

# Market Profile 2019

## Germany

08/10/2019

# Introduction

VisitDenmark's market profiles present key data for the most important markets in Danish tourism.

The objective is to provide tourism stakeholders and third parties with some insight into the importance of Danish tourism in a number of markets..

See all our market profiles here:

[www.visitdenmark.dk/corporate/videncenter/markedsp profiler](http://www.visitdenmark.dk/corporate/videncenter/markedsp profiler)

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# Key Data and Target Groups



# Key Data: Accommodation, Expenses and Turnover

15.7 m.  
overnight stays in 2018

524,400  
additional overnight stays compared to  
2017

+3.5%  
increase in overnight stays compared to  
2017

15.2 bn DKK.  
in Tourism Turnover in 2017

8%  
of the Germans are well acquainted with  
Denmark as a holiday destination

75%  
of Germans access the internet via a  
smartphone



## Coastal and Nature Tourism

14.8 m  
overnight stays\*

2.1 people  
tour group

7.9 nights  
length of stay

650 DKK.  
daily expenses

80%  
come from Northwest Germany



## City Tourism

0.9 m.  
overnight stays\*

1.4 people  
tour group

3.0 nights  
length of stay

1,450 DKK.  
daily expenses

76%  
come from Northwest Germany

# The German Target Groups

The Germans travel as couples as well as with children under the age of 18

## Couples



30 - 65 year-olds

-  City breaks
-  Couples
-  Couple friends
-  Friends
-  Holiday home
-  Camping
-  Hotel

Coastal and Nature Holiday

Couples

Holiday home

Camping

Hotel

## Families with kids



30 - 45 year-olds

Kids: 0 - 18 year-olds

-  Coastal and Nature Holiday
-  Families (incl. several generations)
-  Holiday home
-  Camping

Coastal and Nature Holiday

Families (incl. several generations)

Holiday home

Camping

## Residence



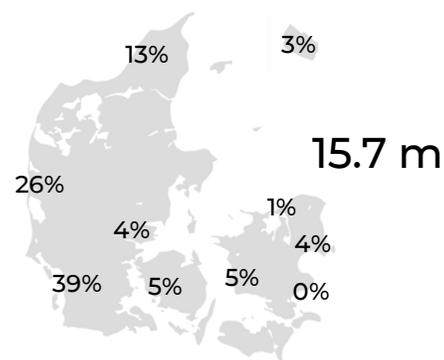
## Income level



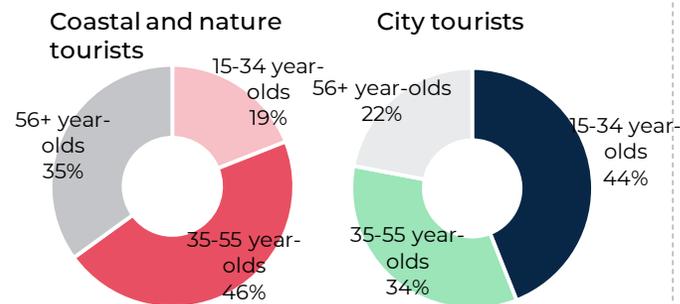
## Education level



## German overnight stays by regions\*



## German tourists in Denmark



## Functional necessities



- Shorter as well as longer holidays
- Home country over sun holiday
- Desire for a safe holiday destination
- Practical planning
- Acceptable price/quality experience

## Emotional necessities



- Quality time
- Rest & Relaxation
- Hospitality
- Exploring personal hobbies and passions

## What makes Denmark unique



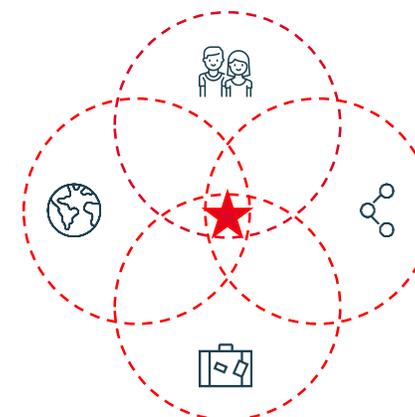
- Free access to nature and beaches
- Child-friendly and peaceful
- Local and fresh produce
- Accessible holiday destination

## The Digital Journey



- Dreaming: 1/3 are influenced by the internet
- Inspiration: 3/10 use visitdenmark.de
- Planning: 4/10 use websites from the respective destinations
- Booking: 2/5 book 1-3 months ahead of departure
- On-site planning: 4/10 use the internet
- Loyalty: 9/10 will return

# Segmentation Model



## Personalised Marketing for the most potential Target Groups in Germany

VisitDenmark uses a segmentation model with the German market, identifying the location of the most relevant German tourists. This, along with knowledge of media-use habits and holiday inspiration, makes for efficient and targeted marketing for the German target groups.

The model is presented here but will not be further discussed on the following pages.

## The Four Elements of the Segmentation Model



The Sinus analysis is a national segmentation model (SINUS®) of the entire German population and it classifies the German people in groups with common lifestyles, values and consumer behaviour\*.



The German Travel Analysis is an extensive reflection on the travel behaviour of the Germans and consists of more than 12,000 representative interviews conducted throughout Germany. A linkage of data from the German Travel Analysis and the Sinus Analysis provides a unique identification of the high potential segments in the German population.



Analysis of geographical areas in Germany with optimal travelling time to Denmark as well as an attractive holiday planner.



Identification of Sinus segments preferring respectively the German North Sea or the Baltic Sea and Denmark.

## Sinus Segments relevant to Denmark

### The Classical-Conservative

- High sense of duty and work ethic
- Want success and exclusivity

### The Adaptable Pragmatists

- Success-oriented and ambitious young people
- Ready to compromise

### The Creative Avant-Garde

- Creative and adventurous hyper-individualists
- Digital and mobile - mentally as well as geographically

### The Bourgeois Middle-Class

- Achievement-oriented and adaptable
- Looking for harmony and secure standards of living

### The Social Green Environmentalists

- Aware and critical of consumption
- Want to achieve a sustainable lifestyle

### The Liberal Intellectuals

- Informed and liberal
- Aim for a meaningful and authentic life

### The High-Performers

- Ambitious
- Focus on prestige and efficiency

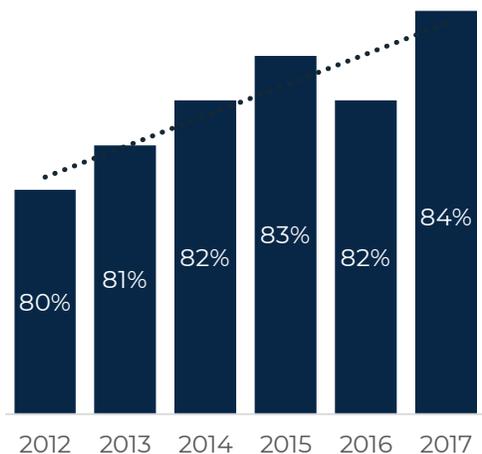
# The Digital Tourist



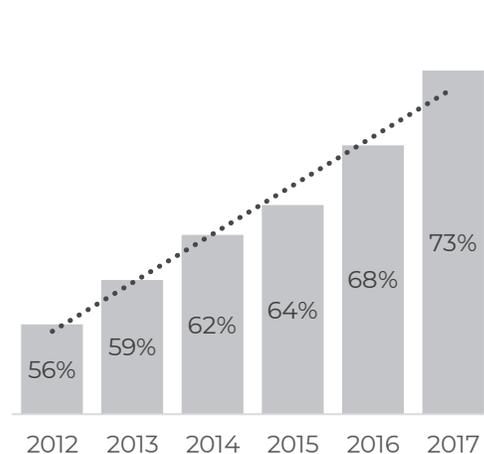
# Internet Usage

Smartphones overtake computers when it comes to the use of the internet

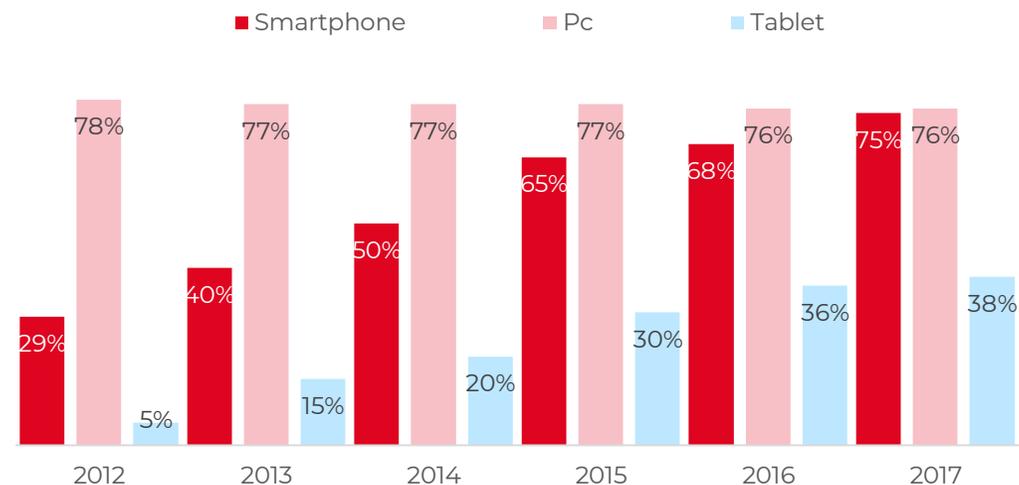
Access to the internet



Use the internet on a daily basis



Internet usage by device



Average number of online devices per person

2012	2013	2014	2015	2016	2017
1.8	2.2	2.4	2.6	2.8	2.9

Percentage using their smartphone as often as their pc to surf the internet

2012	2013	2014	2015	2016	2017
14%	19%	42%	52%	55%	65%

# Searches for Denmark

## An increase in searches for Denmark, Aalborg and Odense

Overall, there are far more online searches in Germany for *Dänemark* and *Kopenhagen* than there are for *Aarhus*, *Aalborg* and *Odense*.

In 2018, searches for *Dänemark*, *Aalborg* and *Odense* were significantly more numerous than in 2017. *Kopenhagen* and *Aarhus* as key words were used just as much in 2018 than in 2017.

The data do not reflect whether or not these searches are holiday related; however, they do indicate a high degree of interest for Denmark and Copenhagen.

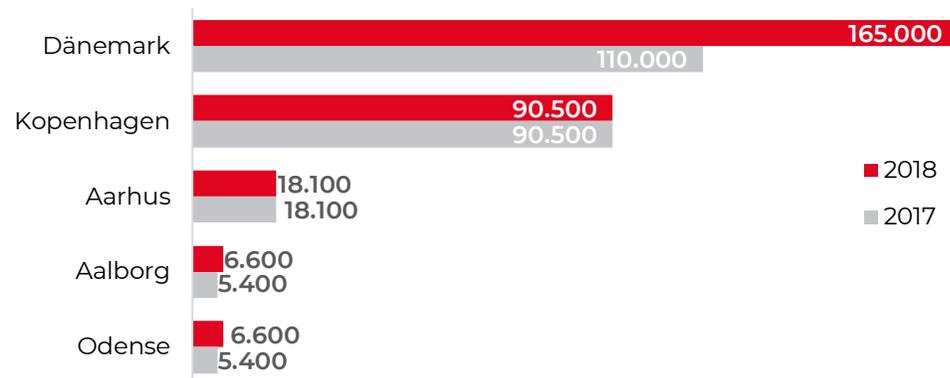
## Most searches are carried out during summer

Searches for Denmark and the four largest cities are carried out all year. However, most searches are carried out in the month of July.

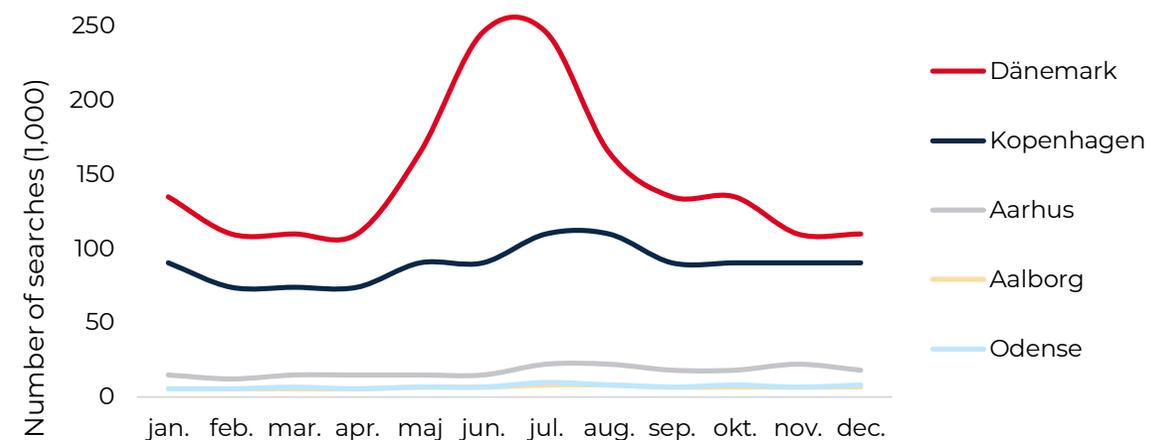
Searches for *Dänemark* rise from May onwards and peak in June and July. Searches for *Kopenhagen* peak in July and August.

**Growth in search volume for selected key words**

Average number of searches per month



**Seasonal variations in searches in 2018**



Source: ads.google.com, accessed 26th June 2019. Filters: Country: Germany, Language: German, Period: Jan.2017-Dec.2018

# Searches for the Danish East and West Coasts

## Searches for the Danish East and West Coasts have increased

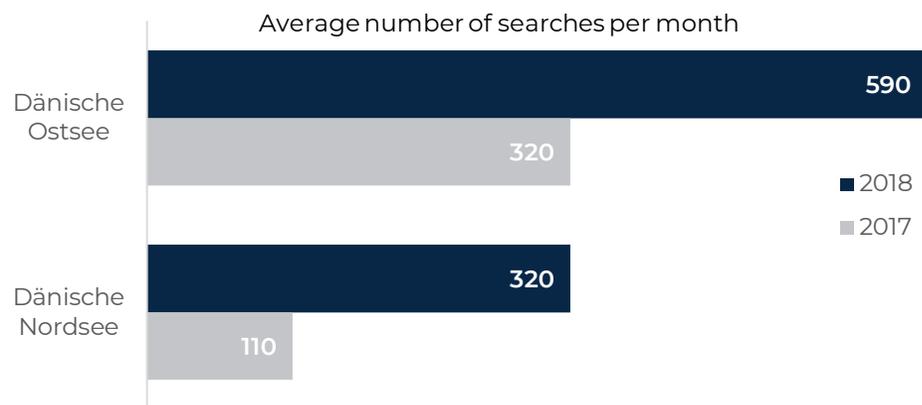
In 2017 as well as in 2018, more searches were carried out in Germany for *Dänische Ostsee* than for *Dänische Nordsee*.

In 2018, searches for *Dänische Ostsee* as well as *Dänische Nordsee* were significantly higher than in 2017.

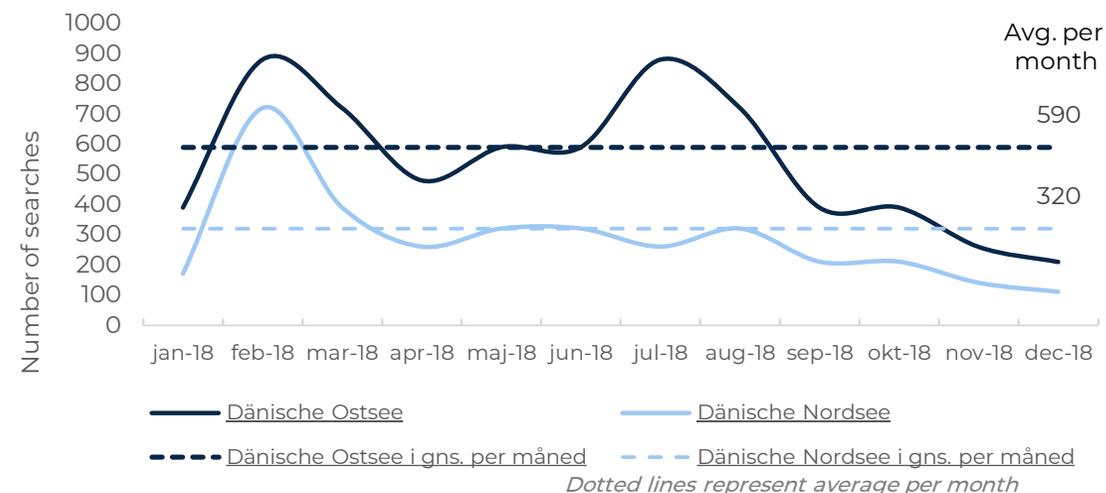
## Searches for Danish East and West Coasts peak in February

The number of searches vary from month to month and both search terms usually peak in the month of February. Moreover, the Germans search for *Dänische Ostsee* just as often in the month of July.

**Growth in search volume with Dänische Ostsee and Nordsee as search terms**



**Search volume of Dänische Ost and Nordsee as search terms in 2018**



Source: ads.google.com, accessed 26th June 2019. Filters: Country: Germany, Language: German, Period: Jan.2017-Dec.2018

# Holiday-related searches for the Danish East and West Coasts

## More holiday-related searches for the Danish East Coast in July

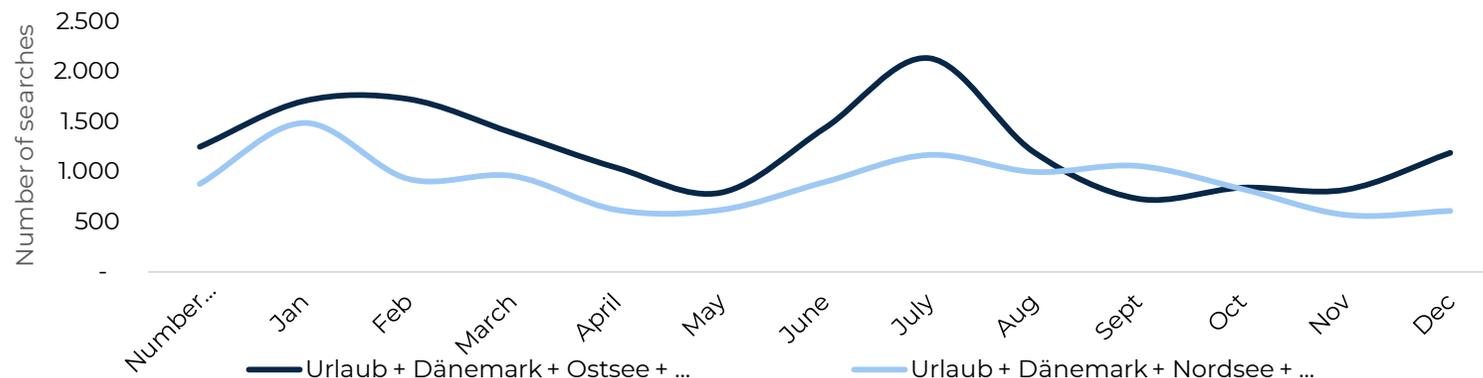
Holiday-related searches for the Danish East and West Coasts vary over the year. Searches for the Danish East Coast peak in July while searches for the Danish West Coast peak in January.

Both search terms appear the most in Lower Saxony and in North Rhine Westphalia. Moreover, searches for the Danish East Coast are very popular in Saxony and in Schleswig-Holstein, while searches for the Danish West Coast are very popular in Schleswig-Holstein, Mecklenburg-West Pomerania and Hamburg.

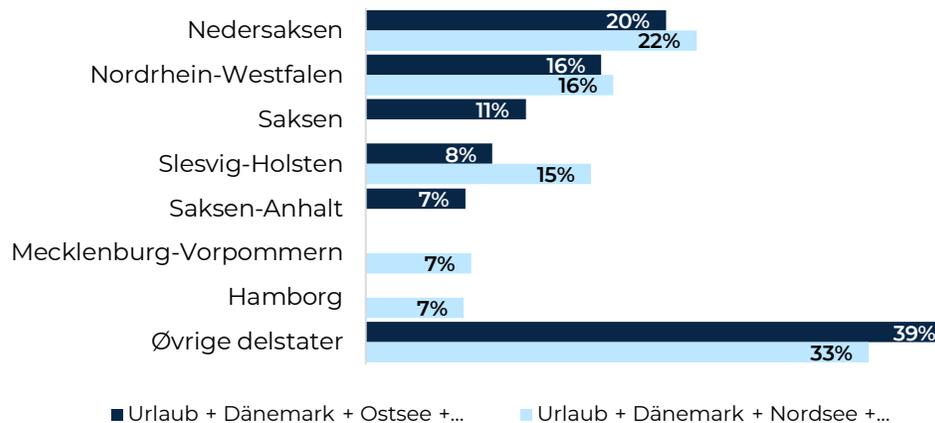
Holiday-related terms relating to the Danish East Coast are mainly carried out with a desktop, whereas the terms relating to the West Coast are mainly carried out by mobile phone.

\* The search terms include the words Holiday (*Urlaub*), Denmark (*Dänemark*) and East or West Coast (*Ost-/Nordsee*) and cover various combinations of words such as *Urlaub in Dänemark Ostsee*, *Urlaub Dänemark Nordsee Ferienhaus* etc.

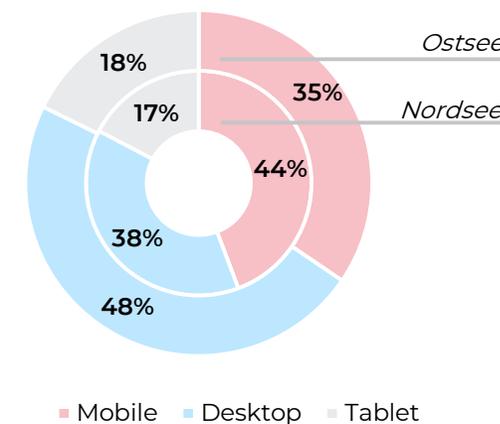
Growth in holiday-related search volumen of *Dänische Ost* and *Nordsee* as search terms in 2018



Divided into regions



Divided into platforms



# Searches for holiday-related topics

## The Germans particularly search for information on holiday homes in Denmark

Search terms regarding accommodation and in particular holiday homes (*Ferienhaus*) are used more often than search terms regarding holiday in general, transportation and activities, when the Germans search for information about Denmark\*.

When the Germans search for general information about Denmark, they are very interested in information about the weather (*Wetter*), maps (*Karte*) and holiday with dogs (*Urlaub mit Hund*).

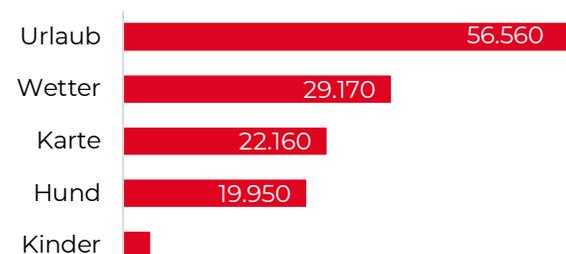
Among the transportation related search words, we find search terms regarding ferry boats (*Fähre*).

Sights (*Sehenswürdigkeiten*) and Beaches in Denmark are among the most commonly used activity-related search terms. Another frequent search term is Angling (*Angeln*).

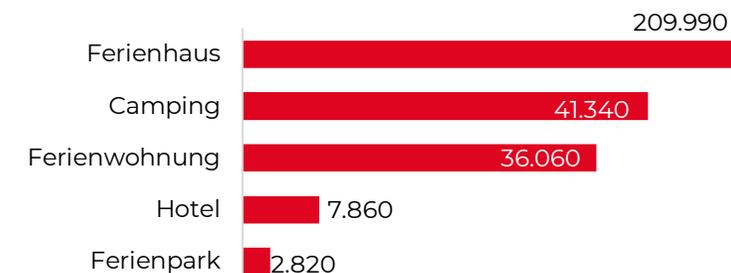
\* The search terms include the word Denmark (*Dänemark*) and cover various combinations of words such as *Urlaub in Dänemark*, *Dänemark Urlaub*, *Ostsee Urlaub Dänemark Nordsee Ferienhaus*, *Urlaub in Dänemark Ostsee etc.*

## Search volume with holiday-related topics in Germany relating to Denmark in 2018 (avg. per month)

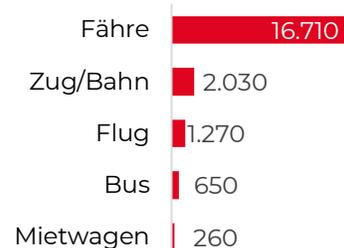
### Holiday in Denmark



### Accommodation in Denmark



### Transport in/to Denmark



### Activities in Denmark



# Holiday-related searches in selected German regions

## Popularity of search terms across German regions in 2018

*"Urlaub Dänemark"*



*"Ferienhaus Dänemark"*



*"Fähre Dänemark"*



*"Dänemark Sehenswürdigkeiten"*



## Holiday-related searches are very popular in Schleswig-Holstein

The maps indicate the popularity\* of the selected search terms in some selected German regions.

The search terms "Urlaub Dänemark", "Ferienhaus Dänemark", "Fähre Dänemark" and "Dänemark Sehenswürdigkeiten" were most popular\* in Schleswig-Holstein. In Mecklenburg-West Pomerania, "Urlaub Dänemark" was almost as popular in 2018.

Holiday-related search terms about Denmark are most popular in the regions of North Germany.

\*The popularity of a search term is calculated on a scale from 0 to 100, where 100 indicates the region with the highest volume percentage of search terms among all searches. The popularity of the search terms in the remaining regions is calculated as the percentage of the popularity in the region, where the search term was the most popular. Therefore, we are not discussing the absolute number of searches.

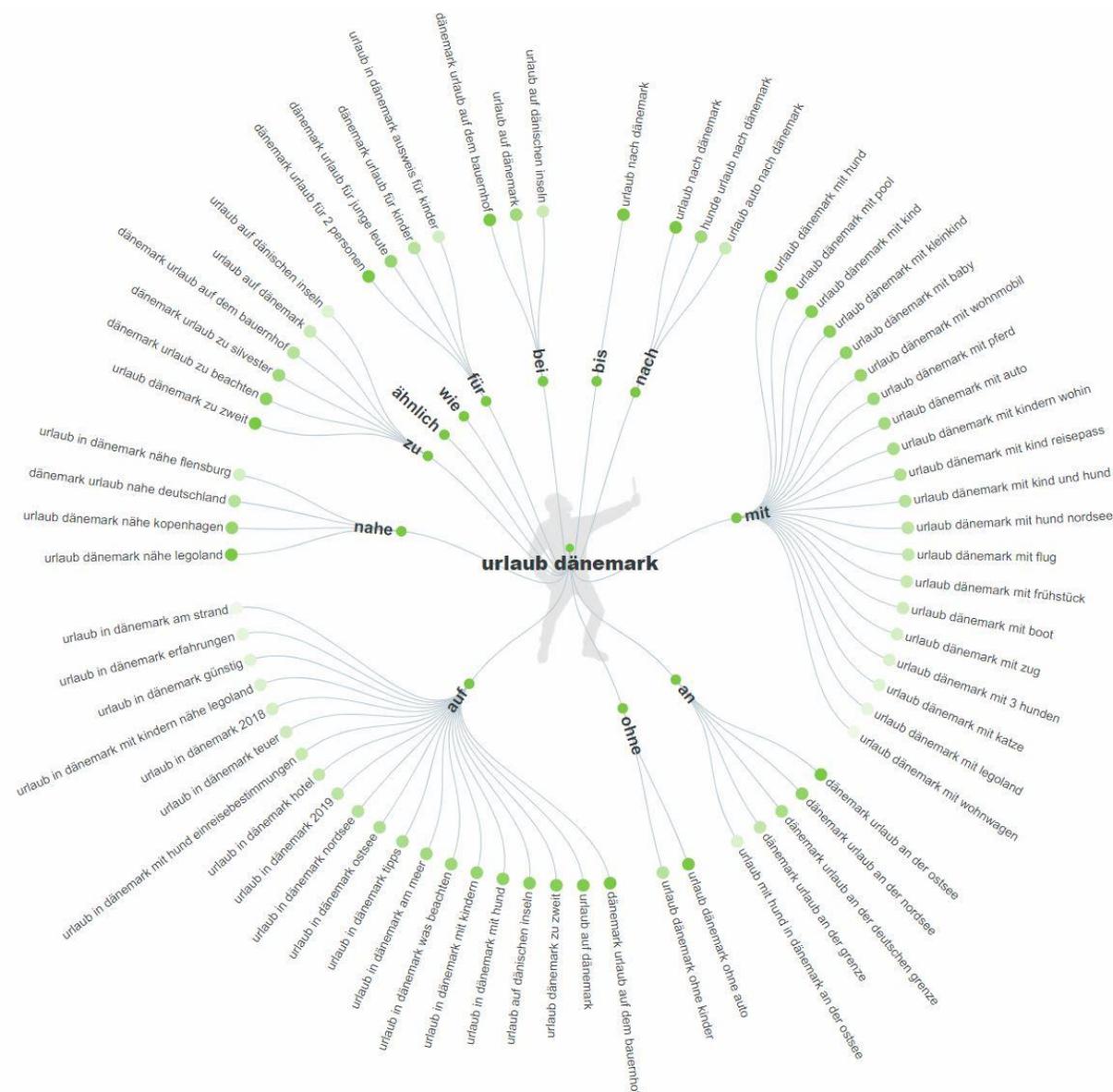
# Search Term Variations

*Urlaub in Dänemark* is a popular search term

The Germans use a number of key words/search terms when looking for information about holidaying in Denmark.

Among the most commonly used variations of the search term *Urlaub in Dänemark*, with over 100 searches on average per month, we have:

- *Urlaub in Dänemark*
- *Urlaub in Dänemark mit Hund*
- *Urlaub Dänemark Ostsee*
- *Urlaub Dänemark mit Hund*
- *Urlaub in Dänemark mit Kindern*
- *Urlaub Dänemark Nordsee*
- *Urlaub Dänemark Ferienhaus*
- *Urlaub Dänemark Kinder*
- *Urlaub Dänemark 2019*
- *Urlaub in Dänemark am Meer*



Source for picture: [www.answerthepublic.com](http://www.answerthepublic.com), accessed 8<sup>th</sup> July, 2019. Search term: "Urlaub Dänemark".  
 Source for the search volume: [adwords.google.com](http://adwords.google.com), accessed 8<sup>th</sup> July, 2019. Filters: Country: Germany, Period: Jan. - Dec. 2018

# Publicity and Visibility in the Media



# Press Releases and Newsletters in the German Media

## Trends in the Media Landscape

Lea Weber, PR & Press Manager

” *Even though the Germans' use of the media keeps evolving towards digital and social media, they are still kept informed through the classic print media and their online portals. Individual and group press tours as well as press releases are therefore a good way to increase in scale and scope at a lower cost.*

*The Germans are also very keen radio listeners, most of them on a daily basis (54 m).*

*Where special interests are concerned, it can be useful to work alongside an influencer. A lot of Germans use social media, blogs etc to gather information about their personal interests, such as fishing, cycling, holidaying with kids (mom/dad blogs). These special interest influencers are usually recruited with an invitation about an exciting programme. Well-known lifestyle or travel bloggers with a wide range of followers demand a fee for their activities.*

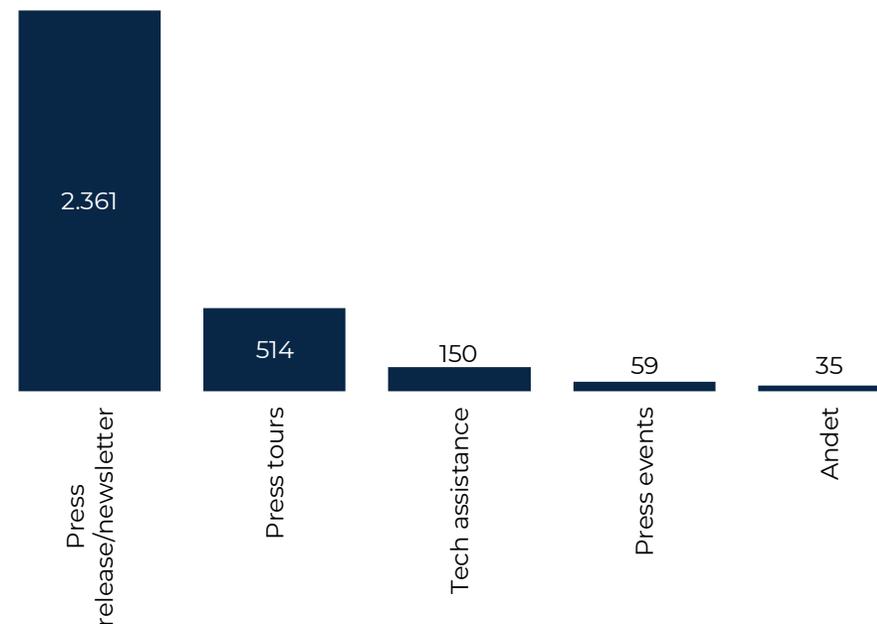
*Interesting topics for the media in Germany are, on the one side, a classic mix of nature, beaches, coasts and holiday homes with relaxation and "hygge". On the other side, journalists/influencers seek the unusual angle with local, People's stories, odd ideas and traditions, which symbolise the Danish lifestyle.*

”

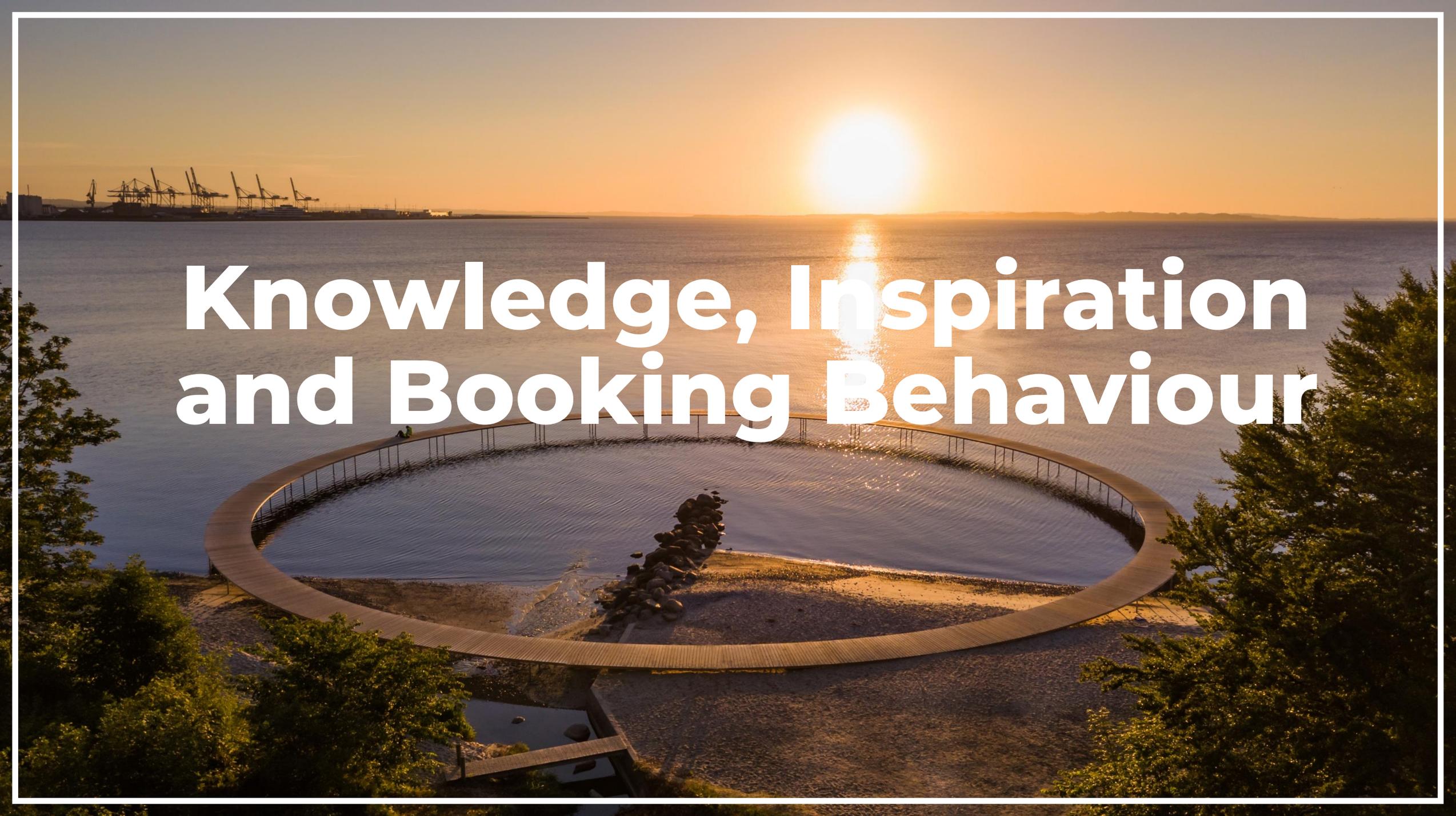
## Almost 2,400 press releases and newsletters in the German media

In 2018, VisitDenmark's press activities generated 184 posts on social media and obtained 49,253 comments, shares and likes.

Number of articles by press activities, 2018







# Knowledge, Inspiration and Booking Behaviour

# Knowledge of Denmark as a Holiday Destination

## Four out of 10 Germans are well acquainted with Denmark

38 pct. of the Germans are acquainted/very well acquainted with Denmark as a holiday destination. In Sweden, it is almost two thirds (64 pct.), whereas in Norway, it is six out of 10.

In Holland and in the UK, people know relatively little about Denmark as a holiday destination.

Well acquainted/acquainted about Denmark (focus areas):

**75%**  
Southern and Western Sweden

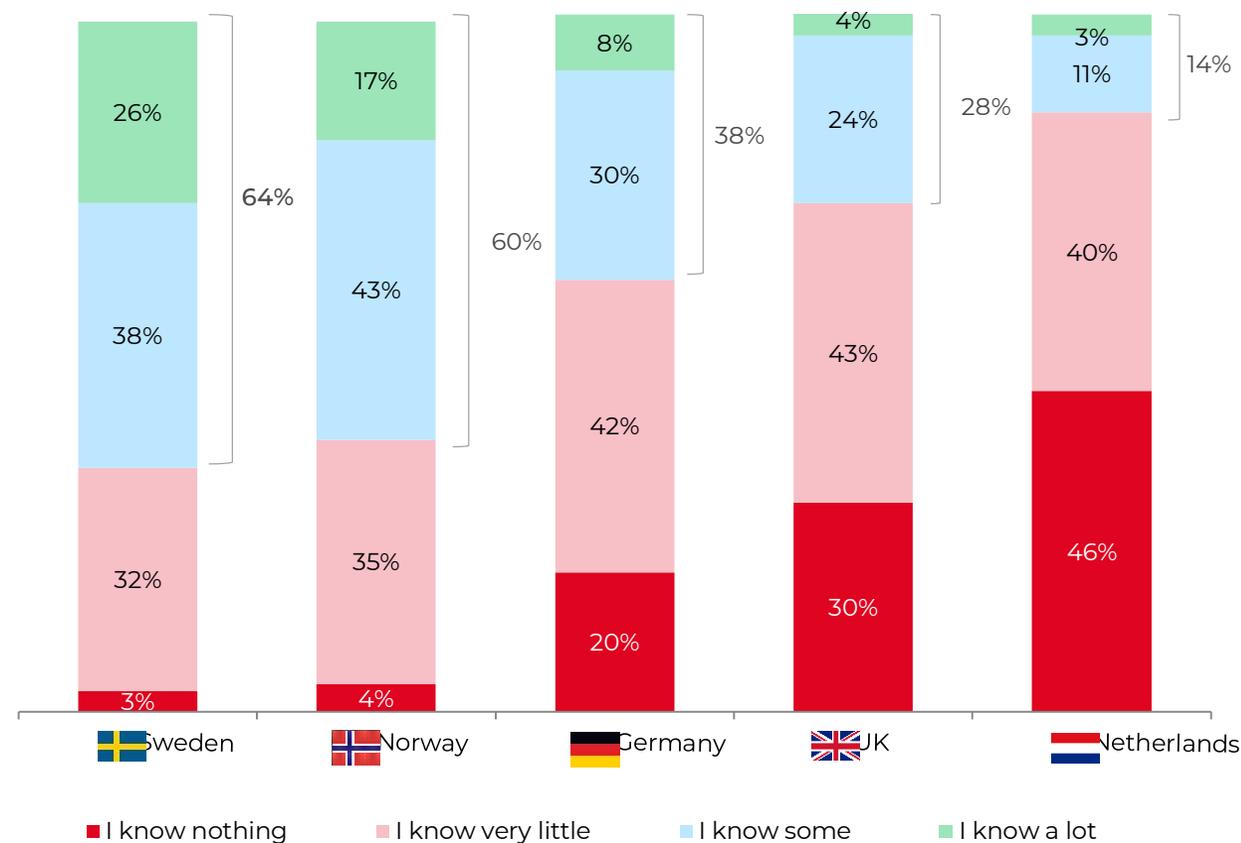
**65%**  
Southern Norway

**44%**  
Northwest Germany

**42%**  
Greater London

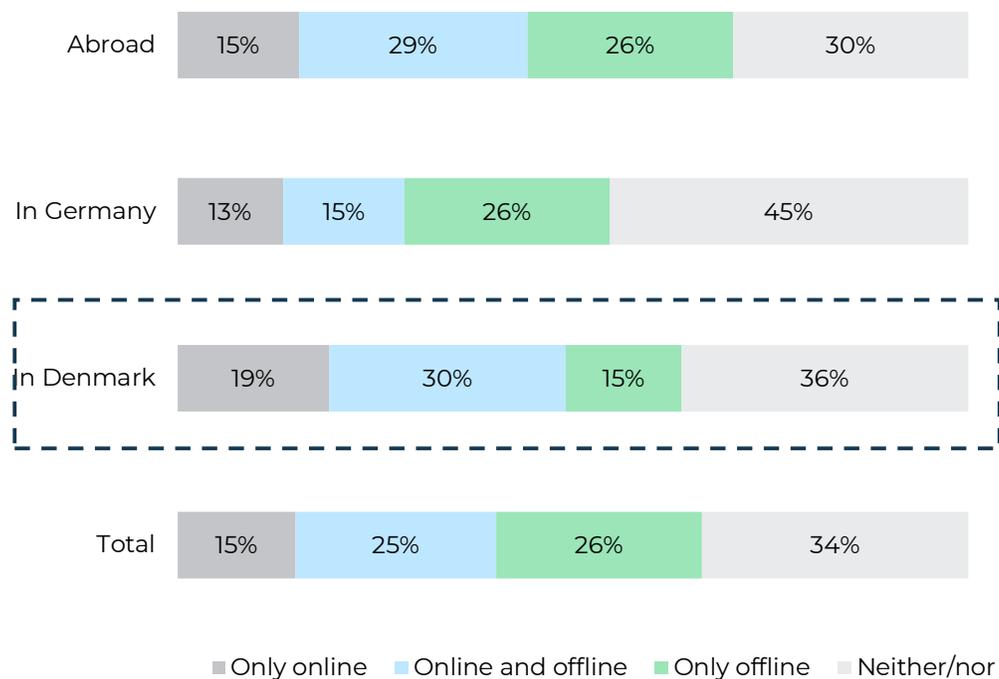
## How well do you know Denmark as a holiday destination?

(N: Netherlands = 1,503, UK = 1,508, Germany = 2,118, Norway = 805, Sweden = 807)



# Sources of Inspiration

What inspired you when you chose your holiday destination?



**Offline as well as online sources are inspirational for the Germans**

The Germans generally find that information online as well as offline inspires their choice of destination.

Overall, 26% are exclusively inspired offline, for instance by holiday magazines, brochures and advertising, whereas 15% are inspired exclusively online. 25% find that it is a mix of online and offline sources which inspire them.

Among the Germans who have already been on holiday in Denmark, the percentage inspired by a mix of online and offline sources is greater. A few more are only inspired online.

The ones replying "Neither" are usually inspired by their own experience or recommendations from people around them.

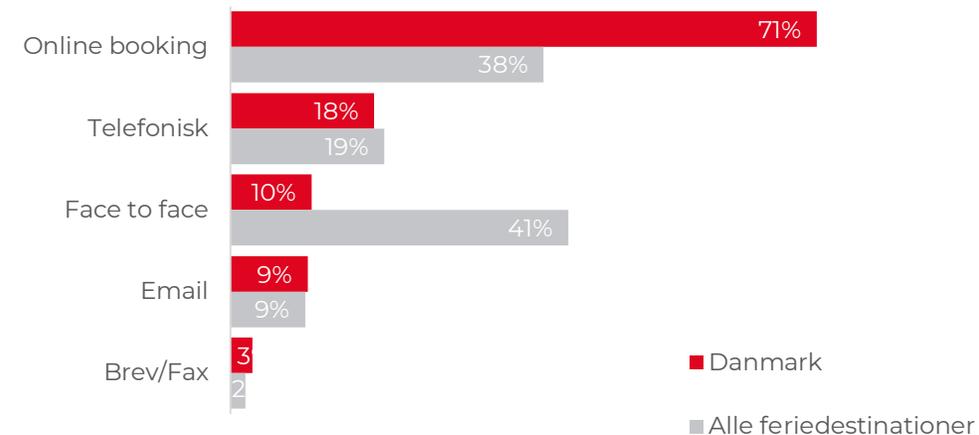
# Booking Holidays to Denmark

## Significant rise in online booking for holidays to Denmark

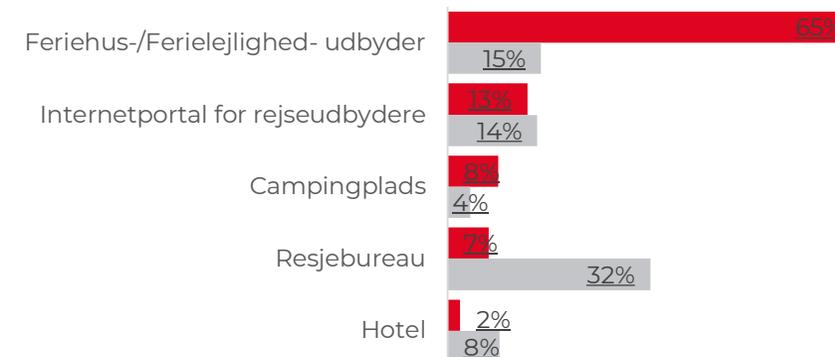
Germans on holiday in Denmark in 2017 primarily booked their holiday online. Since last year, the percentage of holidays booked online has increased significantly from 54% in 2016 to 71% in 2017. Face-to-face conversation is still preferred by Germans in general when it comes to booking holidays, followed by a rising percentage in online booking.

Danish holiday rentals are a favourite among the Germans. 65% of Germans who have been on holiday in Denmark have booked with holiday rentals. Travel agencies are another favourite among the Germans: 32% book their holiday in this way. Germans also use internet portals and camping sites when they book their holiday.

## Online-/offline-booking

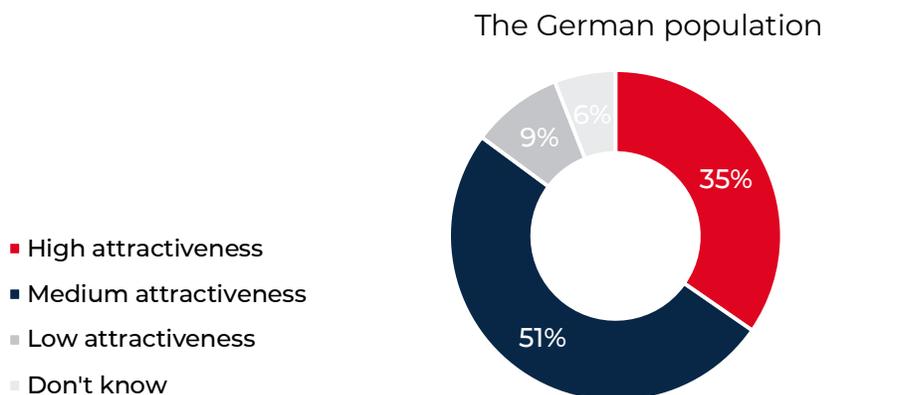


## Booking channel – Top 5

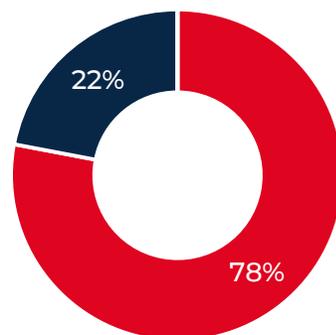


# Denmark as an Attractive Holiday Destination

How would you judge Denmark as a holiday destination?



Germans on holiday in Denmark in 2018



## Germans who have already visited Denmark are much more positive

Almost eight out of 10 Germans who have visited Denmark on holiday in 2018, find Denmark to be an attractive holiday destination. 78 pct. estimate Denmark's attractiveness to a 6 or a 7 on a scale from 1-7. 1 = not at all attractive and 7 = very attractive.

Generally, the Germans have a good impression of Denmark as a holiday destination, but they are even more positive once they have paid a visit to Denmark.

Happy guests are paramount to recommendations of Denmark, during and after their stay. Personal recommendations are often key when the Germans pick their holiday destination.

Numbers from VisitDenmark's Tourist Survey 2017 show that the majority of German guests are happy and that 77 pct. would actively recommend Denmark at their return.

# What do the Germans associate with Denmark?

**The Germans associate Denmark with nature, beaches, the sea and Copenhagen**

Menu-wise, hotdogs, cheese and butter are mentioned. Some also state that Denmark is an expensive country.

Specifically, the Germans mention 'erholung', 'ruhe' and 'entspannung'.

Angling is also an activity associated with Denmark.

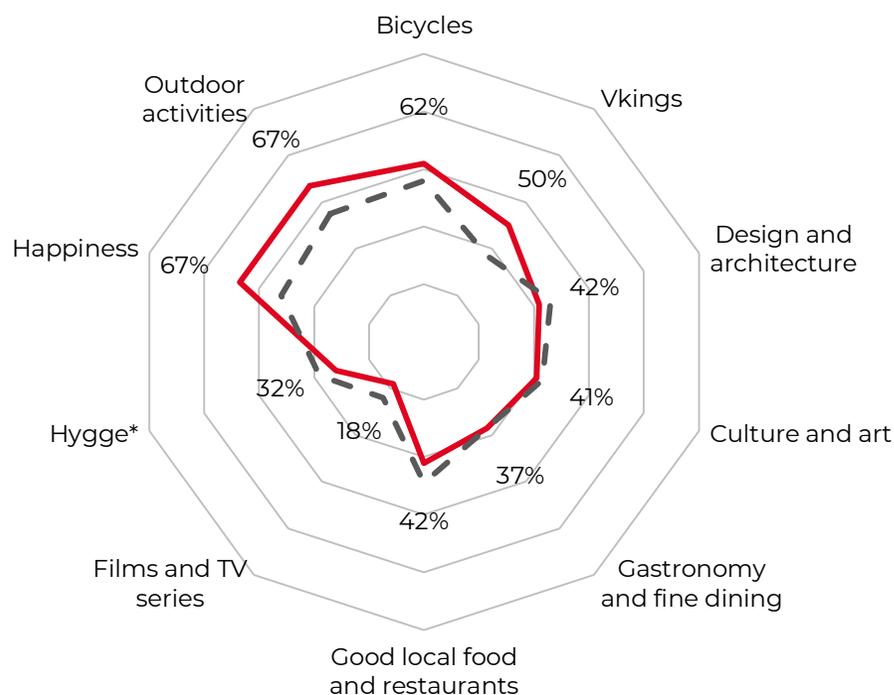
Danes are considered friendly and calm people.



# The German View on Denmark

## To what degree do you associate Denmark with the following?

The percentages include 'to a high degree' and 'to a very high degree'



\* The Danish word 'hygge' has been mentioned in questions

■ Germany  
■ Avg. (DE, NL, NO, SE, GB)

## When asked, the Germans especially associate Denmark with happiness and outdoor activities

When the German are asked directly as to which parameters they associate Denmark with the most, 'happiness' and 'nature' are mentioned in particular, in combination with outdoor activities (such as cycling, hiking or sports).

Almost a third (32 pct.) of the Germans associate Denmark with the Danish word 'hygge'.

On four of the nine parameters, the score for Germany is higher than the average score for Germany, the Netherlands, Norway, Sweden and the UK. That applies to the parameters: 'happiness', 'outdoor-activities', 'bicycles' and 'vikings'.

There is no difference in answers irrespective of whether they concern the whole of Germany or only Northwest Germany.

Compared to a similar measurement in 2018, the percentage of Germans associating Denmark with the above parameters has risen overall. Particularly noteworthy is the parameter connecting Denmark with bicycles, which has seen a significant rise from 53% in 2018 to 62% this year.

# The German view on Denmark related to selected Parameters of Sustainability

## Denmark is mainly associated with a sense of security

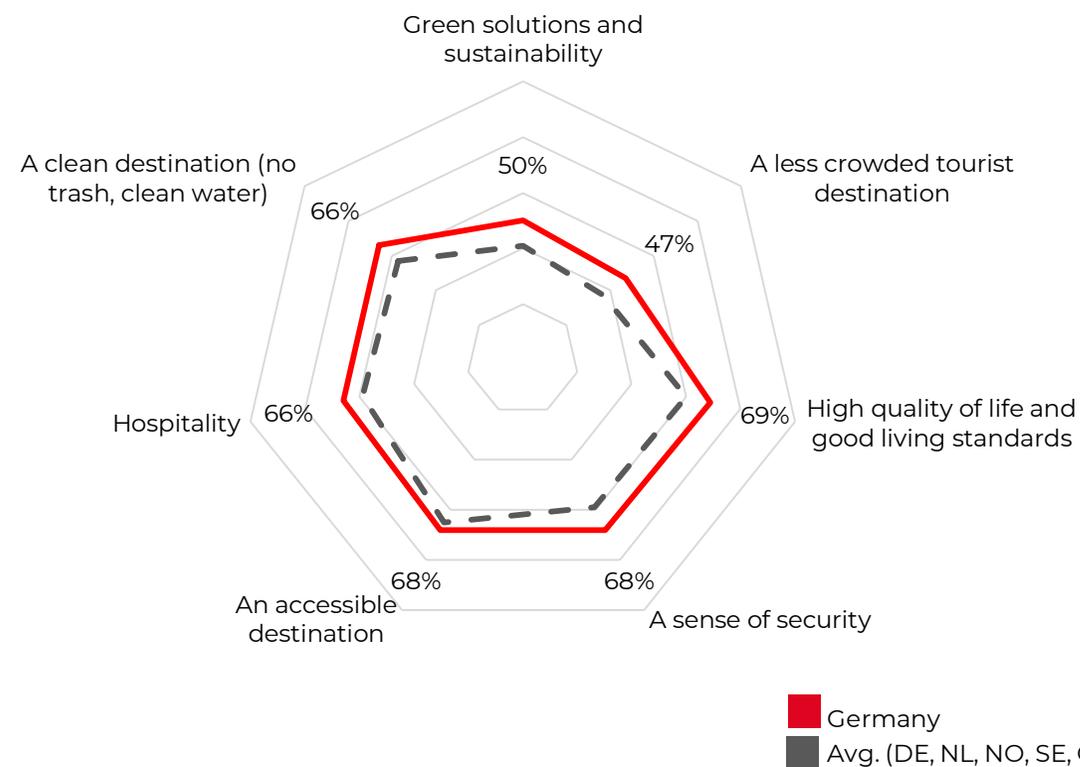
When directly asked, the Germans associate Denmark with a sense of security, a high quality of life and good living standards, an accessible destination, a clean destination (no trash and clean water) and hospitality.

Every other German associates Denmark with green solutions and sustainability.

Compared to the average, the score in Germany is higher on every parameter, except one, which is 'an accessible destination'. Here the levels are identical.

## To what degree do you associate Denmark with the following?

The percentages include 'to a high degree' and 'to a very high degree'



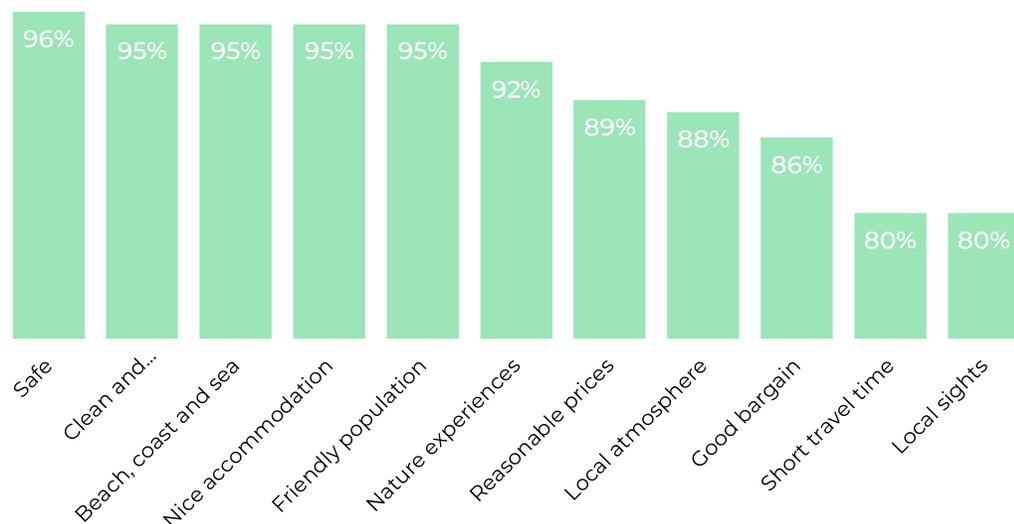
# Coastal Holidays: Sources of Inspiration and Travel Motivations

## Germans on Coastal Holiday in Denmark prioritise Safety

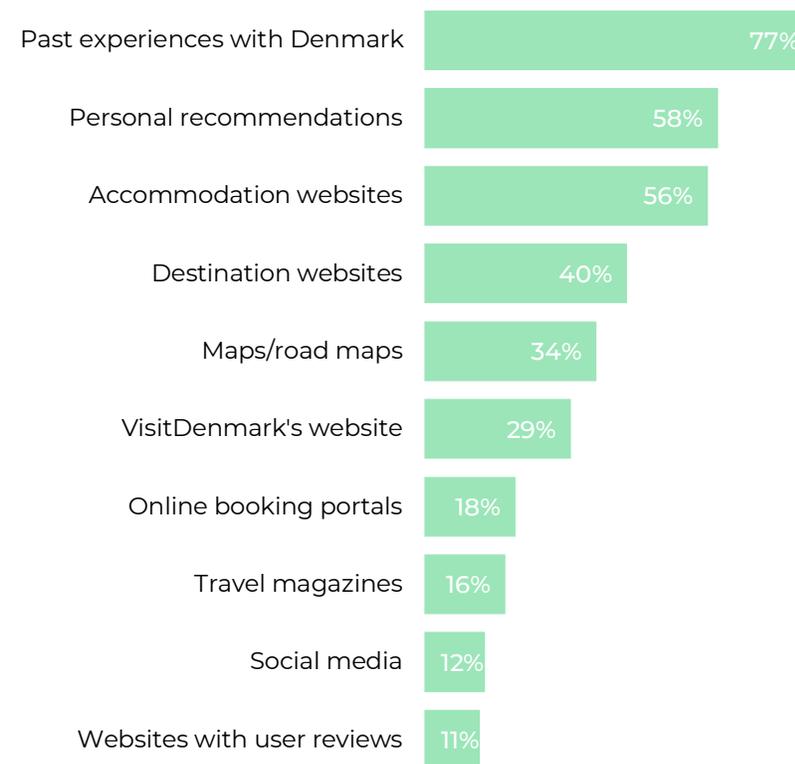
A safe destination is particularly important for the Germans, when choosing a holiday in Denmark.

Past experiences particularly affect the choice of Denmark. Personal recommendations, accommodation and destinations also play an important role.

To what degree are these motivations for your holiday in Denmark? Top 10 (percentage responding 'to a lesser degree' to 'to a crucial degree')



Have the following sources of inspiration influenced your decision to vacation in Denmark? Top 10 (Multiple possible answers)



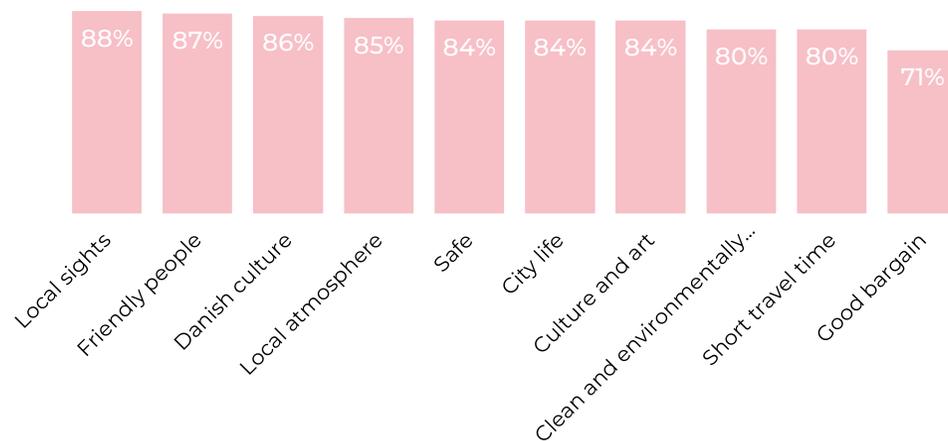
# City Breaks: Sources of Inspiration and Travel Motivations

## Germans on city breaks prioritise sights and hospitality

Local sights and attractions are important travel motivations for the Germans when choosing a city break in Denmark. Hospitality, culture and local atmosphere also play a role.

Personal recommendations in particular have influence over the Germans' choice of Denmark.

To what degree are these motivations for your holiday in Denmark? Top 10  
(percentage responding 'to a lesser degree' to 'to a crucial degree')



## Have the following sources of inspiration influenced your decision to vacation in Denmark? Top 10 (Multiple possible answers)

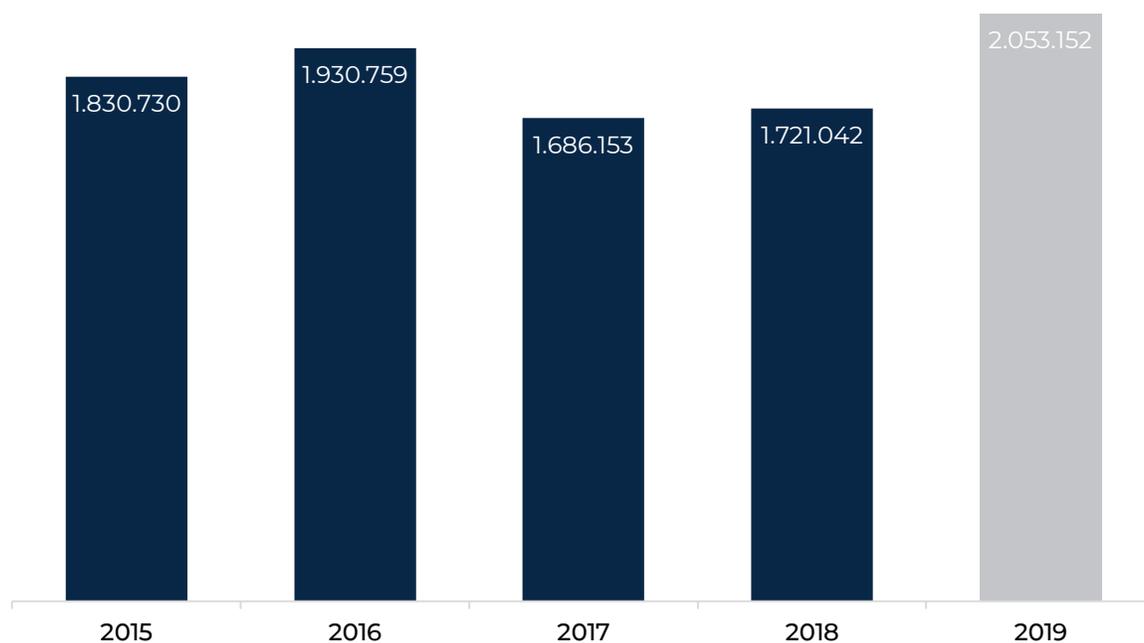




# Passengers and Flight Traffic from Germany to Copenhagen Airport

# Seating Capacity from the German Airports

**Growth in seating capacity**  
Number of seats



## Increase in seating capacity

Growth in seating capacity between German airports and CPH has been considerably volatile for the last five years. From 2015 to 2018, the average number of seats for routes from German airports to Copenhagen airport was 1.8 m.

In 2019, 2.0 m seats have been programmed, making it the highest number in the past five years.

The increase in seating capacity is in large part due to the entry of Laudamotion on routes from Düsseldorf and Stuttgart to CPH.

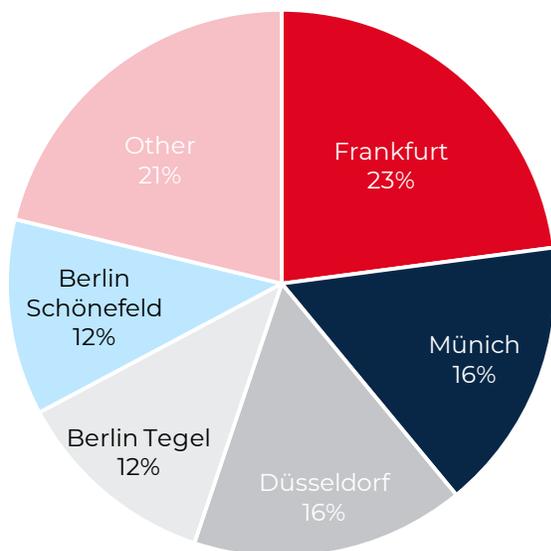
# Seating Capacity in 2019 by Airports and Airlines

## SAS provides four out of 10 seats

23 pct. of the seating capacity is to be found on the routes between Frankfurt Airport and CPH, while the largest seating capacity is to be found between the two airports in Berlin and CPH.

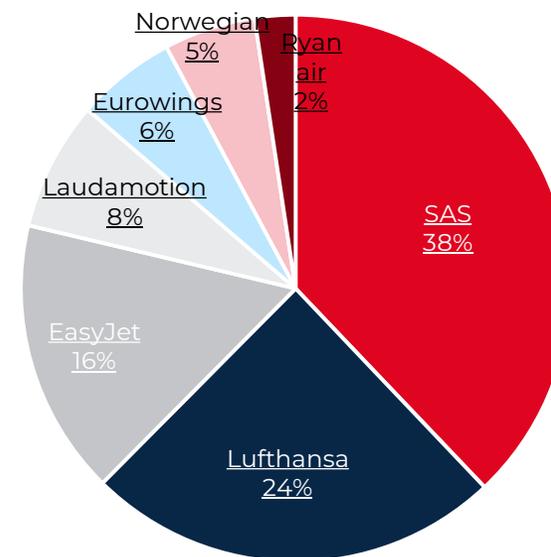
SAS and Lufthansa respectively provide 38 pct. and 24 pct. of all seats between the German airports and CPH. Laudamotion – the new operator between Germany and CPH – provides 8 pct. of all seats, from Düsseldorf and Stuttgart airports.

Seating Capacity by Airport



\* Stuttgart, Hamburg, Köln Bonn, Hannover, Nürnberg.

Seating Capacity by Airline



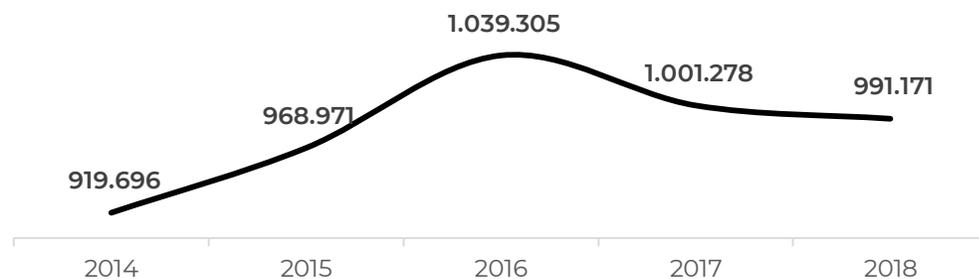
# Number of Passengers from German Airports to CPH

## Most passengers arrive during summer and autumn

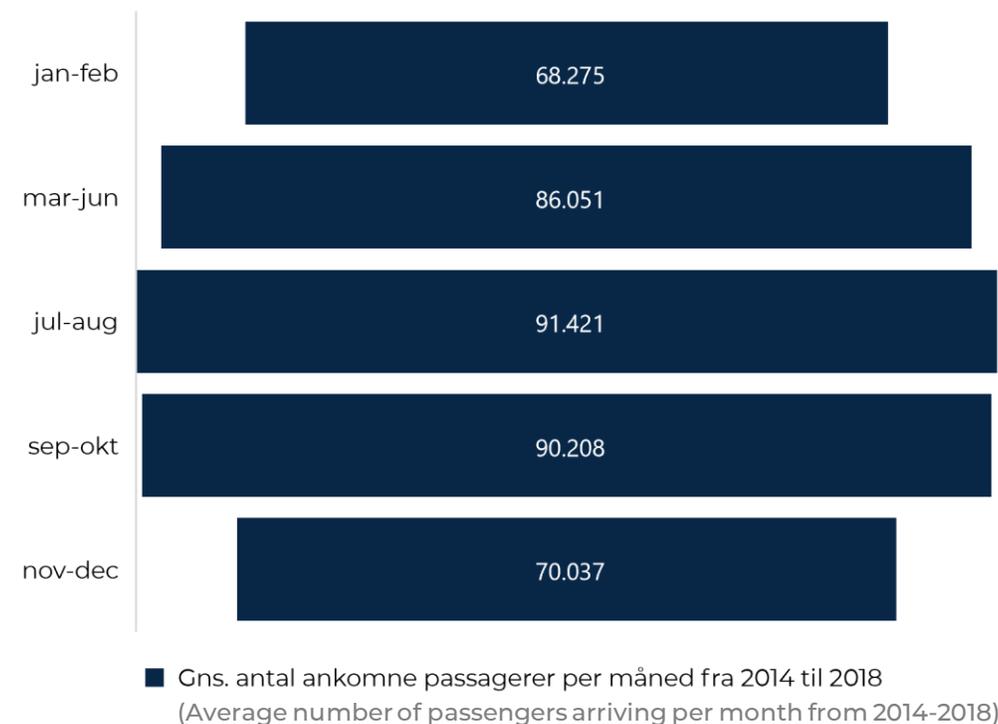
The number of passengers from German airports to CPH peaked in 2016, and has since been decreasing. In 2018 though, the numbers were higher than they were in the years prior to 2016.

Roughly the same number of passengers arrive from German airports to CPH on average per month during the high season as during the second shoulder season (September and October). Typically, fewer passengers arrive during the first shoulder season (March - June) and very few during the winter months.

Number of passengers from German airports to CPH



Number of passengers from German airports to CPH

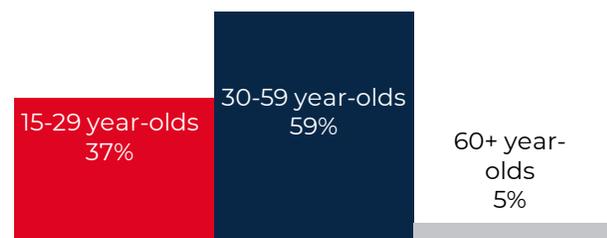


# Profile of the German Passengers

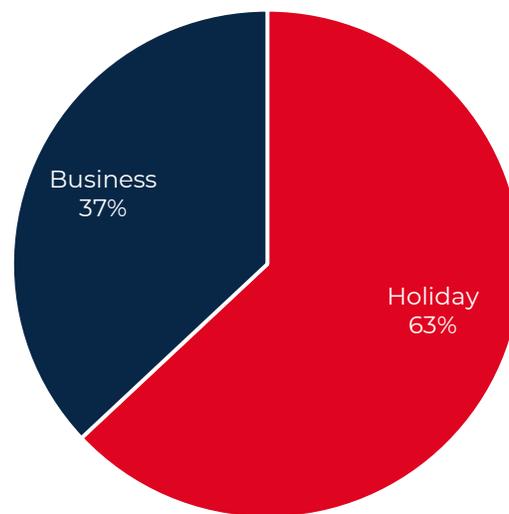
440,000 Germans in CPH in 2018



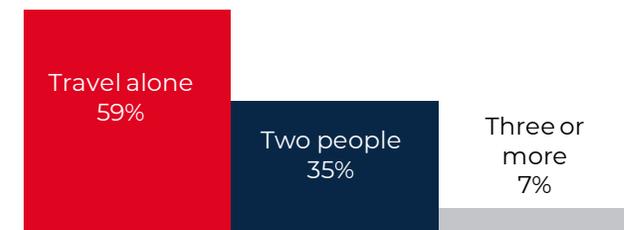
## Age



## Purpose of journey



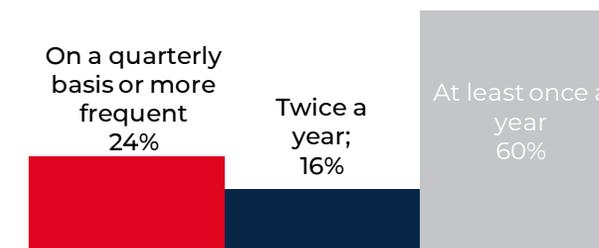
## Travel group size



## Length of stay



## Travel frequency to CPH

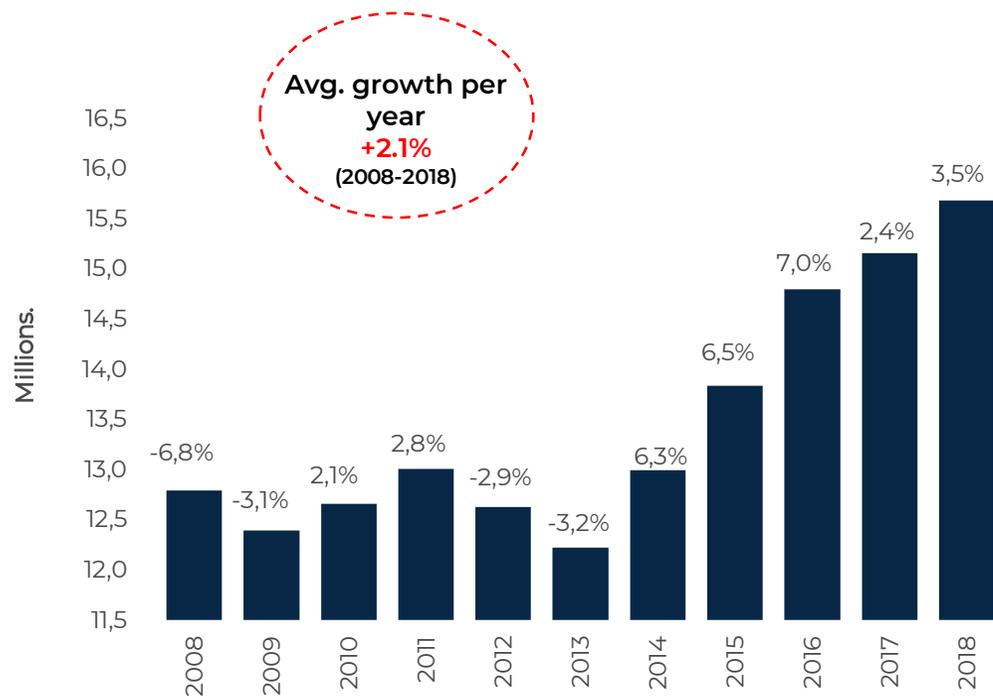


A row of fishing nets is stretched across a wooden frame on a beach. The scene is captured at sunset, with the sky transitioning from a deep purple at the top to a bright orange and yellow near the horizon. The nets are dark against the bright background, and their circular frames are visible. The foreground shows the dark, pebbly texture of the beach.

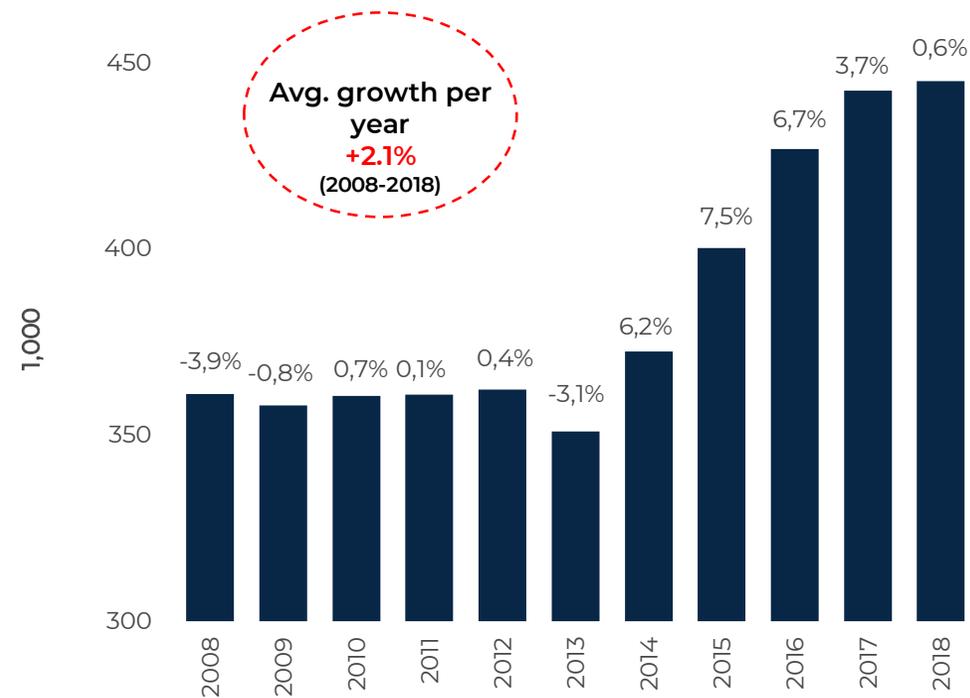
# Accommodation, Turnover and Seasonality

# Growth in German Overnight Stays and Weeks spent in Holiday Homes

**German Overnight Stays in Denmark**  
Numbers and growth compared to the year before

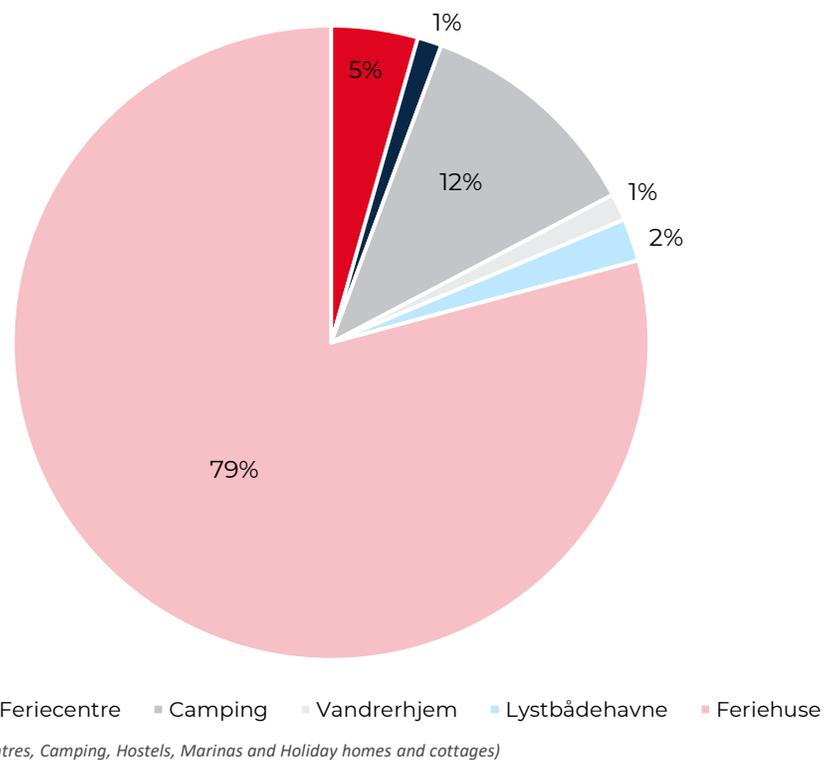


**Rented Holiday Homes to German Tourists in Denmark (weeks)**  
Numbers and growth compared to the year before

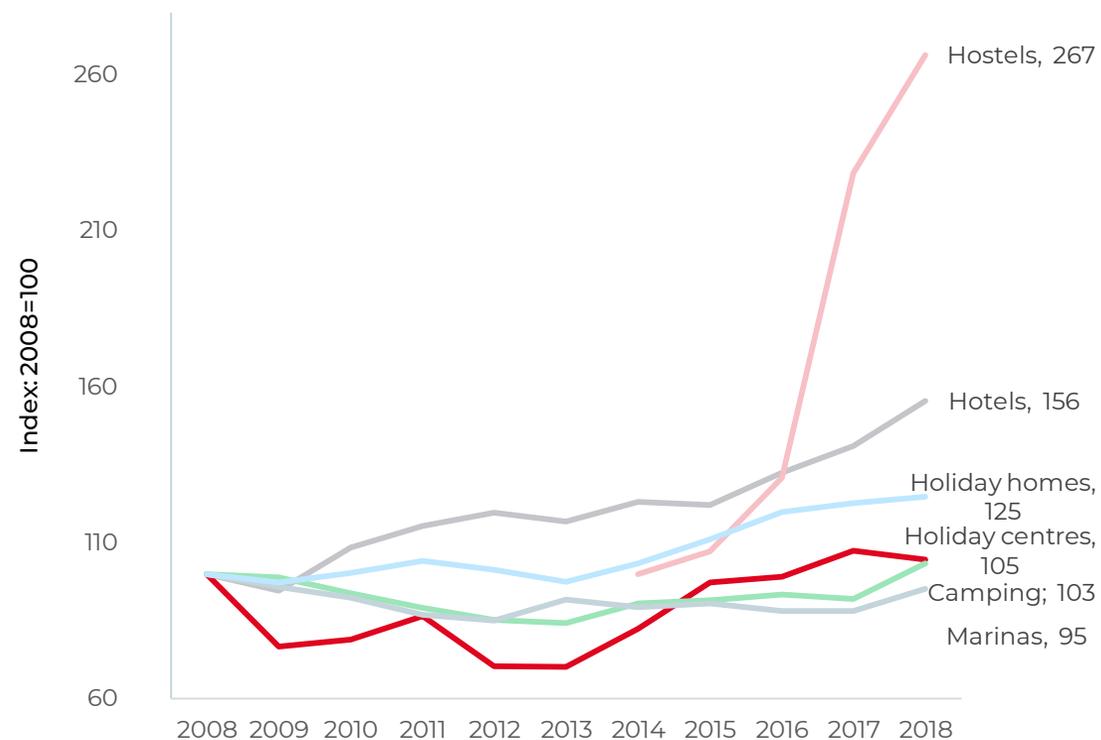


# German Overnight Stays by Accommodation Types

German Overnight Stays in Denmark, 2018



Growth in German Overnight Stays in Denmark



# German Overnight Stays Throughout the Year

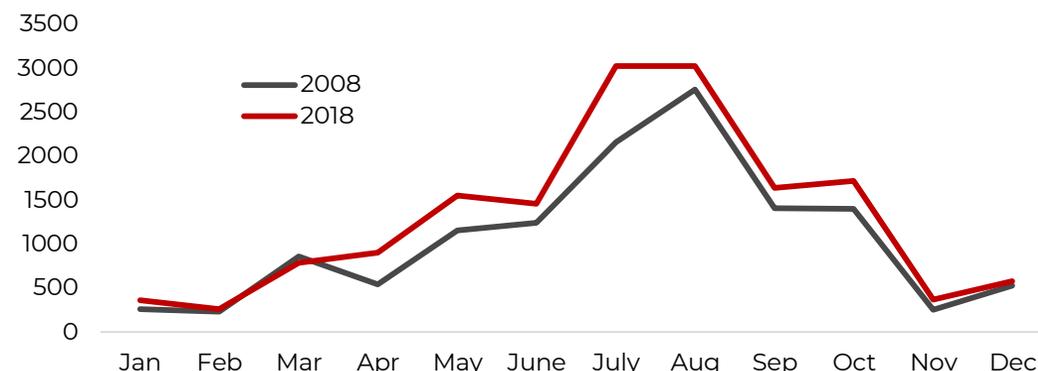
## More German overnight stays in peak as well as off-peak seasons

From 2008 to 2018, the number of German overnight stays in Denmark has increased by 23 pct. The increase is to be found all year round, during the high season, the shoulder season and the winter season.

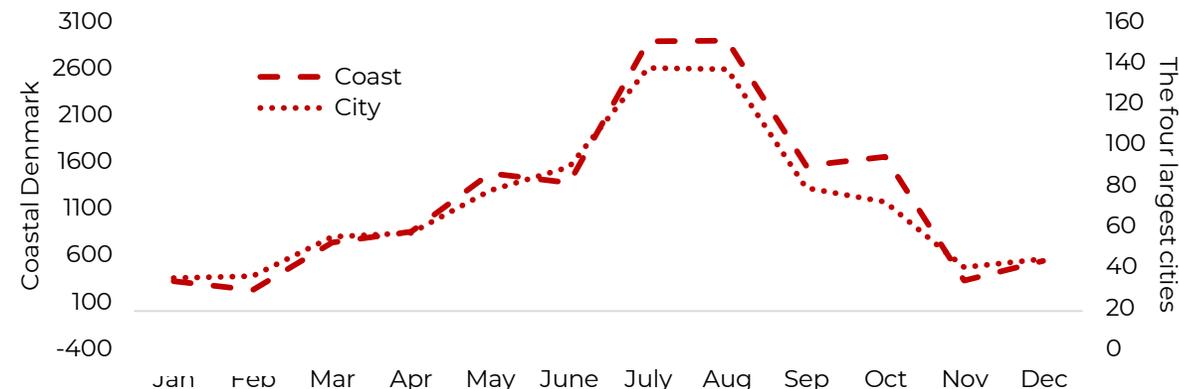
	2008	2018	2008	2018
	Number (1,000)		Index (2008=100)	
High	4,916	6,055	100	123
Shoulder	6,609	8,066	100	122
Winter	1,263	1,562	100	124
<b>Total</b>	<b>12,788</b>	<b>15,685</b>	<b>100</b>	<b>123</b>

The pattern in overnight stays among Germans on city breaks in Denmark, is – not surprisingly – different from the one regarding coastal and nature tourists. This means that the curve for city tourists' overnight stays is slightly more flattened (spread out more evenly throughout the year) than the one for coastal and nature tourists.

German overnight stays in Denmark in months (1,000)



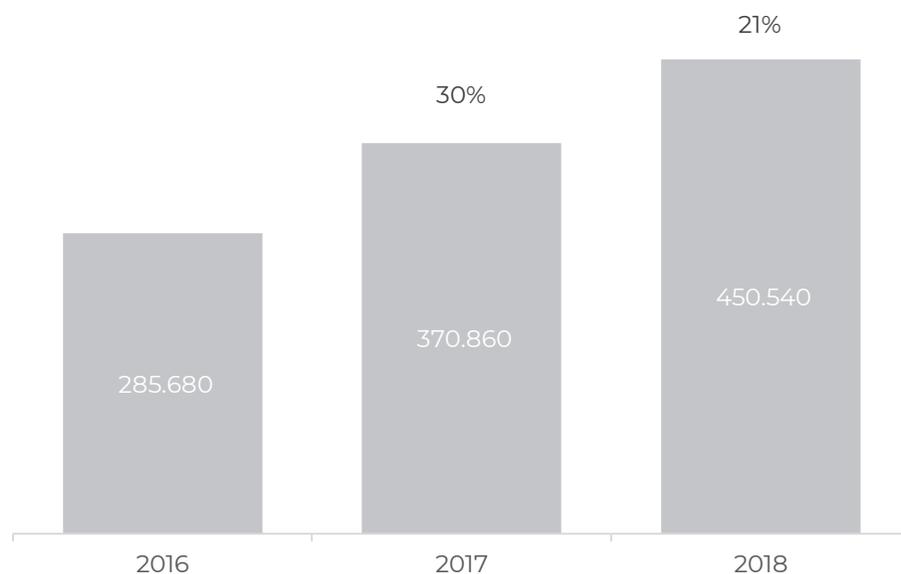
2018: German coastal and city overnight stays (1,000)



Note: High season: July-August, shoulder season: March-June and September-October, low season: January-February and November-December.

# German Overnight Stays on Sharing Economy Platforms

German overnight stays and growth compared to the year before with Airbnb



## Significantly more German overnight stays with Airbnb

Since 2016, the number of German overnight stays in Denmark with Airbnb has significantly grown.

In 2016, the number of overnight stays were barely 290,000 compared to over 450,000 in 2018, representing a growth of 58 pct.

Looking into how the number of overnight stays is distributed between cities and coastal areas, almost half of the German overnight stays take place in one of the four largest Danish cities.

German Airbnb overnight stays in 2018 distributed between coastal areas and cities as well as overnight stays in cities distributed among the four largest Danish cities

	Coast	City	København	Aarhus	Aalborg	Odense
<b>2018</b>	251,556	198,984	161,248	23,855	6,347	7,534
<b>Pct</b>	56 pct.	44 pct.	81 pct.	12 pct.	3 pct.	4 pct.

# Accommodation at Home and Abroad

	German overnight stays 2018 (1,000)	Percentage of European overnight stays	Growth from 2017 to 2018
<b>Germany</b>	386,141		+3%
Europe	417,391		+3%
The rest of the world	143,765		+4%
<b>Total</b>	<b>947,297</b>		<b>+3%</b>
France	83,430	20%	7%
Italy	60,914	15%	3%
Spain	57,491	14%	-7%
Austria	56,255	13%	5%
Croatia	19,955	5%	2%
Holland	18,940	5%	3%
Turkey	18,476	4%	24%
UK	17,857	4%	-7%
Denmark	15,564	4%	3%
Greece	14,778	4%	10%
Portugal	6,533	2%	-4%
Ireland	6,468	2%	15%
Poland	6,203	1%	7%
Czech Republic	5,877	1%	2%
Switzerland	3,869	1%	3%
Bulgaria	3,526	1%	4%
Sweden	3,126	1%	3%
Belgium	2,683	1%	11%
Hungary	2,683	1%	11%

# Tourism Turnover 2017

Market	Tourism Turnover 2017 (m DKK)	Percentage of foreign tourism turnover 2017
Total	128,037	
Denmark	73,241	
Foreign countries	54,796	
<b>Germany</b>	<b>15,206</b>	<b>28%</b>
Norway	8,106	15%
Sweden	7,407	14%
UK	3,619	7%
USA	3,403	6%
Holland	1,662	3%
France	1,457	3%
Italy	1,161	2%
China	855	2%
Spain	759	1%
Switzerland	560	1%
Belgium and Luxembourg	482	1%
Finland	434	1%
Poland	423	1%
Canada	264	1%
Japan	257	1%
India	236	0.4%
Australia	226	0.4%
Austra	202	0.4%
Russia	183	0.3%
Ireland	142	0.3%
Portugal	120	0.2%
Brazil	118	0.2%
South Korea	110	0.2%
Greece	76	0.1%
Other countries	7,329	13%

Germany	Turnover 2017 (m DKK)	Percentage
Visits with paid accommodation		
Hotel – holiday	706	5%
Hotel – business	619	5%
Holiday centre	63	0%
Camping	848	7%
Hostels	146	1%
Rented holiday homes	9,843	76%
Yacht	188	1%
Sharing Economy platforms	505	4%
Other*	77	1%
Total	12,994	81%
Visits with free accommodation		
Total	2,212	19%

Note: Visits with free accommodation include holidays with overnight stays in summer houses, rented or not, or with family/friends. Daytrips are also included.

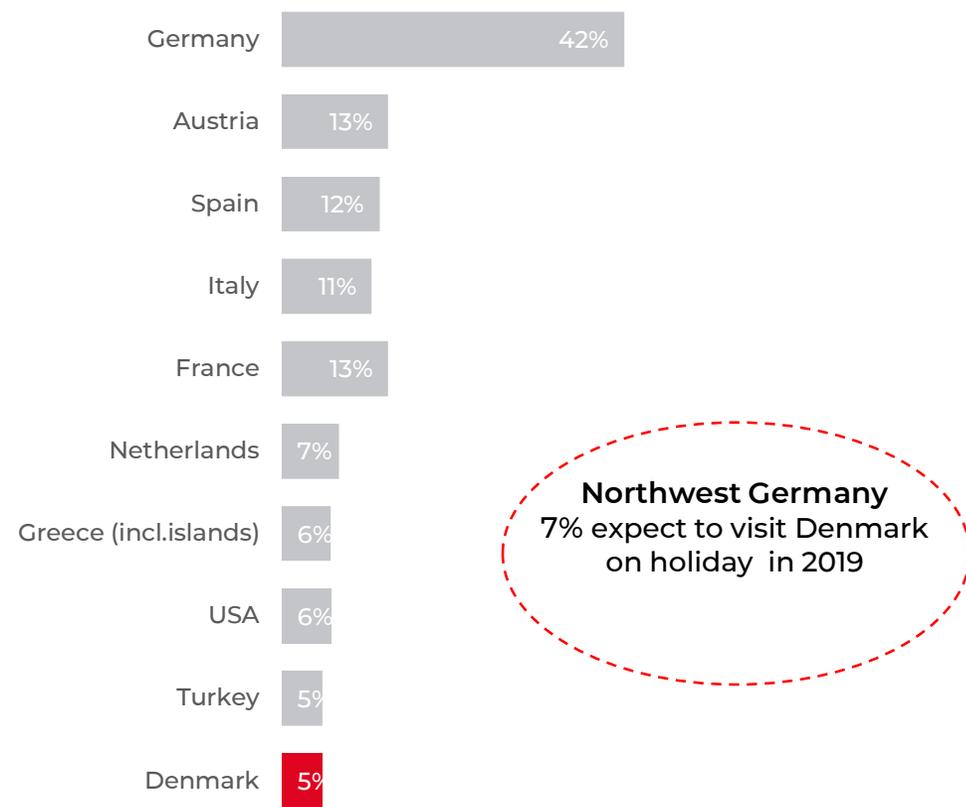
- Include festivals, cruises and farm houses
- '0' specifies values <0.05 m DKK '-' specifies the value 0.

# Market Expectations



# Expected Destinations for Germans in 2019

## Which destinations are you expecting to visit on holiday in 2019? Top 10



## The Germans are looking towards Denmark

5 pct. of the German population expect to visit Denmark on holiday within the next 12 months. That's approximately 4 million German tourists.

Denmark features in the Germans' top 10 of expected destinations. Denmark competes against southern European destinations, such as Spain, Italy and France, as well as countries such as Germany and Austria. Denmark ranks a 6, when it comes to coastal and nature holidays with children.

# Holidays 2019 / 2020

Summer Autumn Christmas Winter Easter Pentecost

	2019																															2020																																
	June					July					August					September					October					November					December					January					February					March					April					May								
Week:	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22												
Baden-Württemberg		P	P						S	S	S	S	S	S	S						A								C	C																	E	E																
Bayern		P	P						S	S	S	S	S	S							A									C	C									W								E	E															
Berlin	P	P	S	S	S	S	S	S	S											A	A								C	C									W								E	E																
Brandenburg			S	S	S	S	S	S	S											A	A								C	C																	E	E																
Bremen	P	P			S	S	S	S	S	S	S									A	A								C	C																	E	E																
Hamburg				S	S	S	S	S	S	S										A	A								C	C																						P												
Hessen					S	S	S	S	S	S										A	A								C	C	C																	E	E															
Mecklenburg-West Pomerania	P	P			S	S	S	S	S	S										A									C	C																			E	E														
Lower Saxony	P	P			S	S	S	S	S	S	S									A	A								C	C																			E	E	E													
North Rhine Westphalia		P					S	S	S	S	S	S									A	A								C	C																			E	E													
Rhineland-Palatinate					S	S	S	S	S	S										A	A									C	C																				E	E												
Saarland					S	S	S	S	S	S											A	A								C	C																				E	E	E											
Saxony						S	S	S	S	S	S										A	A									C	C																				E												
Saxony-Anhalt					S	S	S	S	S	S	S										A									C	C																						E										P	P
Schleswig-Holstein					S	S	S	S	S	S	S										A	A									C	C																						E	E	E								
Thüringen					S	S	S	S	S	S	S										A	A									C	C																						E	E									

# Denmark's Potential in terms of Business



**49%**

of the German population would like a coastal and nature holiday without children

Percentages:

**13%**  
Denmark

**50%**  
Germany



**22%**

of the German population would like a coastal and nature holiday with children

Percentages:

**15%**  
Denmark

**50%**  
Germany



**39%**

of the German population would like a city break

Percentages:

**13%**  
Copenhagen

**4%**  
Aarhus

# Interest in Visiting Denmark over the Next Three Years

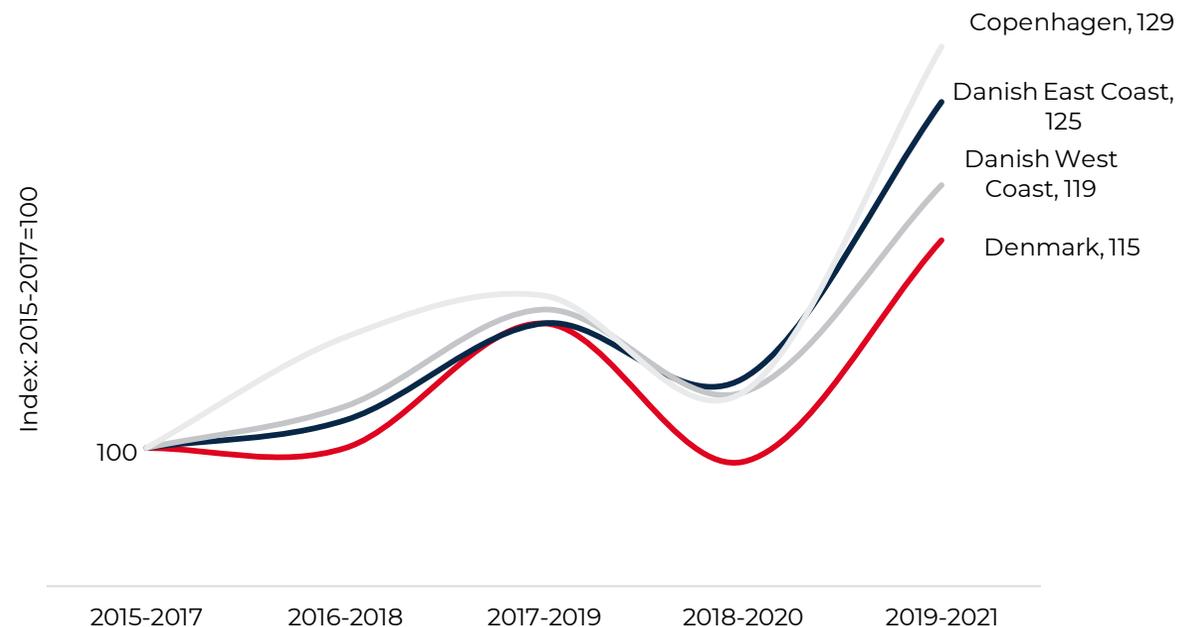
**Approximately every fifth German shows an interest in visiting Denmark over the next three years**

The percentage of Germans with an interest in going on holiday in Denmark has developed positively in the past five years.

Generally speaking, the interest in Denmark is marked among the German people – when it comes to Denmark in general, and specifically Copenhagen, as well as the West and East Coasts of Denmark.

Percentage with interest in visiting Denmark in 2019-2021	
Denmark	21.2 pct.
The Danish West Coast	22.4 pct.
The Danish East Coast	23.0 pct.
Copenhagen	14.3 pct.

**Are you planning to vacation in Denmark over the next 3 years?**



Source: *Reiseanalyse 2018 der Forschungsgemeinschaft Urlaub und Reisen (FUR)*. The results are based on people with German citizenship. The interest in Denmark is defined as the percentage who "most definitely will visit Denmark" + the ones who "consider visiting Denmark".

# Tourists in Denmark



# Residence

## German tourists in Denmark

Schleswig-Holstein	20%
Hamburg	20%
Lower Saxony	13%
North Rhine-Westphalia	12%
Berlin	5%
Bayern	4%
Baden-Württemberg	4%
Mecklenburg-West Pomerania	4%
Bremen	3%
Hessen	3%
Saxony-Anhalt	2%
Saxony	2%
Brandenburg	2%
Rhineland-Palatinate	2%
Thüringen	2%
Saarland	1%

76% come from Northwest Germany



# Coastal/Nature Tourists and City Tourists in Denmark



## The German Coastal and Nature Tourist



## The German City Tourist

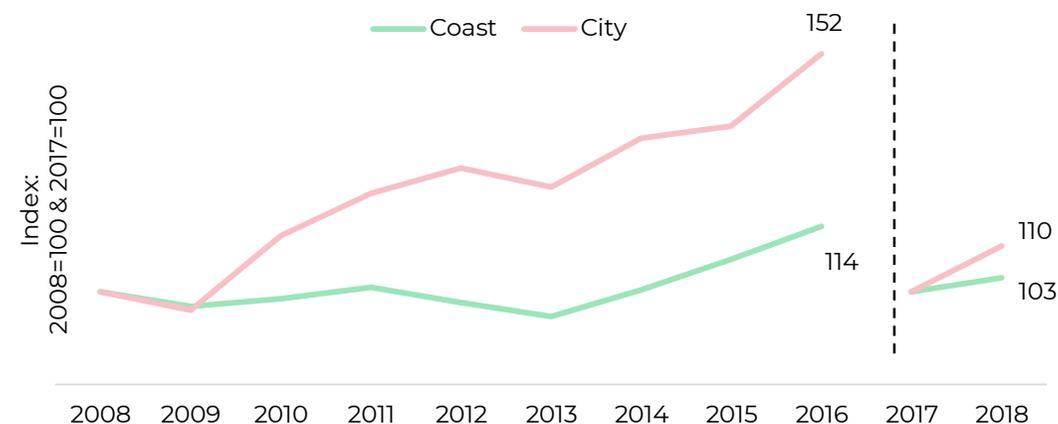
	Travel motivations	Safety, clean and environmentally friendly, beaches, coast and sea	Sights and attractions, friendly people, nature
	Activities	Walking, staying on the beach and by the sea, relaxing	Exploring the urban environment, walking, eating out
	Residence	77% come from Northwest Germany	73% come from Northwest Germany
	Transport	Arrival by car	Arrival by car, train or plane
	Tour group	2.1 people 49% travel with children	1.4 people 19% travel with children
	Accommodation	Holiday home	Hotel
	Length of stay	7.9 overnight stays, 39% have been on a one-day visit to Denmark	3.0 overnight stays 31% have been on a one-day visit to Denmark
	Daily expenses	650 DKK	1.450 kr.
	Past experience	90% have been on holiday in Denmark before	63% have been on holiday in Denmark before
	Recommendation	79% would recommend Denmark	54% would recommend Denmark

# German Overnight Stays by the Coasts and in the City

German overnight stays in Coastal Denmark  
as well as in the four largest cities

	2017 (1,000)	2018 (1,000)	Gwth.
Coastal Denmark*	14,382	14,829	+3.1%
The four largest cities*	777	855	+10.0%
<b>Total*</b>	<b>15,159</b>	<b>15,684</b>	<b>+3.5%</b>

Growth in German overnight stays\*  
by the coasts and in the city



Note.: Before 2017, accommodation in holiday homes were included in the coastal area. From 2017, this type of accommodation is determined locally. In this way, it is possible to have a more faithful representation of the distribution between coastal areas and cities. The growth prior to 2017, is hence not comparable to 2017 and onwards.

# German Accommodation in the Four Largest Danish Cities

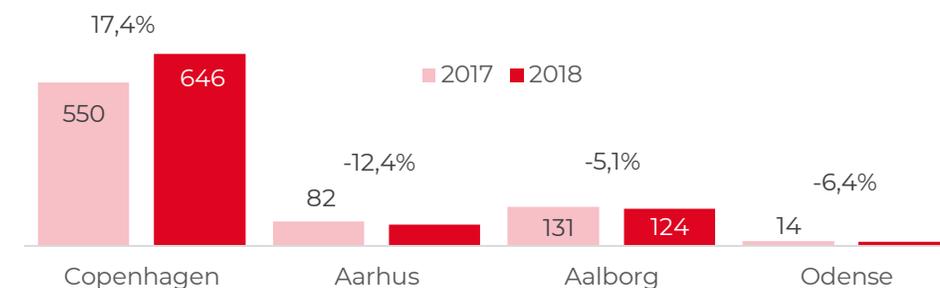
Total number of overnight stays in the four largest cities\*

	Overnight stays (1,000)	Percentage of Total	Percentage of foreign overnight stays
Denmark	5,412	43%	
Foreign countries	7,155	57%	
<b>Germany</b>	<b>854</b>	<b>7%</b>	<b>12%</b>
Sweden	744	6%	10%
UK	719	6%	10%
USA	712	6%	10%
Norway	692	6%	10%
Italy	325	3%	5%
Holland	248	2%	3%
France	248	2%	3%
China	182	1%	3%
India	92	1%	1%
Other countries	2,335	19%	33%
<b>Total</b>	<b>12,564</b>	<b>100%</b>	<b>100%</b>

Overnight stays (1,000)

	Copenhagen	Aarhus	Aalborg	Odense
Denmark	3,621	820	594	378
Foreign countries	6,276	350	388	137
USA	686	12	8	6
Sweden	670	33	25	16
UK	667	28	12	12
<b>Germany</b>	<b>646</b>	<b>72</b>	<b>124</b>	<b>13</b>
Norway	485	65	132	10
Italy	307	9	3	5
France	235	8	3	3
Holland	201	25	14	8
China	167	6	2	8
India	85	4	1.2	0.6
Other countries	2,128	88	64	55
<b>Total</b>	<b>9,897</b>	<b>1,170</b>	<b>982</b>	<b>515</b>

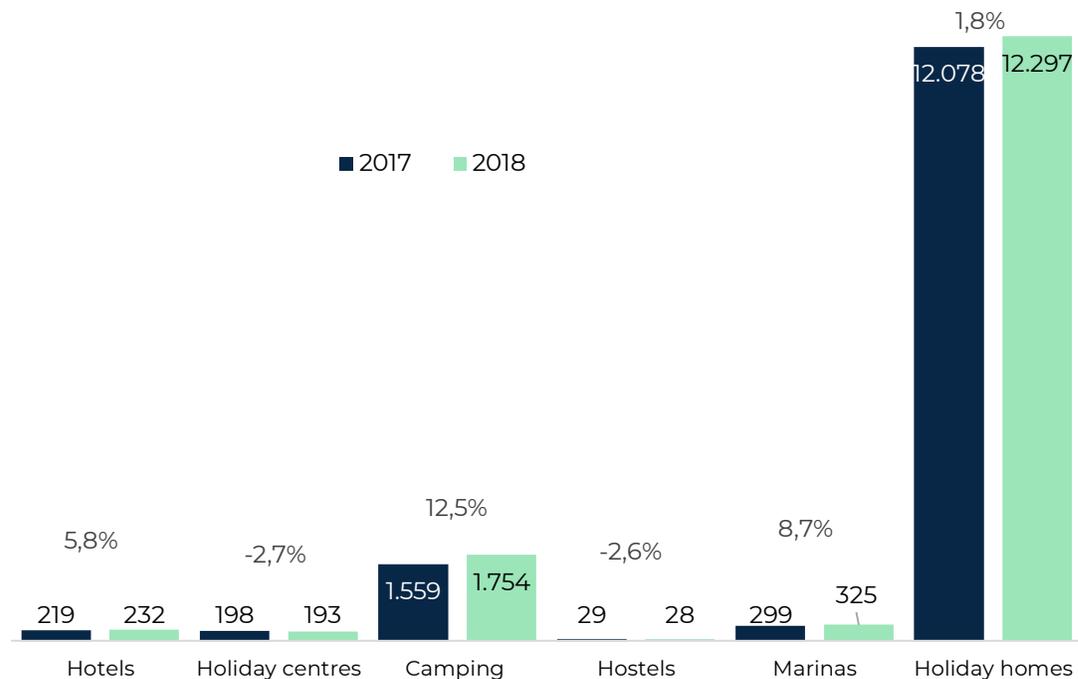
Growth in German overnight stays in cities  
(1,000)



# German Accommodation in Coastal Denmark

	Overnight stays (1,000)	Percentage of total	Percentage of foreign overnight stays
Denmark	20,879	51%	
Foreign countries	20,420	49%	
<hr style="border-top: 1px dashed black;"/>			
<b>Germany</b>	<b>14,829</b>	<b>36%</b>	<b>73%</b>
Norway	1,643	4%	8%
Holland	1,102	3%	5%
Sweden	1,084	3%	5%
UK	162	0%	1%
USA	75	0%	0%
France	60	0%	0%
China	53	0%	0%
Italy	52	0%	0%
India	12	0%	0%
Other countries	1,348	3%	7%
Total	41,299	100%	100%

Growth in German overnight stays in Coastal Denmark  
by accommodation types\*  
(1,000)





# Knowledge Centre on Tourism in Denmark

[www.visitdenmark.dk/corporate/videncenter](http://www.visitdenmark.dk/corporate/videncenter)

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