

THE END
OF
TOURISM
AS WE KNOW IT

TOWARDS A NEW BEGINNING OF
LOCALHOOD



STRATEGY 2020

THE KING IS DEAD!

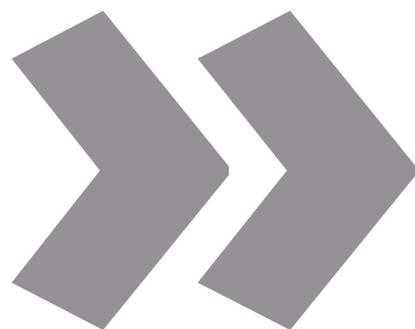
WONDERFUL COPENHAGEN CONCLUDES THE END OF THE ERA OF TOURISM, AS WE KNOW IT.

We pay our respects to the tourists of the past, the mass consumers and the passing days of disconnected tourist segmentation between business and leisure, city and countryside, culture and cycling.

We bid farewell to an era of tourism as an isolated industry bubble of culture and leisure experts.

We leave behind days of equating tourism marketing with glossy picture-perfect advertising.

We recognize the expiration of our role as the destination's promotional superstar, the official Destination *Marketing* Organization (DMO) with authoritative consumer influence, broadcasting superiority and an exclusive right to promote and shape a destination.



LONG LIVE THE KING!

AS WE LEAVE BEHIND THE ERA OF TOURISM, WE EMBARK ON A NEW BEGINNING, TOWARDS 2020 AND BEYOND.

We greet a new era in which the travel industry and visitor economy globally claim their rightful seat as one of the fastest growing sectors in the world, with 3.9% growth per annum over the next 10 years.

We welcome the arrival of today's traveller: the temporary local seeking not the perfect still picture to take home, but the emotional connection to an instantly shared experience based on interests, relations and authenticity.

We in Wonderful Copenhagen refocus on our industry as one of societal impact and value, of big business, of growth and influence on almost every other industry.

We embrace our partners among the established industry, the many and mostly tech-driven newcomers, universities and researchers, students, travellers and the local citizens. We dedicate ourselves to promoting cross-industry innovation and insist on having the nerve to disrupt and encourage the disruption of that which needs to change.

As an official Destination *Management* Organization (DMO), our official destination recommendations are no longer sought after. Rather than promoting to others, we need to promote through others. We anticipate a task that we will share with many, in which we will take lead on developing and managing the destination by enabling others to build experiences based on that one thing that sets us apart and yet pulls us together: our shared sense of localhood.

We embark upon an era in which the advocacy of our locals is crucial to delivering the destination experience in demand, an era in which that advocacy, in turn, depends on the value added by our visitors.

With the launch of our 2020 strategy, we set our course towards a future beyond tourism with something much more interesting and personal: a future of hosts and guests and the shared experience of localhood. In a time of change and transition, this strategy sets out an ambitious course, not a definitive solution.

We will seek out solutions in collaboration with our current and new partners, working to attract more business to the Greater Copenhagen metropolitan region and generating more value from the business attracted. We will enable more people to engage in the conversation about Copenhagen and develop the right experiences to tell the right stories. Based on updated insights and feedback, we will continuously challenge our approach, results and our agility to adapt.

We are embarking on this journey with the shared ambition of co-creating sustainable and long-term value for our destination together with our partners and our locals - both the temporary and the permanent ones.

Mikkel Aarø-Hansen
CEO, Wonderful Copenhagen

8 ROAD SIGNS TO A NEW BEGINNING

Leading up to our conclusion that the End of Tourism is upon us, we have identified eight key movements that we believe point out the necessary direction towards a shift from tourism to a new era for the travel industry and visitor economy. These movements outline the big picture, not the actual steps ahead for our destination or organization. Yet this is where it starts – both the end of tourism and the new beginning for which we will need to adapt to ensure the competitiveness and appeal of our destination and organization. The biggest threat to the DMO today is not the end of tourism, but rather our resistance to change along with it.

1. The experience of temporary localhood. Today, fewer and fewer want to be identified as tourists. Instead, new generations of travellers seek out experiences that not only provide a photo opportunity, but also get their hands ‘dirty’ and immerse them in the destination. The travellers seek out a sense of localhood, looking to experience the true and authentic destination – that which makes a destination unique. With the increasing number of providers and businesses that tap into the sharing and collaborative business potential, travellers gain increasing access to the local travel experience.

2. Locals are the destination. Locals are not a nice little sideshow, but, rather, one of the major attractions of a destination. The Little Mermaid offers no emotional or personal connection to the destination, the locals do. The delivery of an authentic destination experience depends upon the support of locals, whereas the liveability and appeal of our destination - and thereby the advocacy of locals - depends on our ability to ensure a harmonious interaction between visitors and locals.

3. Branding is all about relations. Marketing no longer leads us to the brand: the relationships we have with other people do. Today, with the proliferation of social media, information is created by everyone and available to everyone. Travellers look to peer recommendations from family, friends and their social circles – much like they always have, but today the scale of connectivity between people has taken on entirely new dimensions, making recommendations and the conversations they entail much more important

to destination branding than ever before. The destination no longer broadcasts a general brand message to many, but instead enables personal brand stories to be told through the right people to a broader circle of people.

4. From marketing to enabling. The role of the DMO is changing. With the end of tourism, we also mark the end of marketing as we know it and a shift in the role of the DMO. As travellers are seeking out the experiences of temporary localhood, the official destination’s version of a destination is in many cases no longer the most sought after. Rather, the DMO’s role is shifting towards developing and spotlighting the right kind of experiences and engaging the right people at the right time to tell the right stories about the destination based on a shared strategic branding framework.

5. A traveller is all kinds of human. Always online and connected with his or her social circles, today’s travellers are flexible to change between different models of travel and life. Differentiating between business and leisure, segmenting based solely on demographics or geographics ignores the fifty shades of human that every traveller represents: the foodie business traveller, the millennial cruise passenger or the outdoorsy Chinese fashionista on a biking holiday. Today, communities develop across borders that share something other than nationality or generation. Instead, we need to see the Airbus 380 with 615 passengers as a large group of individuals or microsegments, each with his or her own motivations, culture and way of relating to others.

6. Global urban travellers. The majority of people live in urban areas today, and 80% of global GDP is generated in cities. By 2050, the urban population will most likely account for 70% of the world's population and cities in today's developing world will represent 95% of this global urban growth. This carries enormous potential for wealth creation and an increase in urban travel from an expanding middle class, not least from large countries like China and India. Meanwhile, this global development puts heavy pressure on the cities, and DMOs will need to take on a collaborative role in ensuring that visitor growth does not come at the expense of the destination's local quality and liveability.

7. Digital is yesterday's question; new data is today's. Digital or not is no longer a question. Whether for marketing, communication or data purposes, the Destination Management Organization of today and tomorrow is digital throughout all aspects of managing the destination and the organization behind it. As a consequence of digitalization, everyone and everything today generates new data. Popular methods of data collection are reinforced by the access to digital data, unaffected by human error or belated response rates. Through passive measurement, the use of digital big data can provide accurate - often real-time - depictions of actual visitor behaviour, tourism trends and new business potential.

8. Agility to change and fail fast. In today's digital economy, the players – big and small – have access to enter the market, making innovation an increasingly open process between many different participants across industries, e.g. travel and tech, travel and urban planning, travel and data analytics. The DMO of tomorrow will need to find its place in that cross-section of innovation while also balancing its close link to the public sector. In a data-driven, experience-driven world, a DMO's KPIs need to be adapted beyond bed-nights, but extend to the broader value creation within the visitor economy.

The **8 road signs** are trends determined from extensive reading, participation in international conferences and internal discussions. Below are selected key sources only:

- PwC, Global Entertainment and Media Outlook 2016 – 2020.
- European Parliamentary Research Service, Global Trendometer: Essays on medium- and long-term global trends, 2016.
- European Strategy and Policy Analysis System, Shaping the Future, 2016.
- OECD, Tourism Trends and Policies 2016.
- Airbus, Global Market Forecast 2016-2035.
- Harvard Business Review, Labels like “Millennial” and “Boomer” Are Obsolete, Nov 2016.
- SKIFT, The Megatrends Defining Travel in 2016.
- SKIFT, The Traveler Manifesto – What Super Travelers Want From the Travel Industry, 2016.
- Destination Think! Insights & News.

A STRONG STARTING POINT FOR A NEW BEGINNING

Rest assured, the End of Tourism does not mean we have to start all over. The End of Tourism means a noticeable shift in the traveller mindset, the technology and the industry players enabling it. It means a shift we need to adapt to, building on our strong starting point for Copenhagen and Greater Copenhagen. The following section outlines that starting point, which represents the baggage we carry with us into the new era of experience.

OUR CORE BUSINESS IS STILL TRAVELLERS

The End of Tourism marks a shift in our approach to travellers across all areas of business within our organization. However, travellers remain the core business of Wonderful Copenhagen.

We will continue and strengthen our efforts to attract new business to our destination, whether through bidding for large conventions, meetings and events, initiating access to new business opportunities for our cruise network partners, or attracting new airlines to bring more passengers to our destination.

The shift lies in our renewed focus on visitor management and enabling the shareable experience with and through our partners.

Through visitor management, our commitment will be to make more from the business attracted, develop the right experiences to increase satisfaction, encourage our visitors to share their positive experience and lead more along the path to final purchase. This shift is also reflected in the new strategies of our networks.

The **Copenhagen Cruise Network** strategy for 2016–2018 introduced a renewed focus on the destination experience, whereas the new **Meetingplace** strategy for 2017–2020 presents a focus on community engagement, the integration of a delegate and lei-

sure perspective with the business event destination brand, and a commitment to enable members to engage more with the destination brand.

OUR CORE PRODUCT AND ASSET IS PEOPLE

As an organization, Wonderful Copenhagen is driven by people with strong professional will to create the best possible results for and through our partners. We are eager to challenge the present, think in new directions and pursue our goals without fear of failing or taking the path less explored.

The main attraction of our destination is the locals. The human connection to a destination goes through the local people and the experience of being part – even if only temporarily – of a shared sense of localhood.

The championship and advocacy of our locals throughout the entire metropolitan region is crucial to our ability to stand out as a unique and local destination with global appeal. Much like the team behind Wonderful Copenhagen take pride in their core product, the pride of our locals is critical for the equation to balance: our locals need to be so proud of their hometown that they want to share it even more.

OUR CORE BRAND STORIES ARE STRONGER THAN EVER

The core brand stories of Copenhagen have developed over the years under the influence of many. The stories bring people together within a framework defined by local character and personality, global relevance, inclusiveness and invitation.

The core stories bring together numerous stakeholders and partners within the capital city and in association with it. The development of the Greater Copen-

hagen cooperation underlines the inclusive appeal of Copenhagen as a brand that rests on a shared sense of culture and belonging.

Today the storytelling framework consists of five strategic core stories that collectively capture the compelling brand essence and unique cultural character of our destination:

Design and architecture. From old cobbled streets to defining furniture designs, experimental public spaces and globally renowned modern architecture, Greater Copenhagen presents a unique experience of livable design.

Gastronomy. The birthplace of New Nordic cuisine, Copenhagen is one the world's true gastronomic hot-spots and creative playgrounds ranging from NOMA to local rooftop earth-to-table flavours.

Sustainability. From drinkable tap water to a strong local biking culture, popular public harbour pools and a political ambition to become the world's first CO2 neutral city in the world by 2025. In Copenhagen - and in the entire country - sustainability is not just something we say: it's something we live and share.

A pocket-sized fairy tale. A modern royal family and one of the world's oldest monarchies, stunning castles and a proud fairytale tradition keep the history and cultural heritage of Greater Copenhagen forever alive.

Tolerance and diversity. With open street parties for everyone, the locals of our destination are proud of the safe, open and tolerant approach to love and to people of all shapes and sizes.

Our core brand stories are constantly developed and re-defined, with an outside-in approach to reflect the essence embraced by our visitors and locals alike.

OUR CONTRIBUTION TO THE NATIONAL TOURISM STRATEGY TOWARDS 2025

The new national tourism strategy for Denmark (2015-2025) outlines shared targets for the Danish travel industry and visitor economy as a whole.

As the official DMO of the Capital Region of Denmark, Wonderful Copenhagen represents the key regional visitor growth driver of our country and is working to realize the Regional Growth and Development Strategy.

Furthermore, Wonderful Copenhagen is entrusted with the responsibility of managing two of three cross-national tourism development entities: Danish Urban Tourism (Dansk Storbyturisme) and Danish Business Tourism (MeetDenmark). These national responsibilities are not new to Wonderful Copenhagen, as we already manage the national networks and programmes of Copenhagen Cruise Network and the air route development programme Global Connected.

The 2020 strategy of Wonderful Copenhagen supports our cross-national roles and will contribute to the achievement of the national targets through the directions and actions set out in this document and through a strong will to find common solutions across country, regions and responsibilities.

NATIONAL TOURISM STRATEGY TARGETS:

GROWTH IN TOURISM BED-NIGHTS BY 1/3, EQUIVALENT TO 17,000,000 BED-NIGHTS

GROWTH IN TOURISM REVENUE BY DKK 45,000,000,000 TO REACH A TOTAL OF DKK 140,000,000,000

INTERNATIONAL VISITOR SATISFACTION LEVELS WITH DENMARK EQUIVALENT TO THE AVERAGE SATISFACTION LEVELS WITH NORTHERN EUROPE.

OUR SHARED AMBITION FOR GREATER COPENHAGEN

Greater Copenhagen aims to be the leading metropolis in northern Europe in terms of attracting and retaining international investment, tourism and talent.

By 2020, the Greater Copenhagen collaboration is envisioned to have created significant growth and jobs across the metropolis.

In 2016, the DMOs of Greater Copenhagen have identified a shared ambition to make the destination

Greater Copenhagen stand out in Europe as the **perfect match between city and countryside**, lifting the metropolis into a new and bigger league of European metropolitan regions.

With our new 2020 strategy, Wonderful Copenhagen takes a leading role in realizing the shared ambition for Greater Copenhagen. Through our new vision and strategy, we take responsibility in shaping a stronger future, based on a shared sense of localhood across regional borders and individual destinations.

OUR STARTING POINT IN KEY NUMBERS

BED-NIGHTS IN COPENHAGEN CAPITAL REGION (EST. 2016):	+10 MILLION
GROWTH IN BED-NIGHTS TO THE CAPITAL REGION (EST. 2016):	3.5%
TOURISM REVENUE IN COPENHAGEN CAPITAL REGION (EST. 2016):	+40 BILLION
PERCENTAGE OF TOTAL TOURISM REVENUE IN DENMARK (2014):	40%
FULL-TIME JOBS CREATED IN THE CAPITAL REGION (EST. 2016):	+48,000

OUR VISION

Our new vision is not only a four-year perspective: it is a vision that supports our development of the future destination beyond 2020 that we wish to co-create.

A future destination where human relations are the focal point, where the differentiation between destination and home of locals is one and the same. A destination, where locals and visitors not only co-exist, but interact around shared experiences of localhood.

A destination where our global competitiveness is underpinned by our very own localhood: that which makes us stand out on an international scene of global brands and big players, where we connect at scale by creating meaningful relationships with people – our potential temporary locals.

A future, where tourism growth is co-created responsibly across industries with the destination's sustainable development and the locals' wellbeing at heart.

Our vision calls for our shared identity across the metropolitan region of Greater Copenhagen, where achieving our ambition of the perfect match between urban and countryside relies heavily on our shared sense of localhood.

To co-create this future of growth, where the right kind of growth benefits more people and more businesses, our vision is a destination, where tourism is considered an inclusive, comprehensive challenge and an open opportunity shared by many – across borders and businesses. Where our destination invites more people – here and abroad – to take part and be part of our destination.

In short, our vision is...

LOCALHOOD FOR EVERYONE



OUR MISSION

As the official destination management organization (DMO) of the Copenhagen Capital Region, Wonderful Copenhagen is tasked with promoting and developing business and leisure travel to the Copenhagen Capital Region for the common good.

Wonderful Copenhagen also fills multiple roles at international, national and cross-regional levels with numerous stakeholder interests to satisfy. These roles include responsibility for two of three national tourism development companies, secretariat of national and international cruise networks, secretariat for the national route development programme and as one of the key partners in developing the cooperation between the destinations of Greater Copenhagen.

Forming the foundation of the work of Wonderful Copenhagen is the unique brand essence of Copenhagen – an encompassing brand that is not confined to the regional geography of the capital region, but, rather, is to be shared by a broader geography and range of players. Shared within the metropolitan region of Greater Copenhagen, across the national tourism agenda, across industries and – most importantly – as shared by and between locals and travellers.

Before, the supply of information was limited and managed by a limited number of broadcasters. Today, information is created by everyone and is openly and

freely available anytime and anywhere. Wonderful Copenhagen need to move beyond pure broadcasting and promotion of our destination to consumers. Instead, our focus will be on developing and spot-lighting the experiences that capture the authenticity of our destination, and then promote these experiences as part of our core brand stories through others, encouraging and enabling more people to tell the positive stories of the destination.

Working towards a new beginning, our mission is to strengthen the role of Wonderful Copenhagen as developer of our destination's experience of localhood: that which sets us apart and encourages more people to share and recommend us to others. We will focus on our role as professional enablers of a conversation about our destination and as facilitators of a strong and compelling brand essence.

We will develop our role as an incubator of change and accelerator of co-innovation, as a promoter of shared interests across relations, industries and geographies, and as an organization that takes responsibility in enabling localhood for everyone.

Wonderful Copenhagen will...

***ENABLE OUR DESTINATION
TO BE SHARED MORE***



The five strategic coordinates of our new strategy will work as our GPS coordinates to keep us on course in a time of change and transition.

We are long past the days of writing a set four-year strategy as a fixed plan for the coming years. Instead, our new strategy provides a dynamic direction towards not only 2020, but also 2025 and even 2030.

We need to keep ourselves in check: are we moving in the right direction? Have circumstances changed that

make adaptation necessary? Are we creating relevant value and benefit for our partners, visitors and locals? In a time of fast-paced change, our strategy sets out an ideal course, yet leaves room to define our means of getting there, the necessary detours and the nature of the end destination, which will constantly need to be challenged.

- 1. SHAREABILITY IS KING**
- 2. ONCE ATTRACTED, TWICE VALUED**
- 3. TOMORROW'S BUSINESS TODAY**
- 4. CO-INNOVATION AT HEART**
- 5. PEOPLE-BASED GROWTH**

SHAREABILITY IS KING



With the proliferation of social media, information is now created by anyone and made available to everyone. Travellers look to peer recommendations from family, friends and their social circles – much like they always have, but today the scale of connectivity between people has taken on entirely new dimensions through digital social platforms, making word-of-mouth recommendations and the conversations they entail much more important to destination branding than ever before. Today, we as a DMO need to enable the relevant conversation through shareable destination moments and experiences, adding value through others to create a personal relationship with the brand essence – the localhood – of our destination.

This means we **will**

- **Develop business intelligence to optimize community embracement of brand essence.** We will deliver data insights on the sentiments of our visitors and the nature and quality of their engagement with the destination brand, including the initiation of new partnerships to boost our strategic use of data from digital platforms to optimize the reach of the conversation and community embracement of the brand core stories.
- **Enable partners to develop shareable moments.** We will enable our partners to develop and promote relevant experiences that lead to positive experiences for our visitors and generate shareable moments within our strategic brand framework: a framework that works within our own arena and as part of the inspirational universe of our partners, locals and travellers alike.
- **Lead and encourage a 365-days-a-year storytelling.** We will add value to the conversation about our destination by creating an emotional connection to our brand through content. We will focus our efforts on developing, sharing and encouraging content that matters and strengthens the human connection to our brand.
- **Enable the right people to share the right experiences.** We will work with the right people to reflect our brand core and lead more people along the path to purchase.

This means we **will not**

- **Insist on putting our logo** or even our official mark on everything.
- **Go big and generic**, but targeted in our brand messaging and marketing.
- **Engage in storytelling** that does not match our strategic brand framework.
- **Stay within our own arena** or wait for others to join us there. Traffic is not a goal in itself: relevant conversation and engagement is.

We **succeed** when

- **The story works!** When people interact with the brand message and engage in the conversation about our destination, leading them to the path to purchase.
- **Our partners succeed!** When our partners are able to create value from our shared branding framework to gain more business, the entire destination wins.



OUR TEAM'S PERSPECTIVE

"I share personal content of local peculiarities, special spots of beauty and unknowns to promote Copenhagen through my Instagram followers."

(Thomas, Wonderful Copenhagen).

2017 ACTIVITIES

- **Develop a 365-days-a-year brand strategy** to share with partners and enable the right people to share the right experiences.
- **Deliver data insights to qualify the selection** of the right people and the right experiences to manifest our shared brand essence.
- **Discontinue the existing City Break Network** in order to refocus on enabling partners to execute targeted marketing within our shared branding framework.

OUR STAKEHOLDERS' PERSPECTIVE

Key results of Wonderful Copenhagen's 2016 Stakeholder Survey

Not just a promotional superstar!

Our stakeholders support a strengthened role for Wonderful Copenhagen in facilitating multiple promoters and advocates of our shared destination.

Don't leave us!

Our stakeholders are hesitant to see Wonderful Copenhagen in a purely enabling role. We need to clearly communicate our role in enabling and leading the conversation towards the path to purchase, demonstrating best practice and the results generated.

ONCE ATTRACTED, TWICE VALUED



Previously, as Destination *Marketing* Organization, the primary focus has long been on attracting more visitors. New digital sources of data allow us to move closer to visitors and engage beyond the initial attraction. Through updated insights of visitors' movement and consumption patterns, we can identify the weak points of our destination and its products, remove these roadblocks and generate more value from the visitors already attracted, improving their satisfaction and thereby increasing their propensity to recommend our destination and return for more.

This means we **will**

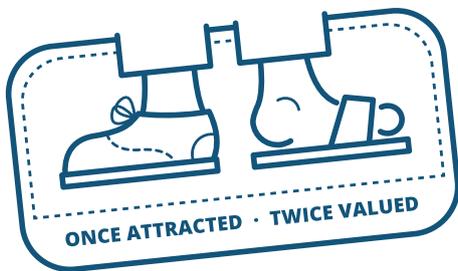
- **Introduce big data insights to strengthen our understanding of visitors' barriers to consume and identify our destination's pain points.** We will develop updated visitor insights based on new big data sources and capabilities, combining digital data with existing data sources to strengthen our shared understanding of visitors' barriers to consume and map out where friction occurs between our visitors and the positive experience of our destination.
- **Remove barriers to our visitors' path to purchase.** We will develop relevant experiences and products and promote them through relevant channels, targeting visitors.
- **Target efforts at visitors of high conversion potential.** We will identify visitors of high potential to convert for further and broader destination consumption.
- **Introduce initiatives to boost the loyalty of visitors.** We will work to increase our visitor retention and the propensity of our visitors to recommend our destination to others and return for repeat visits.

This means we **will not**

- **Measure or be measured solely in terms of bed-nights or business attracted.** We need more effective, insightful and relevant measures of success and value creation to reflect the contribution of our industry to society at large.
- **Regard all travellers as disconnected segments** between business and leisure, but rather, learn to see travellers as individuals or microsegments with their own motivations, cultural context and hence potential to be converted further along the path to purchase.

We **succeed** when

- **We punch above the weight of our bed-nights!** When the consumption generated is significantly higher than the number of bed-nights would directly imply.
- **We increase the average length of stays and repeat visits!** When efforts to inspire longer stays, encourage additional travel companionship and motivate repeat visitors manifest themselves in additional visits.



OUR TEAM'S PERSPECTIVE

"I share Copenhagen not only as a preferred destination for business meetings and professional purposes, but also as an ideal spot for a personal break – in between meetings and just for fun."

(Anna, Wonderful Copenhagen)

2017 ACTIVITIES

- **Carry out study of lost time** to identify bottlenecks and possible roadblocks on our visitors' path to further purchase.
- **Introduce a repeat-visit communication strategy** to promote relevant products and experiences in order to increase our number of repeat visitors.
- **Identify methods to measure consumption, average length of stays, and repeat visits** on a more updated basis.
- **Develop 'bleisure' initiatives** to convert attracted business travellers to leisure visitors.
- **Advance 'Smart Event City' initiative** to create broader value from large events attracted and smaller, recurring events.

OUR STAKEHOLDERS' PERSPECTIVE

Key results of Wonderful Copenhagen's 2016 Stakeholder Survey

Beyond bed-nights!

Our stakeholders support moving beyond bed-nights in measuring the industry's value creation and ours.

Business travellers are cultural too! The majority of our stakeholders clearly find the attraction of conferences and meetings most important among Wonderful Copenhagen's existing core business areas. Only cultural institutions see this as significantly less important, demonstrating the necessity of breaking down and working across traditional visitor segmentation to enable cultural institutions to gain more value from our destination's many business travellers.

We have yet to crack the code!

Feedback from our stakeholders clearly indicates that there is still some way to go for Wonderful Copenhagen to demonstrate a role in converting data to concrete business insights and development initiatives. The use of digital data to understand and strategically influence visitor destination consumption and sentiment will be key to our success, and measuring our results, in the coming four years.

TOMORROW'S BUSINESS TODAY



By 2020, international passenger arrivals are expected to reach 1.6 billion people globally. Driven by technological development, urbanization and growing domestic consumption, this increase in global travel will be driven by a new population of travellers, especially from the Asian region. Long-term investment is required today to ensure the business of these future growth markets tomorrow. We need to increase familiarity with our destination, ensure direct air accessibility and improve the availability of relevant products and experiences. However, it is not simply a question of increasing visitor numbers, but also focusing on the attraction of the most relevant business for our destination. We will need to strengthen our targeted efforts towards market segments with high growth potential for our destination.

This means we **will**

- **Continue to attract new business.** We will continue and strengthen our existing efforts to increase the number of visitors to Greater Copenhagen within our primary business areas of attracting meetings, conventions and events, as well as cruise lines and airlines, and we will introduce new market segments to these efforts to ensure long-term visitor growth.
- **Strengthen efforts to increase air connectivity** from overseas markets with a special focus on developing high-potential growth markets.
- **Insist on our long-term responsibility.** We will pursue our role as the caretaker of the destination's long-term growth perspectives, based on continuously updated trend and market research.
- **Focus on markets with the highest business potential,** including segments of long-term loyalty potential and markets of high average spending or with large-size meeting potential.

This means we **will not**

- **Segment markets solely in terms of geography or demographics,** but through focused analysis of high-potential market segments within and across national borders.
- **Engage in activities to ensure short-term business** or activities with less business potential, but, rather, enable our partners to actualise the direct business themselves to ensure more immediate profit.

We **succeed** when

- **We are attracting the highest-potential market segments!** When Copenhagen is first in class in competing for the favour of the highest-potential segments of new growth markets, beating other global brand destinations.
- **The long-term market potential we invest in manifests itself in actual business for our partners!** When our long-term investment and effort in developing a new growth market – in terms of increasing familiarity, ensuring air connectivity and leading high-potential travellers to the path to purchase – result in direct return on investment for our partners.



OUR TEAM'S PERSPECTIVE

"I share the latest Chinese market trends and insights, tips and tricks on how best to serve your Chinese customers to enable our local partners to increase their return on investment from the Chinese travel market."

(Philip, Wonderful Copenhagen)

2017 ACTIVITIES

- **Introduce sales efforts aimed at new market segments** within the Chinese cruise and incentive travel market to attract more Chinese visitors.
- **Convert more convention bids to business** through implementation of the new 2020 Meetingplace strategy.
- **Focus Wonderful Copenhagen's new market efforts** on travel segments of high long-term potential to our destination.
- **Prioritize new growth markets** and new growth segments beyond geography (new market micro-segmentation).
- **Strengthen our air route development efforts** with the overall purpose of developing even stronger international connectivity at a both national and regional level in cooperation with existing and new public and private partners.

OUR STAKEHOLDERS' PERSPECTIVE

Key results of Wonderful Copenhagen's 2016 Stakeholder Survey

Business travel is important business!

Our stakeholders agree that the business of attracting conferences and meetings is not only important to the future growth of our destination, but also the top priority for Wonderful Copenhagen to continue with in coming years.

Long-term interests at heart!

Our stakeholders agree that Wonderful Copenhagen need to have the destination's overall and long-term development at heart. Yet, network members in particular would also like us to dedicate efforts to co-creating more immediate business from existing markets. The continued existence and management of networks like Meetingplace, the Cruise Copenhagen Network, the Cruise Baltic Network and Copenhagen Card will address this priority, while also introducing initiatives to ensure the long-term business potential from new growth markets.

CO-INNOVATION AT HEART



In today's fast-paced world of change and transition, digital revolution and consumer empowerment, the big fish no longer eat the small: instead, the fast fish eat the slow. The digital economy allows new players to enter the market, leaving innovation as an increasingly open process with broader involvement from many different participants. To Wonderful Copenhagen, collaborative networks have and continue to be a prevalent modus operandi in our work towards a shared target of attracting more business to Greater Copenhagen. However, to match our fast-paced surroundings, we need to ensure sufficient agility within our existing networks to think in new ways and adapt to our new competitive landscape.

This means we **will**

- **Launch platform for co-innovation.** We will develop a systematic way of innovating new solutions together with current and new partners. We will take lead in defining and scoping the right destination challenges, bringing in relevant data and the right human capabilities, and through well-designed processes strengthen our collective agility and ability to move this strategy from words to action as a destination.
- **Crowdsource ideas from many parties.** We will focus on an open idea process, where ideas are crowdsourced from many sources – current partners and new industry players alike.
- **Cultivate a culture of shared innovation and fast failures.** We will develop a stronger organizational and collaborative culture of innovation, where experimenting and failing is accepted and even celebrated. As long as you fail fast and learn from it.

This means we **will not**

- **Innovate for the sake of innovation.** Innovation will always be aimed at converting ideas into concrete business and supporting the strategic direction as outlined in our 2020 strategy.
- **Own the results.** Initiatives or projects that come out of the innovation process. If proven viable and

valuable to partners and the public good, initiatives should either be integrated with the core business of Wonderful Copenhagen or become entrenched within the relevant market players.

We **succeed** when

- **Ideas are converted to concrete business!** When open innovation processes lead to ideas that generate new business for partners and add value to society in terms of growth and jobs.
- **Existing networks prove their agility in innovating!** When networks innovate within or between themselves, with new players or non-industry representatives in generating new insights and business for all.
- **Wonderful Copenhagen prove relevant to more stakeholders!** When we generate relevant value for a larger circle of partners, including new players both within and outside the travel industry.



OUR TEAM'S PERSPECTIVE

"I share learnings from collaborative experiments with cultural institutions through a shared community platform to spread ideas, inspire new ones and enable others to experiment their way to a stronger business model themselves."

(Louise, Wonderful Copenhagen)

2017 ACTIVITIES

- **Introduce a new Astronaut initiative** in which Wonderful Copenhagen team members will create small satellites in new environments to seek inspiration and encourage stronger idea-sharing across industries, between partners or with new partners.
- **Strengthen our stakeholder relations structure** and overview to ensure more efficient knowledge sharing, coordination and agility across collaborative networks and between stakeholders.
- **Initiate new co-innovation platform** for systematic collaboration across and beyond networks, with current and new stakeholders, driving destination- and travel-related innovation.
- **Create a corps of trendspotters** within and outside the metropolitan region made up of locals and super travellers alike, recruited to keep us in check and on track, challenging our perspective on our destination and the new trends to which we need to adapt.

OUR STAKEHOLDERS' PERSPECTIVE

Key results of Wonderful Copenhagen's 2016 Stakeholder Survey

Agility to keep up!

Our stakeholders expect us to be agile enough to adapt to the fast-paced changes in our surroundings. The vast majority expect us to be relevant as a collaboration partner in the future, and while stakeholders generally support the network model, they are not blind to possible alternative future collaboration models.

Without collaboration, no innovation!

Though our stakeholders are hesitant to prioritize our role in relation to start-ups, non-industry partners or sharing economy representatives, some also point to the necessity of rethinking the role of Wonderful Copenhagen from one of long-term operator to incubator of innovation projects. Whether as incubator, instigator or partaker, we cannot innovate in a vacuum and need to engage openly with many and more to ensure the competitive and innovative development of our destination.

PEOPLE-BASED GROWTH



As one of the world's most livable cities and regions, Greater Copenhagen offers strong appeal to travellers, especially in an era of seeking out temporary localhood. Livability is intuitively entwined with the people living in it. The delivery of an authentic experience of a livable destination depends on the locals, while the livability of our destination in turn depends on the extent to which we ensure people-based growth and a destination in which locals interact with visitors in a way that is at least balanced and at best contributory to the livability of locals. While strengthening our efforts to attract more visitors, we increasingly need to do so from a people-based growth perspective: growing not only to increase the number of visitors, but also to expand the value of visitors both to society at large and on a human scale.

This means we **will**

- **Ensure updated insights on interaction between visitors and locals.** We will develop updated data and knowledge of visitor sentiment and interaction with locals, as well as the locals' sentiments and interaction with visitors in order to identify friction points.
- **Engage more stakeholders in ensuring people-based growth.** We will involve urban development stakeholders (public parties, city data platforms and urban planners) in ensuring the people-based growth of our destination and actively dissolving pain points of visitor pressure.
- **Work to enable shareable moments between locals and visitors.** We will identify relevant initiatives to enable positive encounters between visitors and locals.
- **Achieve our ambition of the perfect match between urban and countryside.** We will work to realize the shared Greater Copenhagen ambition to strengthen sustainable visitor growth and diversify the experiences of visitors.

This means we **will not**

- **Grow for the sake of growth**, but focus on enabling sustainable growth of our destination that is based on people and localhood.
- **Ignore the urgent issues of visitor pressure in other European destinations!** Though neither stakeholders nor citizens perceive the number of

visitors to be an urgent problem in our destination today, we will not put ourselves in the same reactive positions as our friends and colleagues in Berlin, Amsterdam and Barcelona. We will introduce proactive measures to ensure the continued sustainable co-development of visitor growth and local livability.

We **succeed** when

- **Locals recognize the value of our visitors!** When locals actively advocate for the value added by visitors to our urban diversity, cultural consumption and pride in our hometown.
- **Visitors become active advocates for our destination!** When we deliver a sense of localhood that allows visitors to integrate themselves in a unique local experience and return home as active recommenders of our destination to others.
- **Sustainable growth is considered the only relevant kind of growth!**



OUR TEAM'S PERSPECTIVE:

"I share new results co-created by our organization and partners to enhance the recognition of value added both to commercial stakeholders and to our society at large"

(Uffe, Wonderful Copenhagen)

2017 ACTIVITIES

- **Carry out annual visitor assessment research** to understand their sentiment and potential friction points, including the appeal and nature of livability and localhood as our destination's selling points.
- **Carry out citizen assessment research** to stay updated on local sentiment towards visitors and the need for adaptive measures.
- **Advance our corporate communication of the positive contribution of tourism to society**, moving beyond bed-nights to a broader growth perspective, including the contribution of the visitor economy to the internationalization of society, export, cultural diversity, creativity and innovation.

OUR STAKEHOLDERS' PERSPECTIVE

Key results of Wonderful Copenhagen's 2016 Stakeholder Survey and Citizen Assessment Survey

Mass tourism not yet a massive issue!

Our stakeholders do not perceive mass tourism as an urgent and prioritized problem, but instead prefer continued efforts to attract more visitors. Our locals similarly welcome the prospect of more visitors (96%), although 7% are hesitant to see more visitors during peak season or accommodated in holiday flats (9.5%).

Our locals are willing ambassadors!

The locals of Copenhagen Capital region recognize the value added by visitors in internationalizing their hometown, creating a basis for a more diverse cultural scene, and in making them proud of their localhood. At the same time, 46% feel very or somewhat responsible for providing our visitors with a positive experience, while 17% feel only a limited or no responsibility. The majority of ideas proposed by locals, as part of our open strategy process, concern the delivery of a positive experience of localhood specifically – gaining more access to local recommendations or easier access to experiencing local lifestyle.

2020 MARKS OF SUCCESS

Leaving room for adaptation, detours and game-changers in a time of disruption and redefinition, we will need to keep ourselves in check by steering according to our five new strategic coordinates and aiming for the realization of key overall objectives.

The key objectives are aimed at measuring the value added to three overall target groups: our society, our visitors and our locals.

All three are closely interrelated.

MARK OF SUCCESS #1: SOCIO-ECONOMIC REVENUE OF DKK 49+ BILLION BASELINE 2016: 41+ BILLION

This mark of success is based on Visit Denmark's calculations of tourism revenue in 2014 and our own estimate of bed-night growth in the Capital Region, based on historical growth. The mark of success also considers national 2025 growth expectations for commercial and non-commercial bed-nights.

The plus sign in the numbers reflects our aim to generate more value from visitors attracted, generating more revenue than the number of bed-nights would imply.

The plus sign also marks our shift in focus from tourism-economic to socio-economic revenue, refocusing on our industry as one of broader societal impact.

Today, we have limited means and methods to measure this broader value, nor do we have updated or accurate revenue numbers. Our goal is to be able to monitor revenue more closely, on a more updated basis and in a broader societal perspective.

MARK OF SUCCESS #2: VISITORS' INTENTION TO RECOMMEND: 77% BASELINE 2016: 73%

The inclination of visitors to recommend us is the most important indicator of their satisfaction with their stay. As part of our new strategy, our focus will essentially shift to promoting our destination through, not to others. With personal recommendations and word of mouth as key influencing factors, our ability to facilitate the positive and shareable moments that encourage post-visit recommendations will be essential.

The Travelsat Competitive Index by TCI Research (approved by UNWTO and the European Travel Commission) indicates the intention of visitors to recommend our destination to others after their visit. The index is also used by VisitDenmark. TCI Research suggests an ambitious mark of success of 77% of visitors to our destination leaving with the intention to recommend. This mark of success is based on historical development, taking into account that expensive destinations generally have difficulty raising their score due to price levels.

MARK OF SUCCESS #3: CITIZENS' SUPPORT OF VISITOR GROWTH >80% BASELINE 2016: N/A

People-based growth and the support of our locals are key to achieving our 2020 vision. We will introduce frequent studies to measure the sentiments of the locals towards visitors, identifying friction points and directing efforts at mitigating them.

The mark of success is that more than 80% of citizens support to visitor growth. This mark is based on the results of the studies carried out as part of our 2016 strategy process. These results indicate strong local support for the industry and the value added by visitors to the respondents' hometown.

Of citizens in the Capital Region, 98% believe that tourism contributes positively to the region, while 78.7% of citizens in the city of Copenhagen believe – without reservation – that we have room for more visitors. To continue our growth, we need to ensure that the citizens of our entire region remain supporters of this growth.

VISION
LOCALHOOD FOR EVERYONE

MISSION
**WE WILL ENABLE OUR DESTINATION
TO BE SHARED MORE**

STRATEGIC COORDINATES

1. SHAREABILITY IS KING

- Develop business intelligence to optimize community embracement of brand essence.
- Enable partners to develop shareable moments.
- Lead and encourage 365-days-a-year storytelling.
- Enable the right people to tell the right stories.

2. ONCE ATTRACTED, TWICE VALUED

- Introduce big data insights to identify visitors' barriers to consume and understand friction points between visitors and our destination.
- Remove barriers to our visitors' path to purchase.
- Target efforts at visitors of high conversion potential.
- Introduce initiatives to boost loyalty of visitors.

3. TOMORROW'S BUSINESS TODAY

- Continue our efforts to attract new business.
- Strengthen efforts to increase air connectivity.
- Insist on our long-term responsibility.
- Focus on markets with the greatest business potential.

4. CO-INNOVATION AT HEART

- Launch a co-innovation platform.
- Crowdsource ideas from many parties.
- Cultivate a culture of shared innovation and fast failures.

5. PEOPLE-BASED GROWTH

- Ensure updated insights on interaction between visitors and locals.
- Engage more stakeholders in ensuring people-based growth.
- Work to enable shareable moments between locals and visitors.
- Achieve our ambition of the perfect match between urban and countryside.

2017

- Develop 365-days-a-year brand strategy
- Deliver data insights to qualify selection of influencers
- Discontinue City Break Network.

2017

- Carry out lost-time study
- Introduce repeat-visitor communication strategy
- Develop new measurement methods
- Develop 'bleisure' initiatives
- Advance 'Smart Event City' initiatives.

2017

- Introduce sales efforts in Chinese cruise and incentive markets
- Focus on high-potential segments
- Prioritize new growth markets
- Strengthen air connectivity efforts.

2017

- Introduce Astronaut initiative
- Strengthen our stakeholder relations structure
- Initiate co-innovation platform
- Create a corps of trends-potters.

2017

- Carry out annual visitor and citizen assessments
- Advance our corporate communication of the positive contribution of tourism to society.

2020 MARKS OF SUCCESS

DKK 49+
BILLION
IN SOCIO-ECONOMIC REVENUE

77%
VISITORS
HAVE INTENTION TO RECOMMEND

+80%
CITIZENS
SUPPORT VISITOR GROWTH

A NEW BEGINNING OF
LOCALHOOD
STARTS NOW

