

Market Profile 2019

US

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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Market Potential & Key Data



Market Potential

- The number of American overnight stays in Denmark is historically high – even outside of Copenhagen.
- With a total of 787,000 overnight stays in 2018, the Americans came in first as long-haul destinations go. China came in second with 235,138* overnight stays.
- With a growth of 96% from 2012-2017, Denmark is among the top 10 list of growing overseas destinations** chosen by Americans
- A record number of Americans in 2019 own a passport (42% out of 320 m inhabitants.)



Key Data: Accommodation, Expenses and Turnover

787,000
overnight stays in 2018

78,200
additional overnights stays than in 2017

11.0 pct.
increase in overnight stays compared to 2017

3.4 bn DKK
in Tourism Turnover in 2017



Coastal and Nature Tourism

75,000
overnight stays*



City Tourism

712,000
overnight stays*

2.6 people
tour group

2.7 nights
length of stay

2.300 DKK
daily expenses

A photograph of a cemetery path lined with trees in autumn. The path is paved and leads into the distance. The trees have yellow and orange leaves, and the sun is shining through the branches on the right side. The text "Target Groups" is overlaid in the center of the image in a large, white, sans-serif font.

Target Groups

The American Target Groups

The Americans travel as couples



City break



Couples
Friends
Couple friend



Hotel
Airbnb

Residence



The East Coast, the West Coast, Texas and Chicago

Household income



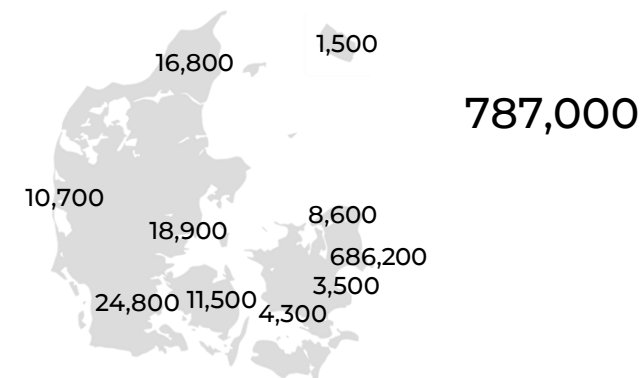
- High
-
- Low

Education

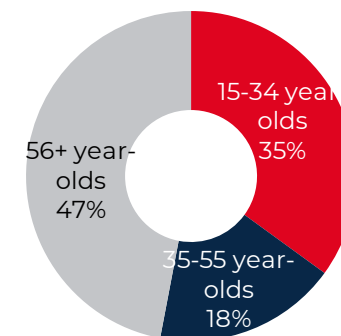


- High
-
- Low

American overnight stays by regions *



American city tourists in Denmark by age



Why the Americans Visit Denmark

Functional necessities



- Safe and clean destination
- Good public transportation and short distances
- Good for stopovers (Denmark can easily be combined with other Nordic/European cities)
- Good flight connections

Emotional necessities



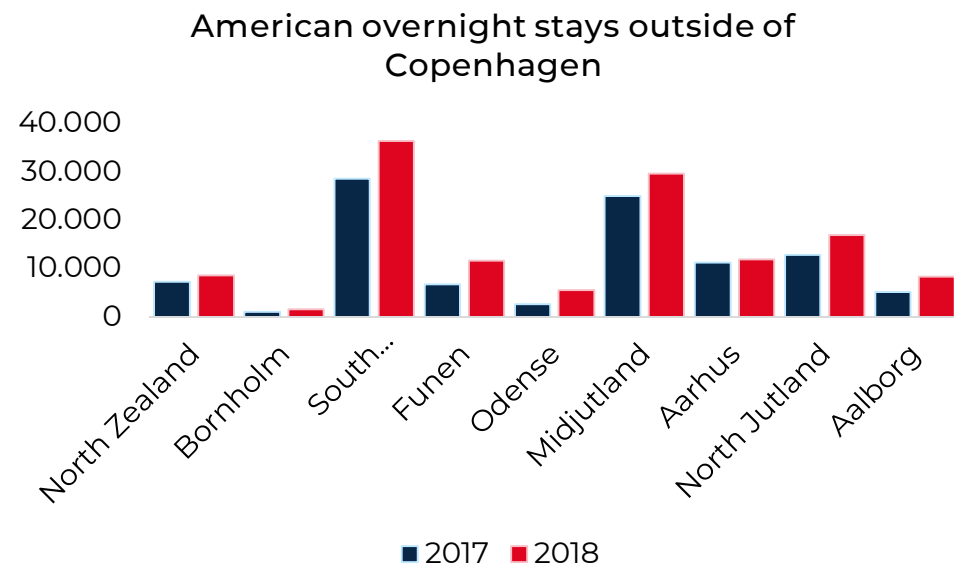
- Local experiences
- Local atmosphere
- Danish culture
- Unique experiences

The American perception of Denmark



- Pocket-size destination
- “Hygge” and a particular attention to quality of life
- Safe bike city
- Innovative and sustainable capital city
- Rich in design, gastronomy and architecture
- Interesting history

Potential Outside of Copenhagen Too



The numbers show an increasing interest with Americans in exploring Denmark outside of its capital.

Efficient transport, nationally as internationally, support the vast potential for getting more Americans to experience the Danish regions.

Geographical Distances: US vs. Denmark



The US traveler views distances very differently than the Danes. A trip from Copenhagen to Aalborg by car is not a problem.

For the Americans, a lay-over is a natural part of getting from A to B.

With an annual average of eight days of travelling, the Americans want to see as much as possible, which is why they often visit several countries on a single trip and many of them combine their holiday in Denmark with a Scandinavian roundtrip

The Value of an American Tourist

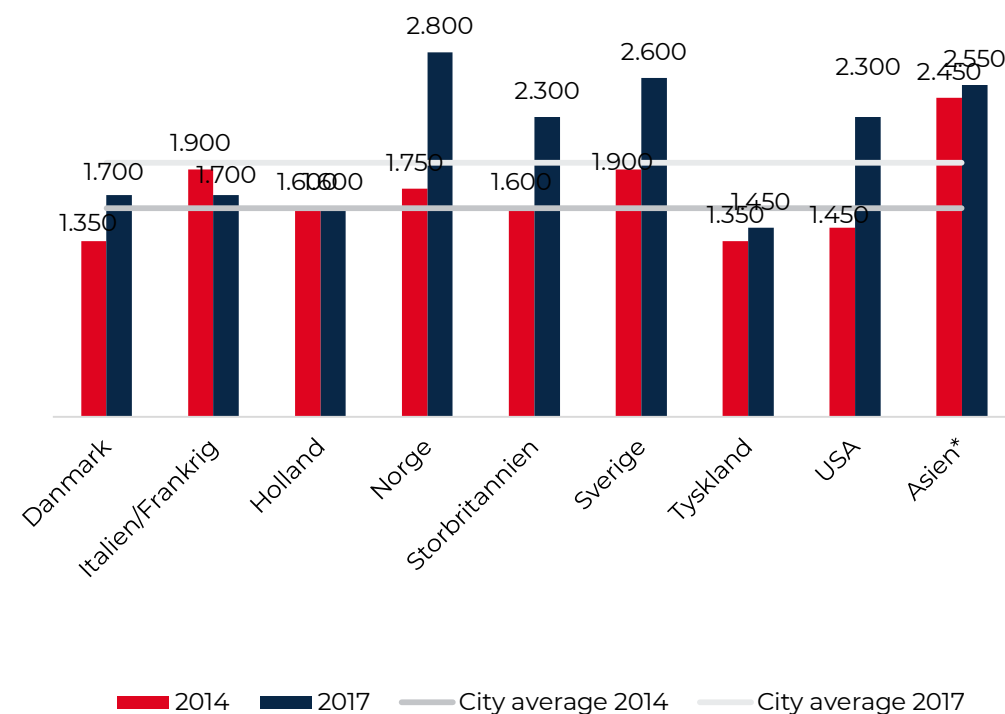
The American city tourist have high daily expenses

In general, foreign city tourists spend 2,150 DKK daily, when on holiday in Denmark.

Tourists from the US, Asia, Norway, the UK and Sweden have higher daily expenses than the average.

In 2017, American tourists had the fifth highest tourism turnover among foreign markets (see slide 29).

City tourists and their daily expenses by nationality



The Digital Tourist

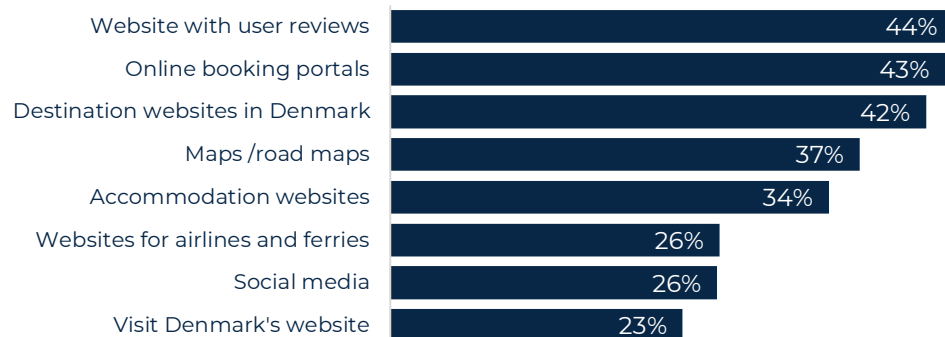


Inspiration Sought by the Americans Prior to their Holiday

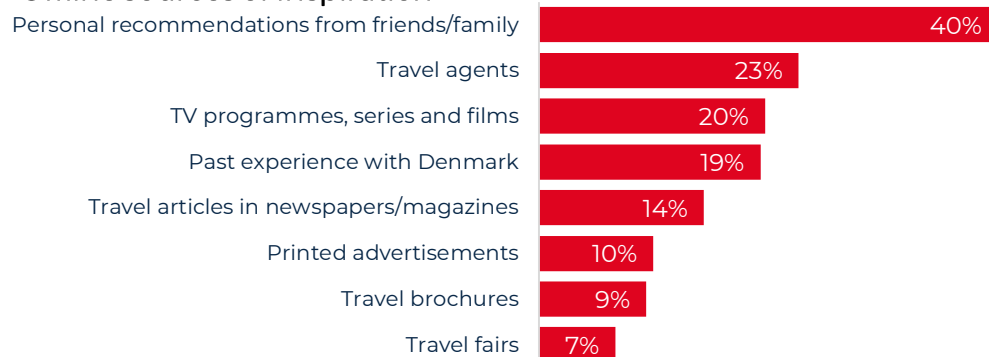
Have the following sources of inspiration influenced your decision to vacation in Denmark? Top 10

Multiple possible answers

Online sources of inspiration



Offline sources of inspiration



The American city tourist often turns to online sources, when looking for information about Denmark prior to their holiday

The tourist's top 3 sources are a mix of online sources; websites with user reviews, online booking portals and Danish destination websites.

Americans who come on city breaks to Denmark also take inspiration from travel agencies.

To a greater extent than in 2014, American city tourists now use websites with user reviews, blogs, social media and online videos as inspiration for their holiday.

Publicity and Visibility in the Media



Publicity in the American Media

Trends in the Media Landscape

Kathrine Simonsen, PR & Press Manager US

” *The US has the world's biggest media market, affecting not only millions of readers but also having a knock-on effect on multipliers around the world.*

Our focus on the US market is to make Denmark greater. We do this by trying to increase the knowledge about Denmark and literally by talking about "new" destinations, highlighting stories that support the general narrative about Denmark with a focus on gastronomy, culture and "hygge". We have increasing requests for and a growing interest in press trips to Denmark from high quality media.

When journalists visit Denmark, they particularly notice the quality of the food, new hotels, the beautiful and accommodating Danes, the quality of the design, and what we like to call "livability".

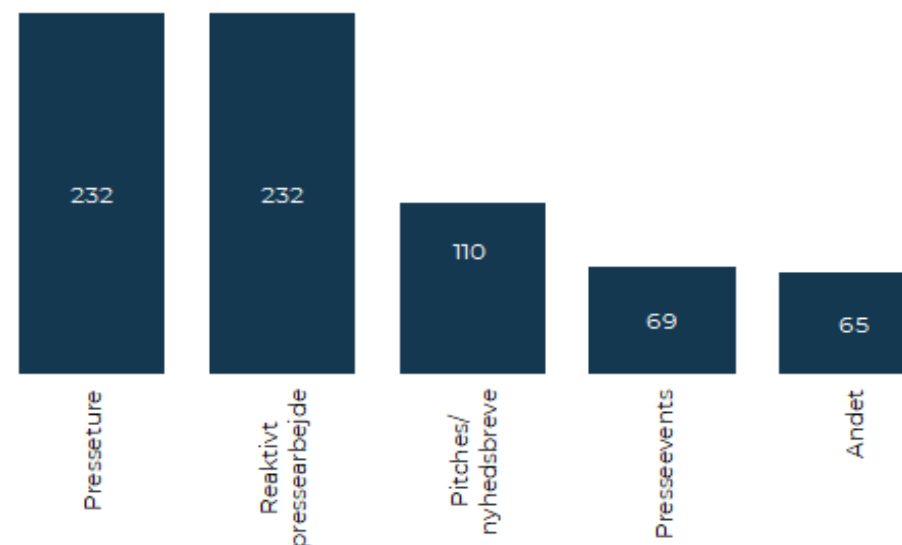
Denmark is perceived as a cool and innovative country. Our target group are the well-travelled Americans, the ones who have travelled overseas more than once. This is why we work with media that target well-off, well-travelled Americans of all ages. Furthermore, we see vast potential in millennials, because they share the values that distinguish our small country.

”

Press trips led to 232 media mentions in 2018

Press trips and reactive press relations account for most of the overall publicity for the year. However, press trips provide more in-depth and positive publicity than reactive relations. Moreover, we have created events in order to influence some of those media that are not allowed to accept press trips.

Number of articles by press activity, 2018



Denmark gets Publicity- even in High Places

Denmark fills the papers

Danish destinations and experiences were mentioned 708 times in different American media in 2018. By August 2019, we have reached 348 mentions so far. Online, we had 588 articles in 2018, whereas we were mentioned 91 times on print. The numbers by August of 2019 can be broken down to 326 online articles and 78 printed ones. The digital newsrooms have optimised their SEO, which means longer life expectancy for their articles, attracting attention and creating preference, years after appearing on the front page.

Denmark in all the right places

Denmark's coverage should not be seen in quantitative terms only, but also in qualitative ones. Big and important media choose to give us space.

The largest and most read travel magazine, Condé Nast Traveler, featured 80 articles about Denmark in 2018. The New York Times thought Denmark was interesting enough to feature 17 articles in 2018, including the series 36 Hours, which guested Copenhagen. Furthermore, Aalborg and the island of Fanø ranked on their prestigious 52 Best Places to go list in 2019. CNN also looked towards Denmark. This world-wide media placed Henne Beach on their list of recommended destinations, just like Aarhus was mentioned fondly several times as having emerged from the shadow of Copenhagen.

More front covers

Travel + Leisure featured Christianshavn on the cover, and the travel magazine also featured 13 articles about Denmark in 2018. Moreover, Airbnbmag had Copenhagen on the cover for their autumn edition of 2018, besides 20 pages on our capital city. Finally, the magazine Departures featured Scandinavia in their October edition, which meant a total of 42 pages of publicity for Denmark.



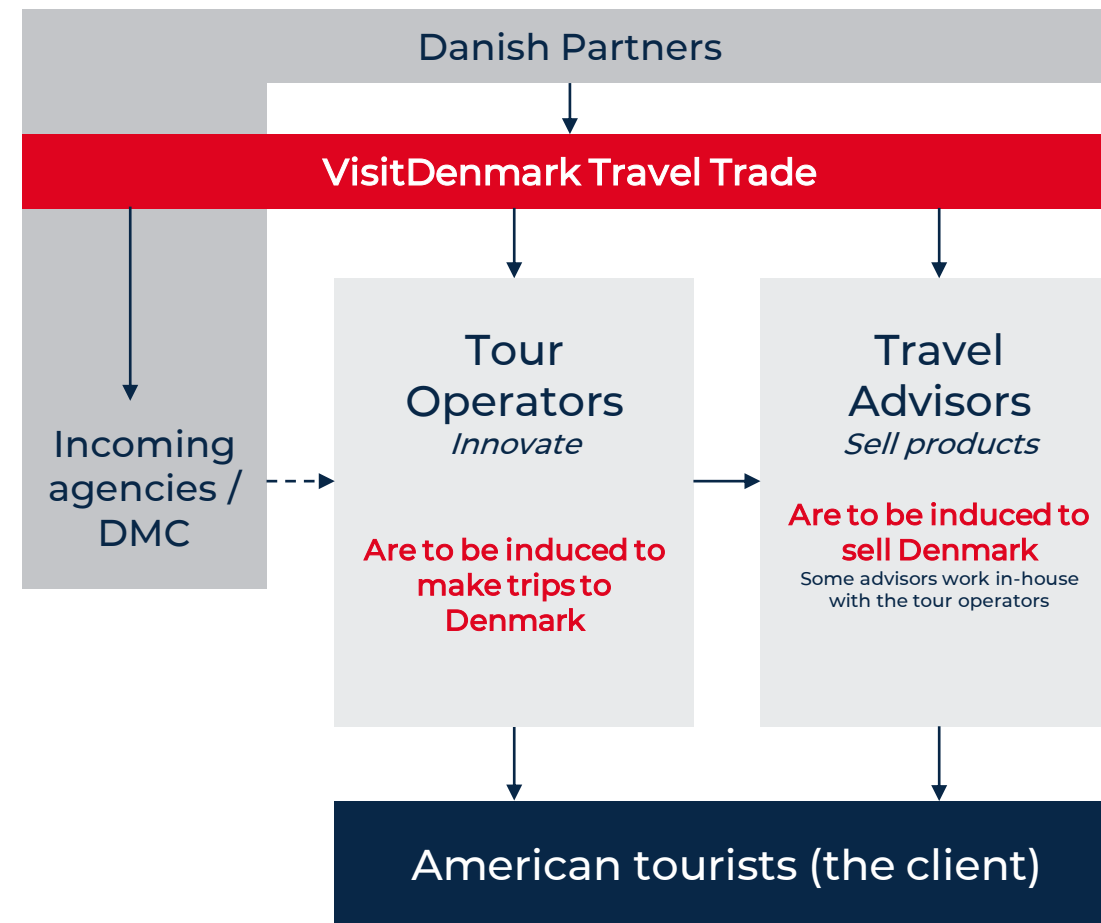
The New York Times

Travel Trade

An aerial photograph of a resort complex situated on a lush, green hillside overlooking a large body of water. In the foreground, a circular wooden pier extends into the water, creating a small, protected cove. The resort buildings, including a prominent white building with a red roof and a long, multi-story structure, are nestled among the trees. The sky is clear and blue, and the overall scene is bright and scenic.

Travel Trade – The Value Chain

- Travel Trade is the designation for the work VisitDenmark does with tour operators and travel advisors in the US and tourism partners.
- The US value chain is very complex with many layers, in which VisitDenmark operates (see next page).
- There are over 23,000 tour operators* and approximately 90,000 travel advisors** in the US.
- Personal contact still carries value in the travel trade industry in the US, which is why VisitDenmark US has been collecting many contacts over the years in the form of travel advisors and tour operators. Moreover, these travel advisors and tour operators have established personal relationships with their clients, many of which go back several generations.
- The use of tour operators and travel advisors is still a large part of the travelling industry in the US, mainly because lots of Americans wish to visit more countries on a single trip. The operators and travel advisors at the same time open up for additional experiences and benefits on the destination. The operators are yet another way of placing Denmark on the market to American tourists.



The chart shows the basic travel trade value chain. It should be noted that not all operators use a DMC. It depends on the company. More detail on the following slide..

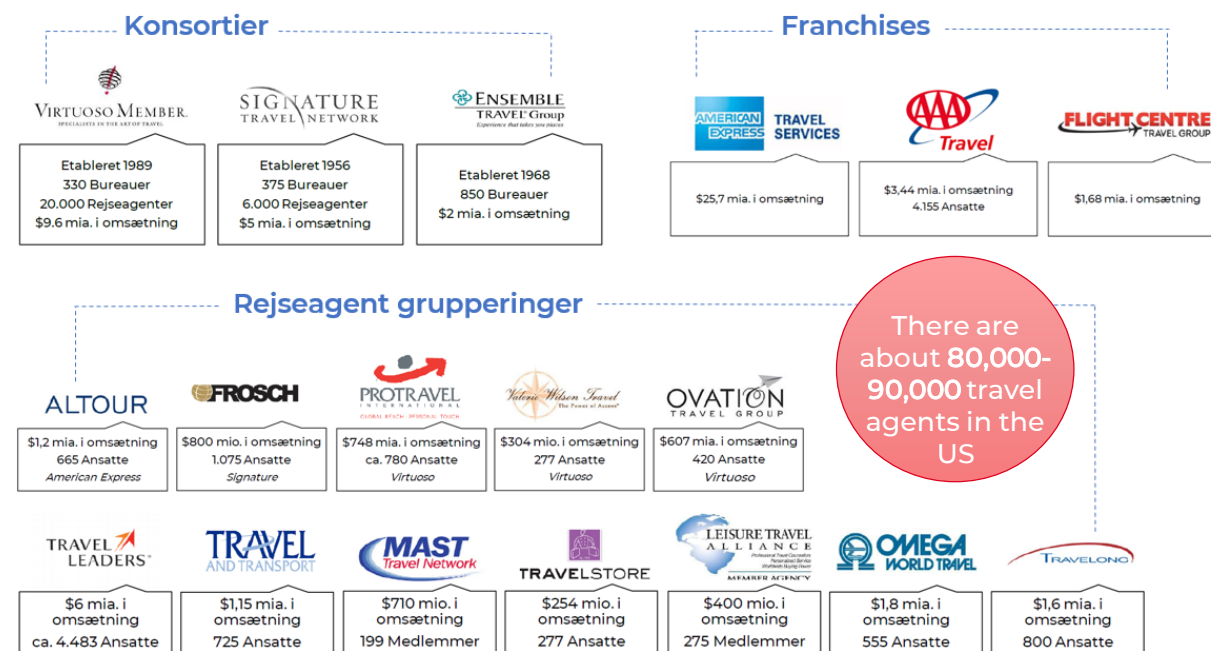
*CornerSun Destination Marketing (2018)

** Information from TrekkSoft (2019)

Travel Trade – Travel Advisors

- In the US, there are three large consortia, of which advisors can qualify to join: Virtuoso, Signature and Ensemble.
- VisitDenmark is a partner at Signature.
- Under each of these big consortia, there are sub-groups who also include travel advisors.
- Tour operators are also organised in groups and VisitDenmark collaborates with USTOA (United States Tour Operator Association, with 54 tour operators, representing 163 brands in its network.

Overview of travel agents in the US



Travel Trade – Why?

MMGY, 2015

Millennials plan more trips than other generations. As a generation, millennials put more effort into planning than other generations. The overwhelming amount of resources available has been a catalyst for a specific trend; an increase in the use of travel advisors.

SKIFT & Signature Travel Network, 2017**

Millennials prefer a travel advisor when planning a unique, unforgettable experience.

Trekkssoft, 2019*

According to Trekkssoft (Travel Trends Report, 2019), bookings made without human interaction accounted for more than 82% of their total bookings in 2018. However, they only amounted to slightly over 50% of their annual income. Bookings made with human interactions only accounted for 17.8% of all their bookings, while amounting to almost 49% of their total annual income.

USTOA & MMGY, 2018 (International traveler research study, 2018)

40% of the respondents had used a travel advisor for planning and booking their international holiday in the past 12 months.

86% are likely to use a travel advisor for booking of international holiday packages and tours within the next two years.

82% are likely to use an advisor for booking accommodation, 73% for flight booking, 65% for choosing a destination.

29% will use an advisor for planning and booking a group tour, 24% for multiple destination holidays, and 18% because of language barriers.***.

* Information from TrekksSoft (2019)

** Information from TrekksSoft (2019) + Signature Travel Network (2017)

*** This information is just an examples of reasons to use a travel advisor, which is why the overall percentage is not 100%.

Examples of Holidays to Denmark

Links to tours to Denmark with prices and travel listings:

- Cox & Kings:
<https://www.coxandkingsusa.com/travel-destinations/europe/denmark/>
- Trafalgar:
<https://www.trafalgar.com/en-ca/destinations/europe/denmark>
- Insight Vacations:
<https://www.insightvacations.com/us/destinations/europe/denmark>
- Tauck Tours:
<https://www.tauck.com/tours/scandinavia-escorted-tour?tcd=sc2020>
- Butterfield & Robinson:
<https://www.butterfield.com/trip/denmark-biking/>
- Biketours.com:
https://www.biketours.com/search/results/?search=true&sort=&tags=&search_q=denmark&page_s=&type=3
- RoadScholar:
<https://www.road scholar.org/find-an-adventure?query=denmark>

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Overview Itinerary Highlights Optional experiences Accommodation Reviews Dates & prices

Vacation type: Regional Journey
 Brochure: 2019 Europe & Britain

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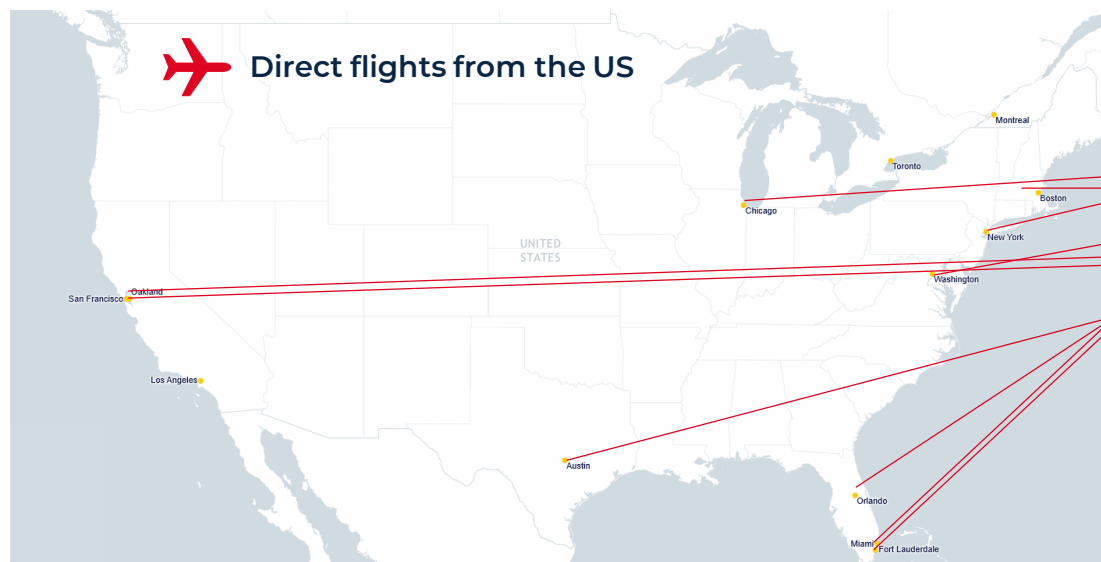


Flight Traffic from the US to Denmark

Flight Routes between the US and Denmark

There are many routes to Denmark from the US, some of which direct flights. Moreover, the American traveller does not mind a lay-over, which only increases the possibilities.

Codesharing – a cross-airline cooperation – has simplified lay-overs, making them a smoother experience. One example is Star Alliances; SAS and United Airlines being two out of 27 members. This cooperation means that an American traveller can easily book a ticket through United Airlines from the nearest airport along with a SAS flight, without having to book through two airlines.



Departure	Airline	Arrival
New York City (JFK)	Norwegian Air Shuttle	Copenhagen
New York City (JFK)	SAS	Copenhagen
New York City (JFK)	Delta Air Lines (inkl. Air France og KLM)	Copenhagen
Boston (BOS)	SAS	Copenhagen
Chicago (ORD)	SAS	Copenhagen
Austin (AUS)	SAS	Copenhagen
Washington D.C. (IAD)	SAS	Copenhagen
Miami (MIA)	SAS	Copenhagen
Fort Lauderdale (FLL)	Norwegian Air Shuttle	Copenhagen
Orlando (MCO)	Norwegian Air Shuttle	Copenhagen
Los Angeles (LAX)	Norwegian Air Shuttle	Copenhagen
San Francisco (SFO)	SAS	Copenhagen
Oakland (OAK)	Norwegian Air Shuttle	Copenhagen



Accommodation, Turnover and Seasonality

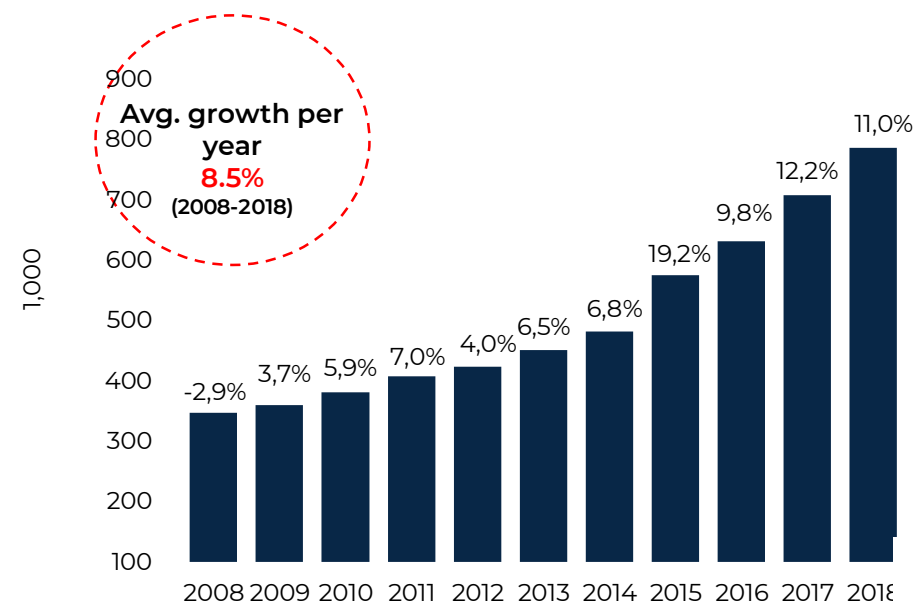
Growth in American Overnight Stays

Positive growth in the number of American overnight stays in Denmark

In 2018, the Americans spent almost 800,000 nights in Denmark.

Compared to 2017, the number of American overnight stays has increased by 11.0% in 2018.

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



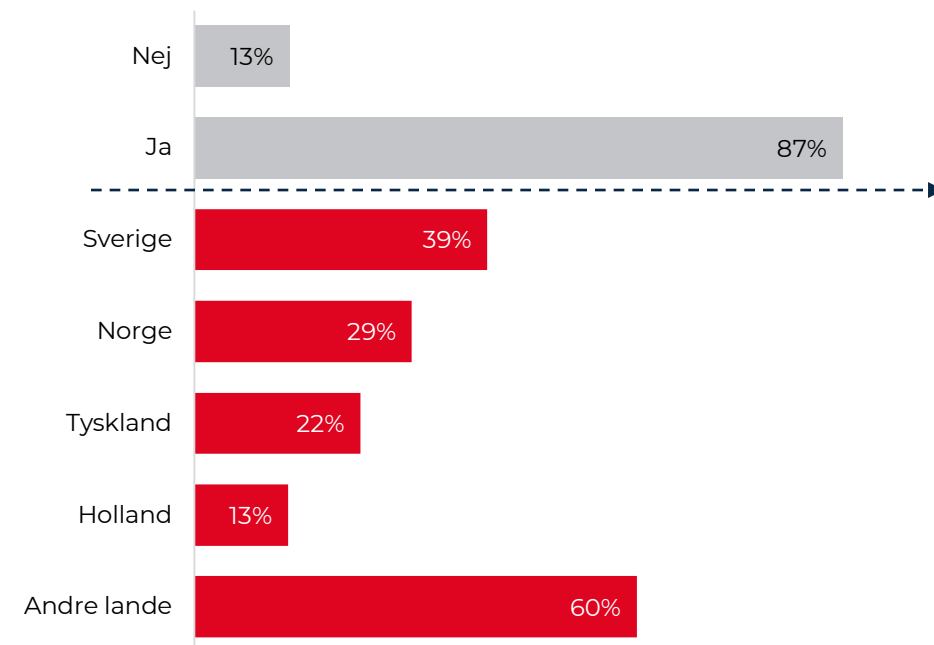
Overnight Stays in Other Countries

Americans on city breaks visit other countries as well as Denmark

When travelling to Denmark, the Americans also visit other countries. Four out of 10 also stay overnight in Sweden and three out of 10 in Norway as well.

Six out of 10 stay overnight in 'other countries' then Sweden, Norway, Germany and the Netherlands.

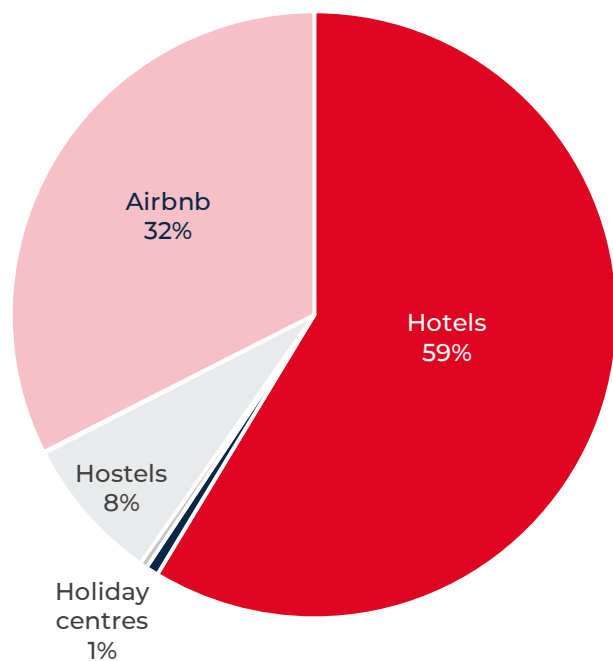
Are you staying or have you stayed overnight in other countries during this holiday?



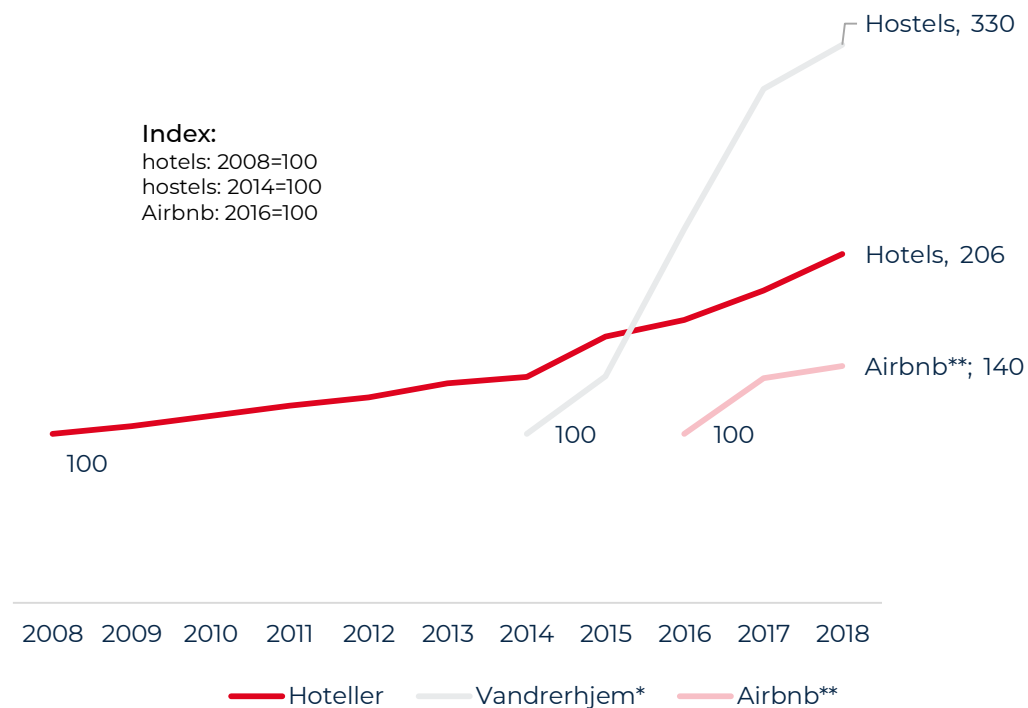
American Overnight Stays by Accommodation Types

- commercial and Airbnb

American Overnight Stays in Denmark, 2018
(incl. Airbnb)



Growth in American Overnight Stays in Denmark



s. 26 Kilde: Airbnb og Danmarks Statistik.* Grundet ny population fra 2014 forekommer databrud. Der kan ikke sammenlignes med tal fra før 2014. Indeks er her 2014=100. ** Der er ikke tal for Airbnb før 2016. Indeks er her 2016=100.

American Overnight Stays Throughout the Year

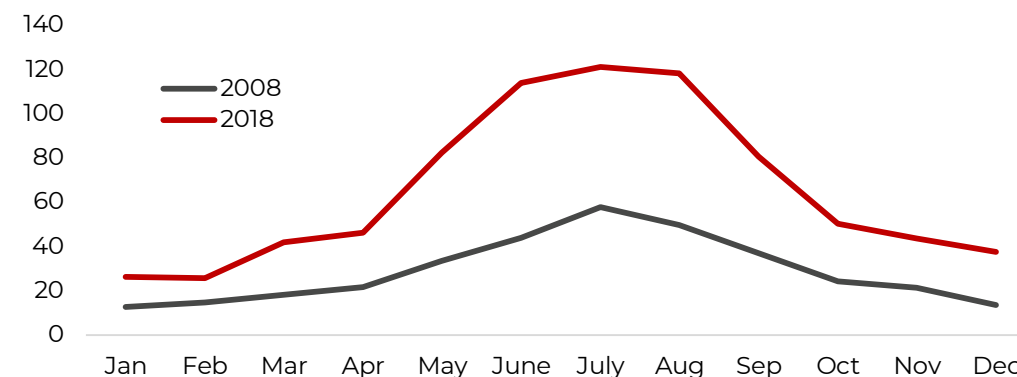
More American overnight stays in peak as well as in off-peak seasons

From 2008 to 2018, the number of American overnight stays in Denmark has increased by 127 pct. The increase is to be found during all seasons: high, shoulder and winter.

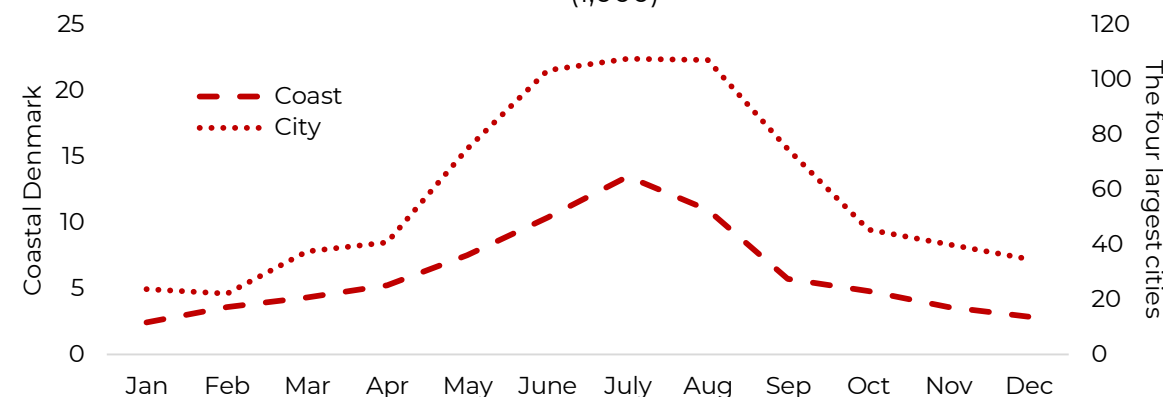
	2008	2018	2008	2018
	Number (1,000)		Index (2008=100)	
High	107	239	100	223
Shoulder	178	415	100	233
Winter	62	133	100	215
Total	347	787	100	227

The pattern among Americans on city breaks in Denmark is similar to the pattern in overnight stays among American coastal and nature tourists. This means that the pattern in overnight stays for both groups are seasonal, with more overnight stays during the summer months.

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



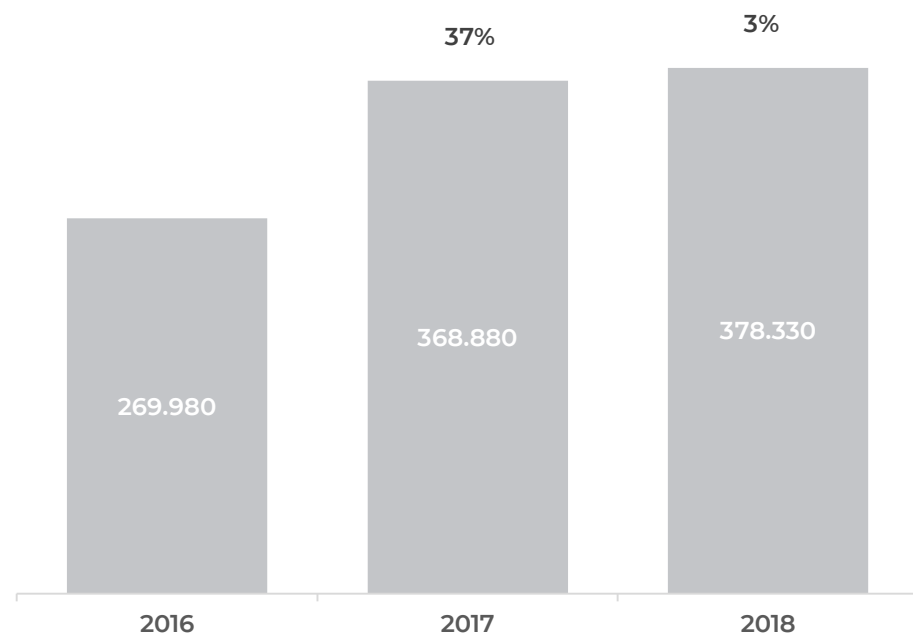
2018: American coastal and city overnight stays (1,000)



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

American Overnight Stays on Sharing Economy Platforms

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



Many Americans use Airbnb – in and outside of Copenhagen

The number of American overnight stays with Airbnb has increased by 3 pct. from 2017 to 2018, after a significant increase of 37 pct. from 2016 to 2017.

Looking into the distribution of the number of overnight stays between cities and coastal areas, eight out of 10 American overnight stays take place in one of the four largest Danish cities.

Americans account for most of the Airbnb overnight stays in Copenhagen and take second place in foreign overnight stays in Denmark after Germany.

American 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	73,423	304,907	286,374	11,550	2,566	4,417
Pct.	19 pct.	81 pct.	93 pct.	4 pct.	1 pct.	1 pct.

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%

US	Turnover 2017 (m DKK)	Percentage
Visits w. paid accommodation		
Hotel – holiday	1,029	36%
Hotel – business	938	33%
Holiday centre	18	1%
Camping	3	0%
Hostel	72	3%
Rented holiday home	0	0%
Yacht	1	0%
Sharing Economy platforms	755	22%
Other*	57	3%
Total	2,873	57%
Visits with free accommodation		
Total	2,466	43%

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.



Knowledge Bank on Tourism in Denmark

www.visitdenmark.dk/corporate/videncenter

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