

Wildersgade
52-32



ITALY

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/markedsp profiler

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VisitDenmark's Market Office in Milan

The French and Italian markets



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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 hilly, forested area on the right. A winding road is visible in the foreground, leading towards the town. The sky is a mix of orange, pink, and blue, indicating the time is either dawn or dusk. The water is a deep blue, and the land is covered in green and brown vegetation.

Key Data and Target Groups

Market Potential

The number of Italian overnight stays in Denmark increased in 2019; in fact, we have seen an increase for eight consecutive years now.

The Italians are particularly drawn towards the Danish cities, which saw a growth of 3.9% in the number of overnight stays in 2019. However, the number of Italian overnight stays in coastal and rural areas dropped by 3.2% in 2019 compared to 2018.

Around one in four Italians in Milan and Rome know Denmark as a holiday destination. More than half of them view Denmark as an attractive holiday destination.

When it comes to choosing a holiday destination for their city breaks, the Italians put historical and cultural landmarks on top of their list. When choosing a coastal or rural destination on the other hand, reasons for travelling are mainly recreational.

Peace and quiet are some of the words the Italians associate with Denmark, which means there might be significant untapped potential for Italian overnight stays in coastal and rural areas of Denmark.



Selected Conclusions

Over 1.8 m Italian overnight stays

Around 563,000 Italians have been eyeing Denmark in 2020. This information is taken from our Image and Potential Analysis conducted during spring 2020 (prior to COVID-19). Considering the average length of stay, this represents more than 1.8 m overnight stays.

Growth in number of overnight stays continues

The number of Italian overnight stays in Denmark increased by 2.9% from 2018 to 2019. In absolute terms, this means a growth of 10,900 overnight stays. The Italians primarily make use of the Danish hotels as their means of accommodation. The Italians are particularly drawn towards the Danish cities, which have seen a growth of 3.9% in the number of overnight stays. However, the number of Italian overnight stays in coastal and rural areas dropped by 3.2% in 2019 compared to 2018.

Denmark has the largest number of overnight stays within the Nordic competition field

Denmark has a Nordic market share of Italian overnight stays of 33%, and experienced a growth rate of 96% in the period from 2008-2019. The Danish growth rate is significantly higher than those of Norway, Sweden, or Finland. Thanks to this market growth, Denmark now has the largest number of Italian overnight stays among the Nordic countries. These figures reveal a potential for gaining further market shares, provided Denmark maintains its momentum.

Copenhagen's strong position

Copenhagen accounts for 52% of all Italian urban overnight stays in the Nordic countries, and as such holds a strong position within the Nordic competition field. However, potential for further growth does exist in order to maintain and strengthen this position.

Possible potential outside of Copenhagen

82% of Italian overnight stays take place in Copenhagen. Still, coastal and rural areas in Denmark are perceived as an attractive destination, especially among families with children.

Denmark viewed as an attractive destination by many Italians

Respectively 58% and 55% of people from Rome and Milan give Denmark a high score on a scale of attractive holiday destinations. Limited knowledge of Denmark as a holiday destination, however, remains a challenge.

Close correlation between attractiveness and knowledge

Our Image and Potential Analysis shows a close correlation between knowledge of Denmark as a holiday destination and Denmark's attractiveness rating. There is therefore a higher level of knowledge among those who give Denmark a high score on a scale of attractive holiday destinations.

Who are the Italian tourists, and what are they looking for?

They are under the age of 55, from Rome and Milan or thereabouts, with an upper-middle income. They are looking for authentic experiences, such as historic or royal experiences, Danish food specialities, cycling culture, and they also show interest in architecture and design.

Perspectives on the Italian Travel Market

by Ghita Scharling Sørensen, Market Director:

"In Italy, 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

386,700

overnight stays in 2019

10,900

additional overnight stays compared to 2018

2.9%

increase in overnight stays compared to 2018

-11.1%

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

1.3 bn DKK

in Tourism Turnover in 2018

22%

of Italians living in Rome are acquainted or well acquainted with Denmark as a holiday destination

25%

of Italians living in Milan are acquainted or well acquainted with Denmark as a holiday destination



Coastal and Nature Tourism

50,200

overnight stays*

-3.2 %

growth compared to 2018



City Tourism

336,400

overnight stays*

3.9%

growth compared to 2018

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)

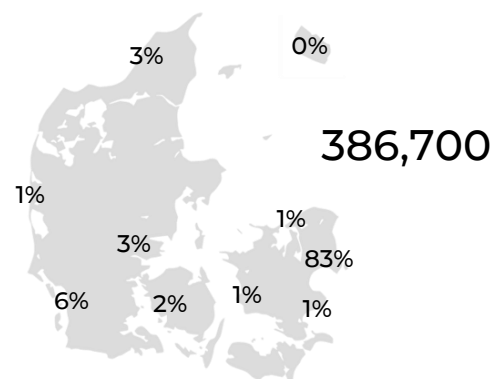


-  City break
-  Family

Residence



Italian overnight stays by regions*



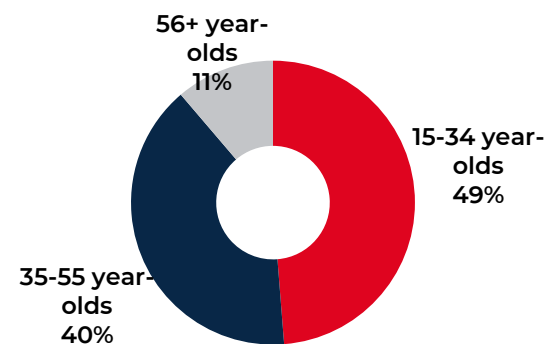
Household income



Education



Italian city tourists in Denmark



Functional necessities



- Weekend/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: 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

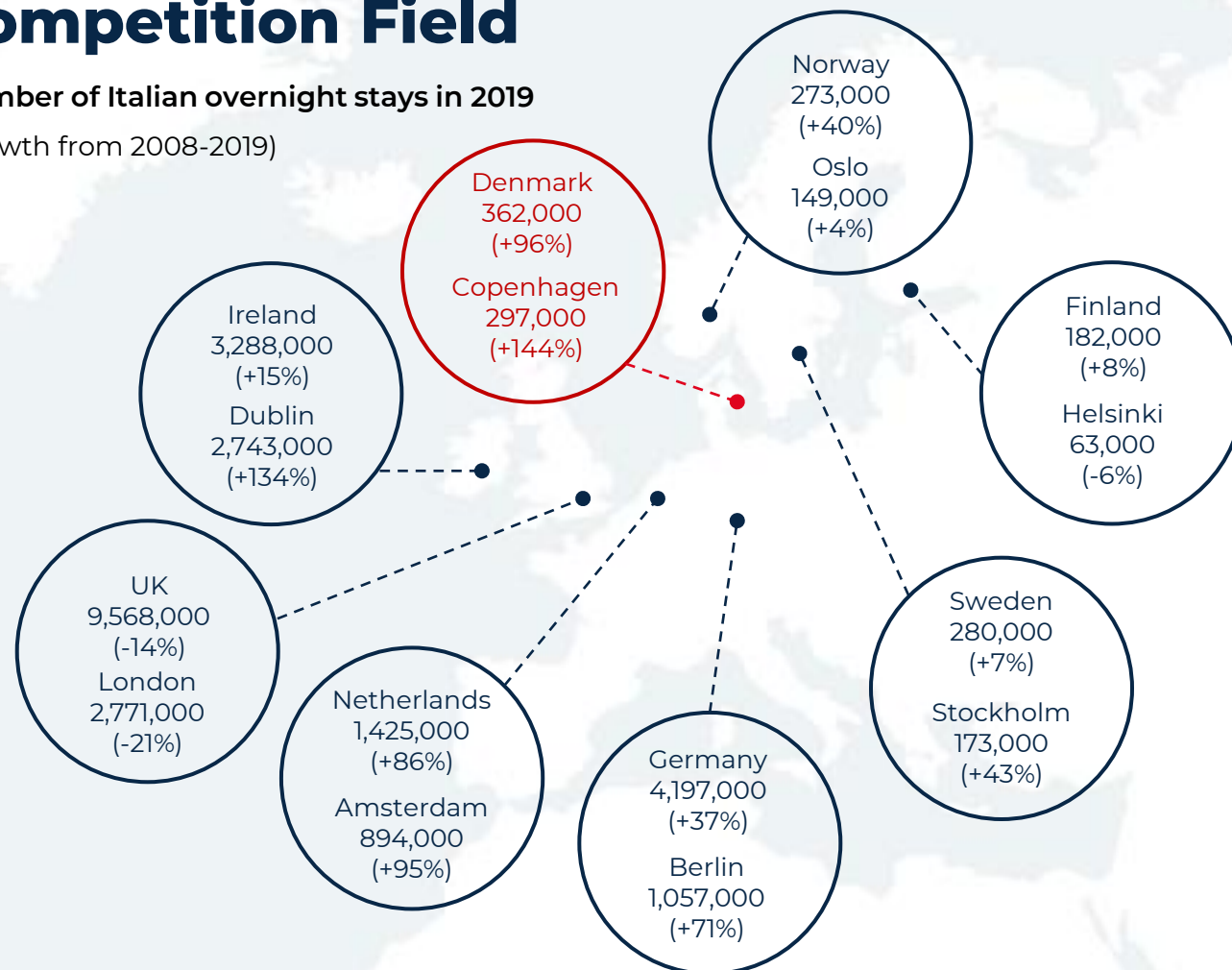


Accommodation, Turnover and Seasonality

Italian Overnight Stays in the Northern European Competition Field

Number of Italian overnight stays in 2019

(growth from 2008-2019)



Highest growth in Italian overnight stays

In 2019, Denmark had the highest number of Italian overnight stays among the Nordic countries. With a growth of 96% in the number of overnight stays from 2008 to 2019, the Danish growth rates are well above the ones of the other Nordic countries.

Copenhagen accounted for more than half of all Italian overnight stays in the Nordic cities (52%) in 2019, with a total of 297,000 overnight stays.

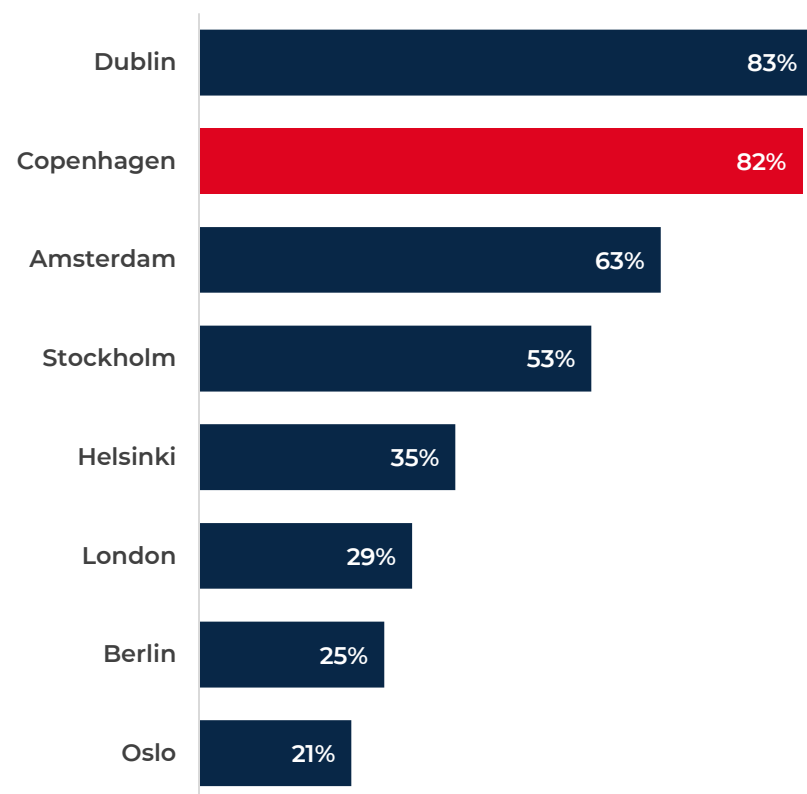
If you look at the entire European competition field, then Germany, Netherlands, UK and Ireland have significantly more Italian overnight stays, but none of these countries have seen growth rates quite like the Danish ones.

The capitals of the four aforementioned countries attracted a significantly higher number of Italian overnight stays in 2019, compared to Copenhagen.

Overnight Stays in the Capitals of Northern Europe

Italian 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 82% of all Italian overnight stays in Denmark

Within the northern European competition field, the percentages of Italian overnight stays in each capital vary greatly.

Dublin and Copenhagen lie at the very top, attracting approximately eight out of 10 (83% and 82% respectively) of all Italian overnight stays in Ireland and Denmark.

We see the opposite with Berlin and Oslo, at the bottom of the list, with respectively 25% and 21% of all Italian overnight stays in Germany and Norway.

Growth in Italian Overnight Stays

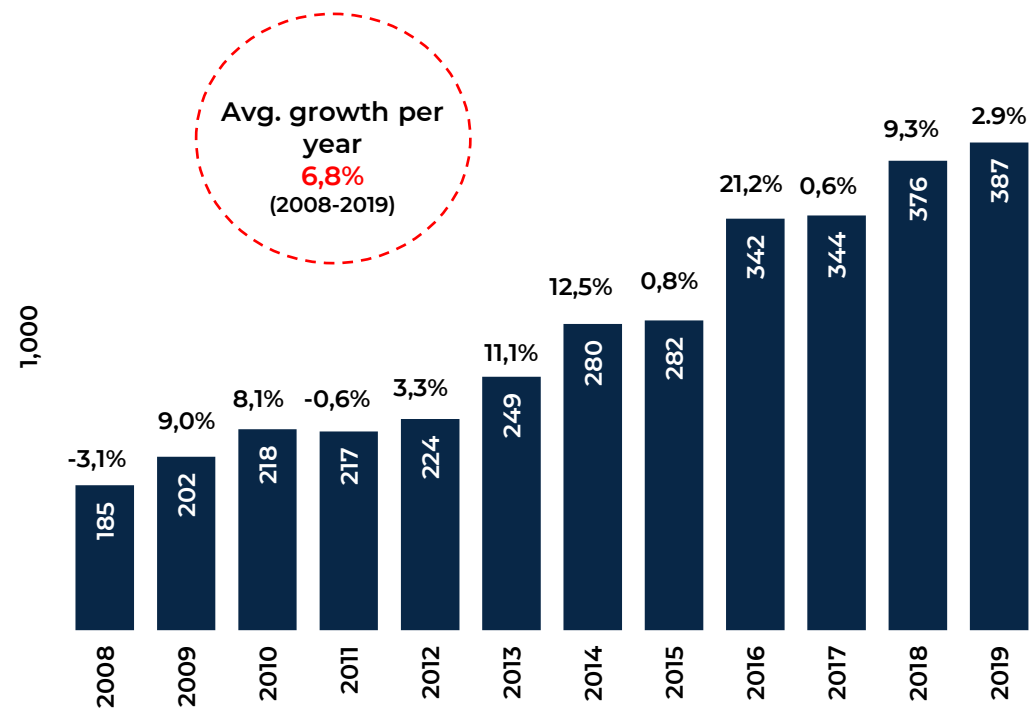
Growth in the number of Italian overnight stays in Denmark

In 2019, the Italians spent 386,700 nights in Denmark.

Compared to 2018, the number of Italian overnight stays in Denmark increased by 2.9% in 2019.

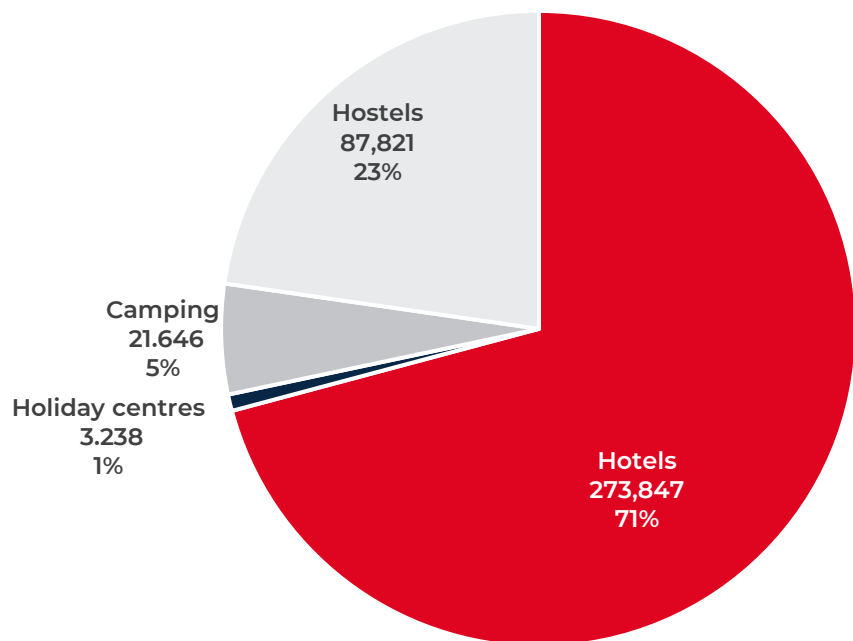
Italian overnight stays in Denmark

Numbers and growth compared to the year before

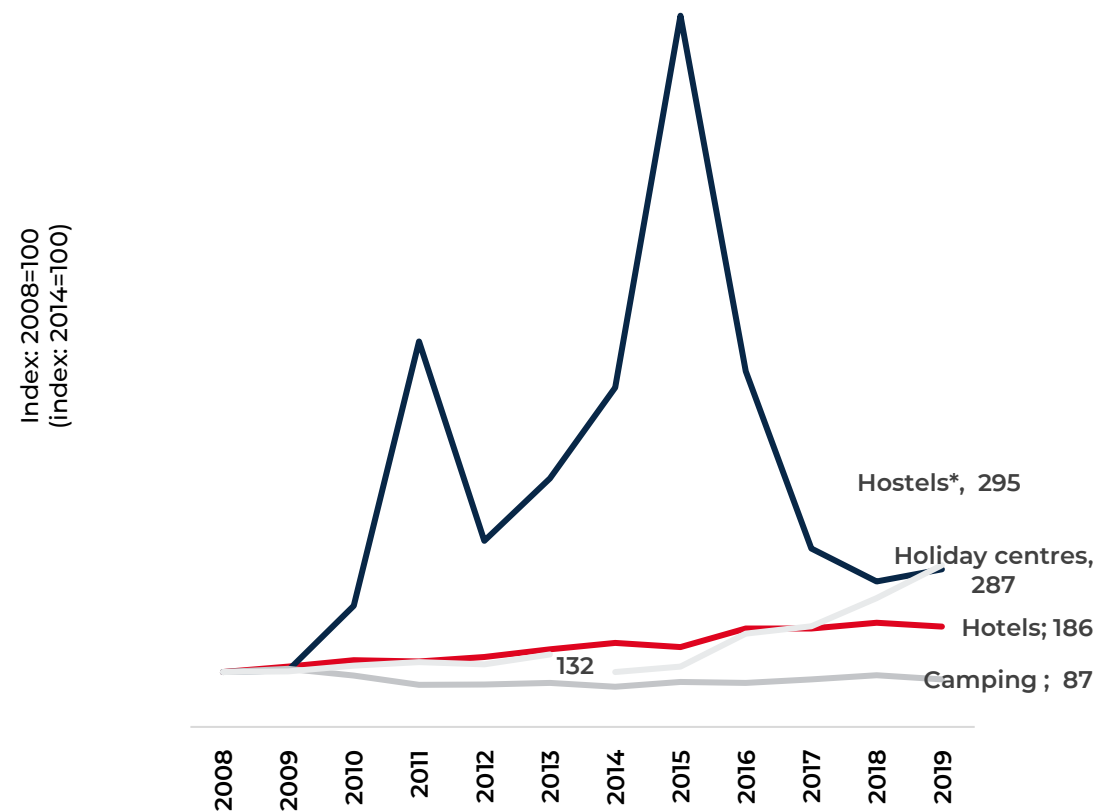


Italian Overnight Stays by Accommodation Types

Italian Overnight Stays in Denmark in 2019



Growth in Italian Overnight Stays in Denmark



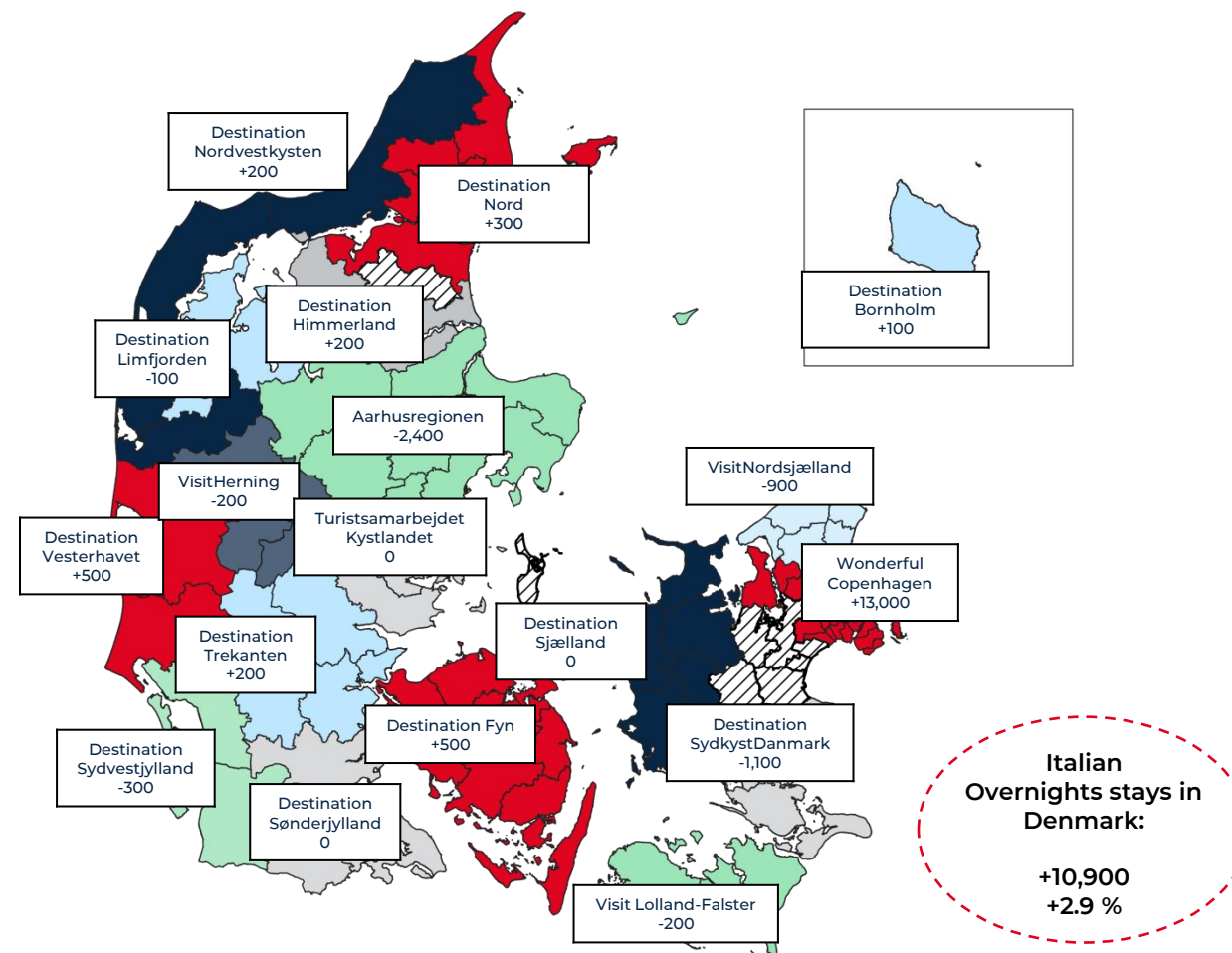
s. 14 Source: Danmarks Statistik.* Due to new population from 2014, breaches may occur. Not comparable with numbers prior to 2014. Index: 2014=100.

Overnight Stays by Destination Marketing Organisations

Italian overnights stays by DMOs

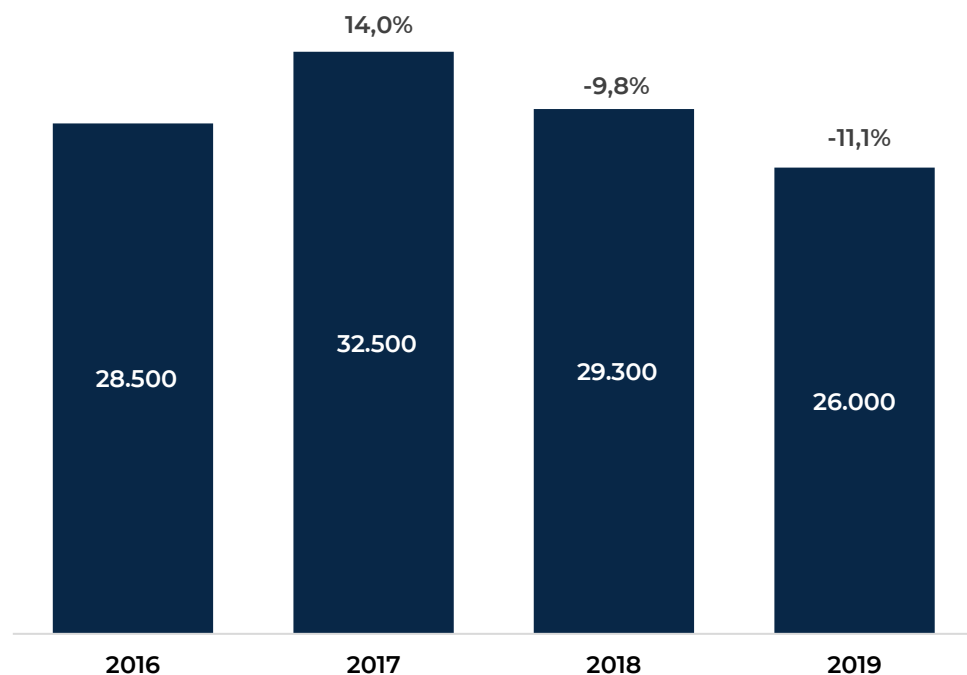
	Number of overnight stays 2019	Growth compared to 2018
Wonderful Copenhagen	321,052	4.2%
Destination Trekanten	16,671	1.0%
Aarhusregionen	9,556	-20.3%
Destination Fyn	8,310	6.2%
Destination Nord	6,713	4.3%
Destination Sydvestjylland	4,057	-7.5%
Destination SydvestDanmark	3,376	-23.8%
Destination NordVestkysten	3,091	8.8%
VisitNordsjælland	2,472	-26.3%
Destination Vesterhavet	1,578	46.7%
Turistsamarbejdet Kystlandet	1,059	-3.5%
Destination Sønderjylland	1,041	1.1%
VisitHerning	923	-15.7%
Destination Sjælland	807	-1.8%
VisitLolland-Falster	661	-20.5%
Destination Himmerland	450	56.8%
Destination Bornholm	395	15.5%
Destination Limfjorden	385	-11.9%
Outside any destination	4,054	35.8%

Growth in number of Italian overnight stays from 2018 to 2019



Italian Tourists on Sharing Economy Platforms

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



Copenhagen holds the highest number of Italian overnight stays with AirBnB

Since 2017 there has been a negative growth in the number of Italian tourists in Denmark booking nights through Airbnb.

In 2017, the number of tourists was 32,500 against 26,000 in 2019, representing a decrease of 20%.

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

Italian 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	6,642	19,395	16,914	1,115	461	905
Pct.	26%	74%	87%	6%	2%	5%

Accommodation at Home and Abroad

	Italian Overnight stays 2019 (1,000)	Percentage of European overnight stays	Growth from 2018 to 2019
Italy	217,572		2%
Europe	100,651		4%
The rest of the world	63,082		12%
Total	381,305		4%
France	43,682	43%	5%
Spain	12,611	13%	7%
UK	9,569	10%	1%
Croatia	5,141	5%	2%
Germany	4,196	4%	6%
Ireland	3,288	3%	-2%
Greece	2,970	3%	-7%
Austria	2,921	3%	2%
Malta	2,544	3%	6%
Portugal	1,603	2%	1%
Netherlands	1,425	1%	7%
Albania	1,322	1%	13%
Slovenia	1,279	1%	-4%
Czech Republic	1,098	1%	0%
Switzerland	899	1%	-2%
Hungary	667	1%	-3%
Poland	657	1%	-5%
Belgium	638	1%	11%
Turkey	538	1%	33%

Tourism Turnover 2018

Market	Tourism Turnover 2018 (m DKK)	Percentage of foreign tourism turnover 2018
Total	132,484	
Denmark	74,809	
Foreign countries	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%
France	1,592	3%
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%

Italy	Turnover 2018 (m DKK)	Percentage
Visits with paid accommodation		
Hotel – holiday	347	33%
Hotel – business	382	37%
Holiday centre	2	0%
Camping	88	8%
Hostel	54	5%
Rented holiday home	-	-
Yacht	0	0%
Sharing Economy platforms	152	15%
Others*	17	2%
<i>Total</i>	<i>1,043</i>	<i>83%</i>
Visits with free accommodation		
<i>Total</i>	<i>220</i>	<i>17%</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

'0' specifies values <0.05 m DKK '-' specifies the value 0.

Italian Overnight Stays Throughout the Year

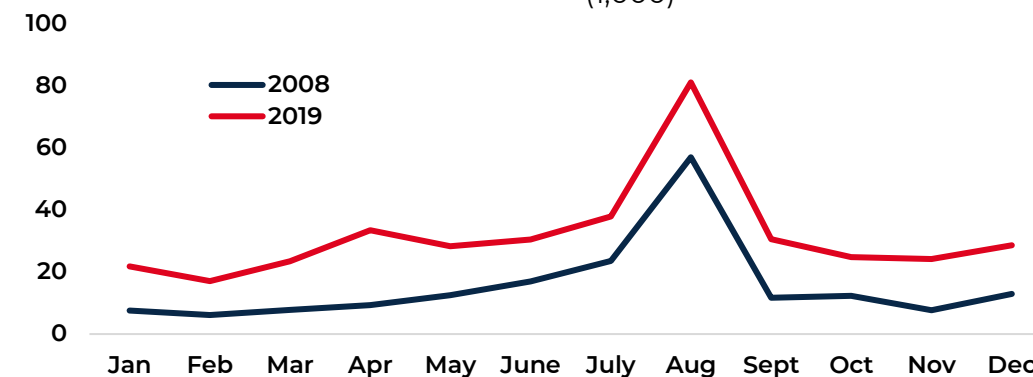
More Italian overnight stays in-season as well as off-season

From 2008 to 2019, the number of Italian overnight stays in Denmark increased by 109%. This increase mainly took place during the shoulder and winter seasons.

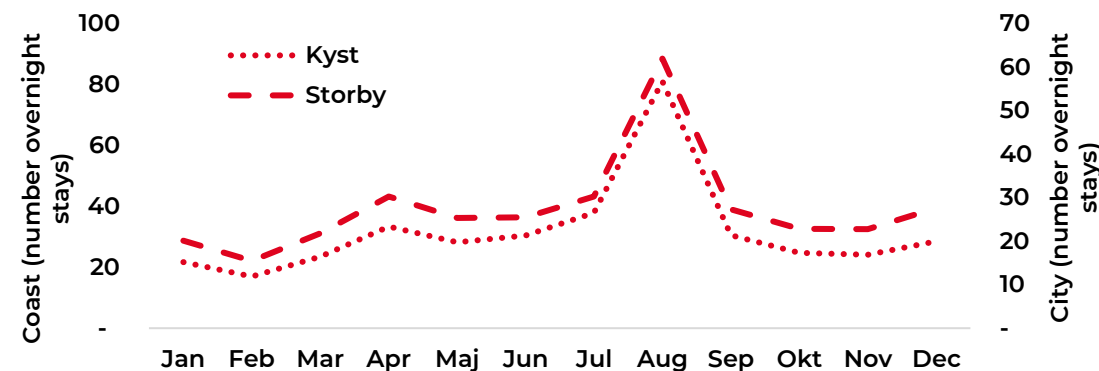
	2008	2019	2008	2019
	Number (1,000)		Index (2008=100)	
High	81	120	100	149
Shoulder	70	173	100	246
Winter	34	93	100	273
Total	185	387	100	209

The accommodation pattern among Italians on city breaks in Denmark is almost identical to the one among Italian on coastal and nature tours.

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



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



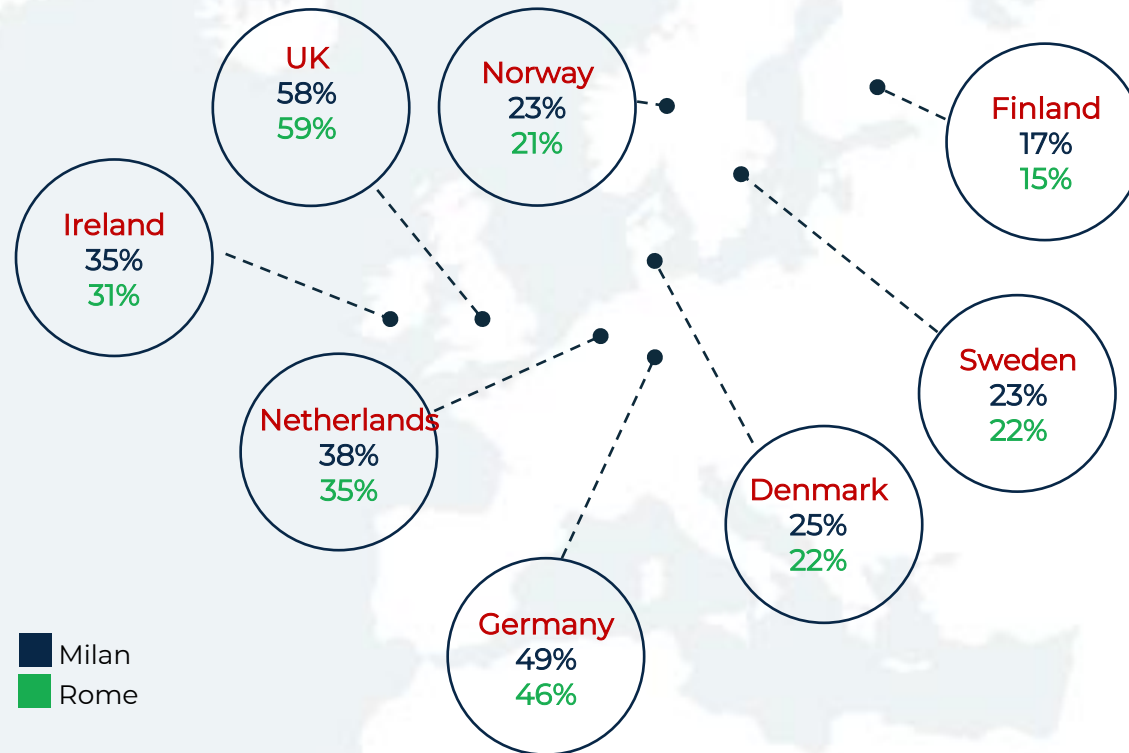
Note: High season: July-August, shoulder season: March-June and September-October, winter season: January-February and November-December.



Knowledge and Inspiration

Knowledge of Holiday Destinations

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



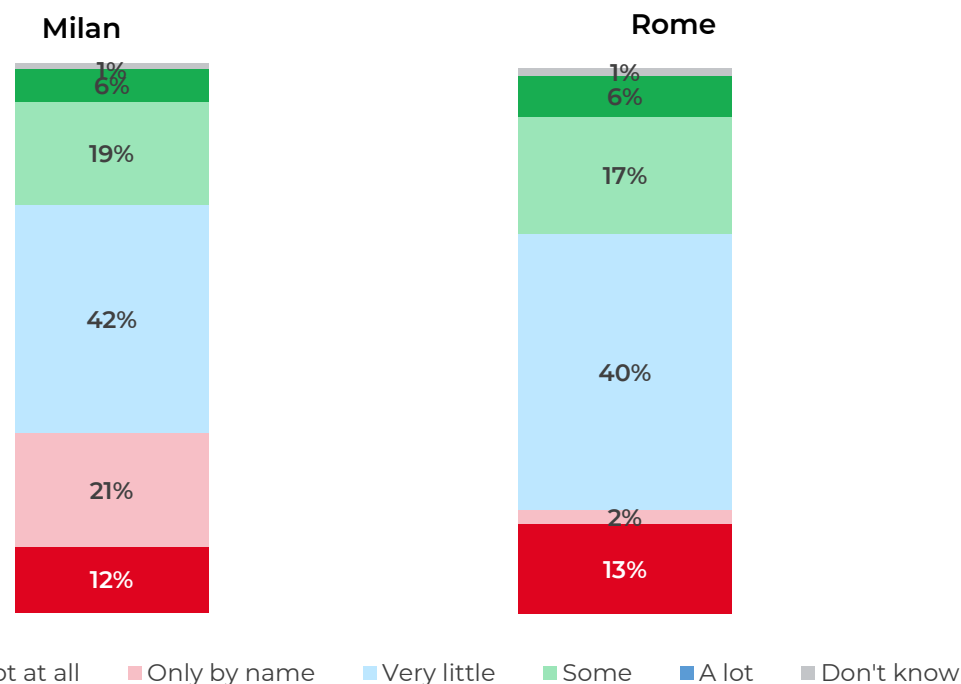
More than one in five Italians in Rome and Milan know 'some' or 'a lot' about Denmark as a holiday destination

In Milan, 25% know 'some' or 'a lot' about Denmark. The corresponding numbers in Rome are 22%.

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

Knowledge of Denmark as a Holiday Destination

How well do you know Denmark as a holiday destination?

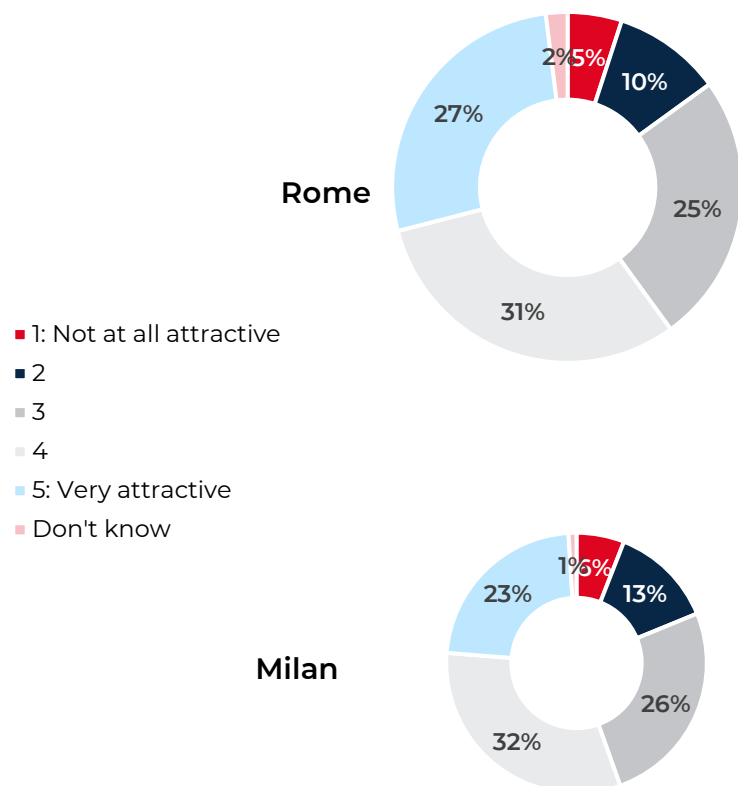


High level of knowledge in Rome as well as in Milan

In Milan, 25% responded knowing some or a lot about Denmark as a holiday destination. The corresponding numbers for the Italians living in Rome are 23%.

Denmark as an Attractive Holiday Destination

How would you judge Denmark as a holiday destination?



Over half of the Italians in Rome and Milan are positive about Denmark as a holiday destination

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

Approximately half (54%) of the Italians in Milan and about six out of 10 (58%) Italians in Rome view Denmark as an attractive holiday destination.

Happy guests and unique experiences are paramount to positive reviews of Denmark, once the Italians return from their holiday. Personal recommendations are key with a lot of Italians 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, and the sky is filled with stars and a bright light source on the horizon. The text "Holiday-Related Online Search" is overlaid in white.

Holiday-Related Online Search

Photo: Ruslan Merzlyakov

Searches for Denmark

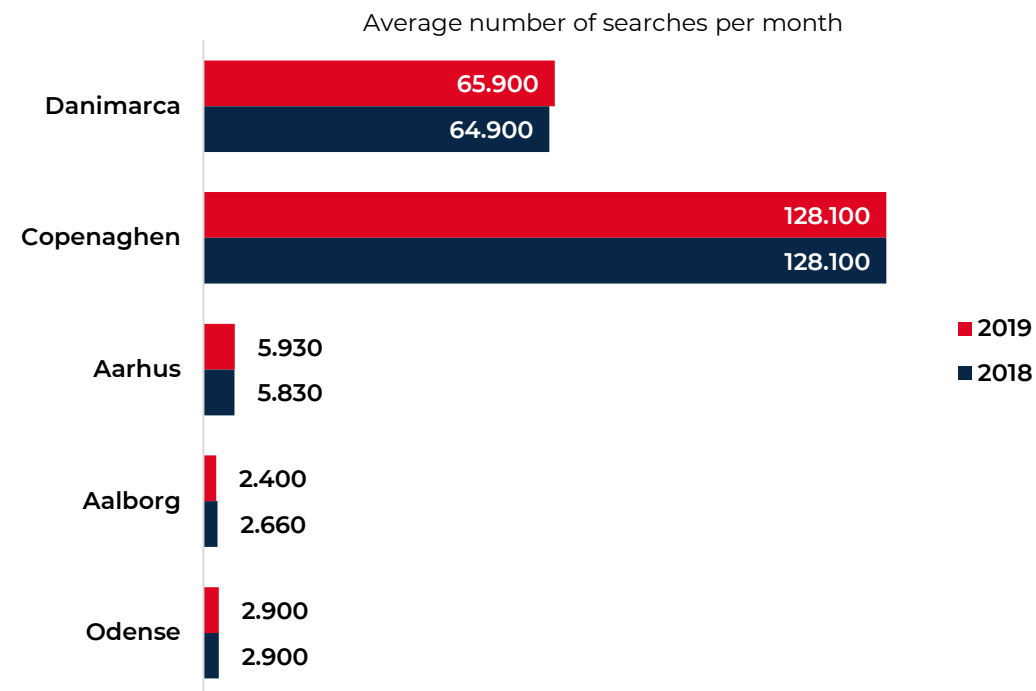
Copenhagen is the most popular keyword

The Italians search considerably more for Copenhagen and Denmark than for Aarhus, Aalborg and Odense. *Copenhagen* is popular with almost twice as many searches as *Danimarca*.

In 2019, searches for *Danimarca* and *Copenhagen* as search terms were roughly the same as in 2018. The same can be said for the search terms *Aarhus* and *Odense*. The number of searches for *Aalborg* dropped slightly from 2018 to 2019.

The data do not reflect whether or not these searches are holiday-related; however, they do indicate a high degree of interest in particular for Copenhagen, but also for Denmark in general.

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



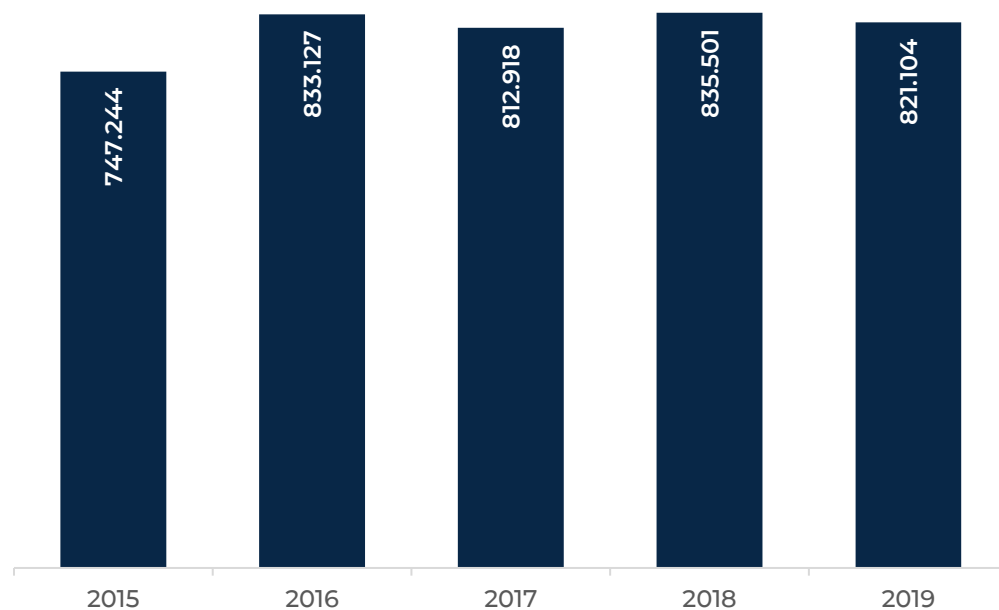


Passengers and Flight Traffic from Italy to Copenhagen Airport

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 Italian Airports to Copenhagen Airport

Growth in seating capacity
Number of seats



Seating capacity remains unchanged

From 2015 to 2019, there was an average of 810,000 seats on the routes from the Italian airports to Copenhagen Airport (CHP).

This number decreased by 1.7% in 2019, compared to 2018.

Over the period considered, however, the number of seats increased yearly by an average of 2.4%.

Comparing the growth in the number of seats to the one in the number of overnight stays, the growth in the latter is somewhat higher. In the period between 2017-2019, the number of Italian overnight stays in Denmark grew by an average of 8.2%.

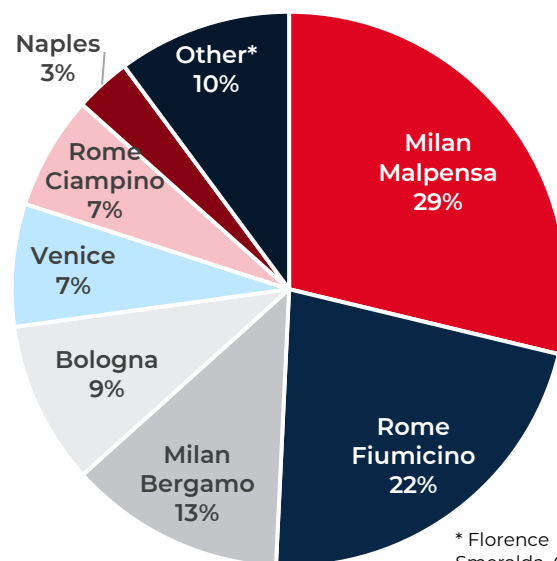
Seating Capacity in 2019 by Airports and by Airlines

SAS provides 41% of the seating capacity

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

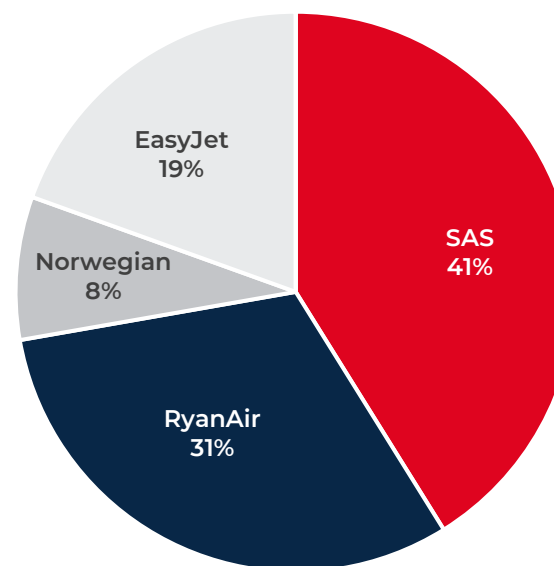
SAS provides the most seats (41%). Low Cost airlines such as RyanAir, Norwegian, EasyJet and Vueling provide the remaining seating capacity and hence the majority of the capacity between the Italian airports and CPH.

Seating capacity by airports



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

Seating capacity by airlines



Number of Passengers from Italian Airports

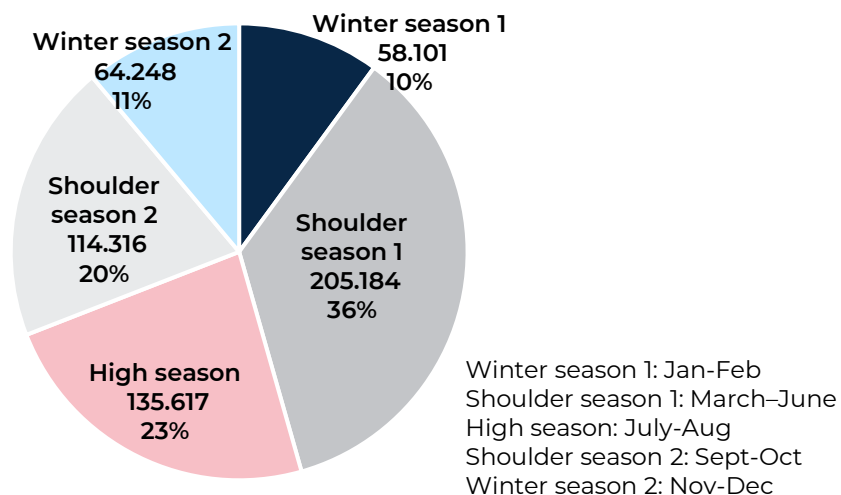
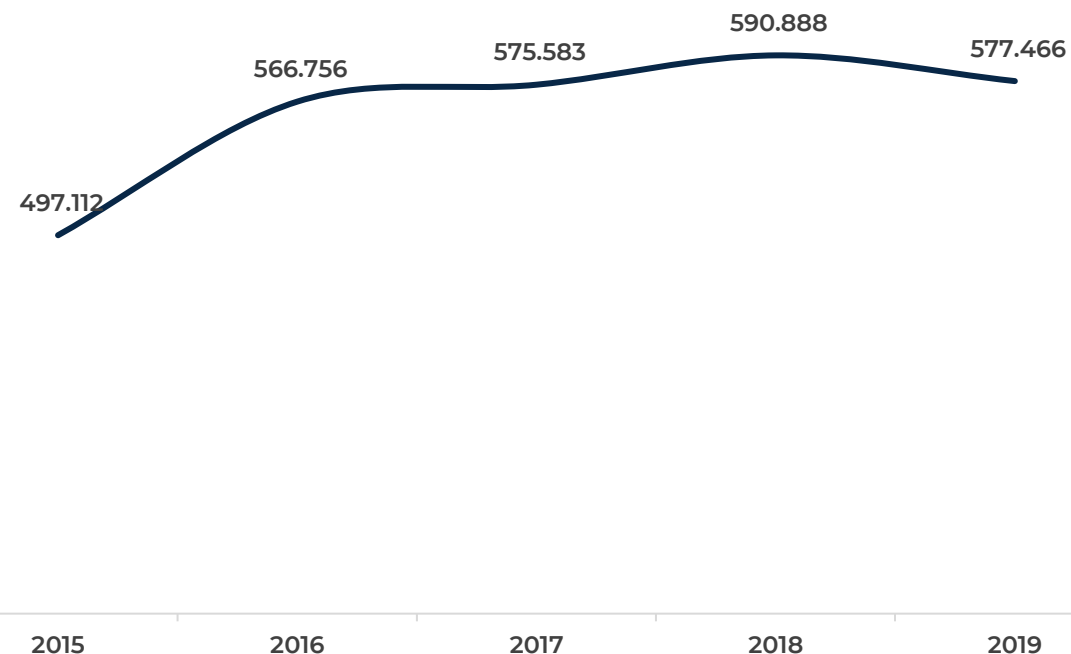
More passengers during shoulder season

The number of passengers from the Italian airports to CPH was almost 580,000 in 2019. This is the second highest number in a year after the record levels of 2018.

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

Most of the arrivals registered during shoulder season, fewest during winter. Considering a monthly average, more passengers came during high season.

Growth in number of passengers from the Italian airports to CPH



A scenic view of a coastal town in Denmark at sunset. The foreground shows the red-tiled roofs of buildings, with a blue windmill on the right. The background features a grassy hillside with several houses and a windmill in the distance. The sky is filled with soft, golden light from the setting sun.

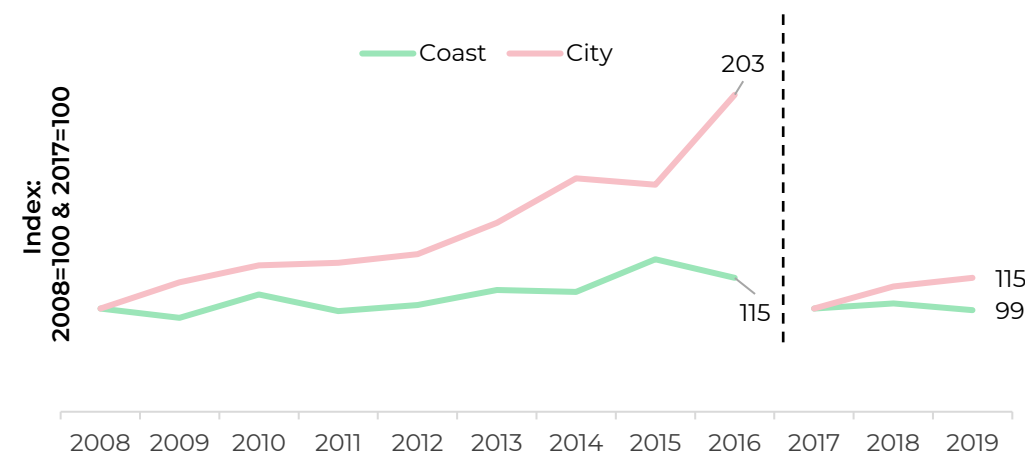
Coastal and City Tourists in Denmark

Italian Accommodation by the Coast and in the City

Italian 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*	52	50	-3.2%
The four largest cities*	324	326	+3.9%
Total*	376	387	+2.9%

Growth in Italian overnight stays* by the Coast and in the City

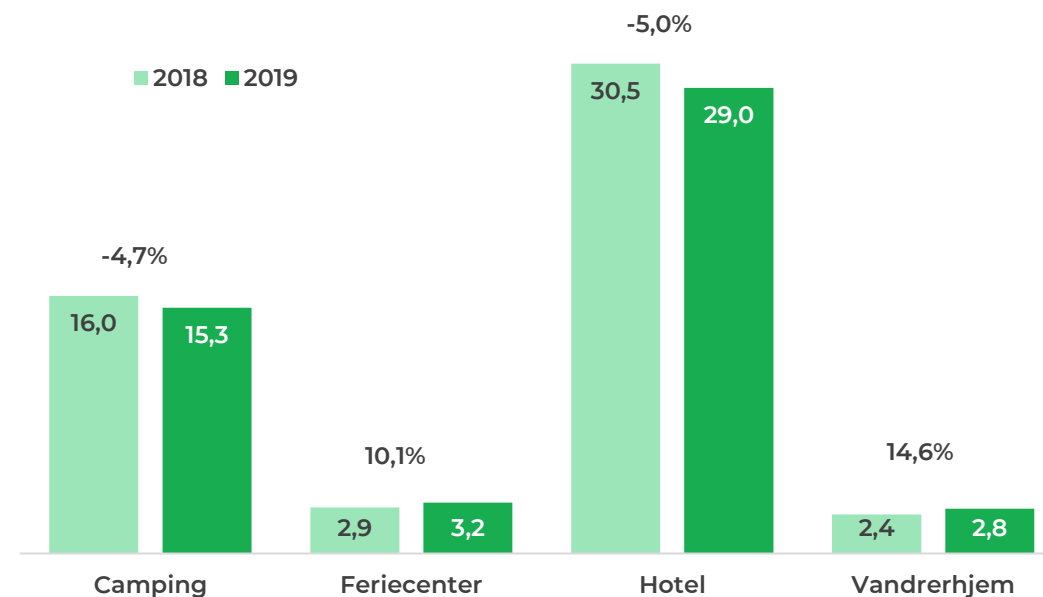


Note: Prior to 2017, holiday centres were included under Coast. As of 2017, records of overnight stays in holiday centres have been handled locally. This has made for more accurate records of accommodation distribution between Coast and City. The numbers prior to 2017 are therefore not comparable to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

Italian Accommodation 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%
Total	42,836	100%	100%

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



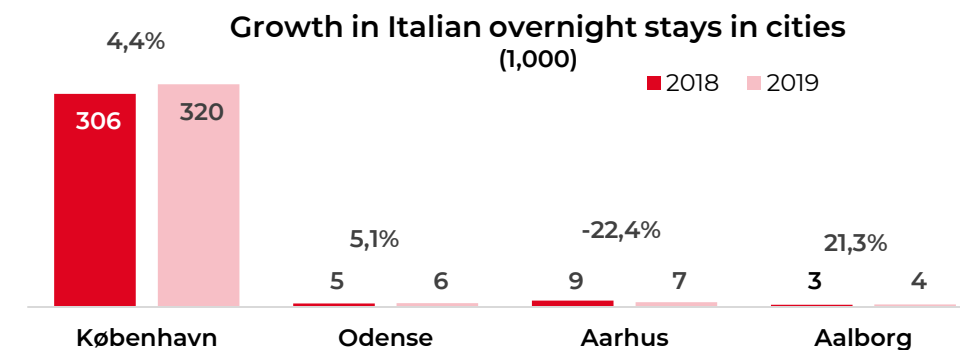
Italian Accommodation in the Four Largest Danish Cities

Total number of overnight stays in the four largest cities*

	Overnight stays (1,000)	Percentage of total	Percentage of foreign overnight stays
Denmark	5,898	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%
Total	13,224	100%	100%

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
Total	10,508	1,200	1,016	501



A wide-angle landscape photograph capturing a sunset or sunrise. The sun is positioned on the left side of the frame, partially obscured by a large, dark, billowing cloud that dominates the upper left and center. The sky transitions from a deep blue at the top to a bright, golden-yellow glow near the horizon. Below the horizon, a winding river flows through a valley, reflecting the light from the sun. The surrounding hills and fields are bathed in the warm, golden light of the low sun, creating a sense of tranquility and hope. The overall mood is one of a bright future despite current challenges.

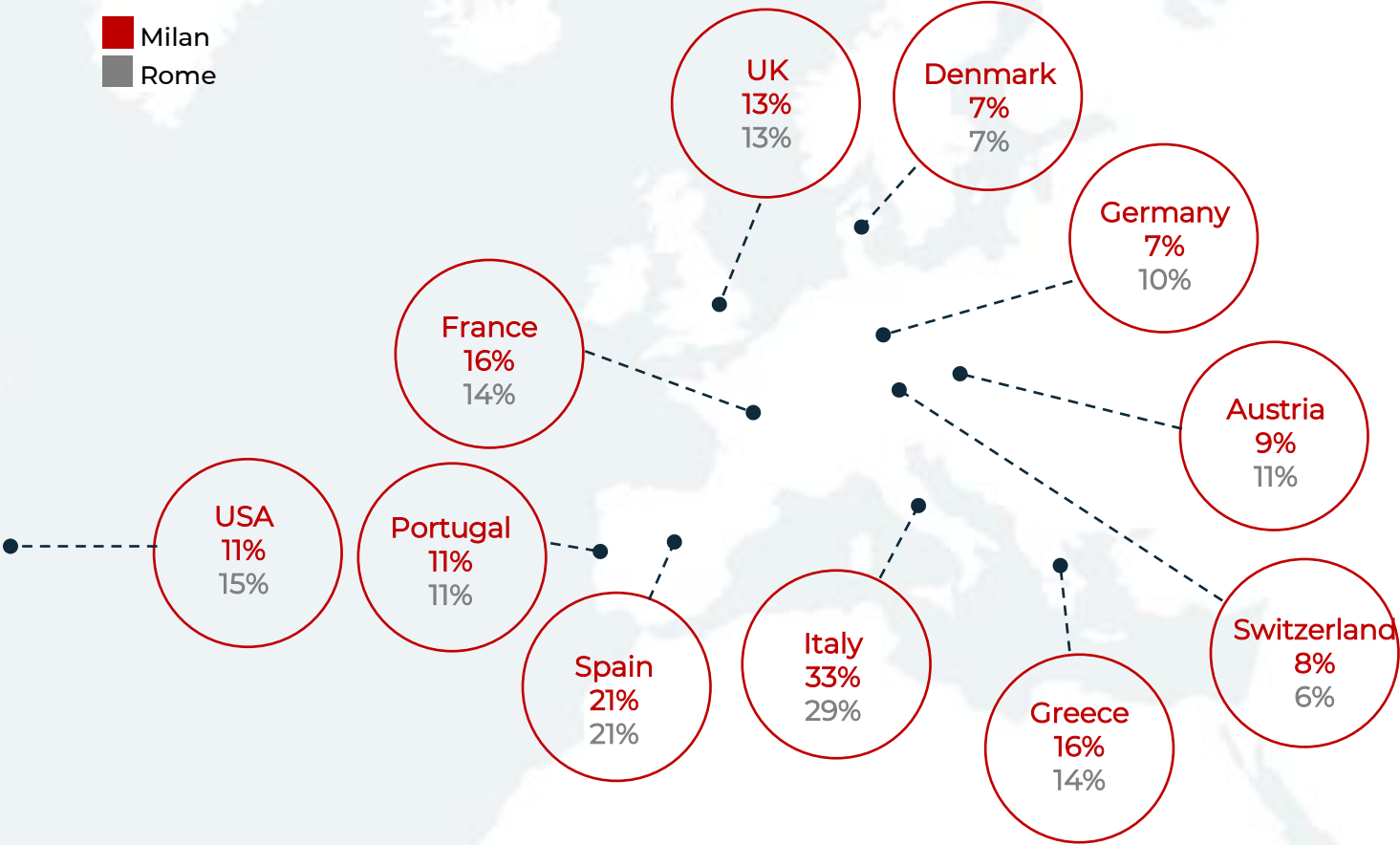
Market Expectations prior to the Outbreak of the COVID-19 Pandemic

Photo: Mark Wengler

Holiday Expectations for 2020

Which destination/s are you contemplating visiting in 2020?
Top 10 holiday destinations

■ Milan
■ Rome



Over 1.8 m Italian overnight stays

Around 563,000 Italians have been eyeing Denmark in 2020, which corresponds to approximately 7% of the population in Rome and Milan. This has been demonstrated by our Image and Potential Analysis conducted during spring 2020 (prior to COVID-19). Considering the average length of stay this represents more than 1.8 m overnight stays.

The Italians mostly plan to visit other southern European countries, such as Spain, Greece and France, but UK, US and Germany are also high on their list of destinations.

Source: VisitDenmark's Image and Potential Analysis 2020. N= 1,015 in Milan and N= 1,052 in Rome.

Milan: Denmark's Potential in Terms of Business

- prior to the Outbreak of the COVID-19 Pandemic



Coastal holiday with children

24%

of the Italian population in Milan would like a coastal or rural holiday with children

Percentage:

15%
Denmark

28%
Italy



Coastal holiday without children

35%

of the Italian population in Milan would like a coastal or rural holiday without children

Percentage:

6%
Denmark

35%
Italy



City break without children

24%

of the Italian population in Milan would like a city break without children

Percentage:

24%
Copenhagen

2%
Aarhus

Rome: Denmark's Potential in Terms of Business

- prior to the Outbreak of the COVID-19 Pandemic



Coastal holiday with children

22%

of the Italian population in Rome would like a coastal or rural holiday with children

Percentage:

9%
Denmark

22%
Italy



Coastal holiday without children

25%

of the Italian population in Rome would like a coastal or rural holiday without children

Percentage:

7%
Denmark

27%
Italy



City break without children

33%

of the Italian population in Rome would like a city break without children

Percentage:

23%
Copenhagen

1%
Aarhus



Knowledge Centre on Tourism in Denmark

www.visitdenmark.dk/corporate/videncenter

Photo: Nicolai Perjesi