

Market Profile 2019

Italy

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 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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Key Data and Target Groups



Key Data: Accommodation, Expenses and Turnover

376,000
overnight stays in 2018

32,300
additional overnight stays compared to 2017

9.4 pct.
increase in overnight stays compared to 2017

1.2 m DKK
in Tourism Turnover in 2017

3%
of Italians living in Milan and 3 pct. of those living in Rome are well acquainted with Denmark as a holiday destination

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



Coastal and Nature Tourism

52,000
overnight stays*

2.5%
growth compared to 2017



City Tourism

324,000
overnight stays*

10.6%
growth compared to 2017

3.8 people
tour group

3.2 nights
length of stay



1,700 DKK
daily expenses

The Italian Target Groups

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



Young people: 25-35 year-olds



-  City break
-  Friends
- Couples
- Couple friends



Couples: 35-55 year-olds



-  City break
-  Friends
- Couples
- Couple friends

Couples: 30-45 year-olds w. kids (0-12)

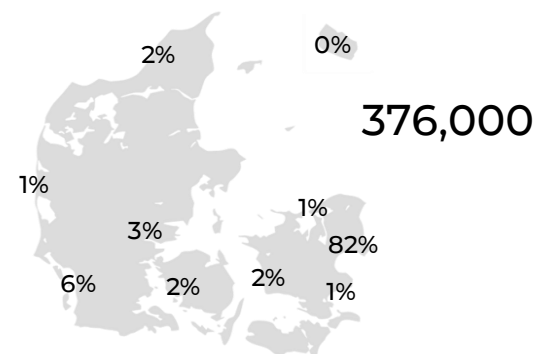


-  City break
-  Family

Residence



Italian overnight stays by regions*



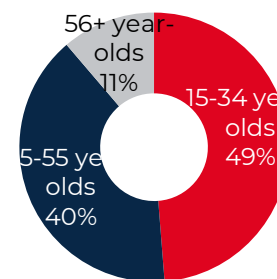
Household income



Education



Italian city tourists in Denmark



Functional necessities



- Weekend getaway or 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 recommendations

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



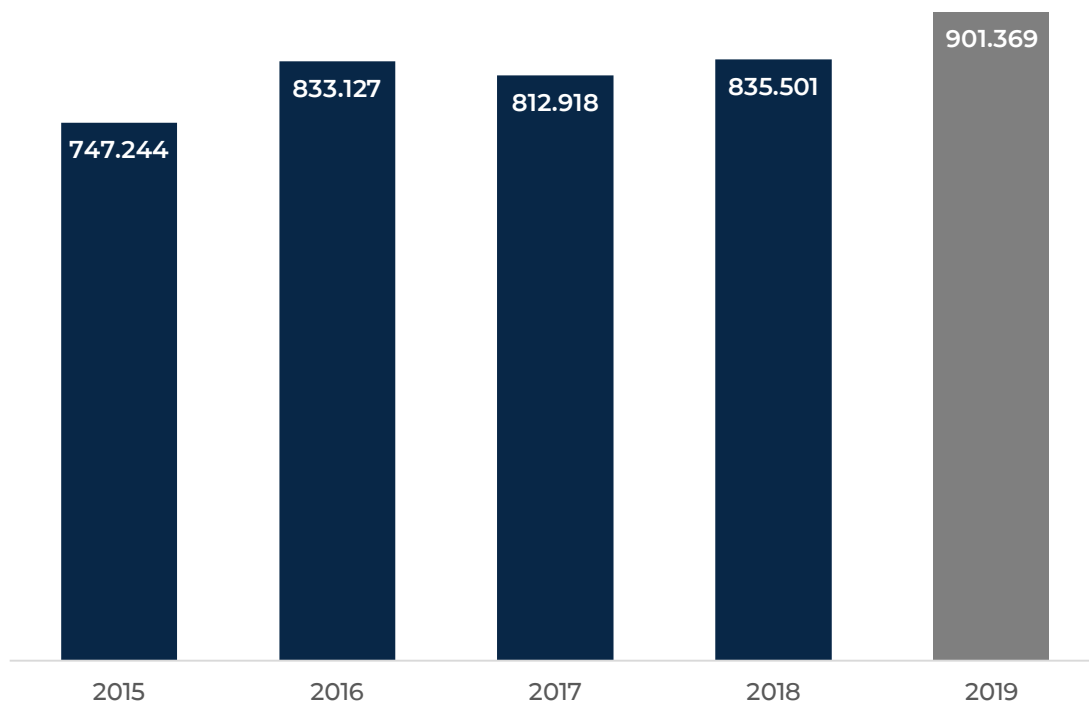
- Dreaming: 4/5 are influenced by the internet
- Inspiration: 4/10 use visitdenmark.it
- Planning: 1/2 use websites from the respective destinations
- Booking: 1/2 book 1 month ahead of departure
- On-site planning: 1/2 use the internet
- Loyalty: 1/10 will return



Passengers and Flight Traffic from Italy to Copenhagen Airport

Seating Capacity from the Italian Airports

Growth in seating capacity
Number of seats



Seating capacity rises 8 pct.

Historically, the implemented seating capacity has been somewhat volatile. From 2015 to 2018, there was an average of approximately 807,000 seats on the routes from the Italian airports to Copenhagen Airport.

In 2019, the number of seats is set to increase with 8 pct. compared to the number of implemented seats from 2018. The seating capacity will hereby surpass the highest level of 2016.

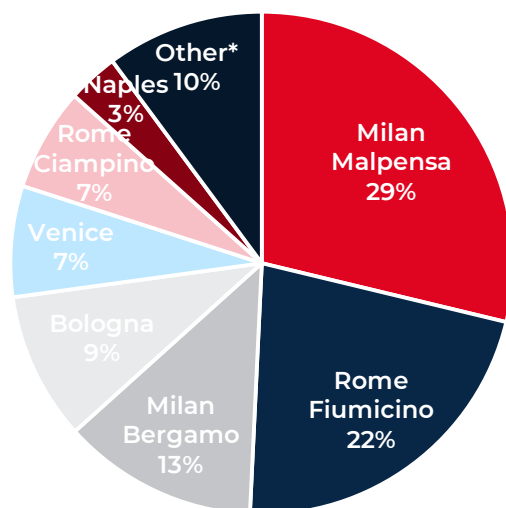
Seating Capacity in 2019 by Airports and Airlines

SAS provides 41 pct. of the seating capacity

The seats on the routes between Milan's three airports (Malpensa, Bergamo and Linate) make up 41 pct. of all seats between Italy and CPH. The seating capacity from Rome's two airports (Fiumicino and Ciampino) make up 29 pct. of all seats between Italy and CPH

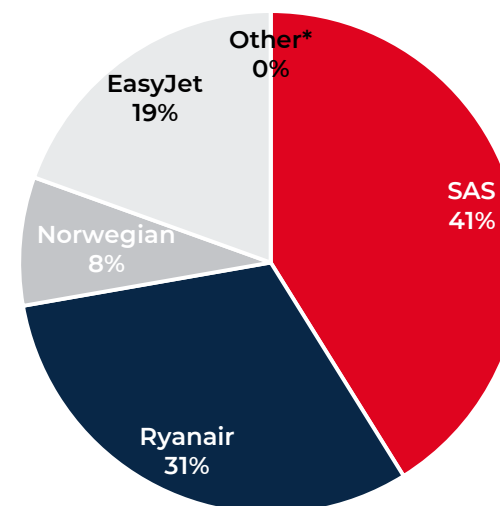
SAS provides the most seats (41 pct.). Low cost airlines such as Ryanair, Norwegian, EasyJet and Vueling provide the remaining seating capacity and hence the majority of the capacity between the Italian airports and CPH.

Seating Capacity by Airport



Other airports: Florence Peretola, Pisa, Olbia Costa Smeralda, Catania Fontanarossa, Palermo, Genova Sestri and Milan Linate.

Seating Capacity by Airline



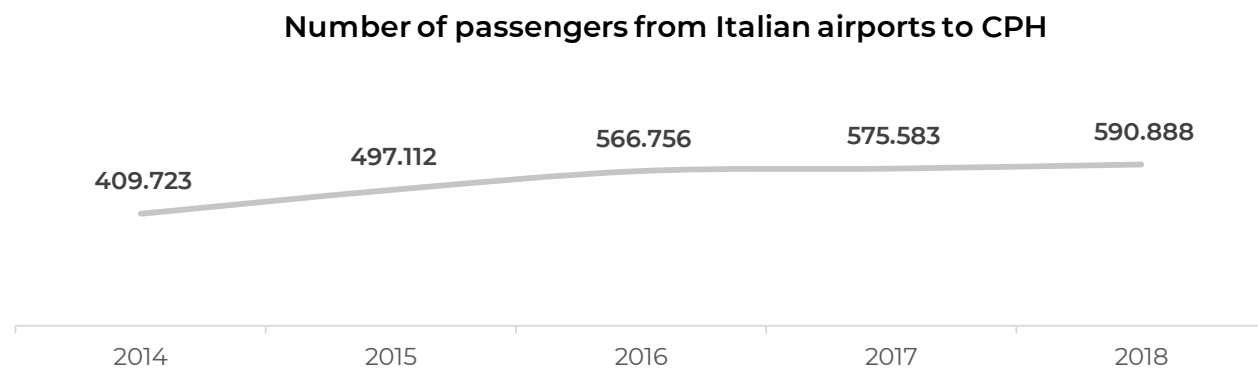
** Other airlines: Vueling and Alitalia.

Number of Passengers from Italian Airports to CPH

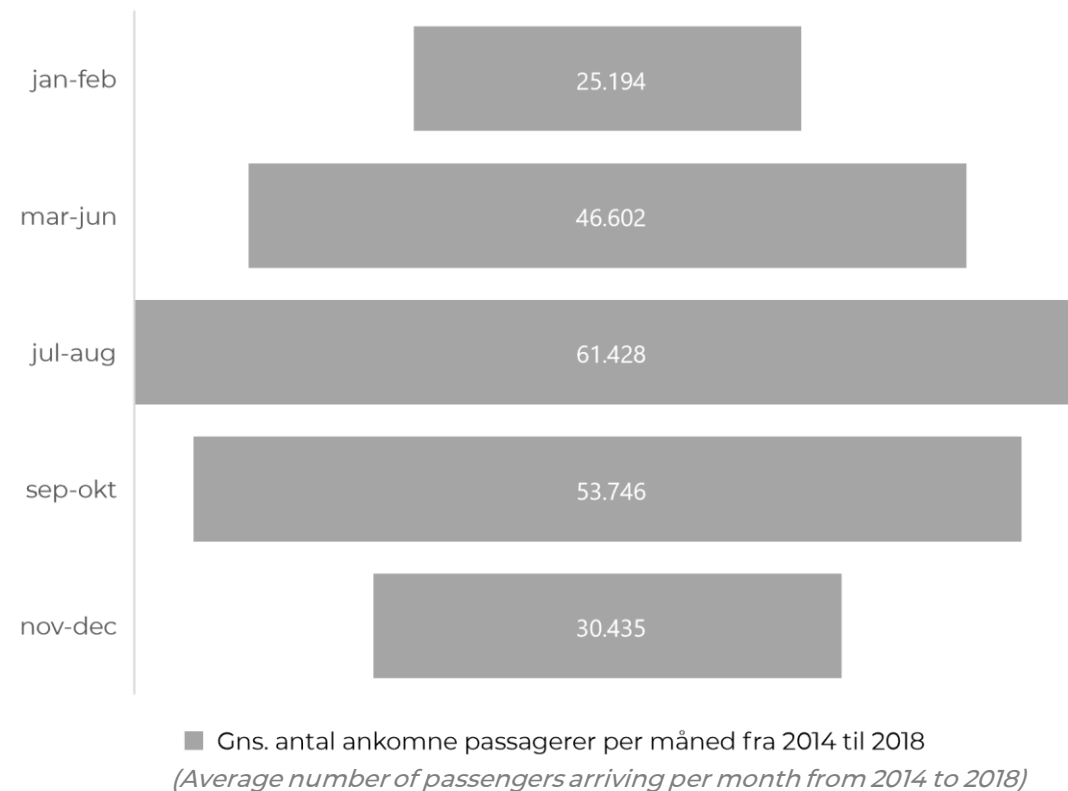
More passengers from Italy

In 2018, more than 590,000 passengers arrived from Italian airports to CPH. That is 2.7 pct. more than in 2017. This makes it the fourth year in a row in which the number of passengers from Italian airports to CPH has increased plus in 2018, it was 44 pct. higher than in 2014.

The average number per month of passengers from Italy to CPH has been highest during the high season.



Number of passengers from Italian airports to CPH

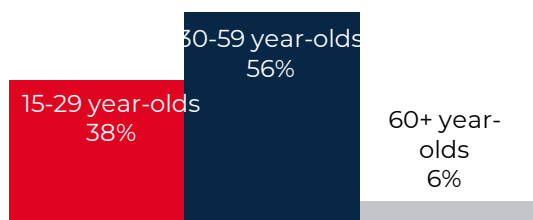


Profile of the Italian Passengers

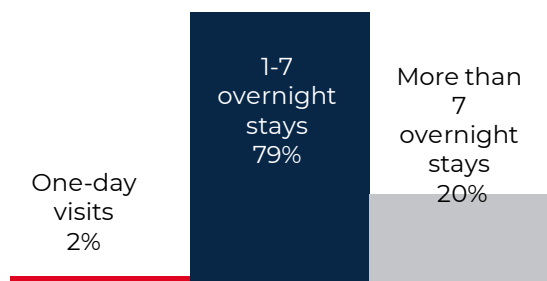
305,000 Italians in CPH in 2018



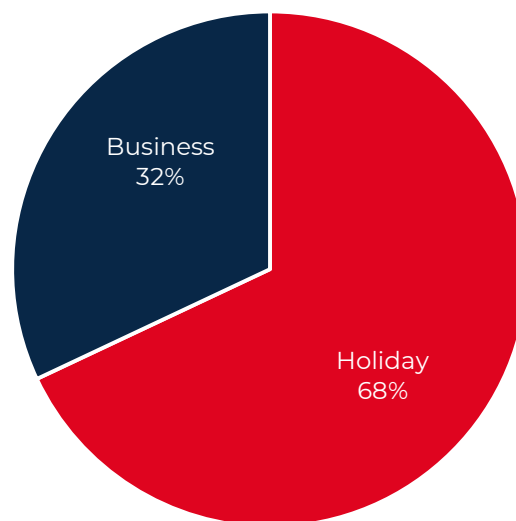
Age



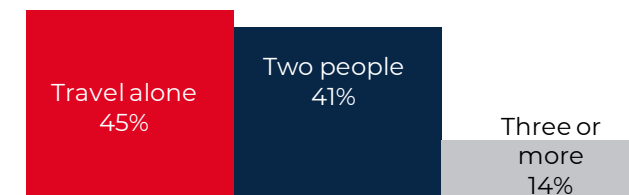
Length of stay



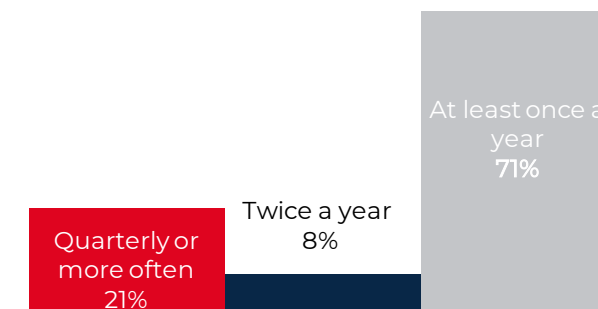
Purpose of journey



Tour group size



Travel frequency to CPH

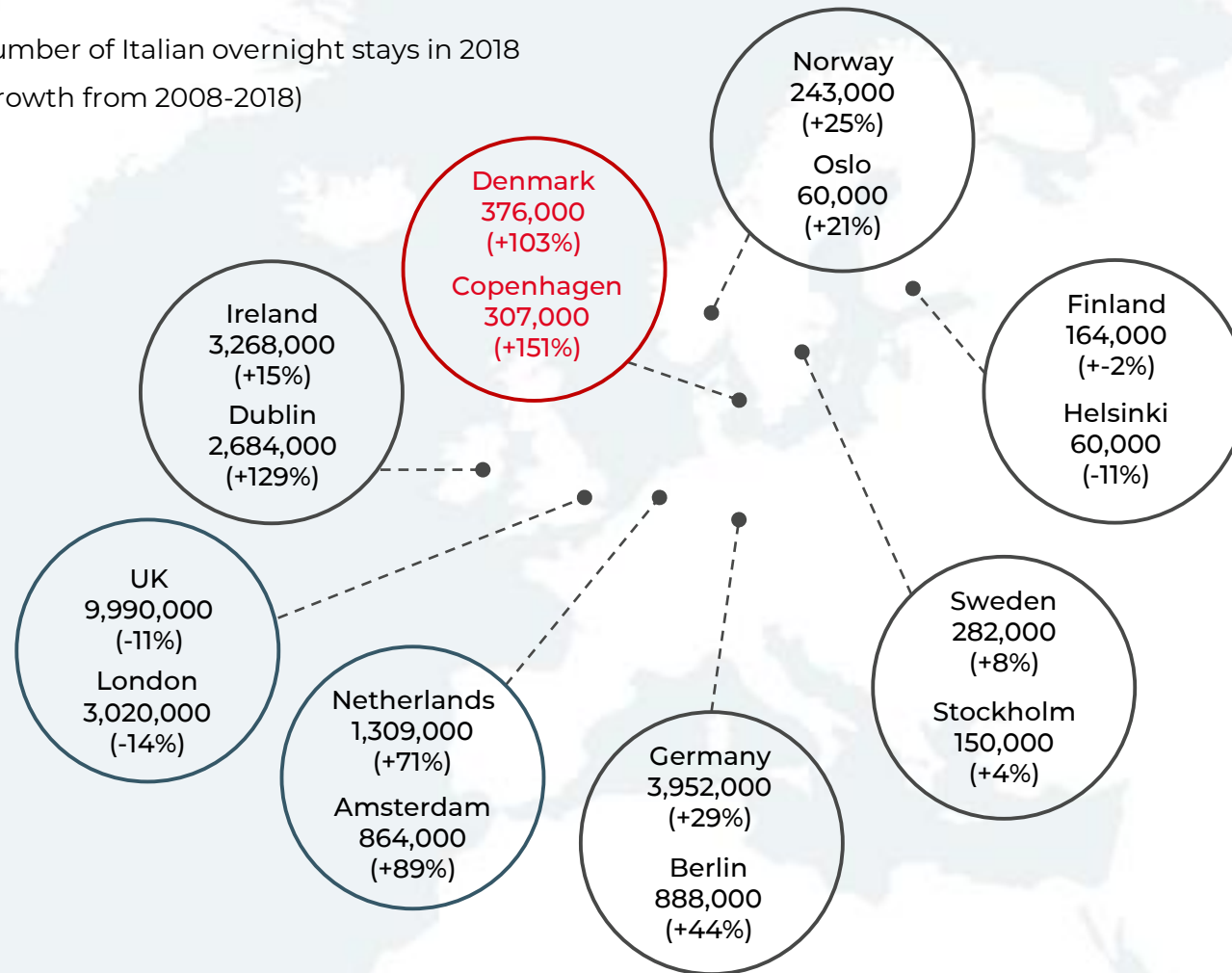


A row of fishing nets is laid out on a wooden frame on a beach. The nets are silhouetted against a vibrant sunset sky with shades of purple, pink, and orange. The ocean is visible in the background under the twilight sky.

Accommodation, Turnover and Seasonality

Italian Overnight Stays in Northern Europe

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



Growth in Italian overnight stays

In 2018, Denmark had the highest number of Italian overnight stays among the Nordic countries. With a growth of 103 pct. in the number of overnights stays from 2008 to 2018, the Danish growth rates are well above the ones of the other Nordic countries.

Copenhagen accounted for 53% of all Italian overnight stays in the Nordic cities, in 2018, with a total of 307,000 overnight stays.

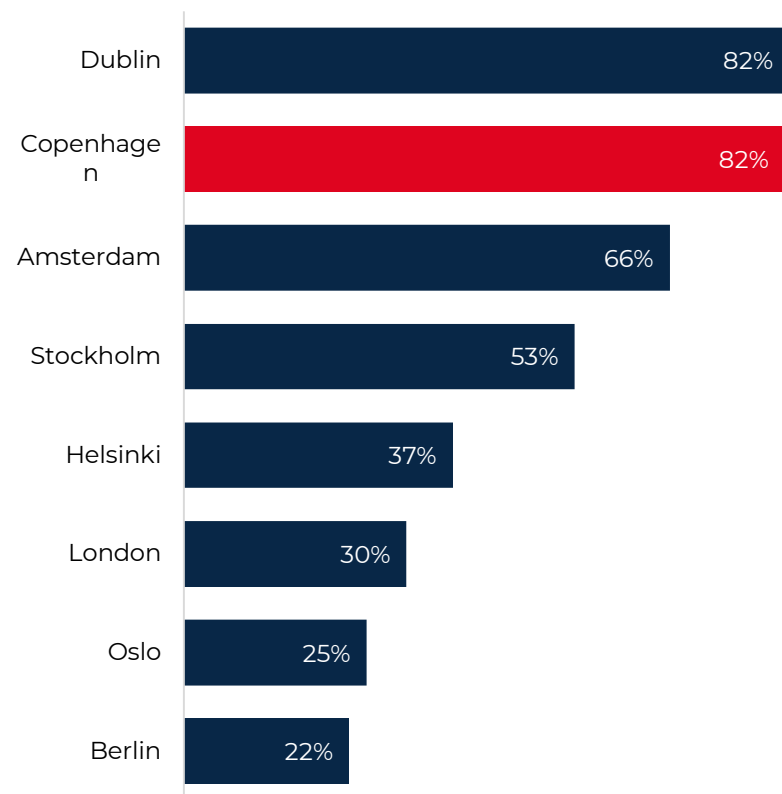
If you look at the entire European competitive field, then Germany, Holland, UK and Ireland have significantly more Italian overnight stays, but none of these countries has seen growth rates quite like the Danish ones

The capitals of the four aforementioned countries attracted a significantly higher number of Italian overnight stays, compared to Copenhagen.

Overnight Stays in the Capitals of Northern Europe

Italian 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 82 pct. of all Italian overnight stays in Denmark

Within the Northern European competitive set, the percentage of Italian overnight stays cities attract varies considerably.

Dublin and Copenhagen lie at the very top, attracting approximately eight out of 10 (82 pct.) of all Italian overnight stays, respectively in Ireland and Denmark.

At the bottom of the list, on the other hand, we find Oslo and Berlin with respectively 25 pct. and 22 pct. of the Italian overnight stays in Norway and Germany.

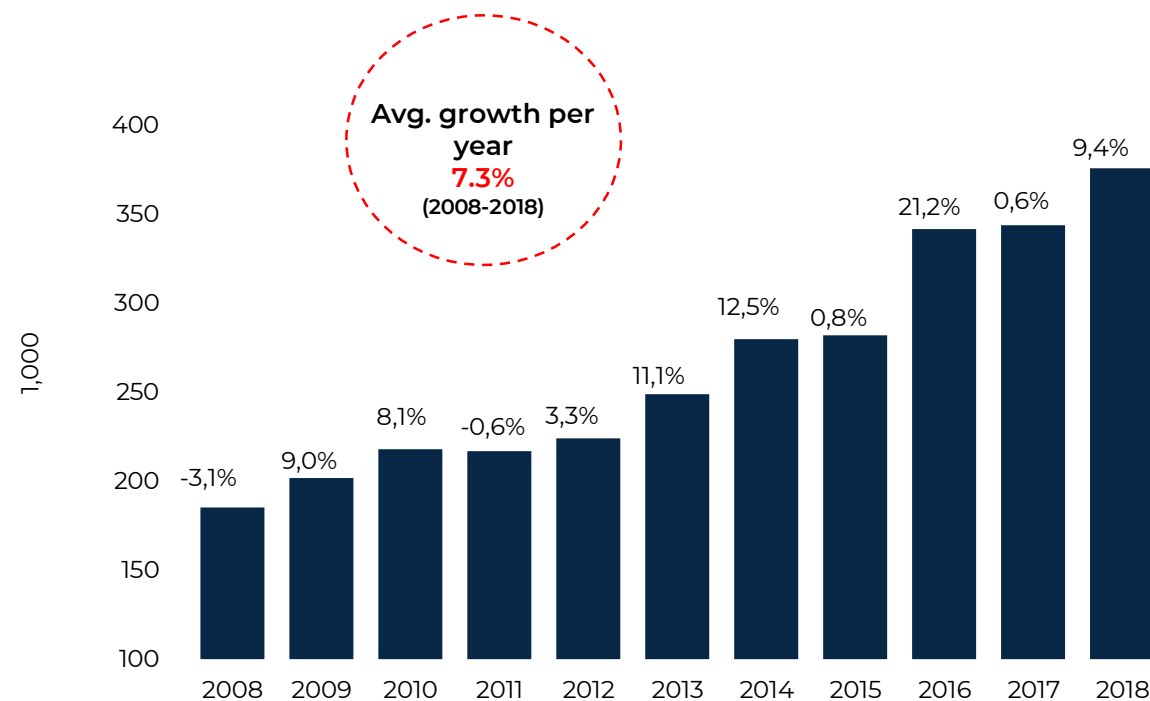
Growth in Italian Overnight Stays

High growth in the number of Italian overnight stays in Denmark

In 2018, the Italian spent 376,000 nights in Denmark.

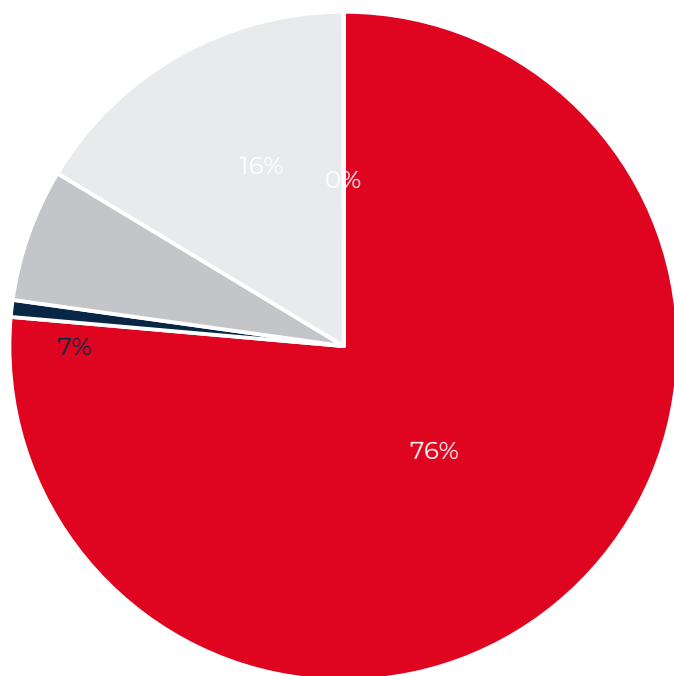
Compared to 2017, the number of Italian overnight stays increased by 9.4 pct. in 2018.

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



Italian Overnight Stays by Accommodation Types

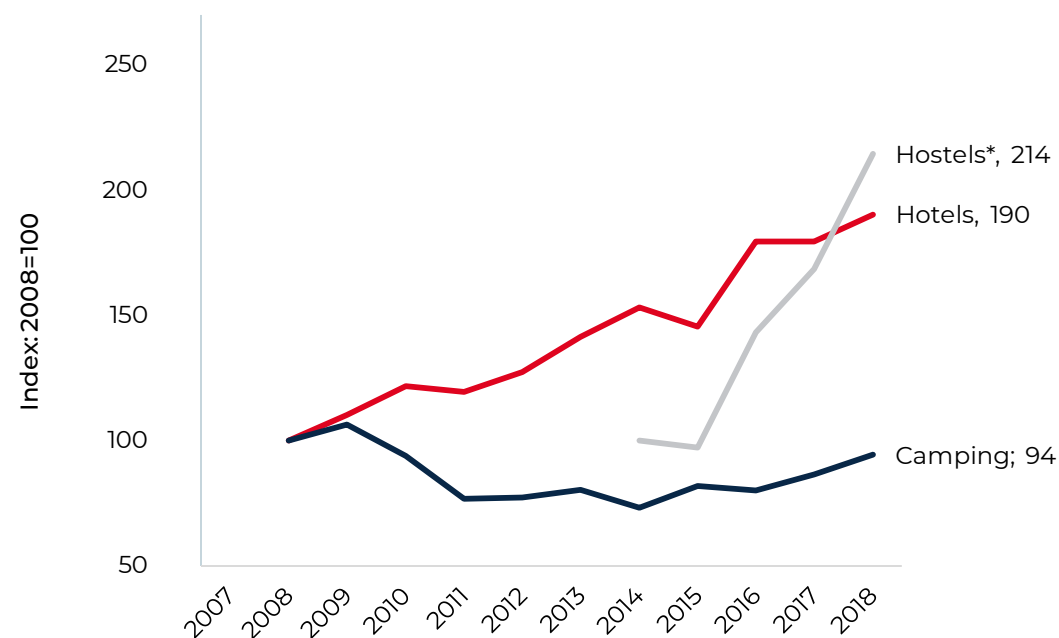
Italian Overnight Stays in Denmark, 2018



■ Hoteller ■ Feriecentre ■ Camping ■ Vandrerhjem* ■ Lystbådehavne

(Hotels, Holiday Centers, Camping, Hostels, Marinas)

Growth in Italian Overnight Stays in Denmark



Italian Overnight Stays Throughout the Year

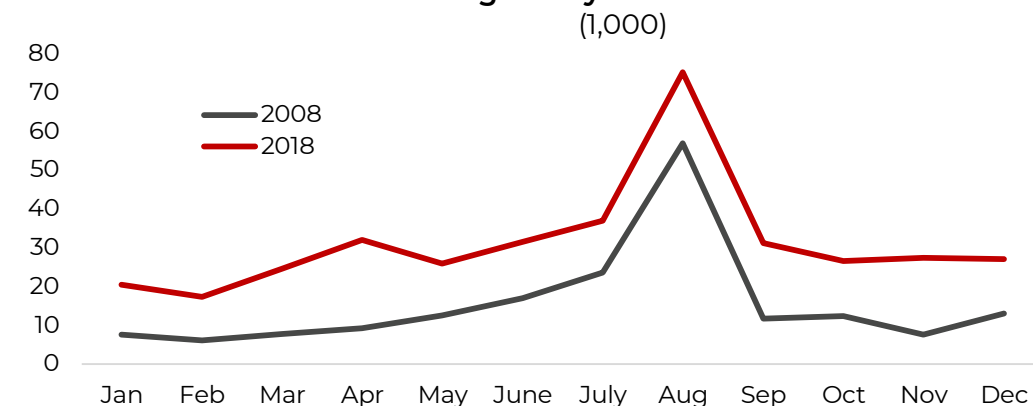
More Italian overnight stays in-season as well as off-season

From 2008 to 2018, the number of Italian overnight stays in Denmark has increased by 103 pct. The increase is found all year round, during the high season, the shoulder season and the winter season.

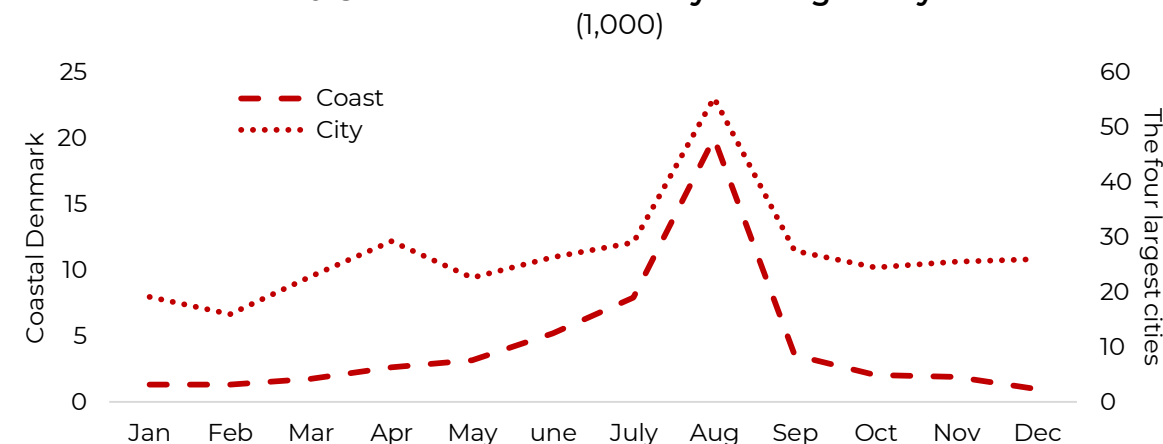
	2008	2018	2008	2018
	Number (1,000)		Index (2008=100)	
High	81	112	100	139
Shoulder	70	172	100	244
Winter	34	92	100	270
Total	185	376	100	203

The pattern in overnight stays among the Italians 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.

Italian overnight stays in Denmark in months



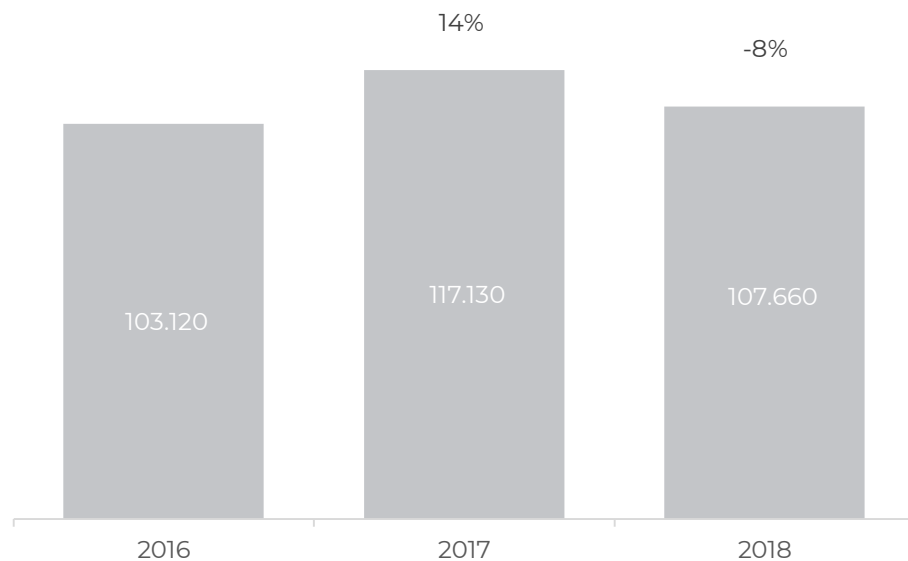
2018: Italian coastal and city overnight stays



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

Italian Overnight Stays on Sharing Economy Platforms

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



More overnight stays in hotels and fewer via Airbnb

In 2018, the number of Italian overnight stays via Airbnb was 8 pct. lower than the level in 2017, but still slightly higher than in 2016.

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

Italian 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	25,328	82,332	74,649	4,524	1,096	2,063
Pct.	24 pct.	66 pct.	91 pct.	5 pct.	1 pct.	3 pct.

Accommodation at Home and Abroad

	Italian Overnight stays 2018 (1,000)	Percentage of European overnight stays	Growth from 2017 to 2018
Italy	217,779		4%
Europe	99,029		4%
The rest of the world	55,721		11%
Total	372,529		5%
France	43,436	44%	11%
Spain	11,642	12%	-20%
UK	9,990	10%	2%
Croatia	4,994	5%	7%
Germany	3,952	4%	7%
Greece	3,286	3%	6%
Ireland	3,269	3%	-1%
Austria	2,863	3%	11%
Malta	2,412	2%	-3%
Portugal	1,572	2%	14%
Slovenia	1,369	1%	3%
Holland	1,309	1%	21%
Albania	1,174	1%	2%
Czech Republic	1,089	1%	-1%
Switzerland	916	1%	-1%
Hungary	700	1%	1%
Poland	692	1%	8%
Belgium	563	1%	0%
Romania	472	0%	36%

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	7,329	13%

Italy	Turnover 2017 (m DKK)	Percentage
Visits with paid accommodation		
Hotel – holiday	328	35%
Hotel – business	317	34%
Holiday centre	3	0%
Camping	70	7%
Hostels	41	4%
Rented holiday home	0	0%
Yacht	0	0%
Sharing Economy platforms	172	15%
Other*	15	1%
Total	946	81%
Visits with free accommodation		
Total	215	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

Tourists in Denmark



Italian Accommodation in the Four Largest Danish Cities

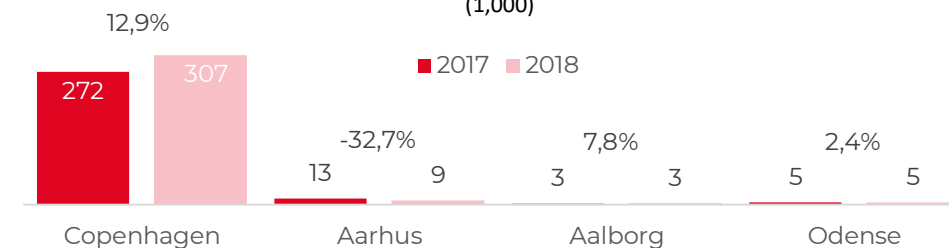
Total number of overnight stays in the four largest cities*

	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)

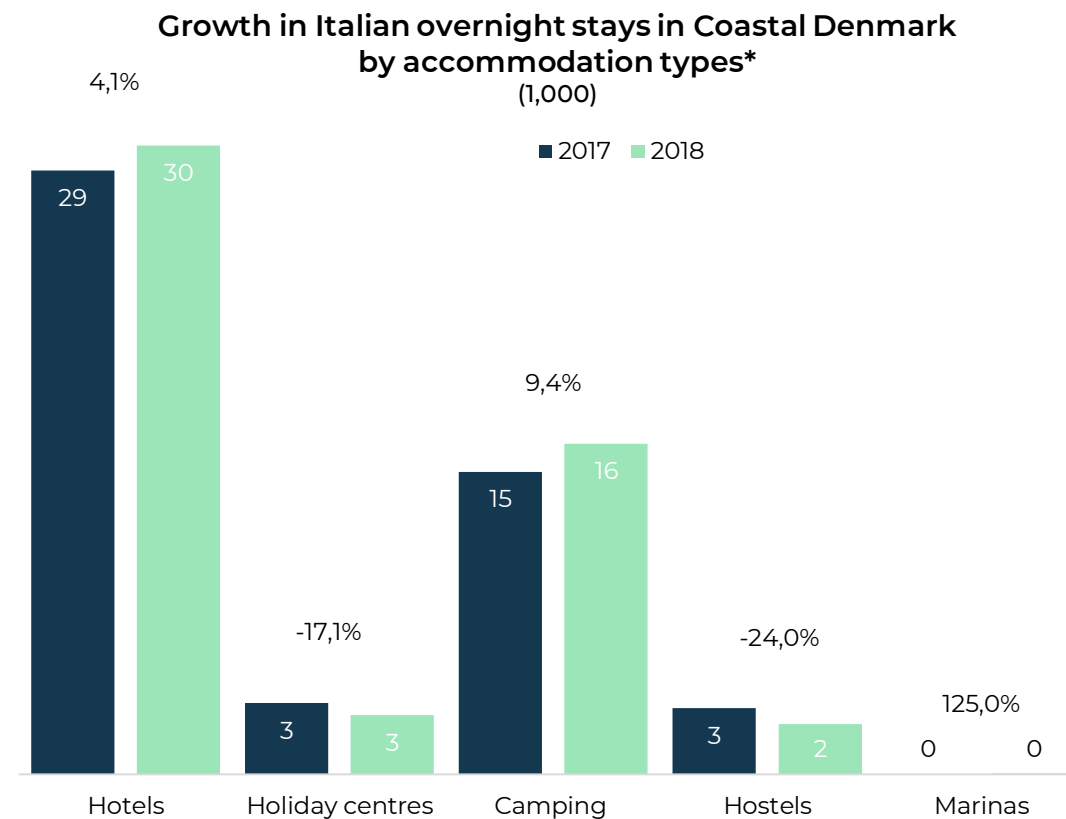
	Copenhagen	Aarhus	Aalborg	Odense
Denmark	3,621	820	594	378
Foreign countries	6,276	350	388	137
USA	686	12	8	6
Sweden	670	33	25	16
UK	667	28	12	12
Germany	646	72	124	13
Norway	485	65	132	10
Italy	307	9	3	5
France	235	8	3	3
Holland	201	25	14	8
China	167	6	2	8
India	85	4	1,2	0,6
Other countries	2,128	88	64	55
Total	9,897	1,170	982	515

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



Italian 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;"/>			
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%



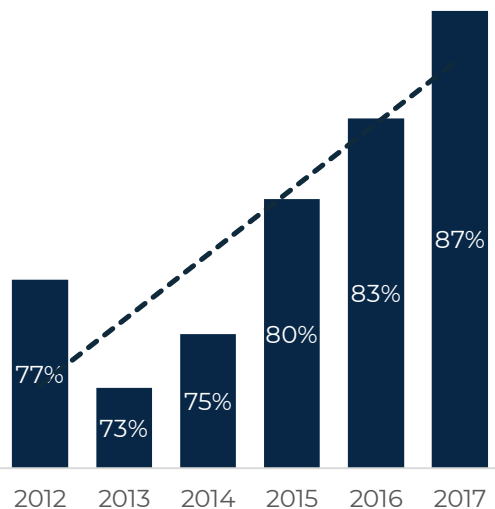
The Digital Tourist



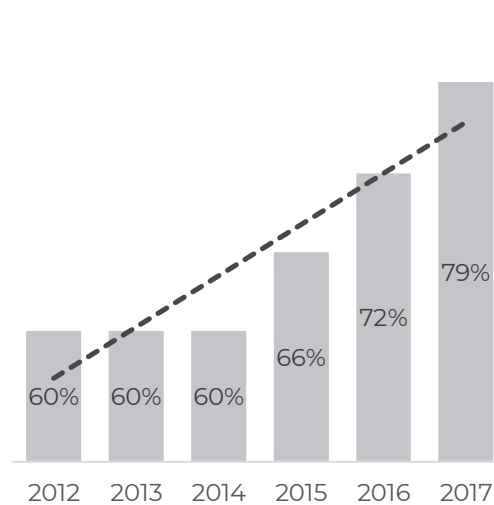
Internet Usage

Smartphones overtake computers for internet use

Access to the internet



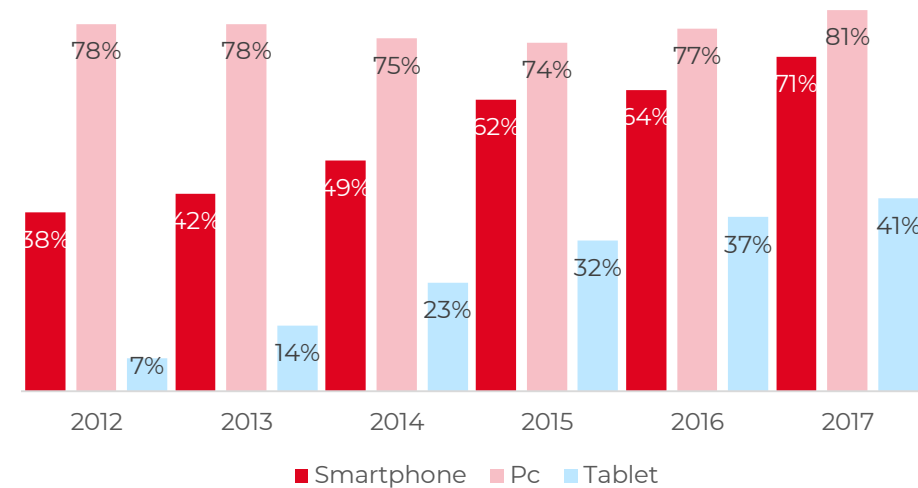
Use the internet on a daily basis



Average number of online devices per person

2012	2013	2014	2015	2016	2017
1.5	2.0	2.0	2.0	2.3	2.6

Internet usage by device



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

2012	2013	2014	2015	2016	2017
13%	29%	46%	63%	68%	81%

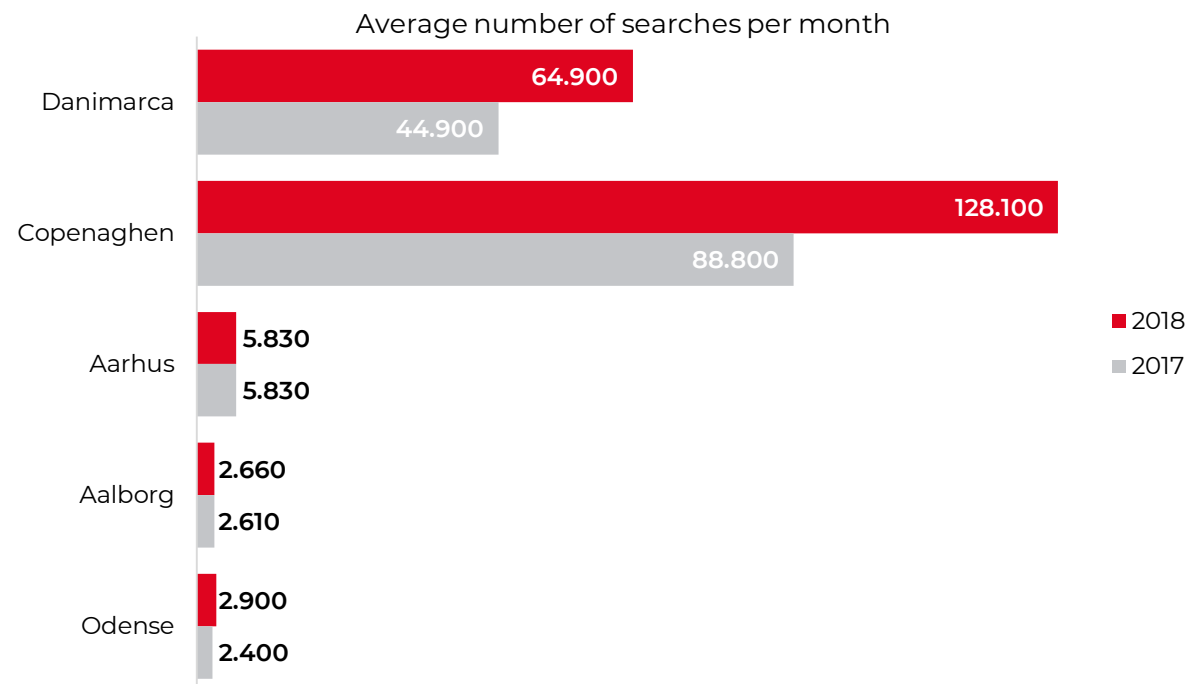
Searches for Denmark

Significantly more searches for Denmark and Copenhagen in 2018

In 2018, *Copenhagen* and *Danimarca* had significantly more searches as search terms than in 2017. With a growth of 21 pct., the search term *Odense* also had more searches in 2018 than in 2017.

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

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 Italian Media

Trends in the Media Landscape

Anna Orlando, PR & Press Manager

“ *Influencers are present in the traditional media (TV, radio and magazines), and the “classic” journalists are visible on the new media platforms. This means that press releases and press tours often provide coverage on numerous platforms.*

The traditional media are still regarded as the most credible and a high quality of content is crucial for good team work and optimal coverage.

Italy accounts for 35 million active users of social media, which is more than half of the Italian population. Most popular is YouTube (87%) followed by WhatsApp (84%) and Facebook (81%); particularly trendy among the 24-35 year-olds. Instagram ranks fourth; especially popular among the very young.

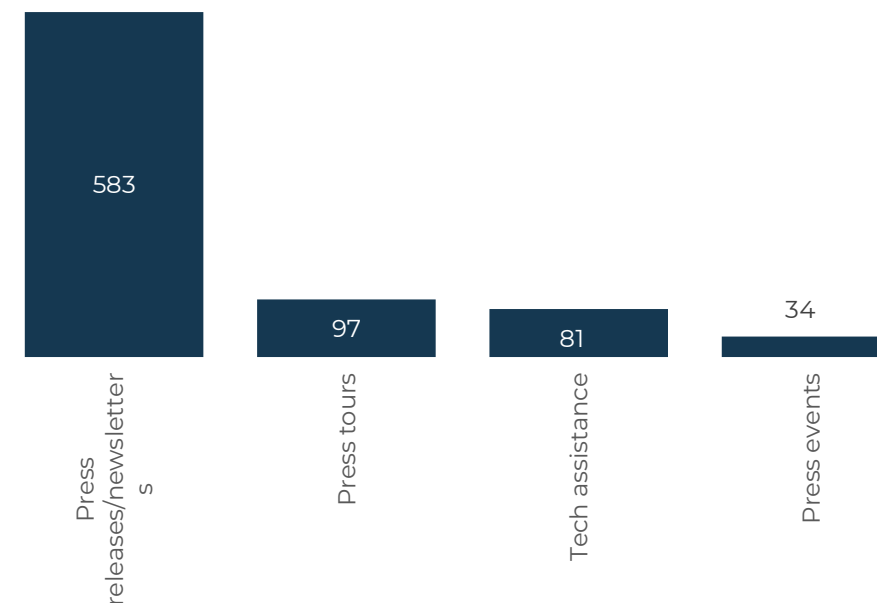
Stimulating coverage in both traditional as well as new media, is the best possible mix to ensure maximum outreach.

We receive an increasing number of requests from top journalists and influencers regarding press tours, confirming the growing interest in Denmark. We cannot meet them all, but with additional partner support we can generate an increase among the Italians for visiting Denmark and getting to know it better, as well as boosting their general enthusiasm for travelling. ”

583 Press Releases and Newsletters in Italy in 2018

In 2018, VisitDenmark’s press activities generated 170 posts / tweets on social media and obtained 104,807 comments, shares and likes.

Number of articles by press activities, 2018



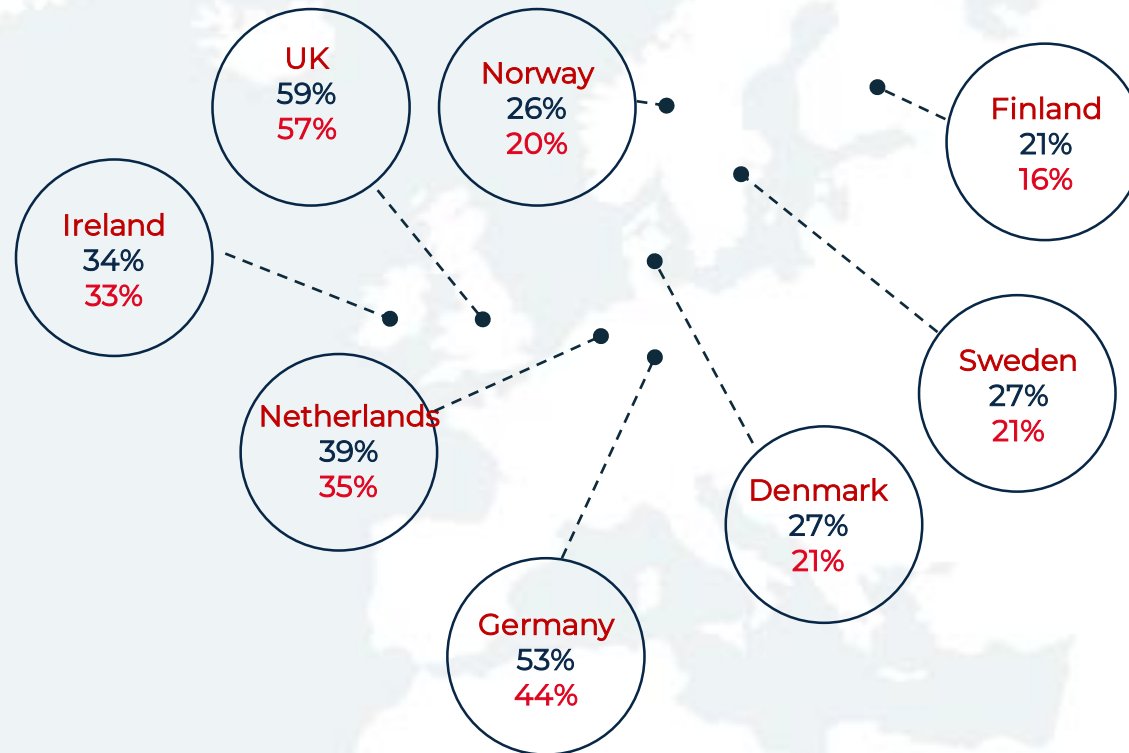


Knowledge, Inspiration and Booking Behaviour

Knowledge of Holiday Destinations

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

■ Milan
■ Rome



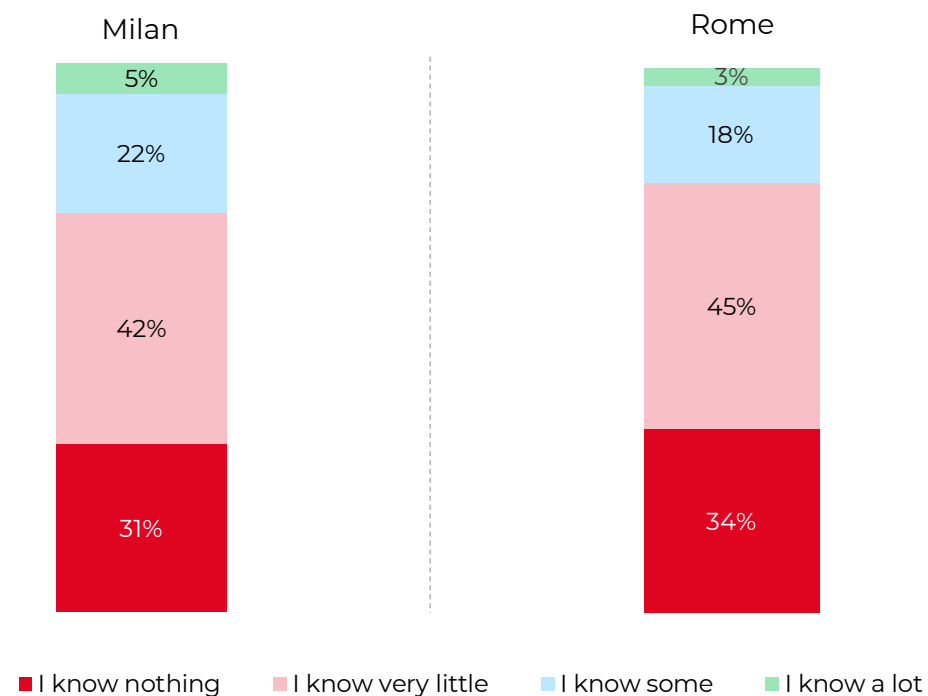
More than two out of 10 Italians know some or a lot about Denmark as a holiday destination

In Milan, 27 pct. of the population know some or a lot about Denmark as a holiday destination, whereas the corresponding numbers in Rome are 21 pct.

Among Italians living in Milan as well as in Rome, the knowledge of Denmark as a holiday destination is equal to that of Sweden and Norway, and superior to that of Finland.

Knowledge of Denmark as a Holiday Destination

How well do you know Denmark as a holiday destination?



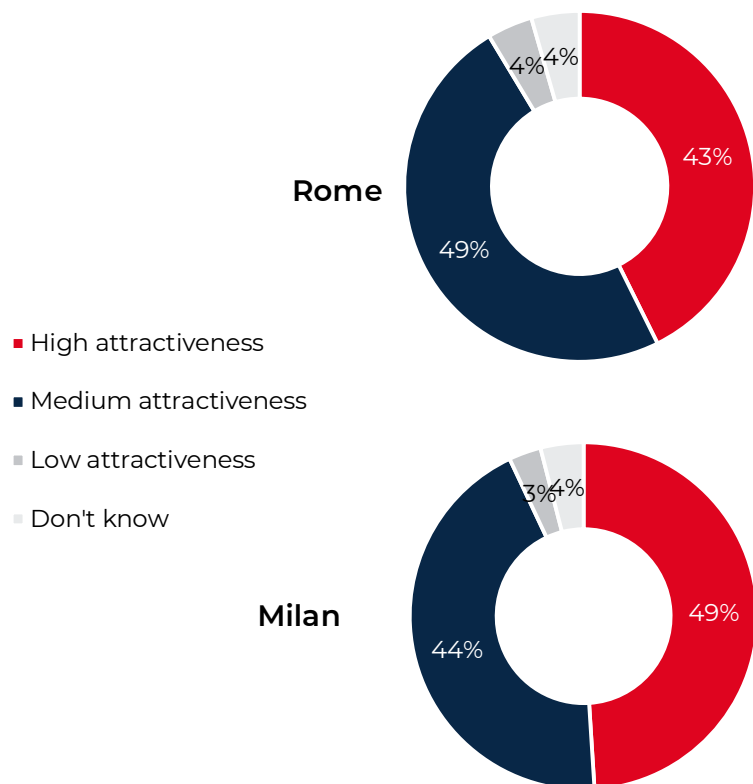
The knowledge of Denmark is greatest in Milan

In Milan, 5% responded knowing a lot about Denmark as a holiday destination, whereas the corresponding number in Rome is 3%. A further 22% in Milan know something about Denmark, while it's 18% in Rome.

As shown in the left chart, the knowledge is slightly greater in Milan than in Rome.

Denmark as an Attractive Holiday Destination

How would you judge Denmark as a holiday destination?



Italians living in Rome and Milan have a good impression of Denmark

Numbers from VisitDenmark's Tourist Survey, 2017, show that the majority of the Italian tourists who visited Denmark in 2017 are happy, and that 47 pct. would actively recommend Denmark at their return.

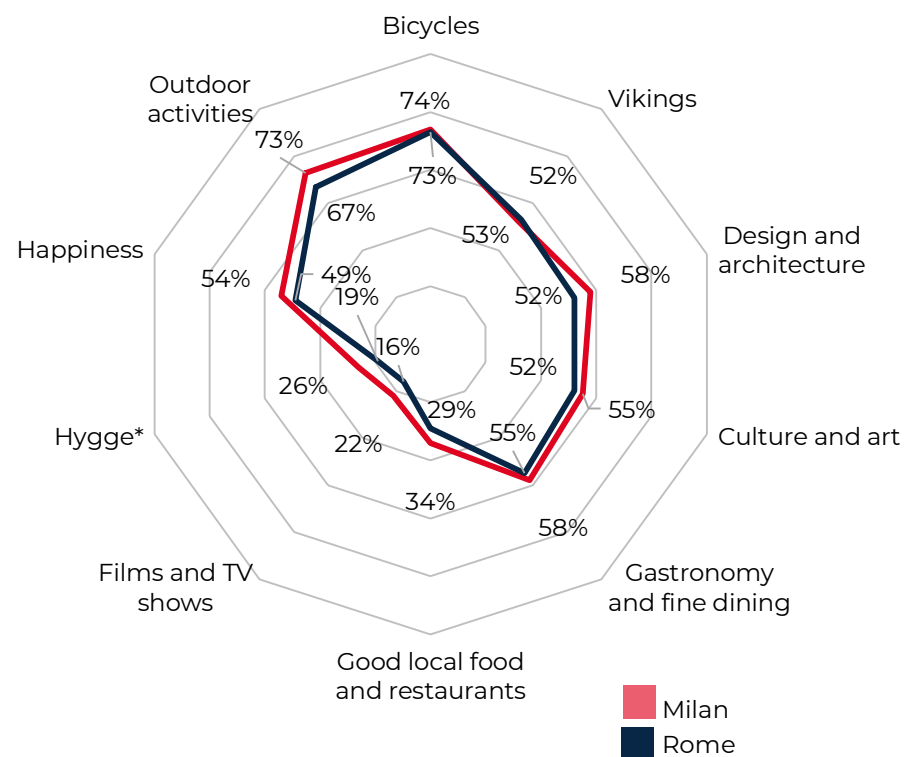
Approximately half of the Italians in Milan and about four out of 10 Italians in Rome view Denmark as an attractive holiday destination. Accordingly, 49% of the Italians in Rome and 43 pct. of the ones in Milan, estimate Denmark's attractiveness to a 6 or a 7 on a scale from 1-7. 1 = not at all attractive and 7 = very attractive.

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

The Italian 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 Italians associate Denmark with bicycles and outdoor activities

The parameters 'bicycles' and 'nature': The perfect combination for outdoor activities (such as cycling, hiking or sports), are what the Italians associate with Denmark.

There is no difference in the responses from Rome and Milan.

About half of the Italians in both cities associate Denmark with the Danish word 'hygge'.

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

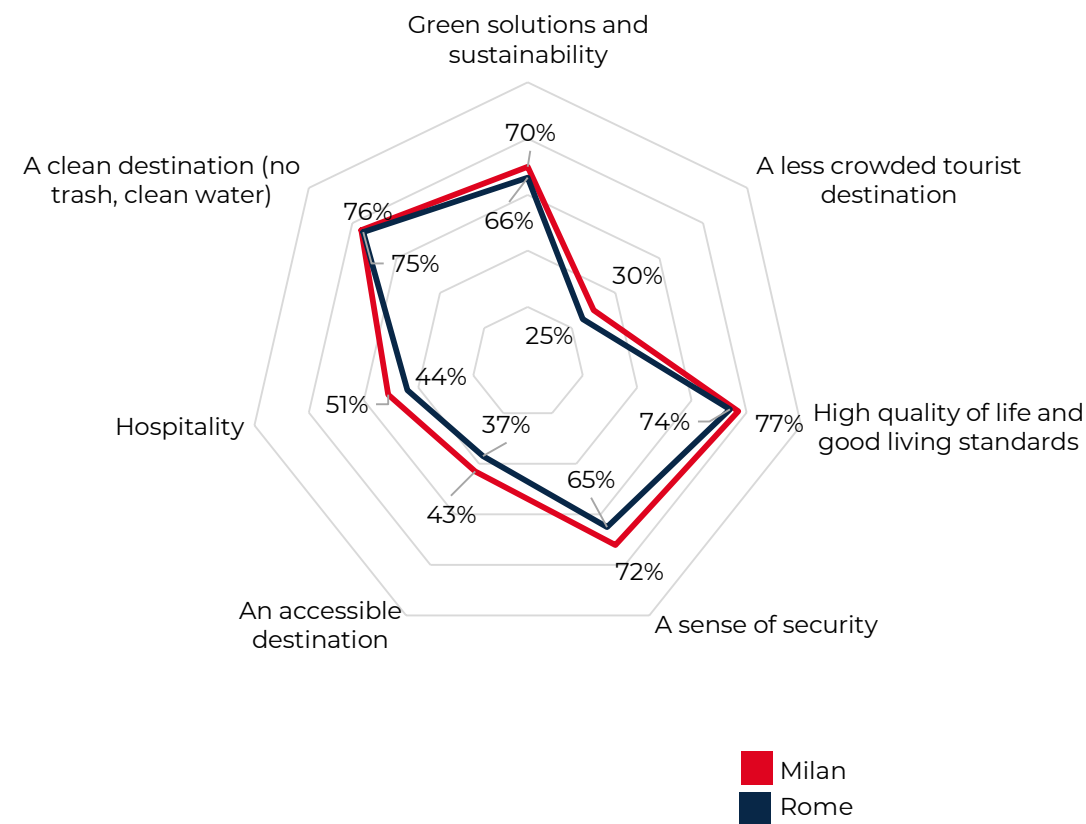
The Italian View on Denmark related to selected parameters of Sustainability

Denmark is mainly associated with the parameter 'high quality of life and good living standards', and a 'clean destination'

Italians in Rome as well as in Milan associate Denmark with the parameters 'high quality of life and good living standards' and 'a clean destination (no trash, clean water)'.

To what degree do you associate Denmark with the following?

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



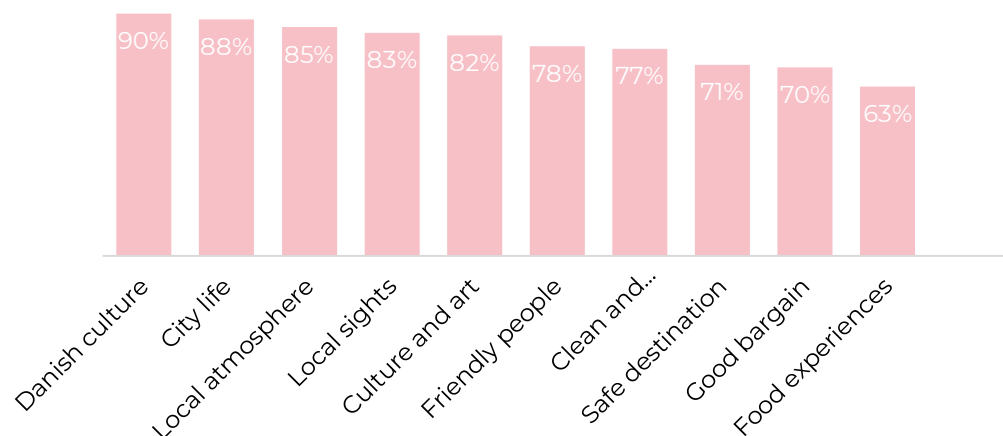
City Breaks: Sources of Inspiration and Travel Motivations

Danish culture and city life are crucial

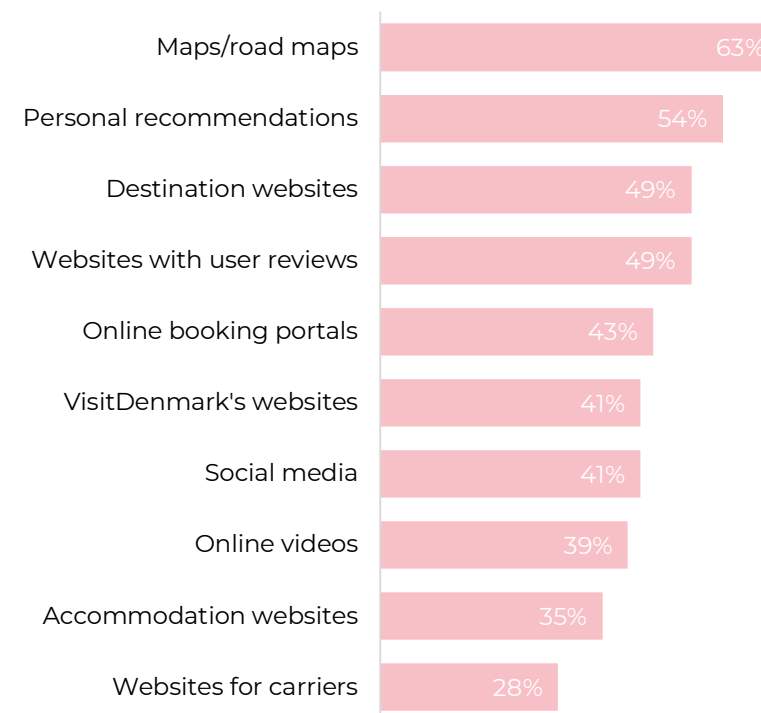
Danish culture and city life are what is most important to the Italians, when they choose to travel to Denmark. Local atmosphere and local sights also play a large part.

Maps/road maps and personal recommendations mainly inspire the Italians to go to Denmark on holiday.

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)

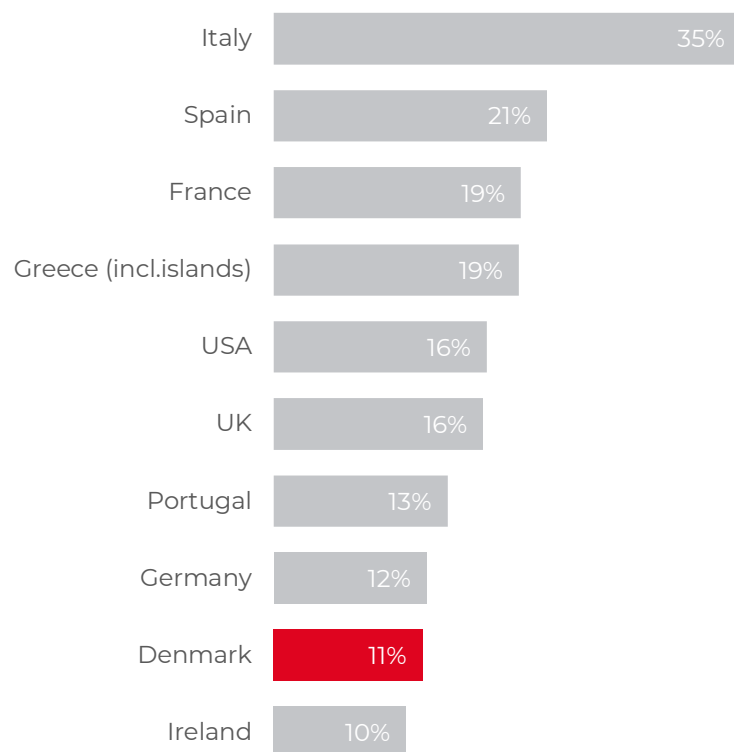


Market Expectations



Milan: Expected Destinations in 2019

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



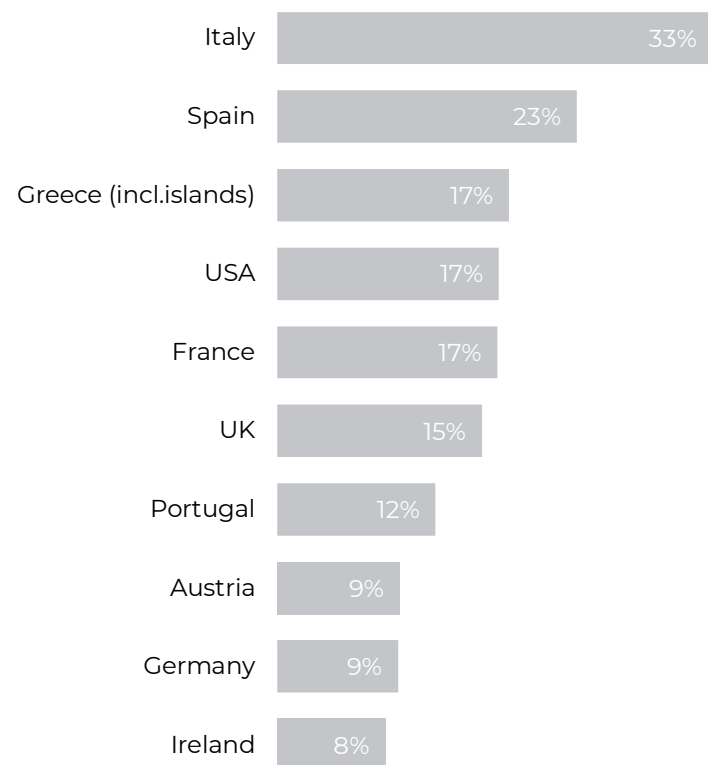
Denmark among the top 10

In Milan, 11 pct. expect to visit Denmark on holiday within the next 12 months. That's approximately 355,000 Italian tourists.

Denmark features in Milan's top 10 of expected destinations. Denmark competes against southern European destinations, such as Spain, France and Greece, as well as against the US and the UK. Denmark is on the top 10 wish list for coastal and nature tourists with kids, and Copenhagen ranks a 7 with city tourists.

Rome: Expected Destinations in 2019

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



305.000 Romans will visit Denmark in 2019

In Rome, 7 pct. of the population expects to visit Denmark on holiday within the next 12 months. That's approximately 305,000 tourists.

Milan: Denmark's Potential in Terms of Business



47%

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

Percentage:

9%
Denmark

42%
Italy



33%

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

Percentage:

18%
Denmark

49%
Italy



37%

of the Italian population would like a city break

Percentage:

22%
Copenhagen

6%
Aarhus

Rome: Denmark's Potential in Terms of Business



48%

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

Percentage:

8%
Denmark

41%
Italy



28%

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

Percentage :

6%
Denmark

54%
Italy



35%

of the Italian population would like a city break

Percentage :

17%
Copenhagen

3%
Aarhus



Knowledge Centre on Tourism in Denmark

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