

Market Profile 2019

France

07/10/2019

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 for Danish tourism in a number of markets.

See all our market profiles here:

www.visitdenmark.dk/corporate/videncenter/markedsp profiler

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A scenic view of the St. Paul Cathedral in Minneapolis at sunset. The cathedral's large dome is the central focus, with the sun setting behind it, creating a warm, golden glow. In the foreground, a fountain with multiple jets of water is illuminated. To the left, a large wooden sailing ship is docked. In the bottom right, a small boat with people is on the water, silhouetted against the sunset. The overall atmosphere is peaceful and picturesque.

Key Data and Target Groups

Key Data: Accommodation, Expenses and Turnover

310,000
overnight stays in 2018

42,800
additional overnight stays compared to
2017

16. pct.
increase in overnight stays compared to
2017

1.5 m DKK
in Tourism Turnover in 2017

5%
of the French are well acquainted with
Denmark as a holiday destination

Expected growth
4-6 %
in number of overnight stays in 2019



Coastal and Nature Tourism

60,000
overnight stays*

8.9%
growth compared to 2017



City Tourism

250,000
overnight stays*

18.0%
growth compared to 2017

1.6 people
tour group

3.4 nights
length of stay

1,700 DKK
daily expenses

The French Target Groups

The French travel as couples as well as with children under the age of 12

Young people: 25-35 year-olds



Friends
Couples
Couple friends

Couples: 35-55 year-olds



Friends
Couples
Couple friends

Couple: 30-45 year-olds with kids (0-12)



Family

Residence



Household income



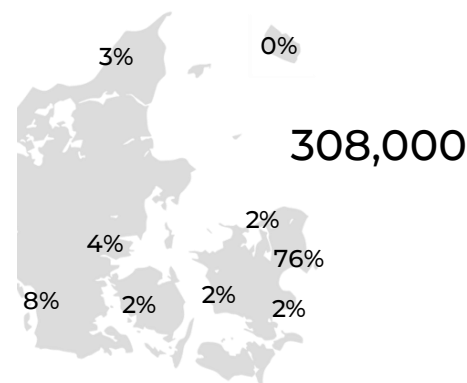
- High
- Medium
- Low

Education

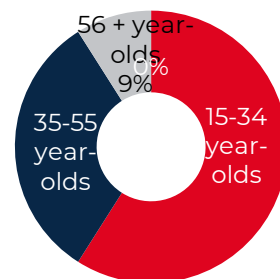


- High
- Medium
- Low

French overnight stays by regions *



French city tourists in Denmark



Functional necessities



- Weekend getaway or a long weekend to a city
- Direct flight
- Simple holiday planning
- Been on other city breaks and want to try something new

Emotional necessities



- Quality time with loved ones
- Recreation as well as experience
- Social recognition for choosing this destination
- Personal recommendation
- Safe destination

What makes Denmark unique



- Destination with authentic experiences
- Royal experiences, Danish food specialities, authenticity and architecture
- Nordic lifestyle and culture, safe bike city, green areas and harbour baths

The Digital Journey



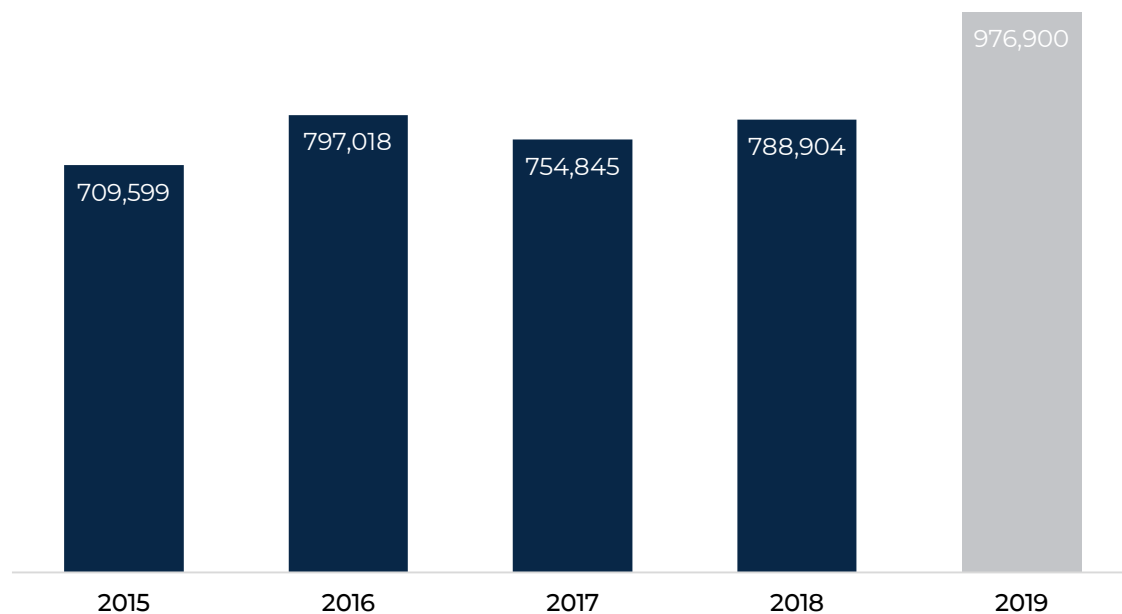
- Dreaming: 2/3 are influenced by the internet
- Inspiration: 3/10 use visitdenmark.fr
- Planning: 4/10 use websites from the respective destinations
- Booking: 2/3 book 1 month ahead of departure
- On-site planning: 1/3 use the internet
- Loyalty: 1/4 will return



Passengers and Flight Traffic from France to Copenhagen Airport

Seating Capacity from the French Airports

Growth in seating capacity
Number of seats



Seating capacity rises 24 pct.

In 2019, the number of seats is set to increase significantly, up 24 pct. compared to the number of implemented seats from 2018. The seating capacity will hereby surpass the historically highest level of 2016.

Historically, the implemented seating capacity has been somewhat volatile. From 2015 to 2018, there was an average of approximately 760,000 seats on the routes from the French airports to Copenhagen Airport.

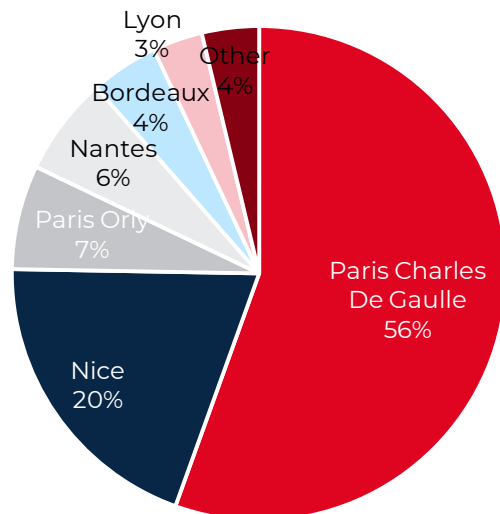
Seating Capacity in 2019 by Airports and by Airlines

Paris Charles De Gaulle provides over half of the entire seating capacity

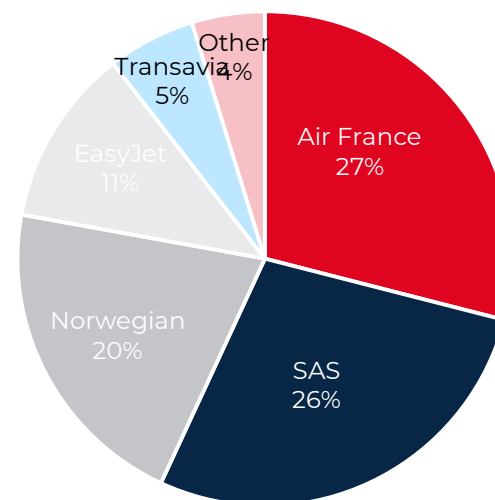
The seats on the routes between the two Parisian airport (CDG and ORY) make up 63 pct. of all seats between France and CPH. Next in line is Nice airport with 20 pct. of all seats.

National operators Air France and SAS provide the majority of seats (53 pct. in total) between French airports and CPH. Low Cost airlines such as Norwegian, EasyJet, Transavia, Vueling and Ryanair provide the remaining part.

Seating Capacity by Airport



Seating Capacity by Airline



* Other airports: Montpellier, Toulouse, Bastia, Biarritz and Marseille.

** Other airlines: Vueling and RyanAir.

Number of Passengers from French Airports to CPH

Number of passengers from France is on the rise

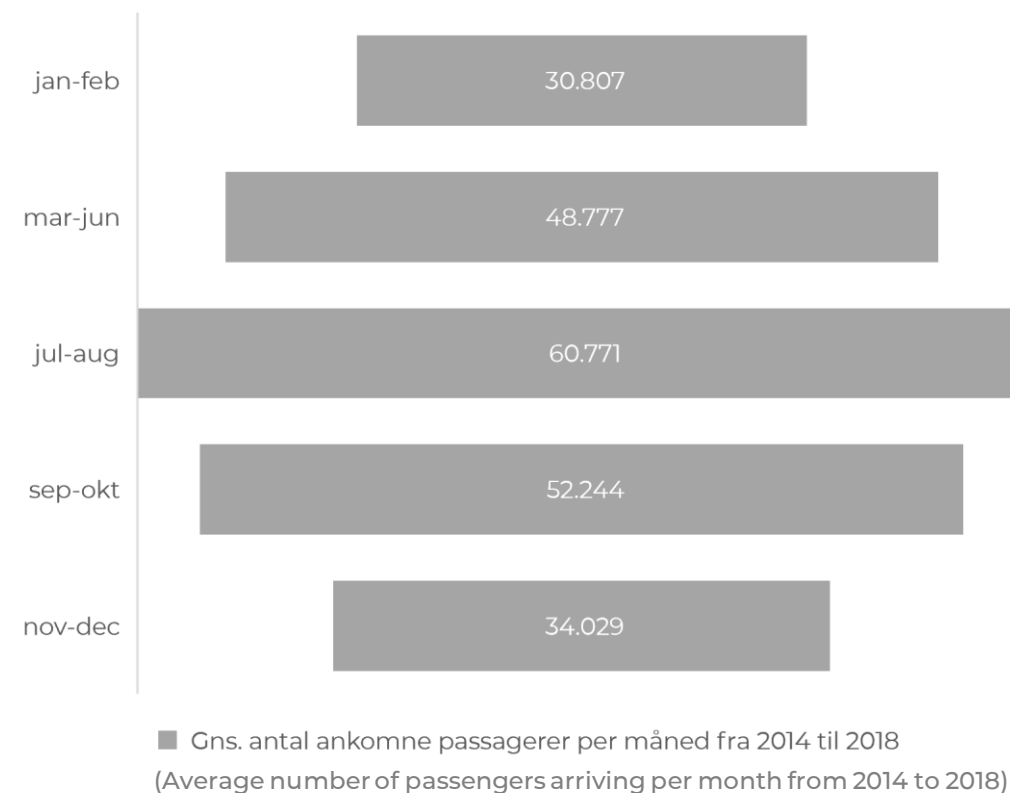
In 2018, more than 600,000 passengers arrived from the French airports to CPH - 3.7 pct. more than in 2017. This makes it the fourth year in a row in which the number of passengers from French airports to CPH has increased. In 2018, there was an increase of 25 pct. in passengers from France, compared to 2014.

In the past five years, the average number of passengers per month from France to CPH has peaked during the high season.

Number of passengers from French airports to CPH



Number of passengers from French airports to CPH

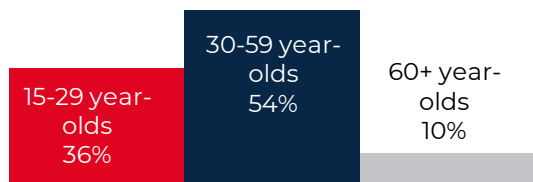


Profile of the French Passengers

256,000 French people in CPH in 2018



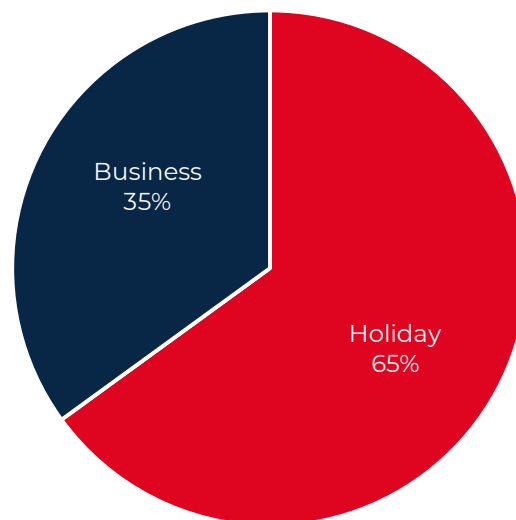
Age



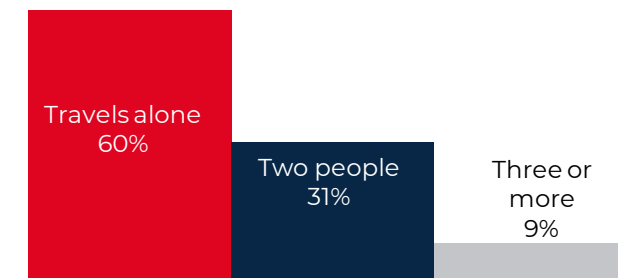
Length of stay



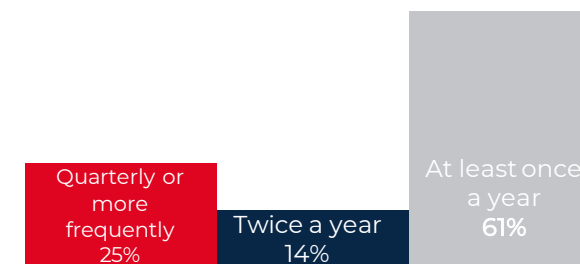
Purpose of journey



Travel group size



Travel frequency to CPH

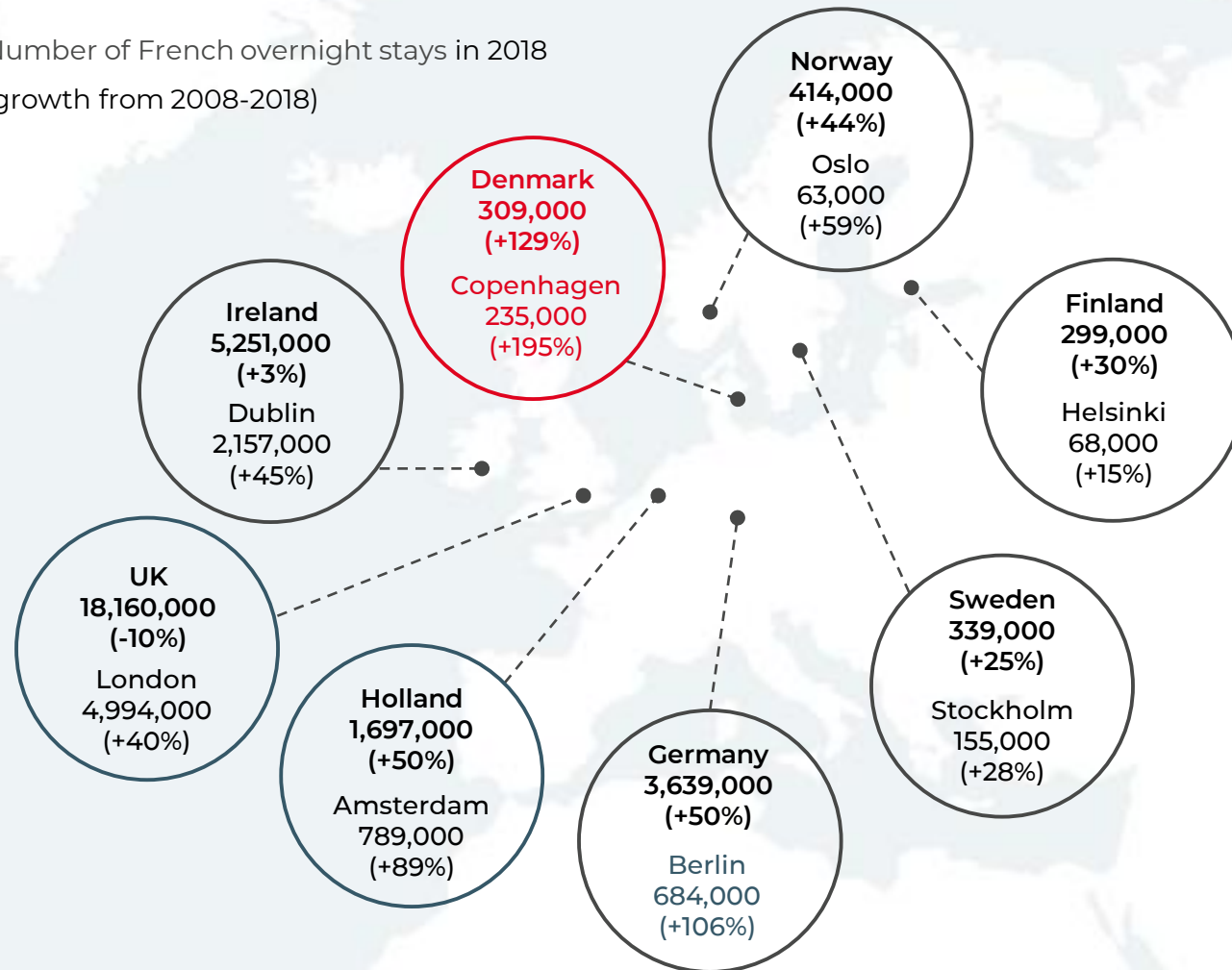


A row of fishing nets hanging on a wooden frame against a sunset sky. The nets are silhouetted against the vibrant colors of the sunset, which transitions from a deep purple at the top to a bright orange near the horizon. The nets are arranged in a line, and their mesh structure is clearly visible. The overall scene is serene and evokes a sense of traditional fishing practices.

Accommodation, Turnover and Seasonality

French Overnight Stays in Northern Europe

Number of French overnight stays in 2018
(growth from 2008-2018)



Growth in French overnight stays

Denmark takes pole position for growth, up 129 pct., when it comes to French overnight stays in the period 2008 to 2018.

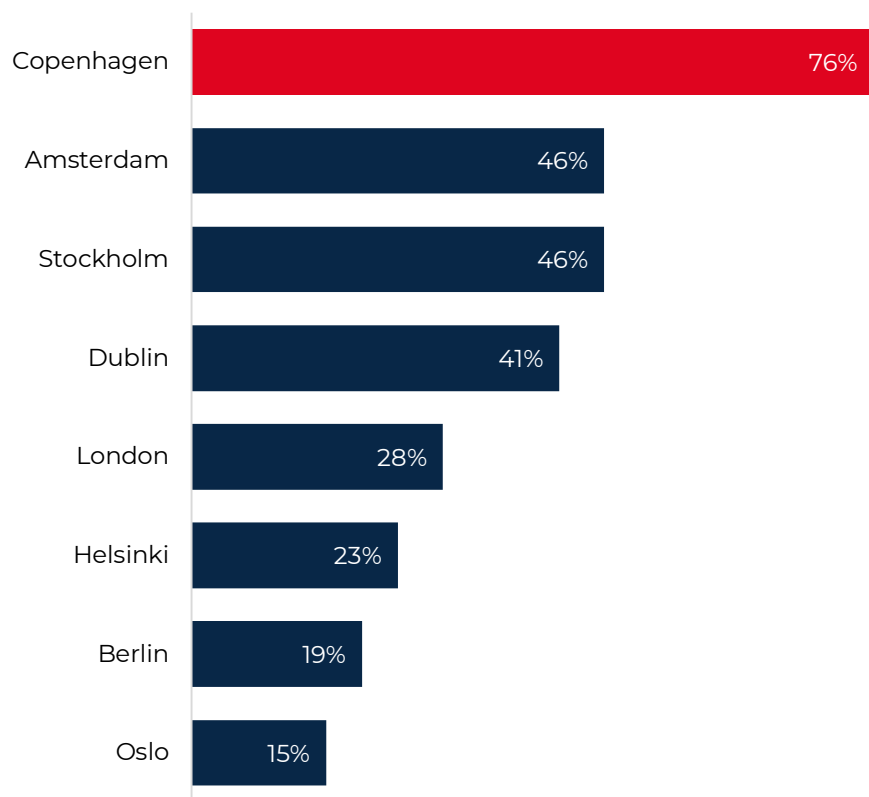
Denmark takes 22 pct of the Nordic market in terms of overall French overnight stays. In 2018, Copenhagen alone accounted for 45 pct. of all French overnight stays in Nordic cities, hosting 235,000 overnight stays.

If you look at the entire European competitive field, then Germany, Holland, UK and Ireland have significantly more French overnight stays, but none of these countries has seen growth rates quite like the Danish ones.

Overnight Stays in the Capitals of Northern Europe

French overnight stays in the capitals of Northern Europe in 2018

Percentage of the total number of overnight stays in the respective countries



Copenhagen accounts for 76 pct. of all French overnight stays in Northern European capital cities

Within the Northern European competitive field, there is considerable variation between the number of French overnight stays each capital attracts.

Copenhagen is at the very top. In comparison, Stockholm accounts for 46 pct. of French overnight stays in Sweden.

The numbers indicate that Denmark has considerable untapped potential for French tourism outside of Copenhagen.

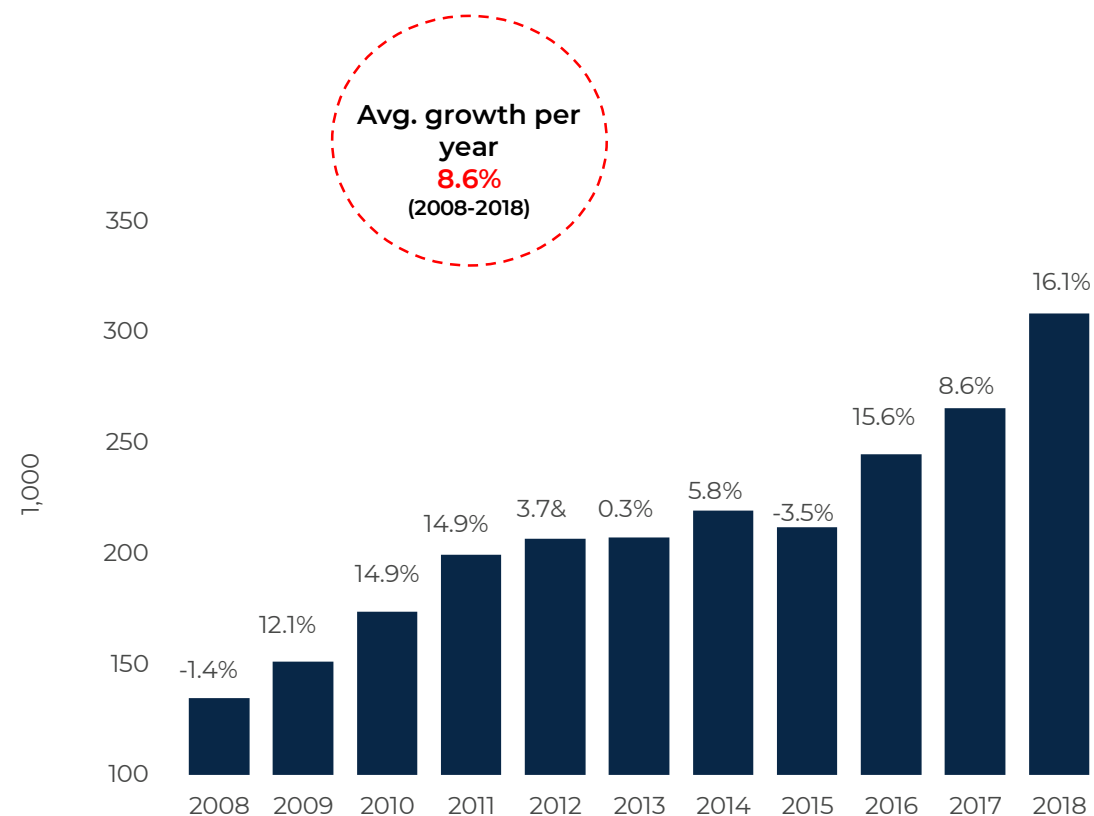
Growth in French Overnight Stays

High growth in the number of French overnight stays in Denmark

In 2018, the French spent 308,000 nights in Denmark.

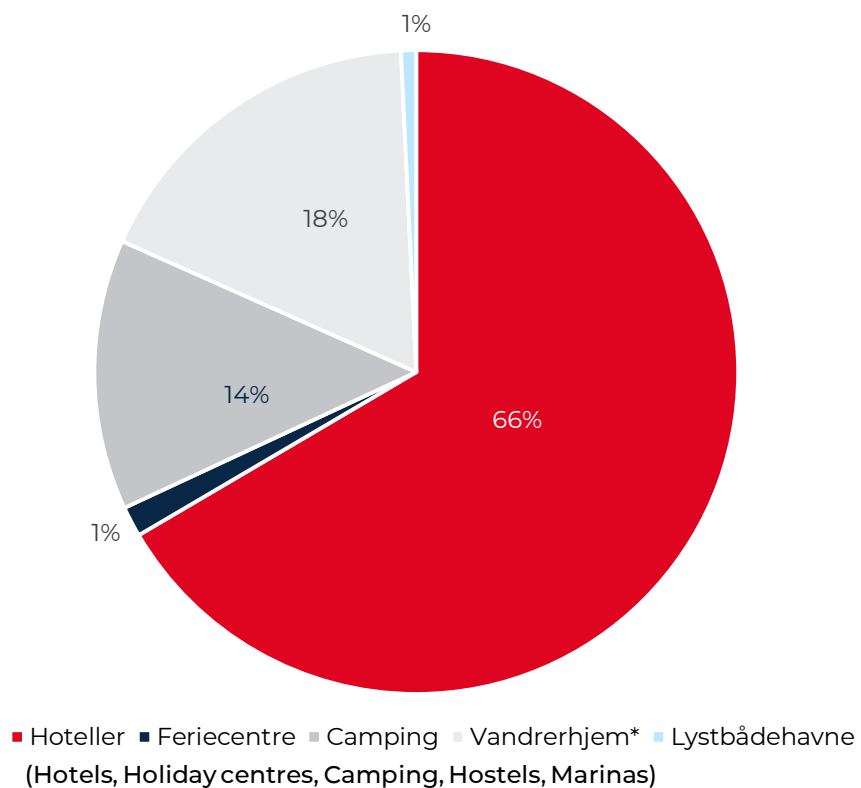
Compared to 2017, the number of French overnight stays increased by 16.1 pct. in 2018.

French overnight stays in Denmark Numbers and growth compared to the year before

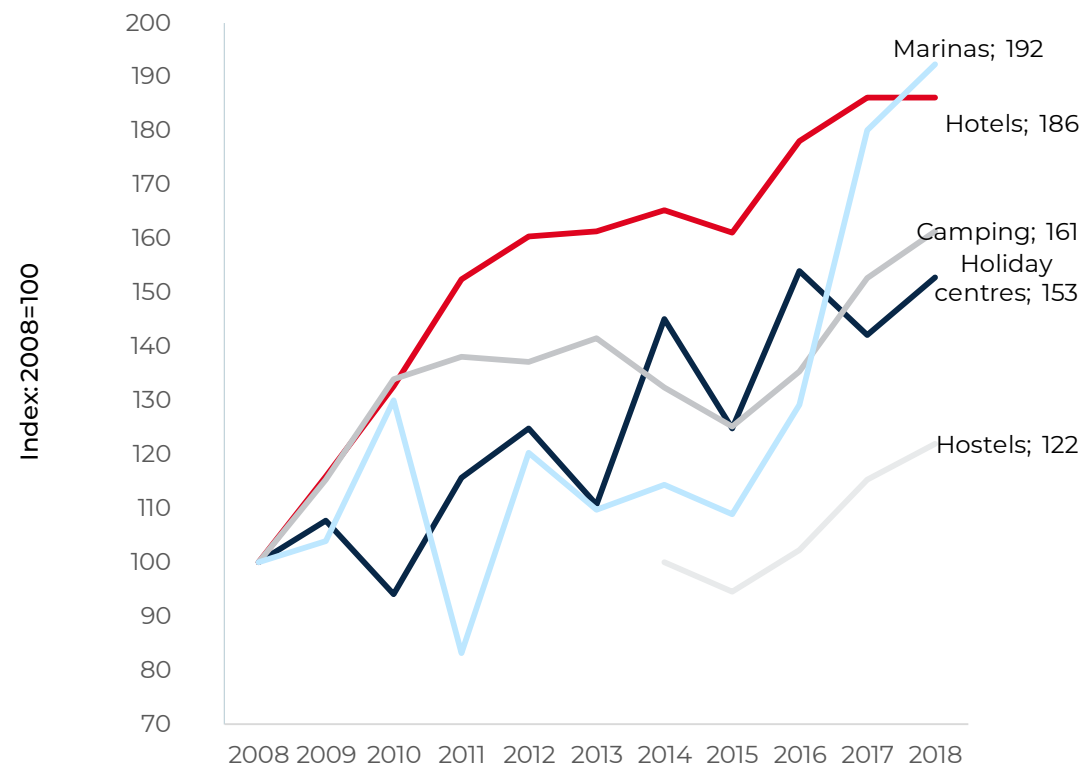


French Overnight Stays by Accommodation Type

French Overnight Stays in Denmark, 2018



Growth in French Overnight Stays in Denmark



French Overnight Stays Throughout the Year

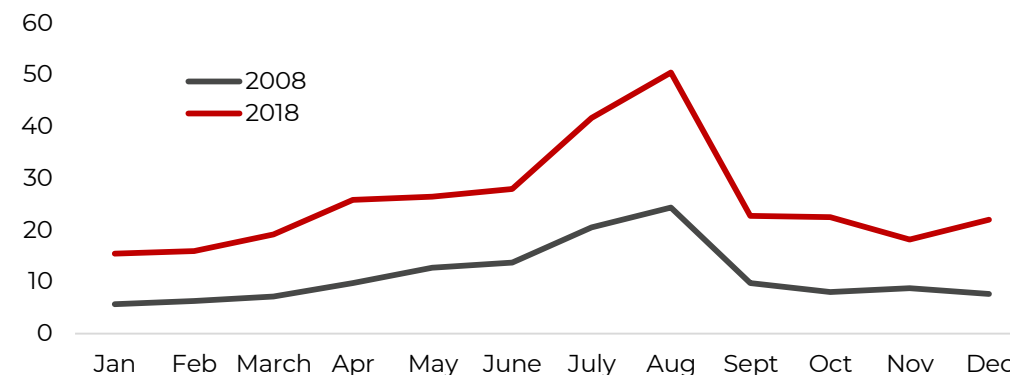
More French overnight stays in-season as well as off-season

From 2008 to 2018, the number of French overnight stays in Denmark has increased by 129 pct. The increase is to be found all year round, during the high season, the shoulder season and the winter season.

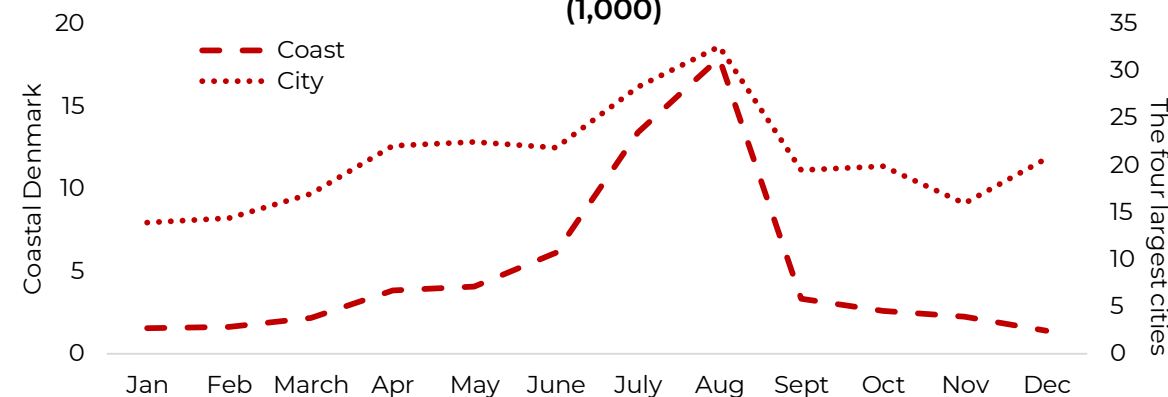
	2008	2018	2008	2018
	Number (1,000)		Index (2008=100)	
High	45	92	100	205
Shoulder	61	145	100	237
Winter	28	72	100	252
Total	134	308	100	229

The pattern in overnight stays among the French 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.

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



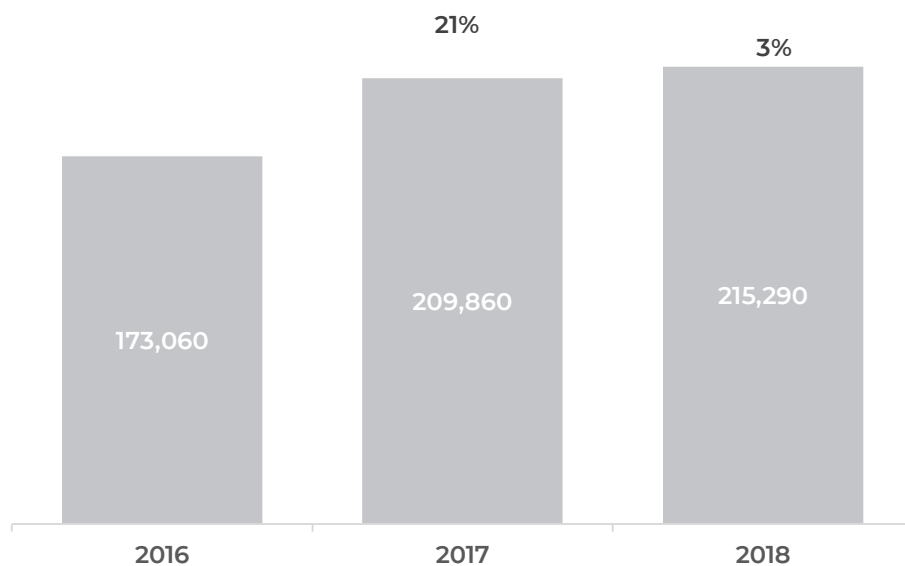
2018: French coastal and city overnight stays (1,000)



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

French Overnight Stays on Sharing Economy Platforms

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



More than 200,000 French overnight stays via Airbnb

The number of French Airbnb overnight stays has increased from approximately 173,000 in 2016 to approximately 215,000 in 2018, an increase of 24 pct.

If you look closer at the distribution of the number of overnight stays between city and coast, two thirds of the French overnight stays take place in one of the four largest cities in Denmark.

French Airbnb overnights stays in 2018 distributed between coast and city as well as overnight stays distributed among the four largest Danish cities

	Coast	City	Copenhagen	Aarhus	Aalborg	Odense
2018	53,603	16,687	149,493	7,531	2,050	2,613
Pct.	25 pct.	75 pct.	92 pct.	5 pct.	1 pct.	2 pct.

Accommodation at Home and Abroad

	French Overnight stays 2018 (1,000)	Percentage of European overnight stays	Growth from 2017 to 2018
France	307,489		4%
Europe	97,756		2%
The rest of the world	142,060		14%
Total	547,305		6%
Spain	26,507	28%	5%
UK	18,368	19%	-12%
Italy	14,819	15%	9%
Ireland	5,298	6%	5%
Greece	5,171	5%	3%
Portugal	5,158	5%	-2%
Germany	3,666	4%	4%
Belgium	2,787	3%	10%
Croatia	2,074	2%	5%
Østrig	1,797	2%	0%
Holland	1,728	2%	4%
Malta	1,665	2%	19%
Switzerland	1,274	1%	2%
Turkey	941	1%	25%
Czech Republic	697	1%	-3%
Poland	528	1%	0%
Hungary	447	0%	-2%
Bulgaria	444	0%	14%
Norway	422	0%	10%

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	
Germany	15,206	28%
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%
Austria	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	7,29	13%

France	Turnover 2017 (m DKK)	Percentage
Visits with paid accommodation		
Hotel – holiday	341	31%
Hotel – business	215	19%
Holiday centre	6	1%
Camping	74	7%
Hostels	50	5%
Rented holiday home	0	0%
Yacht	2	0%
Sharing Economy platforms	410	28%
Other*	6	1%
Total	1,103	76%
Visits with free accommodation		
Total	354	24%

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

Tourists in Denmark

A photograph of a modern, reflective sculpture in a park. The sculpture is a large, multi-tiered structure made of polished, reflective metal, possibly stainless steel, which reflects the surrounding environment, including the trees and the sky. It is situated on a grassy area with scattered autumn leaves. In the background, there are several tall, thin trees with sparse, yellowing leaves, suggesting an autumn setting. A body of water is visible in the distance under a clear blue sky. The overall scene is a mix of natural and man-made elements.

French Accommodation in the Four Largest Danish Cities

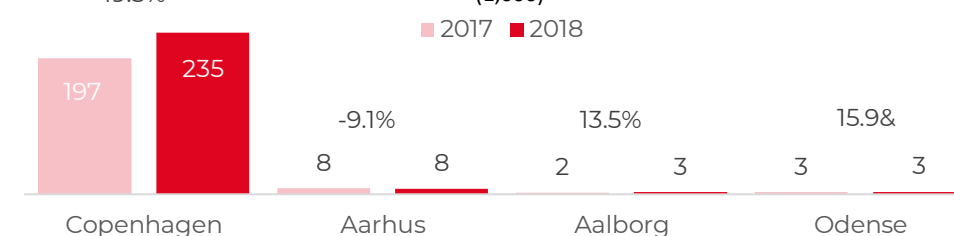
Total number of overnight stays in the four largest cities*

	Overnight stays (1,000)	Percentage of Total	Percentage of foreign overnight stays
Denmark	5,412	43%	
Foreign countries	7,155	57%	
Germany	854	7%	12%
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%
Total	12,564	100%	100%

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
Germany	646	72	124	13
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
Total	9,897	1,170	982	515

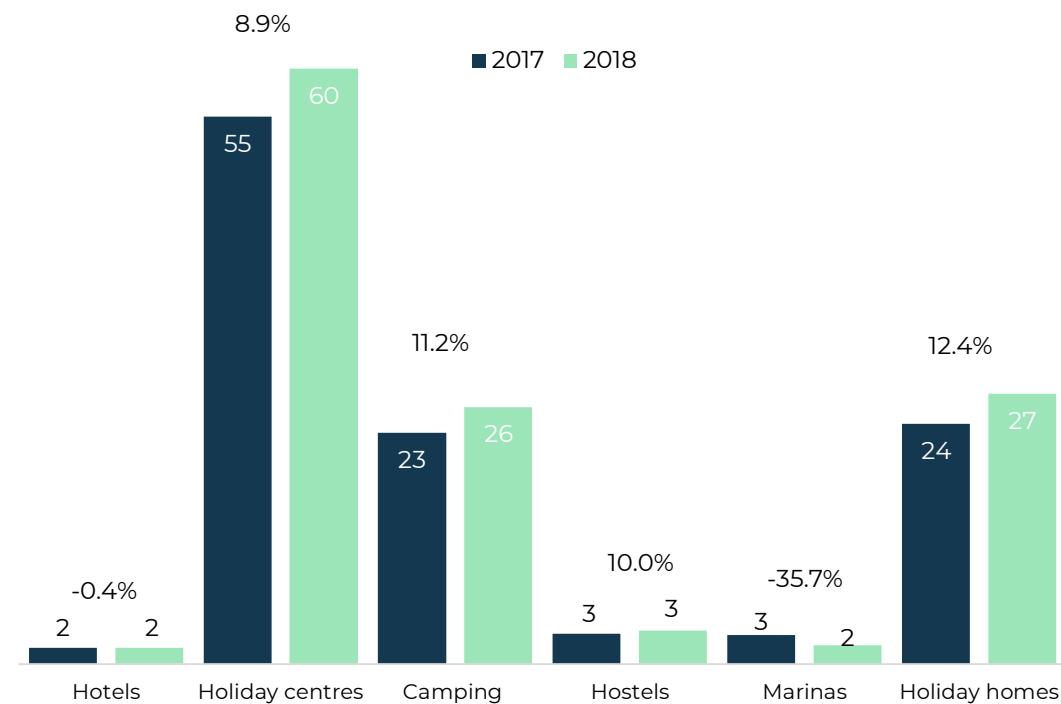
Growth in French overnight stays in cities
(1,000)



French 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/>			
Germany	14,829	36%	73%
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 French overnight stays in Coastal Denmark by accommodation types* (1,000)



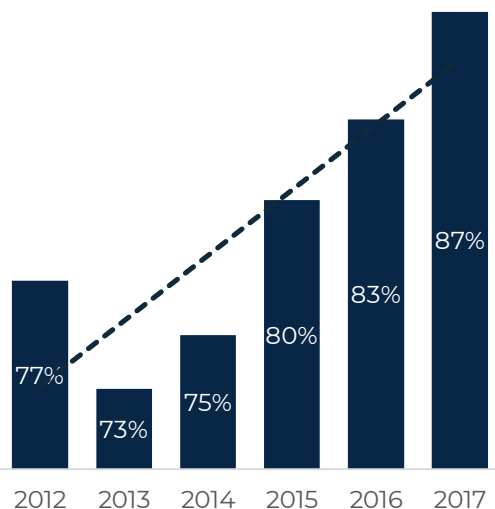
The Digital Tourist



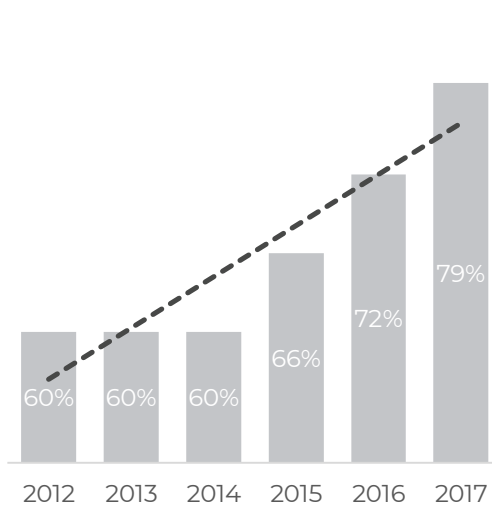
Internet Usage

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

Access to the internet



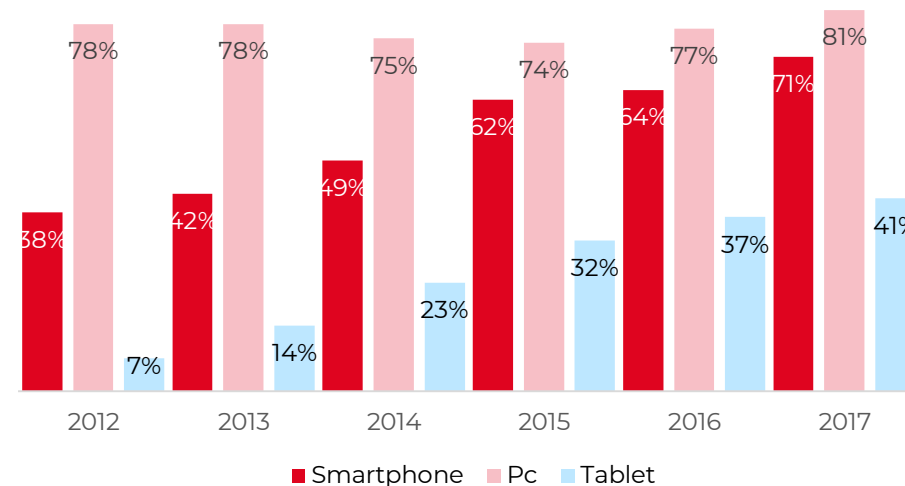
Use the internet on a daily basis



Average number of online devices per person

2012	2013	2014	2015	2016	2017
1.8	2.3	2.2	2.5	2.8	3.0

Internet usage by device



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

2012	2013	2014	2015	2016	2017
19%	27%	37%	47%	50%	61%

Searches for Denmark

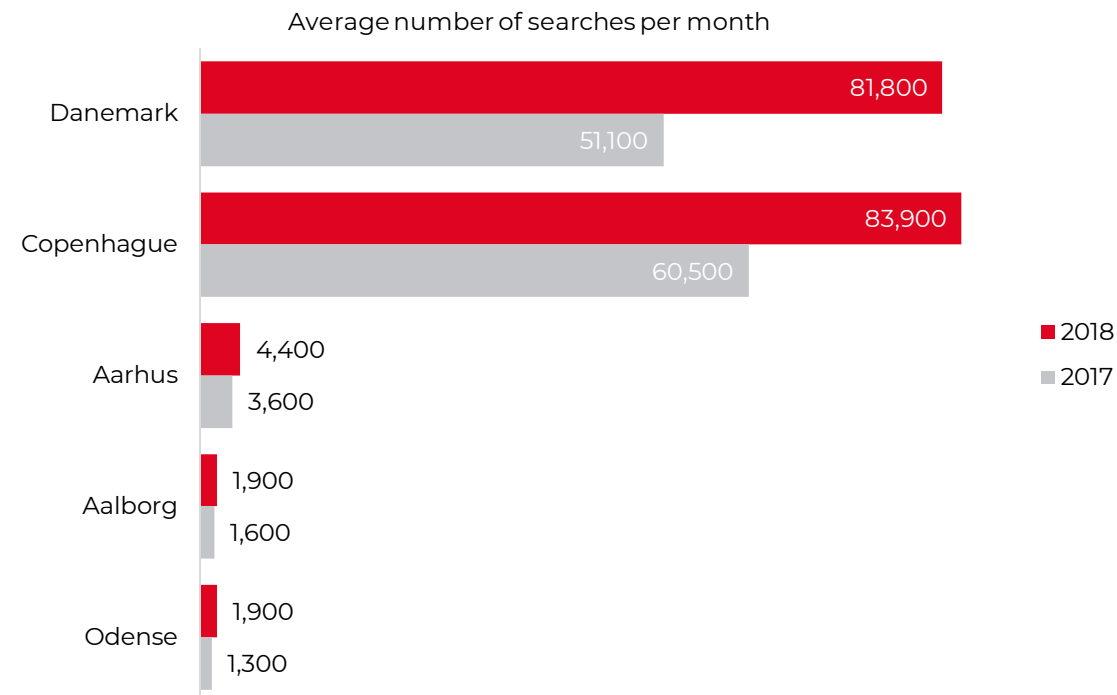
An increase in searches for Denmark and the four largest cities

Overall, in France there are more searches for Copenhagen and Denmark than for Aarhus, Aalborg and Odense.

The terms *Danemark* and *Copenhagen* had significantly more searches in 2018 than in 2017. The terms *Aarhus*, *Aalborg* and *Odense*, also had more searches in 2018 than in 2017.

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

Growth in search volume for Denmark and the four largest cities as search terms



Publicity and Visibility in the Media



Press Releases and Newsletters in the French Media

Trends in the Media Landscape

Anna Orlando, PR & Press Manager

”

The interest in “The Danish Way” is booming in France. Events such as the Tour de France - Le Grand Départ in Denmark - in 2021, their Royal Highnesses Prince Joachim and Princess Marie’s moving to Paris, Danish art in French museums, architect Bjarke Ingel’s projects in France, and the fact that Denmark brought home the gold medal at the Bocuse d’Or 2019, contribute substantially to putting Denmark on the map.

The French media landscape is incredibly diversified and rich in titles and specialised media. The traditional media are regarded as being more credible, especially radio followed by newspapers, TV and magazines.

Denmark is given more and more space in traditional as well as social media.

The French use on average 4 hours and 38 minutes every day online. The number of internet users was still increasing in 2018 and now totals 89% of the French population.

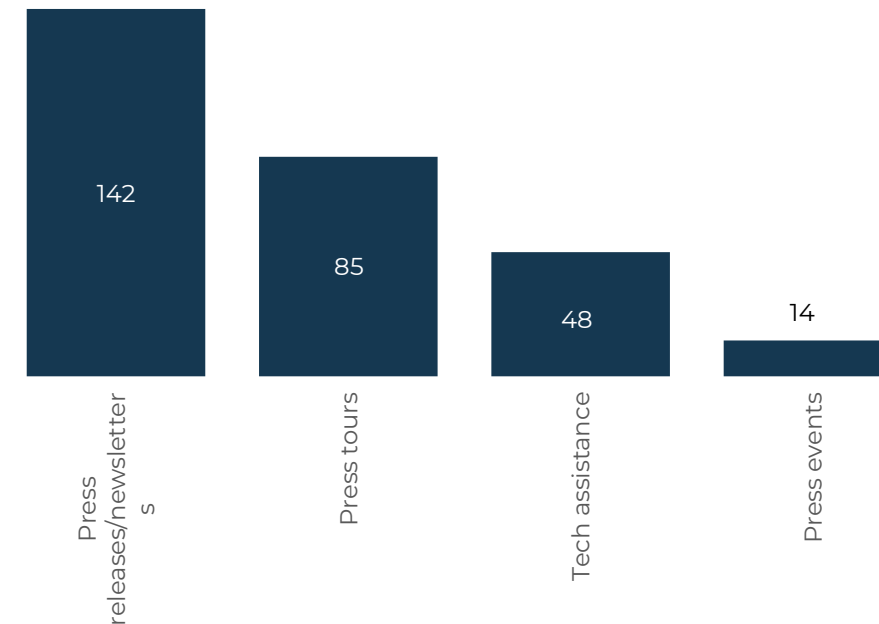
58% use social media, which is lower than the EU level. The most widely used social media are YouTube (45.1 million monthly UVs), Facebook (44.9 million monthly UVs) and Instagram (25 million monthly UVs)

”

142 Press Releases and Newsletters in France in 2018

In 2018, VisitDenmark’s press activities generated 54 posts/tweets on social media and obtained 100,156 comments, shares and likes.

Number of articles by press activities, 2018



Publicity in the Media Landscape

VisitDenmark generates publicity in the Media Landscape

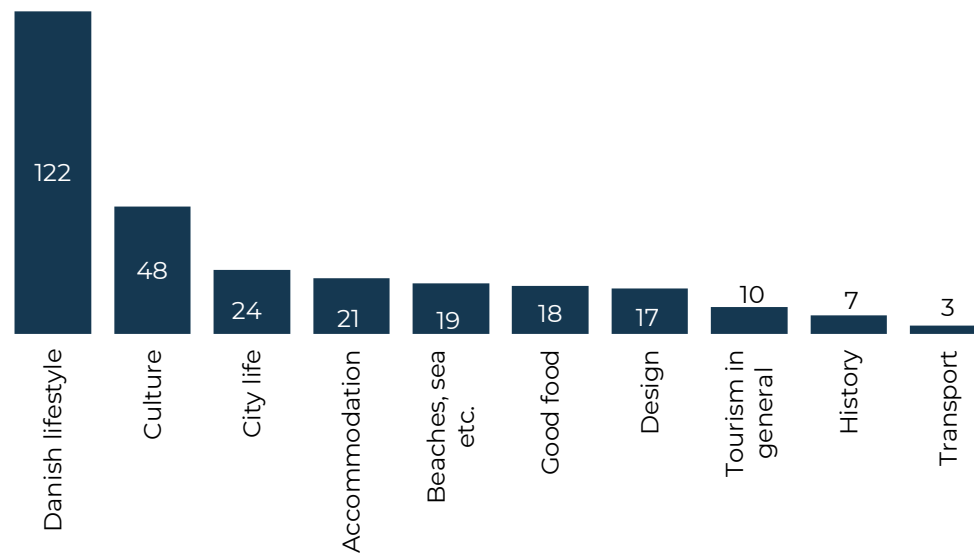
In 2018, VisitDenmark generated publicity in 289 articles in France and reached about 142 m readers.

Instagram generated the highest number of posts on social media.

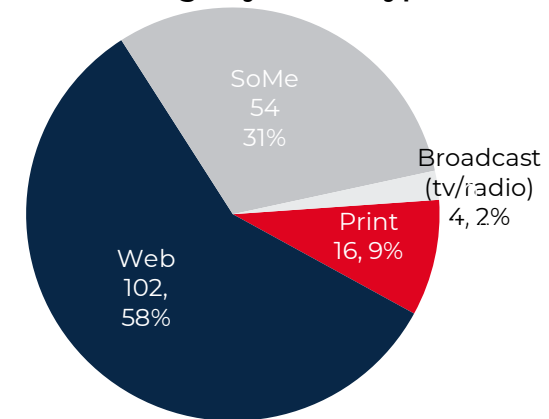
What are the French media writing about Denmark?



Number of articles by topic, 2018



Coverage by media type

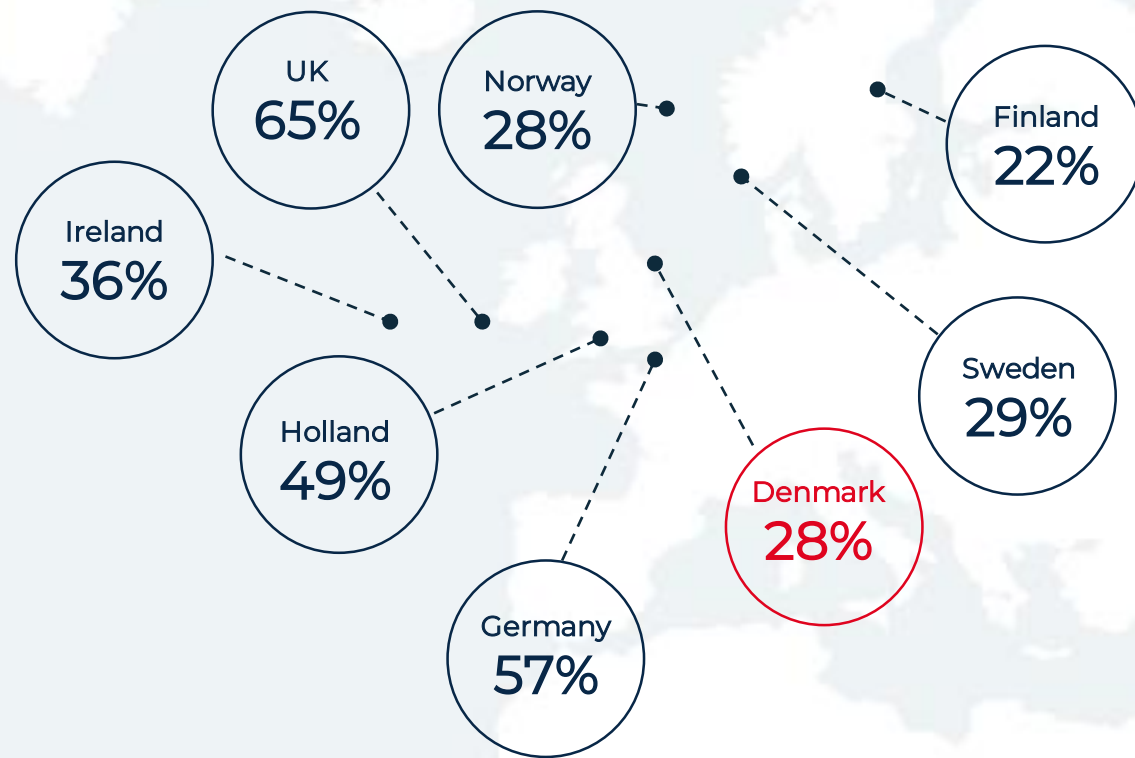




Knowledge, Inspiration and Booking Behaviour

Knowledge of Holiday Destinations

Percentage of the French who know 'some' or 'a lot' about the these respective countries as holiday destinations



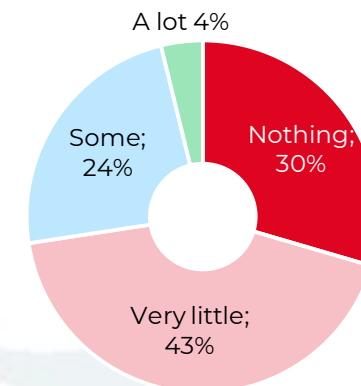
Three out of 10 French people in Paris know some or a lot about Denmark as a holiday destination

A total of 28 pct. say they know some or a lot about Denmark.

Denmark is at the level of Norway and more known than Finland.

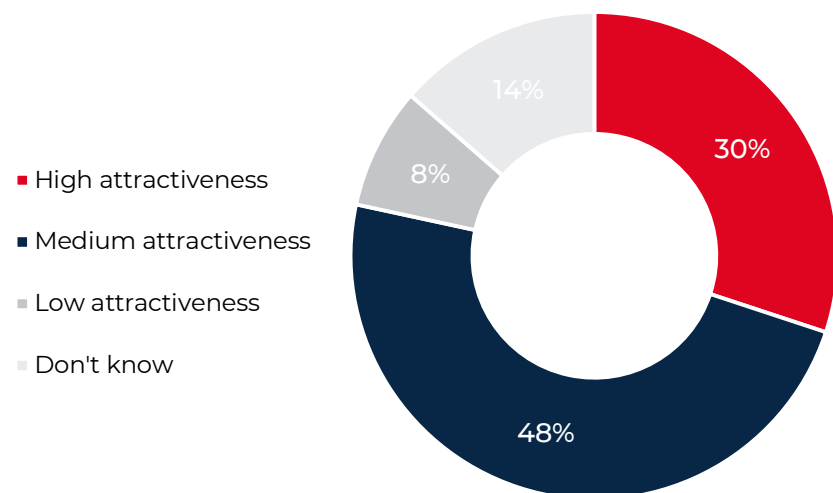
Germany, Holland and the UK are significantly more famous than Denmark, as holiday destinations go.

Knowledge of Denmark among the French in Paris



Denmark as an Attractive Holiday Destination

How would you judge Denmark as a holiday destination?



The French have a good impression of Denmark

Three out of 10 French people view Denmark as an attractive holiday destination. Accordingly, 30% of the French 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.

Numbers from VisitDenmark's Tourist Survey 2017 show that the majority of French tourists who visited Denmark in 2017 are happy, and that 51 pct. would actively recommend Denmark at their return.

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

What do the French associate with Denmark?

The French associate Denmark with nature, beautiful landscapes, cold temperatures and Copenhagen.

To the French, Denmark is associated with nature, beautiful landscapes, beaches and peace and quiet.

Among the associations which Denmark typically generates in the French, we also have Copenhagen, quality, ecology, bicycles and vikings.

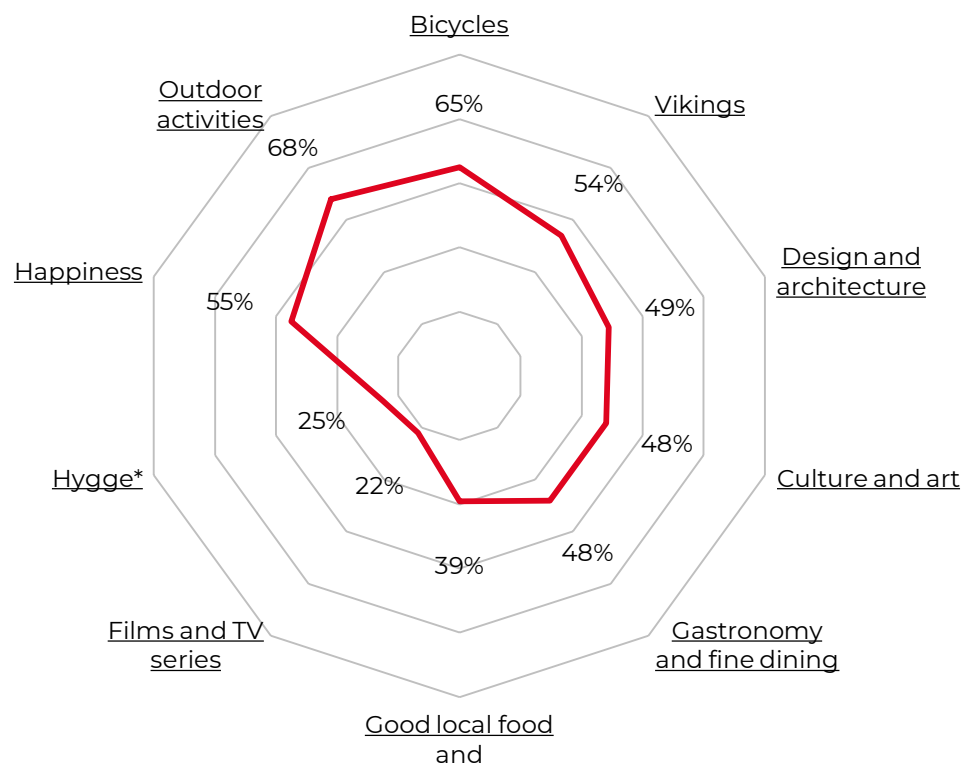
On the top of the list of words which the French mostly associate with Denmark, we have "cold".



The French 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'



When asked, Parisians especially associate Denmark with outdoor activities and bicycles

68 pct. and 65 pct. associate Denmark respectively to a high degree or to a very high degree with the parameters 'bicycles' and 'nature': The perfect combination for outdoor-activities (such as cycling, hiking or sports).

Over half (55 pct.) associate Denmark with happiness and every fourth person associates Denmark with the Danish word 'hygge'.

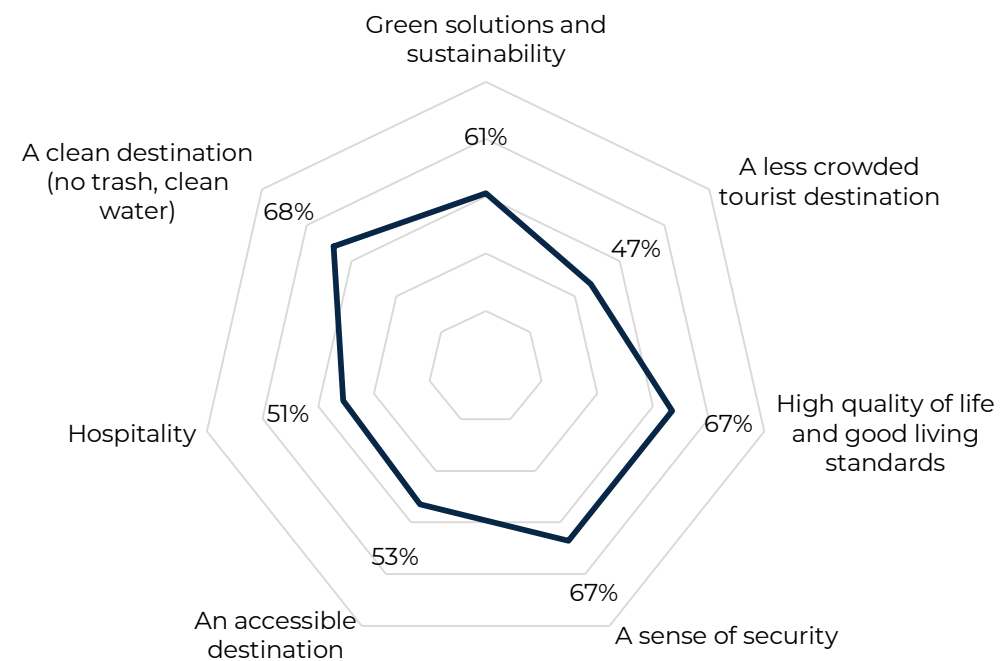
* The Danish word 'hygge' has been mentioned in questions

The French View on Denmark related to selected Parameters of Sustainability

Denmark is mainly associated with the parameters 'clean destination' and 'a sense of security'.

The French associate Denmark with the parameters 'a clean destination (no trash, clean water)' and 'a sense of security'. Both parameters are associated to a high degree or to a very high degree with Denmark among almost seven out of 10 French people in Paris.

To what degree do you associate Denmark with the following?
The percentages include 'to a high degree' and 'to a very high degree'



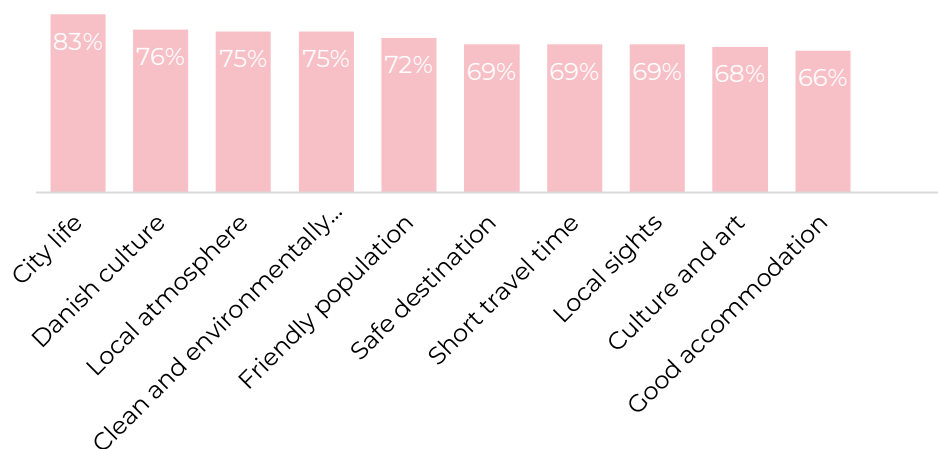
City Breaks: Sources of Inspiration and Travel Motivations

City life is crucial

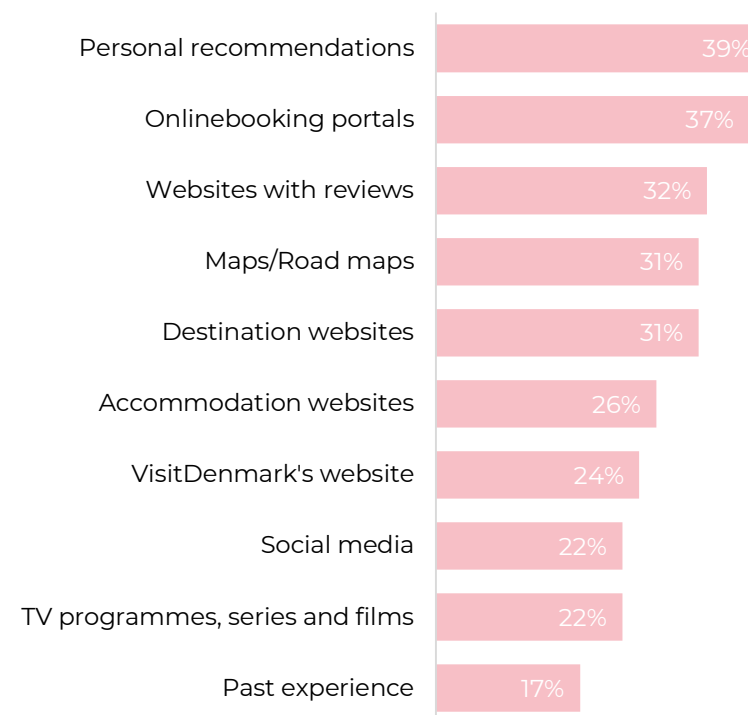
City life is what is most important to the French when they choose to travel to Denmark. Danish culture, local atmosphere and cleanliness and sustainability also play a large part.

The French are mainly inspired to go to Denmark on holiday through personal recommendations and online booking portals.

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

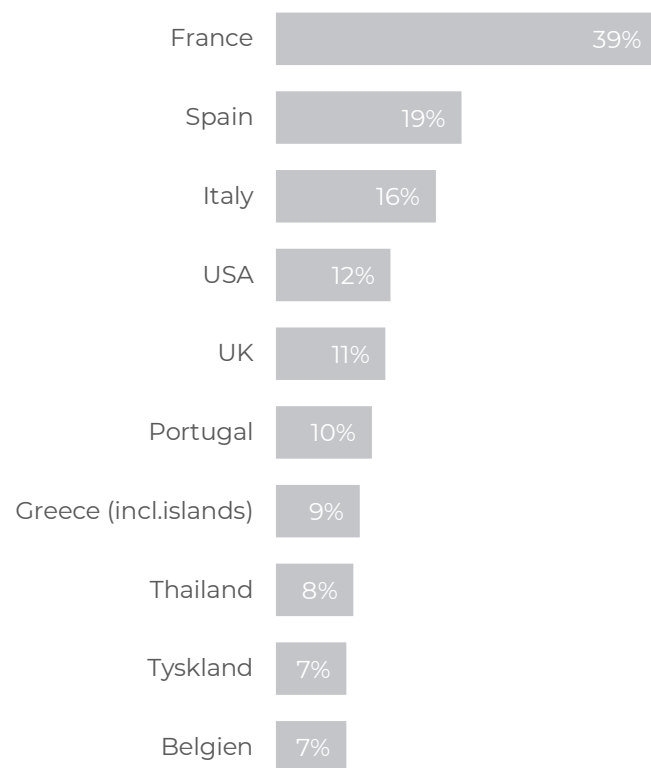


Market Expectations



Expected Destinations of the French in 2019

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



Up to 360,000 more French people in 2019

4 pct. of the French expect to visit Denmark on holiday within the next 12 months. That's approximately 360,000 tourists.

Denmark competes against southern European destinations, such as Spain and Italy, but also against the US and the UK.

Denmark's Potential in terms of Business



43%

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

Percentage:

5%

Denmark

46%

France



36%

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

Percentage:

4%

Denmark

52%

France



40%

of the French population would like a city break

Percentage:

9%

Copenhagen

3%

Aarhus



Knowledge Centre on Tourism in Denmark

www.visitdenmark.dk/corporate/videncenter

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