

Market Profile 2019

UK

09/10/2019



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 Minnesota State Capitol building at sunset. The building's large, ornate dome is the central focus, set against a bright, golden sky. In the foreground, a fountain with multiple jets of water is illuminated. To the left, a large, dark boat is docked. In the bottom right, a small boat with people is on the water, with the sun's reflection visible on the surface. The overall atmosphere is warm and peaceful.

Key Data, Target Groups and Market Expectations

Key Data: Accommodation, Expenses and Turnover

880,000
overnight stays in 2018

10,700
fewer overnights stays than in 2017

-1.2 pct.
increase in overnight stays compared to 2017

3.6 bn DKK
in Tourism Turnover in 2017

4%
of the British are well acquainted with Denmark as a holiday destination



Coastal and Nature Tourism

160,000
overnight stays *



City Tourism

720,000
overnight stays*

2.2 people
tour group

2.9 nights
length of stay

2,300 DKK
daily expenses

The British Target Groups

The British travel as couples



City break
'short break'



Couples
Friends
Couple friends



Hotel
Hostels

Residence



Greater London

Household income



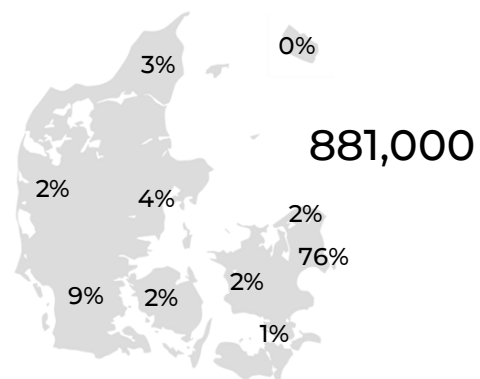
- High
- Low

Education

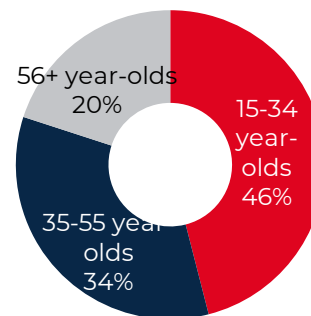


- High
- Low

British overnight stays by regions *



British city tourists in Denmark



Functional necessities



- Weekend getaway to a city
- Safe destination
- Reasonable travel time by direct flight
- Online booking

Emotional necessities



- Switching off
- Quality time
- Mix of recreation and experiences
- Friendly and accommodating population

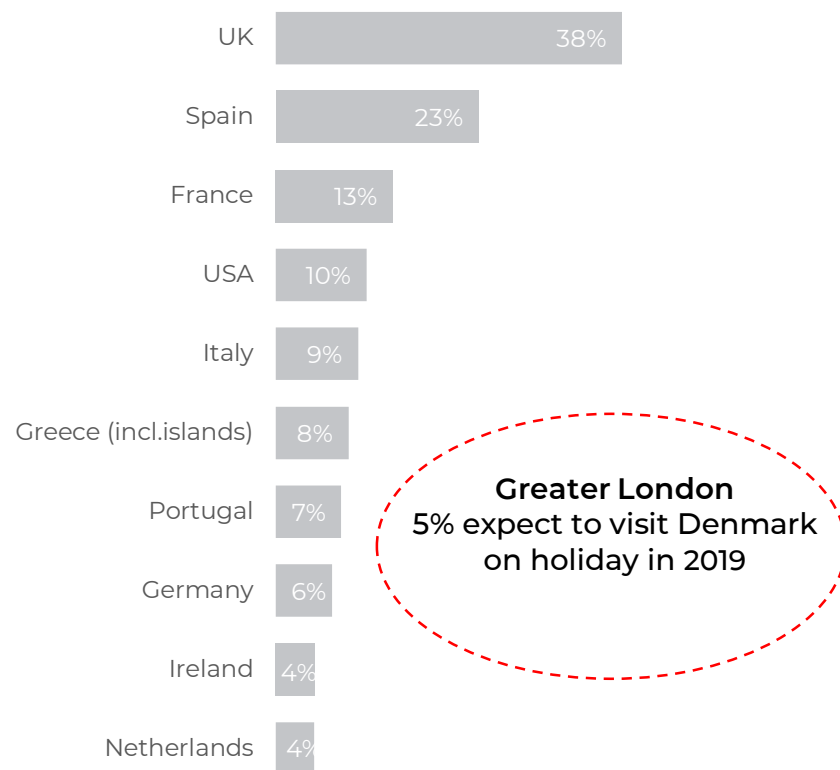
The British perception of Denmark



- The Danish culture
- Pocket-size city
- Royal, historic and modern experiences
- Safe bike city and Danish food specialities
- Culture, history and coastal life

Expected Destinations of the British in 2019

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



Over 1 m Brits are on the look-out for Denmark as a holiday destination

2 pct. among the British expect to go on holiday in Denmark within the next 12 months. That's approximately 1.2 m British tourists who rank Denmark 23rd on the British list of expected holiday destinations.

The Digital Tourist



The Digital Journey of the British (1 / 2)



3 out of 4 are influenced by the internet when choosing Denmark as a holiday destination.

Other factors influencing the choice of Denmark as a holiday destination



Past experiences

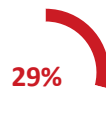


Recommendations from friends and family

INSPIRATION



Have used [visitdenmark.com](https://www.visitdenmark.com) for inspiration and planning.



Have been inspired to travel to Denmark by social media.

Which digital devices do the British use?



77%



53%



74%

RESEARCH/PLANNING

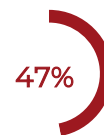
What platforms are used for planning?



Destination websites in Denmark



Online booking portals (such as Airbnb, Booking.com)



Accommodation websites (such as hotels, holiday home rentals)



Websites with user reviews (such as Tripadvisor)

The Digital Journey of the British (2 / 2)



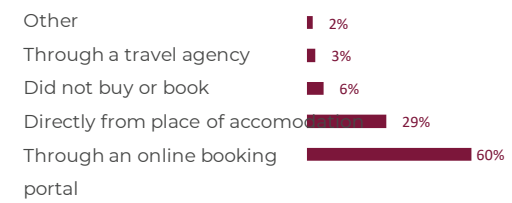
1 out of 3 book their holiday 2-3 months ahead of departure.



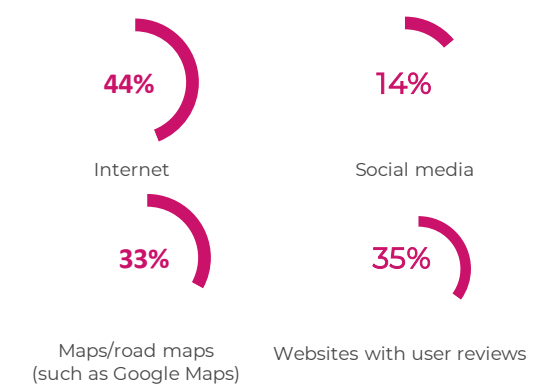
1 out of 3 book up to 1 month ahead of departure.



Where do the British book their accommodation?



What online sources do the tourists use to search for information during their holiday?



Use of offline sources of information during their stay



2 out of 3 are confident that they would recommend Denmark as a holiday destination to friends and acquaintances.



35% Regular tourists



37,000+ British newsletter subscribers in VisitDenmark's database.



49,000+ British followers on VisitDenmark's Facebook page.

Searches for Denmark

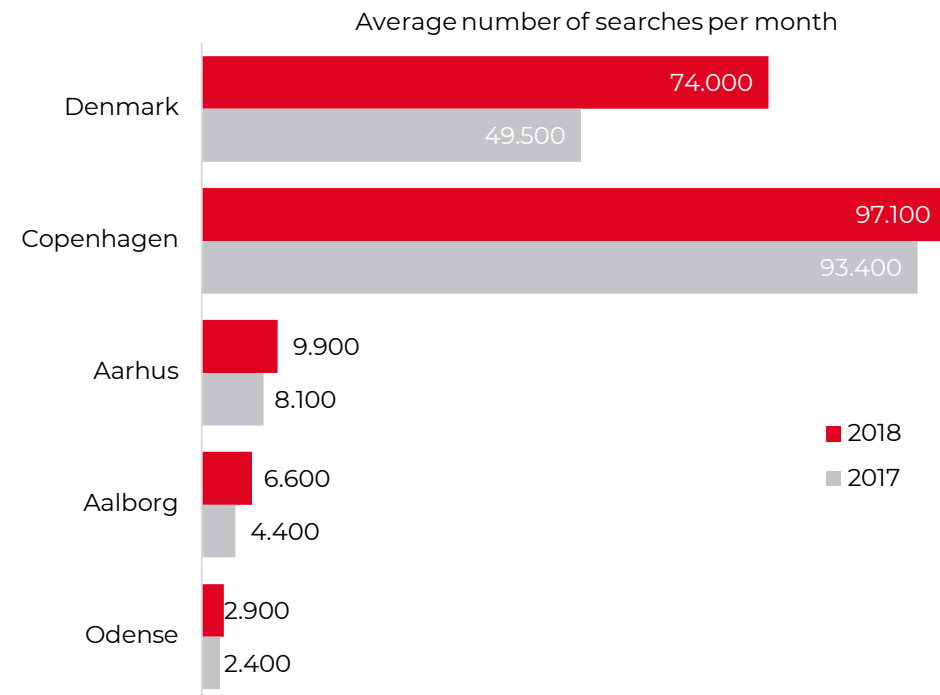
An increase in searches for Denmark and the four largest cities

In the UK, there are more searches for *Denmark* and *Copenhagen* than for *Aarhus*, *Aalborg* and *Odense*.

In 2018, *Denmark* and the four largest cities had more searches as search terms 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



Searches for holiday-related topics

Brits particularly search for information about maps and flights

When Brits search for information about Denmark*, search terms about transportation and activities are used more often than those about accommodation.

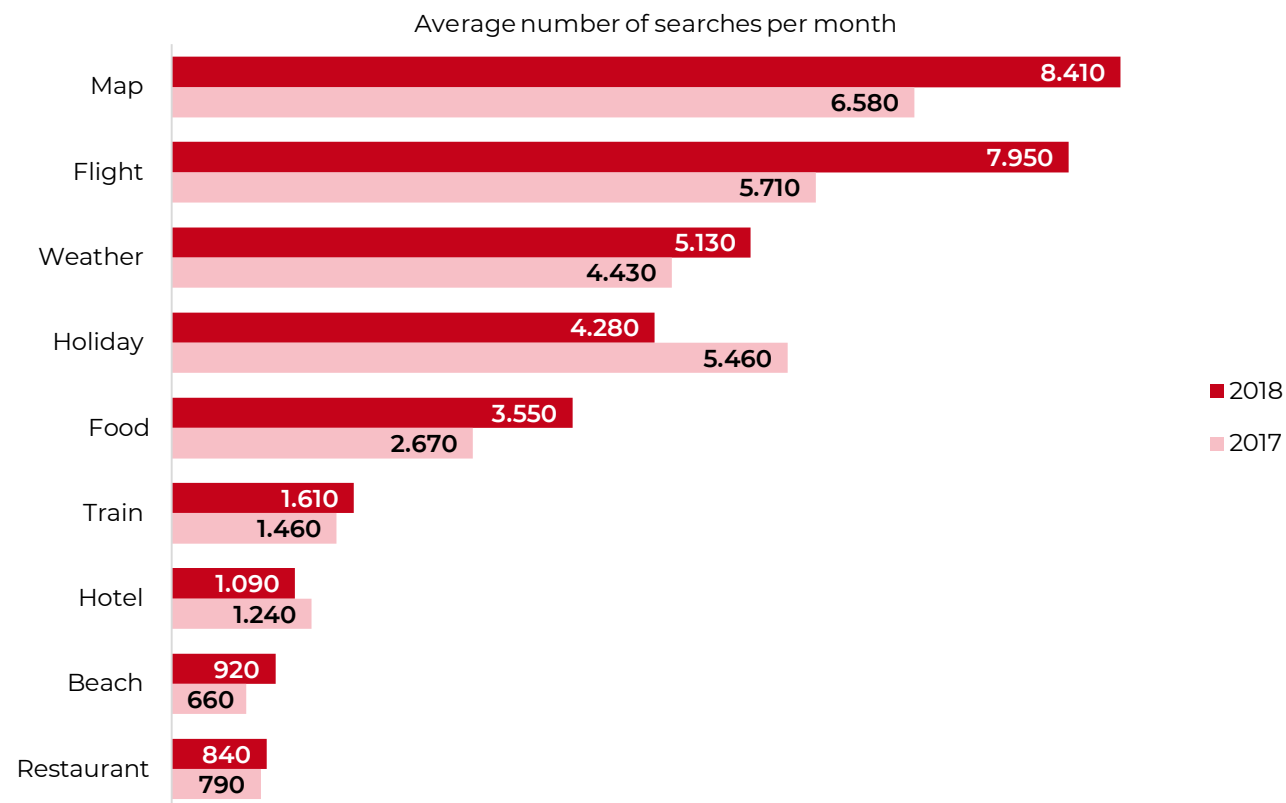
When searching for holiday-related information about Denmark, they are especially interested in information about *weather* and *maps*.

Among search words related to transportation, *flights* and *trains* are predominant.

Search terms about beaches and food experiences (*food* and *restaurant*) in Denmark are among the most common activity-related search terms.

*The search terms usually always contain the words *Denmark* and *Danish* and cover various sentence combinations of searches, such as *Denmark holidays*, *Copenhagen Denmark holidays*, *Denmark family holidays*, *danish holidays* mm

Growth in selected British holiday-related searches for Denmark



Publicity and Visibility in the Media



Denmark in the British Media

Trends in the Media Landscape

Sidsel Møller Christensen, PR & Press Manager

” *The British are still fond of their printed media, even though the media market is evolving digitally as well. National and regional newspapers as well as magazines of all kinds are still published in large print editions, and the travel sections play an important role across platforms.*

The British media are selective and demand novelty, strong themes and unique or different travelling stories with which to attract their readers' attention.

Press visits are the most efficient way of providing in-depth travel articles, while customised news can provide publicity on a smaller scale. Relevant angles might be the opening of new hotels, restaurants, attractions, exhibitions, an anniversary or some other new features.

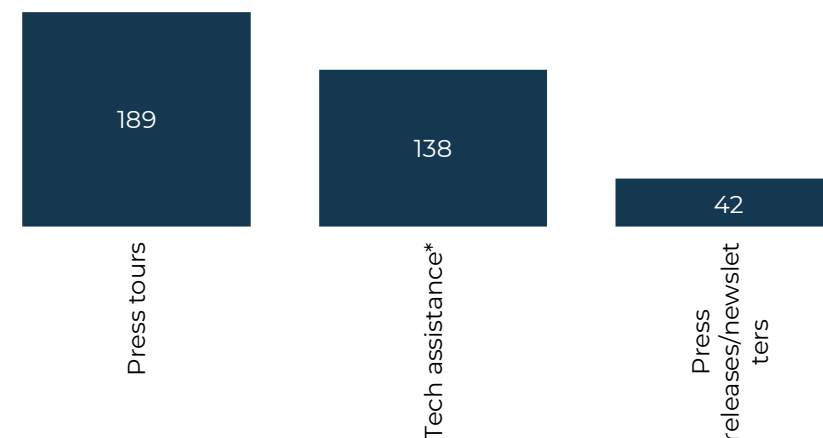
When it comes to Denmark, the media are particularly interested in gastronomy, design, sustainability, local experiences off the beaten track, and Danish lifestyle. Overall, they are fascinated by the high level of quality Denmark has to offer in all aspects of the travelling experience.

”

In 2018, VisitDenmark was mentioned 369 times in the British media and reached approximately 336 m readers.

Most of the publicity was generated by press tours, which also led to the most in-depth and inspiring articles. Tech assistance covered both proactive and reactive pitching, help with visual material or other kinds of information. This was typically publicity on a smaller scale.

Mentions by activity



* Is used if a journalist (either in a meeting, on the phone, or at an event) needs help finding photos, fact-checking an article, coming up with good ideas for an angle, etc.

Publicity in 2018

The 369 mentions were evenly spread across printed and online media

We worked with different media to create publicity in 2018, including:

- *The Guardian*
- *The Observer*
- *i News*
- *The Times*
- *The Telegraph*
- *The Independent*
- *Sunday Times*
- *Zravel Magazine*
- *National Geographic Traveller*
- *LonelyPlanet.com*
- *Lonely Planet Travel Magazine*
- *BA High Life*



Further along the towpath you come to a more sedate grid of greenery where Aalborgers have had their cottage gardens for a century or more. These extremely in-demand plots also have their own rather more dramatic little shrubs. They're meant for storing all that's necessary for tending your garden and bringing around on a summer afternoon. Some looked suspiciously well-lived-on.

MUNTER ("jiggy")
The feeling you get when the sun breaks out on a mackerel grey day.

The northern tip of Denmark literally is a tip. I saw it from 50,000 feet flying over from London a few days after my trip. There it was, a tiny needle of coastline pointing the way to Sweden and Norway. The tip - Ceres - is a big tourist attraction. You park your car and walk for 15 minutes along a big empty beach, a charging sea to your right, an endless horizonland of dunes on your left, or take the path and "Sanderson" Inn that ferries the less active to sand for. But this is not in fact. Most of the tourists are Danes, and by definition, whenever their age - they're in action.

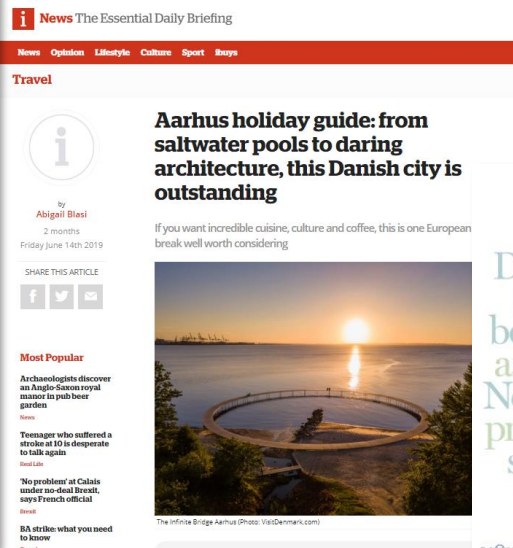
Back at home you check the size of America's Michigan on above the horizon, reluctantly lodging from time to time to show a pool of cool Scandinavian blue to show though, I don't mind. If I'd wanted blue skies and sweltering heat there was a whole other Europe to the south. There the sun comes on, the sunbake comes off, and moustaches abound.

The reason people come here is to stand in the sea. Or rather, the sea. That left foot is the Skagerrak belonging to the North Sea, your right is in the Kattegat - or Baltic. There, it's the Great Cannon, but it's free, and curiously poetic. That may be why the great Danish poet Hjalmar Brandaer chose to be buried here, his hands flatting this square with moustache of a darker color. Curious WWII bunkers, I don't know, the waters where so many lives were lost in an earlier conflict, the Battle of Jutland in 1916.

GLÆDE ("pleasure" - "happiness")
The feeling you get when you're outdoors with friends and family, cycling, running, walking, eating.

Skagen is well known to British tourists to have its own English name. The town. Not surprisingly, the Danish southern people don't reach to a word that sounds like a new line in expatriate horror movies. Besides, there's an important word and acronym brand, founded by two local men based in the USA, that's doing pretty well for the Skagen name globally recognized. (Note: your pronunciation is "Skay-on")

In historic terms, Skagen, or Hjørring, the





Knowledge, Inspiration and Booking Behaviour

Knowledge of Denmark as a Holiday Destination

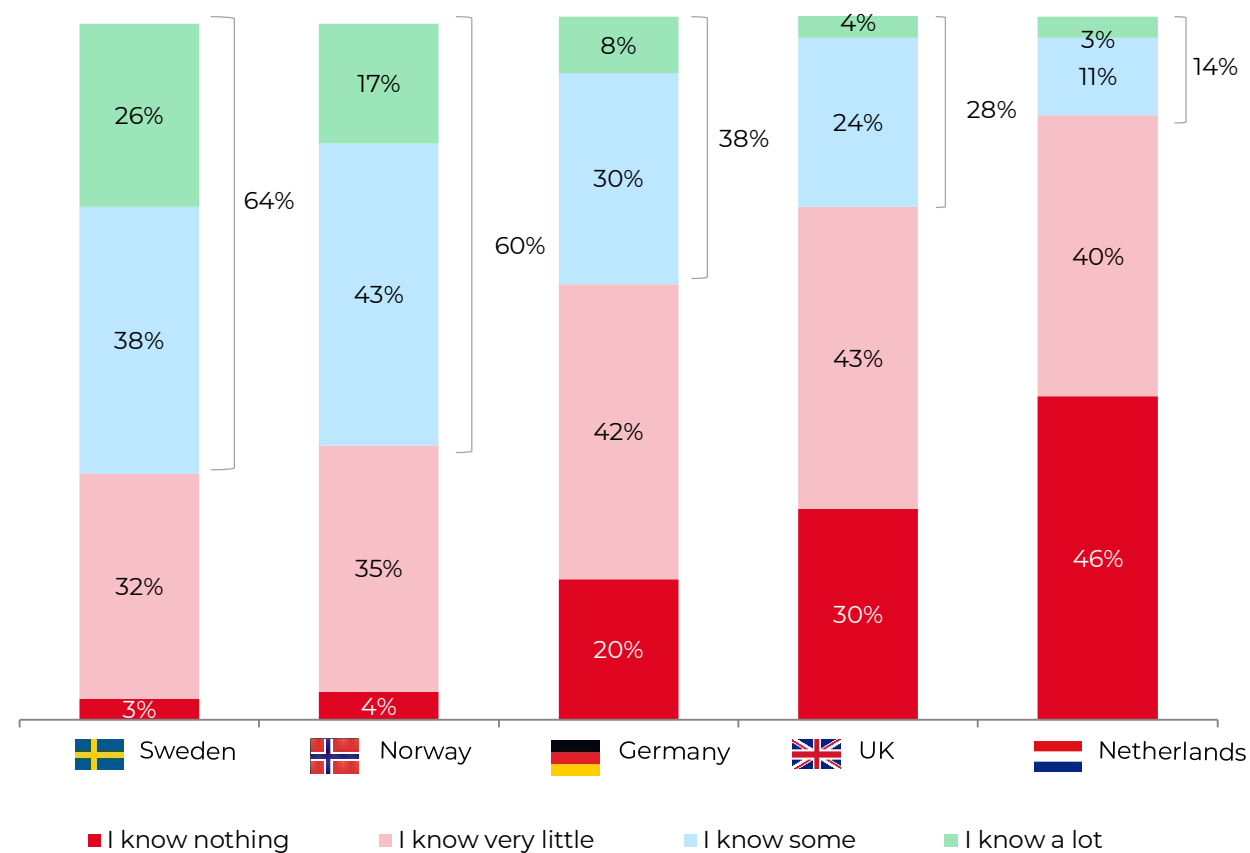
About four out of 10 in Greater London are well acquainted with Denmark

28 pct. of the British are acquainted/very well acquainted with Denmark as a holiday destination.

Looking exclusively at the British in Greater London, 42 pct. are acquainted or very well acquainted with Denmark.

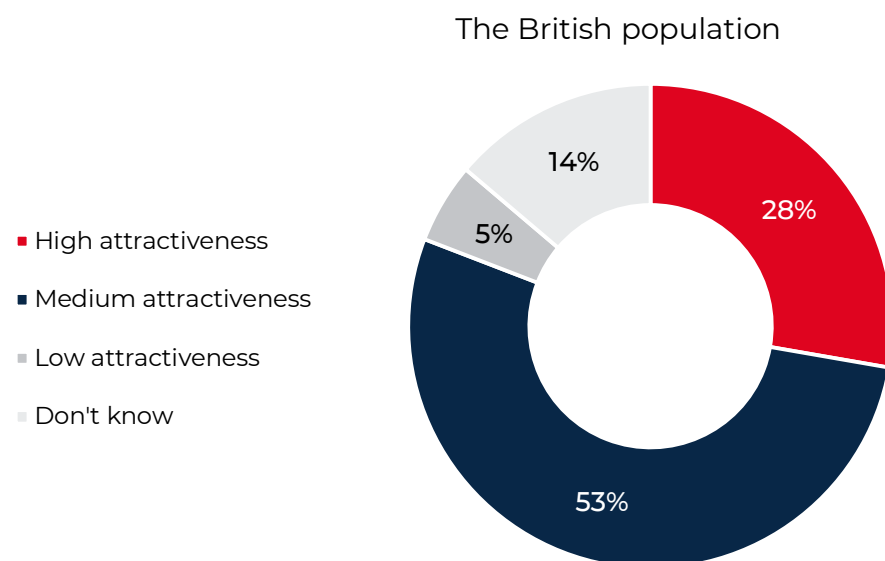
How well do you know Denmark as a holiday destination?

(N: Netherlands = 1.503, UK = 1.508, Germany = 2.118, Norway = 805, Sweden = 807)



Denmark as an Attractive Holiday Destination

How would you judge Denmark as a holiday destination?



The British have a good impression of Denmark as a holiday destination

Overall, almost three out of 10 British people find Denmark to be an attractive holiday destination. 28% of the British 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.

There is a considerable difference between the UK in general and Greater London when it comes to Denmark's attractiveness as a holiday destination. VisitDenmark's marketing activities focus on Greater London.

In Greater London, significantly more people (37 pct.) point to Denmark as an attractive or very attractive holiday destination, than the rest of the UK in general.

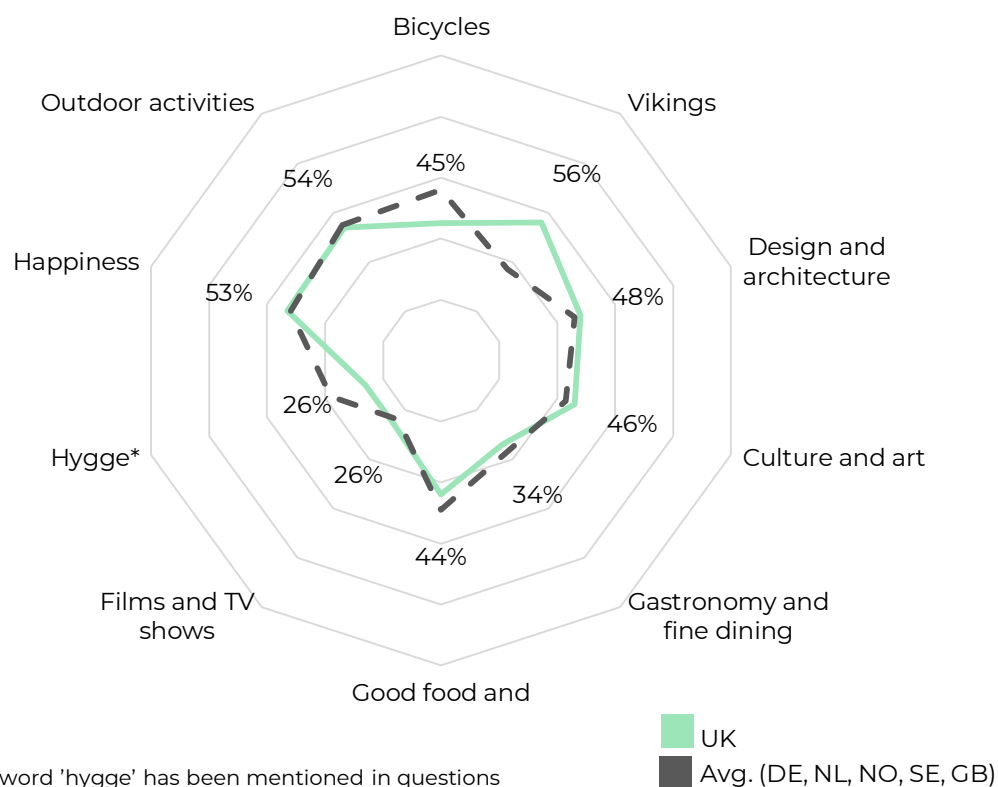
Happy guests are paramount to recommendations of Denmark, during and after their stay. Personal recommendations are often key, when the British pick their holiday destination.

Numbers from VisitDenmark's Tourist Survey, 2017, show that the majority of the British guests are happy and that 65 pct. would actively recommend Denmark at their return.

The British 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

The British particularly associate Denmark with vikings, outdoor activities and happiness

More than one in two of the British people associate Denmark, to a high or very high degree, with vikings (56 pct.), outdoor activities (54 pct.) and happiness (53 pct.).

Compared to the average, 'Vikings' scores higher among the British. Adversely, 'bicycles' and 'hygge' score lower.

The British view on Denmark related to selected Parameters of Sustainability

Denmark is mainly associated with the parameter 'a clean destination'

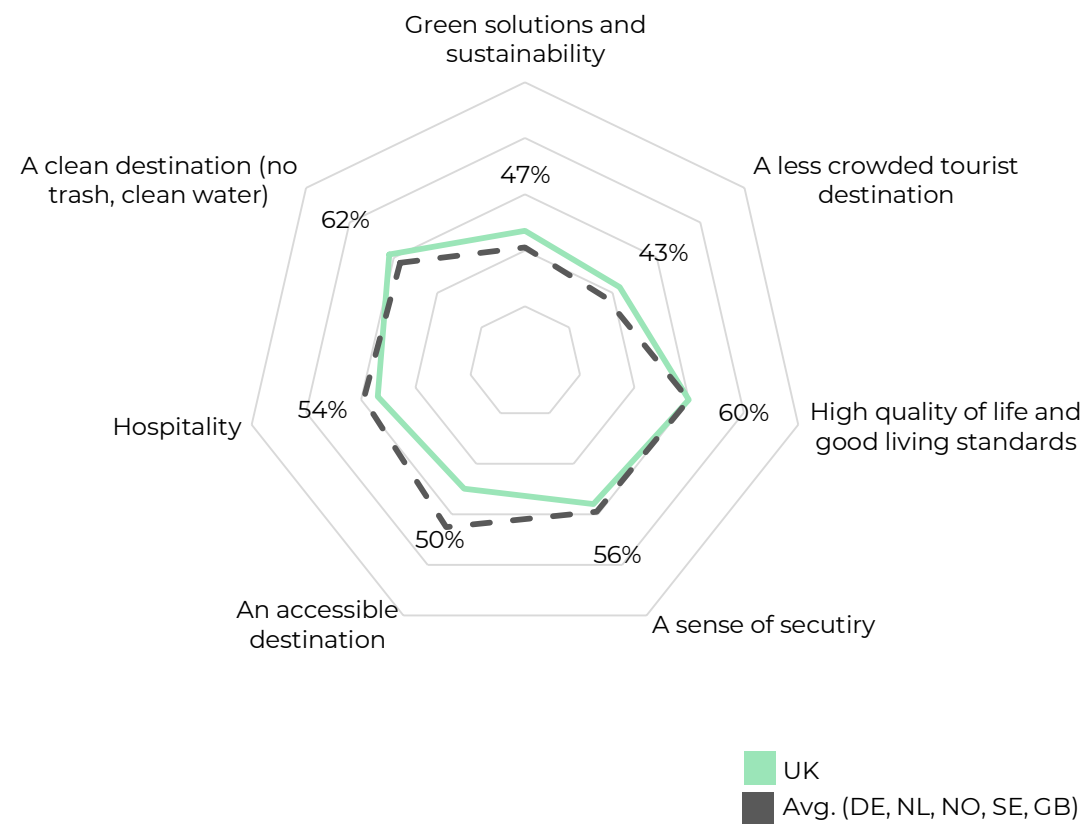
When asked directly, the British particularly associate Denmark with the parameters 'a clean destination (no trash, clean water)' as well as 'high quality of life and good living standards'.

On all parameters, the British score on the same level or slightly above the average of the UK, the Netherlands, Norway, Sweden and Germany.

The only exception being the parameter 'an accessible destination', where the British score is lower than average.

To what degree do you associate Denmark with the following?

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



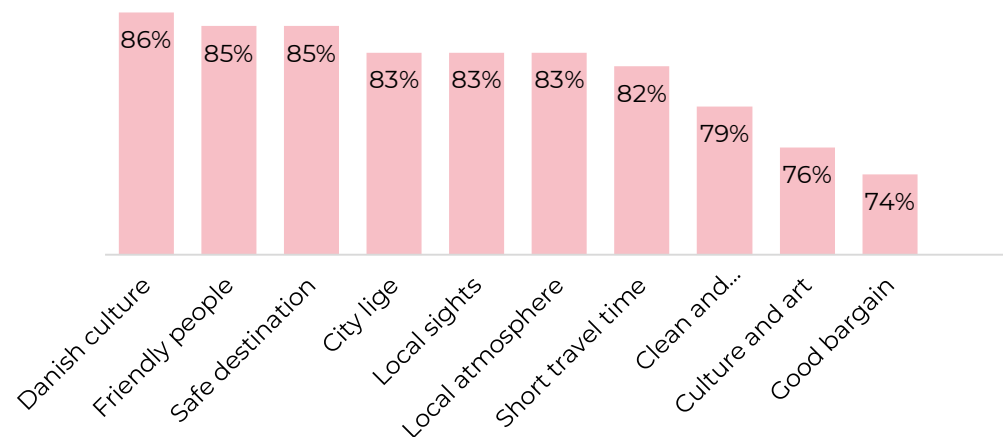
City Breaks: Sources of Inspiration and Travel Motivations

Danish culture is crucial

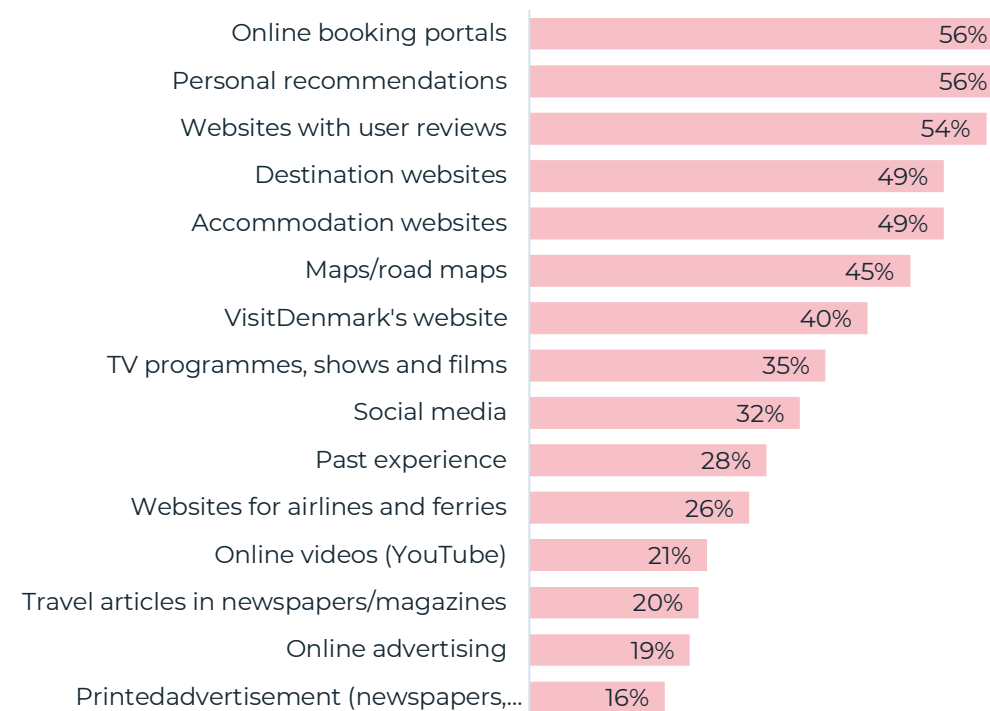
Danish culture is crucial for the British when they choose to travel to Denmark. A friendly population and a safe destination take second and third place.

The British find their inspiration to go on holiday in Denmark mainly through booking portals, personal recommendations from friends and family as well as through websites with user reviews. In the top 15, we also find travel articles in printed newspapers/magazines and advertisements.

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 15
(Multiple possible answers)

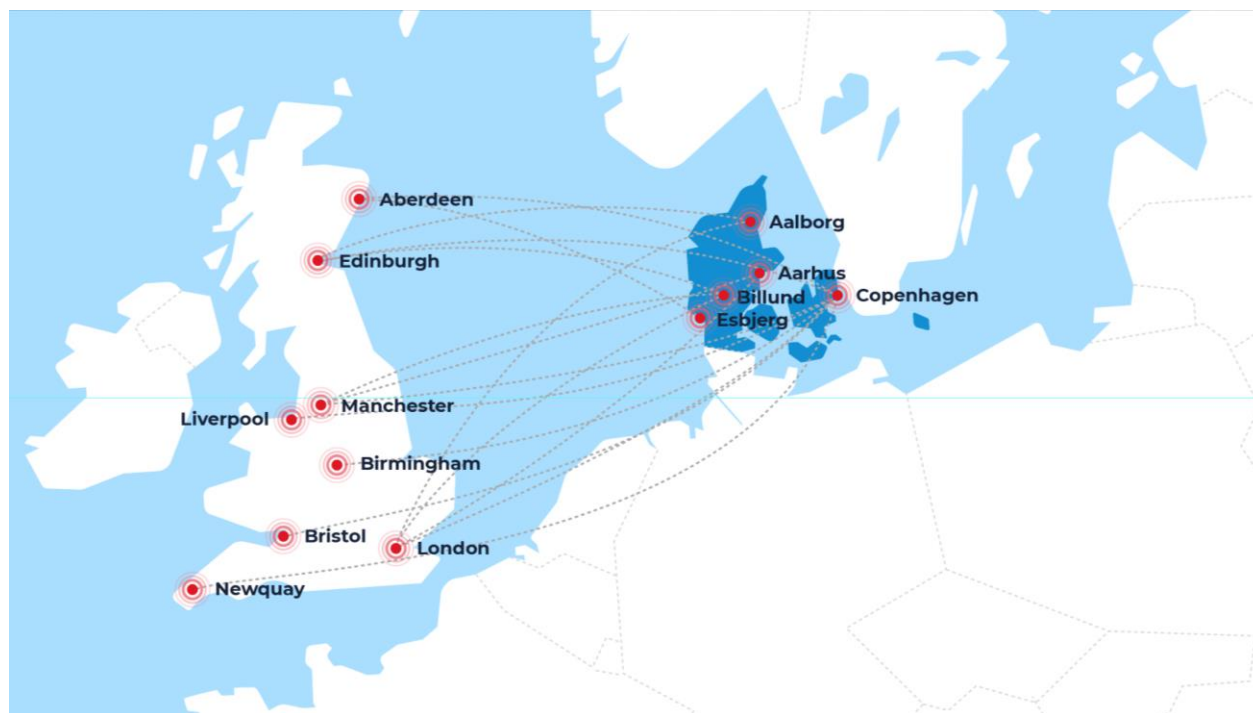




Flight traffic from the UK to Denmark

Flight Routes between the UK and Denmark

There are many routes to Denmark from the UK, some of which are direct flights.



Departure	Airline	Arrival
London Heathrow	BA, SAS	Copenhagen
	BA	Billund
London Gatwick	Norwegian Air, EasyJet, SAS	Copenhagen
	EasyJet	Aarhus**
Manchester	SAS, EasyJet	Copenhagen
	SAS	Aarhus
	BA	Billund
London Stansted	RyanAir	Copenhagen
	RyanAir	Aalborg
	RyanAir	Aarhus
	RyanAir	Billund
London/Luton	SAS, RyanAir	Copenhagen
Edinburgh	RyanAir, Norwegian Air, EasyJet, SAS	Copenhagen
	Great Dane Airlines	Aalborg*
	RyanAir	Billund
Birmingham	SAS	Copenhagen
Bristol Airport	EasyJet	Copenhagen
Aberdeen	SAS	Copenhagen
Southend	RyanAir	Copenhagen
Liverpool	RyanAir	Copenhagen
London City	BA Cityflyer	Copenhagen*
	BA	Billund
East Midlands	RyanAir	Copenhagen*

*Summer route

**Winter route

A row of fishing nets is laid out on a wooden frame on a beach at sunset. The nets are silhouetted against a vibrant sky with shades of purple, pink, and orange. The foreground is a dark, pebbly beach.

Accommodation, Turnover and Seasonality

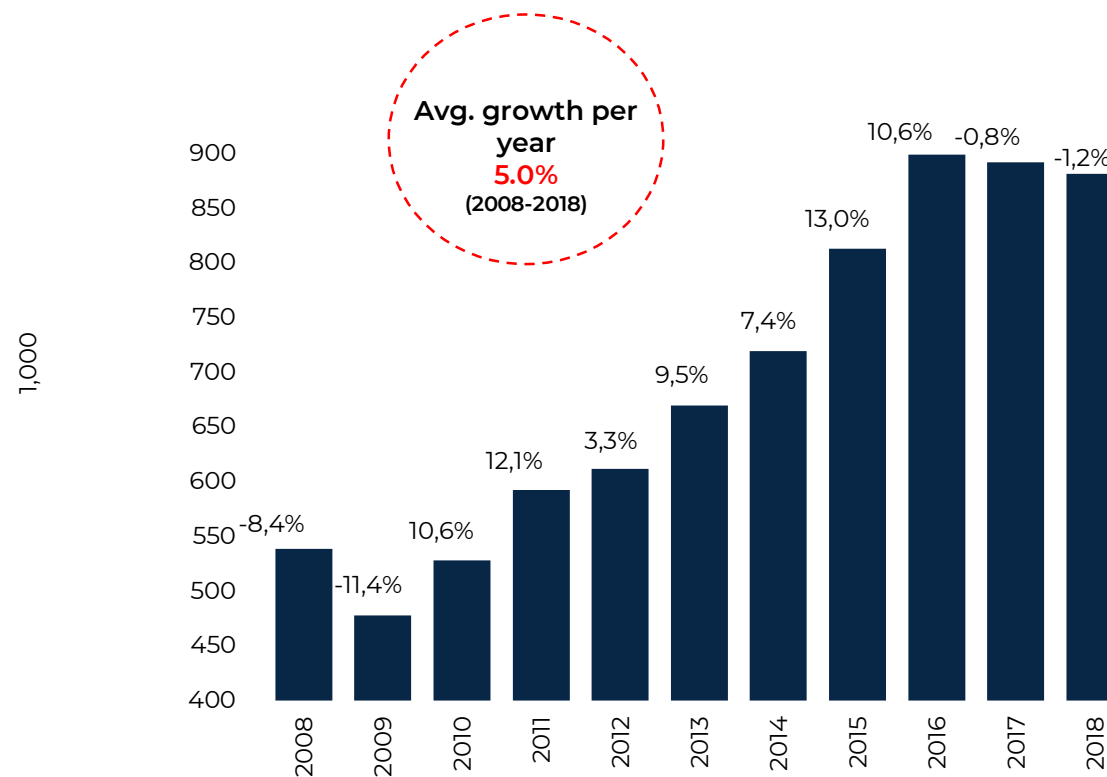
Growth in British Overnight Stays

Drop in the number of British overnight stays in Denmark

The British spent a total of almost 900,000 nights in Denmark in 2018.

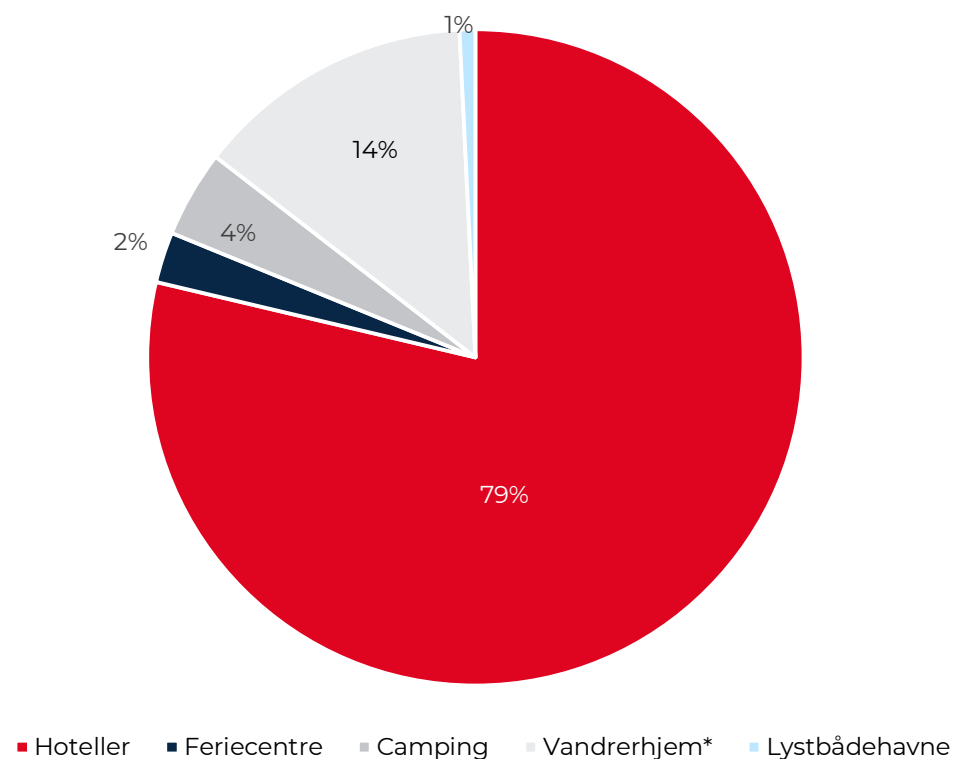
Compared to 2017, the number of British overnight stays dropped by 1.2 pct.

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

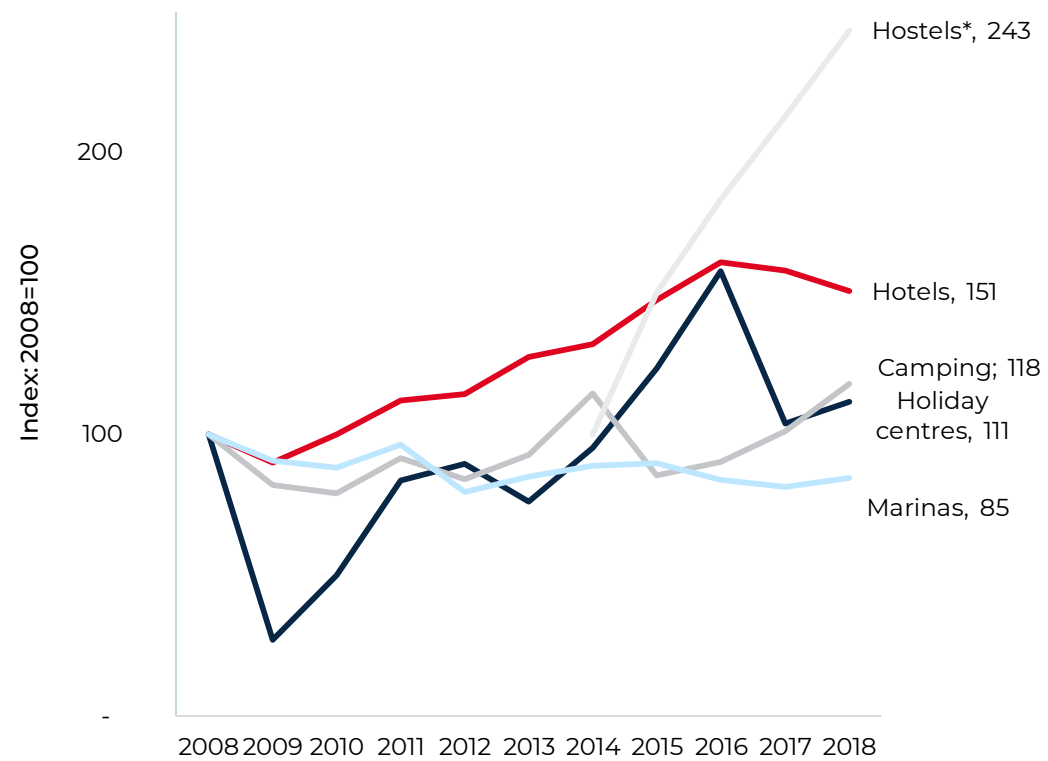


British Overnight Stays by Accommodation Types

British Overnight Stays in Denmark, 2018



Growth in British Overnight Stays in Denmark



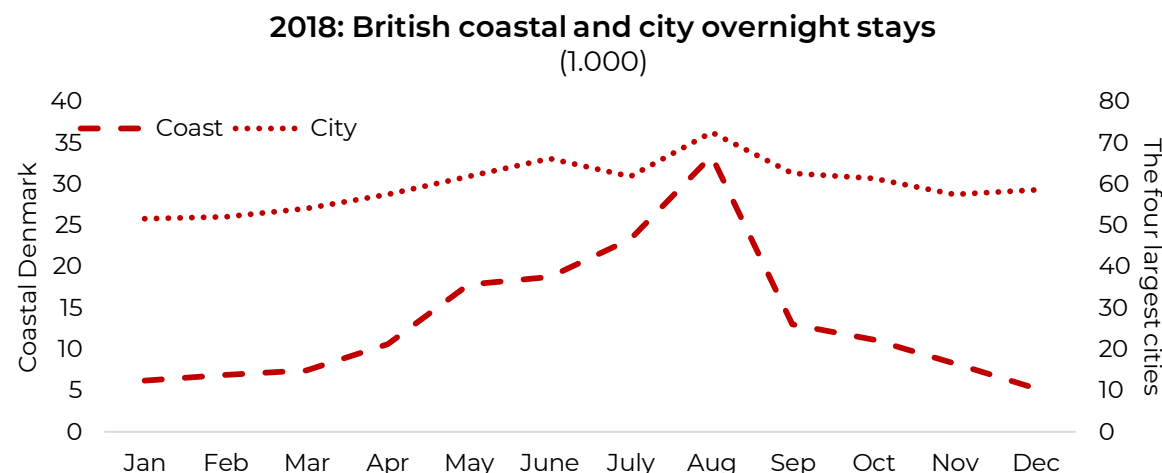
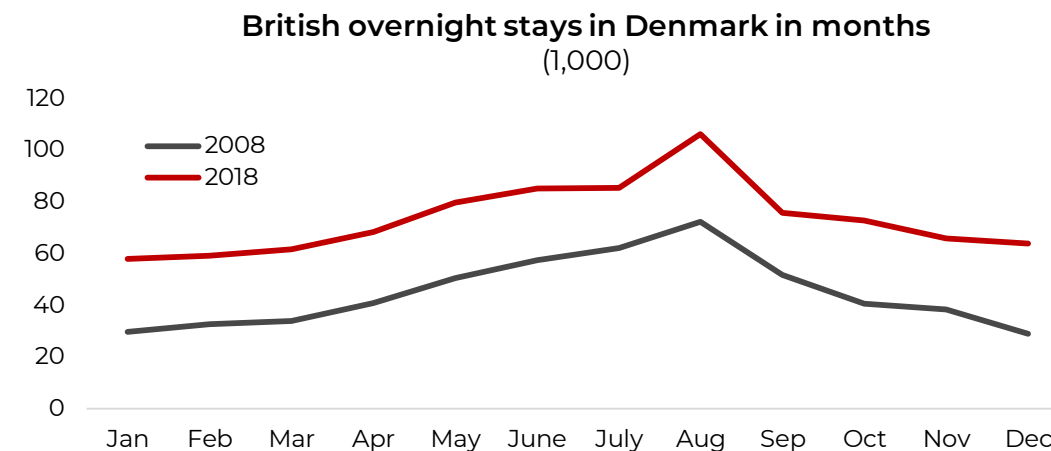
British Overnight Stays Throughout the Year

More British overnight stays in peak as well as in off-peak seasons

From 2008 to 2018, the number of British overnight stays in Denmark has increased by 64 pct. The increase is to be found during all seasons: high, shoulder and winter.

	2008	2018	2008	2018
	Number (1,000)		Index (2008=100)	
High	134	191	100	143
Shoulder	275	443	100	161
Winter	130	247	100	190
Total	539	881	100	164
	2008	2018	2008	2018

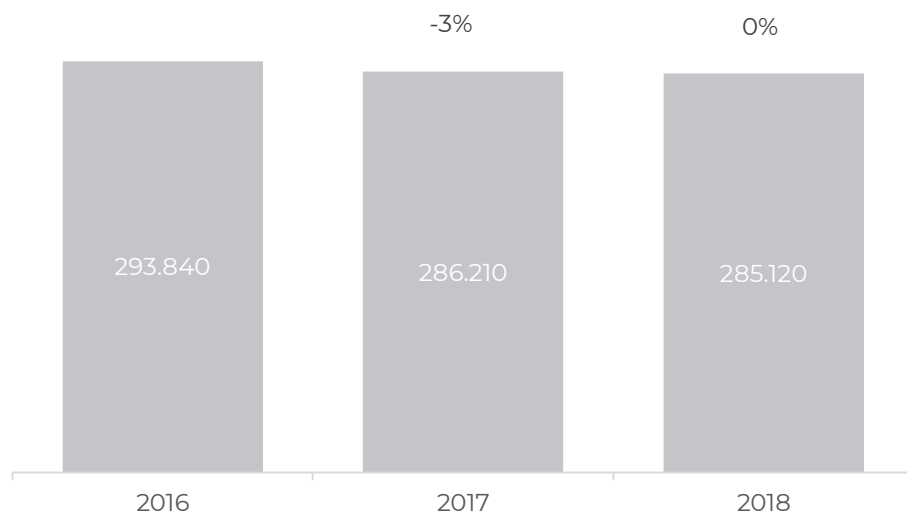
The pattern in overnight stays among the British on city breaks in Denmark, is – not surprisingly – different from the one regarding coastal and nature tourists. This means that the curve for city tourists’ overnight stays is slightly more flattened (spread out more evenly throughout the year) than the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



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

British Overnight Stays with Airbnb

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



Stable level for British overnight stays with Airbnb

The number of British overnight stays with Airbnb has remained the same from 2017 to 2018, and is still slightly below the 2016 level.

Looking closer into the distribution of the number of overnight stays between cities and coastal areas, about two thirds of the British overnight stays take place in one of the four largest Danish cities.

British 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	Copenhagen	Aarhus	Aalborg	Odense
2018	66,510	218,610	197,010	12,474	3,380	5,743
Pct.	23 pct.	67 pct.	90 pct.	6 pct.	2 pct.	3 pct.

Accommodation at Home and Abroad

	British overnight stays 2018 (1,000)	Percentage of European overnight stays	Growth from 2017 to 2018
UK	368,225		0%
Europe	273,268		3%
The rest of the world	209,507		5%
Total	851,000		2%
France	83,523	31%	6%
Spain	82,168	30%	-1%
Ireland	20,801	5%	7%
Italy	14,167	4%	1%
Greece	12,151	3%	-8%
Portugal	9,426	2%	5%
Cyprus	6,113	2%	5%
Germany	5,886	2%	34%
Turkey	5,696	2%	8%
Malta	4,612	2%	-1%
Netherlands	4,603	2%	8%
Croatia	4,111	1%	2%
Austria	3,800	1%	13%
Belgium	2,057	1%	10%
Bulgaria	1,656	1%	2%
Switzerland	1,654	1%	2%
Poland	1,378	0%	-8%
Czech Republic	1,246	0%	3%
Hungary	1,052	0%	-2%
...			
Denmark	0.9	0%	-1%

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%
Netherlands	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%

UK	Turnover 2017 (m DKK)	Percentage
Visits w. paid accommodation		
Hotel – holiday	1144	38%
Hotel – business	1,103	37%
Holiday centre	28	1%
Camping	37	1%
Hostel	97	3%
Rented holiday home	0	0%
Yacht	6	0%
Sharing Economy platforms	549	15%
Other*	35	2%
Total	2,998	83%
Visits with free accommodation		
Total	621	17%

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

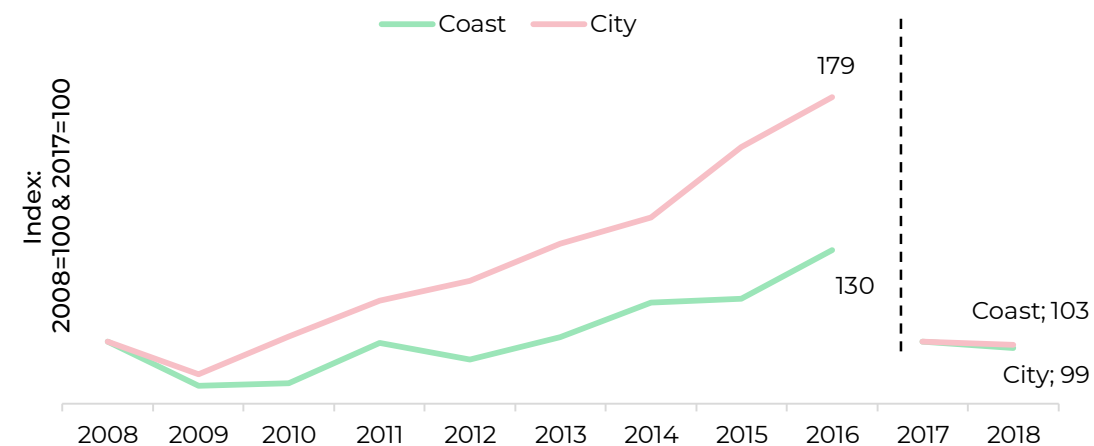
- Include festivals, cruises and farm houses
- '0' specifies values <0.05 m DKK '-' specifies the value 0

British Overnight Stays by the Coasts and in the City

British overnight stays in Coastal/Rural Denmark as well as in the four largest cities

	2017 (1,000)	2018 (1,000)	Gwth.
Coastal/rural Denmark*	166	162	-2.0%
The four largest cities*	726	719	-1.0%
Total*	892	881	-1.2%

Growth in British overnight stays* by the coasts and in the city



Source: Danmarks Statistik.

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.



Knowledge Centre on Tourism in Denmark

www.visitdenmark.dk/corporate/videncenter

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