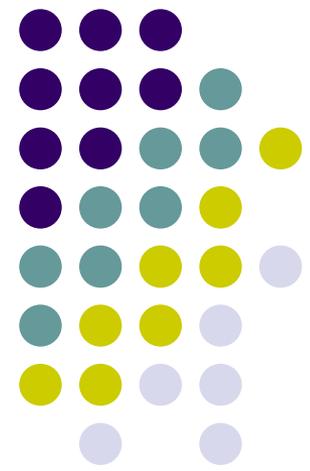


DESTINATIONS	INDEX
PARIS	100
FRANKFURT	95
STOCKHOLM	90
MILAN	85
MUNICH	80
BERLIN	75
AMSTERDAM	70
ZURICH	65
BRUSSELS	60
VIENNA	55
BARCELONA	50
LONDON	45
ROME	40
MADRID	35
ATHENS	30
PRAG	25
WARSAW	20
ISTANBUL	15
SEOUL	10
SINGAPORE	5



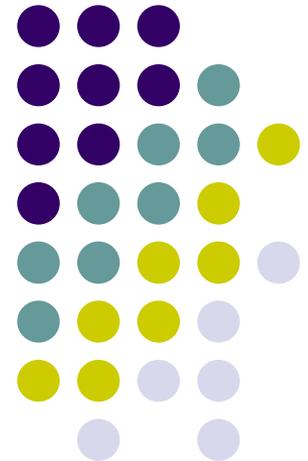
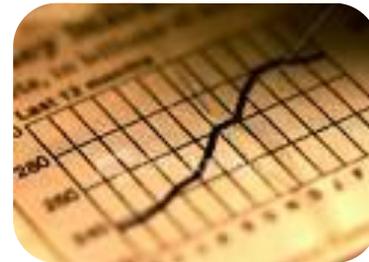
## Global Independent Benchmarking of Destinations' Competitiveness

***Report n°1***  
***Hospitality in European Cities:***  
***More than a smile...***



# TRAVELSAT Competitive Index

## 1/ Survey Presentation & Methodology



# Sample definition & Scope of analysis

- **International tourists** (at least 1 night at destination, all purposes of visit, all markets)
- **Data period** analyzed: 2011 to Q1/2013
- Selected analysis of **23 Indexes** related to the **human hospitality**
- **Focus on 5 markets**: UK, France, Germany, Japan, US, Russia:
- **Focus on 6 segments** : Leisure, Business, Families, Friends
- **Benchmark selection & sample sizes** :

EUROCITIES	NON EU CITIES
9 665	1 471

Main cities in North America, South-East Asia and Middle-East / North Africa

Amsterdam, Barcelona, Berlin, Brussels, Bruges, Budapest, Copenhagen, Cork, Dublin, Dubrovnik, Edinburgh, Florence, Geneva, Zurich, Genoa, Istanbul, Lisbon, Ljubljana, London, Lyon, Madrid, Milano, Munich, Nice, Marseille, Paris, Porto, Prague, Rome, Salzburg, Sofia, Turin, Venice, Vienna

# TRAVELSAT® Indexes Definition



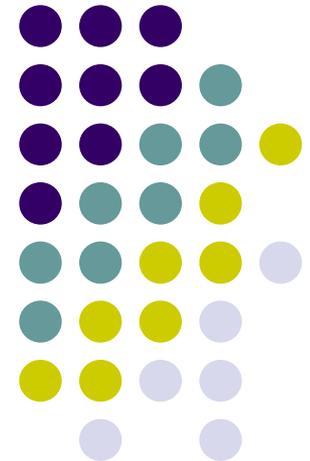
An Index for benchmarking  
Cities' hospitality competitiveness



*Note: the interpretation grid does not apply to price related Indexes*

## 2. TRAVELSAT Competitive Index

### Overview of the European Cities' Hospitality

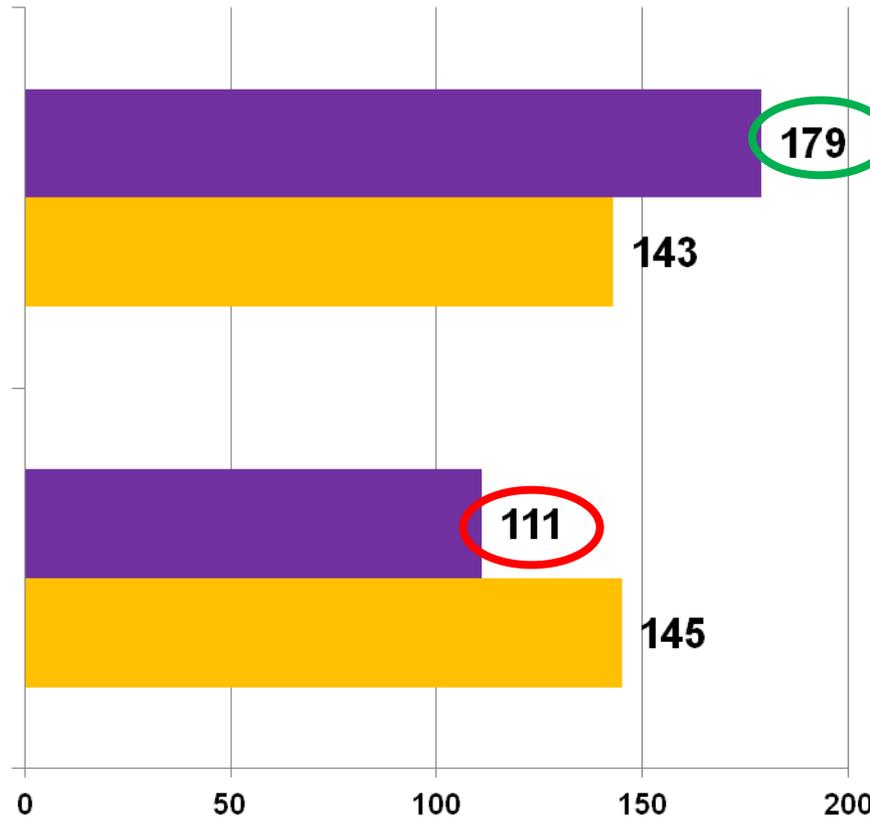




Overall fulfilment of expectations



Overall stay value for money



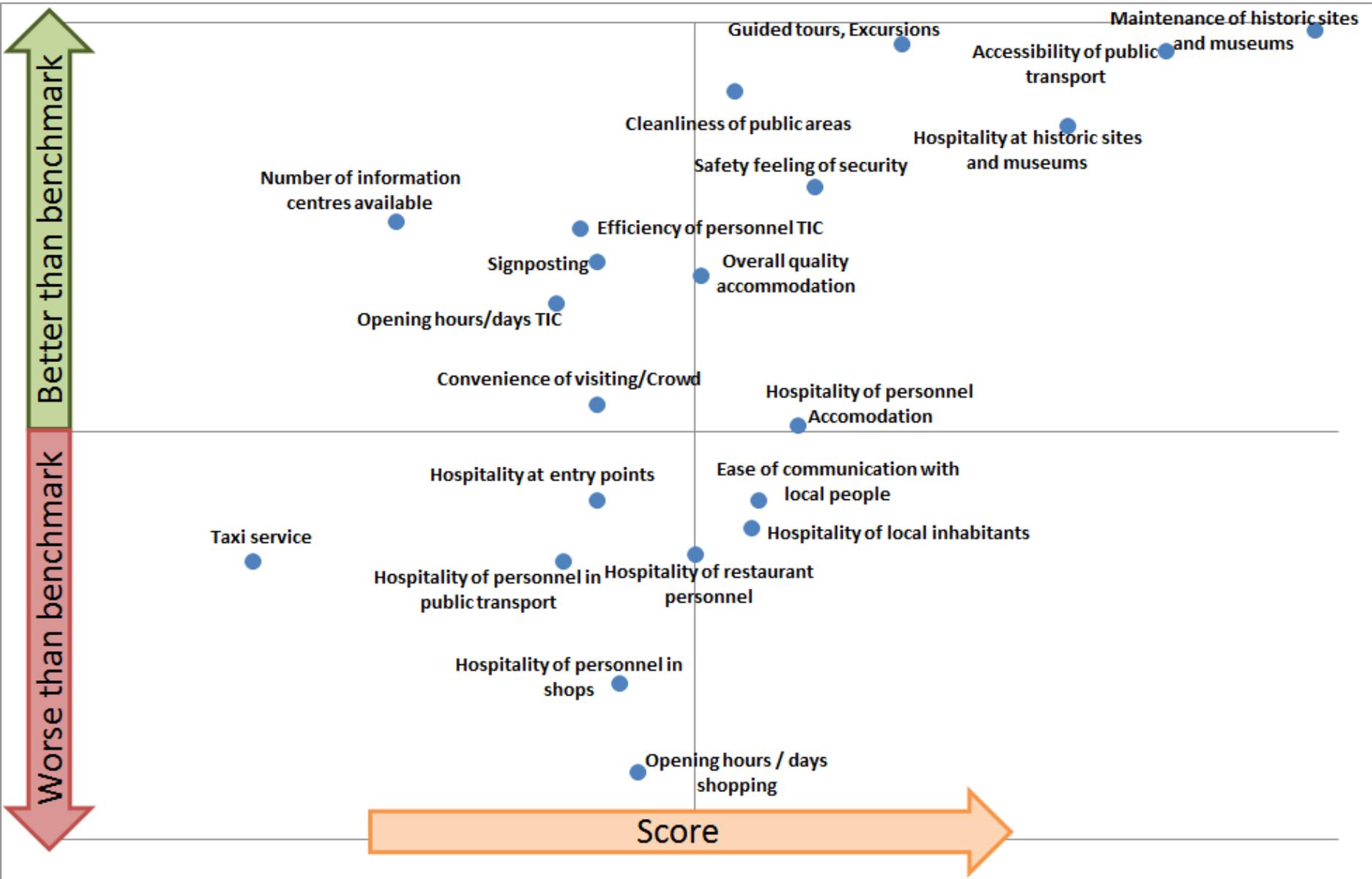
European Cities  
Non EU Cities

TRAVELSAT COMPETITIVE INDEX ©

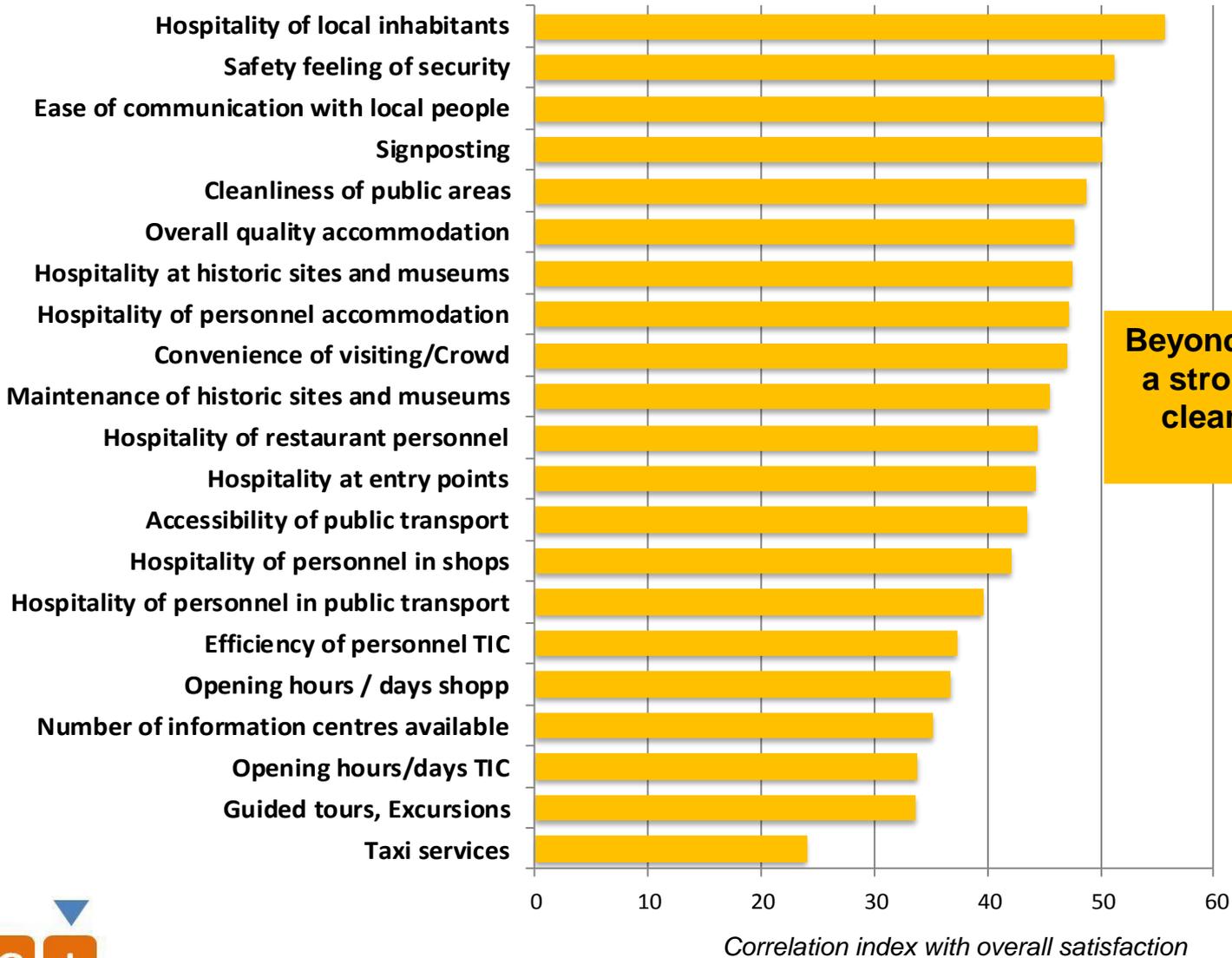
# Hospitality Measures



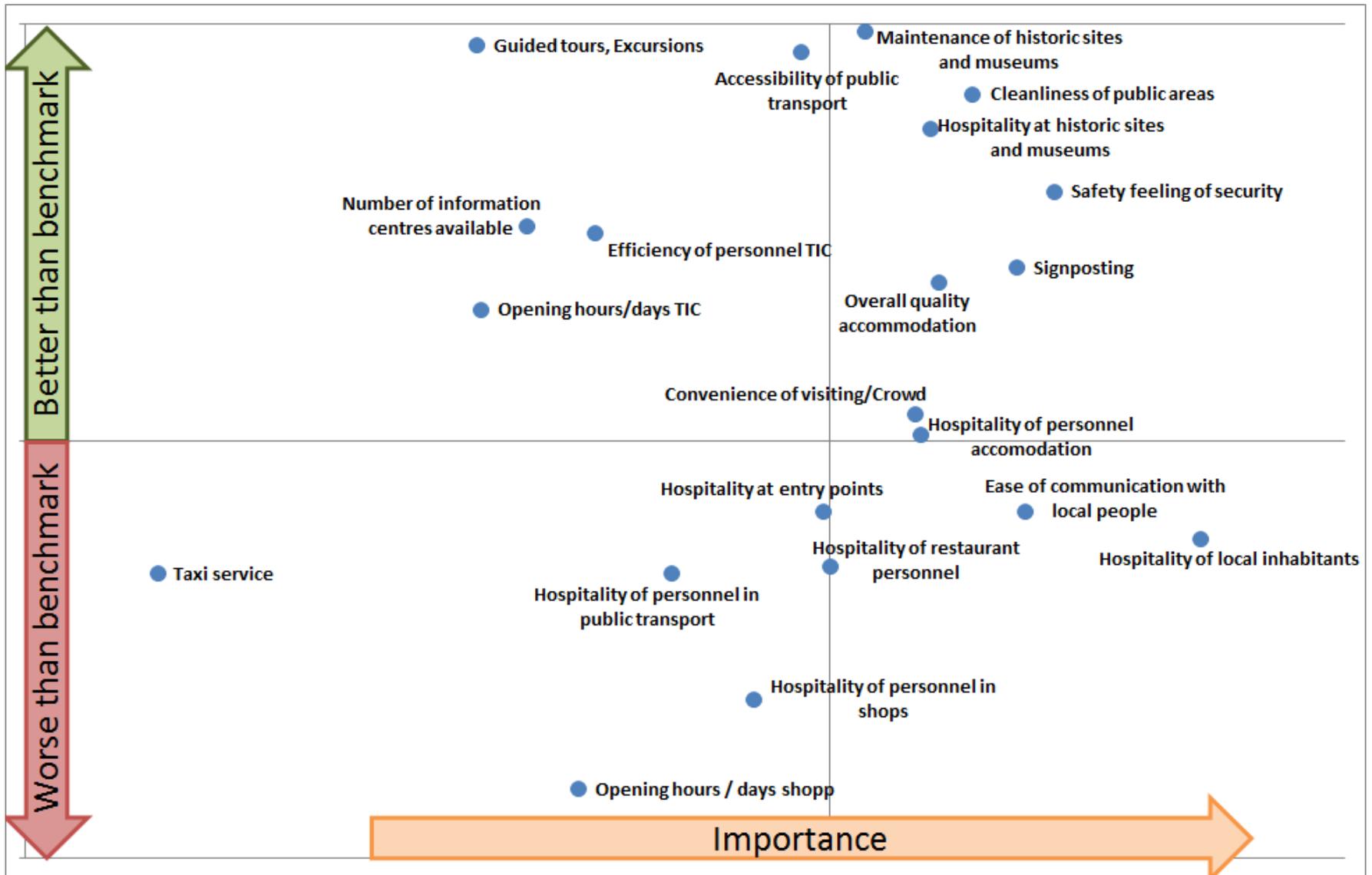
Local People Hospitality	Ease of communication with local people	121	
	Hospitality of local inhabitants	148	
Safety Feeling & Environment	Safety feeling of security	159	
	Cleanliness of public areas	145	
Visitor Information Centers	Opening hours/days TIC	114	
	Efficiency of personnel TIC	118	
	Number of information centres available	86	
Cultural Activities	Guided tours, Excursions	174	
	Convenience of visiting/Crowd	121	
	Hospitality at historic sites and museums	203	
	Maintenance of historic sites and museums	246	
Shopping	Opening hours / days shopping	128	
	Hospitality of personnel in shops	125	
Transportation	Signposting	121	
	Hospitality at entry points	149	
	Taxi service	61	
	Hospitality of personnel in public transport	115	
	Accessibility of public transport	220	
	Accom. & Food	Hospitality of restaurant personnel	138
	Hospitality of personnel Accomodation	156	
	Overall quality accommodation	139	



# What criteria mostly drive City Hospitality?

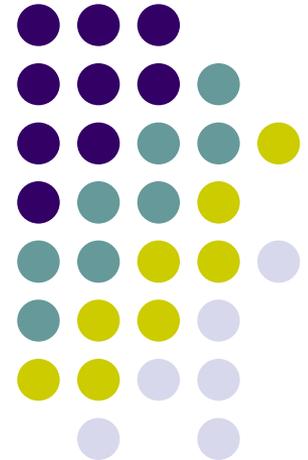


**Beyond tangible experience, a stronger need for a safe, clean and human based hospitality !**



# TRAVELSAT Competitive Index

Focus on specific markets



Maintenance of historic sites and museums	224
Accessibility public transport	172
Hospitality in historic and museums	153
Feeling of security	143
Accommodation hospitality of personnel	139
Overall quality accommodation	127
Guided tours / Excursions	113
Cleanliness of public areas	113
Hospitality of local people	111
Opening hours/days shops	106
Hospitality of restaurant personnel	104
Hospitality at entry points	101
Hospitality of personnel in shops	91
Ease of communication with local people	84
VIC opening hours/days	80
Efficiency of personnel in VIC	74
Hospitality public transport	65
Signposting	50
Taxi service	49
Convenience of visiting/Crowd	43
Number of information centres available	19

(Base = 968)

Overall accommodation quality



**Hospitality at entry points**  
**Signposting**  
**Convenience of visiting /Crowds**



Maintenance of historic sites and museums	221
Hospitality in historic and museums	208
Accessibility public transport	186
Guided tours / Excursions	176
Hospitality of local people	169
Convenience of visiting/Crowd	164
Hospitality at entry points	158
Feeling of security	157
Accommodation hospitality of personnel	155
Hospitality of restaurant personnel	149
Opening hours/days shops	149
Overall quality accommodation	142
Ease of communication with local people	141
Signposting	126
Hospitality of personnel in shops	125
Cleanliness of public areas	114
VIC opening hours/days	109
Hospitality public transport	96
Efficiency of personnel in VIC	95
Number of information centres available	79
Taxi service	29

(Base = 1590)

Local people hospitality  
Convenience for visiting / crowds



Cleanliness of public areas (sidewalks...)



Maintenance of historic sites	249
Accessibility public transport	232
Hospitality in historic and museums	217
Guided tours / Excursions	189
Accommodation hospitality of personnel	186
Hospitality at entry points	181
Hospitality of restaurant personnel	170
Opening hours/days shops	164
Feeling of security	164
Cleanliness of public areas	162
Overall quality accommodation	159
Hospitality of local people	159
Ease of communication with local people	142
Signposting	139
Efficiency of personnel in VIC	137
Hospitality of personnel in shops	136
VIC opening hours/days	134
Convenience of visiting/Crowd	132
Hospitality public transport	125
Number of information centres available	86
Taxi service	85

(Base = 841)

**Restaurant hospitality  
Shops opening hours/days**



**Convenience of visiting /Crowds  
Safety feeling  
Local people hospitality**



Maintenance of historic sites and museums	264
Hospitality in historic and museums	237
Accessibility public transport	231
Guided tours / Excursions	209
Accommodation hospitality of personnel	206
Feeling of security	193
Hospitality of local people	190
Ease of communication with local people	174
Overall quality accommodation	172
Efficiency of personnel in VIC	169
Cleanliness of public areas	169
Hospitality at entry points	167
Hospitality of restaurant personnel	165
Hospitality of personnel in shops	138
Convenience of visiting/Crowd	127
VIC opening hours/days	125
Number of information centres available	124
Signposting	116
Opening hours/days shops	113
Taxi service	112
Hospitality public transport	105

(Base = 698)

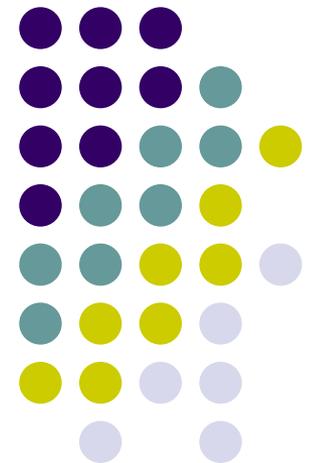
Ease of communication with local people



**Hospitality in pub. transport**  
**Shops opening hours/days**  
**Signposting / VIC efficiency**  
**Hospitality at entry points**

# TRAVELSAT Competitive Index

Focus on specific segments





Maintenance of historic sites and museums	255
Accessibility public transport	219
Hospitality in historic and museums	215
Guided tours / Excursions	176
Hospitality at entry points	175
Accommodation hospitality of personnel	173
Feeling of security	171
Overall quality accommodation	161
Cleanliness of public areas	154
Hospitality of local people	154
Hospitality of restaurant personnel	152
Hospitality of personnel in shops	143
Opening hours/days shops	143
Ease of communication with local people	134
Signposting	128
VIC opening hours/days	125
Efficiency of personnel in VIC	123
Hospitality public transport	121
Convenience of visiting/Crowd	120
Number of information centres available	87
Taxi service	84

(Base = 2301)

Visitor information centers  
opening hours/days



Convenience of visiting / Crowds



Maintenance of historic sites and museums	240
Accessibility public transport	222
Hospitality in historic and museums	186
Guided tours / Excursions	171
Cleanliness of public areas	146
Feeling of security	143
Hospitality at entry points	138
Hospitality of local people	137
Accommodation hospitality of personnel	129
Convenience of visiting/Crowd	126
Opening hours/days shops	118
Overall quality accommodation	116
Hospitality of restaurant personnel	113
Signposting	112
Ease of communication with local people	112
Hospitality of personnel in shops	110
Hospitality public transport	105
VIC opening hours/days	100
Efficiency of personnel in VIC	97
Number of information centres available	74
Taxi service	49

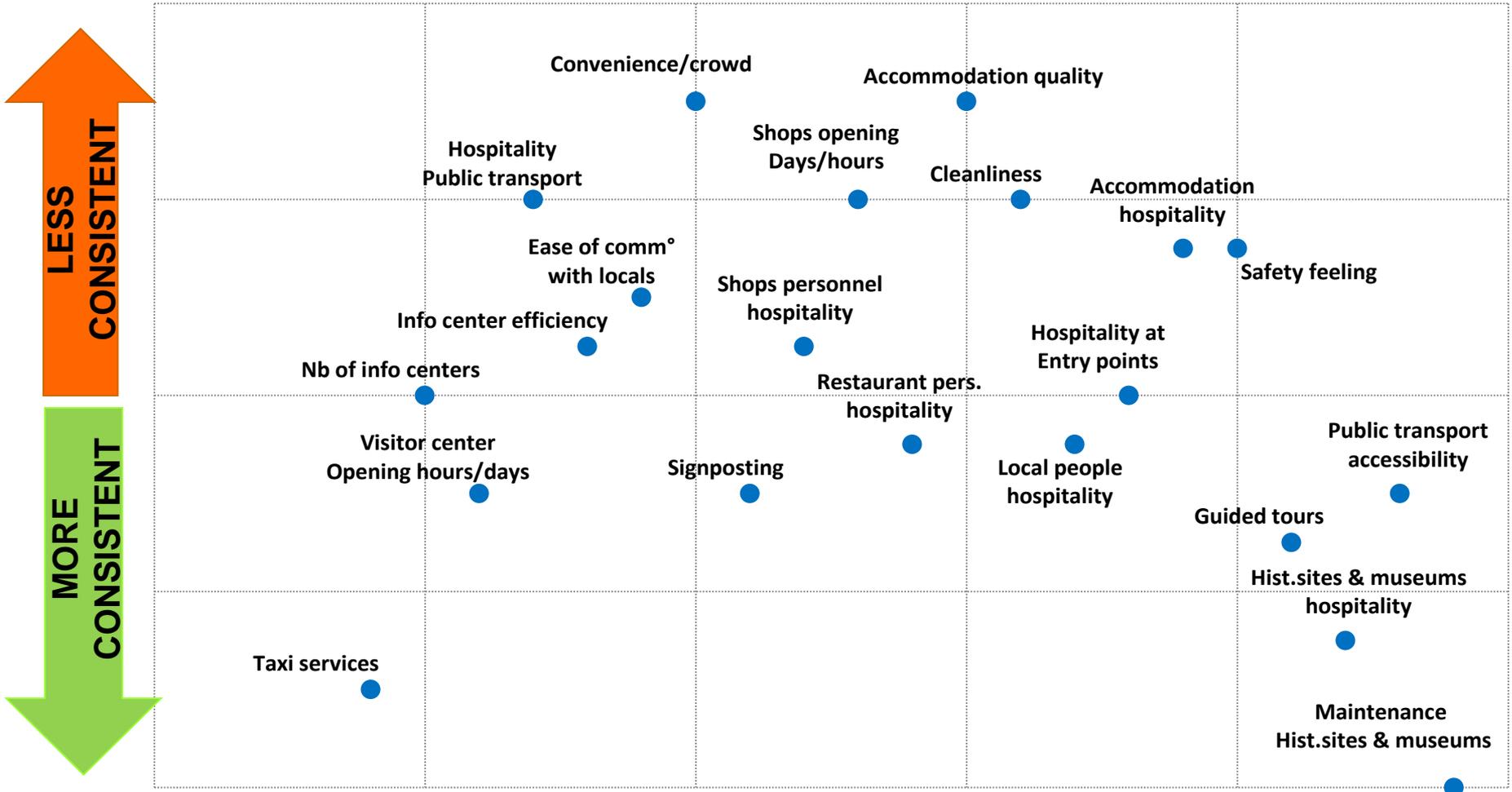
(Base = 2365)

**Cleanliness of public areas**  
**Convenience for visiting / crowds**



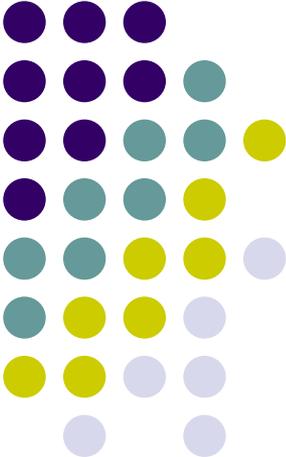
**Accommodation staff hospitality**  
**Hospitality of personnel in shops**

# QUALITY CONSISTENCY ACROSS SEGMENTS AND MARKETS



# TRAVELSAT Competitive Index

## Conclusion



**We live in a small  
complex world**