (-)	25%
See the most famous attractions	37% (-)	**49% (+)**	43%	**48% (+)**	43%
Do shopping	**37% (+)**	26% (-)	30%	13% (-)	29%
Do exclusive shopping	**4% (+)**	2%	2%	1% (-)	3%
Engage in a special hobby/interest	**11% (+)**	5% (-)	6% (-)	3% (-)	7%
Experience the city's underground	**18% (+)**	10%	8% (-)	5% (-)	11%
Visit some of the trendy in-places	**22% (+)**	12% (-)	10% (-)	4% (-)	14%
Go to attractive restaurants & cafes	**33% (+)**	24% (-)	**32% (+)**	15% (-)	28%
Spend time with friends/family	**33% (+)**	14% (-)	**34% (+)**	8% (-)	25%
Relax and recharge	12% (-)	0% (-)	**99% (+)**	0% (-)	32%
See less-known exclusive attractions	17%	13%	**18% (+)**	10% (-)	15%

Four psychographic segments

Constructing the segments

The tourists were given 16 alternatives as to what activities they wanted to take part in during their stay in the city. These activities can be seen in the table above. In average, each tourist ticked off 4,3 alternatives out of the 16.

In order to find a pattern among the answers, the answers were put through a cluster analysis, resulting in four different segments with different desires for activities. Of course, the tourists in each segment are not listing the exact same activities, hence each segment is NOT to be mistaken for a typical tourist but should be perceived as a stereotypical image. Many tourists will probably act out a combination of all segments.

Different tourists, different inclinations

The table above shows the results of the cluster analysis. Each cell shows how inclined each segment is to take part in a specific activity (e.g. 42% of the party tourists want to party and have fun).

Each cell also reveals if that particular percentage share of each segment differs significantly from the overall average.

For example, 100% of the history tourists want to know more about the city and its history, which is of course a significant difference to the overall average (57%). Only 27% of the party tourists want to know more about the city's history.

In this regard, the table reveals how many activities each segment represents. The party tourists is the segment with the widest variation in answers, wanting to do 10 of the 16 activities significantly more than the average. The party tourists want a lot of different things but most of all, they do not want to be like other tourists.

All the tourists in each of the three other segments have one specific activity in common. 100% of the modern tourists want to see places that are new, modern and different. 100% of the history tourists want to know more about the city and its history. And 99% of the relaxing tourists want to relax and recharge for work.

'know more about the city and its history'

'visit the city's historical museums'

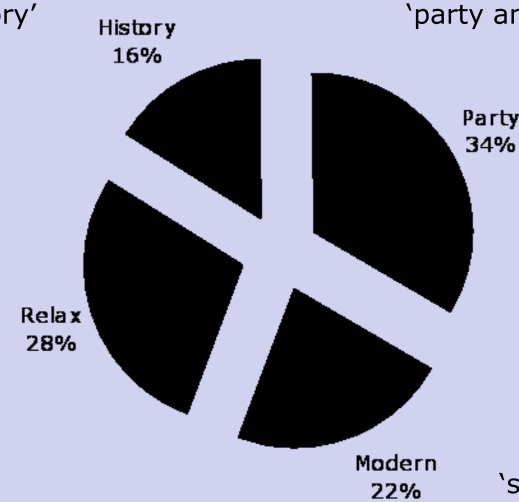
'see the most famous attractions'

'party and have fun'

'do shopping in general'

'get in touch with locals'

'visit some of the trendy in-places'



'go to restaurants/cafes'

'spend time with family/friends'

'relax and recharge batteries'

'see the most famous attractions'

'know more about the city and its history'

'see new modern and different places'

4 psychographic segments

Party tourists

This is the most diverse of all four segments, in the sense that these tourists say they want to do a lot of different things. Nevertheless, the most general characteristic is that the tourists within this group are out to party and have fun and experience everyday life in the city. Some of the activities where significantly more party tourists share an interest, compared to the other segments, is to visit some of the trendy in-places, experience the city's underground environment and go shopping. At the same time they are less interested in history.

Modern tourists

The modern tourists are looking for new, modern and different places in the city. As such, they wander around to feel the atmosphere and see interesting hotspots. But they are not only looking for modern places, they also want to know more about the history of the city and see the most famous attractions.

Relaxing tourists

The relaxing tourists are different from the other groups because all the tourists in this group primarily want to relax with the friends and/or family they travel with. However, this does not mean that these tourists do not experience the city. They just tend to do it slower and with the well-being of their travel group as top of mind.

History tourists

This segment is very similar to the modern tourists, since both segments are interested in seeing the most famous attractions. However, whereas the modern tourists mainly want to experience the new, modern and different, the history tourists mainly want to find the more historical elements in the city as well as in museums.

The nice summer-evenings in the city with much music

Best experience in Riga said by German tourist

Not to spend too much time in museums and cultural attractions but to live the town, enjoy the atmosphere itself, and even get to know someone local. But also a trip to Christiania and an open sandwich from Ida Davidsen

What to do in Copenhagen said by an Italian tourist

Reach interesting places on foot; go to a cafe, (to have a rest on your way) do not miss the nightlife with interesting events

What to do in Helsinki said by a Russian tourist

Party tourists

Party plus a lot more

34% (1.676 respondents) of all tourists can be placed in the segment labelled "party tourists". This makes it the largest segment of all four.

The activity that most of the tourists share is … nothing and all. The answers are widespread, the segment is very diverse, so no single words or activities explain everything. To party and have fun is an activity preferred by 42%, while other equally popular activities include shopping (37%), attractive restaurants & cafes (33%) and spending time with family & friends (33%).

An interesting finding that goes for all segments is that the traditional background variables, such as age and gender do not really differ that much from segment to segment. Still, there seem to be some tendencies which can describe this segment deeper.

The party tourists score lower than the average in almost all aspects, whether it be activities, inspirations or reasons to go. The relative and significant differences between this and the other segments are largest in some of the following aspects:

The party tourists …

- have a higher share of men than the average
- travel with friends
- do not travel with children
- are 18-25 years old
- are inspired to go because they want to visit tourists they know
- have the night life of the city as a reason to go
- want to rent a bike
- have visited the city many times before, often five times or more
- are mostly from Germany and Finland
- come to go to a specific event or a stage performance more often than average.

Visit the city centre and the redeveloped harbour areas

What to do in Copenhagen said by a Dutch tourist

Visit the modernist architecture besides the historical part of the city

What to do in Riga said by a Spanish tourist

People are very friendly and helpful. Public transportation is very useful and convenient. Impressed by the modern design of architecture, which is well blended with historical sites

Best experience in Malmö said by an Asian tourist

Modern tourists

Modern with a twist

22% (1.125 respondents) of all tourists can be placed in the third largest segment, labelled “modern tourists”.

The activity which is the most popular in this group is to see new, modern and different places (100%). The tourists also want to get to know more about the city and its history (68%) and see the most famous attractions (49%). As such, these tourists are trying to get to know the city better in its diversity. Even though the new, modern and different places are the most important motivations for their visit, they want to see more of the city than just the modern places.

The modern tourists…

- travel with children more often than the average
- are overrepresented in the age group 41-50 years and +61 years
- have shorter stays than average
- have the atmosphere of the city as reason to go as well as architecture and design of the city plus the history
- choose the city because of recommendations and are likely to want to meet locals
- search inspiration from many different sources to a higher degree than other segments, e.g. the official tourism website, the Internet, brochures, guide books and written articles
- have decided to go to specific streets and places in the cities beforehand
- are mostly from Spain
- live in a large city in their home country

Eat dinner at the Little Square and at a Thai restaurant in Admiralsgatan. Shopping, relaxing and walks in the parks, enjoy old architecture and history of the city

What to do in Malmö said by a Danish tourist

Listen to music, Stroll around old town, go to a café, relax with spa treatments, in short, enjoy!

What to do in Tallinn said by a Swedish tourist

Stroll along the small river and eat in Saluhallen

What to do in Uppsala said by a Swedish tourist

Relaxing tourists

Relax, take it easy, tomorrow …

28% of the tourists can be placed in the segment called "relaxing tourists". With 1,423 respondents, it is the second largest segment of the four.

As the label suggests, these tourists are basically more interested in relaxing (99%) and hanging out with friends and family (34%) than they are in any other city attraction. Another thing that characterises the relaxing tourists is the fact that they want to go to attractive restaurants and cafes (32%) a bit more than the average of all. Last but not least, they are significantly more interested in going to see less-known but exclusive attractions (18%) – probably places without too many people around to stress them out.

As mentioned in relation to the other segments, the differences between the segments are not too dramatic, but still the relaxing tourists can be described through some certain characteristics, which show they are a bit or a lot different from the other three segments.

The relaxing tourists …

- travel with a partner more often than the average
- stay longer than the average
- are overrepresented in the four age groups between 26 years and 60 years
- Have eating and drinking as a reason to go more than the other segments – the same goes for spending time with a travel group
- want to go on an arranged sightseeing tour
- want to buy a transportation card
- are mostly from nearby markets and/or domestic markets such as Sweden, Finland and Denmark.

You can NOT go to Stockholm without visiting the old part of the city

What to do in Stockholm said by a Spanish tourist

Learning more about the Vikings with an excellent guided tour provided by the museum. And the museums were free!!

Best experience in Oslo said by an Australian tourist

I recommend to go and visit the museums, the shops, go for a walk around the city...

What to do in Tampere said by a Portuguese tourist

History tourists

History tourists

The segment "history tourists" sum up to 816 respondents or 16% of all tourists. That makes this segment the smallest one of all.

The one thing that motivates all history tourists is to get to know more about the city and its history (100%). One of the ways of doing this is to go to the historical museums, which is of interest to nearly half of all history tourists (47%). A bit more (48%) of the history tourists want to see the most famous attractions.

The history tourists …

•come for shorter stays than the average tourist and represent the highest share of one-day visitors

•are overrepresented in the age group 41-50 years, 51-60 years and significantly more in the +61 years group

•unsurprisingly have history as reason to go

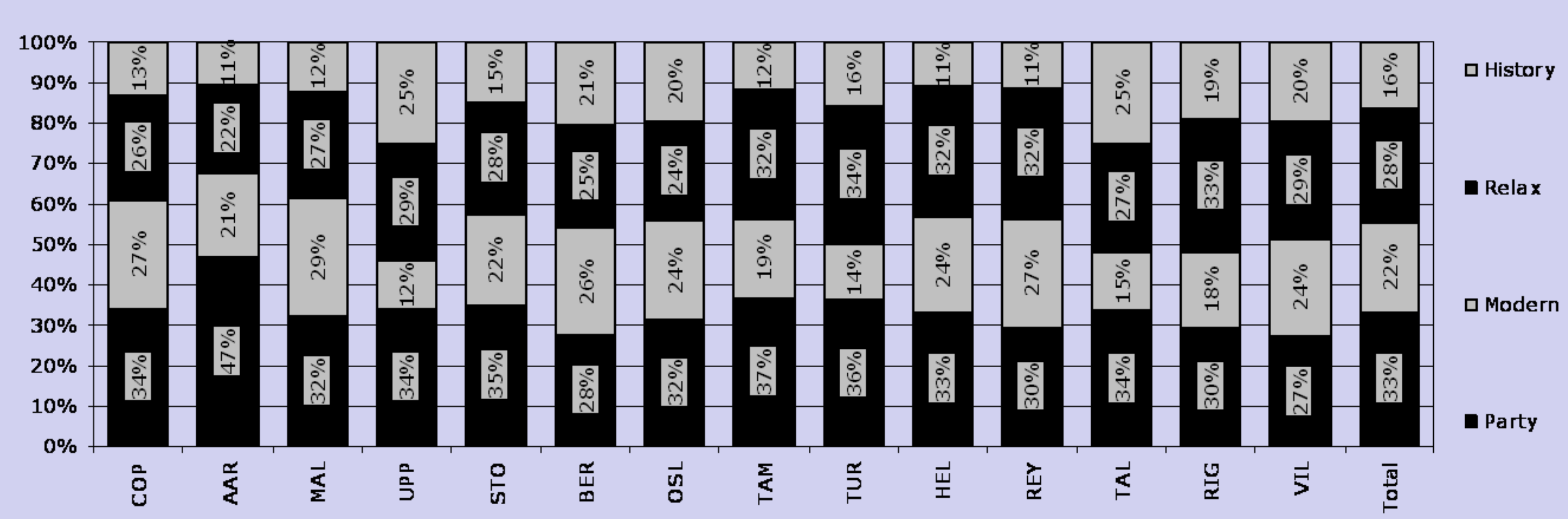
•do not bother about eating and drinking, shopping and night life (compared to other segments)

•have already decided to go to a specific museum but are the least interested in events

•are mostly from markets such as Italy and USA

•have a higher level of education than average

•are first time visitors to the specific city and in general travel less to cities than other segments.



Psychographic segments in cities

The table above shows how each city's share of segments looks, compared to all other cities and the total average.

A lot of party tourists in Aarhus, Tampere and Turku

Three of the smaller cities in the survey, Aarhus, Tampere and Turku have the highest share of party tourists. Aarhus has the highest share of party tourists with 47% of the tourists going out to party, meet locals etc. The average is 33%. The cities with the lowest share of party tourists is Vilnius (27%) closely followed by Bergen (28%). But still, Bergen has this segment as their largest segment, relative to the other segments.

Many modern tourists in Malmo, Reykjavik and Copenhagen

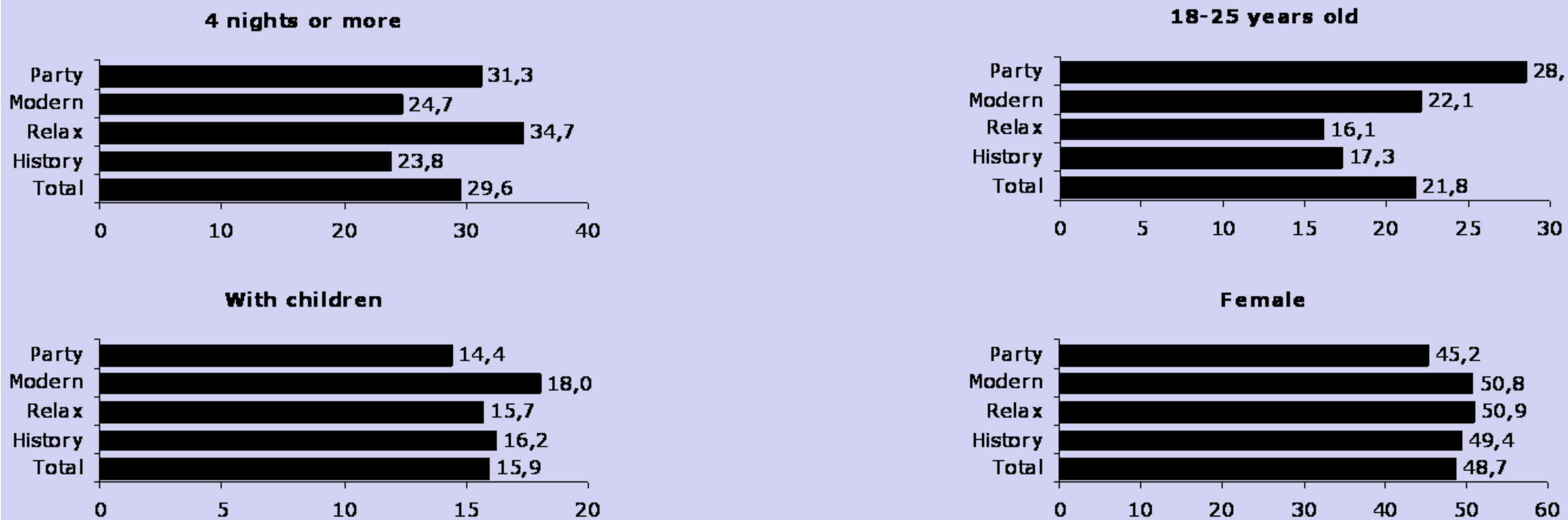
Malmo has 29% modern tourists compared to the average of 22%. Copenhagen and Reykjavik share the second place with 27% of their tourists being modern tourists. Uppsala, Turku and Tallinn have a much lower share with 12%, 14% and 15%, respectively.

Relaxing tourists are well-represented in most cities

The relaxing tourists is the segment which has the least widespread share in all cities. There is a range from 22% in Aarhus (the lowest share) to 34% in Turku (the highest share), with an average of 28%. The relaxing tourists is an important segment for all cities, no matter what

History tourists in the top

Uppsala, Tallinn, Bergen, Oslo and Vilnius all have a share of history tourists well above the average of 16%. Uppsala has the highest share with 25% history tourists. In the other end of the spectre, Aarhus, Helsinki and Reykjavik have a much lower share of 11%.



Similarities and differences

Relaxing tourists stay longer – history tourists shorter

It seems that the longer the tourists stay, the more relaxed they allow themselves to be. Three out of ten tourists state they stay four nights or longer. 35% of the relaxing tourists stay for this long, while 24% of the history tourists stay for that amount of time. Looking at one-day visitors, the opposite tendency shows (in average) that 16% of all tourists are one-day visitors, while 11% of the relaxing tourists and 19% of the history tourists are staying in the city for one day only.

Almost same share of families with children

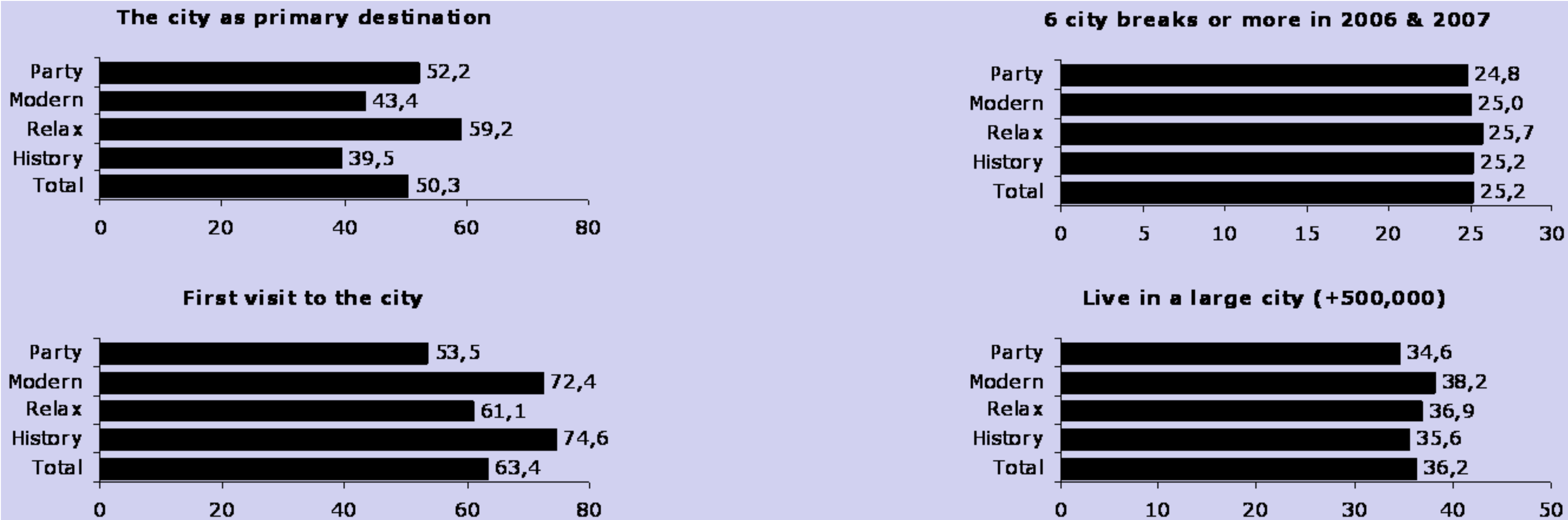
Having children do not seem to make a big difference in terms of what tourists want to do on their holiday.
Hence, there is almost no difference in the share of families with children in the different segments. The biggest difference is found between party tourists, who holds the smallest share of children families (14%), and modern tourists who comprise the largest share (18%).

Party tourists are younger

People's age discriminate their behaviour and motivation to some extent. 29% of the party tourists are found in the age group 18-25 years old, while only 16% of the relaxing tourists are in this age group. Looking at other age groups, it is interesting to see how for instance, the history tourists get more and more represented in the older age groups. The relaxing tourists are overrepresented in the three age groups, the 31-40, 41-50, and 51-60 year olds. The modern tourists are almost distributed equally into the age groups as the average tourists.

Fewer woman want to party

The gender distribution is almost the same in all segments with the one exception that 45% of the party tourists are women, while the average as well as the distribution in other segments is closer to a fifty-fifty.



Similarities and differences

Relaxing tourists are most loyal

In average, it is only about half the touristswhohave the city as the primary destination for their holiday. But while only 40% of all history tourists have thecity as primary destination, 59% of the relaxing tourists have the city as their primary holiday destination. The history tourists and modern tourists seem to be interested in experiencing more thanwhat is possiblein one city. They are most likely also visiting other cities during their holiday.

First-timers history tourists and modern tourists

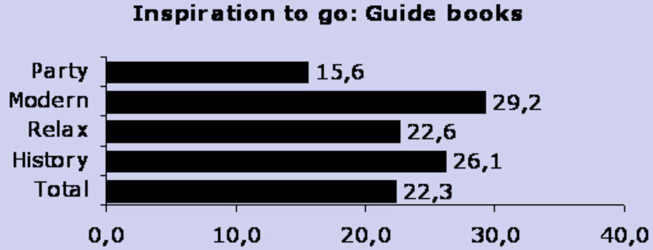
On the one hand app. three out of four tourists in the segments ‘history tourists’ and ‘modern tourists’ experience their first visit to the city. On the other hand, there are many repeated visitors in the segment ‘party tourists’, where 24% have been to the city five times or more before.

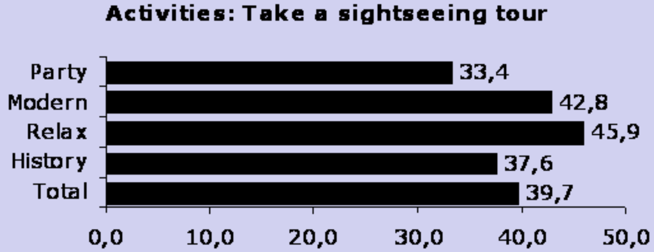
A lot of frequent travellers

There is no significant difference between the segments in terms of travel frequency.Manyof the tourists are have a lot of routine in travelling. Hence, one out of four tourists have been on six or more holidays to European cities within the period January 2006 to July 2007. Only 10% state that the visit to the city was their first city break in the one and a half year period. More than 50% have travelled to European cities two, three or four times.

Cosmopolitan tourists

More than one third of all tourists live in a city with more than 500,000 inhabitants. There is no significant difference between the segments, but the party tourists seem to be less cosmopolitan themselves compared to especially the modern tourists.





Similarities and differences

Modern tourists like guide books

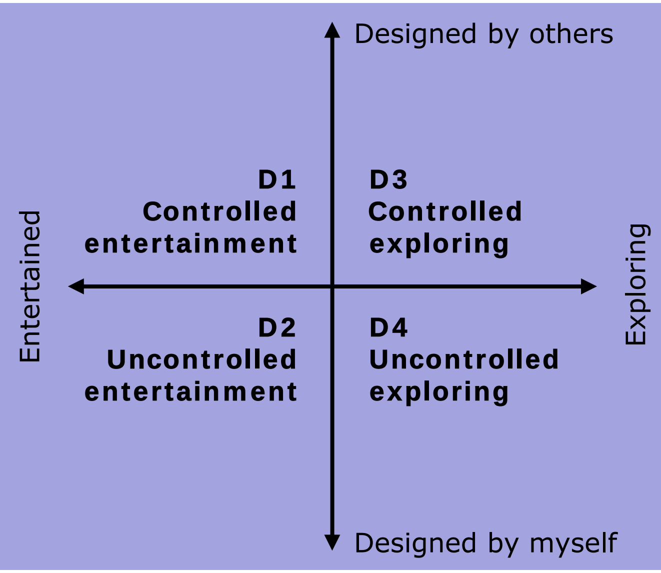
When the tourists were looking for inspiration for where to go, an average of 22% consulted guide books. Only 16% of the party tourists did so, while 29% of the modern tourists skimmed through guide books for inspiration. The segments are also significantly different when it comes to looking for inspiration in e.g. tourism brochures (23% of the modern tourists vs. 13% of the party tourists) and a previous visit (25% of relaxing tourists vs. 11% of history tourists).

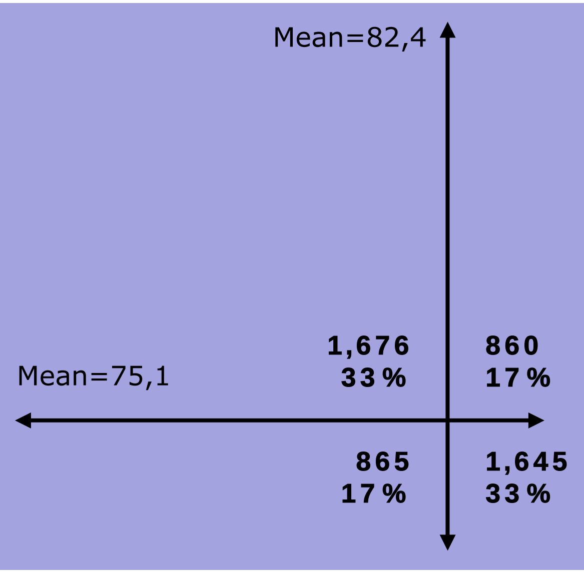
Sightseeing tours appeal mostly to relaxing tourists

It is of course not surprising that arranged sightseeing tours appeal most to the relaxing tourists (46%) and least to the party tourists (33%). Probably, the most surprising finding is the fact that one out of three of the party tourists actually do want to go on some kind of an arranged sightseeing tour. Other interesting differences include visiting a specific museum (36% of the party tourists vs. 56% of the history tourists) and attending an event (17% of party tourists vs. 10% of history tourists).

Experience design segments

S. 100





Four experience design segments

Constructing the segments

The tourists were asked to mark how they want to experience a city when travelling. Four different sets of statements were presented - two of the most discriminating were used to segment the tourists:

- To be entertained vs. to explore on your own
- Experiences designed by others vs. designed by yourself

For each set of statements, the tourists had to place a mark on a line, using a scale from 1-100. Hence, each tourist can be given a value as to how much they want to explore on their own and design by themselves, thereby giving each tourist a cross in the experience design diagram.

Many tourists placed their marks on both the more self-exploring and self-designing half of the two sets of statements (above the natural mean at 50), so instead the mathematical mean has been used to divide the segments into four different groups (see the figure to the right above).

Two of the segments are almost the same size; the controlled entertainment segment (D1) and the uncontrolled exploring segment (D4) represent two-thirds of all tourists, while the last third is divided into two equally large segments, namely uncontrolled entertainment (D2) and controlled exploring (D3). The reason these two pair of segments are the same size is that the means have been used to calculate them.

The controlled entertainment segment represent tourists who like to be entertained and do not feel strongly about deciding and designing experiences themselves. The uncontrolled exploring segment represent tourists with a more futuristic mindset about tourism; they want to explore and co-design their experiences, they want to stay off the beaten path. While these two segments are the same size, it is important to notice that the 33% in the uncontrolled exploring segment represent app. 5% of the total answer possibilities, while the 33% in the controlled entertainment segment represent app. 60% of the total answer possibilities.

As such, there is significant tendency of the tourists to place their mark to the more explorative, own-designing side of the experience design (and in the definition marked D4 by the research team). Hence, we have decided to include this segment in the further analysis, even though the essay conceptualising experience design suggested that D4 should be left out of the question.

The reason for leaving D4 out of the analysis within the essay was that 'the experience design of D4 is purely phenomenological and individual – and is as such out of reach for the production side of the experience' (see Experience design as a concept p. 7).

However, in practice, it turned out differently. Even though a lot of tourists said they were explorative and design everything themselves, their specific activities are not completely different from other tourists (35% still want to go on an organised sightseeing tours). Being an uncontrolled exploring tourist seem to be more a matter of the attitude to being a tourist than the action itself.

Controlled & uncontrolled entertainment (D1 & D2)

Controlled entertainment (D1)

33% (1.676 respondents) of all tourists can be placed in the upper left corner of the cross diagram, which theoretically reveal that these tourists are more interested in experiencing the city in a passive and supervised way compared to the other tourists. They are happy to engage in experiences which have been designed and decided by others, and those which can be enjoyed without too much effort and exploration.

These tourists:

•More often travel with children (30% vs. 19% for all)

•Are not so motivated by architecture and design (35% vs. 42%), the atmosphere (45% vs. 51%) and meeting the locals (13% vs. 16%)

•Find inspiration in tourist brochures (20% vs. 17%)

•Are not so interested in visiting historical museums (33% vs. 37%) – instead they prefer to take a sightseeing bus (43% vs. 40%)

•Do not want to rent a bike (11% vs. 14%)

•Do not use walking around the city as inspiration in deciding what to do (50% vs. 55%)

•Often live in a small city (28% vs. 23%)

Uncontrolled entertainment (D2)

Uncontrolled entertainment (D2)

17% (865 respondents) can be placed in the lower left corner, making them tourists interested in uncontrolled entertainment. Or in other words; they want to be entertained but they also like to co-design the entertainment.

These tourists have characteristics such as:

•Travel with friends more often (28% vs. 25%)

•Are more often young between 18-25 years (30% vs. 22%)

•Enjoy shopping (21% vs. 18%)

•Night life is a reason to go (13% vs. 10%)

•Use recommendations for inspiration (32% vs. 30%)

•A previous visit is also good inspiration (21% vs. 18%)

•Want to party and have fun (28% vs. 21%)

•Are interested in underground environments (14% vs. 11%)

•Are not that interested in taking a sightseeing bus (33% vs. 40%)

•Walk around the city to decide what to do (61% vs. 55%)

•Do not use guidebooks very much (38% vs. 42%)

•Drive in a private car (27% vs. 23%)

•A few are travelling by plane (29% vs. 34%)

•Have been in the city five times or more (22% vs. 18%)

Controlled exploring (D3)

Controlled exploring (D3)

17% (860 respondents) of all tourists can be placed in the upper right corner of the cross diagram. In this segment, the tourists are more interested in exploring the city themselves, but still, they also like to have a certain degree of their experiences designed by others, e.g. guide companies, guide books or tourism organisations. They are happy to engage in experiences which have been designed and decided by others, but they still want to have an active role in the experience.

These tourists:

- are females (53% vs. 47%)
- travel with children (18% vs. 16%)
- are more often 61 years+ (12% vs. 9%)
- have history of the city (43% vs. 39%) and architecture and design (47% vs. 42%) as reasons to go
- seek inspiration in tourism brochures (19% vs. 17%) and guidebooks (26% vs. 22%)
- are not so interested in shopping (16% vs. 18%) and night life (7% vs. 10%)
- are not so motivated to party and have fun (16% vs. 21%) or shopping (25% vs. 29%)
- are motivated by the city and its history (43% vs. 37%) and the most famous attractions (49% vs. 43%)
- visit specific attractions (73% vs. 70%) and museums (50% vs. 46%)
- rent a bike (16% vs. 14%) and buy traditional souvenirs (21% vs. 18%)
- use the tourism information (62% vs. 58%), guidebooks (50% vs. 42%) and printouts from websites (17% vs. 14%) when deciding what to do
- are in the city for the first time (71% vs. 63%)
- do not have the city as their primary destination (53% vs. 48%)

Uncontrolled exploring (D4)

Uncontrolled exploring (D4)

33% (1,646 respondents) of the tourists are found in the lower right corner of the cross diagram, making them tourists who are interested in uncontrolled exploring. Or in other words; these tourists are very difficult to serve seen from the producer's point of view, since they do not want to be entertained, decided for or told what to do. They are most satisfied when they explore the city on their own, where preferably no other tourists are.

These tourists:

•are not very often one day visitors (16% vs. 14%)

•travel with their partner (46% vs. 43%)

•do not often travel with children (16% vs. 13%)

•sometimes travel alone (17% vs. 15%)

•are a little older than 18-25 years (18% vs. 22%)

•find that meeting the locals is a good reason for visiting the city (20% vs. 16%)– not shopping (15% vs. 18%)

•get inspiration from guidebooks (25% vs. 22%) and no to often tourism brochures (15% vs. 17%)

•are indeed motivated to meet the locals (28% vs. 24%), the cultural offers (29% vs. 25%), the underground environments (14% vs. 11%) and the less known but exclusive attractions (18% vs. 15%)

•want to visit specific museums (49% vs. 46%), go to specific places and streets (63% vs. 56%) and rent a bike (17% vs. 14%)

•do not want to take a sightseeing bus (35% vs. 40%)

•for many it is the first time in the city (67% vs. 63)

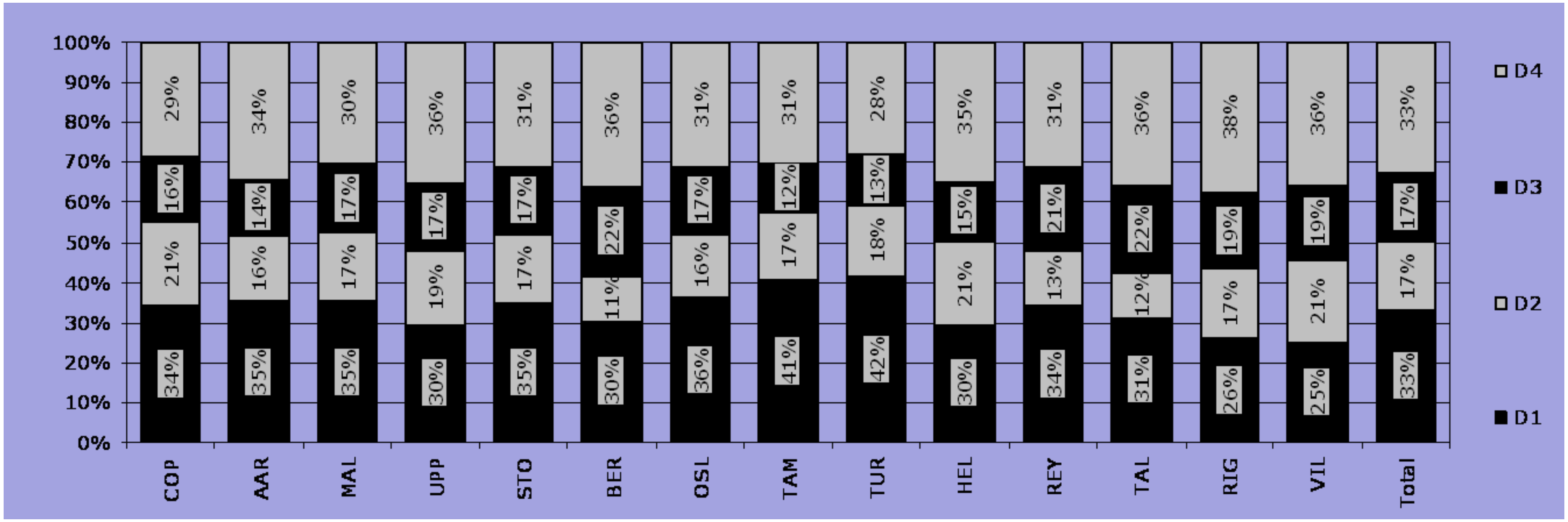
•they have been in a European city six times or more within the past 18 months.

•walk around the city (58% vs. 55%) and read in guidebooks (48% vs. 42%)when deciding what to do

•live in a large city (+500.000) (41% vs. 36%)

•have a higher education (38% vs. 32%)

•do not have the city as their primary destination (54% vs. 48)



Experience design segments in cities

The table above shows how the four experience design segments are distributed across all 14 cities.

While D1 and D2 represent the more traditional stereotypical tourist who wants to go on sightseeing etc., D3 and D4 give an image of a more modern tourist who basically do not want to be like other tourists. The average for all cities is fifty-fifty to both sides.

More explorative tourists in Bergen

Cities such as Bergen, Tallinn and Riga have a higher share of tourists from the more explorative segments D4 and D3. Uppsala and Bergen have a share of 36% of the uncontrolled exploring segment, but Riga is top scorer with 38% of all tourists being uncontrollable explorative tourists. Turku and Copenhagen have the smallest share with 28% and 29%, respectively.

Tourists in Turku and Tampere want to be entertained

The controlled entertainment segment is largest in Turku with 42% of all tourists, closely followed by Tampere with a share of 41%. In the other end of the scale, Vilnius and Riga have the lowest share of the controlled entertainment with 25% and 26%, respectively.

Qualitative answers

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Qualitative answers

In the questionnaire the tourists were given the opportunity to give open answers in different categories. In this section three of these categories and the answers given will be analysed – it concerns the areas 'streets/squares visited', 'inspiration to go' and 'best experience'.

When we look at the answers to these questions we can get a better picture of how the choices are made or not made before, during and after the tourists' holiday.

The first two questions are from the first part of the questionnaire:

1. Which specific streets and/or squares do you plan to visit or have already visited?

2. How and where did you get inspired to travel to the city (if inspiration different from the ones indicated)?

The third question is from the second part of the questionnaire:

1. If you look back on your trip/vacation, what experience was the best and most memorable while you were in the visited city?

Typical sights, aimlessly wandering or no plans

When tourists are asked to indicate which streets and squares they have visited in the city or plan to visit, three kinds of groups appear:

1. Tourists who visit typical tourist places

“The ones that the tourist information office suggest” (tourist in Copenhagen)

“All the popular ones” (tourist in Copenhagen)

“Old Town, obviously” (tourist in Tallinn)

“The walking tour in the lonely planet” (tourist in Reykjavik)

2. Tourists who walk around the city with no specific attraction in mind

“[I’ve] been looking around the older buildings … nothing specific” (tourist in Copenhagen)

“We have had a look around the city centre, just looking at all streets in the area” (tourist in Aarhus)

“Walked along the river, don’t know what all the places are called” (tourist in Uppsala, translated from Swedish)

“Strolled around the old town” (tourist in Riga)

3. Tourists who just arrived and have not made any plans prior to the visit

“Just follow the maps, its good enough for me” (tourist in Copenhagen)

“None specifically, just to wander around” (tourist in Stockholm)

“Just got here, not sure yet” (tourist in Stockholm)

“Just walking around in the city” (tourist in Vilnius)

Tourists’ personal inspiration

When asking tourists how they got inspired to come to the city, they had the opportunity to mark various answers – yet, here they could also write something not already indicated. Many different answers emerged and like before it is possible to categorize these.

Many of the same quotes reappear in the different cities, especially tourists being on a cruise-holiday and thus follow the itinerary. Many tourists also wrote about transportation inspirations, especially cheap flight tickets and direct train connections. Finally, many tourists indicated that inspiration was not an issue since they were in the city for work reasons. As such, the quotes below are examples from specific tourists – they could easily have been from tourists in many of the other cities, though.

Tag along, easy accessibility or personal reasons

The first group is tourists who did not get inspired themselves, but ended up in the city, either due to their partner’s interests, work or as a part of a longer journey:

“On route for where I want to get to” (tourist in Copenhagen)

“Cruise start” (tourist in Copenhagen)

”Prearranged conference” (tourist in Copenhagen)

“I was in Stockholm and Copenhagen and decided to visit Malmo” (tourist in Malmo)

“Came with wife who is on business” (tourist in Stockholm)

“On the way to the North Cape” (tourist in Oslo)

“Part of cruise” (tourist in Helsinki)

Second group is tourists who got inspired to come because of cheap and easy transportation opportunities:

“Easy to reach to from Hamburg” (tourist in Copenhagen)

”Scanrail Berlin-Malmo” (tourist in Malmo)

”I was in Iceland and had a chance to stop over on my way back to my business in Russia” (tourist in Malmo)

“Ability to layover on my way to Europe” (tourist in Reykjavik)

“Random pick from low cost flight website” (tourist in Stockholm)

“Cheapest route from Sweden!” (tourist in Turku)

“Got a cheap flight ticket” (tourist in Riga, translated)

Third group is tourists who came due to a more personal inspiration:

“My mother and I wanted to try something new” (tourist in Malmo, translated)

“Historical interest” (tourists in Tallinn, Vilnius and Malmo)

“General curiosity” (tourist in Tallinn)

“Seeking the unusual” (tourist in Helsinki)

The tourists' best and worst experiences

The second part of the questionnaire also contained open questions, where tourists were asked to tell about their best and worst experience while being in the respective city. Concerning the best experience the majority of tourists indicate walking around in the city on their own as the best experiences.

Fewer tourists write about certain restaurant-visits as the best experience and even fewer tourists mention a museum or specific attraction as the best experience. As such, this once again shows how tourists prefer to experience the city on their own, albeit these "walking tourists" can be divided into two groups.

The best experiences are divided into three groups which are presented in the following three pages. Afterwards quotes of worst experiences are presented.

Strolling around town

First group is tourists whose best experience was to take a stroll around the city with no specific purpose other than to obtain a sense of the city atmosphere.

“Just walking around aimlessly in the old town” (tourist in Vilnius)

”My best experience was to walk around the city and feel the atmosphere, beautiful architecture, nice churches and buildings” (tourist in Vilnius, translated)

”I think the best experience I/we had was strolling around the old city absorbing the unique historical atmosphere” (tourist in Vilnius)

“Best was the feeling I had while roaming the small streets in the old town” (tourist in Riga)

“Getting lost around all the streets and discovering something new around each corner” (tourist in Tallinn)

“I particularly love to roam about the streets and discover quant little streets full of life” (tourist in Helsinki)

“Enjoyed to have a chance to visit the less touristic places of the city where locals go” (tourist in Oslo)

Famous attractions were the best

Second group is tourists whose best experience was to walk around the city looking for the famous tourist attractions:

“Relaxing day walking around and visiting sites in Old Town” (tourist in Riga)

”It is wonderful to be able to walk on foot to all the attractions in Reykjavik” (tourist in Reykjavik, translated)

“Walking around the city and seeing the beautiful architecture of the churches and cathedral!” (tourist in Helsinki)

“Wandering aimlessly through the streets one Saturday evening in August only to turn the corner into a narrow lane jostling with hoards of people and a live band! So, I just joined the party!” (tourist in Helsinki)

“To walk around in Gamla Stan, away from the main streets as well as a stroll in between museums on the island” (tourist in Stockholm, translated)

”We had marvellous weather, took a lovely walk around town where we saw plenty of attractions” (tourist in Malmo)

“Taking a walking tour of Copenhagen, hitting as many of the sites as possible–walking to the Little Mermaid, walking through where the Queen lives, going to a church, and seeing all the beautiful water fountains” (tourist in Copenhagen)

Interacting with local people

Third group is tourists who regard meeting local people was the best experience:

”That the local people were so open, friendly and helpful. I never felt unsafe during my entire stay regardless the hour of the day” (tourist in Vilnius, translated)

”The people are nice. The people are willingly to help the tourist on street” (tourist in Reykjavik)

“The best experience in Helsinki for me was what to meet the local people” (tourist in Helsinki)

“Talking to the local people” (tourist in Oslo)

“Just being with Danes, the laid back attitude and friendly helpfulness has been wonderful. There is always somebody to answer your questions and to explain some of the slightly strange workings of society” (tourist in Aarhus)

“Great friendly and helpful locals (and they all spoke English!)” (tourist in Copenhagen)

What was not so good...

All in all, the tourists in the 14 cities agree that exploring the city on their own, meeting local people and enjoying a good time with family and/or friends are all factors that indicate good tourism experiences. Meanwhile, tourists were also asked to tell about their worst experience while on holiday. Here some tourists write about the weather, the price level and bad restaurant visits. However, most tourists write about transport to/from the city as bad experiences, as the following quotes indicate:

“Definitely the traffic!! Pretty chaotic. And VERY expensive parking!!” (tourist in Helsinki)

“In the morning there was no bus to airport” (tourist in Tampere)

“I didn't understand how to pay the fare of the bus. I would like to you show us clearly how to get to the bus and pay the fare with brochure or signboard” (tourist in Uppsala)

“Trying to understand the whacky public transport zone system” (tourist in Copenhagen)

The tourists tend to be parted in three groups when it comes to bad experiences: those who had none, those who had one or more and those who had one bad experience, which did not influence the total experience.

Desk research

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Introduction

The results from the extensive desk research are presented in the following section. The desk research has sought to cover different topics related to experience design and to the field research. Since a large part of the following part of the report deals with different online resources in general and with the new forms of social media gaining popularity in particular, a small consultancy firm set out to write a text introducing the concept of social media, in terms of target segments, communication methods, and guidelines for tourism organisations in terms of how to work with and understand social media. The text originally in Danish has been translated and shortened to the current version.

After the introduction to social media, three social online media websites are evaluated to bring the attention of the tourism organisations to what the tourists really want to experience and have experienced to see if there is a need to change/expand focus from the producers to fit the consumers better. The section will begin with Flickr.com to look at what kind of photos from the 14 cities are being uploaded on this site.

Next, the section will discuss a travel forum and its topics on tripadvisor.com, followed by photos and review topics from virtualtourist.com. The section will then present a comparison between the 14 cities own ranked top attractions, data from the questionnaire and reviews of 'what to do' from virtualtourist.com. These sites were chosen mainly due to their size; flickr is the largest photo sharing community and tripadvisor is one of the largest consumer to consumer site and so is virtualtourist. There are of course many other consumer to consumer sites that could be interesting to analyse.

Following the analysis of social media, a brief analysis of the official tourism websites will be presented to compare functions, features and communication on the cities' official tourism homepages.

Please bear in mind that all the websites were visited during Spring 2008 and the amount of photos, reviews etc. have no doubt increased since then. Last but not least, the results of a case analysis of 21 of the more innovative tourism products throughout all cities will be presented.

Social media as a concept

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Social media as a concept

Definition

The social media is an overall definition of the digital space created when photo, video and audio is published by users of social platforms like Facebook, Flickr and other blog universes.

These social media show how a democratization of the online information is taking place – transforming the internet user from being a simple contents reader to being a contents creator.

The fact that the internet user is now also a supplier of contents has meant new demands on the websites where the user is publishing data and at the same time interacting with other users. These websites are often web blogs or big community sites like Facebook, MySpace or YouTube.

The fact that the common internet user is able to generate the contents on the different websites has created the biggest internet revolution since the internet saw the light of day in the 1960'ties. The revolution is often referred to as Web 2.0 – 2.0 representing the new anarchistic internet where everybody is equal.

Introduction

Nothing has changed but everything has changed.

When we travel we experience a city through the story the city tells us. This story can be anything from the small gallery with the charismatic owner, the impressive conference centre by the harbor to the taxi ride back to the airport. Through time these stories have been told by travelers exchanging experiences with family, friends and colleagues.

The social media has made it possible for travellers to make their stories available to the whole world. The stories are now shared on an increasing number of social platforms by means of photo, video, audio and text. Like this, Emil in Copenhagen can now easily share his travel experience with Emilio in Mexico City.

The marketing related monopoly which the tourist organisations used to have is now decentralized to a high extend. Tourist organisations have to face the fact that thousands of personal stories about the city space are uploaded every day on social platforms like YouTube, Flickr and Blogger. When it comes to contents, quality and distribution these little personal tales contrast with the mainstream marketing material which many tourist organisations generate.

Longtail and psychographic

The Longtail Effect was introduced in 2004. The editor Chris Anderson published an epoch-making editorial in the magazine Wired in which he explained how a number of web-based companies like Amazon and Netflix had – unlike most other big successful companies – based their business on selling a wide range of different products but only few units of each product. This business model is based on the fact that people have become more individualistic in everything they do. The modern individual is not likely to follow trends and go with the tide – on the contrary. Instead she prefers to tell her own personal story through the things she buys, the movies she watches, the music she listens to and the places she visits. These interests are not commercially interesting in a demographic context but if we look transversely to demography (this makes sense when examining things taking place online) and concentrate on addressing the psychographic interests of the individual, then there is always an audience.

The old school way of segmenting people according to demography is therefore not usable when looking at the social media. It does not matter what country you come from, how old your are or what sex you are. What matter are the psychographic factors, also known as the IOA variables: Interests, Attitudes and Opinions.

Due to the way the internet has made its entry into the home and into the social media in particular the stories flare up and become the basis for activities when people visit a city. Through dialogue and hard work it is possible for tourist organisations to take part in the communication and contribute with the stories they wish to tell.

Web 2.0 as a concept

One of the most hyped concepts over the past few years is Web 2.0. This idea covers what might be the biggest revolution in the history of the internet.

Web 2.0 symbolizes how the internet has changed from being an isolated information silo to being a complete and workable system platform – comparable to Windows and Mac OSX. In other words: the internet users can now not only read but also write information on the internet.

What also characterizes the Web 2.0 websites is the social aspect. The websites get better as the number of users increases since they – unlike Web 1.0 websites – are build up around a so-called “participation architecture” where the user communicates with other users.

The Web 2.0 websites are typically build up on an open data structure (Open AP). This open data structure ensures that the data flow can easily and freely be drawn out from the websites and used in other contexts.

Flickr.com is a good example. Flickr has made a brilliant photo sharing service which makes it possible for people to share photos worldwide. A number of smaller companies are appearing around Flickr, profiting from the open data structure. One of the more popular ones is Moo. Moo gives the users of Flickr the possibility to make their own business cards with photos from Flickr.

For the tourist organisations the important thing is first of all to understand the mechanisms of the above. The social media contains an unbelievable amount of information, useful to the organisation if they know how to be a little creative. A simple search for a given city name on Flickr or YouTube will result in thousands of hits. This information can easily be applied to the website of the organisation. The big challenge is not to produce or find information but to filter out the valuable information.

The Web 2.0 websites can be divided into the following categories:

- Blogs
- Social bookmaking sites (del.icio.us, reddit.com)
- Social networks (facebook.com, myspace.com, linkedin.com)
- News aggregators/RSS Readers (reader.google.com, netvibes.com)
- Online storage (box.net, jungledisk.com)
- Photo sharing services (flickr.com, picasa.google.com)
- Video sharing service (youtube.com, vimeo.com)
- Peer to peer news (netscape.com, digg.com)
- Office suits (docs.google.com, zoho.com).

Target segments for social media

It is a little difficult to speak of target groups in relation to the social media. It is almost the same as having to define a target group for the worlds entire magazine business or range of television channels. There is something for every taste and the same applies for the social media.

Never the less many organisations are deterred from using the social media as a marketing channel because of the vague target group definition.

- "The typical user is 12 years old"
- "It is a city thing"
- "It is too technical for the common internet user"
- "I do not know anybody who contributes to the contents of the social media themselves"
- "It is a dead duck!"

... are some of the typical conclusions heard in companies and organisations when a social media strategy is being developed.

The truth is, however, that everybody who uses the internet also uses the social media – consciously or unconsciously. Google does not differentiate between social platforms and statistic information silos for instance. This means that social platforms like Facebook and Flickr and information silos like stockholmtown.com all get top positions when you use Google to search for something like "cruise stockholm".

The internet users contribution to the social media follows the so-called 90-9-1 rule:

- 90% of the users are so-called "lurkers" (use the media but do not contribute to the contents)
- 9% of the users contribute to the contents from time to time but completely different priorities take up most of their time.
- 1% of the users are very involved and responsible for most of the contributions. It can look as if they do not have a life because they typically post their story in the social media only a few minutes after it has actually happened.

UseIt.com (Jacob Nielsen)

Example - The Ramones
As a celebration of the 40 year anniversary of the New Yorker punk group, The Ramones, an event is arranged in every large European city. The event is a multi-cultural happening with documentary showings, lectures and concerts with punk bands, inspired by The Ramones. In the social marketing of this event it will be obvious to take a closer look at some of the psychographical factors related to The Ramones' audience. To the best of our belief the effect form making a media strategy on the basis of demographic factors like age, sex, social status and address will not be great since The Ramones has millions of fans of all ages worldwide, happy to travel a long way to experience a good Ramones event.
In this case the social media is an excellent way to speak across demographic factors and straight to the life blood of the fans: The Ramones. It is – in other words – important to locate the social networks (for instance via tecnorati.com or bloglines.com) which help the event organizers spread the word, without having to consider demography.
The event organizers' task is to produce and place the stories in the right social media and most importantly; establish and maintain the dialogue in the social media.

Pitfalls within the social media

In other words, only 1 out of 100 contributes to the social media. Therefore the conclusions stated earlier are nonsense.

A lot of times the demographic factors related to the target group put a stop to the development of the company's social media strategy. Instead the strategy should stem from the psychographical interests.

Use your blog as a blog!

A classic pitfall is when the manager for instance uses his blog to tell about experiences from the management hall. The fact that the user of a blog have no idea how to use it is a big problem. The users experience the blog as a traditional home page with statistic information instead of using it as a platform for social dialogue with their interested parties.

Say no to spam!

Another typical mistake is made when the company or organisation wish to obtain dialogue with a group of bloggers. In many cases the company has researched the market and found the exact 20 blogs they need to get hold of and collected the bloggers' email addresses – but then it all falls apart: instead of writing a personal email the company sends out a standard email.

A successful blogger is typically someone who is very passionate about the things she writes on her blog. She is to a high extend driven by emotions compared to a corporate communicator. If a commercial organisation wishes to use her as a marketing channel three things are required:

1. Send a personal email which states who you are and the reason why you have chosen to contact her.
2. Ensure complete transparency in the campaign/stunt in which the organisation wishes to use her blog/social platform.

The importance of value in the conversation

3. Offer a gift. This can be anything from good references on the organisations' blog/magazine to a plane ticket to the city represented by the organisation.

The contents should always set the scene for debate and communication! Remember to always think about the context of the story. A 10 minute film presenting the company values will seldom work on YouTube, just like an A4 press release will not be suitable on a blog.

Communicate in English!

A classic mistake is also made when the organisation communicates in its native language. This is not suitable since the communication in the social media is all about creating debate and identification across demographic groups.

Value in the conversation

Travel stories have always been an important part of social relations and the way we share experiences with others. These stories are now available on the internet, making it possible for everyone to keep up with and contribute to the sharing of experiences. Some conversations tend, however, to spread more than others. In order for conversations to be spread they have to be delivered with honesty and enthusiasm to the community, since it is the users of the particular community who bring the stories to life, re-mixes them and spread the conversation in a wider context.

Enthusiasm can not be created artificially. Conversations which leaves an impression are always based on personality and honesty. Just because a company or organisation feels passionate about a product or an event is does not necessarily mean that the customer will do the same. That is probably the reason why press releases are not send to ordinary people – they are based on an internal process which does not make sense to the man on the street.

Creating value

For a message to make sense in a conversation it has to be delivered with personal commitment. In the following we present three suggestions to which elements this kind of conversation should contain in order to make sense in social communities.

Create real value

A service or a content which gives the user a real value and make her life easier create an emotional bond between sender and user is to a high extend more important than the marketing material. The closer the user is to the sender emotionally, the stronger the effect of the message will be.

Create value together

If the team behind the service/content does not take part in the creation of the emotional value they will not have the same abilities to create a bond between themselves and the user. Everyone who takes part in the project has to have something at stake in the creative process – otherwise the message will leave an impression of mechanical work.

Create a party around the value

During the creation of a service or product it will be profitable to celebrate milestones together with the community which is going to help make the conversation come alive in the long-term. This can mean that you already early in the process and with great advantage can involve the most important people who will be communicating the story on a long-term basis.

The new media loop

If tourist organisations wish to use the social media to market their product it requires an understanding of the in some ways different looking media loop.

In conventional marketing based on monologue there is always a clearly defined sender who wishes to tell the consumer a story. The sender uses some kind of content supplier – often an advertising agency – to make the story interesting for the recipient. Hereafter the final decision about a media is made in order to make the campaign reach the consumer in the best possible and most direct way.

The direct marketing model based on monologue is especially good when dealing with grand campaigns, made to affect a lot of people (in a particular demographic target group) with a simple message.

If, on the other hand, the tourist organisations are interested in creating publicity in a given psychographic target group – like for instance a group with a particular interest in "molecular gastronomy" – they can profit from using a different model which considers marketing based on conversation. In this kind of marketing different rules apply when it comes to obtaining effect in the target group. Instead of running the story according to the direct marketing model mentioned above the stories should be placed in the different relevant social media and hereby create dialogue.

A typical way for an organisation to place a story would be to make a creative list of the top 25 molecular kitchens in the city in connection with a food festival and present the list on the organisations blog. This story will then have to be nursed by the organisation. The organisation has to "advertise" by making the big molecular gastronomy blogs aware of the story and it has to work out other creative initiatives which can create a buzz around the story. The only limit is the imagination but at the end of the day the most important thing is to ensure that the story is linked in the different social media in order to create as much dialogue as possible in as many of the media as possible. A simple monitoring on technorati.com and bloglines.com can prove the success – or lack of such.

The opinion former

If a tourist organisation is going to be good at using the social media as a marketing channel it is important to let go of all control and instead incite and support people in telling the story of the city in their own way. The social media can not be controlled since it is the most pure form of anarchy in the world today. If the tourist organisations wish to join in it will have to be on anarchistic terms.

The opinion former

Involvement of relevant ambassadors is crucial in the communication of a message on the social platforms but how do you make sure that you get the right ambassadors and how do you differentiate between those who have influence on the relevant community and those who do not?

How do you figure out who are the opinion formers within the social media? There is no simple answer to these questions – you can not measure from a "share of voice" approach like you can with the television media.

Not even by looking at the number of hits on the page can you find an answer since a lot of people do not visit the page but subscribe to the contents via a RSS reader. There are some actual parameters though through which you can measure the authority of a social medium.

There are especially three concepts which are important to take into consideration when you are going to choose and establish contact with the opinion formers who will be the executors of the social media strategy:

- How many different people comment on and deliver material to the website?
- How often does the given social medium appear on other websites' blogroll (link collection)?
- How popular is the given network on technorati.com, bloglines.com, del.icio.us and reddit.com?

Measuring and monitoring the social media

All tourist organisations – interested in making the social media an important variable in their communication strategy – have to measure the results obtained on the new social platforms. The importance of knowing whether the resources you use on up-dating Google Maps or having a profil on Facebook produce a yield is just as great as the importance of measuring print campaigns or classic Web 1.0 solutions (most organisations have a set matrix to measure from by now).

To a high extent it is all about defining the target groups which make most sense in relation to a particular organisation or project. Is attention enough? Is the number of downloads the right parameter? What number of visitors or in-coming links is relevant? In the following you find some of the parameters worth considering.

Number of links from blogs

Social services on the internet have to a high extent put focus on the importance of in-coming links. Through sites like technorati.com and Google Blogsearch it is relatively easy to get a general view of the blogs linking to your service. At the same time it is possible to get an idea of the authority that each blog has.

Number of products sold

If it is possible to buy a product or a service on the site this is an obvious opportunity to measure customer satisfaction or the relevance of the contents exposed. If the primary goal is to sell tickets to an event for instance, this would be an obvious parameter for success.

General increase in customer satisfaction / feedback

It is important to consider how you evaluate the customer satisfaction in the best way. On the social platforms it is more or less expected that the user has the chance to give feedback and form a dialogue with other users of the site.

Coverage from established media

More and more journalists use blogs and other social services in their research – especially when it comes to the contents generated by niche groups. A lot of stories take form in smaller communities and grow bigger in the mainstream media. It should be considered how journalists can become aware of your media initiatives and thereby have a greater chance of being able to spread the stories to a bigger audience.

Increase in subscriptions/visitors on the site

If you experience an increase in visitors on the sites this is of course an important parameter but it can be just as important to make people subscribe to the contents of the site by using RSS. Even though a subscription does not guarantee a reader it increases the chances of forming a long-term dialogue with the person – this is compared to a one-time user where chances of another visit are small

It is therefore recommended to offer a wide selection of RSS which gives the user the opportunity to maintain contact without having to commit to a news letter for instance.

In general we recommend that tourist organisations take active part in the social media. As a minimum the tourist organisations should have a blog which can be used as a platform for social dialogue. One of the main reasons why the bigger organisations choose to do without the social media as a media channel is the fact that they do not feel they can measure whether it is a success or not. There are no grand analysis and monitoring tools to help present a total picture of success in the social media. There are, however, a number of different applications which altogether give a good idea of the success – or the opposite.

Google Analytics
Google Analytics is the worlds best tool for web analysis compared to the traditional way of measuring traffic to and from the organisation website. Here you get all the traditional statistics like page views, visitors, repeat visitors and referrals from search machines, direct reporters and bookmarks/emails. Google Analytics is free of charge for all sites with less than two million hits per month.

Technorati.com and bloglines.com
Technorati.com and bloglines.com are so-called "blog-surveilance-tools" which can give a clear picture of the amount of dialogue started by the organisation. There are two websites monitoring everything going on in the social media. Every time someone is linked to or in some other way in connection with the contents of the organisation website this information is recorded by the two websites.

As a user you can then draw out all the information you need – for instance the number of people who have linked to something specific within the past week or if any important websites have had focus on the contents of the organisation website.

Besides from using this information to measure the momentarily success the information can also be used for future planning. It is therefore recommended to draw up an Excel document or the like and list the most important blogs which have shown or referred to the material from the organisation. It can be advantageous to be able to refer to contents presented earlier by the social media when contacting the media later on.

10 dogma rules for a social media strategy

1. Know your audience
The importance of knowing your audience can not be underestimated. By knowing the psychographic profile of your audience you can tailor the social media strategy to fit the target group – both in terms of contents production, placement, executing and the continuous dialogue with the users.

2. Get new friends
Throw away the inhibitions and build up personal relations with important people in the network you wish to affect. Typically it does not require more than a couple of well-chosen comments on the persons blog or a personal email. Without personal dialogue the marketing in the social media is useless since the non-professional bloggers mostly write straight from the heart. By getting influential friends in the social media sphere you also get a unique opportunity to see how the mechanisms work on the other side of the table.

3. Contribute with unique value
Do not ever copy others success – no matter how tempting it can be. In the social media you should never underestimate the value of being the first to introduce a new video, story, photo or song – or perhaps a different way of differentiating an already existing story. It is all about contributing with a unique value that somehow differentiates from the existing stories and thereby creates a form of originality.

4. Do not sell out yourself
In the social media it is often pretty obvious who has something to offer. It is traditional to communicate very personally and openly in the social media and it shows if you are not being yourself. For once it pays off to be open and honest all the way – exploit it!

5. Be transparent

When companies and organisations start to communicate in the social media it is very important that the intention is completely transparent. Very few social media will bring stories with an unclear intention or sender. Do not blur the sender or the intention if you want the contents to spread in the social media.

6. Be patient

Always be patient when you let your stories loose in the social media. Sometimes it can take longer than expected before something actually happens.
It can be frustrating that no one wants to spread the material you have spent weeks producing. You can, however, take it easy – if the material is good and fits the psychographic profile of the users it usually does not require more than one or two big social platforms to present the contents. Hereafter it will spread like a fire through the social media.

7. Think form and content

It can be tempting to just put the organisation's 10 minute product video on YouTube and hope that someone will find the organisation website that way. The truth is though that a 10 minute product video typically is produced to run on a 42" wide screen on a fair, in a foyer or the like.
If you come up with a great idea for a video, then think again. Is it worth the trouble presenting it in the social media? Will it have the expected effect?
If you on the other hand already have decided to make a video for YouTube and wish to create a dialogue with the target group by using this feature, you should always think about how the story should be told and what form it should be presented in – in order to spread and create the dialogue you are aiming for.

8. No spam
Personality, personality, personality. Do not ever send any mass-messages to the people you wish to create a dialogue with. Best case – it will not have any effect at all. If the worst comes to the worst you will burn the bridges to an important ambassador for your marketing campaign.

9. Let go
You can not control who brings what or who remixes your material. Lean back and enjoy the ride. It will be an adventure!

10. Monitor
Always monitor the dialogue you create in the social media. Like this you can see what people like and do not like and it gives an excellent opportunity to learn from your mistakes. Furthermore the monitoring presents a great opportunity to become friends with people who are fans of you and the contents on your website. You can use these relations in later campaigns when you need ambassadors to spread your stories.

Flickr.com

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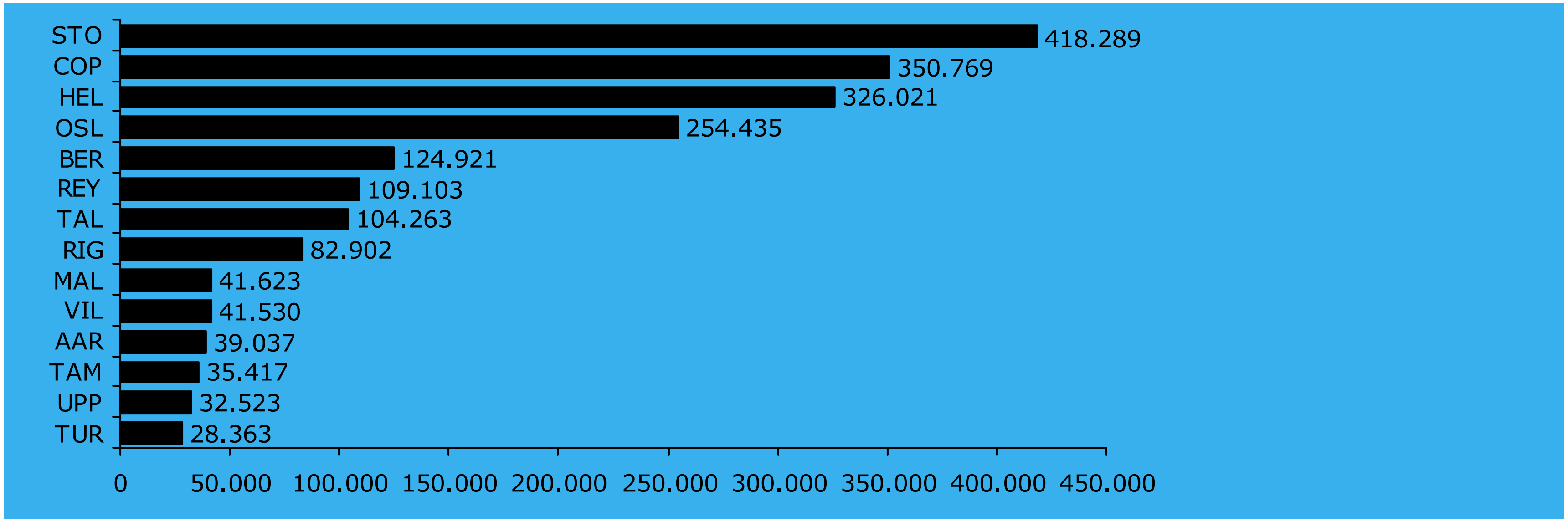


City images on flickr.com

All tourists, with few exceptions, carry with them a camera and/or another device suitable for photographing (mobile phones, video cameras etc.). This is not new. The news is that some of these tourists decide to create a profile on websites like flickr.com and upload their holiday photos to show their pictures and what they would recommend to do or perhaps not to do while on holiday. Every potential tourist can as such go online and have a look at what each city has to offer, according to tourists and locals who have illustrated the cities. Photos of these experiences can be understood in terms of prolonging the holiday/experience and thereby creating valuable memories.

As a result hereof, the next section will focus on the Internet website www.flickr.com, which is a web community where people can upload all sorts of photos, not only holiday photos.

All the 14 cities are well represented on flickr.com. The graph above show what a search on the city name results in. Stockholm comes out on first place, with app. 418.000 photos followed by Copenhagen, Helsinki and Oslo.

This means that no matter how many postcard-style photographs the tourism organisations use to promote the cities, there will be increasingly and considerably more pictures taken by ordinary tourists and locals. These images contribute to the overall image for the city.

Segment	Search word	STO	COP	HEL	OSL	REY	TAL	BER	RIG	MAL	AAR	VIL	TUR	UPP	TAM
Party	Shopping	2.257	2.446	1.914	1.179	632	439	478	167	158	110	229	62	72	122
	Party	7.050	4.675	6.073	5.416	908	1.669	1.079	1.910	2.225	1.101	500	404	939	441
	Café	1.840	1.705	1.428	1.399	568	393	283	276	195	124	117	137	66	166
Modern	Modern	878	1.294	851	237	193	209	229	91	48	76	66	44	39	19
	Innovative	8	53	18	3	0	0	0	1	0	0	10	0	0	3
	Contemporary	58	200	628	149	25	55	182	15	6	7	72	14	2	13
Relaxing	Relax	379	313	145	97	50	50	60	16	19	19	15	14	22	15
	Family	1.637	1.510	625	928	656	202	467	485	114	341	154	228	91	75
	Friends	3.690	2.626	2.966	3.530	861	453	577	402	926	942	178	169	274	256
Historical	Typical	236	190	142	70	98	79	92	42	27	13	25	12	21	13
	Historical	315	88	137	98	29	73	87	40	7	4	49	25	19	3
	Museum	6.441	5.311	3.534	5.287	1.798	1.497	914	671	181	499	345	640	99	258
TOTAL		**24.789**	**20.411**	**18.461**	**18.393**	**5.818**	**5.119**	**4.448**	**4.116**	**3.906**	**3.236**	**1.760**	**1.749**	**1.644**	**1.384**

Uploading memories to flickr.com

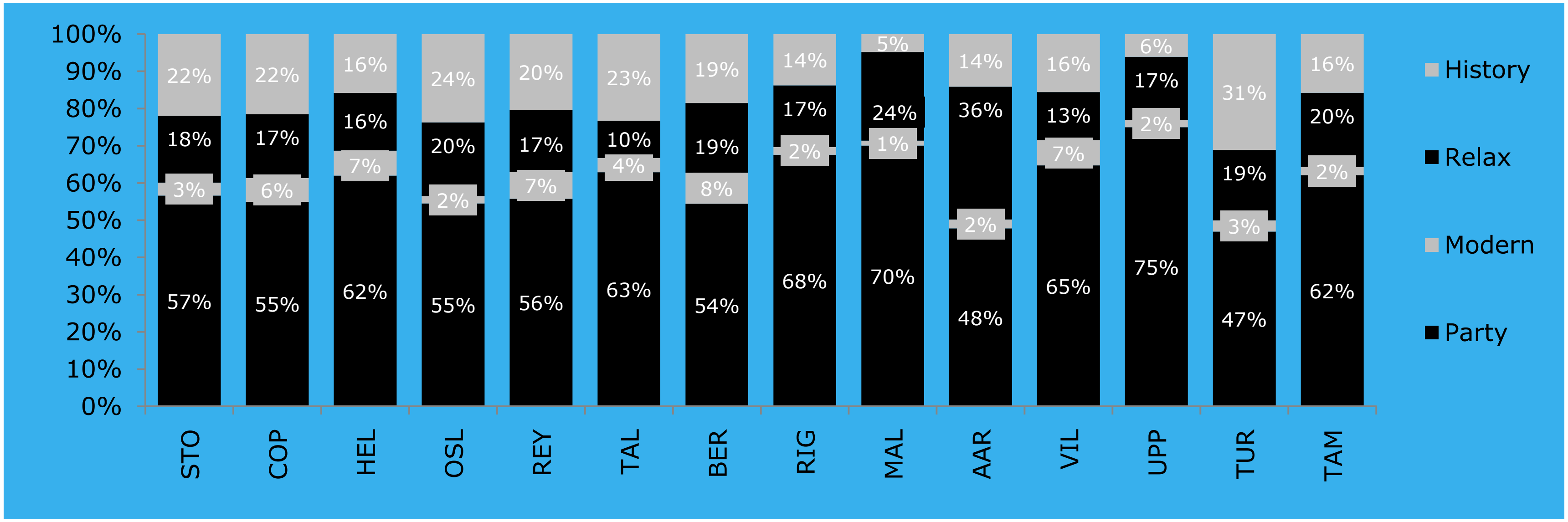
The photos have been analysed in terms of how they correspond to the four psychographic segments (party, modern, relax and history).

This method was chosen since it also gives an idea of how each city 's image is presented on flickr.com. For each of the four segments, three keywords that describe the segments have been used to filter all the photos.

However, it is important to bear in mind, that this is only photos uploaded, not taken, which of course sum up to an indefinite number of photos for all segments, considered the fact that nearly all tourists carry with them a camera.

The table above clearly show that Flickr.com displays most photos within the party segment, as search words within this cluster had considerably more hits than the other segments. That being said, the keywords linked to the photos are written by the person who did the uploading. This means that there is an almost endless possibility of searching for topics as well as many photos are perhaps not represented with the search word you choose to use. For example, not all photos displaying relax or modern experiences might appear, as they contain other keywords.

In general, Flickr.com is a great way for tourism organisations to see how the tourists (and locals) image and experience their city. The website is a great way for inspiration to go on holiday to a certain city, as tourists both can see photos uploaded by typical tourist attractions, often uploaded by other tourists, as well as see photos uploaded by local people, which often portray off-the-beaten-path experiences.



Showing of your favourite experience

In all of the cities the party experience segment contains the largest amount of uploaded photos, most we find in Malmo with 70% out of the four psychographic segments belonging to the party group, i.e. photos found with the keywords party, café and shopping.

In terms of the modern segment, most pictures are found in connection with Bergen, where 8% are within this segment. Keywords here are besides modern, innovative and contemporary.

People who have uploaded most photos about relaxing, have taken the snapshots in Aarhus, as the graph shows a percentage of 36% in the relax segment. These photos show the keywords relax, family and friends.

Finally, in terms of photos belonging to the history segment, most photos were found in Turku, with a percentage of 31. People who uploaded these photos attached the words typical, historical and museum to their experience in the city.

TripAdvisor.com

VirtualTourist.com

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Online tourist forum (tripadvisor)

The www.TripAdvisor.com (TA) forum is a way for people to reassure their travel plans, meaning that although more and more people prefer to travel on their own (as opposed to organised tours) they still need the comfort of knowing that their plans are realistic.

An interesting discovery when analysing the forum is the fact that the people who give answers to the many questions tend to be people from that specific city, i.e. local people. The forum is still an online community with travellers-to-travellers recommendations, however the travellers-to-locals seem to dominate the forum. These local people spend a lot of time answering questions, even surfing online or making phone-calls to e.g. hotels, to help arriving tourists. They therefore should be looked upon as an extended arm of the local tourist agency, albeit they are volunteers and have no visible connection with the agency and are thus out of reach concerning what they recommend.

On the other hand, these *local experts* (expression used by TA) seem to be what many tourists ask for, as many of them want to experience a different and off-the-beaten-path city vacation. This conclusion also correspond with the fact that a lot of the questions tourists ask on these forum can easily be found on the official tourist website, i.e. how to get from the airport to the city centre, recommended restaurants, activities/sights not to miss etc.

Simultaneously, we cannot know for sure how many people visit the official website *as well* as the online forums.

Transportation in & to/from			Hotels/Accommodation			Daytrips in & outside of			Eating out/Clubbing		
#	CITY	SCORE	#	CITY	SCORE	#	CITY	SCORE	#	CITY	SCORE
1	MAL	37,7%	1	AAR	23,1%	1	HEL	9,8%	1	AAR	30,8%
2	BER	32,9%	2	COP	22,3%	2	AAR	7,7%	2	TUR	25,0%
3	OSL	28,8%	3	VIL	19,4%	3	MAL	7,5%	3	RIG	17,5%
4	UPP	27,3%	4	UPP	18,2%	4	BER	7,5%	4	STO	13,4%
5	COP	23,9%	5	STO	17,2%	5	COP	6,4%	5	TAL	13,3%
6	HEL	23,7%	6	TAM	17,0%	6	REY	6,1%	6	MAL	13,2%
7	VIL	23,5%	7	REY	16,8%	7	TAL	4,8%	7	COP	12,8%
8	AAR	23,1%	8	OSL	16,3%	8	OSL	4,2%	8	REY	10,3%
9	TAL	19,5%	9	HEL	14,9%	9	TAM	3,8%	9	VIL	9,7%
10	STO	16,5%	10	TAL	13,8%	10	STO	3,5%	10	UPP	9,1%
11	TAM	15,1%	11	RIG	13,4%	11	RIG	2,1%	11	OSL	8,0%
12	REY	14,5%	12	MAL	13,2%	12	VIL	1,4%	12	HEL	7,2%
13	RIG	10,3%	13	BER	11,7%	13	UPP	0,0%	13	BER	5,4%
14	TUR	0,0%	14	TUR	0,0%	14	TUR	0,0%	14	TAM	3,8%

Travel forum topics (tripadvisor)

Results from the online search on the TA travel forum indicate that tourists are mostly interested in knowing about general travel questions before going to any of the 14 cities. General questions include things to do/see, what kind of weather to expect, why should they go to this city, price-level and safety concerns. In the forum there are a lot of similar questions, why this is the case could be two reasons. Firstly, people do not want to spend more time than necessary to look through the many pages of questions and/or secondly, people want the latest up-date, which is possible in this kind of web-community.

The forum is very interesting, because the majority of the questions posed here are questions that are also accessible through the official tourism websites. The reason for this could very much go together with the tendency that the tourists want to get in touch with the local people and other tourists who have experienced the city with the purpose of obtaining the more off-the-beaten-path experience.

Areas of great interest in the TA forum are transportation in & to/from the cities, hotels/accommodation, eating out/clubbing and daytrips in & outside of the city. The four topics above are ranked according to how large a percentage the topics represent in each city out of the total number of reviews on the forum (other topics being, besides the ones mentioned are shopping, discount card, post-trip comments and New Year’s Eve/Christmas).

For example, concerning eating out/clubbing, questions within this category rank highest in the Aarhus and Turku forum, with a percentage of 30,8% and 25,0%, respectively. Opposite we see this category is not frequently asked in the Bergen and Tampere forums, the Bergen forum is more concerned with questions relating to Transportation in & to/from and Hotels/Accommodation.

Total numbers of

	Reviews	Photos
COP	3.906	3.094
AAR	308	249
STO	4.667	3.571
UPP	425	341
MAL	537	427
HEL	4.261	3.155
TUR	586	473
TAM	596	388
OSL	3.253	2.461
BER	1.290	1.060
REY	447	366
TAL	1.450	1.195
RIG	1.376	1.168
VIL	1.661	1.386
ALL	24.763	19.334

Online search 22.2.08

Virtualtourist reviews and photos

The previous section dealt with travel questions prior to going on holiday. This section will now go to the website www.virtualtourist.com where people, among many things, can upload their travel photos and give reviews on various topics in almost all cities in the world. The website is very easy to navigate in as the people behind the site divide the reviews and photos into certain categories, for example hotels, things to do, nightlife and off the beaten path. The latter two will be discussed subsequently.

It is then up to the users to put their comments into the relevant category. This part of the website is thus used as inspiration for where to go and is therefore similar to the Tripadvisor.com forum. Only major difference is that here it is not possible to post any questions. You can only browse through categories of reviews and photos.

The table above shows the amount of travel reviews and photos you will find if you do a random search on the city name.

By making the qualitative data into more quantitative data it has been possible to evaluate just how well the 14 cities are represented in this online community. It is worth mentioning that the reviews and photos are not divided into negative and positive comments, although some of the categories clearly show in which camp they stand, e.g. “warnings or dangers” and “tourist traps”. There are some graphs above illustrating the 14 cities representation in VT. We recommend to go in and look at what is being said about your city, as the comments given appear highly honest.

Things to do

#	CITY	SCORE
1	RIG	45,4%
2	UPP	43,5%
3	COP	43,3%
4	TAL	40,1%
5	VIL	39,9%
6	BER	39,4%
7	STO	38,1%
8	REY	38,0%
9	AAR	37,7%
10	OSL	36,9%
11	MAL	34,6%
12	TUR	34,5%
13	TAM	32,4%
14	HEL	30,5%

Off the Beaten Path

#	CITY	SCORE
1	UPP	12,9%
2	VIL	8,6%
3	BER	8,1%
4	HEL	6,7%
5	AAR	6,5%
6	TUR	6,1%
7	OSL	5,8%
8	COP	5,7%
9	TAM	5,5%
10	STO	5,5%
11	MAL	4,8%
12	REY	4,0%
13	TAL	3,7%
14	RIG	2,4%

Local Customs

#	CITY	SCORE
1	VIL	8,4%
2	REY	6,7%
3	TUR	5,6%
4	AAR	5,5%
5	OSL	4,9%
6	MAL	4,8%
7	HEL	4,7%
8	STO	4,5%
9	RIG	4,3%
10	UPP	4,2%
11	COP	3,8%
12	TAM	3,4%
13	BER	2,9%
14	TAL	1,9%

Restaurants

#	CITY	SCORE
1	TAM	17,6%
2	TAL	15,8%
3	HEL	14,7%
4	REY	14,3%
5	RIG	13,4%
6	TUR	12,1%
7	OSL	10,7%
8	COP	9,2%
9	VIL	9,2%
10	MAL	9,1%
11	STO	9,1%
12	BER	8,1%
13	UPP	6,8%
14	AAR	6,2%

Virtualtourist reviews

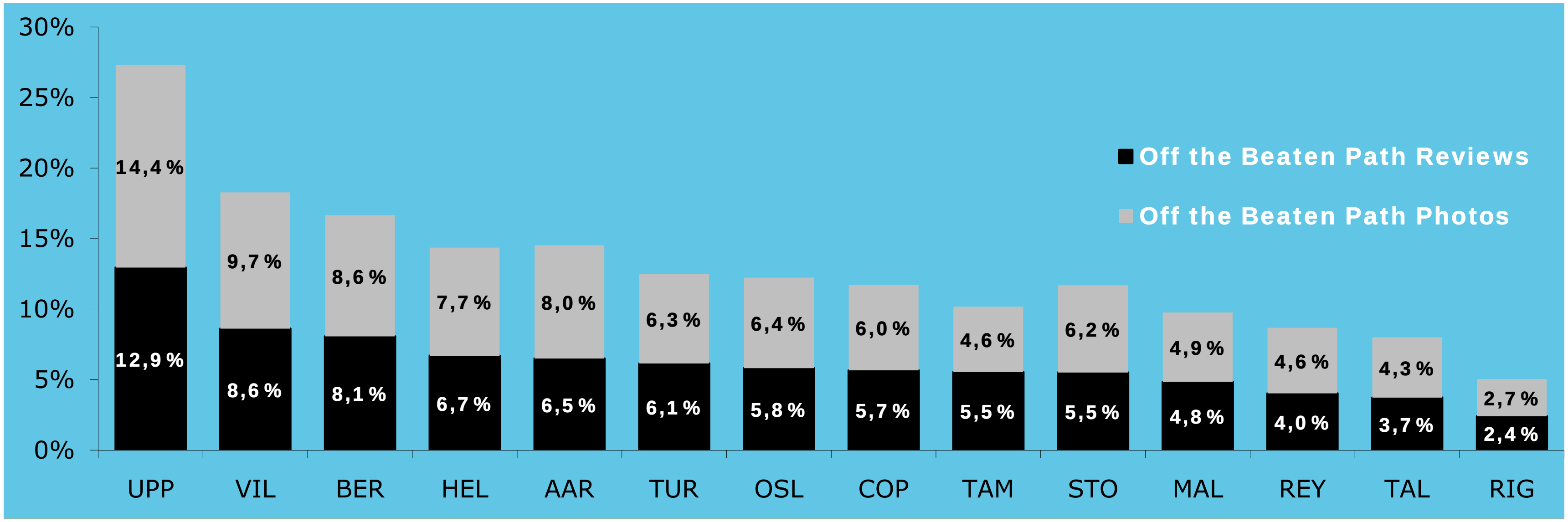
The website www.virtualtourist.com (VT) is, amongst many things, organized into certain reviews and photos, each attached to certain categories. People can then have their say by writing comments and/or uploading photos representing the specific category. Going through the reviews and comparing them between cities is very easy due to the default set-up. This was not the case with Tripadvisor, where the travel forum was not divided into categories beforehand.

In VT we found a total number of reviews for the 14 cities of 24,763, which then were divided on 13 topics Photos to each review have the same category names. Photos uploaded in this section were 19,334. Here only the reviews will be analysed.

Topics in the Virtualtourist review section are, besides the ones listed above, packing lists, shopping, sports travel, general tips, transportation, warnings or dangers, tourist traps, hotels and nightlife. The four topics above are ranked in the same way as was the case with the Tripadvisor forum, that is how large a percentage the topics represent in each city out of the total number of reviews on the city.

For example, of all the 14 cities, the city of Uppsala has most reviews focusing on off the Beaten Path, whereas Tampere reviews are mostly about restaurant visits.

Like the topics travel forum in Tripadvisor, it is worth having in mind that the majority of reviews are neither necessarily positive nor negative. As such, each tourism organisation will have to go to the websites if interested in going more into details about the specific contents.



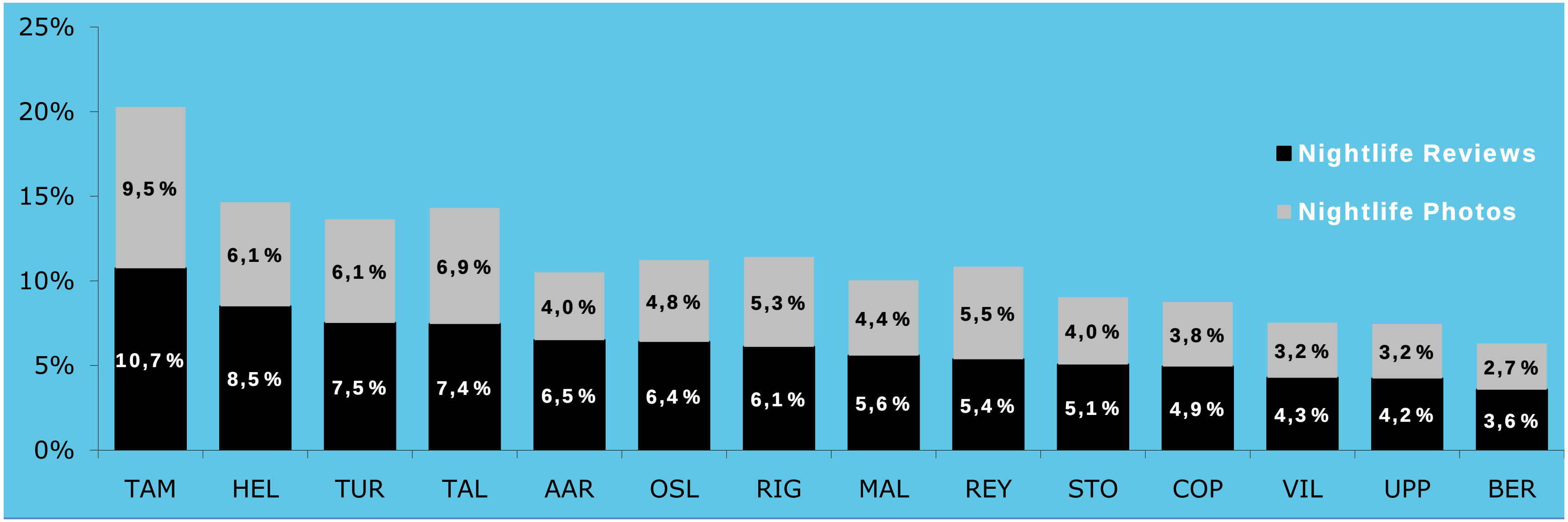
Off the beaten path

Above there is an example of one specific topic in reviews and photos on Virtualtourist, that is Off the Beaten Path. Within this topic people write their comments about certain experiences in the city they visited, they have perceived as unusual and not the typical tourist thing to do.

The majority of the reviews in this category concern tips on nature experiences outside and inside the city, for example going on a daytrip to a beach close by or relax in a city park. Other recommend certain neighbourhoods or special walks to experience a different side of the city.

Uppsala, Vilnius and Bergen are in top both concerning reviews and photos, while Tallinn and Riga are bottom-two in both groups. The cities in between do not follow each other in terms of amount of reviews and photos, for example, Helsinki which is ranked third in amount of reviews, is on a fourth place when it comes to photos. Aarhus, on the other hand, is placed fourth with reviews, yet ranked third in amount of photos.

That being said, the differences are not major and the amount of reviews seem to overall follow very well with the amount of photos uploaded. This could be either because the same person upload a photo together with a review or choose to do either of the two options, uploading photo or writing a review.



Nightlife

Above there is an example of another specific topic in reviews and photos on Virtualtourist, that is Nightlife. Within this topic people write their comments about the good times they had in city going out to certain clubs and cafés.

The majority of the reviews in this category concern tips on certain clubs and their price-level, opening hours and clientele. Other categories within this topic are gay and lesbian clubs to visit and going out in specific local neighbourhoods.

In top of the nightlife reviews we find the three Finnish cities of Tampere, Helsinki and Turku, whereas the cities with the least amount of reviews are not centred on one country, as we here find Vilnius, Uppsala and Bergen. The amount of reviews correspond in average very well with the amount of photos uploaded. Yet in comparison with the other topic, Off the beaten path, there seems to be more inconsistency within this category.

The photos people have uploaded most often show either a photo of people having fun at the club in question, or a picture of the club taken outside from the street.

Most popular attractions

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Attractions – cities vs. tourists

The cities' top 3 attractions

The tourist agencies in the 14 cities were all asked to give a list with a rank of their top sights and attractions. All cities mentioned many different activities, however, here is only a focus on their top three (labelled "TA ranking"). Almost all cities have focused on the top cultural attractions in terms of e.g. number of visitors.

The investigated tourists' top 3 attractions

This "official" top three is compared to the results from the questionnaire from where we have the share of tourists that have visited all sights (labelled Q ranking).

Virtualtourists' top 3 attractions

Finally, the two rankings above are also compared with the top three "things to do" in the 14 cities as found on www.virtualtourist.com. These top-three "Things to do" from are based on reviews and are hence made by tourists and/or local people who have experienced the activities in question. (labelled VT ranking).

Differences

In sum, the tables in the following pages will show these rankings from the three different points of view: tourism organisation, the tourists of the survey and online tourists.

From the tables we see some discrepancies between on the one hand what the 14 tourist agencies argue are their top three activities and on the other hand which activities are the most reviewed online at www.virtualtourist.com and in the questionnaire.

The tables are a way for the tourist organisations to evaluate if their design and communication about certain experiences are received in the likeable way by the tourists, i.e. whether the experiences they grant high also are given high value (in the form of visits, photos and reviews) by the tourists.

#	Stockholm Tourist Agency	Q ranking	VT ranking
1	Vasamuseet (The Vasa Museum)	3	2
2	Skansen (Open-Air Museum)	4	5
3	Gamla Stan (The Old Town)	1	1
#	**Questionaire**	**TA ranking**	**VT ranking**
1	Gamla Stan (The Old Town)	3	1
2	Kungliga Slottet (The Royal Palace)	4	3
3	Vasamuseet (The Vasa Museum)	1	2
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Gamla Stan (The Old Town)	1	3
2	Vasa Museum	3	1
3	Kungliga Slottet (Royal Palace)	2	4

#	Malmö Tourist Information	Q ranking	VT ranking
1	Malmöhus Castle (Malmö Museums)	5	3
2	Lilla Torg	3	7
3	Shopping area downtown (gågatan)	2	N/A
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	Stortorget	8	1
2	Shopping area downtown	3	N/A
3	Lilla Torg	2	2
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	City Hall & Stortorget	1	8
2	Parks & canals	8,9,N/A	4,12
3	Malmöhus & Museums	5	1

Attractions in Swedish cities

Stockholm, Malmo and Uppsala

Of the three Swedish cities, Stockholm seems to be closest to the tourists’ behaviour with all attractions mentioned in the ranking, questionnaire and Virtualtourist.

Uppsala has the same top three on their ranking as on www.virtualtourist.com, but the results from the questionnaires are somewhat different.

Malmo has the largest difference of the three Swedish cities. The emphasis of the online tourists are on parks and canals as well as Stortorget while Malmo focuses more on Lillatorg and the shopping street.

#	Uppsala Tourism	Q ranking	VT ranking
1	Uppsala Cathedral	1	1
2	Old Uppsala	3	2
3	Uppsala Castle	7	3
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	Uppsala Cathedral	1	1
2	The Linnaeus Garden	4	5
3	Old Uppsala	2	2
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Uppsala Cathedral	1	1
2	Old Uppsala	3	2
3	Uppsala Castle	7	3

#	Helsinki Tourist Information	Q ranking	VT ranking
1	Linnanmäki amusement park	12	8
2	Korkeasaari-Helsinki Zoo	11	9
3	Grand Casino Helsinki	17	N/A
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	Helsinki Cathedral	13	1
2	Senate Square	15	N/A
3	Market Square	16	4
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Tuomiokirkko (The Lutheran Cathedral)	1	13
2	Suomenlinna Island & Fortress	5	10
3	Uspenski Orthodox Church	4	12

#	Tampere Tourist Information	Q ranking	VT ranking
1	Särkänniemi Adventure Park	5	3
2	Tampere Hall	4	N/A
3	Tallipiha Stable Yards	8	N/A
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	Industrial Heritage	5	**??**
2	Pyynikki recreation area	7	1
3	Näsinneula Observation Tower	6	2
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Pyynikki park & tower	2	7
2	Näsinneula (Observation Tower)	3	6
3	Särkänniemi Adventure Park	5	1

Attractions in Finnish cities

Helsinki, Tampere and Turku

Helsinki seems to be very far away from the wants and needs of the online tourists. The top three ranking at www.virtualtourist.com are placed as number 10, 12 and 13 in the city’s ranking.

Tampere succeeds best of the three Finnish cities, although

Tampere Hall and Tallipiha Stables do not make it to the www.virtualtourist.com list.

Turku rightly focuses on Turku Castle and River Aura but misses Turku Cathedral in the top three.

#	Turku Tourist Information	Q ranking	VT ranking
1	River Aura	1	3
2	Turku Castle	2	1
3	Luostarinmäki Handicrafts museum	9	4
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	River Aura	1	3
2	Turku Castle	2	1
3	Turku Cathedral	10	2
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Turku Castle	2	2
2	Turku Cathedral	3	10
3	River Aura	1	1

#	Tallinn Tourist Information	Q ranking	VT ranking
1	Town Hall Square Town Wall	1	8,7
2	Towers and Gates	2	1
3	St. Olav's Church	5	4
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	Town Hall Square Town Wall	1	8,7
2	Towers and Gates	2	1
3	St. Nicholas's Church	6	10
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Towers & Gates	2	2
2	Old Town	N/A	N/A
3	Alexander Nevsky Cathedral	N/A	N/A

#	Riga Tourist Information	Q ranking	VT ranking
1	The Dome Cathedral	2	4
2	St. Peter's Lutheran Church	4	1
3	St. John's Lutheran Church	7	12
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	House	5	3
2	The Dome Cathedral	1	4
3	The Freedom Monument	11	2
#	**VirtualTourist.com**	**Q ranking**	**Ta ranking**
1	St. Peter's Lutheran Church	4	2
2	The Freedom Monument	3	11
3	The Melngalvju (Blackheads) House	1	5

Attractions in Baltic cities

Tallinn, Riga and Vilnius

The three Baltic Capitals seem to know the tourists pretty well, although Tallinn does not mention the Old Town and Alexander Nevsky Cathedral as top attractions.

Riga performs better, with three churches as top three attractions, although St. John's is only number 12 on www.virtualtourist.com.

Vilnius has two out of three top attractions right, while Bastion of City Wall is not a top attraction among the online tourists.

#	Vilnius Tourist Information	Q ranking	VT ranking
1	Gediminas' Tower of the Upper Castle	2	2
2	The Bastion of Vilnius City Wall	7	27
3	The Cathedral	1	1
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	The Cathedral	3	1
2	Gediminas' Tower of the Upper Castle	1	2
3	The Town Hall	N/A	22
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	The Cathedral	1	3
2	Gediminas castle	2	1
3	Church of St Ann		7

#	Visit Oslo	Q ranking	VT ranking
1	TusenFryd Amusement Park	11	19
2	The Polar Ship Fram (Fram-museet)	7	12
3	The Viking Ship Museum	2	4
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	The Vigeland sculpture park	10	1
2	The Viking Ship Museum	3	4
3	Akershus Fortress	8	2
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Vigelandsparken	1	10
2	Akershus Fortress	3	8
3	Holmenkollen	N/A	N/A

#	Bergen Tourist Board	Q ranking	VT ranking
1	Fløibanen	2	1
2	Bryggen	1	4
3	Fresco Hall /	3	N/A
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	Bryggen	2	4
2	Fløibanen	1	1
3	Fresco Hall /	3	N/A
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Mount Fløien	1	1
2	Buildings, streets and Alleys	N/A (1)*	N/A (2)*
3	City centre / Waterfront / Parks	N/A (1)*	N/A (2)*

* The numbers in brackets refers to attractions in the category but they are not mentioned with a specific heading

Attractions in the Norwegian and Icelandic cities

Oslo and Bergen

Oslo's own top three does not match the top three of the tourists in the survey, and it does not at all match the online tourists at www.virtualtourist.com. Tusenfryd Amusement Park is ranked 11 in the survey and ranked 19 online, while the Viking Ship Museum is recognised as a top attraction among both groups of tourists.

Bergen gets a lot closer, with the same top three attractions in the questionnaire and the same first place as on www.virtualtourist.com.

Reykjavik

The Icelandic capital ranks the attractions close to both tourists groups. However, The Pearl is not ranked as high by online tourists as by the tourists in the survey.

#	Visit Reykjavik	Q ranking	VT ranking
1	Reykjavik Thermal pools	4	3
2	Hallgrímskirkja	1	1
3	The Pearl	3	6
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	Hallgrímskirkja	2	1
2	City Hall	4	5
3	The Pearl & Solfar Suncraft/ view point	3,11	4
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Hallgrímskirkja	1	2
2	Lake Tjörnin	N/A	N/A
3	Reykjavik Thermal pools	4	1

#	Visit Aarhus	Q ranking	VT ranking
1	The Old Town (museum)	1	1
2	AroS Aarhus Art Museum	3	3
3	Moesgaard Museum	5	3
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	The Old Town (museum)	1	1
2	Domkirke (the Cathedral)	4	3
3	AroS Aarhus Art Museum	2	3
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	The Old Town (museum)	1	1
2	Botanical Garden	6	11
3	Moesgaard, AroS & the	5,3,2	3,2,4

#	Wonderful Copenhagen	Q ranking	VT ranking
1	The Little Mermaid/Langelinie	1	3
2	Tivoli Gardens	4	1
3	Amalienborg Palace/The Royal Guard	5	6
#	**Questionnaire**	**TA ranking**	**VT ranking**
1	The little mermaid	1	3
2	Strøget	6	10
3	Nyhavn/Kongens Nytorv	16	2
#	**VirtualTourist.com**	**Q ranking**	**TA ranking**
1	Tivoli	4	2
2	Nyhavn	3	16
3	Little Mermaid	1	1

Attractions in the Danish cities

Copenhagen and Aarhus

The tourists of the survey in Copenhagen ranks Tivoli lower than both Copenhagen (first place) and the online tourists (second place). Basically, the list is close to tourists but Nyhavn seems more popular than anticipated.

Aarhus' top three is similar to the tourists', however the Botanical Garden is ranked much higher on www.virtualtourist.com than by the city and the tourists in the survey.

You are invited ***to discover*** *comfort, leisure and charming moments of relaxation and absorption in its ambience* (Vilnius tourist brochure, 2007)

We hereby invite you to ***find your*** *Oslo!* (Oslo Official Tourism website, 2008)

Helsinki offers visitors an endless number of possibilities. Just as Helsinki cannot be described in one word, **neither can it be experienced in just one way** (Helsinki Official Tourism website, 2008)

(Own Emphasis)

Experience design in the cities?

Many cities seem to underestimate the power of the city's atmosphere and "open" sights such as squares, streets etc.

The more traditional and spoken-off attractions are still must-sees for many tourists, but other types of attractions are also popular. All cities get at least some of the attractions right, but almost all cities seem to underestimate the popularity of at least one (for some even two) concrete attractions in the city.

Almost all the activities not designed too much by others rank highest in www.VirtualTourist.com. A lot of these activities are not included by the tourist organisations, e.g. Lake Tjörnin in Reykjavik and Botanical garden in Aarhus. Simultaneously, many of the already designed activities rank highest by the tourist agencies, but get a low score by online tourists. Examples count TusenFryd Amusement Park in Oslo and Grand Casino in Helsinki.

Many of the cities are well aware of the increased focus on tourists designing experiences on their own. This can be seen in the examples above from the tourist brochures and/or official websites. That being said, when compared with the top three lists there still seem to be a long way from word to action and many activities still remain pre-designed experiences.

Where to go from here?

One of the perspectives of the results is that if the tourism organisations still want to emphasize their top attractions, different strategies could be used.

One could be to highlight the existing top-three experiences, if these experiences are highly important for experiencing the city.

Another strategy could be to be inspired by the experiences tourists rank higher, thereby helping the tourists better. A possible pitfall with this strategy could be if the tourists by purpose seek off-the-beaten-path experiences and therefore deliberately prefer experiences not emphasized by the tourist organisations and/or guidebooks. Another effect could simply be that new experiences are then being “discovered” which could bring more diverse tourists to the city.

Otherwise, it could be interesting to divide the activities into different categories, which demand either high personal participation from the tourist or activities where the tourist is a rather passive recipient. According to this project, many tourists demand more and more personal and unique experiences when they travel, a point that should be greatly considered when the tourist agencies plan their activity-calendar.

Many of the attractions is of course possible to see as activities placed in between active and passive, entertainment and exploring. Moreover, all the mentioned activities are greatly visited by tourists, regardless of passive or active involvement. Probably, this is the most important perspective; it is just as much about how the tourists are experiencing than about what they are experiencing.

A challenge for all cities will probably be to simultaneously focus on the more popular and well-known attractions while also emphasizing activities and attractions showing a more diverse picture of the city.

Website analysis

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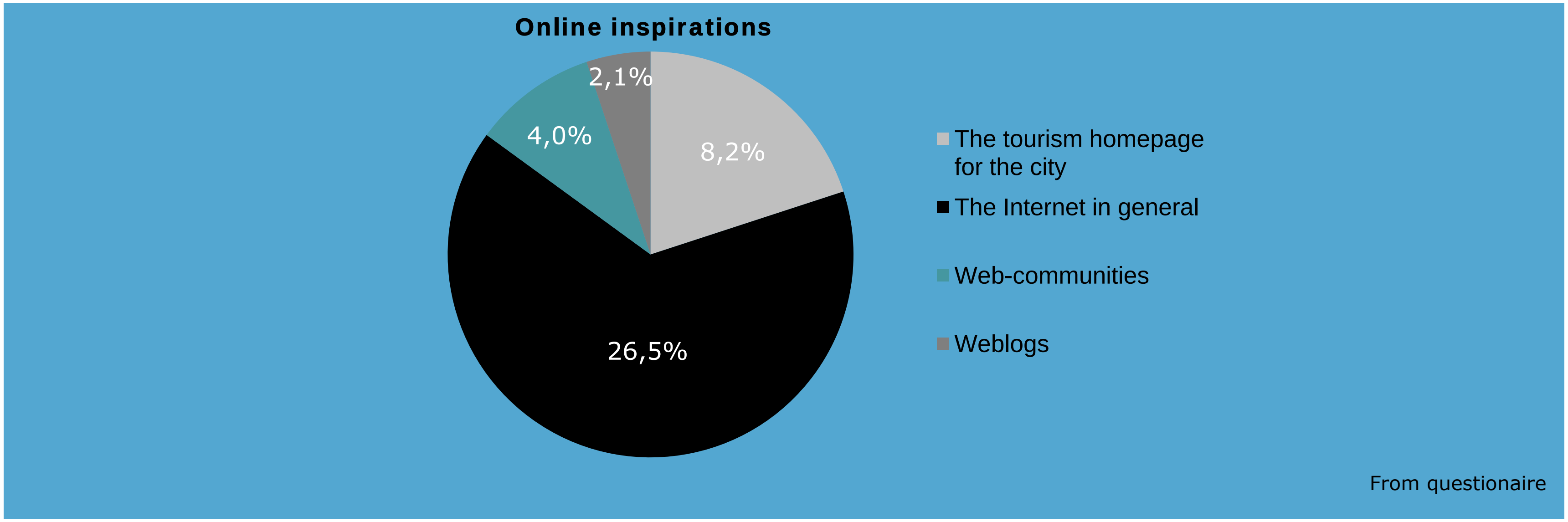

Image on tourism websites

Besides the questionnaire and the various analyses online, an analysis of the cities' tourist websites has been made. These official websites affect decisions tourists make in terms of attractions and activities in the city, i.e. the more appealing the website is, the greater is the chance for the tourist to decide what to do based on the official website. Simultaneously, browsing through the websites for the 14 cities might also influence where to go in the first place, e.g. deciding between Copenhagen, Oslo, Stockholm or perhaps none of them.

Defining an image

"Destination image is defined as not only the perceptions of individual destination attributes but also the holistic impression made by the destination"*

* 2003. The Meaning and Measurement of Destination Image. Charlotte M. Echtner and J.R. Brent Ritchie. *The Journal of Tourism Studies.* Vol. 14, No. 1. pg. 43.

How tourists experience the particular cities is of high relevance, according to the definition of an image above. Here the consumers are branding the destination together with the tourist organisations and other local stakeholders. As such, an analysis of how the cities are being portrayed online, and hence given a certain image, is a logical part of experience design in city tourism. Previous section has focused on how online communities portray the cities. This section will focus on the other end of the image branding made by the 14 city tourism organisations.

If we look isolated at tourists who go online looking for inspiration, only 8,2% use the official tourism websites as inspiration when going on holiday. Most of the tourists use the Internet in general 26,5% whereas a little group uses other types of online websites, which appear more user-driven, that is web-communities and weblogs. However, these figures overlap, as it was possible for the tourists to mark up to five inspiration sources.

Official websites:

AAR	visitaarhus.dk
COP	visitcopenhagen.com
MAL	malmo.se/turist
STO	stockholmtown.com
UPP	uppland.nu
BER	visitbergen.com
OSL	visitoslo.com
HEL	hel2.fi/tourism
TUR	turkutouring.fi
TAM	tampere.fi/english/tourism
TAL	tourism.tallinn.ee
RIG	rigatourism.lv
VIL	vilnius-tourism.lt
REY	visitreykjavik.is

Website analysis

As indicated earlier, one of the main objectives of this project is to exemplify the links between the city tourism organisations' design and communication of different types of experiences in their city and how the tourists actually experience the city. This has been done through the extensive questionnaire as well as various web communities, as the report has shown so far.

However, it is also necessary to analyse the official tourist websites, which are per definition not designed by tourists but by the tourism organisations and are meant to provide inspirations to the tourists. The reason for the inclusion of this analysis is to obtain a more holistic understanding of the influences of the Internet on travel decision and inspiration.

The analyses of the websites have been done through three different parameters: the colours, communication methods and functions/features on the websites*.

More thorough analyses have not been done as the focus in the report is mainly on the field research. However, as indicated above the analyses are included for comparison purposes.

* The website analysis has been conducted with inspiration from the website www.webfighter.dk. The symbolism of colours have been analyzed with the aid of the website www.fmb.dk/scoop/virkem_billed_analyse.htm#farve (Both websites are in Danish only)

#	RED	BLUE	GREY	GREEN	WHITE	ORANGE	YELLOW
COP	X	X	X				
AAR		X	X	X			
STO		X	X	X			
UPP	X				X		
MAL			X				X
OSL	X		X		X		
BER					X	X	
HEL		X		X	X		
TUR		X		X	X	X	
TAM					X	X	
RIG		X					X
VIL	X			X	X		
TAL	X	X	X				
REY		X		X	X		

Colours on the websites

By looking at which colours dominate the websites, it is possible to do an analysis on what these colours signal to online users. It is, however, important to bear in mind that the ways colours affect you is culturally and to a certain extent also individually based. Furthermore, the connotations one gets with certain colours are also context-dependent.

Blue is a colour on most front pages (9 out of 14). Blue is said to enhance concentration and display calmness. The colour signifies stability, yet also something that stands still, perhaps lack of creativity. As such the websites from Copenhagen and Tallinn works well, as they combine the blue with **red** colours, which stand for activity, change and movement, e.g. innovation and progress.

Green is in many places combined with the blue colour. Green stands for hope, change and growth and works therefore well with the rather static blue colour. Examples are Stockholm, Reykjavik and Helsinki. On the other hand, the combination of blue and green indicates a more neutral and cool image, whereas the inclusion of warm colours, such as red and yellow can bring more balance to the site (see above).

White is also a colour that is very dominating (9 out of 14 websites). Quite interesting, when the colour is a sign of vulnerability and emptiness. The latter tends to show by giving the impression that the website is unfinished, mostly because the white colour is placed among very strong colours, for example on the Tampere, Helsinki and Bergen websites.

#	SPECIFIC THEMES WITH/WITHOUT VISUAL ELEMENTS	TRADITIONAL LEFT COLUMN WITH POINT FORM	VIDEO AND/OR PHOTOS OF THE CITY (DIRECTLY OR VIA LINK)	SUMMARY OF VARIOUS INFORMATION WITH OPPORTUNITY TO READ MORE	EVENT CALENDAR DIRECTLY ON FRONT PAGE
COP	X	X		X	
AAR	X	X	X	X	
STO		X	X		
UPP		X	X	X	
MAL	X	X	X	X	
OSL	X	X			X
BER			X	X	
HEL		X	X	X	X
TUR	X	X		X	
TAM			X		X
RIG	X	X			X
VIL		X	X		X
TAL	X				X
REY	X			X	

Communication

Within the topic communication it has been examined how the websites convey up-coming events, new initiatives and other issues about the city.

Some of the web sites have boxes with **Specific themes**. They are inspiration for experiences in the city, for example Copenhagen has themes such as *Top 10 alternative things to do* and *Organic Copenhagen.* Oslo has *Oslo on a budget* and *10 favourites*, while Aarhus for example has *Gastronomy* and *Aarhus for kids*. This setup is very similar to the more traditional **summary** of topics, which is used by more websites.

All of the websites use either **video / photos** or both. Some sites so this better, e.g. slide shows and videos. Having these directly on the front page is to prefer as opposed to having to go through several links. The slide shows display the city as alive and constantly being up-to-date.

6 out of the 14 cities have an **event calendar** on the front page. Some of the sites also have a *what's on today*. The event calendar is very useful for the users and it is important that the calendar is visible, as up-coming events have a very strong influence on deciding to go to a specific city or not. Websites such as Stockholm, Oslo, Reykjavik and Copenhagen are very good at focusing on events.

Half of the web sites use a **left column** with links to various topics, such as about the city, events and restaurants. This layout is however very traditional and gives the impression of being "stuck in time". On the other hand, it is very easy for the user to locate topics, which might be difficult if this information is placed differently from what users are accustomed to.

#	PHOTOSLIDE SHOW	HOTEL BOOKING	LINK TO BROCHURE DOWNLOADS	BUY DISCOUNT CARD	LINK TO PHOTO/VIDEO
COP	X	X		X	
AAR	X	X	X	X	
STO		X	X		
UPP		X	X	X	
MAL	X	X	X	X	
OSL	X	X			X
BER			X	X	
HEL		X	X	X	X
TUR	X	X		X	
TAM			X		X
RIG	X	X			X
VIL		X	X		X
TAL	X				X
REY	X			X	

Functions/features

Many of the websites offer the possibility of **booking hotels** directly or through a link from the site (10 out of 14). Most likely a feature all the agencies offer, yet it is not visible on all sites, which means it could mean loss of income. Hotel booking is very visible on for example the websites from Copenhagen, Oslo, Aarhus and Uppsala.

Also more than half of the websites contain a **Photo-slide show** (8 out of 14). This feature dominate the website, as seen with Aarhus, Copenhagen and Turku, for example. Riga also has it, yet here the images are moving too slowly. Tallinns website has taken the slide show a step further and on their front page is a live video with sound. The risk of this is of course that some computers might not have the Internet speed to run the video smoothly.

Links to **downloading brochures** are visible on more than half of the websites (8 out of 14). With the Internet playing a more and more significant role in holiday planning, these brochures are most likely soon outdated. Furthermore, most of the information is already found on the website.

The danger with brochures is also that their content is quickly *old news.* With the website it is possible to refresh on a daily basis, which thereby give the impression of a dynamic city with a lot of experiences. Data from the questionnaire also indicate that a small amount of tourists use the brochures while on holiday

(Lack of) Social media on the websites

None of the websites involve the users, - the possible tourists. Any questions people might have to be asked through a personal email. This means that the tourist agency can receive a great deal of similar emails and have to spend heaps of time answering these. Time that could most likely be spend in other areas.

Most of the websites have tried to overcome this issue by having a **FAQ** (frequently asked questions) link. These questions have probably once been posed by users and then modified by the tourist agencies. However, they may also be questions the tourist agency thinks the tourists need answers on and as such do not necessarily reflect requests by the users. All that being said, the FAQ is an important feature of the websites, yet it does not display movement, only static and thereby perhaps old questions. For this reason, a possible hurdle could be if some people need answers on a specific up-coming event.

Since the visitors are not contributing to the information on the official tourism website, the online social forums, such as www.virtualtourist.com and www.tripadvisor.com are still expected to play a more and more significant role in shaping the image of the particular city. An analysis on the shifting of heard voices on the Internet says that "the social media is examples of how a democratisation of the online information, which transforms the Internet user from a simple context reader to a context provider, has happened"*. Within tourism experiences this means that the tourists become co-designers of experiences, as they have their own opinions about certain events and the like, which thereby shape the images of these activities.

*From the article: Social Media, Social platforms & Web 2.0, 2008, Go Narrow (see first section in this chapter)

Web 2.0 in the near future

The tourist organisation from Copenhagen has taken a great step of involving the users. So far only in Danish is it possible to read about various traveller's tips and reviews about bits and pieces in Copenhagen and its surroundings. Soon there will be a Swedish version as well and it is the plan to make an English and German version as well in the near future. The site will also be visible on the official website. The reason for making a site like this is described very well by the people behind the concept:

*__Dit__København (__Your__Copenhagen) is a user-driven inspiration website for different experiences (...) On this site travellers write about their own good advice, tips and ideas (...) __Dit__København has been set up because we know that travellers often find their own unique experiences and that they hardly ever follow the beaten path (...) __Dit__København gives you the option of being heard and to read about other travellers' good advice**

Visit Oslo has also launched a tips and reviews section on their website and on the Stockholm site it is possible to blog with employees from the tourist information centre.

So who knows if more will follow the same trend. That being said, the question that remains after all these new initiatives is whether the tourists will start to use these sites instead of or perhaps as a supplement to the social media websites like the ones analysed earlier in the report.

*From www.visitcopenhagen.dk, translated from Danish into English

Cases

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21 innovative tourism products

Introduction

In this section, a compilation of 21 innovative tourism products (concrete products identified by the tourist organisations in all participating cities) will be highlighted, and a few of them will furthermore be used more in detail to assess how they work with experiences. These innovative offers will also be categorized in terms of how they involve their customers.

As mentioned, all participating cities have been asked to identify innovative initiatives in their city. The contributions from the cities should therefore be viewed as initiatives that at least the city tourism organisations see as innovative on that specific market.

However, as e.g. audio guides have been mentioned by many of the cities, this specific type of product is only represented once (i.e. OnSpotStory from Malmo) in order to provide a list of various kinds of offerings.

The 21 cases

The 21 different cases represent a broad spectre of tourism products experiences, from museums to restaurants, from amusement parks to trams, from guided walking tours to making your own jewellery. The cases will be described in general terms in different parts below.

After the introduction to all specific cases, the cases are analysed in three ways:

Firstly, the cases are analysed in terms of the type of innovation they represent seen from the supplier side, using a well-known theoretical model.

Secondly, the cases are analysed in terms of the level of participation seen from the user's points of view, again using a well-known model.

Thirdly, some of the cases are analysed in terms of what qualifications and competencies that are needed to design these experiences.

Copenhagen & Aarhus

Madeleines Foodtheatre, Copenhagen

"Madeleine's Foodtheatre" is a restaurant – but they are serving the food in a setting that resembles the theatre with lights, sound systems, special effects etc. At Madeleine's, the meal is reinvented as a play of the theatre, stimulating every sense in order to amplify the event of eating, making the evening entirely unique, luring the audience to taste and feel the meal in a completely new way.
www.madeleines.dk

Baisikeli, Copenhagen

With the company Baisikeli the tourists can experience Copenhagen the way the locals do, by biking around the city. Renting a bicycle from Baisikeli, does not only have a very personal approach, it also means that you as a customer supports a bicycle project in Africa. The customers are thereby both part of a good story (ethical consumers) as well as obtaining great local experiences.
www.baisikeli.dk

Taste the art, Aarhus

ARoS Museum hosts the event "Taste the Art" that makes a synthesis of art and cooking in the museum's exhibition. Chefs and gastronomists are meeting up in the museum to cook food that pleases all senses and interests, including the sight and the interest of fine art.
www.aros.dk

AudioMoveDrama, Aarhus

A small theatre "Katapult" presented a so-called AudioMoveDrama during the Aarhus Official Festive Week in September 2007. The interactive play was titled "Corridor", and featured the customer as both tourist, actor and audience in one and same character. The stage requisites included a mobile phone, a set of ear plugs, a city map and a couple of surprise props. It is a new and different way of seeing and experiencing a city.
www.katapult.dk

Stockholm, Malmo & Uppsala

ABBA the Museum, Stockholm

ABBA the Museum is currently under construction in Stadsgarden in Stockholm and opens in June 2009. It will be an interactive event building with the legendary Swedish band ABBA as a theme featuring the latest technology within the fields of sound, visuals, multimedia and communications. The visitors will be able to participate in the history of ABBA, by singing and dancing like ABBA but also experience how it was to be ABBA on stage in those days.

www.abbamuseum.com

OnSpotStory, Malmo

"OnSpotStory" is a new and easy way to explore Malmo by foot. The customer have to use her own mobile phone, and in that way learn more about Malmo, including historical highlights, what the city is like today and much more.

www.malmo.se/turist

"The Food Caravan", Malmo (& Stockholm)

"The Food Caravan" is an inspiring guided walking tour in, for many locals and tourists, exotic Asian and Middle East stores with different kind of food and flavors. It lasts 2 hours and include tastes and interesting stories.

www.matkaravan.nu

The Linnaeus 300th Birthday, Uppsala

The celebration of world-famous natural scientist and botanist Carl Linné contains many different elements, e.g. guided walking paths similar to those of his time, art exhibitions in the Botanical Garden.

www.linneuppsala.se

Oslo & Reykjavik

Klima X, Oslo

The interactive exhibition shows how the technological development has led to climate challenges of today, but also how technology can solve many climate problems. Amongst other things, the audience gets to put on rubber boots and walk in water throughout the exhibition in order to feel the consequences of the climate changes on their own body.
www.tekniskmuseum.no

The Ibsen quotes, Oslo

The concept of The Ibsen Quotes brings fine culture to street level using quotes from famous playwright Henrik Ibsen’s work. The quotes have been placed on the pavements in the main streets of Oslo using letters made of iron.
www.ibsensitat.no

“Reykjavik 871±2”, Reykjavik

The exhibition Reykjavik 871±2 is based on the archaeological excavation of the ruin of one of the first houses in Iceland as well as findings from other excavations in the city centre. The exhibition is located in Reykjavik old centre, on the corner of Adalstraeti and Sudurgata. It was awarded "Best Design of Digital Experiences in Museums" at Nodem Award 2006.
www.minjasafnreykjavikur.is/english/desktopdefault.aspx/tabid-1780

Videy Island, Reykjavik

A unique site that combines history, culture and nature. The first stone houses in Iceland are now restaurants, and the oldest church is still standing. Furthermore, The Imagine Peace Tower (a work of art conceived by the legendary artist, musician and peace advocate Yoko Ono) will every year emerge between October 9th (Lennon's birthday) and December 8th (the day of his death) for world peach.
www.visitreykjavik.is/desktopdefault.aspx/tabid-17/12_view-68

Turku & Helsinki

Moominworld, Turku

Moominworld theme park is the place where these famous children characters come alive. Moominworld offers many different activities and the use of theatre is important. It is based on the idea that children learn by doing themselves and also the fact that nature, family, friendship and adventure are important for all children.
www.muumimaailma.fi/englanti/

HiTec, Helsinki

HiTec Helsinki takes your group to see the Helsinki City attractions in a new way. You will visit famous attractions like the Senate Square as well as some more unknown places as an interactive team competition. Participants form teams that are equipped with Nokia imaging mobile phones (mobile phones with camera) and the participants are then led through a series of tasks.
www.seefinland.com

Cooking by Campfire, Helsinki

The joy of cooking combined with an opportunity to enjoy the nature and beautiful surroundings. Guided by a professional chef, everyone has a chance to take part in turning the fresh ingredients into a delicious meal cooked by campfire. A self-prepared meal in these unique surroundings, spiced with the effect of fresh air – how could any meal taste better?
www.seefinland.com

Make your own piece of jewellery, Helsinki

At Union Design Jeweller´s Exhibition you will see goldsmiths at their work. You will participate in making your own piece of modern silver jewellery guided by a goldsmith. And you get to take the piece of jewellery with you home.
www.seefinland.com

Tallinn, Riga & Vilnius

Bicycle sightseeing, Tallinn

The original bicycle sightseeing tour "Welcome to Tallinn by bike‟ is an easy-going bicycle tour, usually in a small group (up to 10), where you can cycle and admire the surroundings, meet other tourists, ask questions and find out other things to do in Tallinn.

www.citybike.ee

Hidden Secrets of the Tallinn Dominican Monastery, Tallinn

The journey starts with a torchlight procession through an ancient archway. Inside the monks’ chamber at the monastery, candle flames flutter, the aroma of herbs is in the air and a cauldron bubbles.

www.restlingevent.ee

“Retro Tram”, Riga

One of Riga's means of transport, the tram, steps back a century and should attract plenty of tourists. The tram has undergone a complete restoration to become the Riga Art Nouveau Tram, a replica of the type of vehicle that shuttled Rigans around the city circa 1901.

No website

Theatrical Tours, Vilnius

Get to know more about Vilnius by attending one of many theatrical tours, for example: national evening, Noblemen’s feast, trip to medieval city, Vilnius legends – a ghostly trip.

www.vilnius-tourism.lt

Velotaxi, Vilnius

You will be picked up and returned to your hotel on this tour where you will see more of Vilnius than on any other tour. You also have the option of taking your own route. The Velotaxi guides are true specialists with a passion for their city.

www.velotaksi.lt

Technological innovation New technological solutions	Complex innovation Both technology and market is new
OnSpotStory, Malmo Reykjavik 871±2, Reykjavik	AudioMoveDrama, Aarhus HiTec, Helsinki
Differentiated innovation Compete on quality & features	Architectural innovation Technology or experiences are combined
Moominworld, Turku The Food Caravan, Malmo The Linnaeus 300th birthday, Uppsala ABBA the Museum, Stockholm [ALL OTHER PRODUCTS]	Madeleine's Food theatre, Copenhagen Taste the art, Aarhus Baisikeli, Copenhagen Ibsen Quotes, Oslo Theatric tours, Vilnius

Types of innovation (supplier)

Theoretical contributions within innovation are focusing very much on innovation as a way to carry out the potential economic growth and new job opportunities in sales of experiences.

When looking at the novelty among the best practice cases from the city tourism, they all have an element of innovation – by for example combing a restaurant and a theatre like Madeleine's Foodtheatre, or based on novel technology and new way of exploring the city such as AudioMovieDrama.

The model above is categorizing different kind of innovations among the best practice cases based on a slight adjusted model from Tidd* that categorizes different kind of innovations based on the novelty in technology and in the market.

When categorizing the types of innovations in this way, Tidd's main objective is to examine how technologies and markets affect the process of marketing an innovation. Hence, it is a good idea for the different tourist products to be aware of what kind of innovation they are addressing, in what category they want to be, and based on this use the right tools to develop that kind of innovation.

For example, it could be useful with marketing tools such as conjoint analysis to find variations of existing products, segmentation for well understood products and markets, and how the relationship between developer and users is more important in novel and complex products. However, as the marketing aspect is not the main focus in this rapport, the model will solely be used to categorize different types of innovations in regard to the maturity of technologies and market.

When looking at the different innovations the technological and differentiated innovations are the ones that are closer to the existing offers in the markets, while architectural innovation and complex innovation are the ones most novel to the market. What is interesting about the picture above is that most cases are within a very "safe" environment – both technology and market is well known to customers. Hence, they are easy to get to and understand.

* 2005. Tidd, Joe, Bessant Johh & Pavitt Keith. *Managing Innovation.* 3rd. Edition. John Wiley & Sons

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Differentiated innovation

In differentiated innovation, the technology is well-known to the market, and most innovations consist of the improved use – in terms of packaging, pricing and support – of existing technologies. Examples of this are theme parks like Moominworld where the theme is what differentiates it from other theme parks, or different types of guide tours – be it by bicycles, walking or other means of transport.

Technological innovation

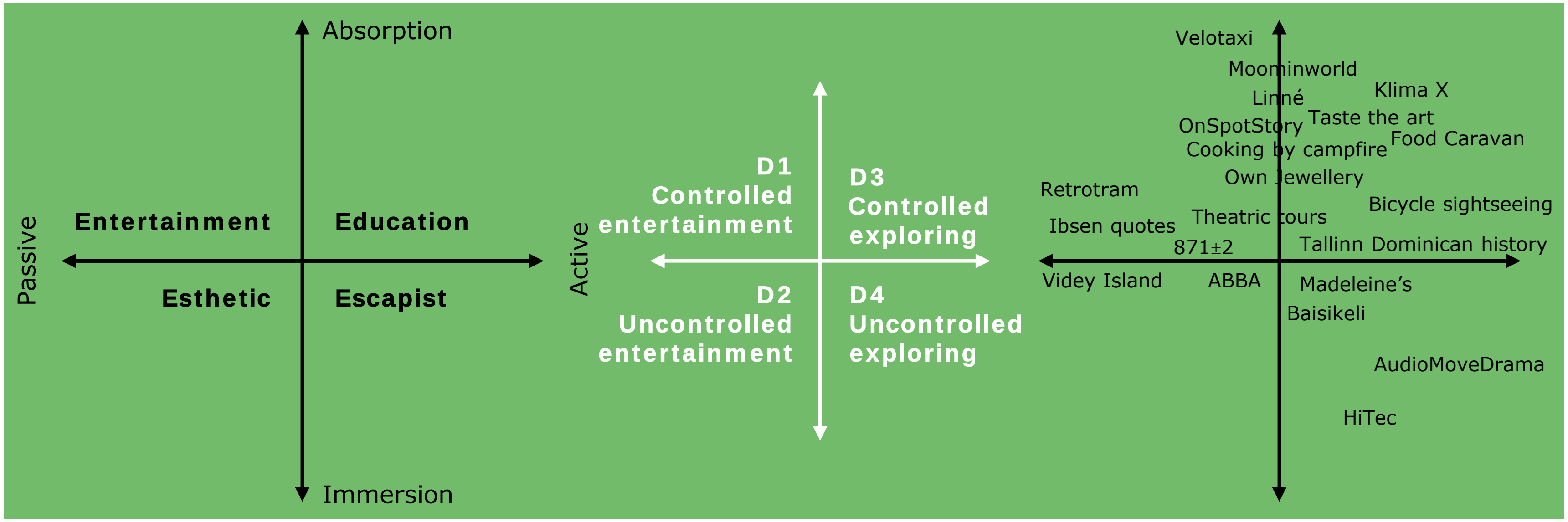
In technological innovation, new technologies are developed which satisfy known customer needs. Such products and services compete on the basis of performance, rather than price and quality. An example of this is the audio guide OnSpotStory in Malmo which is a new way of offering guide tours by new technology based solutions.

Architectural innovation

In architectural innovation, the only difference to technological innovation is that *existing* technologies are further developed to satisfy known customer needs. Looking at the best practice cases in this category, they are mostly combining existing offers – e.g. restaurant visit and theatre like Madeleine's Food theatre or food and art like 'Taste the art'. Furthermore, there are also examples of existing technology applied in new ways like for example the Ibsen quotes.

Complex innovation

In complex innovation, both technologies and markets are new and co-evolving. In this case there is no clear defined use of new technology, but the use is being innovated in the process. In the best practice cases HiTec Helsinki and AudioMoveDrama represent this category of innovations. Even though the cases are more novel in terms of the market than technology they co-evolve into something not previously available.



Level of participation (user)

Pine and Gilmore's* model of the four realms of an experience provides a good overview of different experience offers in terms of level of guest participation as well as the kind of connection or relationship that unites the customer with the event or performance.

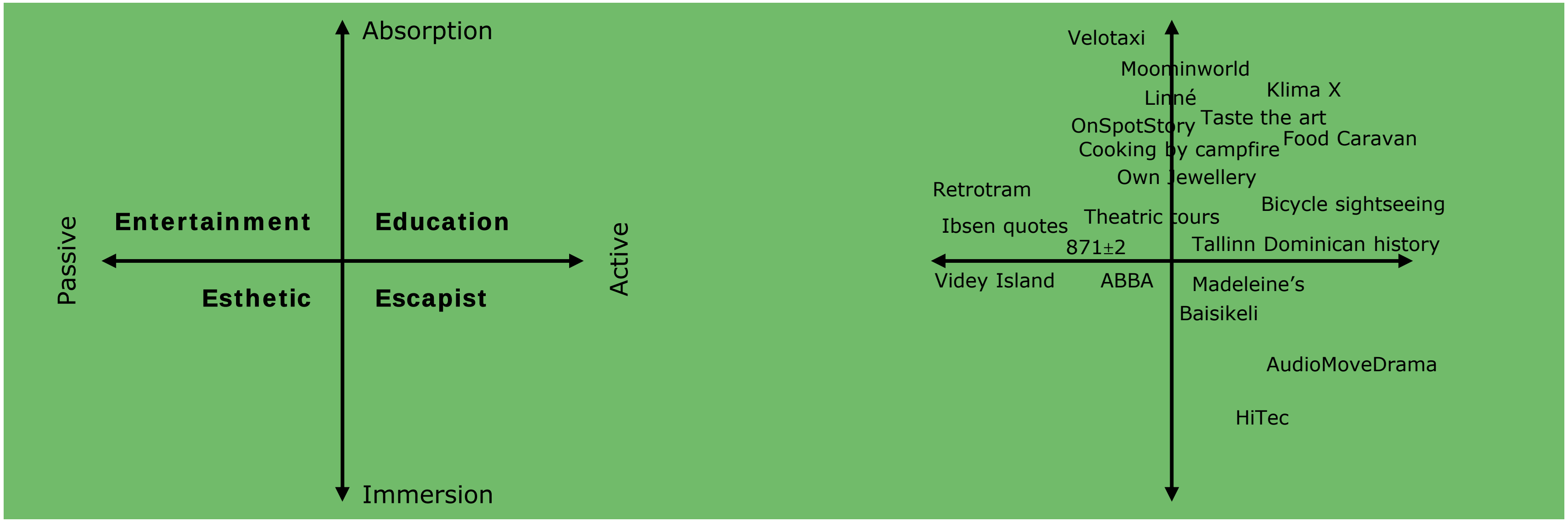
On one axis you find absorption that keeps the attention of the guest by bringing the experience into the mind of the guest. On the opposite side is immersion, where the guest becomes a part of the experience and "enters" the experience. This is comparable to the experience design figure (p. 10, 16, 101) where experiences designed by others equal absorption and experiences designed by oneself equal immersion. When it comes to participation it is either passive participation where the consumer do not influence the staged experience, or active participation where the consumer influences the staged experience. Again, this is comparable to the experience design figure, where entertainment equals passive participation and exploring equals active participation.

* 1999. Joseph Pine II & James H. Gilmore. *Work is Theatre & Every Business a Stage.* Boston: Harvard Business School Press

Based on these two dimensions, Pine and Gilmore suggest four different experience realms:
Entertainment, Education, Esthetic, and Escapist.

As with the model of innovation, mapping the level of participation and involvement is also based on a subjective point of view (based on the information, and some interviews with the initiatives). Also, it is important to state that no realm of experience is better than the others (as it all depends on what kind of experience a particular individual is in need of or are looking for). Pine & Gilmore argue that the best experience is when all different elements are offered within one single initiative. However, when speaking about the city tourism industry, the customer might see the whole stay in a city as one experience, hence, as long as a city can offer initiatives within all areas the tourists' wishes and wants can be covered.

Using all best practice cases from the cities, the spread on the offers in relation to Pine & Gilmore's four realms looks as the figure above.



Entertainment
Entertainment means passive absorption in the staged experience – as for example going to the movie theatre. Of the 21 cases, it could be going on a tour in the retro tram and also theatric tours where the tourists themselves are not particular involved.

Education
The consumers actively participate through creative thinking and experimenting. Within tourism an example of this could be Klima X or The Food Caravan, but also making your own jewelry and cooking by campfire.

Escapist
Escapist experiences demand an actively participating consumer that is absorbed in the experience. An example of this could be the AudioMoveDrama or HiTec Helsinki where the participant becomes part of the story.

Esthetic
The consumer is absorbed in the setting, but leaves it untouched as the experience is very passive. An example of this could be a museum, but there are none of these kind of offers among the best practice initiatives as the aim of the ABBA museum is to create a more active participation than most museums and the Klima X exhibition also challenges the user to a high degree.

Competencies needed to design experiences

'Experience design' contains two elements - to design and to create experiences. It is a continuation of previous ideas of ideal design and principles that try to integrate design solutions and make them technically useful, user friendly and experiential. In this regard, experience design can be viewed as a new phase in the history of design, being different from product design etc.

Jordan* states that the ideals have gone from functionality (ca. 1920-1975 – where the product should be technically useful in solving the problem) to usability (ca. 1975-1995 – where the product should be easy to use, thus focusing on the interface between the user and the technical aspects) to pleasurability (from ca. 1995 – where the product should be fun to use, thus focus on the emotions that it evokes).

The scientifically approach to Experience Design require the skill to understand and anticipate the aesthetic, emotional and creative processes that takes place within the individual and translate these into technological and economical experiences. A designer of experiences should ideally both have a basic insight into technological production processes (engineering skills) and master the principles of sound business practice. Furthermore, the designer should be able to use these competences in an innovative way*.

*2000. Jordon, Patric W. *Designing Pleasurable Products.* London: Taylor & Francis.

Adding to the above Pine and Gilmore state that: "Adding sensory phenomena obviously requires businesses to employ technicians who know how to affect our senses" (p.61). To have this expertise is critical as it is not only important to affect our senses but to do it in a way that also makes sense. The expertise could for example be architectural and musical skills. They even predict that in the future there will be "sensory specialists" instead of A/V technicians for meeting in hotels (*Ibid*).

On the following page, a presentation of the persons behind the stage at three different cases is done in order to highlight some specific competencies and ideas from the founders of some tourism products.

*2006. Jantzen, Christian & Mikael Vetner. *Oplevelse – Et videnskabeligt glossar*. In: Jantzen & Jensen (eds.) Oplevelser: koblinger og transformationer. Aalborg Universitetsforlag. p. 258.

AudioMoveDrama

The AudioMoveDrama “Corridor” is produced in cooperation with KMD A/S (IT), Visit Aarhus (the local tourist organisation), Århus Festive Week (a local initiative taking place each year) and the Alexandra institute (mobile technology - cyber tech technology) as well as sponsors such as TDC (provider of communications solutions in Denmark) and Kinovox (provider of professional equipment for broadcast).

Besides this, the idea creators and storywriters have for years been working with theatre and developing Danish drama. The sound techniques have been developed in collaboration with Aarhus theatre’s sound studio. Hence, many different specialists have been involved.

Baisikeli

The two founders of Baisikeli have knowledge about Copenhagen, and they are both passionated cyclists. “We think this is really fun to do, and that is of course something people notice when they come to our shop” (interview).

But the founders are only dealing with the people, all other parts of the business happens elsewhere – there is a social workshop that takes care of everything related to the bicycles, and furthermore a network of guides, and local shops that prepares the picknick basket that customers can buy (this is also popular among the locals).

Madeleine’s Food Theatre

Madeleines Food Theatre is created by the experienced theatre/production designer Nikolaj Danielsen and culinary doyen Mette Sia Martinussen together with a creative board of experts that is based on 50% science and 50% art. This group includes a person working with anthropology and drama, a sense specialist, a brain researcher, a psychotherapist, a musician, an installation artist and a performance artist. Furthermore, technicians are called in for special assignments. Hence, professionals from many different professions are represented.

Appendix 1: Questionnaire

s. 180

Developing the questionnaire

Background

Many tourist destinations conduct surveys among their visitors in order to get to know them better. Most of these surveys focus primarily on the satisfaction with e.g. accommodation, the tourists' expenditure and their length of stay.

In this project, we wanted to develop a more innovative questionnaire that would give better possibilities for interesting and relevant analysis to use for strategic implementation.

Hence, we used the term experience design to focus primarily on the experiences that the tourists have before, during and after the holiday itself – as suggested by the research team in "Experience design as a concept". In this sense, we have tried to get closer to the tourists and their inspirations, reasons to go, motivations to experience, perceptions of the city, their best and worst experiences etc.

We have collected the data in two parts to be able to cover the before and during of the holiday experience (interviews collected in the tourist information centres) and the after of the holiday experience (interviews collected electronically after the holiday). In developing the questionnaire, we focused on different levels of behavioural analysis, from very specific behaviour (e.g. to visit a specific attraction) to more abstract behaviour (e.g. the attitude towards being passively entertained).

The questionnaire was developed with input from the research team, previous surveys compiled by Wonderful Copenhagen and feedback from the project participants.

Language versions

The questionnaire was made available in 15 languages which besides English count:

- Danish
- Swedish
- Norwegian
- Finnish
- Icelandic
- Estonian
- Latvian
- Lithuanian
- German
- French
- Italian
- Spanish
- Polish
- Russian

Questionnaire

Part 1

The first part of the questionnaire contains 19 questions covering the most important background variables about the tourists (age, gender, travel group, length of stay) and their reasons to go, where their inspiration to go came from, what they want to do while they are in the city, what image they have of the city and what types of experiences they prefer.

It has been answered by a total of 5.040 tourists, most of which are found in the larger cities (in terms of number of tourists and also in terms of inhabitants). All tourists were recruited in or nearby the cities' tourist information centres.

The table to the right summarises the number of respondents in part 1 and part 2 divided by city.

City	Part 1	Part 2
COP	600	300
AAR	207	108
MAL	404	206
UPP	200	117
STO	600	284
BER	204	106
OSL	602	275
TAM	203	107
TUR	204	113
HEL	603	302
REY	209	126
TAL	400	200
RIG	400	200
VIL	204	72
ALL	5.040	2.516

Part 2

Part 2 of the questionnaire has been answered by app. half of the tourists, namely 2.516 tourists. The 5.040 tourists were contacted again one month after the holiday, and asked to complete a second part of the questionnaire online.

In the second part, the questions investigated other background variables (aspects such as level of education, place of living, form of transport, travel patterns) as well as the best and worst experience and recommendations for what to do in the city. Moreover, a number of the questions from part 1 has been re-posed, to see how satisfied the tourists were with different aspects about the city.

Questionnaire: Part 1

Q1.1 [single]
Are you here in **city** as a leisure tourist (one-day visitor or overnight visitor)?
1:Yes
2:No

Q1.2 [open]
What is your name and email address?

Q1.3 [single]
What is your home country?
[A list of 56 nationalities]

Q1.4 [single]
How many nights do you plan to stay in >>name of city<<?
1:One-day visitor
2:1 night
3:2 nights
4:3 nights
5:4 nights or more
6:Do not know
7:Do not want to answer

Q1.5 [single]
What is your gender?
1:Male
2:Female

Q1.6 [multi]
Who are you travelling with?
1:Alone
2:With a partner/wife or husband
3:With friends or acquaintances
4:With a group – an arranged group tour
5:With my family – with children
6:Other, please specify
7:Do not know
8:Do not want to answer

Q1.7 [open]
How many are you travelling with beside yourself?

Q1.8 [single grid]
Please indicate the age of the adults and/or children in your travel group, including yourself?
1:You [respondent]
2:Person 2
…

1:0-4 years
2:5-9 years
3:10-14 years
4:15-17 years
5:18-25 years
6:26-30 years
7:31-40 years
8:41-50 years
9:51-60 years
10:61 years or more

Questionnaire: Part 1

Q2.1 [multi]
What are/were your five main reasons for going to **city**?

1:History of the city
2:Architecture and design of the city
3:The atmosphere of the city
4:Previous visit
5:To visit people you know
6:Recommendations from family, friends or similar
7:Shopping
8:Eating and drinking
9:To get to know local people
10:Low cost of transportation to city
11:Low cost of stay in city
12:Night life
13:To relax
14:To spend time with my travel group (family, friends etc.)
15:Specific accommodation unit, please specify
16:Specific event, please specify
17:Specific attraction, please specify
18:Other, please specify
19:Do not know
20:Do not want to answer

Q2.2 [flexible scale 1-100]
How do/did you expect **city** to be on the following attributes?
*[Please use your mouse to indicate a point on the line, which you find appropriate for your experience of **city** on the following attributes]*

1:Romantic (a city that inspires to romantic and intimate experiences)
2:Expensive (a city where everything costs a lot)
3:Cultural (a city with a large offer on stage performances, music, museums, etc.)
4:Modern (new architecture and design, young, lots of things going on, modern cafes etc.)
5:Charming (a city that you instantly like, a city that is cosy)
6:Historical (a city with many old buildings, statues, monuments etc.)
7:Small (a quiet city that you can see and do in no time etc.)
8:Green (a city with a lot of trees, parks, flowers etc.)
9:Unique (a city like no other cities)
10:Rich on events (a city with a lot of large sports and culture events)
11:Clean (a city with no garbage in the streets, no pollution etc.)

Q2.3 [multi]
Where and how did you get inspired to visit **city**?
1:The tourism homepage for the city
2:The Internet in general
3:Tourism brochures
4:Wanted to visit family or friends in the city
5:Recommendations from family, friends, colleagues etc.
6:Travel agencies
7:Guide books
8:Web-communities (www.tripadvisor.com etc.)
9:Weblogs (Blogs)
10:Articles in a newspaper or magazine
11:Advertisements in a newspaper or magazine
12:TV/radio programmes
13:A previous visit
14:Other, please specify
15:Do not know
16:Do not want to answer

Questionnaire: Part 1

Q2.4 [multi]
When you planned this trip to **city**, which of the following other cities did you consider going to?
1:Copenhagen, Denmark
2:Aarhus, Denmark
3:Malmo, Sweden
4:Uppsala, Sweden
5:Stockholm, Sweden
6:Bergen, Norway
7:Oslo, Norway
8:Tampere, Finland
9:Turku, Finland
10:Helsinki, Finland
11:Reykjavik, Iceland
12:Tallinn, Estonia
13:Riga, Latvia
14:Vilnius, Lithuania
15:Other city/cities
16:Did not consider other cities
17:Do not know
18:Do not want to answer

Q2.4a [open]
When you planned this trip to **city**, what other cities did you consider going to?
[Please write the city and the country]

Q2.5 [multi]
What are you going to do while you are in **city**?
1:I want to party and have fun
2:I want to know more about the city and its history
3:I want to get in touch with the local citizens
4:I want to see places and sights that are new, modern and different
5:I want to visit the city's historical museums
6:I want to experience the cultural life, e.g. theatres and art exhibitions
7:I want to see the most famous attractions
8:I want to do shopping in general
9:I want to do exclusive shopping (luxury)
10:I want to engage in a special hobby/interest
11:I want to experience the city's underground environments
12:I want to visit some of the city's trendy in-places
13:I want to visit some of the attractive restaurants and/or cafes
14:I want to primarily spend time with friends and/or family
15:I want to relax and recharge batteries for work later on
16:I want to experience some of the less known but exclusive attractions
17:Do not know
18:Do not want to answer

Q2.6 [flexible scale 1-100]
When you are a city tourist, what kind of experiences do you generally prefer?
1: Experiences that are MAINLY designed by others (e.g. a sightseeing tour) vs. Experiences that are MAINLY designed by myself (e.g. to walk around on my own)
2:Do not know
3:Do not want to answer

Questionnaire: Part 1

Q2.7 [flexible scale 1-100]
When you are a city tourist, what kind of experiences do you generally prefer?
1:Experiences that are MAINLY about seeing and looking at something (e.g. a traditional art museum) vs. Experiences that are MAINLY about doing and acting myself (e.g an interactive museum with lots of activities)
2:Do not know
3:Do not want to answer

Q2.8 [flexible scale 1-100]
When you are a city tourist, what kind of experiences do you generally prefer?
1:Experiences that are MAINLY planned and foreseeable (e.g. pre-booked experiences) vs. Experiences that are MAINLY spontaneous and unforeseeable (e.g. to see what happens)
2:Do not know
3:Do not want to answer

Q2.9 [flexible scale 1-100]
When you are a city tourist, what kind of experiences do you generally prefer?
1:Experiences that are MAINLY about being entertained (e.g. an amusement park) vs. Experiences that are MAINLY about exploring (e.g. to go to a local neighbourhood)
2:Do not know
3:Do not want to answer

Q2.10 [multi]
How many of the following specific activities or experiences have you done or will you do while you are in **city**?
1:Visit specific sights and/or attractions, please specify
2:Visit specific museums and/or exhibitions, please specify
3:Eat at specific restaurants, please specify
4:Participate in or watch a specific event, please specify
5:Go to specific streets or squares, please specify
6:Go to a stage performance (concert, musical, opera, theatre etc.), please specify
7:Take a sightseeing tour (walking, bus, boat or similar)
8:Rent/borrow a bike
9:Buy a city card (discounts to attractions, museums etc.)
10:Buy traditional souvenirs
11:Buy a transportation card (free transportation for a number of days)
12:None of these
13:Do not know
14:Do not want to answer

Questionnaire: Part 2

Q3.1 [multi]
How did you decide what to do during your stay in **city**?
1:I walked around the city for inspiration
2:I visited the tourist information office for inspiration
3:I looked in tourist brochures for inspiration
4:I looked in guidebooks for inspiration
5:I followed recommendations from family, friends etc.
6:I asked for recommendations at the place where I stayed
7:I looked through articles I brought with me from home
8:I asked locals for recommendations of what to do
9:I brought printouts from official websites for inspiration
10:I followed recommendations from other tourists found at websites (tripadvisor.com)
11:Other – please specify
12:Don't know
13:Don't want to answer

Q3.2 [multi]
Did you visit any of the following sights, museums and attractions while you were in **city**?
[List of top attractions in each city]

Q3.3 [single]
How satisfied were you with the sights, museums and attractions you visited?
1:Very satisfied
2:Quite satisfied
3:Both satisfied and dissatisfied
4:Somewhat dissatisfied
5:Very dissatisfied
6:Don't know
7:Don't want to answer

Q3.4 [multi grid]
How did your reasons for visiting live up to your expectations?
*[Before/during your stay in **city**, you indicated the following five reasons for visiting the city. The main reasons listed below are based on your answers to the first part of the study.]*
1:History of the city
2:Architecture and design of the city
3:Atmosphere of the city
4:Previous visit
5:To visit people you know
6:Recommendations from family, friends etc.
7:Shopping
8:To eat and drink in restaurants
9:To get to know local people
10:Low cost of transportation to city
11:Low cost of stay in city
12:Night life
13:To relax
14:To spend time with my travel group (family, friends etc.)
15:Specific place of accommodation
16:Specific event
17:Specific attraction
18:Other

1:Much better than expected
2:Better than expected
3:As expected
4:Worse than expected
5:Much worse than expected
6:Don't know
7:Don't want to answer

Questionnaire: Part 2

Q3.5 [multi grid]
How did the activities live up to your expectations?
*[Before/during your stay in **city**, you indicated the following things you were going to do while visiting the city. The activities listed below are based on your answers to the first part of the questionnaire]*
1:I partied and had fun
2:I got to know more about the city and its history
3:I met the local people
4:I saw places and sights that were new, modern and different
5:I visited the city’s historical museums
6:I experienced the cultural life, e.g. theatres and art exhibitions
7:I saw the most famous attractions
8:I did shopping in general
9:I did exclusive shopping (international top brands)
10:I pursued a special hobby/interest
11:I experienced the city’s underground environments
12:I visited some of the city’s in-places
13:I visited some of the attractive restaurants and/or cafés
14:I spent time primarily with friends and/or family
15:I relaxed and recharged my batteries for work later on
16:I experienced some of the less known but exclusive attractions

1:Much better than expected
2:Better than expected
3:As expected
4:Worse than expected
5:Much worse than expected
6:Don’t know
7:Don’t want to answer

Q4.1 [open]
Looking back at your trip/holiday, what were the best and most memorable experiences you had while you were in city?
[Choose anything from your trip/holiday. Your best experience can be anything from sleeping the whole day in the hotel suite to running a marathon, from a particular meeting with some locals to a great museum experience, from a large event like a festival to a ride in a taxi.]

1: Please describe your best experience in no more than 50 words.
2:Don’t know
3:Don’t want to answer

Q4.2 [flexible scale 1-100]
How would you characterise your best experience on the following scale?
*[Please use your mouse to indicate a point on the line which you find appropriate for your best experience in **city]***
1:An experience that was MAINLY designed by others vs. An experience that was MAINLY designed by myself
2:An experience that was MAINLY about seeing and looking at something vs. An experience that was MAINLY about doing and being myself
3:An experience that was MAINLY planned and foreseeable vs. An experience that was MAINLY spontaneous and unforeseeable
4:An experience that was MAINLY about being entertained vs. An experience that was MAINLY about exploring

Questionnaire: Part 2

Q4.3 [multi]
Which of the following statements apply to your best experience?
1:Partying and having fun
2:Getting to know more about the city and its history
3:Getting to meet the local people
4:Seeing places and sights that were new, modern and different
5:Visiting the city's historical museums
6:Experiencing the cultural life, e.g. theatres and art exhibitions
7:Seeing the most famous attractions
8:Shopping in general
9:Exclusive shopping (luxury)
10:Pursuing a special hobby/interest
11:Experiencing the city's underground environments
12:Visiting some of the city's in-places
13:Visiting some of the attractive restaurants and/or cafés
14:Spending time with friends and/or family
15:Relaxing and recharging my batteries for work later on
16:Experiencing some of the less known but exclusive attractions
17:Don't know
18:Don't want to answer

Q4.4 [open]
Looking back at your trip/holiday, what was the worst experience you had while you were in the **city**?
[Choose anything from your trip/holiday. Your worst experience can be anything from sleeping the whole day in the hotel suite to running a marathon, from a particular meeting with some locals to a museum experience, from a large event like a festival to a ride in a taxi.]

1:Please describe your worst experience in no more than 50 words.
2:Don't know
3:Don't want to answer

Q4.5 [multi – flexible scale 1-100]
Before/during your stay in **city**, you had the following idea of what the city would be like. How did you actually find the city to be based on the same attributes?
The crosses on the line indicate your previous answers to the question in part one of the study. If your opinion changed during the rest of your stay/after returning home, please use your mouse to indicate another point on the line which you find appropriate for your final experience of **city** based on the attributes.

1:Romantic (a city that inspires romantic and intimate experiences)
2:Expensive (a city where everything costs a lot)
3:Cultural (a city with a large offering of stage performances, music, museums etc.)
4:Modern (new architecture and design, young, lots of things going on, modern cafés etc.)
5:Charming (a city that you instantly like, a city that is cosy)

Questionnaire: Part 2

6:Historical (a city with many old buildings, statues, monuments etc.)
7:Small (a quiet city that you can see and do in no time etc.)
8:Green (a city with lots of trees, parks, flowers etc.)
9:Unique (a city like no other city)
10:Rich with events (a city with lots of large sporting and cultural events)
11:Clean (a city free of rubbish on the streets, no pollution etc.)

Q4.6 [open]
Why did you find **city** to be less/more [value] than expected?
1:Please describe a story or specific experience that made you change your perception
2:Don't know
3:Don't want to answer

Q4.7 [open]
What would you recommend a family member, friend or colleague to do on their visit to **city?**
[Your recommendation for what to do can be anything from a restaurant, hotel, shop, café or nightclub to an amusement park, a specific street, a park, a beach etc.]
1:Please describe your recommendation (tip/advice) in no more than 50 words.
2:Don't know
3:Don't want to answer

Q4.8 [multi grid]
When you think about your trip/holiday to the city, how would you evaluate the following elements in terms of your satisfaction with your trip/holiday?
1:The city itself (the streets, atmosphere etc.)
2:The place you stayed (hotel, hostel etc.)
3:The sights you visited (statues, monuments, parks etc.)
4:The experiences you paid for (museums, attractions, guided tours etc.)
5:The people you experienced the city with (colleagues, friends, family, new friends etc.)
6:The weather (sun, rain, wind, snow, cold etc.)
7:The people you met (hotel & restaurant staff, local people, taxi drivers etc.)
8:The places you ate (restaurants, shops, cafes etc.)
9:The shops you went to (for clothes, designer stuff etc.)
10:The recommendations you followed (from guidebooks, friends/family etc.)

1:Very satisfied
2:Quite satisfied
3:Both satisfied and dissatisfied
4:Somewhat dissatisfied
5:Very dissatisfied
6:Don't know
7:Don't want to answer

Q4.9 [single]
All things considered, how satisfied were you with your trip/holiday to **city**?
1:Very satisfied
2:Quite satisfied
3:Both satisfied and dissatisfied
4:Somewhat dissatisfied
5:Very dissatisfied
6:Don't know
7:Don't want to answer

Questionnaire: Part 2

Q4.10 [single]
Where do you live in your home country?
1:In the countryside
2:In a smaller city (5,000-50,000 people)
3:In a medium-sized city (50,000-500,000 people)
4:In a large city (+500,000 people)
5:Don't know
6:Don't want to answer

Q4.11 [single]
What is your level of education?
1:Lower than high school (secondary school)
2:High school (secondary school)
3:Vocational education (technical school)
4:Further education (Bachelor or other degree)
5:Higher education (Master's, Ph.D. or other degree)
6:Don't know
7:Don't want to answer

Q4.12 [single]
Was **city** your primary destination on your trip/holiday?
1:Yes
2:No
3:Don't know
4:Don't want to answer

Q4.13 [single]
How many times have you been on a leisure trip/holiday to city?
1:This was my first time
2:Two times
3:Three times
4:Four times
5:Five times or more
6:Don't know
7:Don't want to answer

Q4.14 [single]
How many times have you been on a trip/holiday to a European city in the past eighteen months (2006 and 2007)?
1:This was my first time
2:2 times
3:3 times
4:4 times
5:5 times
6:6 times or more
7:Don't know
8:Don't want to answer

Q4.15 [multi]
What was your main form(s) of transport to the city?
1:Private car/van
2:Hired car/van
3:Train
4:Plane
5:Boat/ferry
6:Bus
7:Other, please specify
8:Don't know
9:Don't want to answer

Appendix 2:
The attractions the tourists visited

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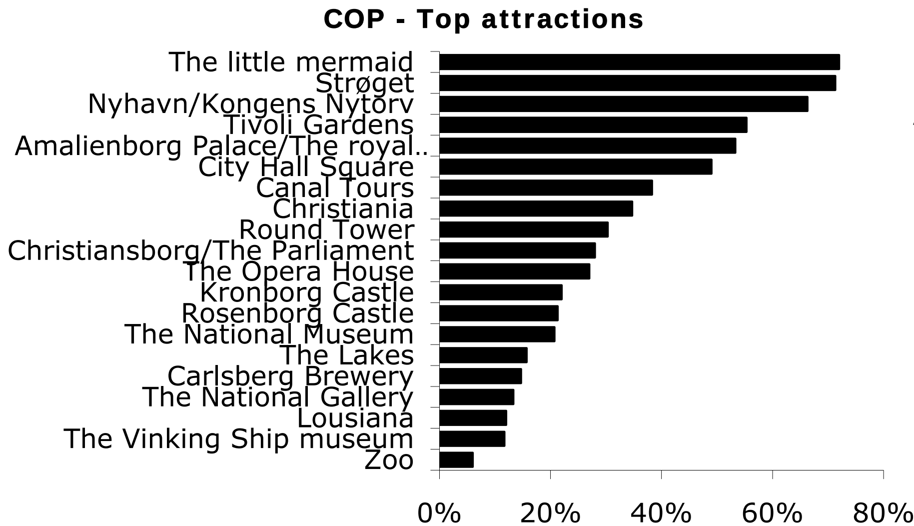
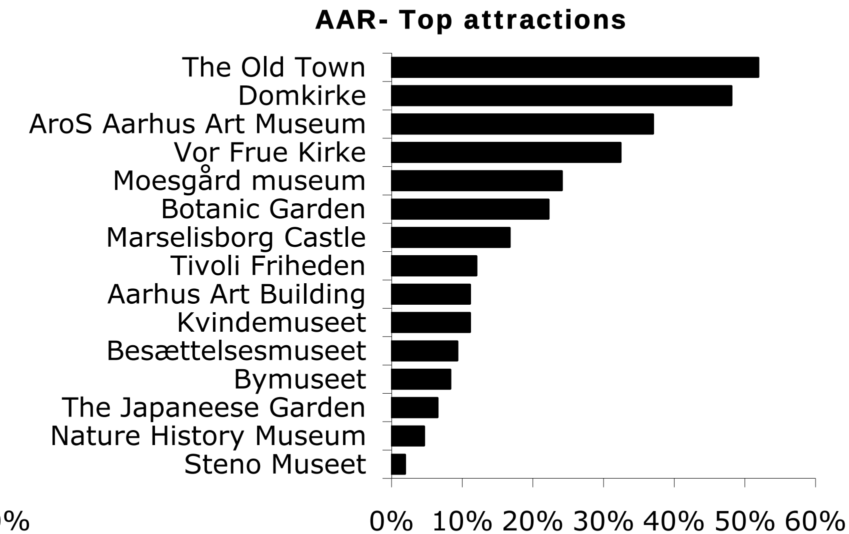
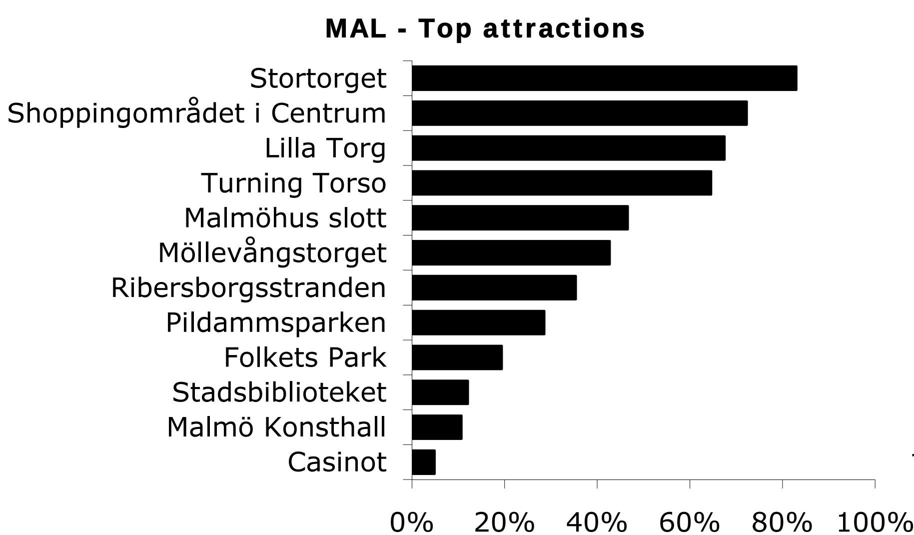
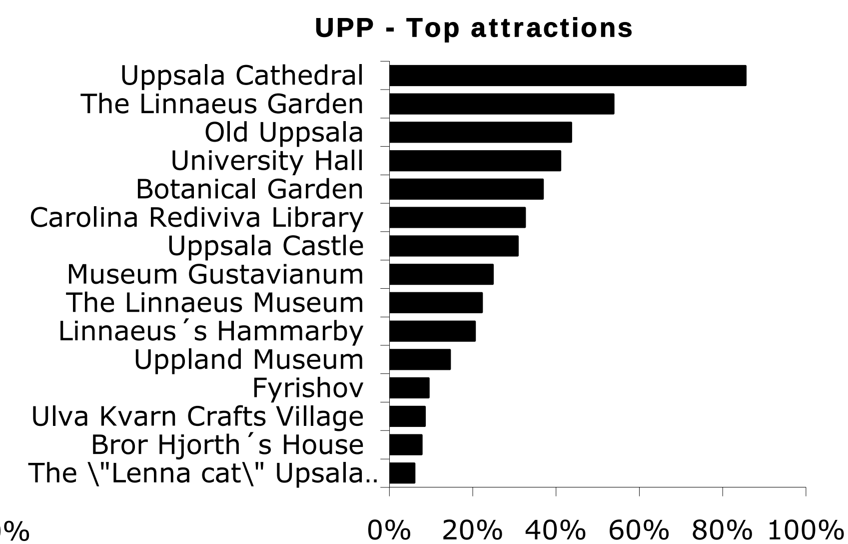
The attractions the tourists visited

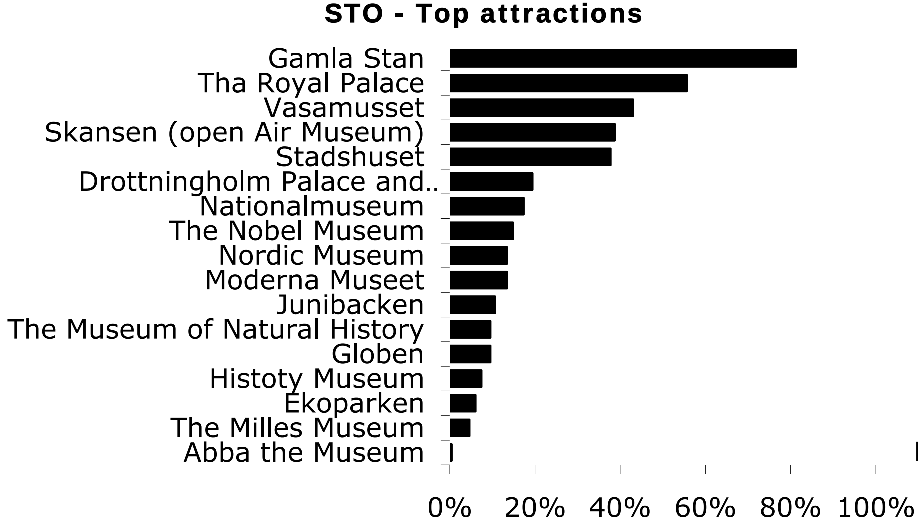


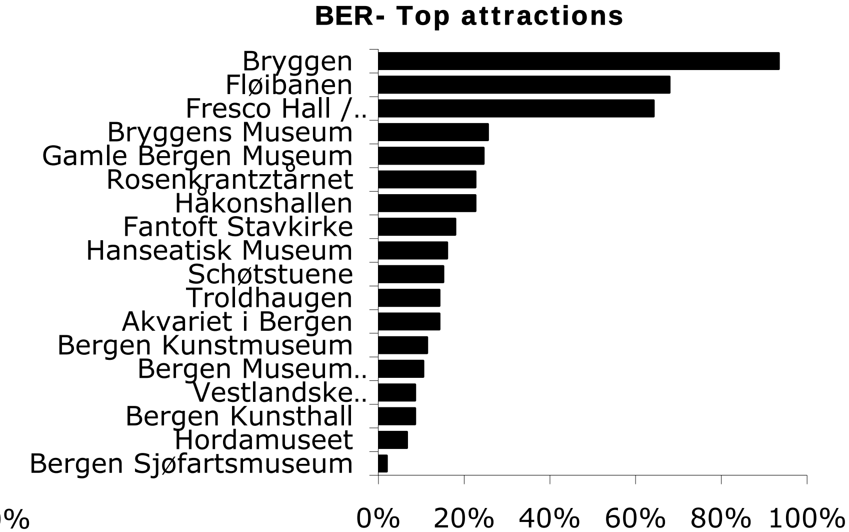


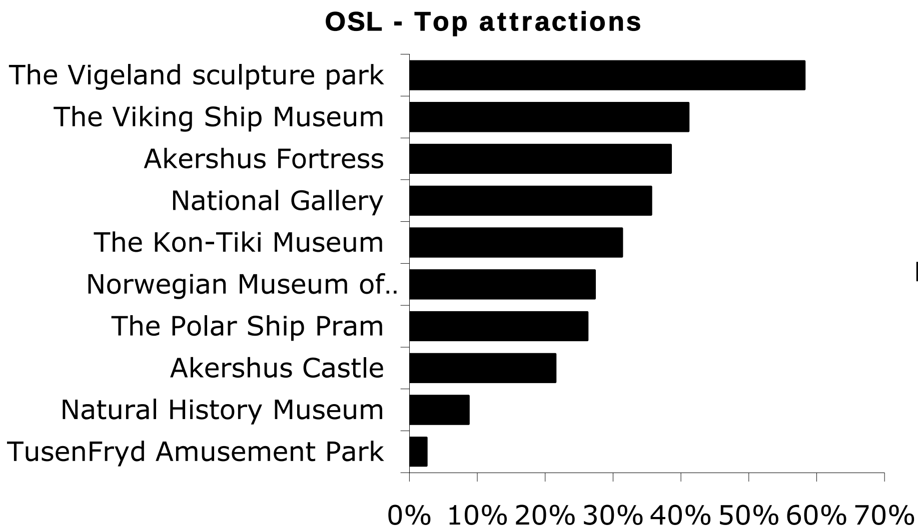


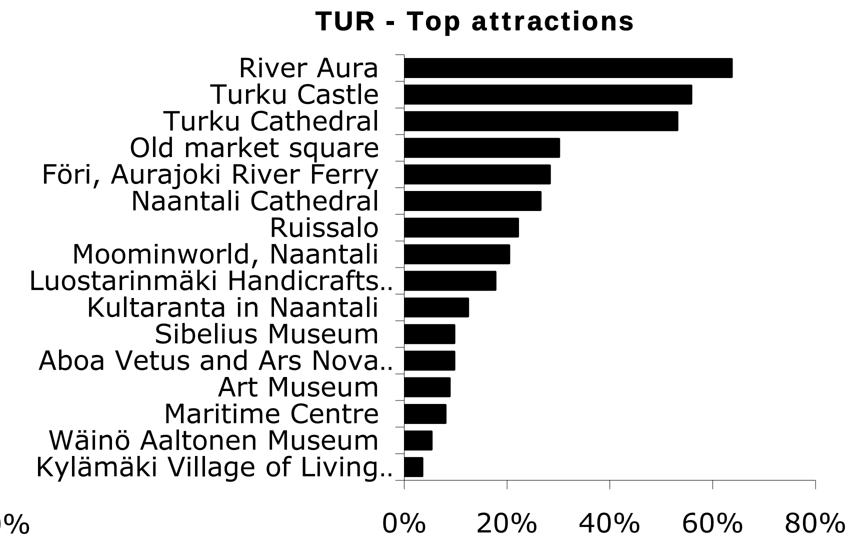


The attractions the tourists visited

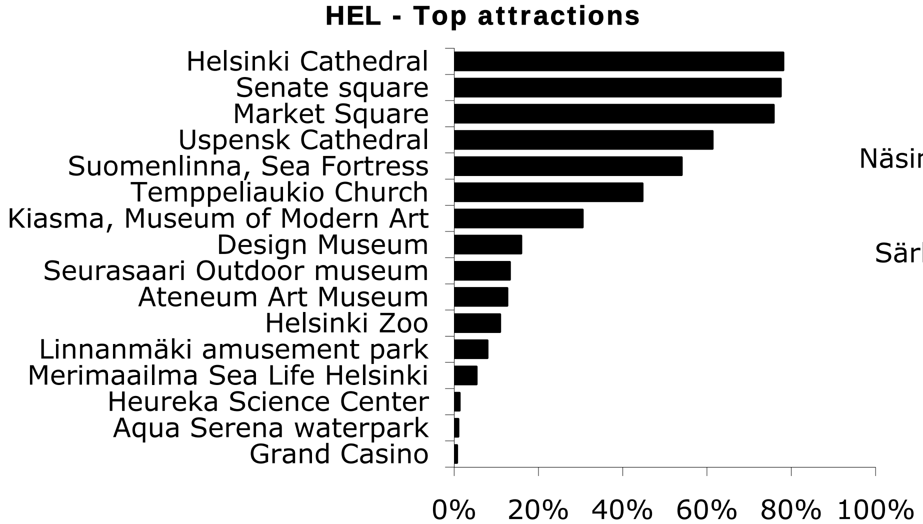


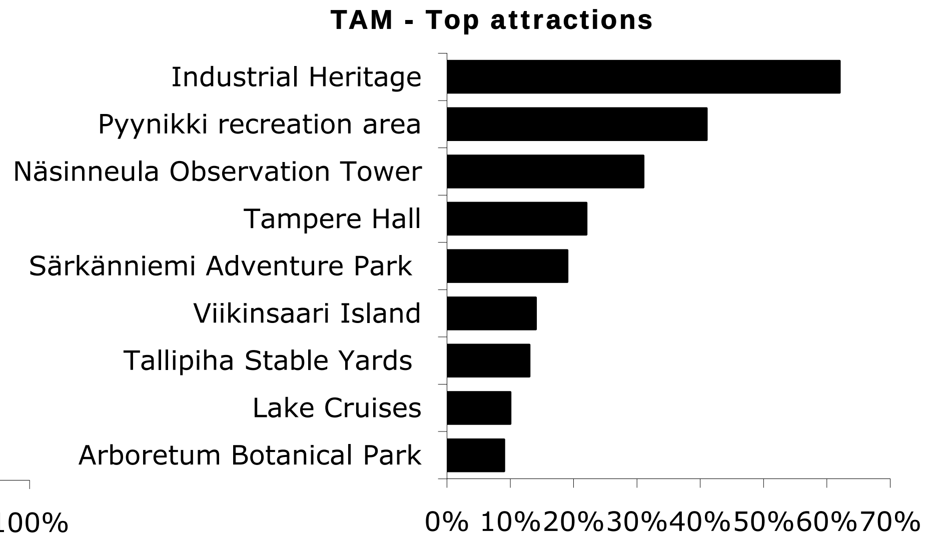


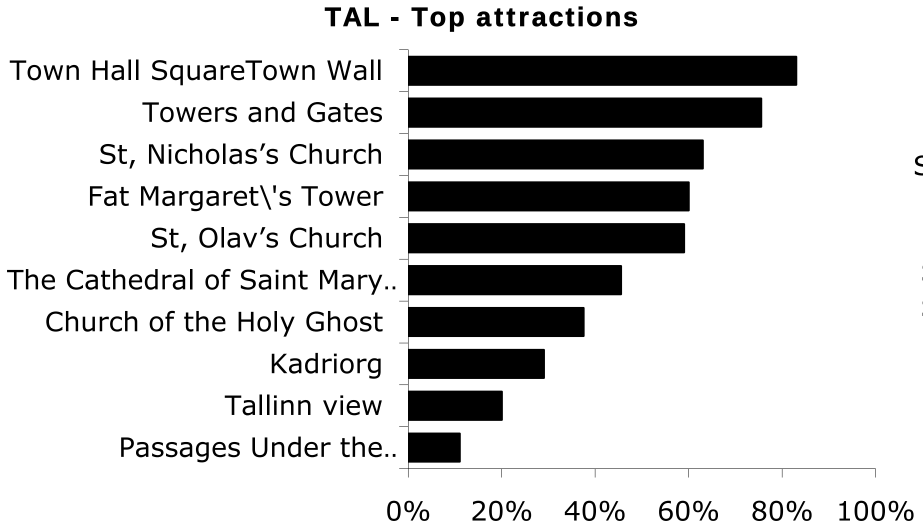


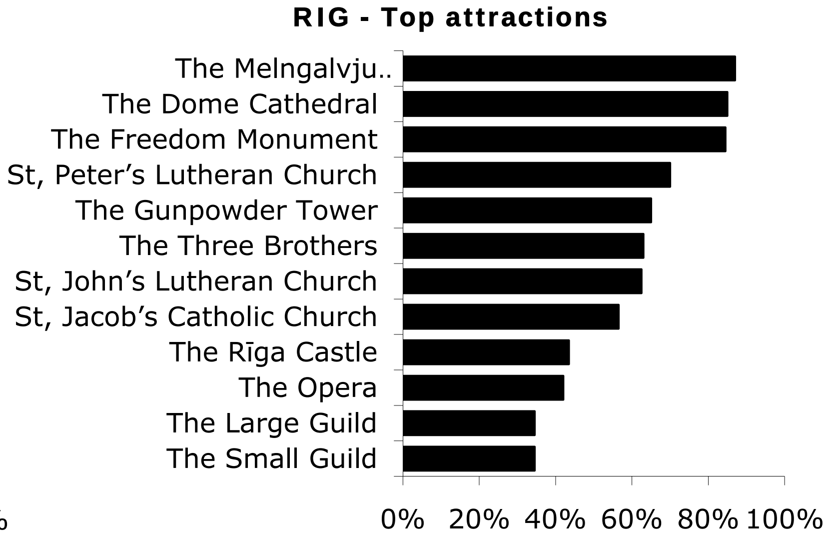


The attractions the tourists visited

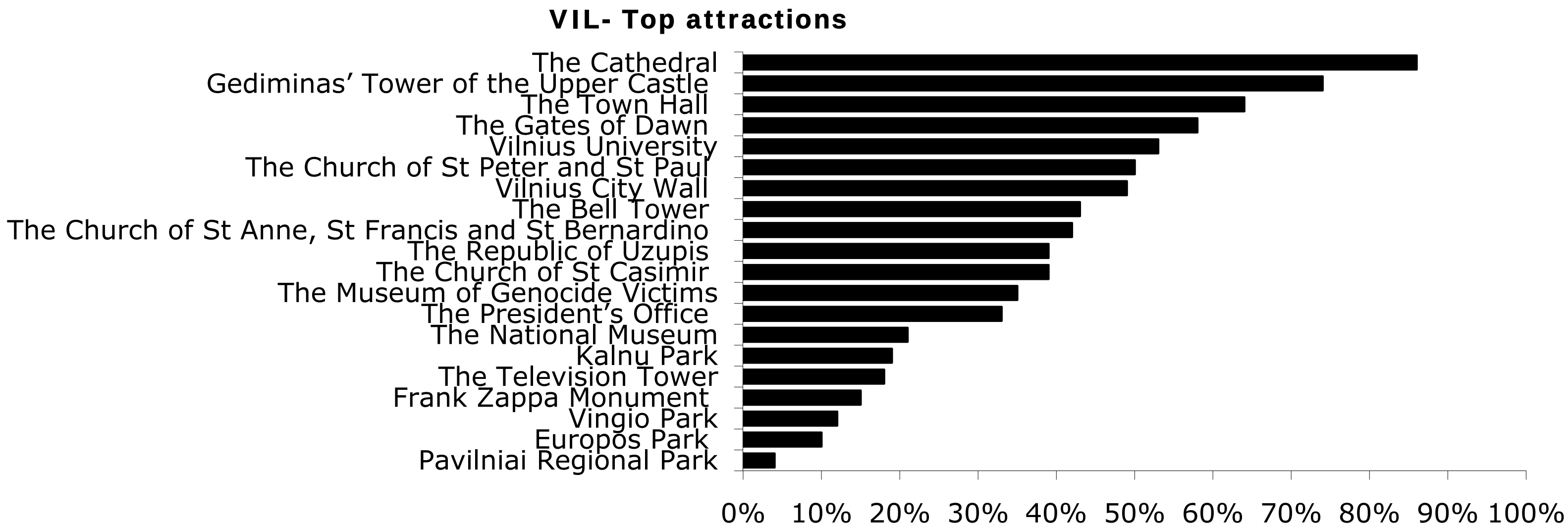


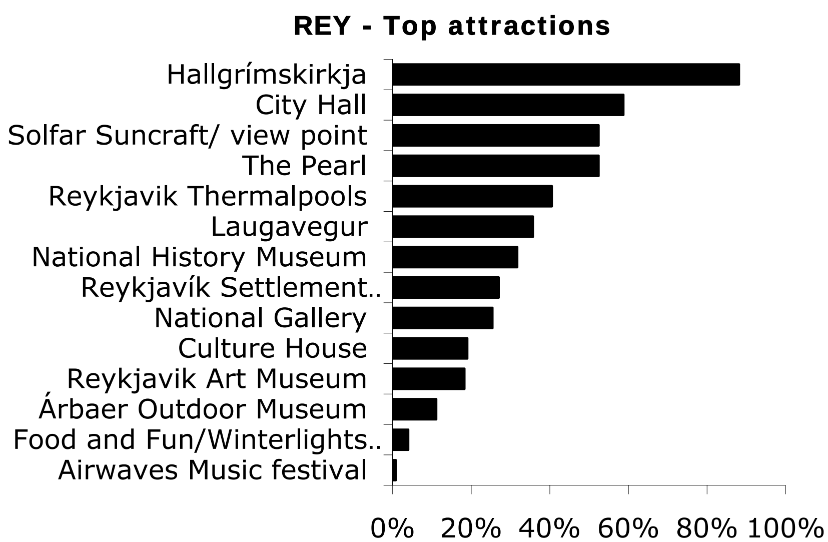






The attractions the tourists visited





Appendix 3:
Press coverage on "Copenhagen is filthy"

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Press coverage on “Copenhagen is filthy’

Wonderful Copenhagen decided to test the potential for press coverage of the project’s many results in November 2007. For some time, there has been a public debate concerning the fact that the streets of Copenhagen are rather packed with garbage. Data from the survey actually confirmed this statement and to put some facts into the public debate, Wonderful Copenhagen sent out the following press release (translated from the Danish version).

Copenhagen is a filthy experience, say tourists

Tourists in Copenhagen perceive the city filthier compared to the tourists’ experiences in the other 13 Nordic and Baltic cities in the survey.

A large tourist-survey says that Copenhagen has the lowest score on an experience parameter according to be a clean city. Compared to the other cities in the survey Copenhagen gets the lowest placement.

On a scale from 0 to 100 (where 0 means that the city is not clean (filthy) and 100 means that the city is very clean), the tourists in Copenhagen give the city a score on 60. This score is lower than all the other 13 cities and also lower that the average on 69. The tourists perceive Reykjavik as the cleanest city, with a score on 78.

If you ask the tourists after the vacation, where there has been time to reflect the experiences, the tendency is unmistakable. As the only city amongst the 14 cities, the tourists give Copenhagen a lower score after the vacation than during the vacation with an average on 59.

This signal says that the tourists experience Copenhagen filthier than they had expected before the journey. The other 13 cities in the survey all get a little higher score after the vacation than under the vacation – the average increase a modest from 69 to 70. For all other cities the signal is that they experienced these cities a little cleaner than expected in advance.

Press coverage and effect

This press release with one simple message got a lot of press coverage. During November and December, the press release got a lot of coverage in national media.

All national newspapers brought longer articles on the issue, interviewing relevant actors in the municipality, Wonderful Copenhagen, locals and tourists, and bringing pictures from the dirtiest places of Copenhagen.

The largest Danish TV station in terms of viewers, TV2, did a series of news features in primetime. They encouraged viewers to send in photos of dirty streets. They also went to Reykjavik, since the tourists in the survey regarded this city most clean.

Many regional newspapers brought articles on this issue, including newspapers in the region of Aarhus, in view of the fact that Aarhus was also ranked in the bottom.

Perspectives

The press coverage has been used constructively in both Copenhagen and Aarhus, where the cities are now working to improve the cleanliness of the city benefitting locals and tourists alike. To sum up, the value of the benchmark possibility proved its worth in this case and will hopefully prove its worth in the time to come.

Appendix 4:
How to read the tables and diagrams

How to read the tables and diagrams

The many tables and diagrams in the report are described in terms of how the reader should understand, read and interpret the more difficult tables and diagrams in the report.

Demography

Page 24-27: The diagrams show the share of all tourists in all cities having ticked each of the specific answer possibilities listed in the diagrams. The scale is a percent scale.

Page 28-31: The tables show the share of tourists divided by city that ticked each of the specific answer possibilities. The scale is a percent scale.

City rankings

Page 33, 38, 42, 46, 49: The diagrams show the share of all tourists in all cities having ticked each of the specific answer possibilities listed in the diagrams. The scale is a percent scale.

Page 34-37, 39-41, 43-45, 47-48, 50: The tables show the share of tourists divided by city that ticked each of the specific answer possibilities listed above the tables. The scale is a percent scale.

Page 51: The diagram shows the satisfaction of all tourists in all cities with the specific answer possibilities listed in the diagram. The scale is from -2 (very dissatisfied) to +2 (very satisfied).

Page 52-55: The tables show the satisfaction of all tourists divided by city with the specific answer possibilities listed above the tables. The scale is from -2 (very dissatisfied) to +2 (very satisfied).

Page 56: The diagram shows to what extent all tourists in all cities value the cities on specific parameters listed in the diagram. The scale is from 1 (the value fits the city to a low degree) to 100 (the value fits the city to a high degree).

Page 57-59: The tables show to what extent all tourists divided by city value the cities on specific parameters listed in the diagram. The scale is from 1 (the value fits the city to a low degree) to 100 (the value fits the city to a high degree).

Page 61: The diagrams show two things. The X-axis shows the percentage of all tourists in all cities that indicated the specific answer possibilities as one of their reasons or motivations for going to the specific city. The Y-axis show the average level of expectations being fulfilled (based on the 2.516 tourists who answered part II of the questionnaire) on a scale from –2 (much worse than expected) to +2 (much better than expected).

Page 62-75: The diagrams show two things. The X-axis shows the percentage of tourists divided by city that indicated the specific answer possibility as one of their reasons to go or motivations to experience for the specific city. The Y-axis show the average level of expectations being fulfilled (based on the 2.516 tourists divided by city who answered part II of the questionnaire) on a scale from –2 (much worse than expected) to +2 (much better than expected).

Segments

Page 81-87, 97-99: The diagrams shows to what extent all tourists divided by segments have answered to different answer possibilities and parameters listed in the diagram.

Page 88, 96, 108: The diagrams shows the distribution of segments divided by city.

norden

Nordic Innovation Centre

Nordic Innovation Centre

The Nordic Innovation Centre initiates and finances activities that enhance innovation collaboration and develop and maintain a smoothly functioning market in the Nordic region.

The Centre works primarily with small and medium-sized companies (SMEs) in the Nordic countries. Other important partners are those most closely involved with innovation and market surveillance, such as industrial organisations and interest groups, research institutions and public authorities.

The Nordic Innovation Centre is an institution under the Nordic Council of Ministers. Its secretariat is in Oslo.

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