

# FRANCE

## Market Profile 2020

09/09/2020

# Introduction

In VisitDenmark's market profiles we present key insight into the most important markets in Danish tourism. The objective is to give tourism stakeholders and third parties a perspective on the importance for Danish tourism in a number of markets.

Following a summary of focal key data and a brief introduction to Denmark's target groups in the respective markets, our reports look at **overnight stays**, **tourism turnover** and **seasonality**, **inspiration search** and prior **knowledge** of Denmark as a holiday destination. Subsequently, we deal with **holiday-related online search**, **air traffic** (flights + passengers) as well as **reasons for travelling**. In conclusion, we present our **market expectations** as they were **prior to the outbreak of the COVID-19 pandemic**.

See all our market profiles here:

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

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# VisitDenmark's Market Office in Milan

The French and Italian markets



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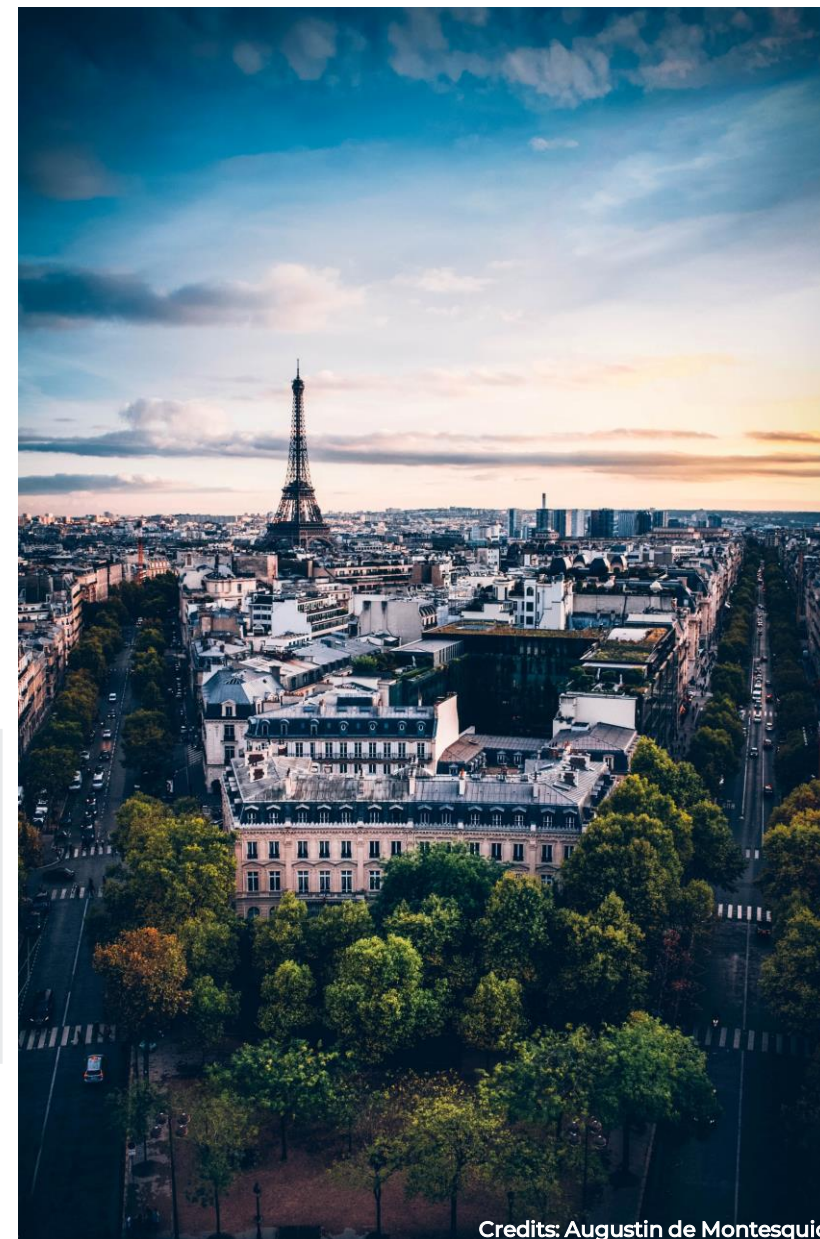
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Credits: Augustin de Montesquieu

An aerial photograph of a coastal town at sunset. The town is situated on a narrow strip of land between a large body of water on the left and a larger body of water on the right. The sky is a mix of orange, pink, and blue. The water is a deep blue. The land is a mix of green, brown, and grey. The text "Key Data and Target Groups" is overlaid in the center in a large, white, sans-serif font.

# Key Data and Target Groups

## Market Potential

2019 saw growth in the number of French overnight stays in Denmark for the fourth year in a row.

The Danish cities are particularly sought after by the French, but there is a pronounced relative growth rate in the number of overnight stays both in cities (+17,7%) and in coastal and rural Denmark (+10,0%).

3 out of 10 (28%) of the French in Paris know some or a lot about Denmark as a holiday destination. Just over half of the French view Denmark as an attractive holiday destination.

When the French think about Denmark, they associate it with words like nature and beautiful scenery, beaches and tranquillity. These associations are consistent with their reasons for travelling on holiday. In this way, there seems to be potential for an ever larger number of French overnight stays in Denmark – and not only in the cities, but also in coastal and rural areas.



# Selected Conclusions

## **The French in Paris think Denmark is an attractive holiday destination**

More than half of the French view Denmark as an attractive holiday destination.

## **Denmark, Norway and Sweden are equally famous as holiday destinations**

28% of the French in Paris know some or a lot about Denmark as a holiday destination. This level of knowledge is the same as those of Norway and Sweden, but lower than those of the UK (67%), Germany (56%) and the Netherlands (50%).

## **Growth in number of overnight stays**

The number of French overnight stays in Denmark increased by 16.2% from 2018 to 2019. In absolute terms, this means a growth of 50,000 overnight stays.

The French primarily make use of the Danish hotels as their means of accommodation, counting a significantly higher number of overnight stays in 2019 (+19.9%) as opposed to 2018. In terms of numbers of overnight stays, hotels saw the highest growth, while holiday centres had a negative growth of 14.9%.

## **The French search for information about Copenhagen in particular**

When the French search for information about holidaying in Denmark, they usually use search terms related to Copenhagen. Search terms like *Copenhagen*, *Aarhus*, *Aalborg* and *Odense* all had more hits in 2019 than in 2018. The search term *Copenhagen* was higher than *Danemark* in terms of numbers in 2019.

## **The majority of Danish destinations benefitted from the rising number of French overnight stays**

Most of the 18 DMOs in Denmark saw more French overnight stays in 2019 than in 2018. The strongest absolute growth took place in Wonderful Copenhagen and the highest relative growth took place in Destination Sjælland.

## **Growth in number of French tourist booking through Airbnb**

The number of Frenchmen booking overnight stays through Airbnb increased by 10.5% in 2019 compared to 2018.

This is the third year in a row that the number of French tourists booking through Airbnb shows positive growth.

# Perspectives on the French Travel Market

by Ghita Scharling Sørensen, Market Director:

"In France, our work with B2C, travel trade, the news media and influencers is carried out in close collaboration with Danish and local tourism and non-tourism partners, as well as with our Nordic counterparts.

In recent years, we have been focused on promoting authentic experiences all over Denmark out of season; our mantra being "off-track, off-season and off-road" and, as this profile shows, our efforts have paid off. From our office in Milan, we cover both the French and the Italian markets, building on possible synergies, whenever we can.

Our Image and Potential Analysis conducted during spring 2020 shows a close correlation between knowledge of Denmark as a holiday destination and Denmark's attractiveness rating. There is a higher level of knowledge among those who give Denmark a high score on a scale of attractive holiday destinations, which points to the need for continuous promotion of Denmark as a holiday destination in order to tap into market potential.

During lockdown, we have dedicated our time and efforts to starting new projects and collaborations as well as to strengthening our local network of tour operators, journalists, influencers, and other stakeholders."



Photo: Tine Uffelmann

# Key Data: Accommodation, Expenses and Turnover

358,200

overnight stays in 2019

50,000

additional overnight stays compared to 2018

16.2%

increase in number of overnight stays compared to 2018

+10.5%

growth in number of tourists booking overnight stays in Denmark via Airbnb

1.6 bn DKK

in Tourism Turnover in 2018

28%

of the French living in Paris are acquainted or well acquainted with Denmark as a holiday destination



## Coastal and Nature Tourism

66,100

overnight stays\*

10.0%

growth in number of overnight stays compared to 2018



## City Tourism

292,100

overnight stays\*

17.7%

growth in number of overnight stays compared to 2018

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



-  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



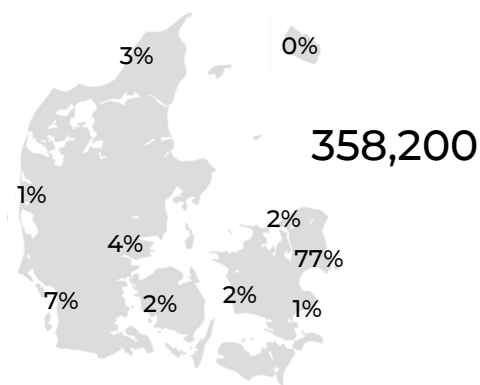
## Household income



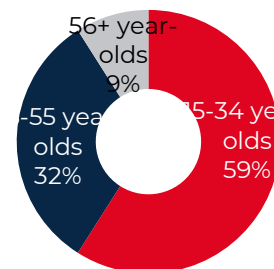
## Education



## French overnight stays by regions \*



## French city tourists in Denmark



## Functional necessities



- Weekend/prolonged weekend
- Direct flight
- Simple holiday planning
- Visited other cities, wanting to try something new

## Emotional necessities



- Quality time with loved ones
- Recreation as well as experience
- Social recognition for choosing a new 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: 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: 1/10 will return



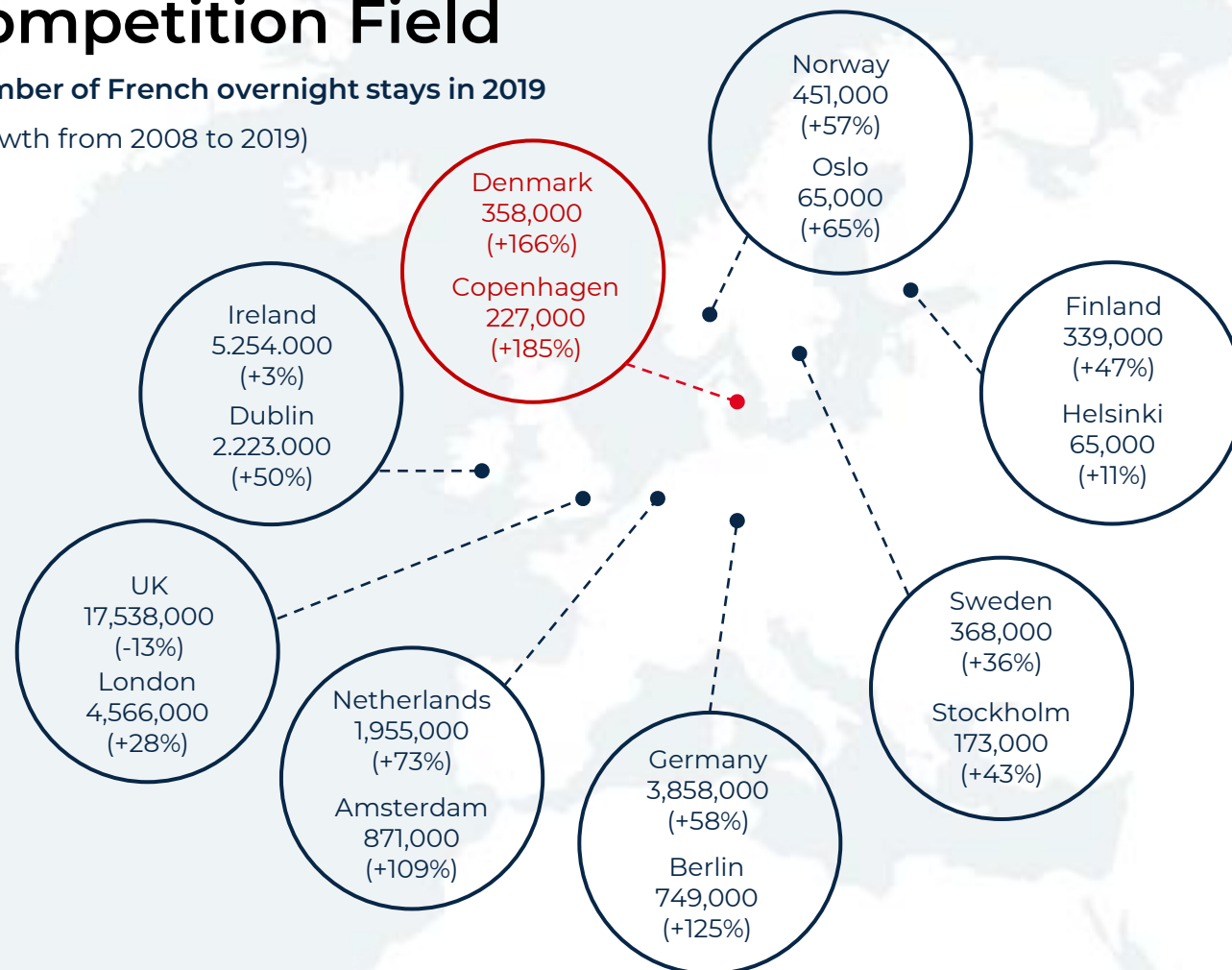
# Accommodation, Turnover and Seasonality

Photo: Kim Wyon

# French Overnight Stays in the Northern European Competition Field

## Number of French overnight stays in 2019

(growth from 2008 to 2019)



### Denmark gains market shares

In terms of relative growth in the number of French overnight stays from 2008-2019, Denmark has taken the lead.

Denmark has a nordic market share of French overnight stays of 23%. The number of French overnight stays in Denmark has increased significantly over the last decade, compared to the other Nordic countries.

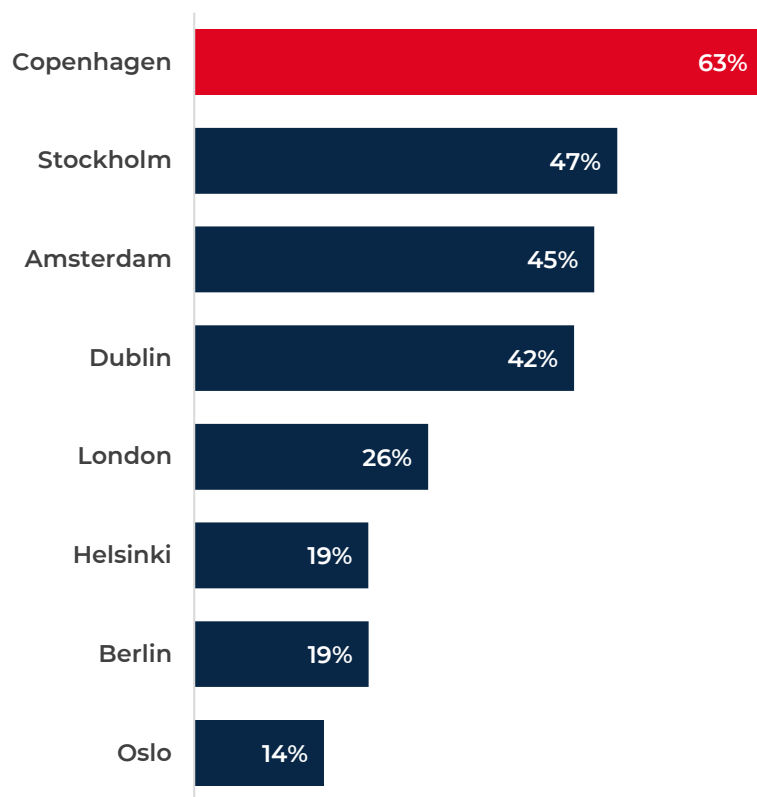
Copenhagen accounted for 42% of all French overnight stays in the Nordic cities in 2019, with a total of 227,000 overnight stays.

If you look at the entire European competition field, then Germany, Netherlands, UK and Ireland have significantly more French overnight stays, but none of these countries have 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 2019

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



## Copenhagen accounts for 63% of all French overnight stays in Denmark

Within the capitals of the northern European competition field, there are considerable variations in the percentages of French overnight stays

With 63%, Copenhagen lies at the very top. In comparison, Stockholm takes 47% of all the French overnight stays in Sweden.

These figures present a significant potential for Denmark, when it comes to French overnight stays outside of Copenhagen.

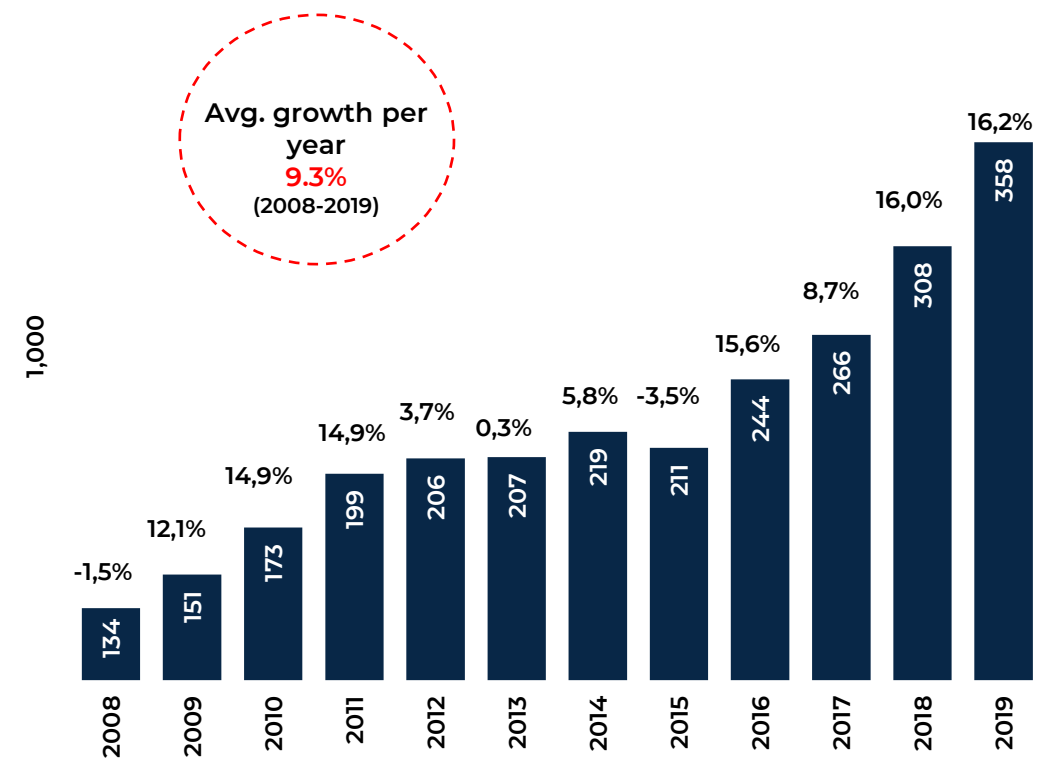
# Growth in the Number of French Overnights Stays

## Continuing growth in the number of French overnight stays in Denmark

In 2019, the French spent 358,200 nights in Denmark.

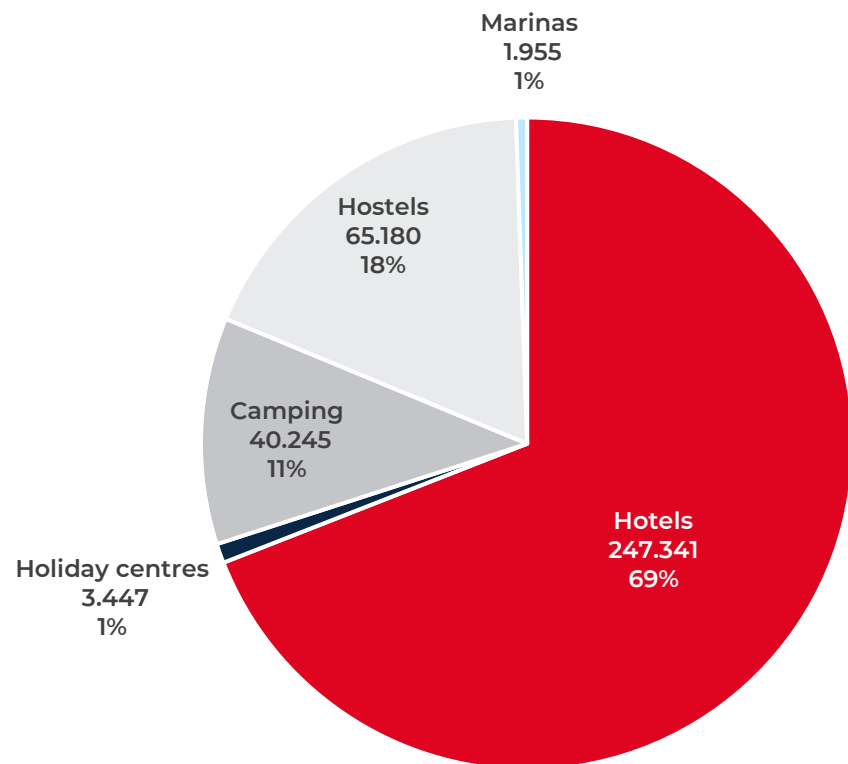
Compared to 2018, the number of French overnight stays in Denmark increased by 16.2% in 2019.

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

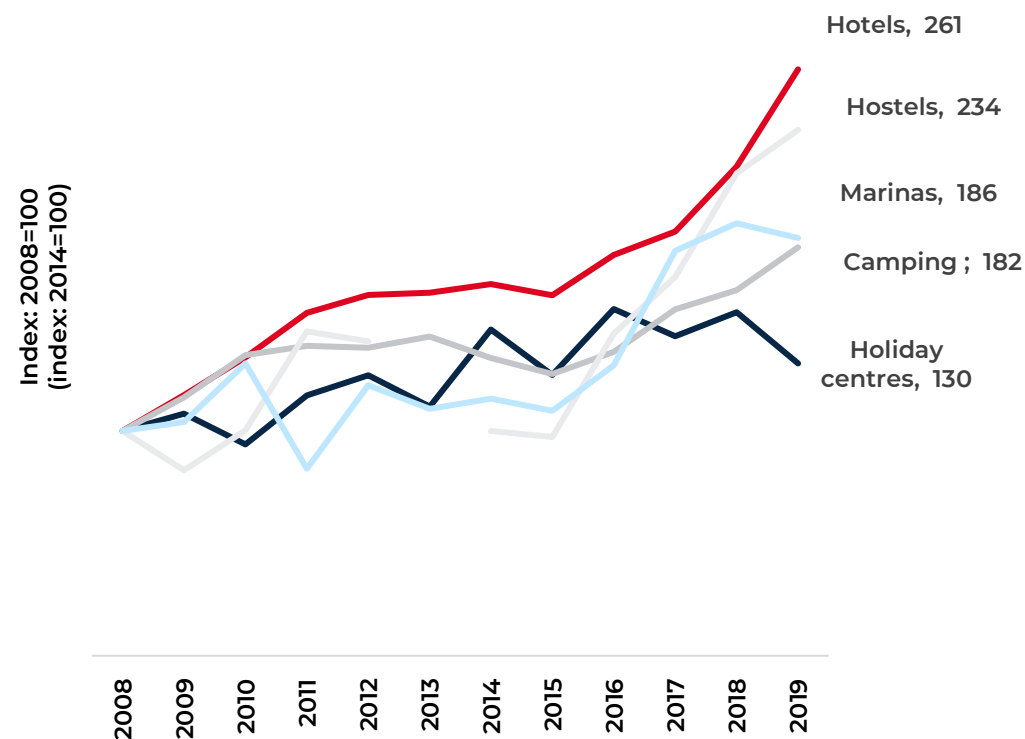


# French Overnight Stays by Accommodation Types

French overnight stays in Denmark in 2019



Growth in French overnight stays in Denmark

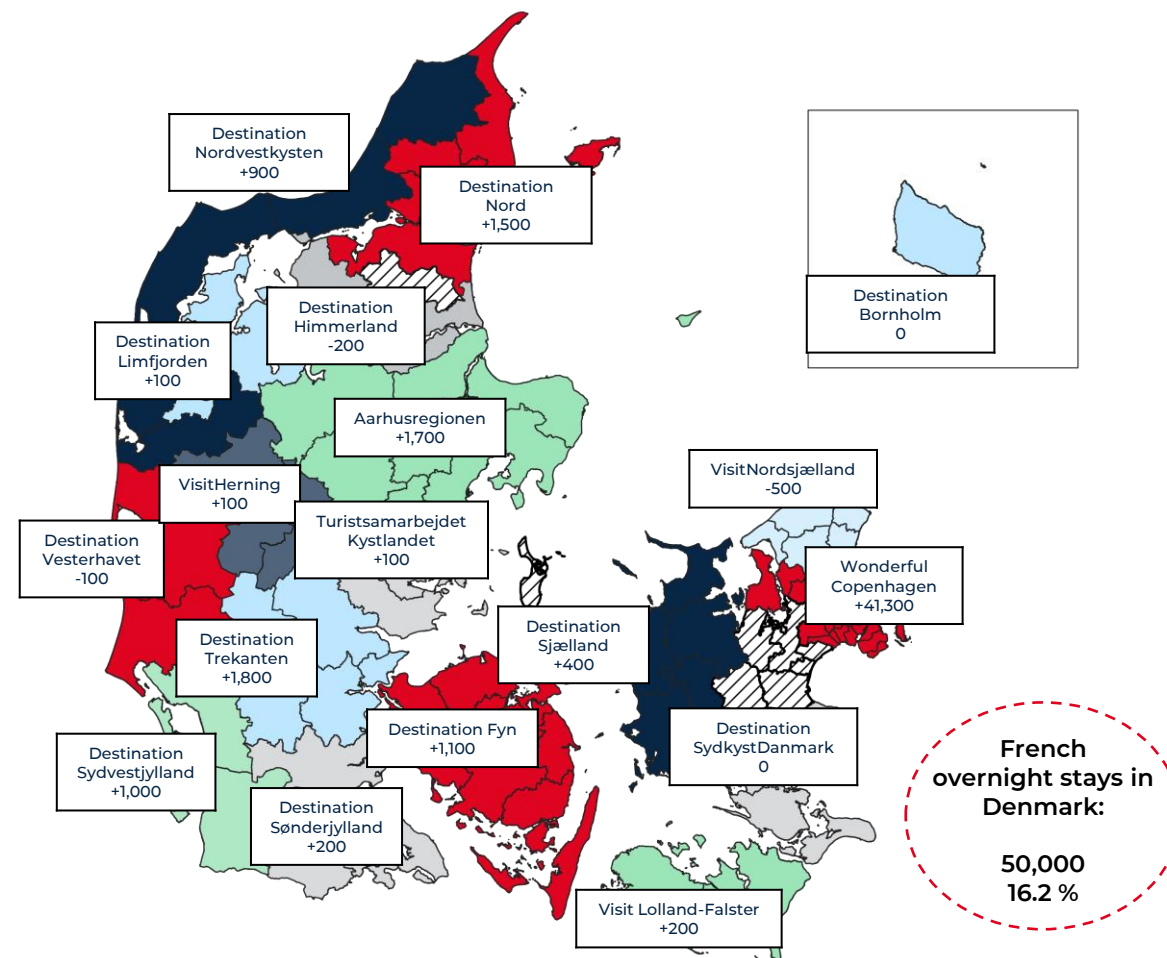


# Overnight Stays by Destination Marketing Organisations

## French overnight stays by DMOs

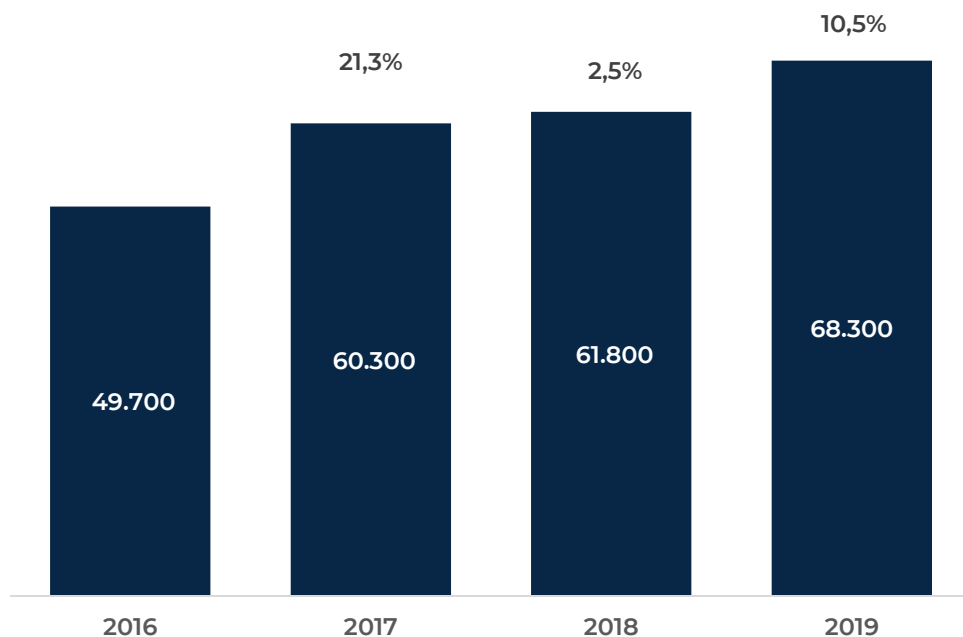
	Number of overnight stays 2019	Growth compared to 2018
Wonderful Copenhagen	277,841	17.4%
Destination Trekanten	15,965	12.4%
Aarhusregionen	12,825	14.9%
Destination Fyn	8,233	16.1%
Destination Nord	6,764	28.7%
Destination Sydvestjylland	6,395	19.2%
Destination NordVestkysten	4,892	23.4%
VisitNordsjælland	3,233	-13.2%
Destination Sønderjylland	2,703	6.9%
Destination Sydvestjylland	2,455	-0.7%
Turistsamarbejdet Kystlandet	2,042	3.9%
Destination Vesterhavet	1,831	-7.0%
VisitHerning	1,820	3.6%
Destination Sjælland	1,633	32.8%
VisitLolland-Falster	1,533	11.2%
Destination Bornholm	1,048	3.7%
Destination Limfjorden	766	15.7%
Destination Himmerland	230	-39.9%
Outside any destination	5,932	8.6%

## Growth in number of French overnight stays from 2018 to 2019



# French Tourists on Sharing Economy Platforms

Number of French tourists and growth compared to the year before with Airbnb



## More French tourists booking nights through Airbnb

Since 2016 there has been growth in the number of French tourists in Denmark booking nights through Airbnb.

In 2016, the number of tourists was 49,700 against 68,300 in 2019, representing a growth of 37%.

If you look closer at the distribution of French tourists in cities and coastal areas, almost three-quarters of French tourists stay the night in one of the four largest Danish cities, mostly in Copenhagen.

## French Airbnb guests in 2019 distributed between Coast and City as well as city tourists distributed among the four largest Danish cities

	Coast	City	Copenhagen	Aarhus	Aalborg	Odense
2019	18,741	49,577	44,964	2,281	831	1,501
Pct.	27%	73%	91%	5%	2%	3%



# Number of French Overnight Stays Home and Abroad

	French overnight stays 2019 (1,000)	Percentage of European overnight stays	Growth from 2018 to 2019
France	307,292		3%
Europe	97,500		1%
The rest of the world	149,572		11%
<b>Total</b>	<b>554,364</b>		<b>4%</b>
Spain	25,929	27%	0%
UK	17,538	18%	-7%
Italy	14,814	15%	4%
Greece	5,383	6%	6%
Ireland	5,255	5%	4%
Portugal	4,615	5%	0%
Germany	3,858	4%	5%
Belgium	2,817	3%	0%
Croatia	2,228	2%	7%
Netherlands	1,956	2%	8%
Austria	1,804	2%	0%
Malta	1,760	2%	6%
Switzerland	1,301	1%	1%
Turkey	1,139	1%	20%
Czech Republic	829	1%	16%
Poland	540	1%	2%
Armenia	488	1%	45%
Hungary	477	0%	6%
Norway	452	0%	9%

# Tourism Turnover 2018

Market	Tourism Turnover 2018 (m DKK)	Percentage of foreign tourism turnover 2018
Total	132,484	
Denmark	74,809	
Foreign counties	57,675	
Germany	15,901	28%
Norway	8,343	14%
Sweden	7,746	13%
USA	3,779	7%
UK	3,633	6%
Netherlands	1,770	3%
<b>France</b>	<b>1,592</b>	<b>3%</b>
Italy	1,263	2%
China	915	2%
Spain	860	1%
Switzerland	641	1%
Finland	562	1%
Belgium and Luxembourg	548	1%
Poland	490	1%
India	318	1%
Canada	310	1%
Japan	283	0.5%
Australia	274	0.5%
Russia	260	0.5%
Austria	230	0.4%
Ireland	162	0.3%
Brazil	125	0.2%
Portugal	120	0.2%
South Korea	119	0.2%
Greece	99	0.2%
Other countries	7,331	13%

France	Turnover 2018 (m DKK)	Percentage
<b>Visits with paid accommodation</b>		
Hotel – holiday	398	32%
Hotel – business	271	22%
Holiday centre	6	1%
Camping	76	6%
Hostel	66	5%
Rented holiday home	-	-
Yacht	2	0%
Sharing Economic platforms	405	33%
Others*	8	0%
<i>Total</i>	<i>1,229</i>	<i>77%</i>
<b>Visits with free accommodation</b>		
<i>Total</i>	<i>363</i>	<i>23%</i>

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

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# French Overnight Stays Throughout the Year

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

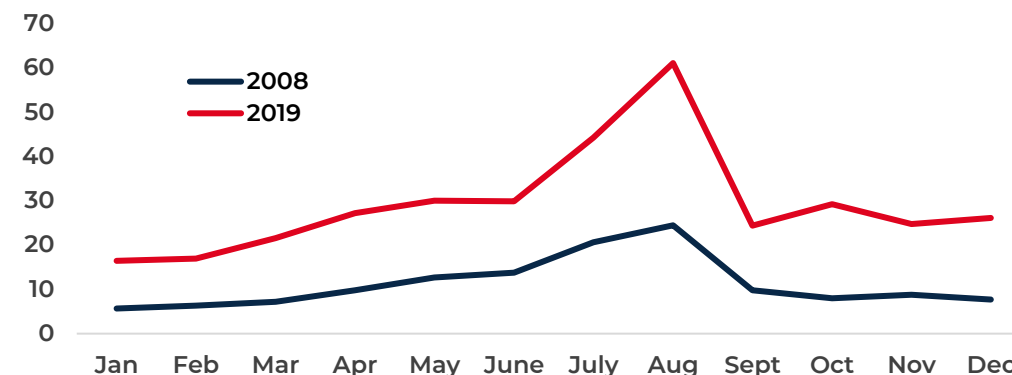
From 2008 to 2019, the number of French overnight stays in Denmark increased by 166%. This increase took place all year round: during the high season, the shoulder season and the winter season.

	2008	2019	2008	2019
	Number (1,000)		Index (2008=100)	
High	45	106	100	235
Shoulder	61	166	100	272
Winter	28	86	100	304
<b>Total</b>	<b>134</b>	<b>358</b>	<b>100</b>	<b>266</b>

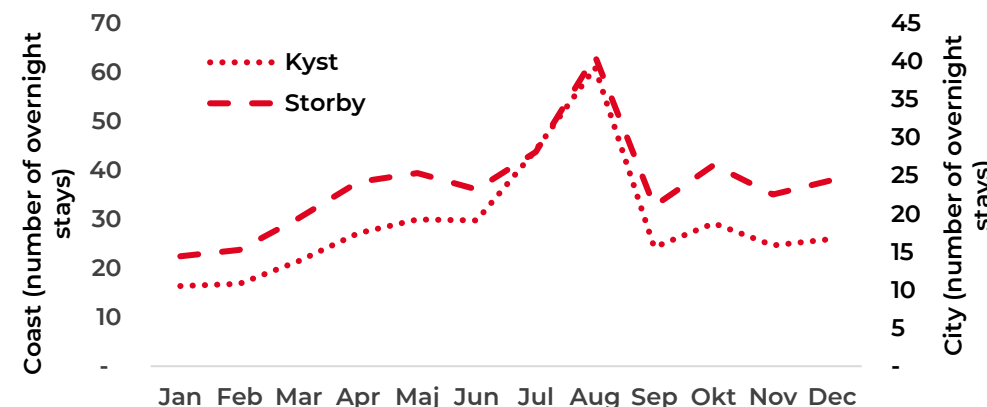
The accommodation pattern among the French on city breaks in Denmark differs a bit from the one among the French on coastal and nature tours.

This means the curve for city tourists' overnight stays appears slightly more flattened (spreading out more evenly throughout the year) than is the case with coastal and nature tourists.

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



2019: French coastal and city overnight stays (1,000)



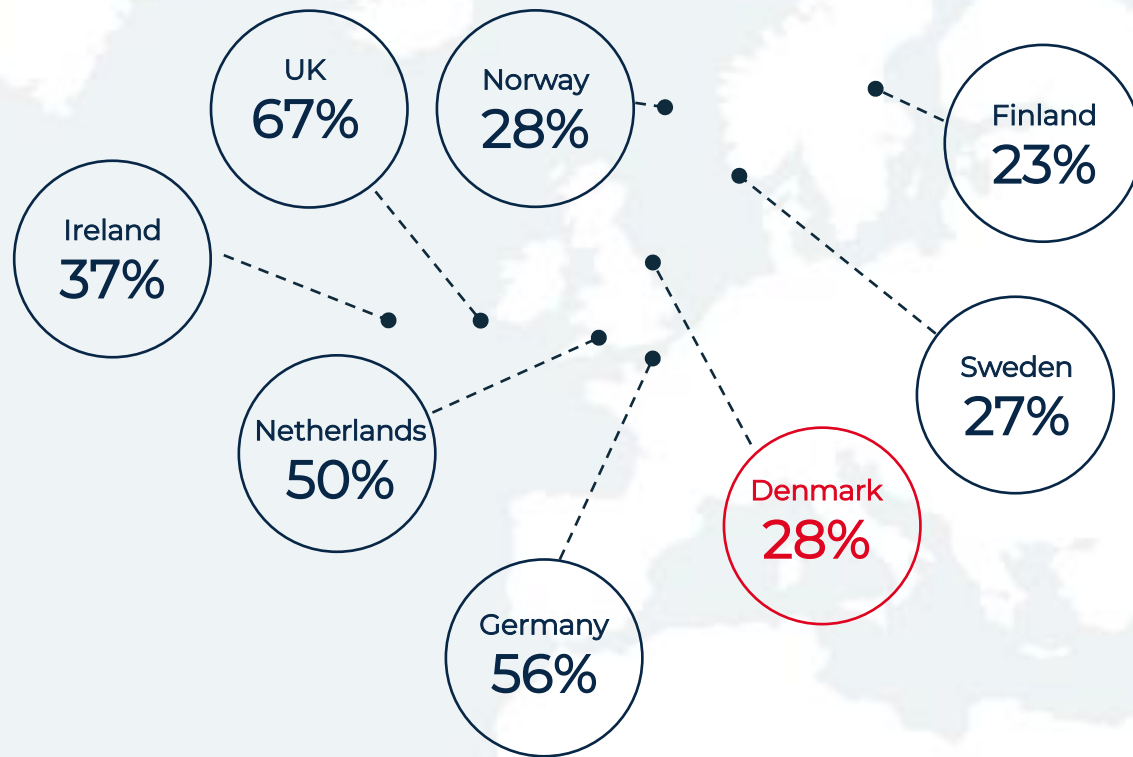
Note: High season: July-August, shoulder season: March-June and September-October, low season: Januar-February and November-December.



# Knowledge and Inspiration

# Knowledge of Holiday Destinations

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



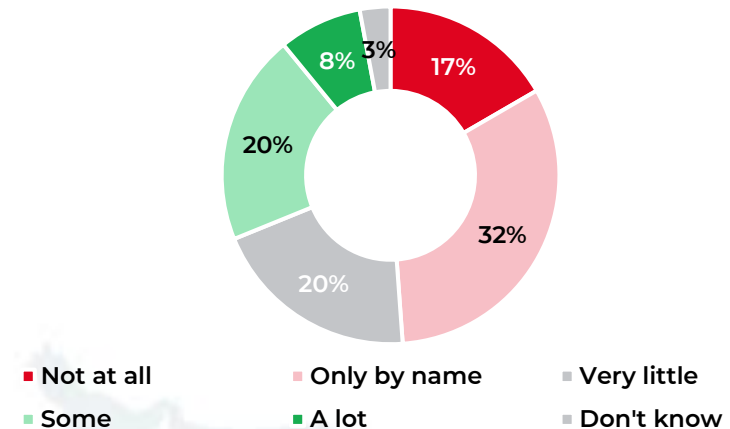
Three out of 10 of the French living in Paris know 'some' or 'a lot' about Denmark as a holiday destination

A total of 28% claim they know some or a lot about Denmark as a holiday destination.

The knowledge of Denmark is equal to that of Norway and Sweden, but superior to that of Finland.

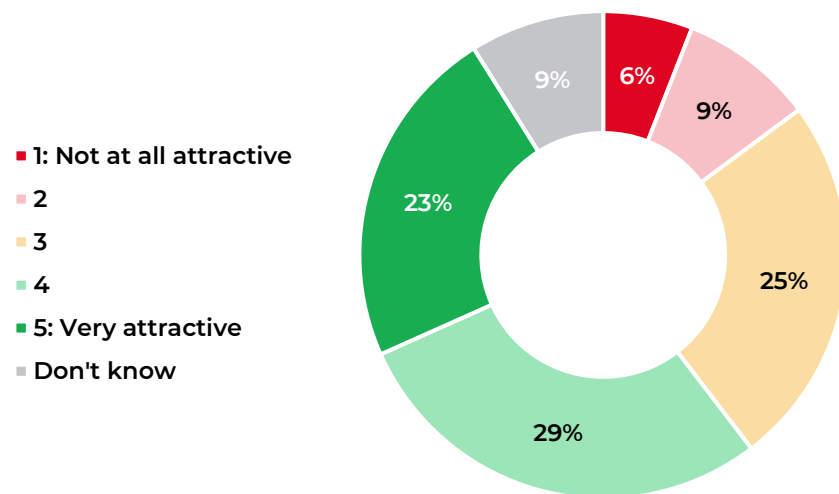
Germany, the Netherlands and the UK are noticeably more famous as holiday destinations than Denmark.

## Knowledge of Denmark as a holiday destination



# Denmark as an Attractive Holiday Destination

How would you judge Denmark as a holiday destination?



## The French have a very good impression of Denmark

Just over half (52%) of the French living in Paris view Denmark as an attractive holiday destination.

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

Happy guests and unique experiences are paramount to positive reviews of Denmark, during and after holidays. Personal recommendations are key with a lot of the French when choosing their holiday destination.

A photograph of a tent pitched on a beach at sunset or sunrise, with a starry night sky above. The tent is illuminated from within, casting a warm glow. The sky is a mix of orange, yellow, and purple, with many stars visible. The beach is dark and sandy, with some footprints visible. The overall mood is serene and peaceful.

# Holiday-Related Online Search

Photo: Ruslan Merzlyakov

# Searches for Denmark

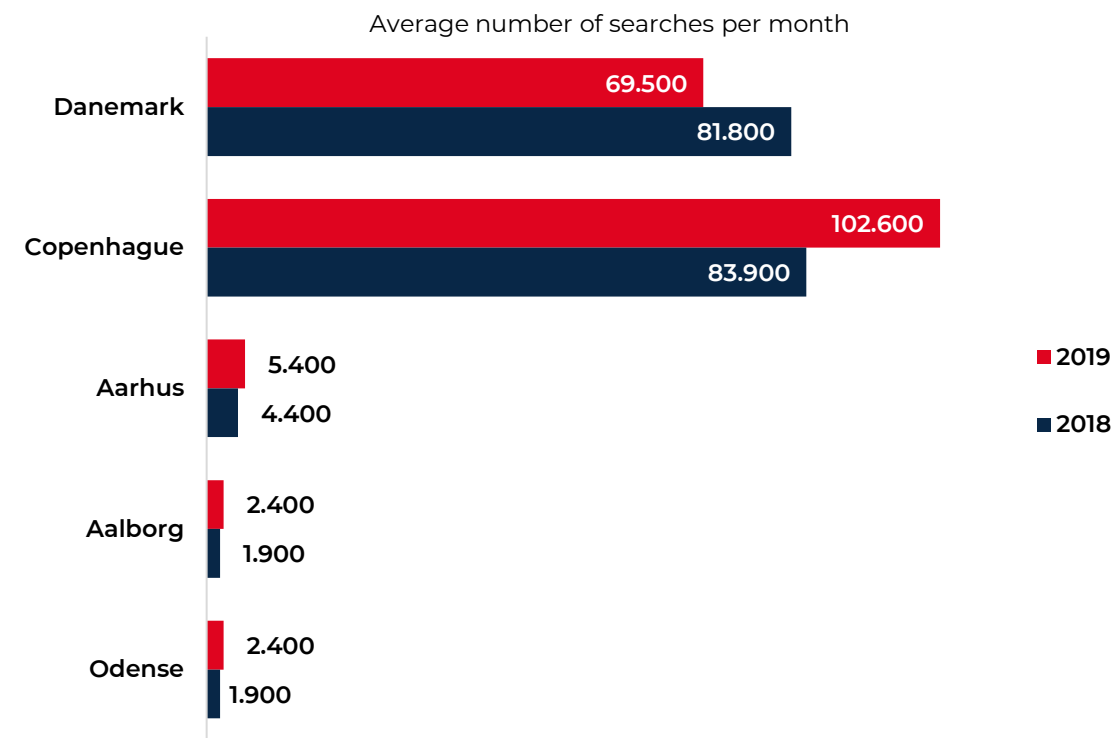
## More online searches for information about the four largest cities in Denmark

There are more searches among the French for Copenhagen and Denmark than for Aarhus, Aalborg and Odense.

In 2019, *Copenhagen* had significantly more searches as a search term than in 2018. The search terms *Aarhus*, *Aalborg* and *Odense* also had more hits in 2019 than in 2018. However, the number of searches for *Danemark* dropped significantly from 2018 to 2019.

This does not reflect whether or not the searches are holiday-related, but the data indicate a high degree of interest for Denmark and particularly for Copenhagen.

## Search volume for Denmark and the four largest cities as search terms





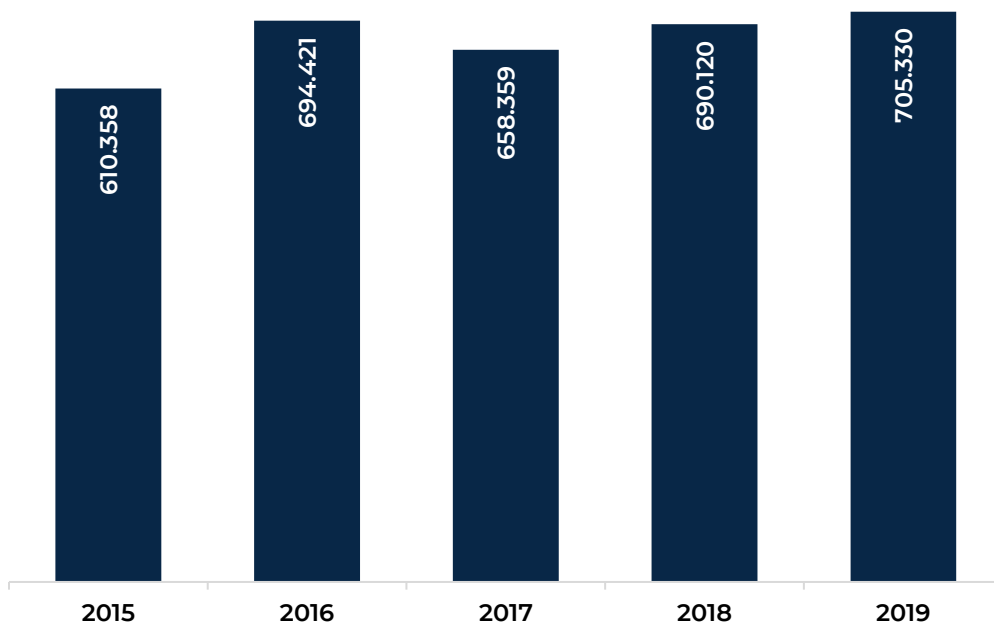
An aerial photograph of a golf course. The foreground shows a large green fairway with a white sand trap. In the middle ground, there is a clubhouse building and several other smaller buildings. The background shows a residential area with houses and trees. The sky is blue with scattered white clouds.

# Passengers and Flight Traffic from France to Copenhagen Airport

**This chapter deals exclusively with flight traffic to and from Copenhagen Airport, and therefore does not cover all flight traffic to and from Denmark**

# Seating Capacity from the French Airports to Copenhagen Airport

Growth in number of seats  
Number of seats



## Increased seating capacity

Growth in seating capacity between the French airports and Copenhagen Airport (CPH) has increased over the last few years.

2019 saw a record number of seats on the routes from the French airports to CPH. The number of seats increased by 2.3% from 2018 to 2019.

Over the period considered, however, the number of seats increased yearly by an average of 3.3%.

Comparing the growth in the number of seats to the one in the number of overnight stays, we notice a slightly higher growth in the latter. In the period between 2015-2019, the number of French overnight stays in Denmark grew by an average of 14.1%.

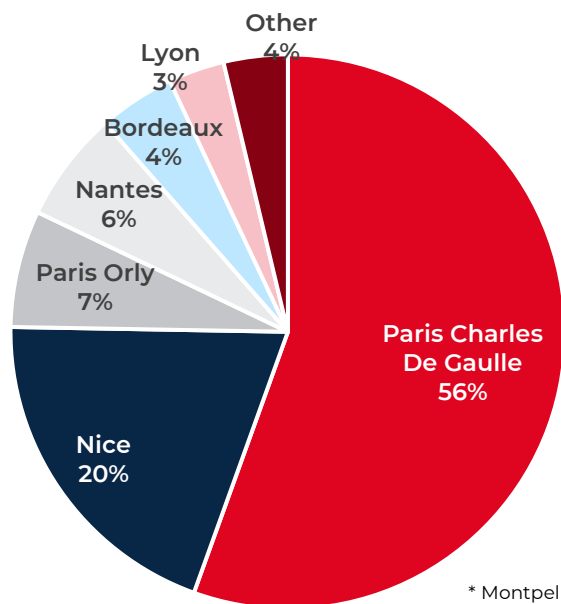
# Seating Capacity in 2019 by Airports and by Airlines

## Paris Charles De Gaulle contributes to over half of the seating capacity

The seats on the routes between Paris' two airports (CDG and ORY) make up 63% of all seats between France and CPH. Nice Airport follows with 20% of the seats.

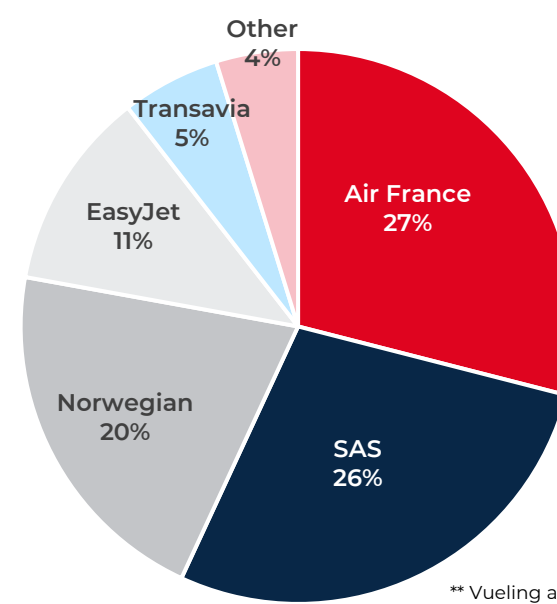
National operators Air France and SAS provide most of the seats (a total of 53%) between the French airports and CPH. Low Cost airlines such as Norwegian, EasyJet, Transavia, Vueling and RyanAir make up for the remaining part.

Seating capacity by airports



\* Montpellier, Toulouse, Bastia, Biarritz and Marseille.

Seating capacity by airlines



\*\* Vueling and RyanAir.

# Number of Passengers from French Airports

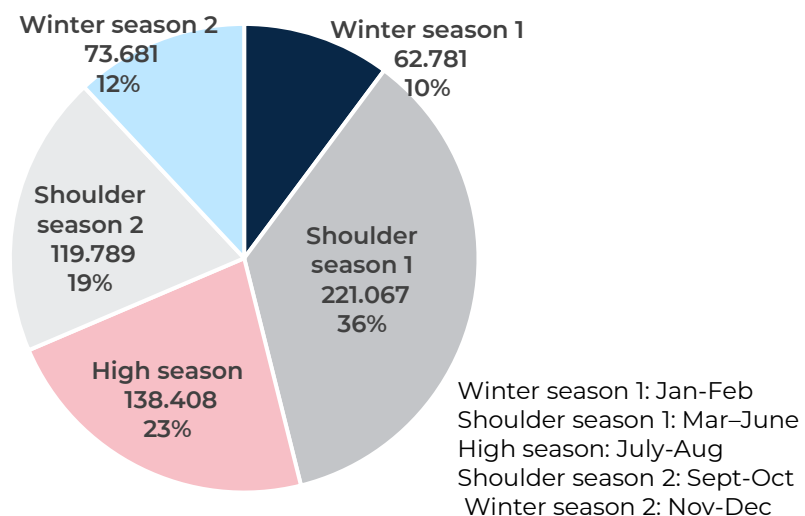
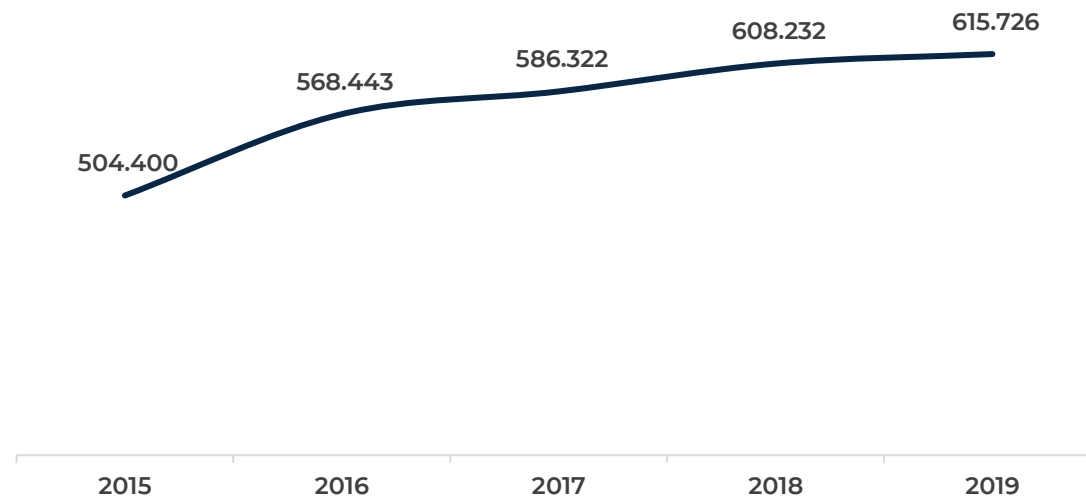
## More passengers during shoulder season

The number of passengers from the French airports to CPH was almost 620,000 in 2019, reaching their highest level over the period considered.

The number of passengers cover the French as well as other nationalities using the French airports either as their initial point of departure or as a transfer hub.

Most of the arrivals registered during shoulder season, fewest during winter. On a monthly average, arrivals are highest during high season.

## Growth in the number of passengers from the French airports to CPH





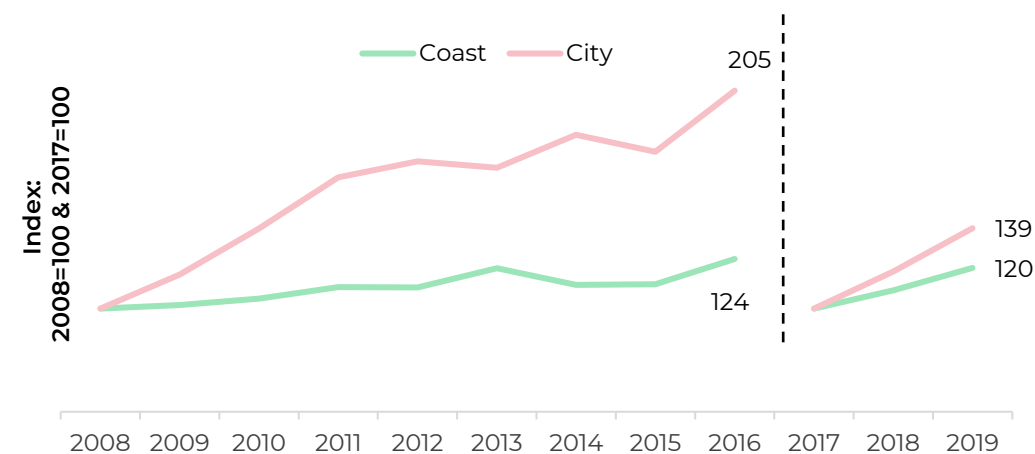
# Coastal and City Tourists in Denmark

# French Accommodation by the Coast and in the City

French overnight stays in coastal and rural areas of Denmark as well as in the four largest cities

	2018 (1,000)	2019 (1,000)	Gwth.
Coastal and rural areas*	60	66	10.0%
The four largest cities*	248	292	+17.7%
<b>Total*</b>	<b>308</b>	<b>358</b>	<b>+16.2%</b>

Growth in French overnight stays\* by the Coast and in the City



Note: Prior to 2017, holiday centres were included under Coast. As of 2017, records of overnight stays in holiday centres have been handled locally. This has made for more accurate records of accommodation distribution between Coast and City. The numbers prior to 2017 are therefore not comparable to the ones from 2017 and onwards.

# Number of French Overnight Stays in the Four Largest Danish Cities

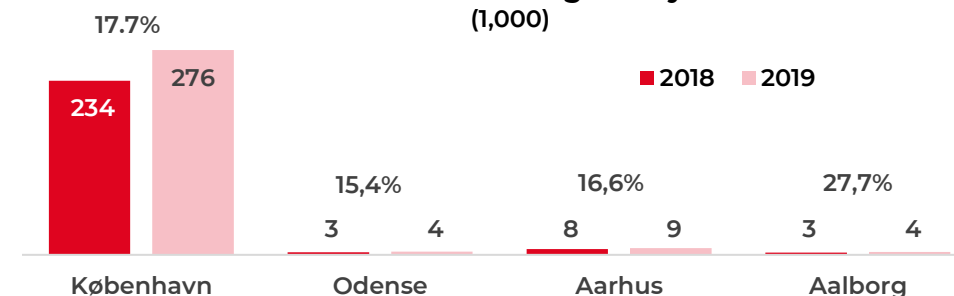
Overnight stays in the four largest cities\*

	Overnight stays (1,000)	Percentage of total	Percentage of foreign overnight stays
Denmark	5,898	45%	
Foreign countries	7,325	55%	
Germany	908	7%	12%
USA	755	6%	10%
UK	725	5%	10%
Sweden	699	5%	10%
Norway	682	5%	9%
Italy	336	3%	5%
France	292	2%	4%
Netherlands	268	2%	4%
China	226	2%	3%
India	96	1%	1%
Other countries	2,338	18%	32%
<b>Total</b>	<b>13,224</b>	<b>100%</b>	<b>100%</b>

Overnight stays (1,000)

	Copenhagen	Aarhus	Aalborg	Odense
Denmark	4,057	865	605	373
Foreign countries	6,542	337	409	128
USA	730	14	5	6
Germany	686	74	131	17
UK	670	28	13	14
Sweden	631	28	27	13
Norway	475	55	141	10
Italy	320	7	4	6
France	276	9	4	4
China	214	7	3	10
Netherlands	206	24	18	12
India	90	4	1,1	0,7
Other countries	2,153	88	61	36
<b>Total</b>	<b>10,508</b>	<b>1,200</b>	<b>1,016</b>	<b>501</b>

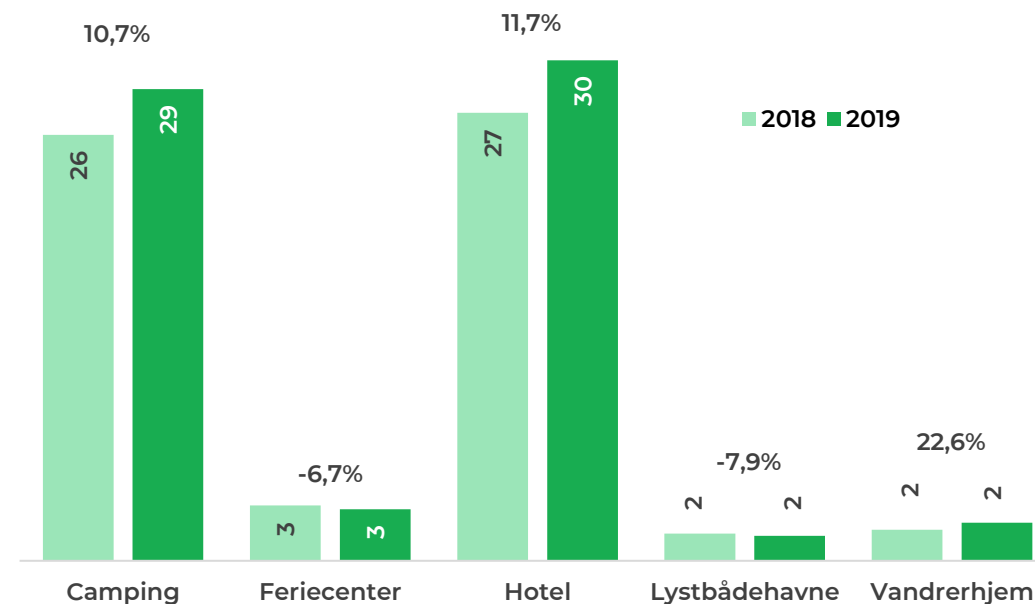
Growth in French overnight stays in cities (1,000)




# Number of French Overnight Stays in Coastal and Rural Denmark

	Overnight stays (1,000)	Percentage of total	Percentage of foreign overnight stays
Denmark	21,303	50%	
Foreign countries	21,532	50%	
<hr/>			
Germany	15,871	37%	74%
Norway	1,641	4%	8%
Netherlands	1,168	3%	5%
Sweden	1,014	2%	5%
UK	182	0%	1%
USA	81	0%	0%
France	66	0%	0%
China	49	0%	0%
Italy	50	0%	0%
India	12	0%	0%
Other countries	1,400	3%	6%
<b>Total</b>	<b>42,836</b>	<b>100%</b>	<b>100%</b>

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





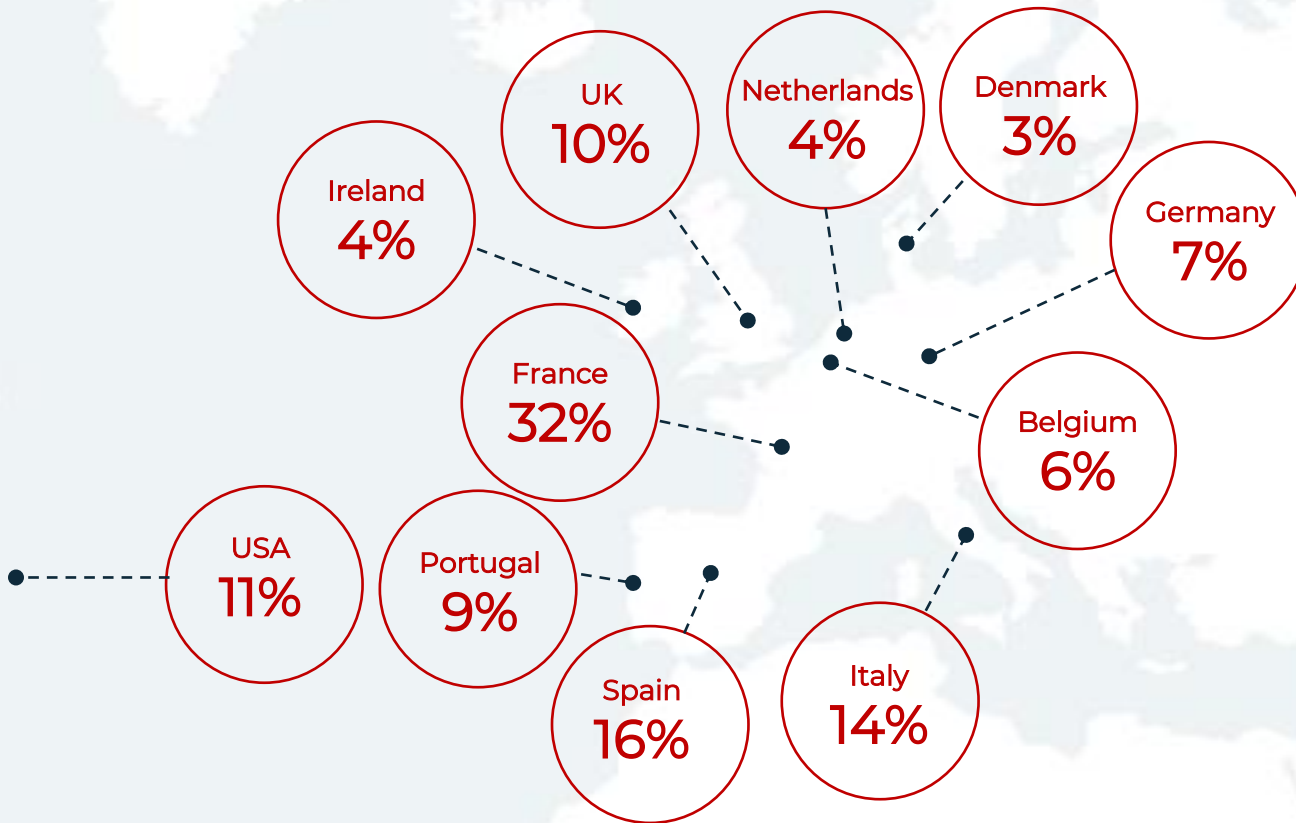


# **Market Expectations prior to the Outbreak of the COVID-19 Pandemic**

Photo: Mark Wengler

# Market Expectations for Holidays in 2020

Which destination/s are you contemplating visiting in 2020?  
Selected holiday destinations



**3% of the French intend to visit Denmark on holiday in 2020**

A total of 3% intend to visit Denmark on holiday in 2020, while 32% intend to holiday in France\*.

Travel plans to Denmark are comparable to those to the Netherlands and Ireland.

The most popular foreign destinations are southern European countries, such as Spain and Italy, followed by the US and UK.

# Denmark's Potential in Terms of Business

## - prior to the Outbreak of the COVID-19 Pandemic



### Coastal holiday with children

**36%**

of the French population would like a coastal or rural holiday with children

Percentage:

**7%**  
Denmark

**59%**  
France



### Coastal holiday without children

**32%**

of the French population would like a coastal or rural holiday without children

Percentage:

**4%**  
Denmark

**58%**  
France



### City break without children

**18%**

of the French population would like a city break without children

Percentage:

**14%**  
Copenhagen

**2%**  
Aarhus



# Knowledge Centre on Tourism in Denmark

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