Market and Trade Profile: Denmark

July 2021

Destination Bristol ©Gary Newman

Overview

- **'Chapter 1: Inbound market statistics'** provides insights on key statistics about Danish travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **'Chapter 2: Experiences and perceptions'** features details about what visitors from Denmark are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by the Danish in general are also highlighted.
- **'Chapter 3: Understanding the market'** takes a close look at consumer trends in Denmark, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach Danish consumers are indicated, too.
- **'Chapter 4: Access and travel trade'** shows how people from Denmark travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the Danish travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

Please note that most of this report refers to the market conditions for travel from Denmark to the UK prior to the COVID-19 pandemic and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available here: visitbritain.org/inbound-covid-19-sentiment-tracker.

Contents

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Executive Summary

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1: Inbound market statistics

Chapter summary

- Despite the shorter term impact from the COVID-19 pandemic, the Danish outbound market is forecasted to account for more than 18 million trips abroad with at least one overnight stay by 2030. In 2019, the UK was the fifth most popular destination behind Sweden, Germany, Spain and Italy for such trips, ahead of Norway and France.
- The Danish rank globally in 33rd place for international tourism expenditure with US$10.1bn spent on outbound travel in 2019.
- Denmark is the UK's 17th largest source market in terms of volume of visits. In terms of visitor spending it ranks 25th (2019).
- The Danish market provides good seasonal spread with the highest share of visits occurring between October-December in 2019.
- London is the leading destination for a trip to the UK but the South East and Scotland are also popular based on the nights spent in the UK in 2017-2019.
- In 2019, 64% of spending came courtesy of holiday visitors and visits to friends and/or relatives; business visitors contributed 29%. On average, visitors residing in Denmark spent £476 per visit in the UK; on holiday this rises to £537 per visit.

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO, VisitBritain/IPSOS 2016
Please note that market-level inbound statistics have not been produced for full-year 2020; see p. 10 for more.

2019:
£329 million spent by Danes on visits across the UK

2: Experiences and perceptions

Chapter summary

- More than half of Danish visits to the UK feature dining in restaurants; more than two in five enjoy going to a pub. Over half of Danish visits involve shopping.
- The number one pastime for the Danish on holiday in the UK is sightseeing (64%) and half allow time for visiting parks and gardens. Around two-in-five allow time for visiting museums, castles or historic houses.
- A third of Danes on holidays in the UK like to socialise with locals and more than a quarter go on a guided tour.
- Danes on holiday in the UK over-index for enjoying the performing arts, i.e. theatre, musical, opera or ballet on their holiday her.
- More than 39,000 Danish visits involved watching football live.
- While cultural attractions are, by far, the biggest draw for Danish holiday visitors, about a third of Danish holiday visitors are motivated by the ease of access to Britain and getting around while here on holiday as well as vibrant cities, a higher share than in the all-market average.
- 97% of Danish visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.

Source: International Passenger Survey by ONS, VisitBritain/Ipsos 2016

Cultural attractions are, by far, the biggest draw for Danish holiday visitors

3: Understanding the market

Chapter summary

- The most influential source for destination choice for Danish visitors are friends, family and colleagues followed by price comparison websites and information from search engines.
- In a normal year, a large proportion of Danish holiday visitors tend to start thinking about their trip early with 37% doing this half a year or more in advance. More than half of Danish holiday visitors booked their trip at least three months in advance, an above-average share compared to all markets. Most recently, bookings were made mainly at short notice due to the pandemic uncertainty.
- The majority of Danish travellers book part or all of their leisure trips online.
- VisitBritain's international recovery sentiment tracking shows 72% of the Danish considered taking an international leisure trip in 2021, showing strong desire to travel. Half of Danes had either not given much thought to planning their next leisure trip abroad, or had started thinking about it but not yet decided where to go, showing a considerable opportunity to influence destination choice and bookings (status spring 2021). Visit Denmark's research carried out in Denmark in mid-April to early May 2021 further confirms the growing appetite among Danes for a foreign holiday.

Source: VisitBritain/IPSOS 2016, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021; Visit Denmark Danskernes Ferieplaner published June 2021

British culture and Easy access from Denmark: The most important draws for Danish holiday visitors

4: Access and travel trade

Chapter summary

- Access to Britain is easy. 96% of Danish visits arrive by plane.
- Annual seat capacity grew to around 2.3 million seats in 2019, before it declined sharply by 68% in 2020 as a result of the COVID-19 pandemic.
- Most flights come through the Copenhagen – London corridor.
- Ryanair and SAS each operate about a quarter of seat capacity between Denmark and the UK, followed by a fifth by British Airways. Norwegian operated 16% and easyJet 14% in 2019 prior to the pandemic.
- The travel industry in Denmark is made up of charter operators, business travel and MICE operators, online operators and retail travel agents. Copenhagen is the hub for most of them; some are spread across the country, but distances are short.
- The planning cycle varies, so it is possible to do business in Denmark throughout the year.
- Some operators are pan-Nordic as well, so it is possible to reach the whole region via a single contact.

Source: Apex, International Passenger Survey by ONS

96% of visits from Denmark to the UK come by plane.

Inbound market statistics

Chapter 1

1.1 Key statistics

Key insights

- Denmark is the UK's 17th largest source market in terms of visits, and 25th most valuable for visitor spending (2019).
- In 2019, the UK was the 5th most popular destination of Danish outbound overnight travel globally behind Sweden, Germany, Spain and Italy, ahead of Norway and France.
- In 2019, the UK welcomed almost 691,000 visits from Denmark contributing £329 million in visitor spending across the UK. On average, visitors residing in Denmark spent £476 per visit in the UK; amongst those on holiday, £537 per visit.
- The Danish market provides a good seasonal spread with the highest share of visits occurring between October-December in 2019.
- London is the leading destination for a trip to the UK but the South East and Scotland are also popular based on the nights spent in the UK in 2017-2019.
- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Danish visitors. In 2019 visits lasting 1-3 nights set records for both visits and spend.
- 15% of Danish visits were bought as part of a package or an all-inclusive tour, slightly above the all-market average but most Danish visits to the UK remain independently organised.

Denmark is the UK's 17th largest source market by volume of visits. (2019)

Source: International Passenger Survey by ONS, Oxford Economics; Please note that market-level inbound statistics have not been produced by the ONS for full-year 2020 as the IPS was suspended from mid-March; latest full-year inbound data is for 2019.
More information is available here: https://www.visitbritain.org/2020-inbound-data

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	10.1
Global rank for international tourism expenditure	33
Number of outbound overnight visits (m)	11.9
Most visited destination	Sweden

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+23%	+1%	+20%
2009	562	2,643	275
2010	508	2,714	299
2011	561	2,581	263
2012	593	2,639	283
2013	621	2,769	389
2014	611	2,438	273
2015	699	3,190	330
2016	680	3,420	342
2017	677	2,815	333
2018	614	2,596	321
2019	691	2,676	329
Share of UK total in 2019	**1.7%**	**0.9%**	**1.2%**

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	691	+13%	17
Nights (000s)	2,676	+3%	31
Spend (£m)	329	+3%	25

Between January and March 2020, the UK welcomed 71,000 visits from Denmark (down 40% on the first quarter of 2019), worth £37 million (down 26% on the first quarter of 2019).* The COVID-19 pandemic already impacted visitation from Denmark to the UK in the first quarter of 2020 as both Denmark and the UK introduced restrictions to counter the spread of COVID-19 in spring 2020.

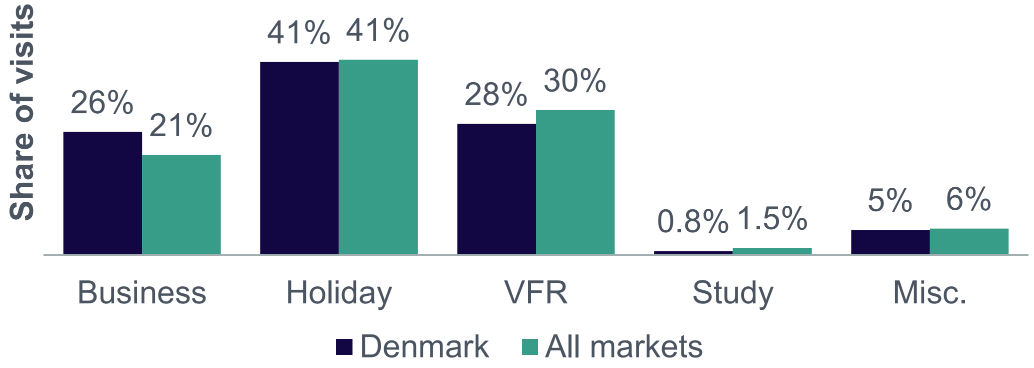
Source: International Passenger Survey by ONS, *provisional data for January-March 2020, latest statistics at time of writing

Key metrics by journey purpose

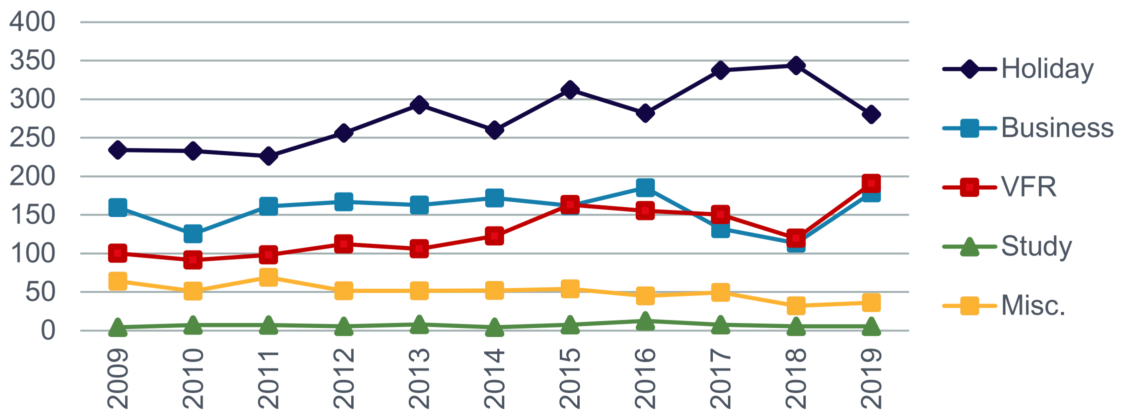
Averages by journey purpose in 2019	Nights per visit	Spend per night	Spend per visit
Holiday	4	£136	£537
Business	2	£264	£527
Visiting Friends/ Relatives	5	£60	£322
All visits	4	£123	£476

1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trends (visits 000s)



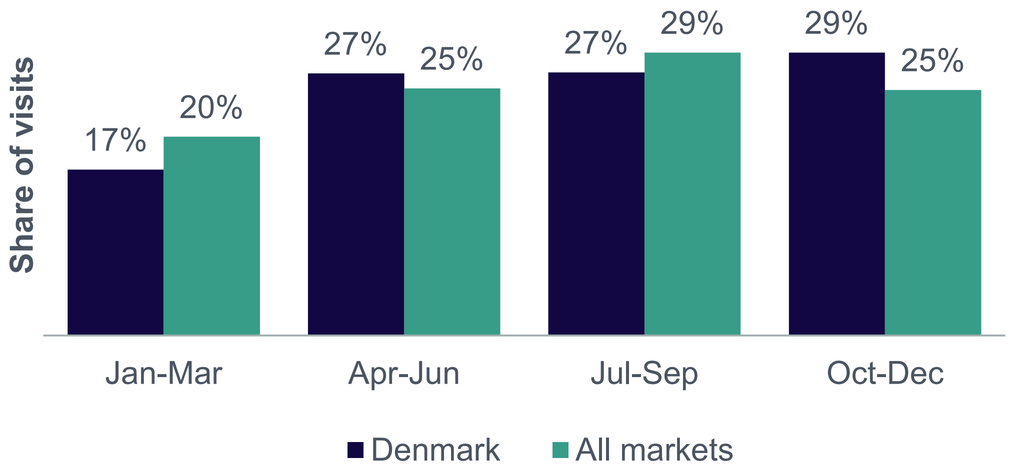
- The highest volume of Danish visits to the UK is generated by leisure visits in 2019: 280,000 Danish visits to the UK were made for holidays in 2019, worth a total of £150 million in visitor spending. The UK also welcomed a record 190,000 Danish visits to friends/relatives residing here (up 59% on a weak 2018), worth a record total of £61 million (up 77% year-on-year).
- In 2019, 64% of spending came courtesy of holiday visitors and visits to friends and/or relatives; business visitors contributed 29%. On average, visitors residing in Denmark spent £476 per visit in the UK; on holiday this rises to £537 per visit.

- Danish holiday visits had set a volume record in 2018 following steady increases in the two previous years but could not match this performance in 2019. They closed overall 18% lower than in 2018 in 2019.
- 179,000 Danish visits to the UK were made for business purposes (up 58% on 2018 and not far off the 2016 volume record of 185,000 such visits) worth a total of £94 million (up 56% on 2018).
- Both miscellaneous and study visits make up a very small share of visits from Denmark to the UK.

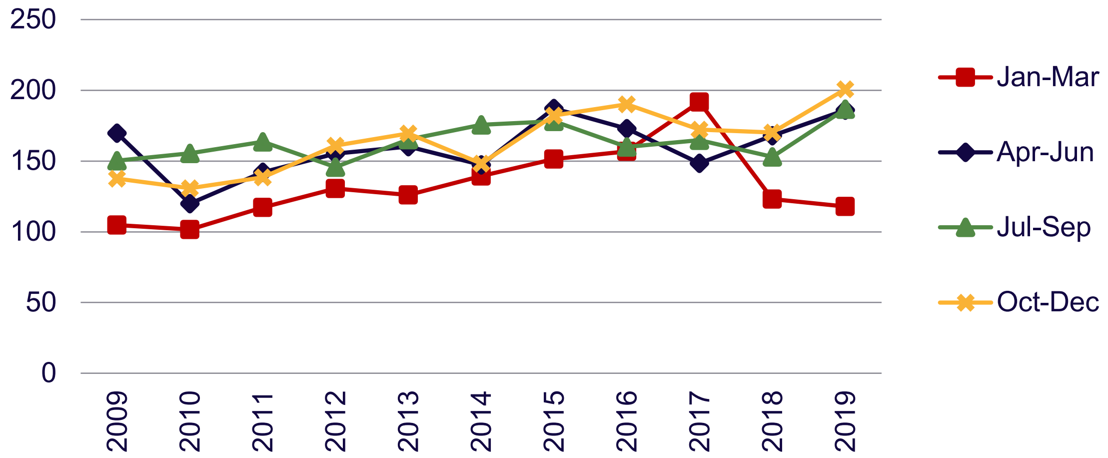
Source: International Passenger Survey by ONS

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)

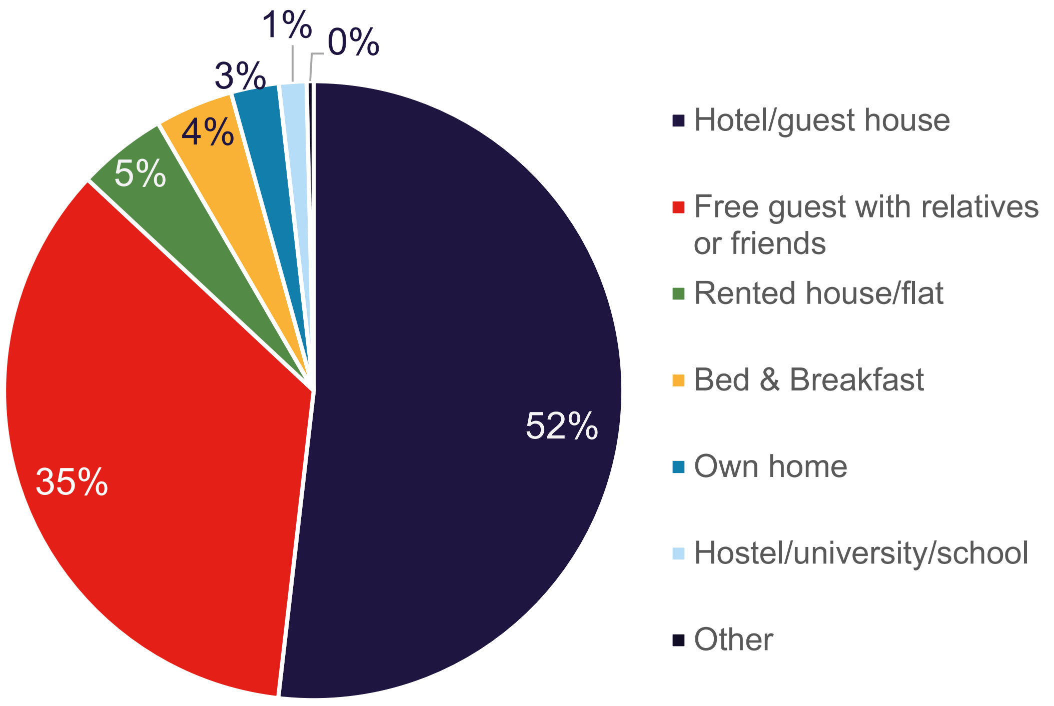


- Visits from Denmark to the UK have good seasonal spread throughout the year. Almost three in ten of Danish visits to the UK in 2019 were made in the October-December period, closely followed by 27% in the spring months from April-June and the same proportion in the July-September period. 17% of Danish visits came to the UK in the first three months of 2019.
- The last quarter of 2019 saw a record 201,000 Danish visits in the UK with a visitor spend of £102 million between October and December 2019 (just 4% behind the record in 2016). The summer quarter also saw unprecedented visit volumes with 187,000 visits, while the volume of visits made between January-March has declined between 2017 and 2019. The period between April and June is also popular; most recently it saw 186,000 visits in 2019, just 1% short of the 2015 volume record and Danish visitors who visited during this period set a new visitor spend record at £96 million.

Source: International Passenger Survey by ONS

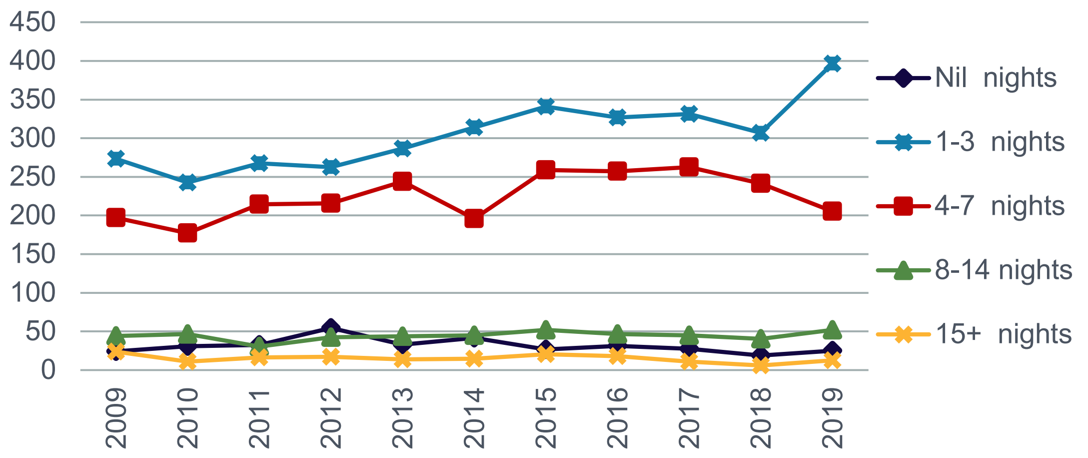
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Note: please read pie chart clockwise

Duration of stay trend (visits 000s)

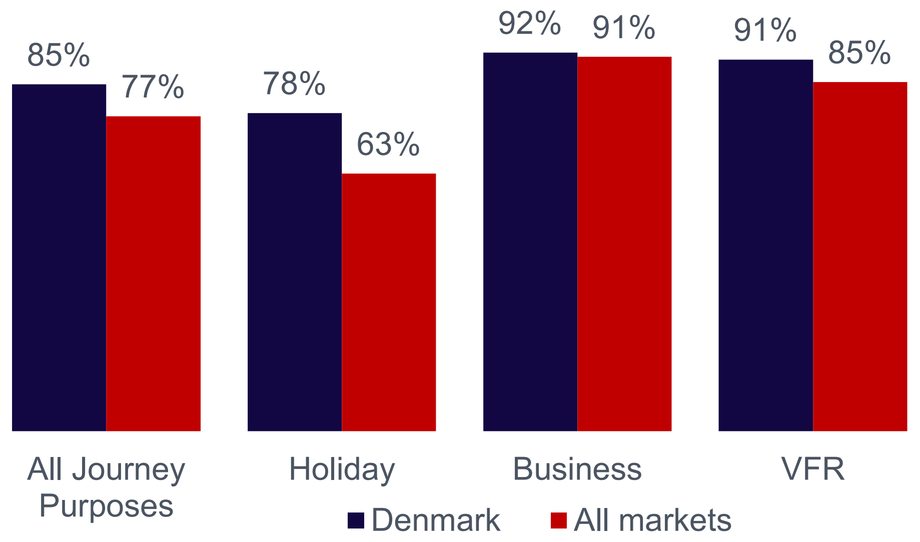


- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Danish visitors. Danish visits to the UK staying 1-3 nights set a new record for visits and spending in 2019 with 396,000 visits worth a total of £164 million.
- Two forms of accommodation dominate the picture with just over half of Danish visitor nights spent at a 'hotel/guest house' and more than a third spent as a 'free guest with relatives of friends'. Just over one in ten Danish visitor nights were spent in other accommodation types in 2019.

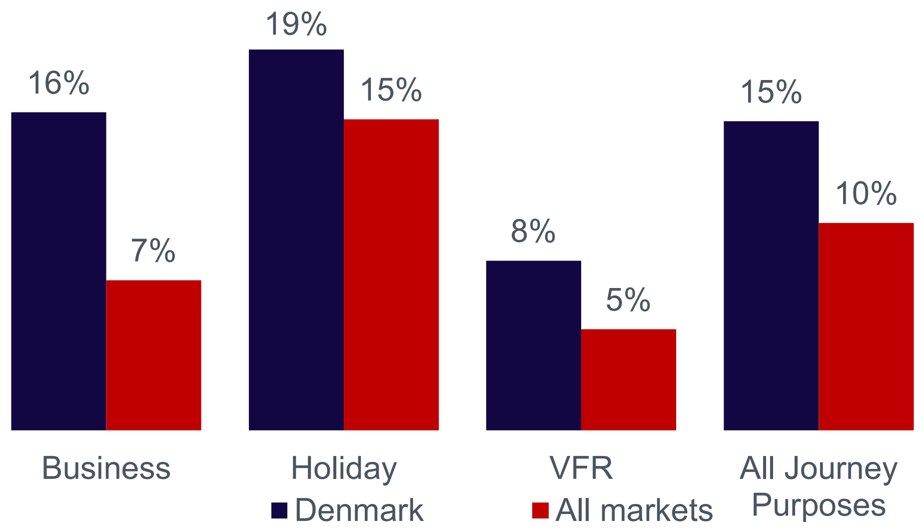
Source: International Passenger Survey by ONS

1.1 Key statistics: repeat visits and package tours

Proportion of overnight visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- 78% of holiday visits from Denmark to the UK in 2015 were made by repeat visitors (excl. UK nationals). These repeat visitors came on average six times (a medium to high average visit frequency compared to other markets) and spent on average £3,140 in the UK in the past ten years.
- The highest proportion of repeat visitors were among those coming for business purposes (92%) or to visit friends and/or relatives who live in the UK (91%). Danish visits have an above-average propensity to be a repeat visit across all journey purposes.
- 15% of visits from Denmark to the UK are bought as a package or all-inclusive tour in 2019, rising to almost one in five holiday visits from Denmark. While this is above the all-market average, most Danish visits to the UK remain independently organised.

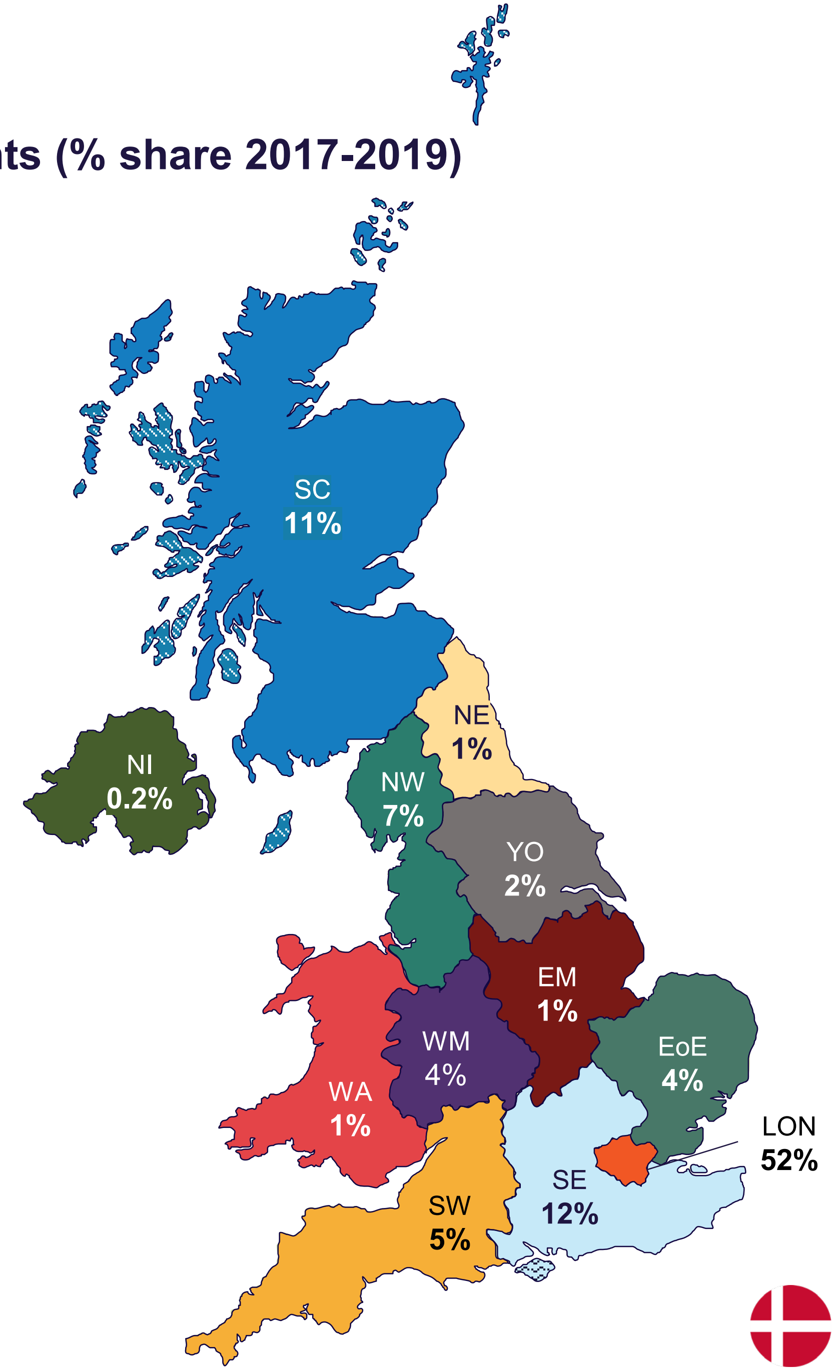
International Passenger Survey by ONS. *2015, excluding British nationals;
**See definition of a package holiday in appendix

1.2 Getting around Britain

Annual visits to the UK (2017-2019 average)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	2,696	661	328
Scotland (SC)	299	62	28
Wales (WA)	30	8	3
Northern Ireland (NI)	5	1	0.2
London (LDN)	1,390	371	200
North East (NE)	21	9	2
North West (NW)	188	57	27
Yorkshire (YO)	58	17	4
West Midlands (WM)	102	26	11
East Midlands (EM)	32	10	3
East of England (EoE)	107	27	7
South West (SW)	134	27	10
South East (SE)	316	77	28
Nil nights (Nil)	N/A	24	3

Nights (% share 2017-2019)



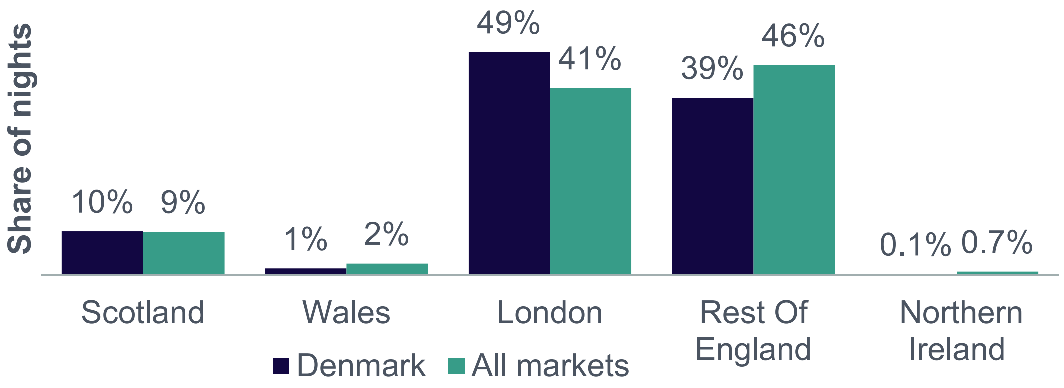
Source: International Passenger Survey by ONS

1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2017-2019 average)

Town	Visits (000s)
London	371
Edinburgh*	50
Manchester*	23
Liverpool*	19

Regional spread 2019

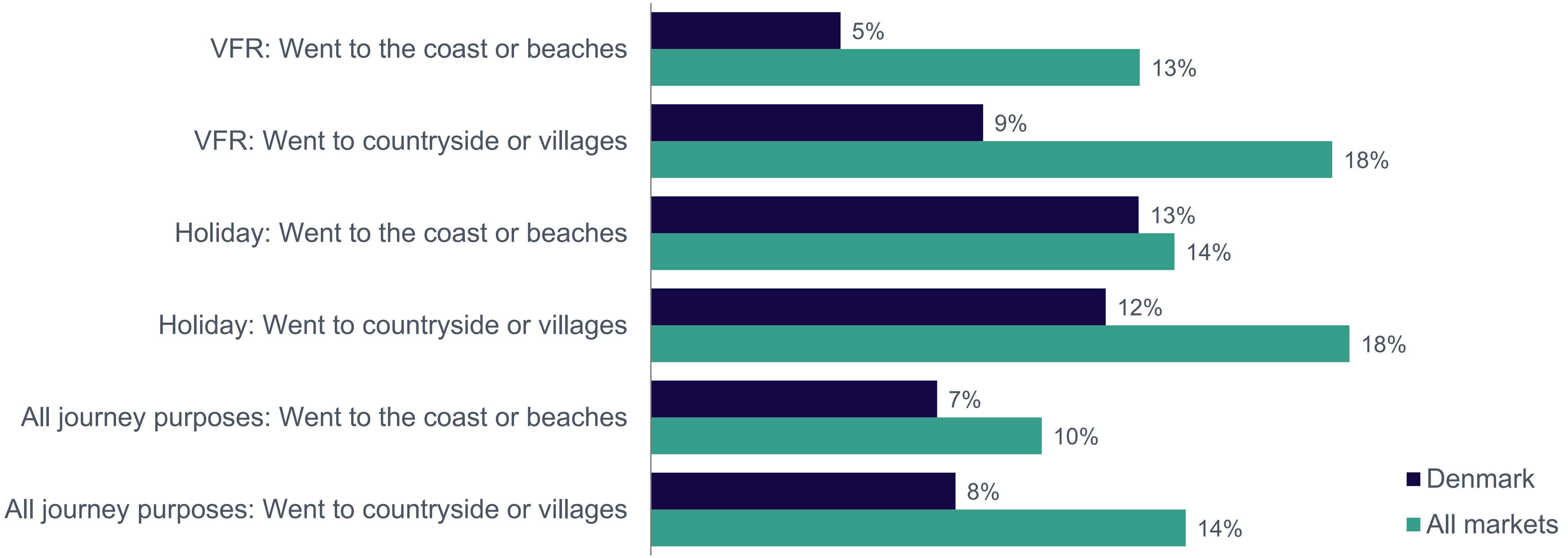


Source: International Passenger Survey by ONS, *small base

- London is the leading destination for a trip to the UK, accounting for more than half of Danish visitor nights (higher than the all-market average), but the South East and Scotland are also popular based on average nights spent in the UK in 2017-2019.
- Edinburgh was the second most popular city destination for visits from Denmark to the UK after London, and ahead of Manchester and Liverpool (based on 2017-2019 average).
- Danish visits have a slightly below average propensity to feature rural and coastal areas of Britain. Holiday visits are most likely to feature activity in such areas.

1.2 Getting around Britain: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

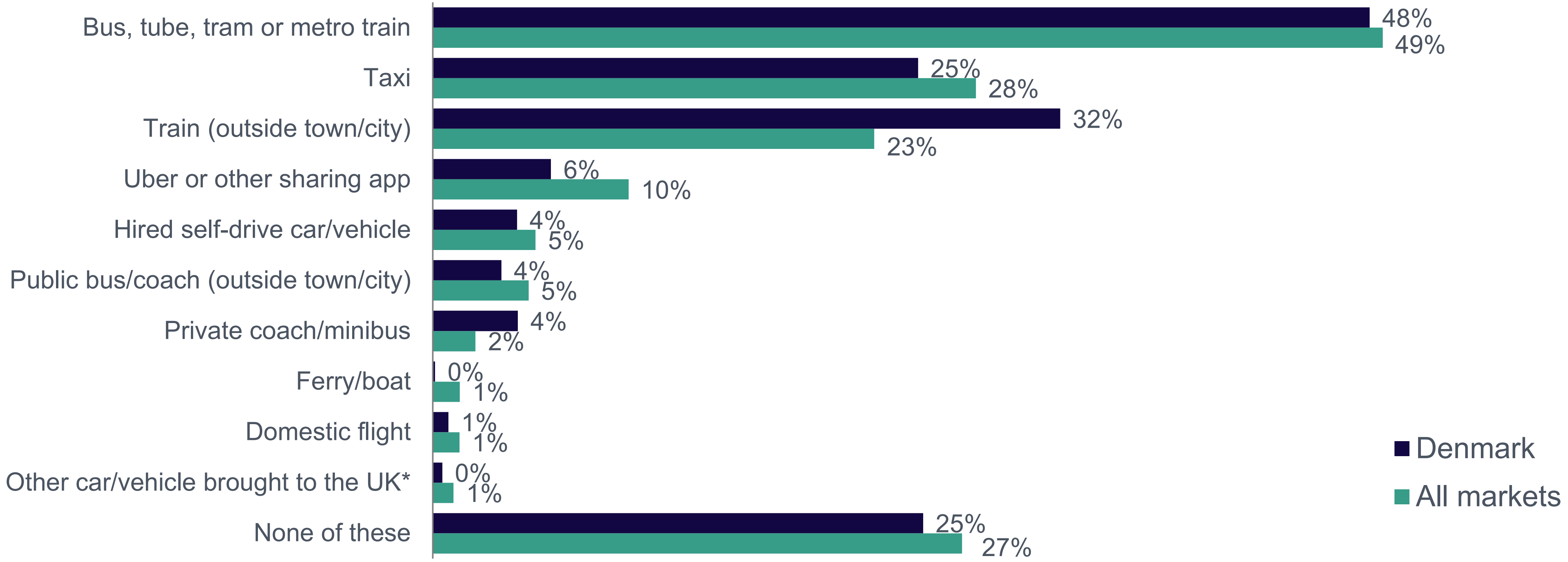


- More than one in ten Danish holiday visits to the UK feature going to the coast or beaches or going to the countryside or villages. In general, Danish visits have a slightly below average propensity to feature rural and coastal areas of the UK.

Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport

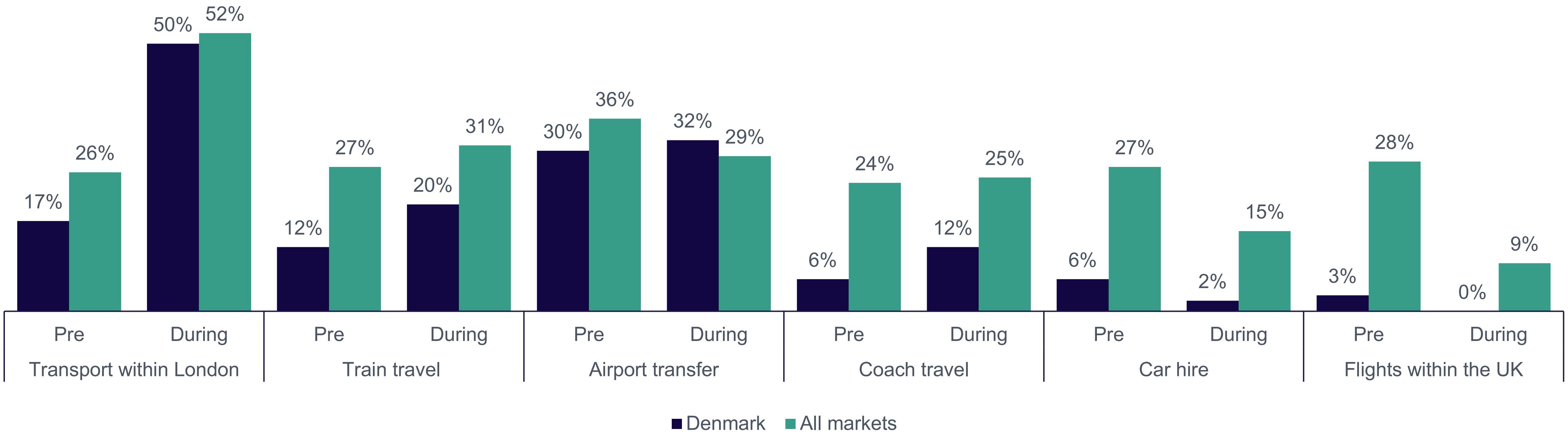


- Around half of the Danish have a propensity to use bus, tube, tram or metro trains during their visit in the UK.
- They have a below average propensity to take other internal modes of transport listed except from trains (32% vs 23%) and private coach/minibus (4% vs 2%).

Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for 'car/vehicle you/group brought to the UK

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



- The majority of Danish visitors buy their transport tickets, whether for transport within London or train tickets, after arriving in Britain rather than booking in advance.
- Around one in three Danish visitors buy airport transfers before their trip and around one in three during their visit.
- Hardly any Danish visitors buy tickets to domestic flights within the UK.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

1.3 Visitor demographics

Visitor characteristics

- The age cohort of 25-54 makes up the largest volume of visits from Denmark to the UK. Visits from Danes aged 25-34 set new records in 2019 with 150,000 visits and visitor spending of £89 million; this age cohort has also seen the strongest growth over a 10 year period comparing 2009 and 2019, followed by those aged 65+ and 55-64. Young visitors between 25 and 34 now also provide the highest average spend per visit of £593, followed by those aged 45-54 with £504 per visit.
- There is a tendency of more men visiting the UK from Denmark than women, especially among business visitors.
- 28% of visits coming to the UK from Denmark to see friends and/or relatives residing in the UK are made by British nationals.
- More than a third of visits from Denmark to the UK are accompanied by a partner or spouse and close to one-in-three are made by travellers on their own. The Danish have a higher propensity to travel with their partner or spouse, adult friends, children or business colleagues than the average visitor in the UK.
- The largest proportion of Danish visitors who came to the UK reside in the Hovedstaden (which includes Copenhagen) and the Midtjylland region (2018).

78%

of Danish holiday visitors have been to the UK before*

Source: International Passenger Survey by ONS, *IPS 2015

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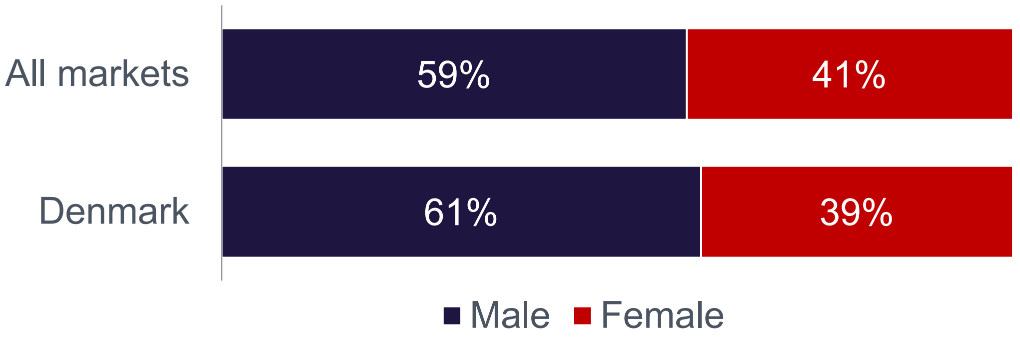
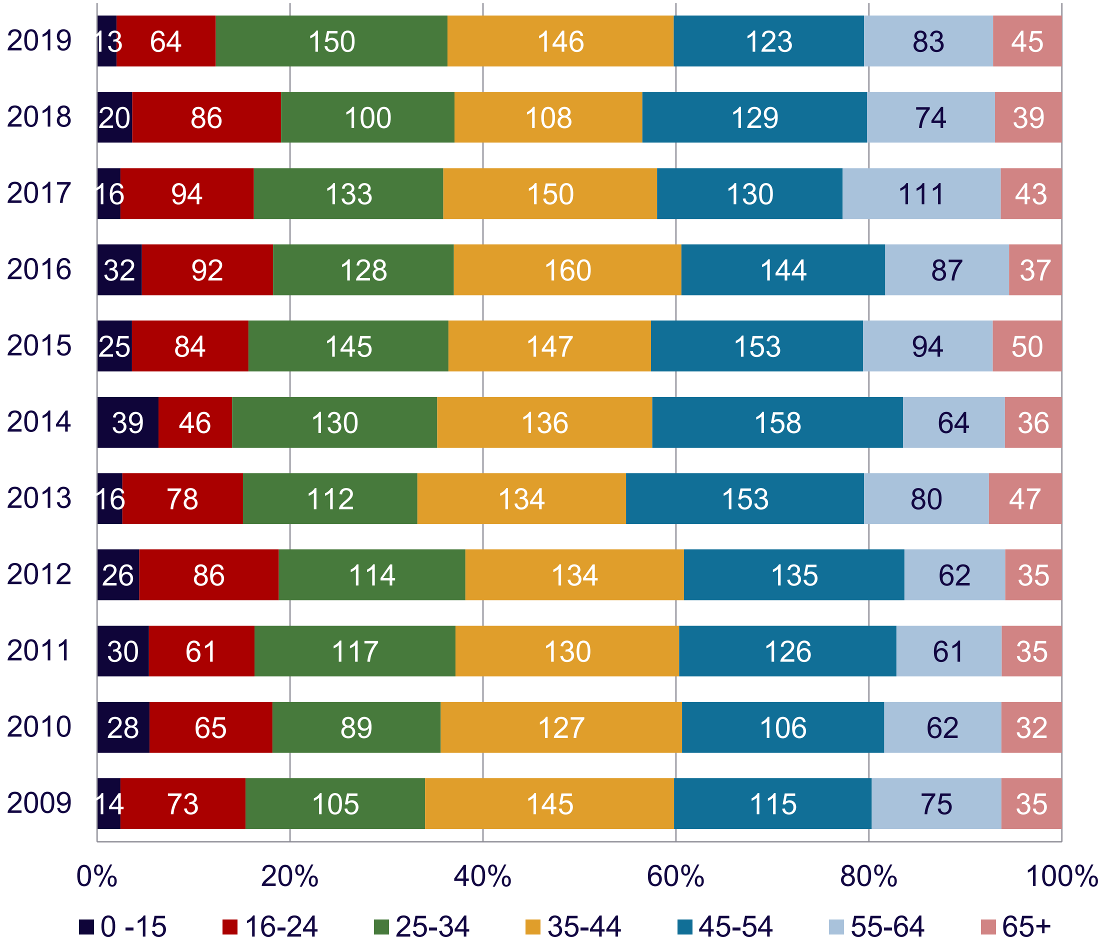
1.3 Visitor demographics: gender and age groups

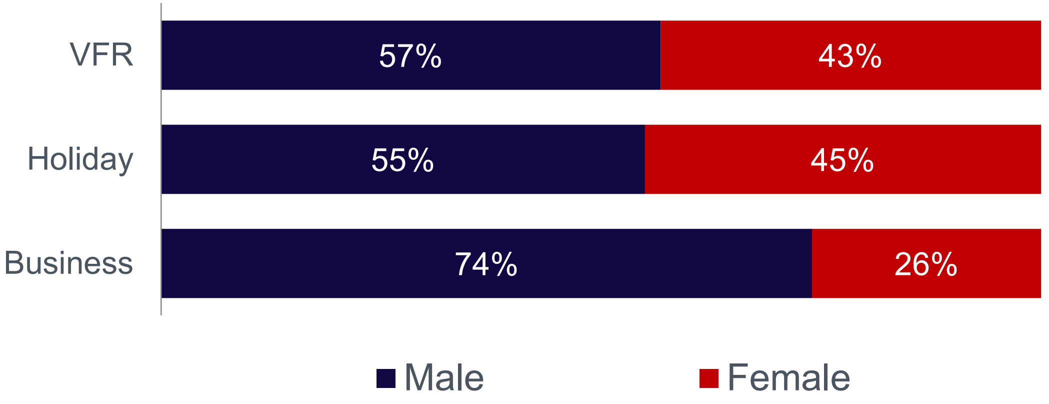
Gender ratio of visits (2019):



Age group trend (visits in 000s)



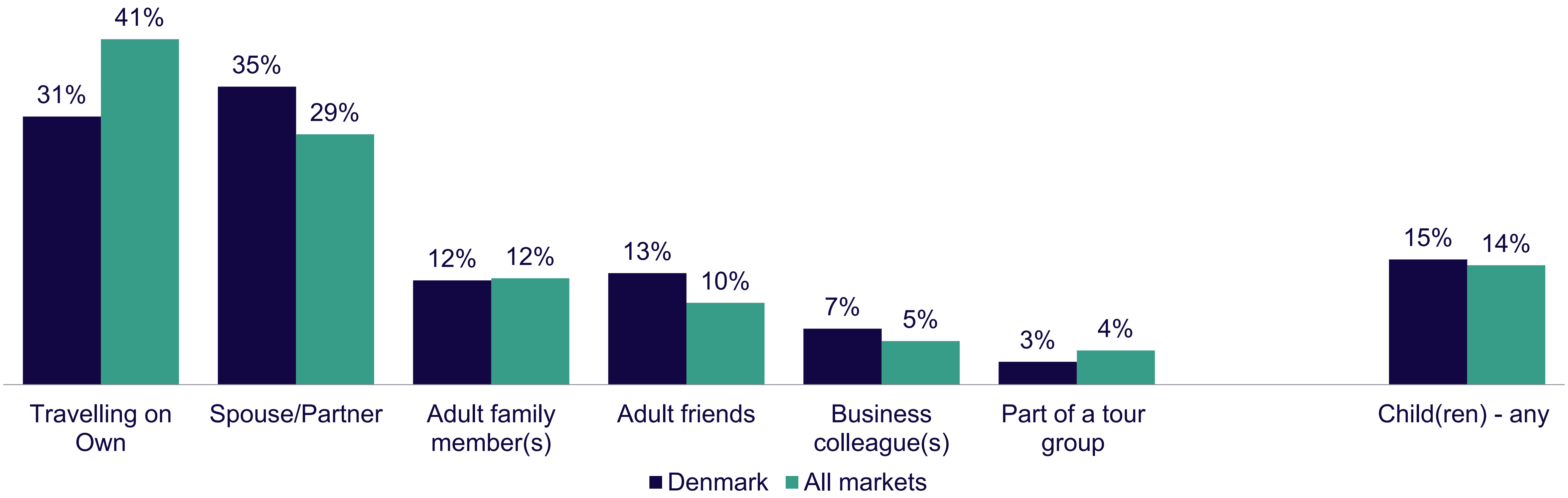
Gender ratio of visits from Denmark by journey purpose (2019):



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have Danish visitors to the UK travelled with?



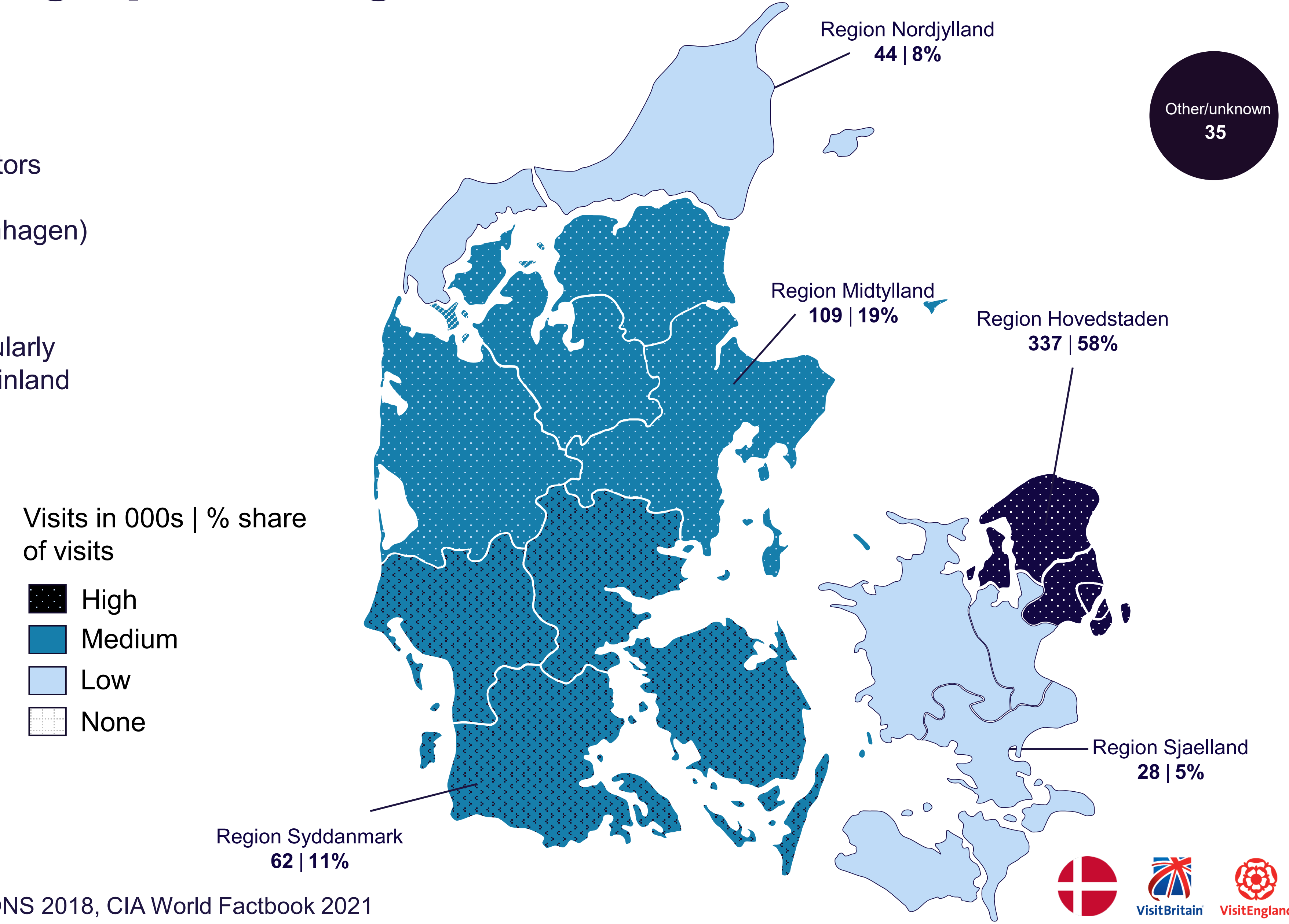
- More than a third of visits from Denmark to the UK are accompanied by a partner or spouse and close to one-in-three are made by travellers on their own.
- The Danish have a higher propensity to travel with their partner/spouse, adult friends, children or business colleagues than the average visitor in the UK.

Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?

1.3 Visitor demographics: origin

Visits to the UK

- The largest proportion of Danish visitors who came to the UK reside in the Hovedstaden (which includes Copenhagen) and the Midtjylland region (2018).
- The areas in Denmark with the most inhabitants are coastal areas, particularly Copenhagen and the East of the mainland (2021).



Source: International Passenger Survey by ONS 2018, CIA World Factbook 2021

1.4 The UK and its competitors (1)

Market size, share and growth potential

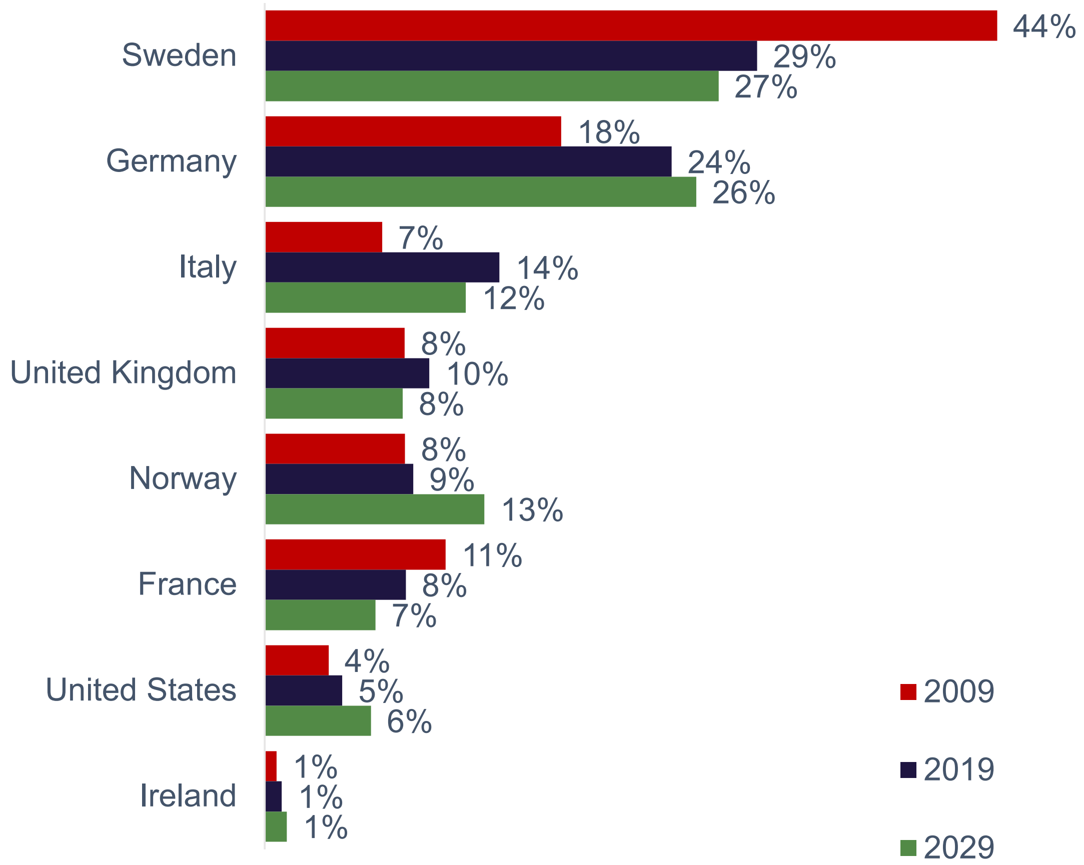
- In 2019, the UK was the 5th most popular destination of Danish outbound overnight travel globally behind Sweden, Germany, Spain and Italy, ahead of Norway.
- In a highly competitive set of destinations, the UK is projected to struggle keeping its market share by 2029, as are Sweden and France. Sweden is projected to lose a large part of its market share out of the set, while Germany, Italy, Norway, and USA are all forecast to increase their share of Danish arrivals, to varying degrees. Ireland's share is expected to remain stable.
- Despite the severe shorter-term impact of the COVID-19 pandemic, visits from the Danish market are forecast to grow by 18% comparing 2019 and 2030, and Danish visitor spending in the UK by 51% in the same timeframe, which would see the value of the Danish market reach almost £500 million by 2030.
- More than four in five Danes who go on a short holiday chose a destination within Denmark in 2019, prior to the pandemic. When it comes to longer holidays, three in five holiday trips had a destination abroad with Spain, Germany and Italy most popular in the same year.

The UK ranks
5th
for Danish outbound
overnight visits

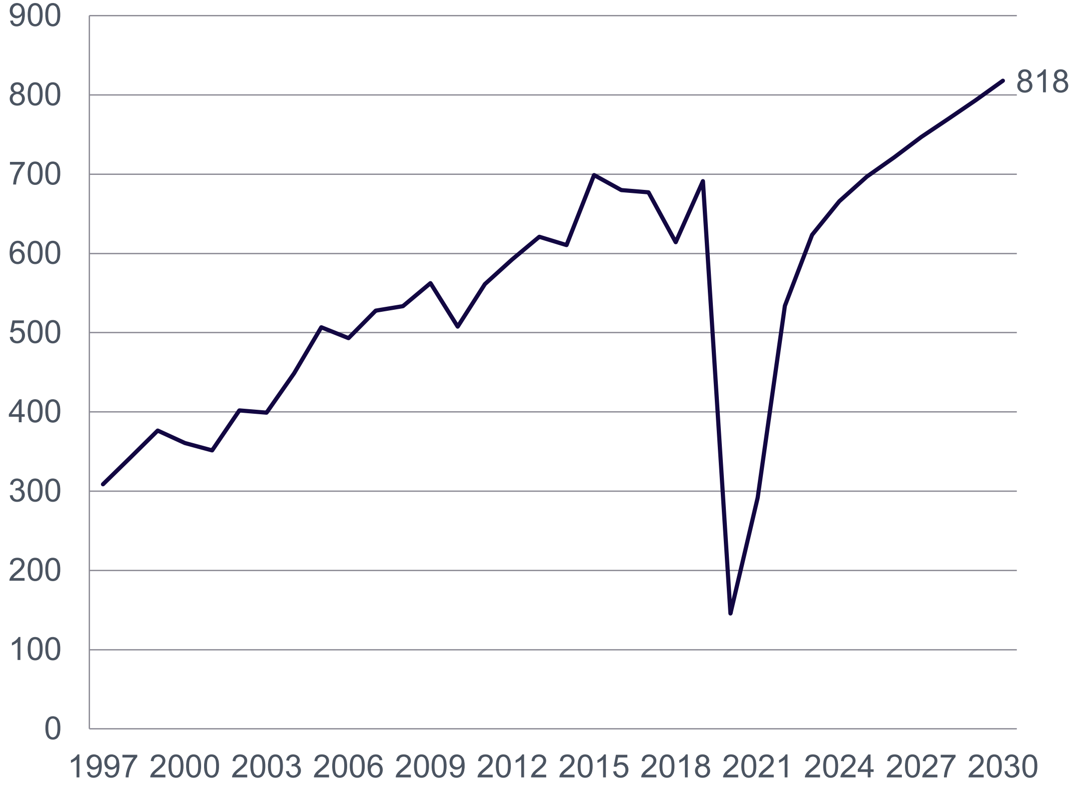
Source: Danmarks Statistik 2020; Oxford Economics, VisitBritain/IPSOS 2016, Oxford Economics forecasts with VisitBritain adaptations
Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

1.4 The UK and its competitors (2)

The UK's market share of Danish visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

Experiences and perceptions

Chapter 2

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2.1 Inbound activities: summary

- More than half of Danish visits to the UK feature dining in restaurants; more than two in five enjoy going to a pub. Over half of Danish visits involve shopping.
- 64% of Danish holiday visits involve sightseeing followed by half visiting parks and gardens. More than two-in-five on holiday in the UK allow time for visiting museums, castles or historic houses, followed by more than a quarter who visit religious buildings.
- A third of Danes on holidays in the UK like to socialise with locals and 27% go on a guided tour.
- One-in-five enjoyed the performing arts, i.e. theatre, musical, opera or ballet on their holiday here, a higher share than the all-market average.
- More than 39,000 Danish visits involved watching football live.
- 97% of Danish visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.

Top 10 activities for Danish visitors during their visit to the UK

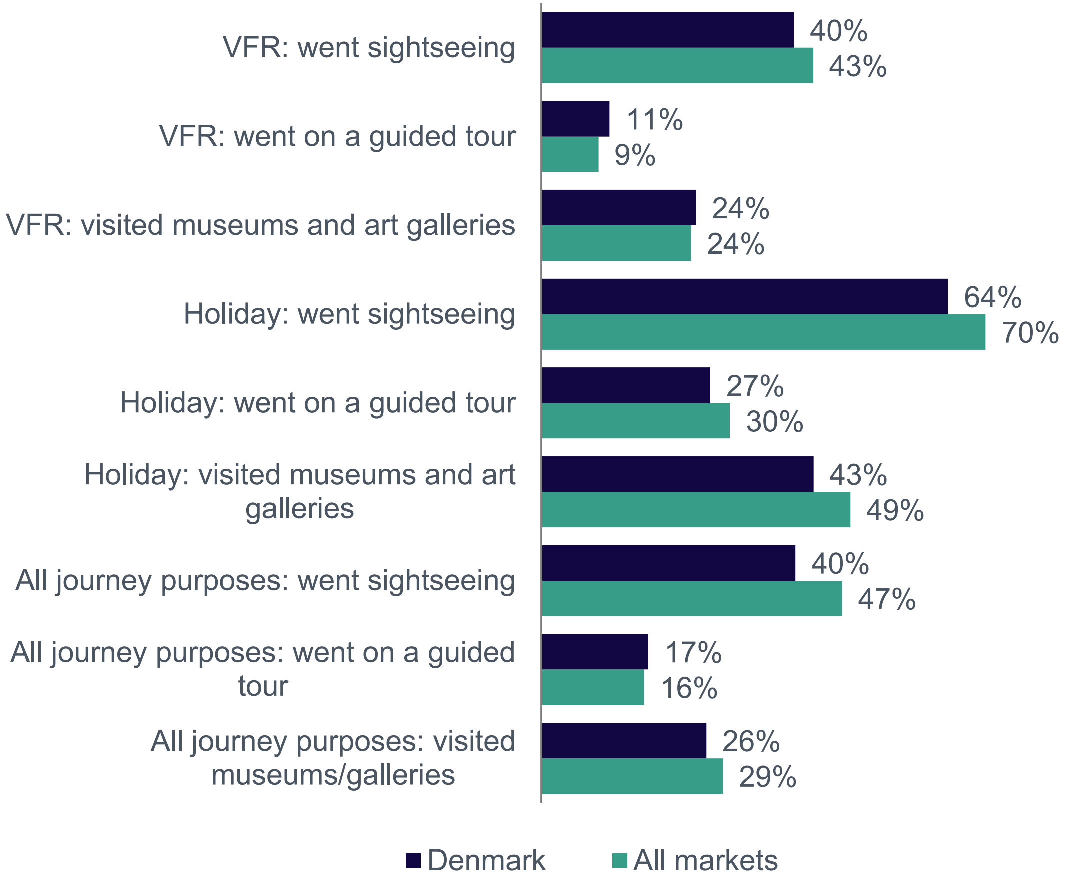
1. Dining in restaurants
2. Going shopping
3. Going to the pub
4. Sightseeing famous monuments/ buildings
5. Visiting parks or gardens
6. Socialising with locals
7. Visiting museums or art galleries
8. Visiting castles or historic houses
9. Going on a guided tour
10. Visiting religious buildings

For more information on activities, please visit our webpage of activities undertaken in Britain

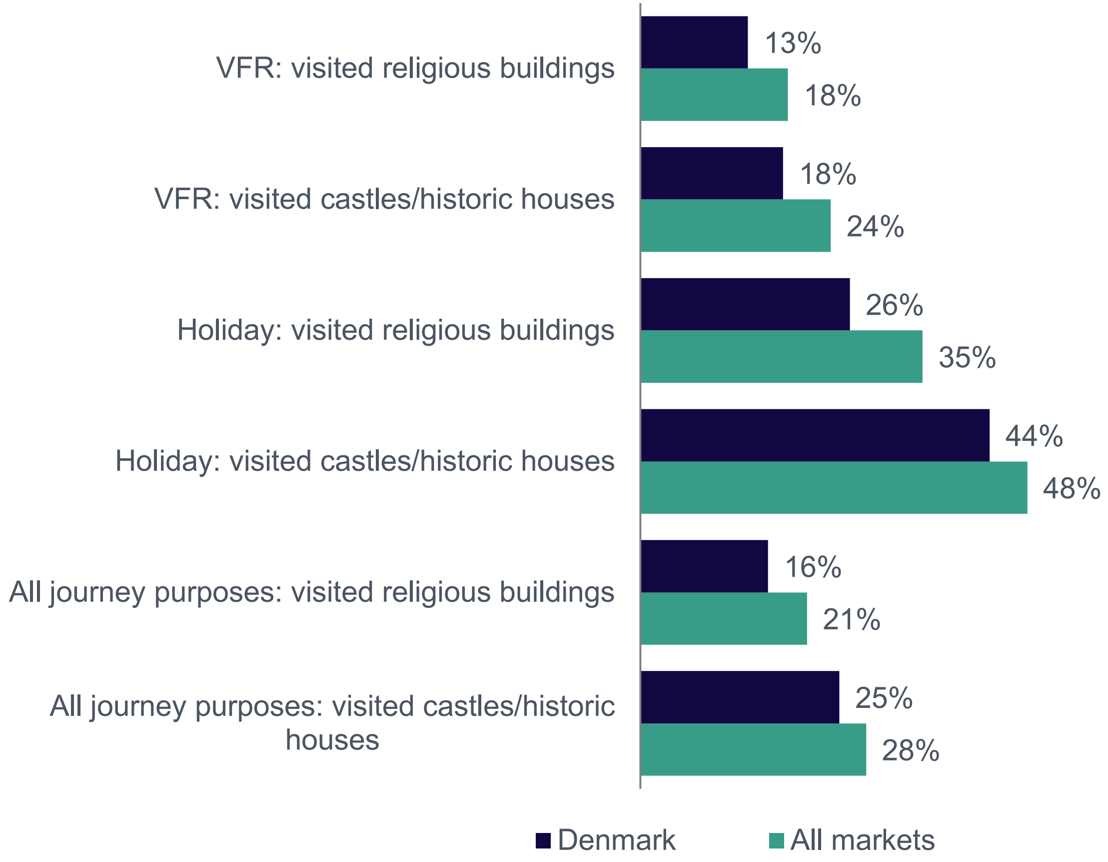
Source: International Passenger Survey by ONS, rankings based on 2007-2019 data

2.1 Inbound activities: tourism and heritage

Propensity to go sightseeing, visit museums and galleries or to go on a guided tour



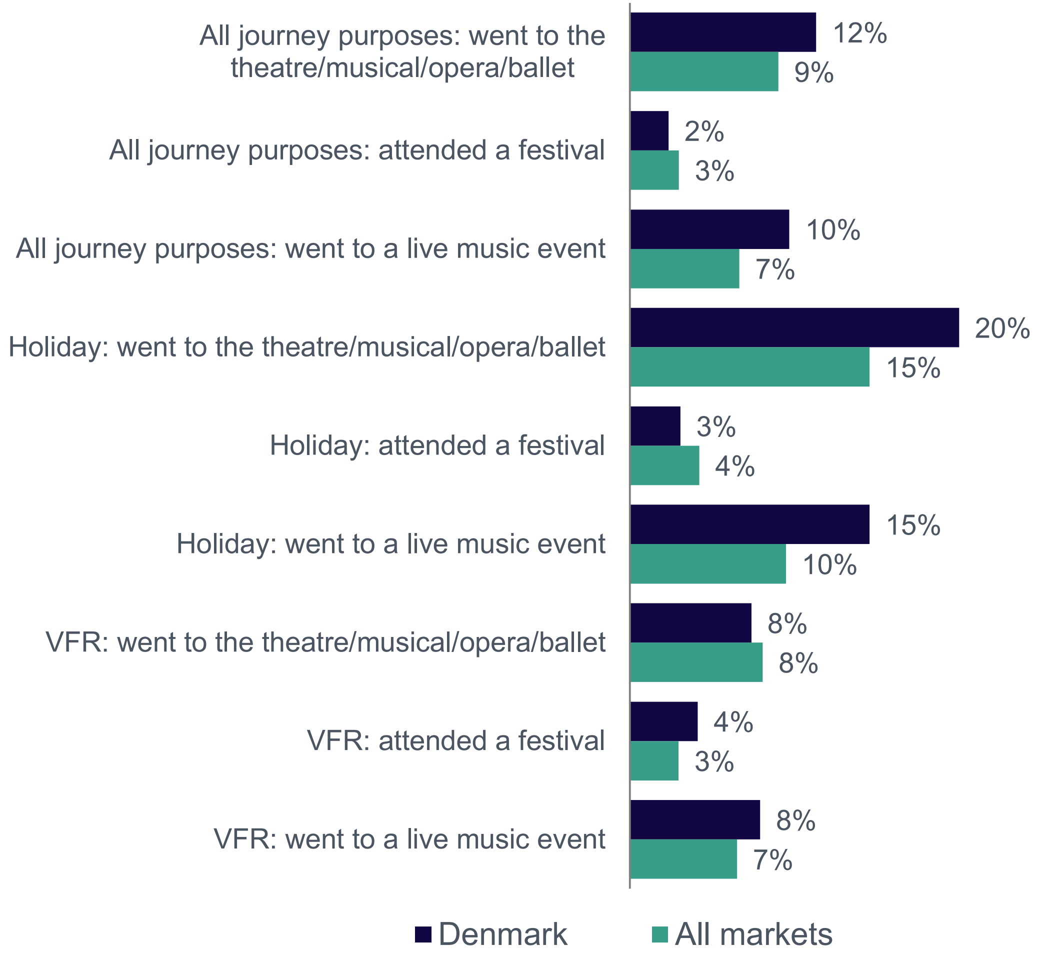
Propensity to visit built heritage sites



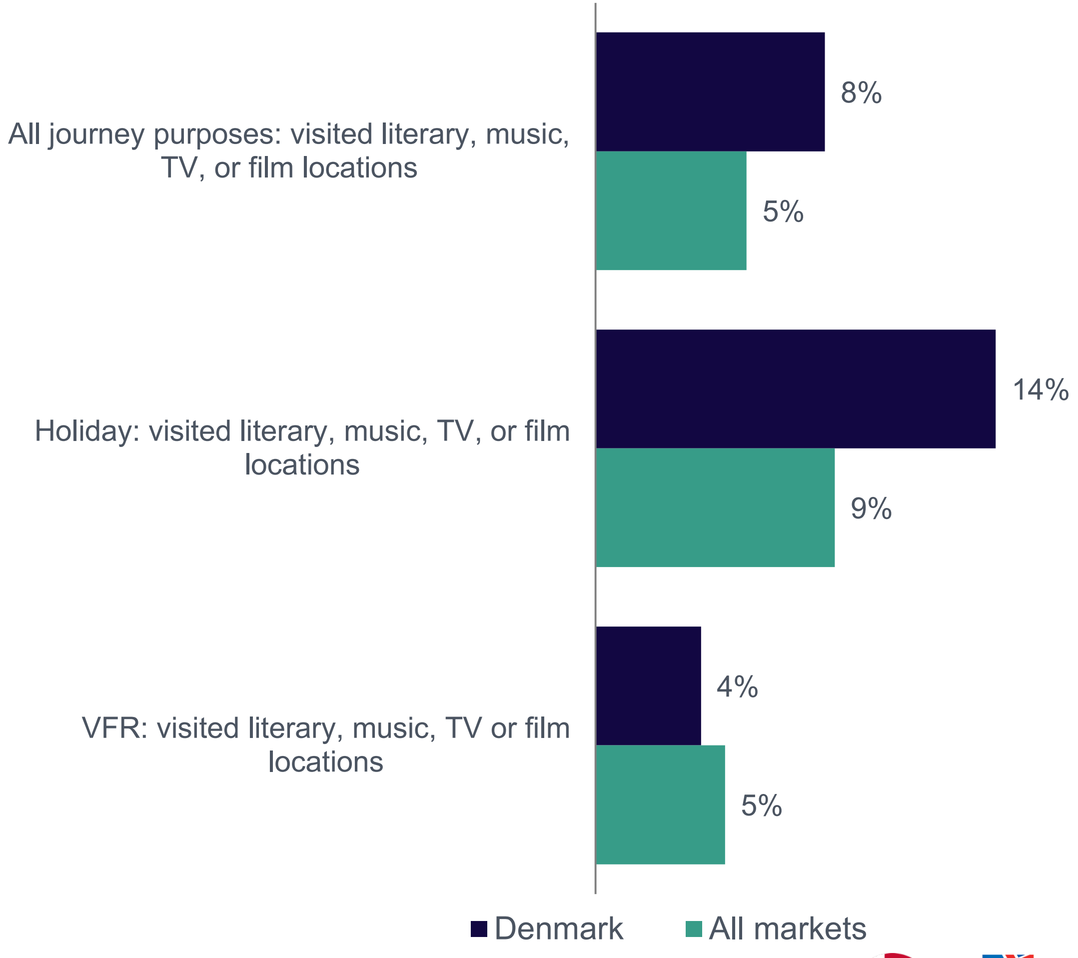
Source: International Passenger Survey by ONS, 2016

2.1 Inbound activities: culture

Propensity to attend the performing arts



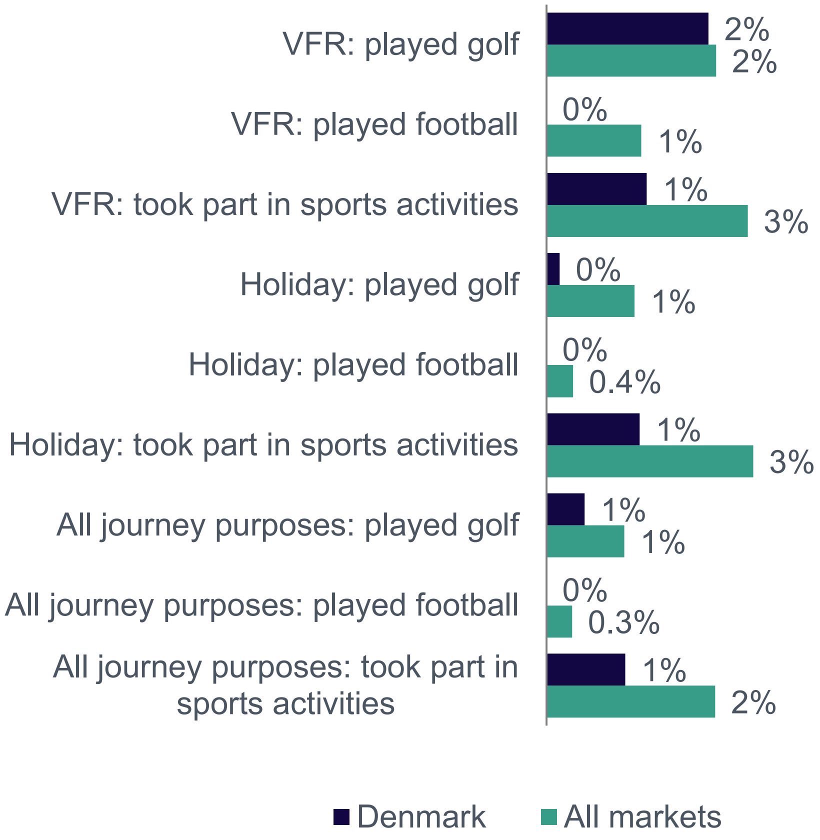
Propensity to visit literary, music, TV, or film locations



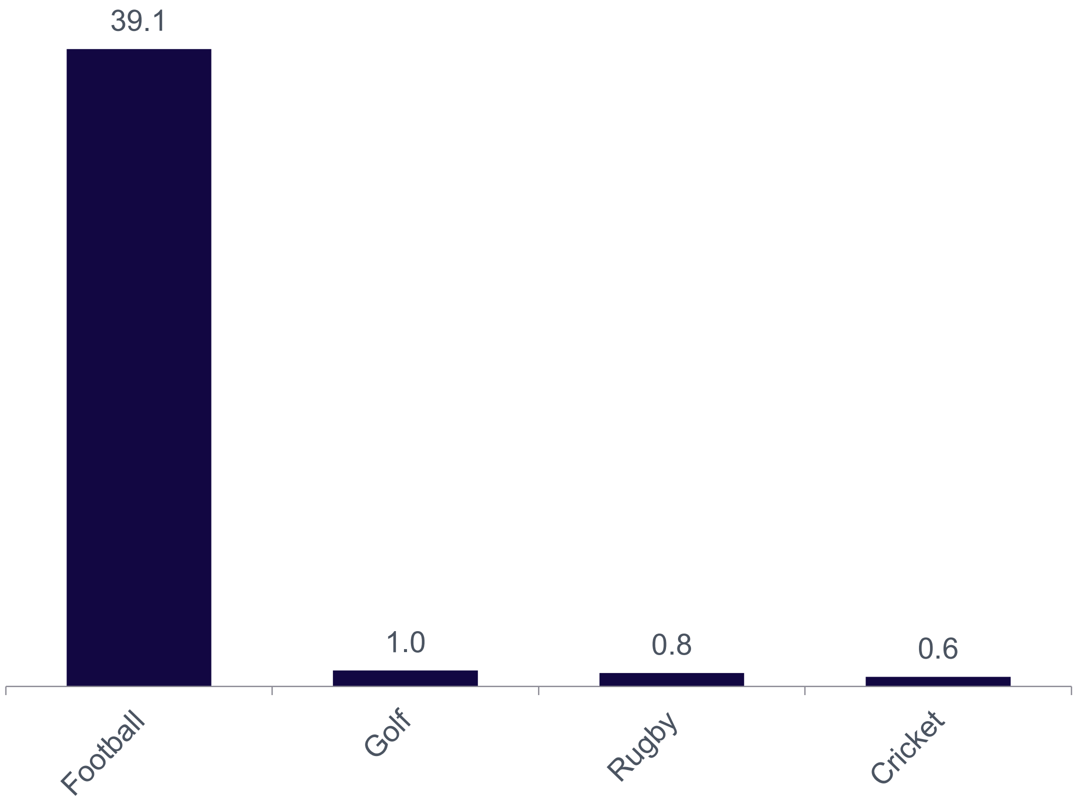
Source: International Passenger Survey by ONS, 2016 (performing arts)

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



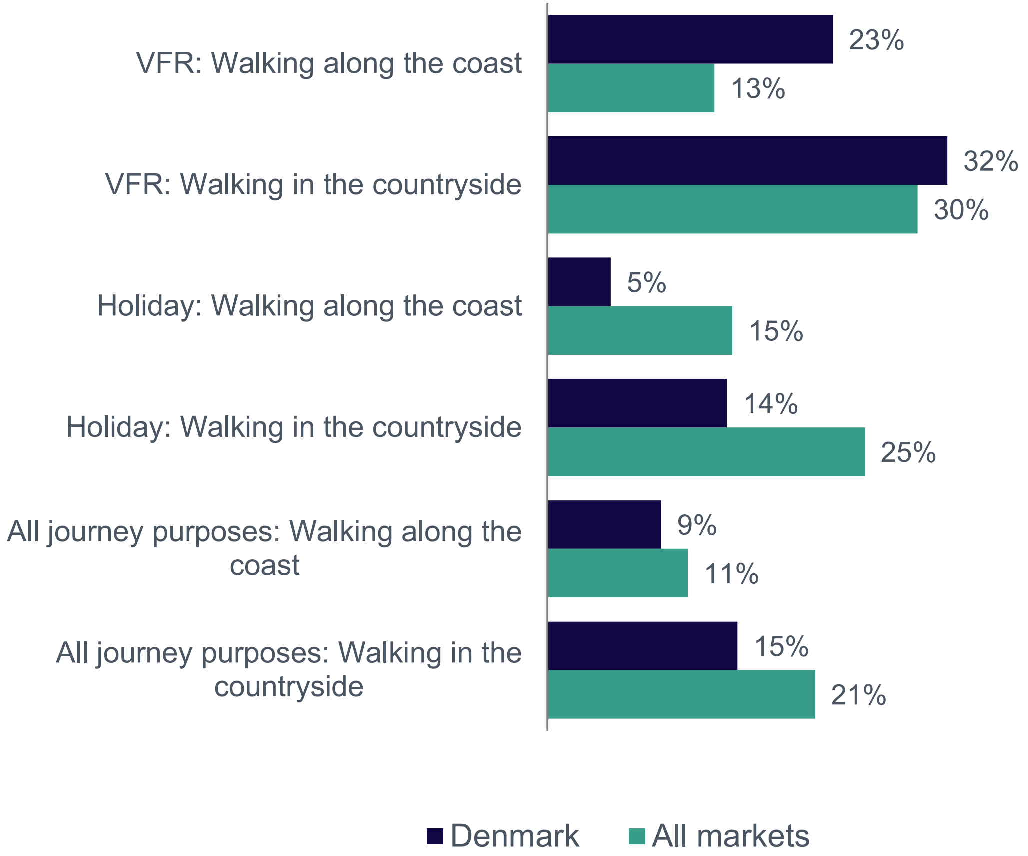
Number who watched sports live during trip (000s)



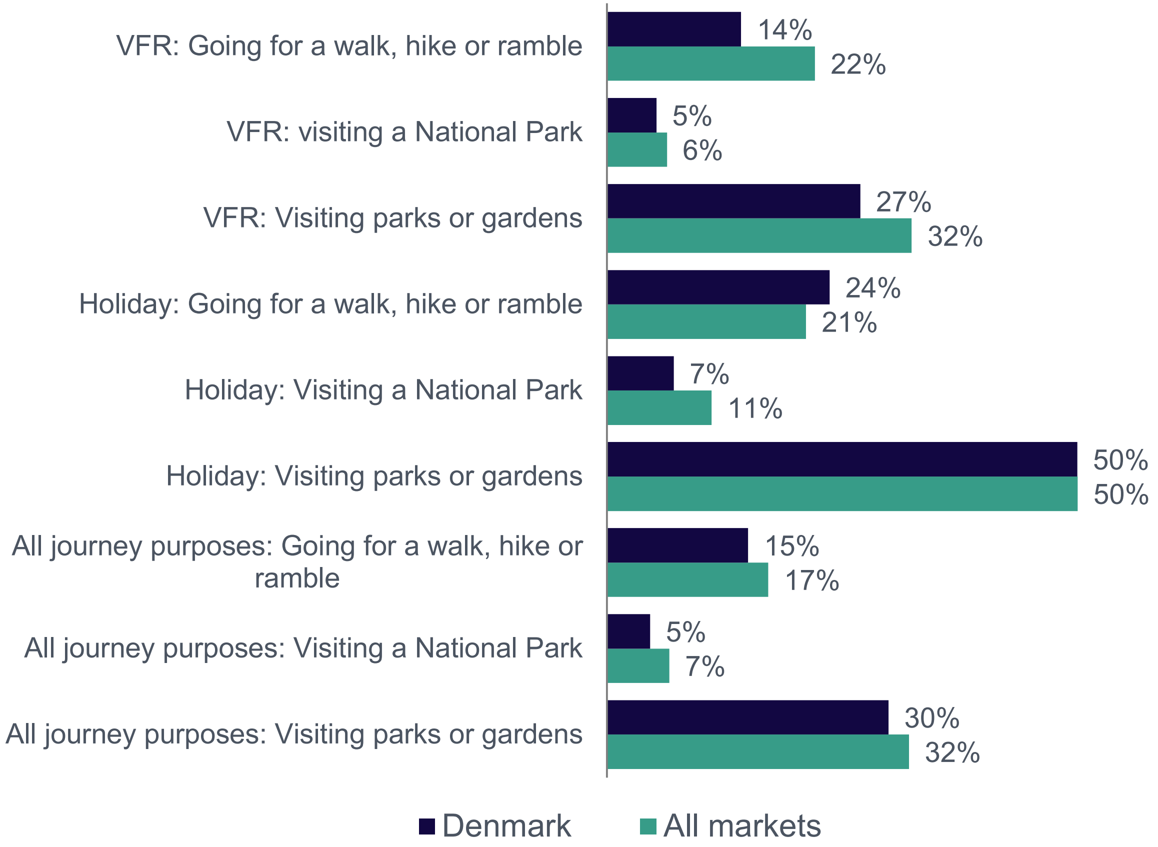
Source: International Passenger Survey by ONS, 2011, 2014 and 2019 (watched sports live)

2.1 Inbound activities: outdoors

Propensity to go walk along the coast or in the countryside



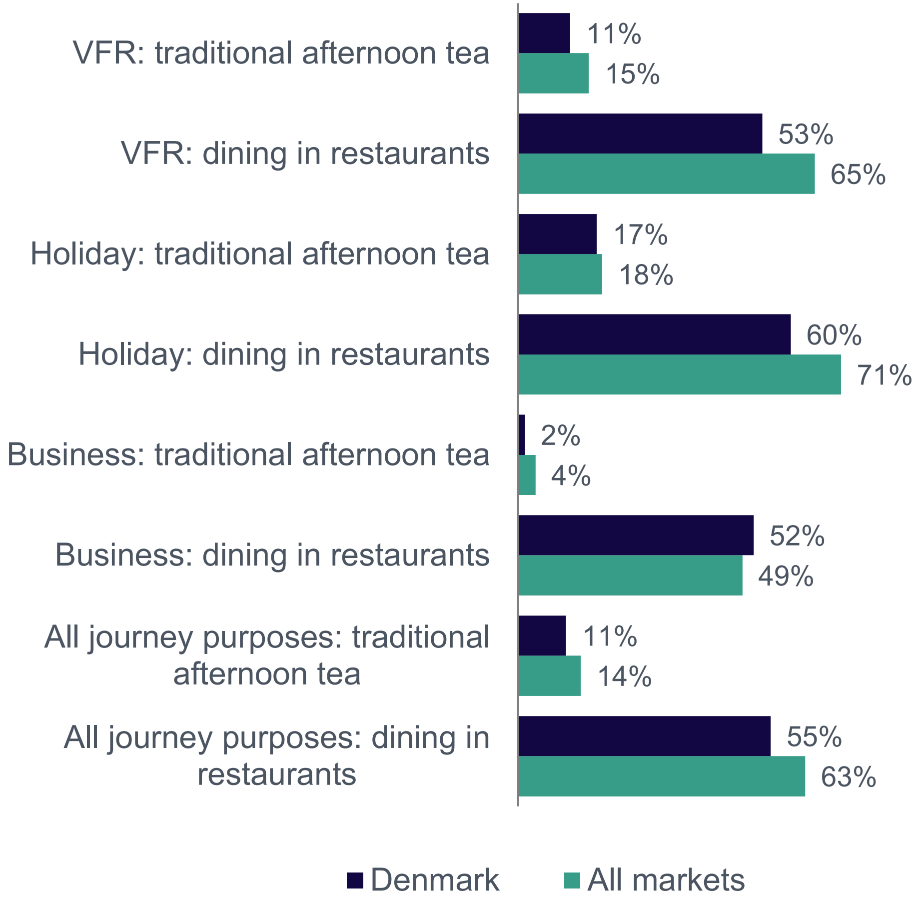
Propensity to enjoy the outdoors



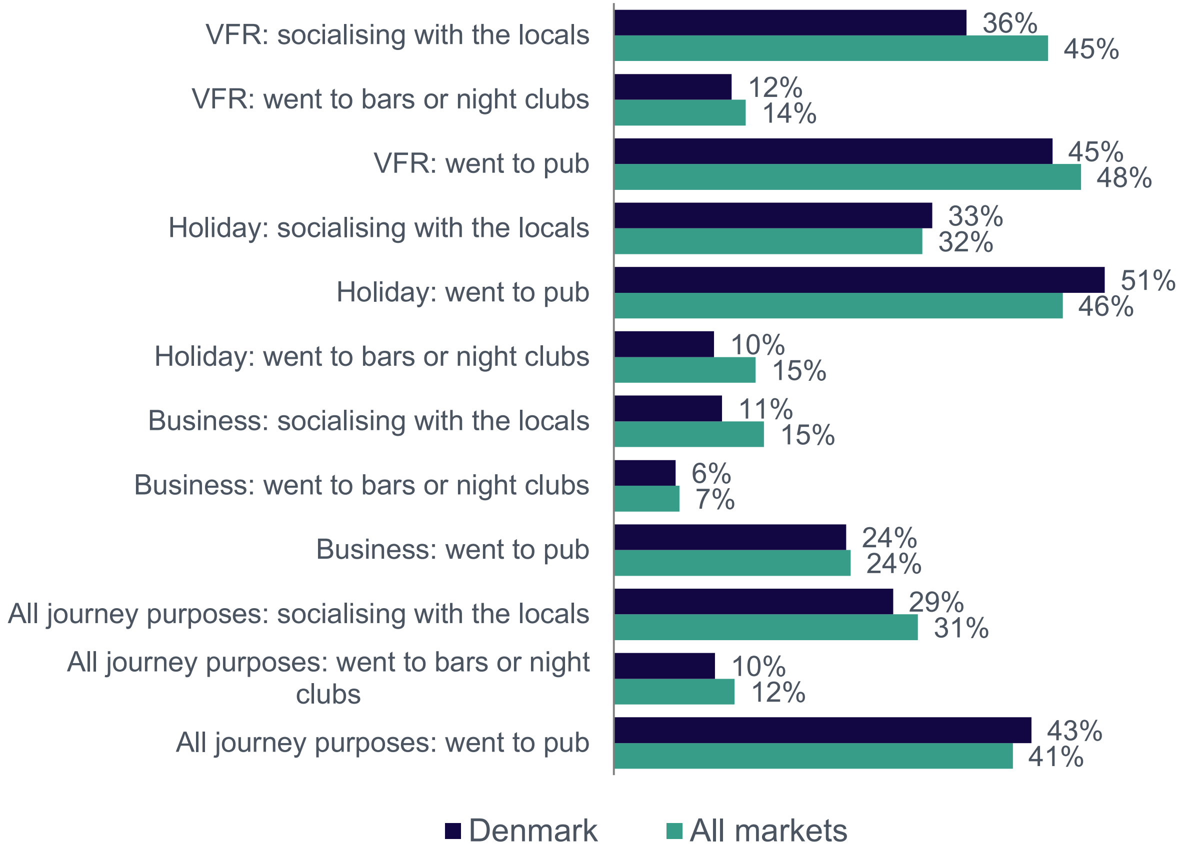
Source: International Passenger Survey by ONS, 2019 (walking along the coast/in the countryside), 2016 (visiting parks and gardens and a national park), 2014 (hiking/rambling)

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



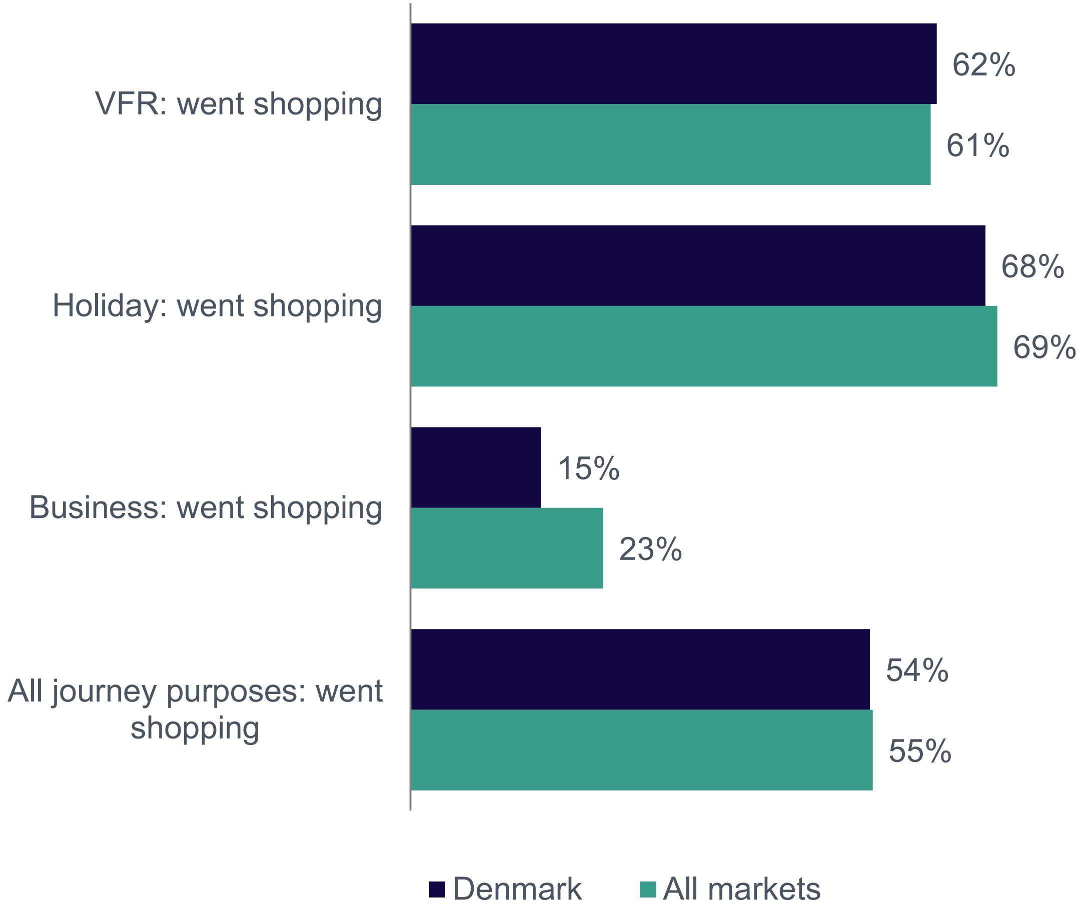
Propensity to go to the pub or bars and night clubs, or to socialise with locals



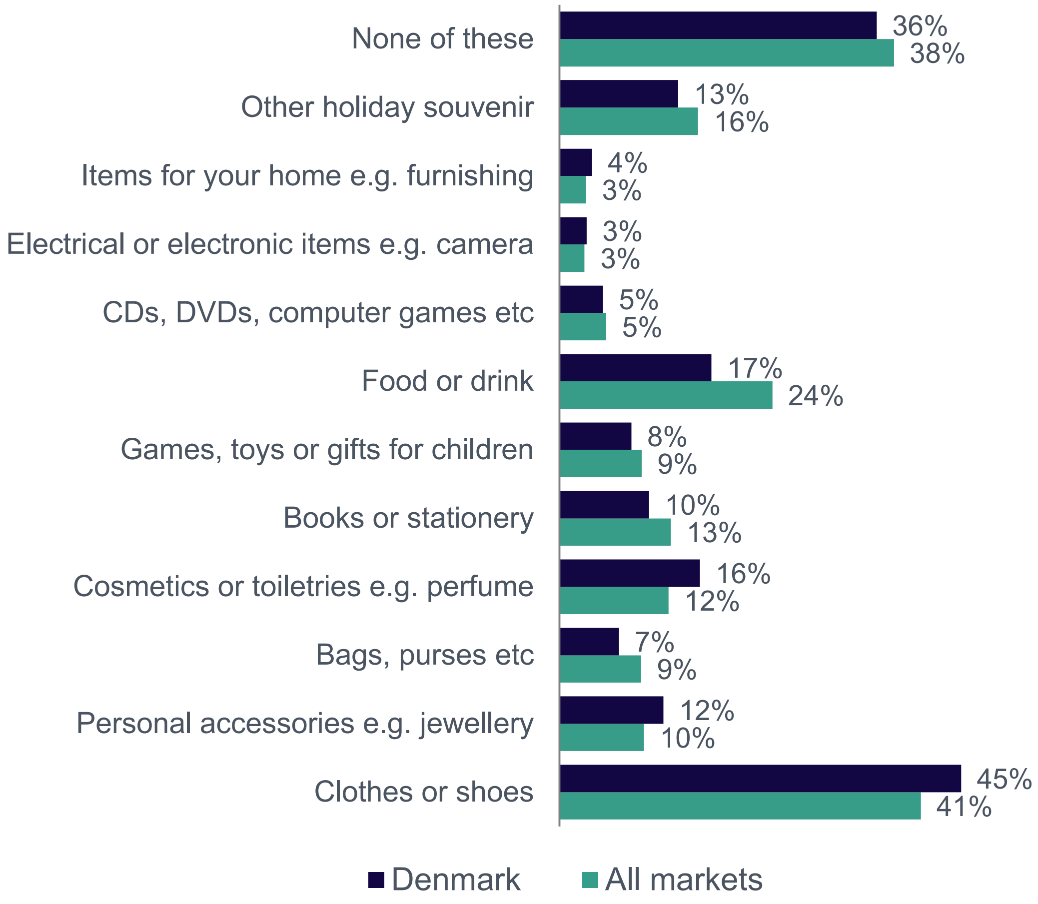
Source: International Passenger Survey by ONS, 2019 (dining in restaurants and having a traditional afternoon tea) and 2017 (all other activities)

2.1 Inbound activities: shopping

Propensity to go to shopping



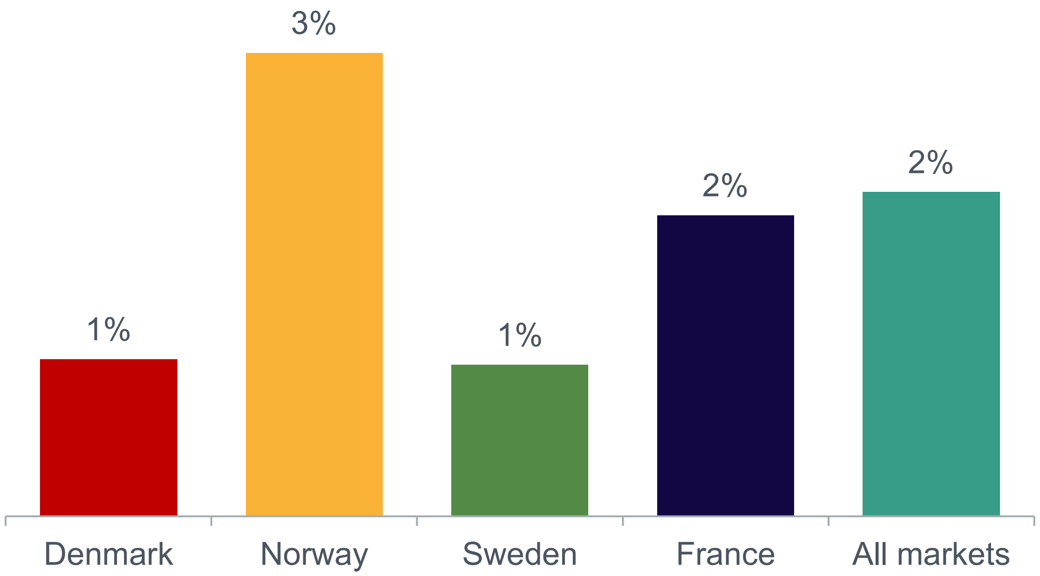
Propensity to purchase selected items



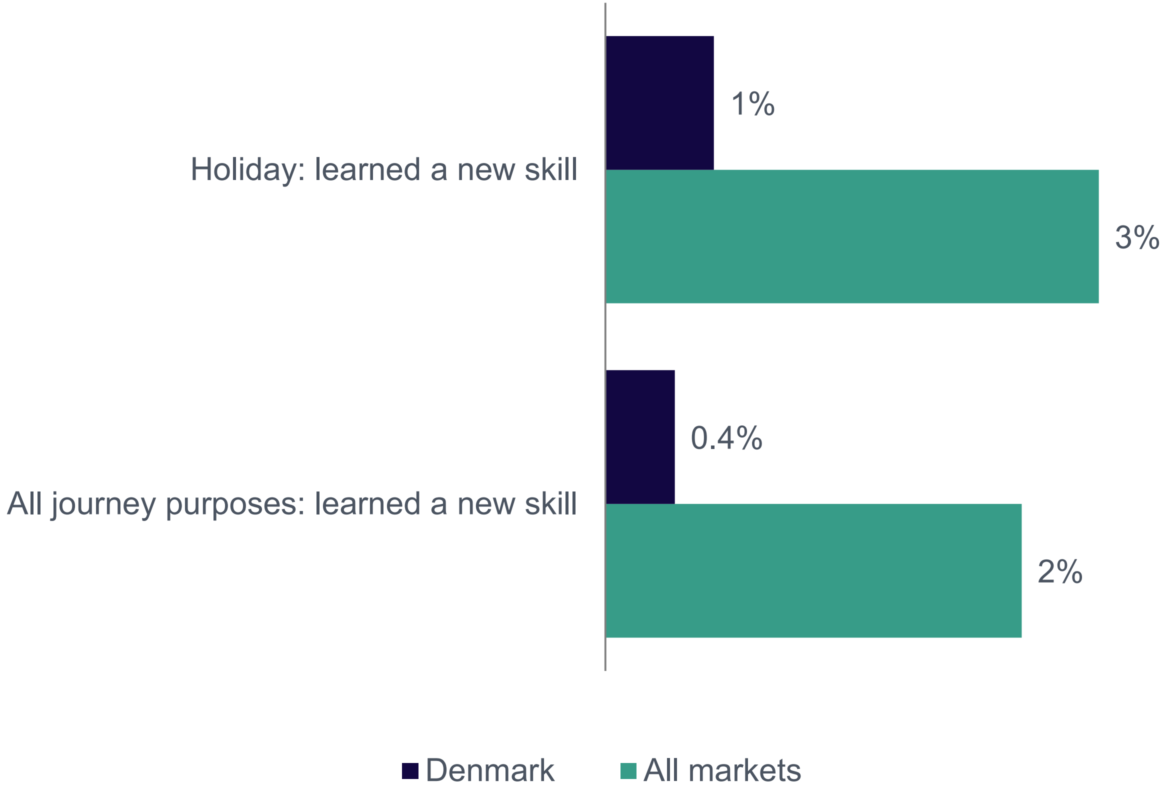
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is to be updated shortly given the revision of the 2009-2018 IPS data in May 2020

2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK (share of all visits)



Propensity to learn a new skill or craft



Source: International Passenger Survey by ONS, 2019 (new skills/craft), 2018, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.

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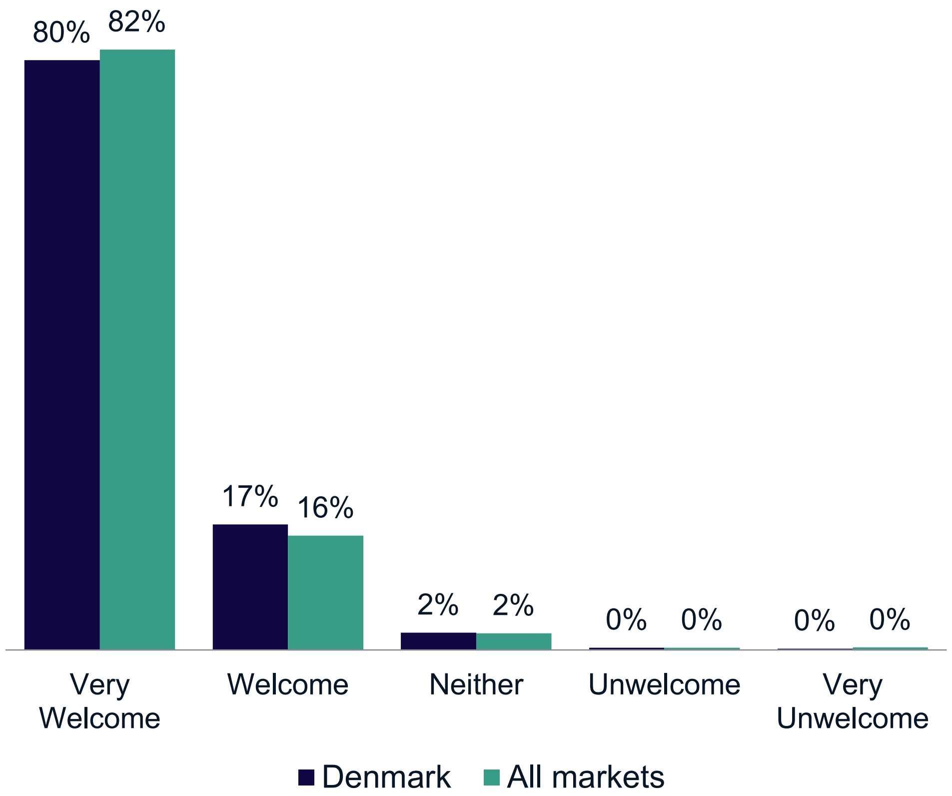
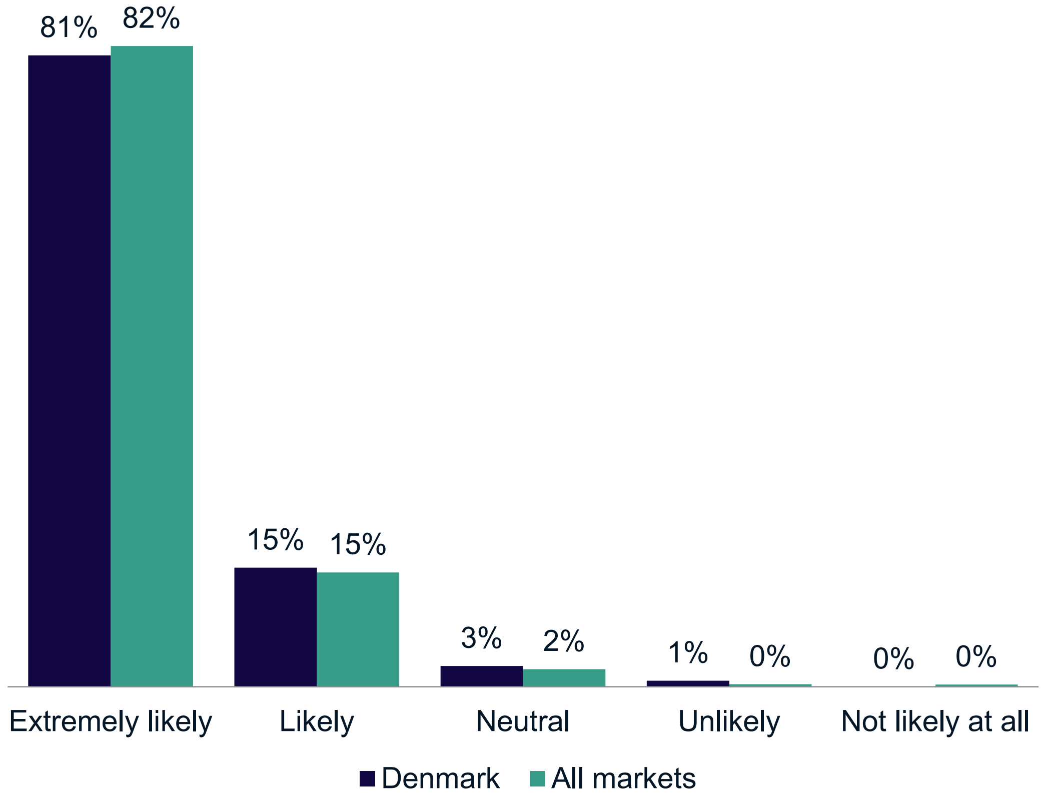
2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain



Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017 (excl. UK nationals and nil nights)

2.3 Perceptions of the UK (1)

- Cultural attractions play a key role in attracting Danes to holiday in Britain for almost two thirds of visitors.
- About a third of Danish holiday visitors are motivated by the ease of access to Britain and getting around while here on holiday and vibrant cities and over-index on these factors in comparison to the all-market average.
- Being a destination where English is spoken, the ease to plan and organise a holiday in Britain, visiting friends and/or relatives, Britain’s contemporary culture, as well as trying local food and drink and experiencing a mix of old and new are also stated as reasons to holiday in Britain by an above-average share of Danish visitors.
- Danes were less likely than average to state motivations like the wide variety of places to visit in Britain and the climate/weather.

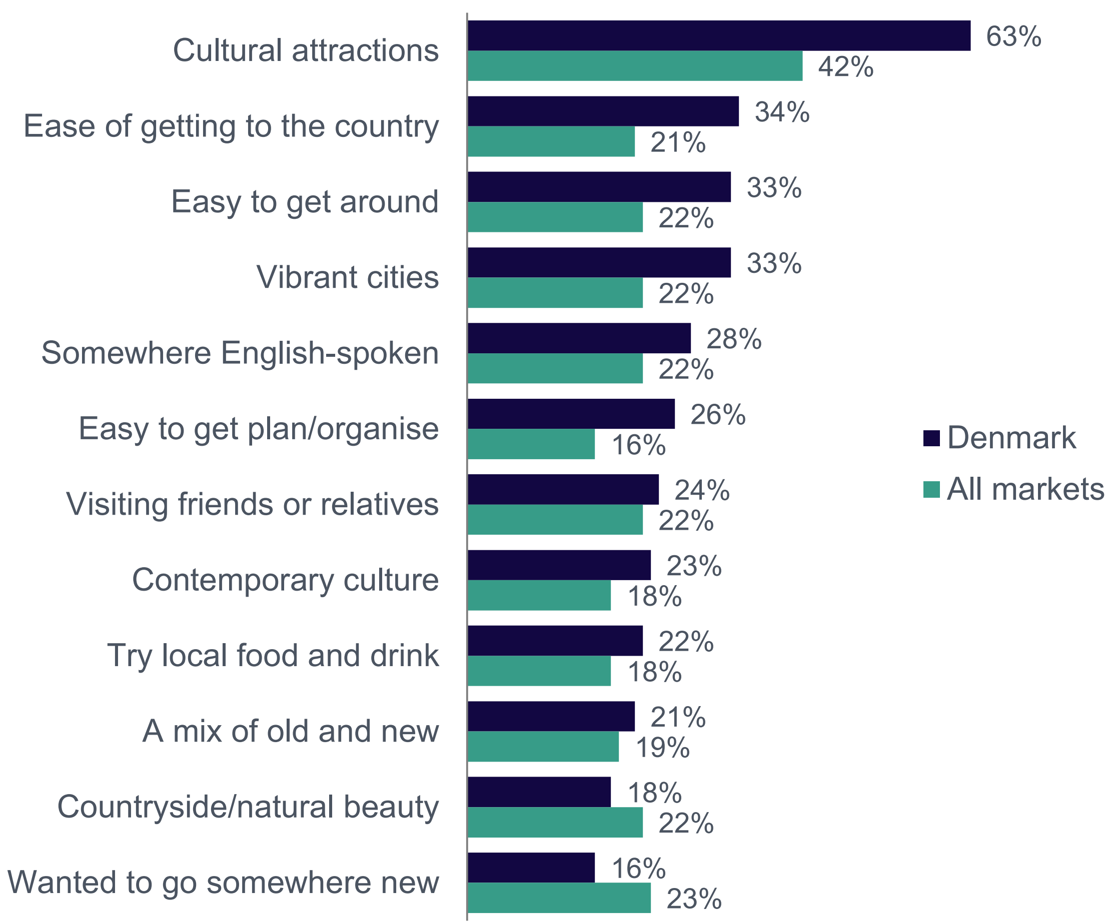
Areas of strength for the UK:

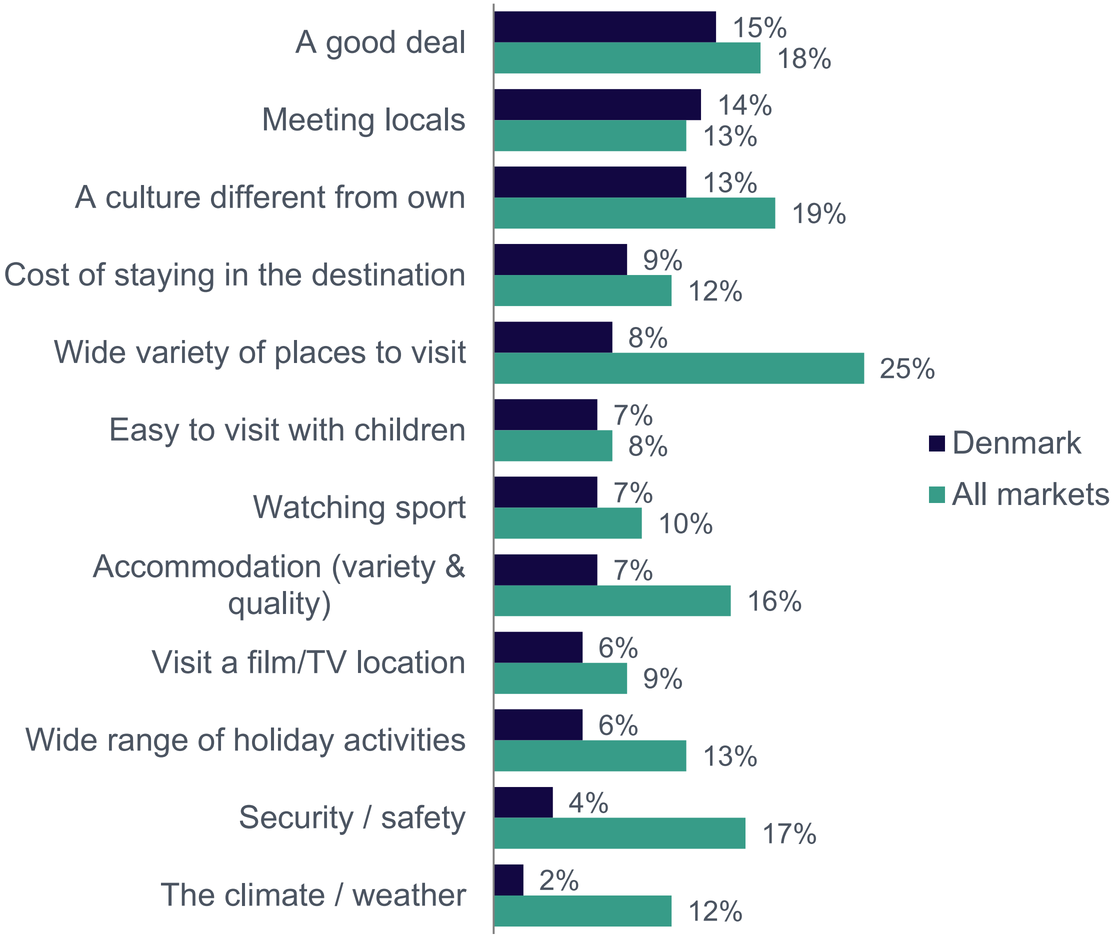
Cultural attractions are the biggest draw for Danish holiday visitors

Source: VisitBritain/Ipsos 2016

2.3 Perceptions of the UK (2)

Motivations for choosing Britain as a holiday destination





Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

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Understanding the market

Chapter 3

3.1 Structural drivers

- Population of about 6 million.
- There are 5 regions: Sjaelland, Hovedstaden, Midtjylland, Syddanmark and Nordjylland.
- The areas in Denmark with the most inhabitants are coastal areas, particularly in Copenhagen and the Eastern parts of the mainland. This explains the smaller share of visitors sourced from other areas.
- The official language is Danish along with Faroese, Greenlandic (an Inuit dialect) and German (small minority). English is taught as a second language. Danes often have a good command of English and usually enjoy speaking English when in Britain.
- Danish employees are usually entitled to 25 days of annual leave and there are 9 public holidays per year.

5.8m

Danish population (2021)

Source: Oxford Economics, CIA World Factbook 2021

3.1 Structural drivers: general market overview

General Market Conditions

- Denmark is the UK's 17th largest source market in terms of visits, and 25th most valuable in terms of visitor spending.
- The Danish economy had recovered from the Financial Crisis in 2008/2009 by 2014 which is a slower pace than in many other European countries, although prior to the coronavirus crisis the Danish economy performed solidly. Strong fiscal support for the economy during the crisis has softened the impact on the Danish labour market and inflation pressures are expected to remain low.
- As of 17 June 2021, Oxford Economics saw the Danish economy rebound strongly from the second quarter of 2021 with growth of 7.6%, as the stable health situation, and solid vaccination process have allowed for an easing of restrictions since mid-May and paving the way for a strong summer quarter. This strong growth is also expected to help recover some of the losses incurred during winter lockdown. Danish GDP is expected to grow by 2.6% for the year 2021 overall.

Key demographic and economic data

Measure (2021 data)	Denmark	Eurozone
Population (m)	5.8	339.8
GDP per capita PPP (US$)	53,121	43,463
Annual average GDP growth over past decade (%)	1.6	0.8
GDP growth year-on-year (%)	2.6	4.5

Economic indicators (%)

Indicator	2019	2020	2021	2022
Real GDP growth	2.8%	-2.7%	2.6%	3.1%
Real consumer spending growth	1.4%	-1.9%	2.1%	4.6%
Unemployment rate	3.7%	4.6%	4.3%	3.8%

Source: Oxford Economics

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	Estimate
Total population (2021)	5.8
Median age (2020)	42 years old
Overall growth rate (2020-2025)	0.4%

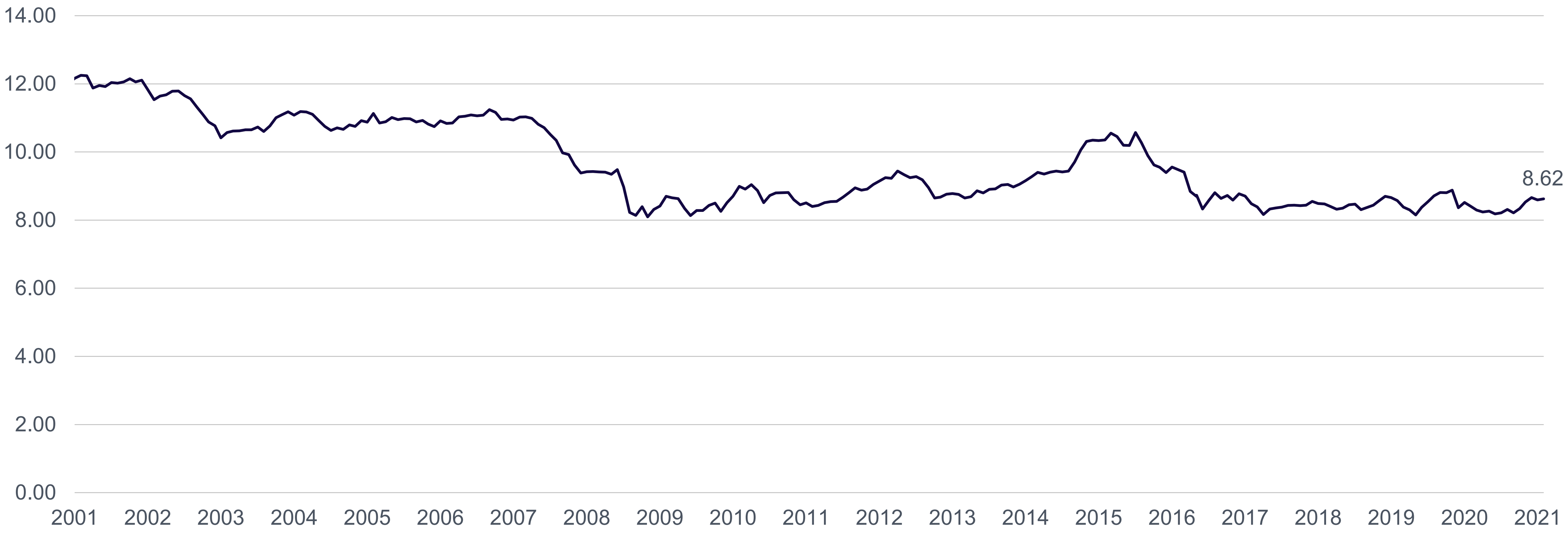
Indicator	1980	2015	2030	2050
Median age (in years)	34.3	41.6	42.3	44.2

- 88% of the Danish live in urban areas (World Bank estimate).
- The country has a population of about 6 million with a median age of 42 which is forecast to increase to 44 by 2050 at present.
- Most people in Denmark are well-educated and enjoy a very high standard of living with real GDP per capita in purchasing power parity terms of more than US$53,000 - above the Eurozone average and forecasted to increase in the years to come.

Source: Oxford Economics, CIA World Factbook 2021, World Bank 2019, Statista 2021

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in DKK)



Please find the most up-to-date exchange rate trend based on monthly averages on our website.

Source: Bank of England

3.2 Consumer trends

- Prior to the COVID-19 pandemic, Danes took 6.5 million long holidays abroad in 2019 with an average duration of 10 nights and average spend per person of DKK10,615/ £1,227. When it comes to short holiday trips of up to 3 nights, more than four in five of such trips are made as staycations.
- VisitBritain's international recovery sentiment tracking shows 72% of the Danish considered taking an international leisure trip in 2021, showing strong desire to travel. Half of Danes had either not given much thought to planning their next leisure trip abroad, or had started thinking about it but not yet decided where to go, showing a considerable opportunity to influence destination choice and bookings (status spring 2021). Visit Denmark's research carried out in Denmark in mid-April to early May 2021 further confirms the growing appetite among Danes for a foreign holiday, even if more Danes consider a staycation for 2021 than they did before.
- Vaccinations are the key driver to travelling abroad for the Danish.
- Almost seven in ten Danish respondents look for less crowded places to visit even if this might mean missing some must-see attractions, and more than three in five say they'll leave booking until the last minute. The coast and large cities as well as roaming around visiting many types of places are all roughly equally popular among Danes considering international travel in 2021.

72%
of Danes consider taking an international leisure trip in the next 12 months in spring 2021

Sources: TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021;
Visit Denmark Danskernes Ferieplaner published June 2021; Danmarks Statistik 2020

3.2 Consumer trends: impact of COVID-19

The impact of COVID-19 on Danish travel behaviour

- 2020 saw an estimated 79% year-on-year decline in volume and a 78% decline in value of visitation from Denmark to the UK as a result of the COVID-19 pandemic.
- The second wave of VisitBritain's international recovery sentiment tracking research reveals: 72% of the Danish considered taking an international leisure trip in the next 12 months (fieldwork 24th March – 5th April 2021), showing a strong desire to travel. Of them, 77% are considering Europe and 10% Britain.
- Britain ranks 6th for consideration of the Danes hoping to go on a European leisure trip, behind Spain, Germany, Greece, Italy and France, ahead of Sweden.
- As of spring 2021, 88% of Danes indicate that they are happy to take pre-trip tests if required, more than half are hoping to travel as soon as they are vaccinated. Almost seven in ten Danish respondents look for less crowded places to visit even if this might mean missing some must-see attractions, and more than three in five say they'll leave booking until the last minute.
- At the same time, half of Danes had either not given much thought to planning their next leisure trip abroad, or had started thinking about it but not yet decided where to go, showing a considerable opportunity to influence destination choice and bookings.

Key activators for an international leisure trip	Denmark	All markets
Receiving a COVID-19 vaccination	59%	43%
Money-back guarantee should I wish to cancel my trip	45%	34%
Removal of quarantine policies in destination country	43%	32%
Removal of quarantine policies in home country	37%	28%
A significant decrease in coronavirus cases at destination	36%	34%
The introduction of a vaccine passport	35%	22%

Source: Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021,
NB: Sentiment data is from a tracking study, and results may change in subsequent waves

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3.2 Consumer trends: overall travel trends

Travel trends

- Prior to the COVID-19 pandemic, Danes took 6.5 million long holidays abroad in 2019 with an average duration of 10 nights and average spend per person of DKK10,615/ £1,227. Spend on holiday trips abroad is significantly higher than on domestic holidays.
- European destinations proved most popular. Spain alone received 15% of such long holiday trips, followed by Germany, Italy, and Greece. Among the most popular long-haul destinations for long holidays are the USA (4%) followed by Thailand (2%). The UK did not make the top 10 of most popular long holiday destinations in 2019. A further 4.4 million long holiday trips taken by Danes are made within their home country with an average duration of 7 nights and average spend per person DKK2,730/ £316.
- Danish short holidays of 1-3 nights are most often made as a staycation with more than four in five Danes opting for their own country. Of the 15.1 million short holidays, only 2.8 million short holiday trips had a destination abroad. Danes spent an average of DKK1,655/ £191 per person on such short holiday trips with an average duration of 2 nights.
- A total of 3.7 million business trips have been taken by Danish business travellers both within Denmark and abroad in 2019. These trips lasted an average of 4 nights with average spend of DKK4,910/ £567 per person.
- Most Danes indicated that their financial situation has not been negatively affected by the COVID-19 pandemic with only a below average share saying it is still uncertain or there has been a negative effect.
- Visit Denmark's research carried out in mid-April to early May 2021 shows that almost two thirds (64%) consider a holiday in Denmark in 2021, up from 59% in 2020. The study also found a growing consideration for Denmark instead of a destination abroad as an option of choice rather than an option due to the lack of alternatives as was the case during the pandemic. Amid phased border reopenings, there still is a growing appetite for taking a holiday abroad, too.
- Hotel accommodation is now the most popular accommodation choice for 2021 (up from 2020), while the share of those who look to stay at their own holiday home or a holiday rental declined.
- The coast and large cities as well as roaming around visiting many types of places are all roughly equally popular among Danes considering international travel in 2021.

Sources: Danmarks Statistik 2020; Visit Denmark Danskernes Ferieplaner published June 2021; TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021

3.3 Booking and planning

- A large proportion of Danish holiday visitors tend to start thinking about their trip early with 37% doing this as early as half a year or more in advance.
- 40% of bookings were made in the three to six month window before the arrival to Britain; 39% of Danish bookings happened within three months of the trip.
- In normal times, Danes tend to book their trip further in advance than many other visitors. Compared to the all-market average, 10% fewer made their booking within two months of arrival in Britain.
- Most bookings to Britain were made online; however, when travel and accommodation are booked together, about one in ten visitors made their booking over the phone and only 4% face-to-face.
- Danes are less likely to buy any of the above items before their trip than the all-market average. Theatre/musical or concert tickets are the most likely to be bought in advance of the trip to Britain. A similar picture is true after arrival in Britain, with Danes less likely to buy the above products than the average visitor. The only exception are tickets / passes for other tourist attractions which were in line with the all market average and are by some distance the mostly likely to be purchased while in Britain.

Over half
of Danish visitors booked their trip at least 3 months before their arrival in Britain

Source: VisitBritain/IPSOS 2016

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	Denmark	All markets
Online	92%	85%
Face-to-face	2%	10%
By phone	4%	4%
Don't know	3%	1%

- Danish visitors tend to be very comfortable with booking their trips to Britain online, especially when they booked travel (i.e. transport to Britain).
- Only 4% of bookings were made face to face when booking a holiday package (travel and accommodation combined). This compares to the global average of 26%.

How trips to Britain were booked: accommodation only

Booking method	Denmark	All markets
Online	75%	70%
Face-to-face	2%	6%
By phone	2%	3%
Did not book/stayed with friends/relatives	16%	18%
Don't know	6%	2%

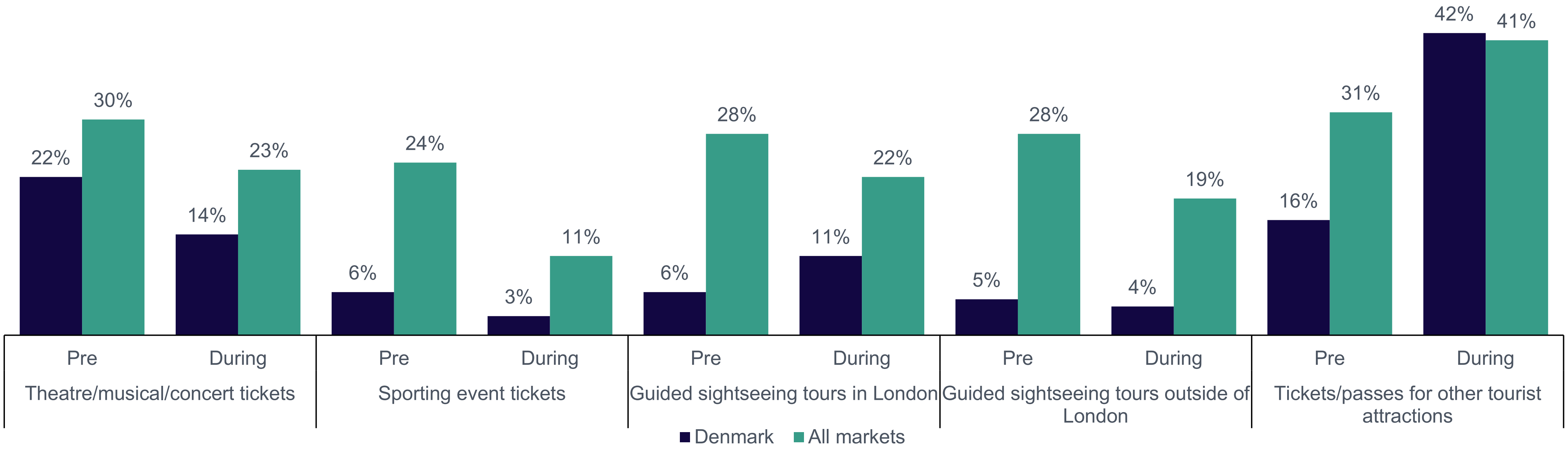
How trips to Britain were booked: travel + accommodation

Booking method	Denmark	All markets
Online	82%	64%
Face-to-face	4%	26%
By Phone	11%	9%
Don't know	4%	1%

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip



- Prior to trip: Danes are less likely to buy any of the above items before their trip than the all-market average. Theatre/musical or concert tickets are the most likely to be bought in advance of the trip to Britain.
- During the trip: A similar picture is true after arrival in Britain, with Danes less likely to buy the above products than the average visitor. The only exception are tickets / passes for other tourist attractions which were in line with the all market average and are by some distance the mostly likely to be purchased while in Britain.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Denmark	All markets
6+ months	37%	49%
3-6 months	34%	31%
1-2 months	19%	13%
Less than 1 month	6%	5%
Don’t know	5%	3%

Deciding on the destination

Lead time	Denmark	All markets
6+ months	34%	32%
3-6 months	34%	38%
1-2 months	20%	19%
Less than 1 month	5%	7%
Don’t know	7%	3%

Looking at options/prices

Lead time	Denmark	All markets
6+ months	21%	21%
3-6 months	41%	37%
1-2 months	25%	27%
Less than 1 month	6%	12%
Don’t know	8%	4%

Booking the trip

Lead time	Denmark	All markets
6+ months	13%	14%
3-6 months	40%	32%
1-2 months	30%	28%
Less than 1 month	9%	21%
Don’t know	9%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain

- Almost two in five of the Danish visitors tended to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; about one in three did this three to six months in advance.
- 68% made their decision to travel to Britain at least three months prior to the actual journey (half of these six months or earlier).
- About two in five Danish visitors looked at options and prices between three and six months ahead of the trip and 40% also made the booking in the same time frame. One in four were more spontaneous and looked at options between one and two months before the trip and 6% within one month.
- Many Danes book their trip earlier than the average visitor, compared to the all-market average, 10% fewer make their booking to Britain within two months of arrival.
- Most of the Danish visitors who booked travel and accommodation separately booked it directly with the service provider 77%. 59% of those who booked accommodation separately purchased it directly from the accommodation provider and 34% from a travel agent/tour operator or travel comparison website.

Danes were more likely than other visitors to book early prior to the pandemic.

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 Reaching the consumer

- The most influential source for destination choice for Danish visitors are friends, family and colleagues followed by price comparison websites and information from search engines. Travel agent or tour operator websites and talking to friends and family on social networks also feature among some of the most important influences on where to go for a holiday.
- Whilst travel providers and online sources such as social media are popular for researching and making a destination choice, still one in five Danish consult travel guidebooks, travel features and special deals in magazines, newspapers or on TV.
- On average, Danes watch about 2 hours and 28 minutes of TV per day with habits shifting away from traditional TV to streaming services for all areas of consumption apart from news broadcasts.
- The viewing time spent on traditional television varies considerably according to age group. Where the 12-18-year-olds spend 31 minutes on TV daily, the viewing time for the 71-year-olds or over is 278 minutes.

Cultural attractions

are the biggest draw for Danish holiday visitors choosing Britain

Sources: VisitBritain/IPSOS 2016, DR Medieforskning 2020; Media Develpment 2020 by the Danish Agency for Culture and Palaces

3.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- Although fewer and fewer people watch traditional television, this does not mean that the viewing of audio-visual content is declining. The decrease in viewing time of traditional television from 2017 to 2019 (6%) is smaller than the strong increase that streaming witnessed (11%). In addition, in 2019, three out of four Danes still watched traditional television on a weekly basis.
- National public TV channels: Danmarks Radio broadcasts through six main channels: DR1, DR2 (Documentary), DR3 (Young Adult), DRK (Culture), DRUltra (Teens) and DRRamasjang (Children), which make up about 24% of the Danish television market.

Radio

- Danmarks Radio is the dominant player with the largest share of the radio audience market. 3 national channels: P1/P2 (news, culture and public affairs), P3 (Youth) and P4 (Pop Music + regional target 40+) along with many DAB digital niche stations; New public channel Radio24syv (talk radio); Local commercial radio: Bauer Media + Jysk/Fynske Medier.
- 35% of Danes listen to the radio every day but streaming is increasing.

Newspapers

- In 2019, the measured news sites online had 3,510,000 weekly users, which represents an increase of 3% compared to 2018. The printed dailies thus reached a weekly coverage of 2,557,000 readers in 2019, almost a million fewer than online readers. Newspaper coverage continued to decline. Thus, weekly coverage in 2019 was 1,409,000 lower than in 2010.
- The biggest dailies are Politiken (Biggest newspaper in Denmark), Jyllands-Posten, Børsen & Berlingske Tidende. The tabloids: EkstraBladet and BT. Both published daily with focus on entertainment, sports, culture and opinion pieces.
- Regional and local subscription morning papers: published at least 3x/week with the biggest being JydskeVestkysten, Sjællandsgruppen and SjællandskeMedier.
- Low frequency papers published 1x or 2x per week include local papers in the metropolitan areas and small regional and local papers, with Jysk-Fynske Medier owning the majority.
- Many of the newspapers have travel sections e.g. Politiken publishes a travel section every Saturday.

Source: Media Develpment 2020 by the Danish Agency for Culture and Palaces

3.4 Reaching the consumer: magazines and online media

Magazines

- Purchased magazines and corporate magazines, customer and free magazines as well as union magazines have more readers in 2019 than in 2018. Weekly magazines and industry magazines lost readers from 2018 to 2019.
- The largest increase is among the customer magazines and free magazines, which have 62,000 more readers in 2019 than in 2018. Corporate magazines and purchased magazines have 49,000 and 48,000 more readers, respectively, while union magazines have 21,000 more readers.
- Only the weekly and industry magazines have lost readers in the past year. For the weekly magazines, this is a drop of 65,000 readers, while the industry magazines have lost 31,000 readers.
- Vagabond is currently the only dedicated travel-only magazine in Denmark, although many lifestyle magazines have travel sections.
- Many unions still print magazines for their members, and there is no data available for the amount of niche magazines.

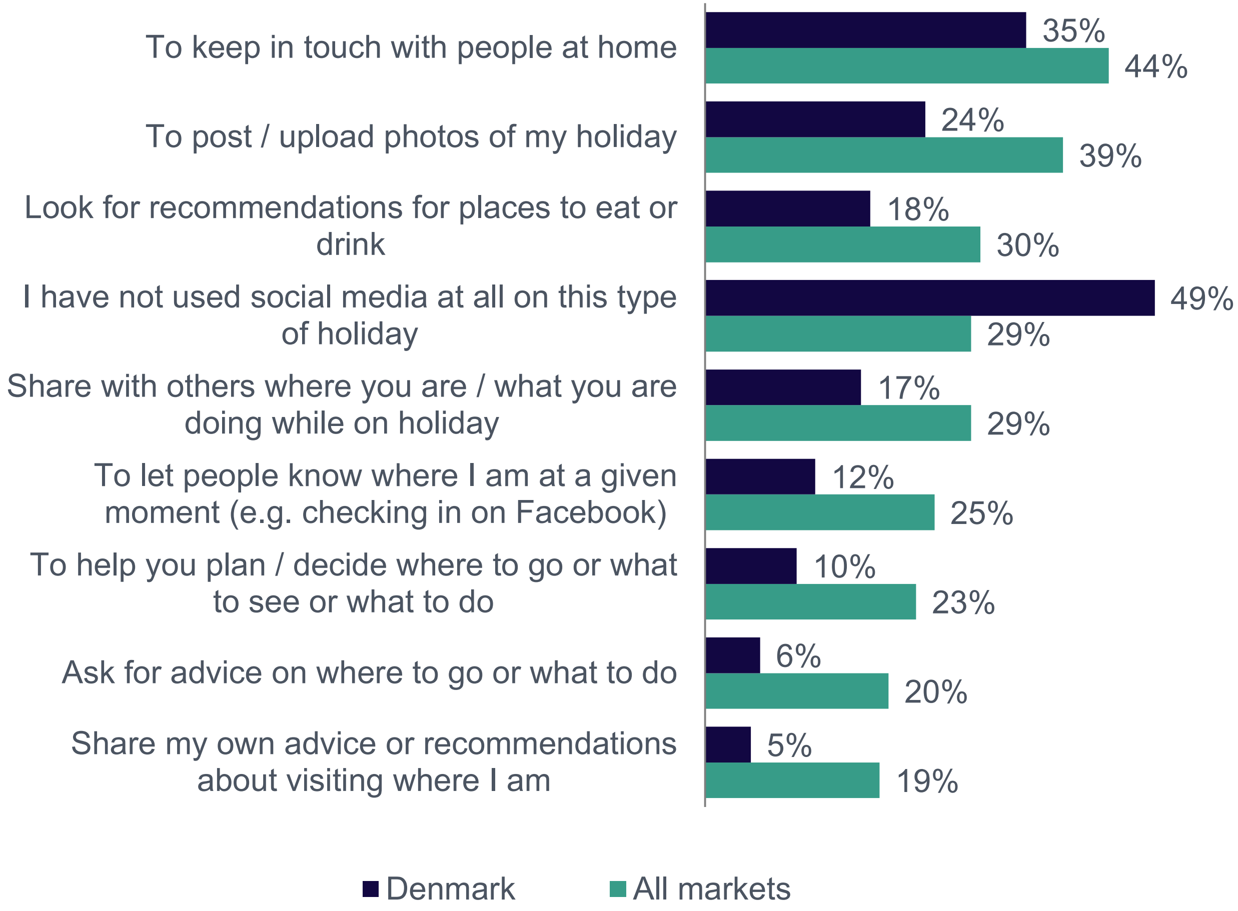
Online media

- The Internet is seen as the most important information source for Danes ahead of TV, daily newspapers and radio. The smartphone is becoming increasingly important among Danes in this context, particulary when they are looking to stream news.
- In 2019, 99% of all people aged 12 and over had access to the Internet. In particular, there has been an increase in the proportion with access to the Internet among the oldest age groups in the last 10 years. Among 55-70-year-olds, the proportion has increased from 89% in 2010 to 99% in 2019. Among the oldest aged 71 and over, the proportion has increased from 58% in 2010 to 93% in 2019.
- There is a clear connection between time consumption on the Internet via mobile / smartphone and age. The younger, the longer time is spent: In 2019, 15-24-year-old smartphone users spent 351 minutes (5 hours and 51 minutes) on the Internet via smartphone per week, and the 71-75-year-olds spent 84 minutes (1 hour and 24 minutes).
- In 2019, the streaming market at home is dominated by six services: Netflix, DRTV, YouTube, TV 2 Play, Viaplay and HBO Nordic

Source: Media Develpment 2020 by the Danish Agency for Culture and Palaces

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

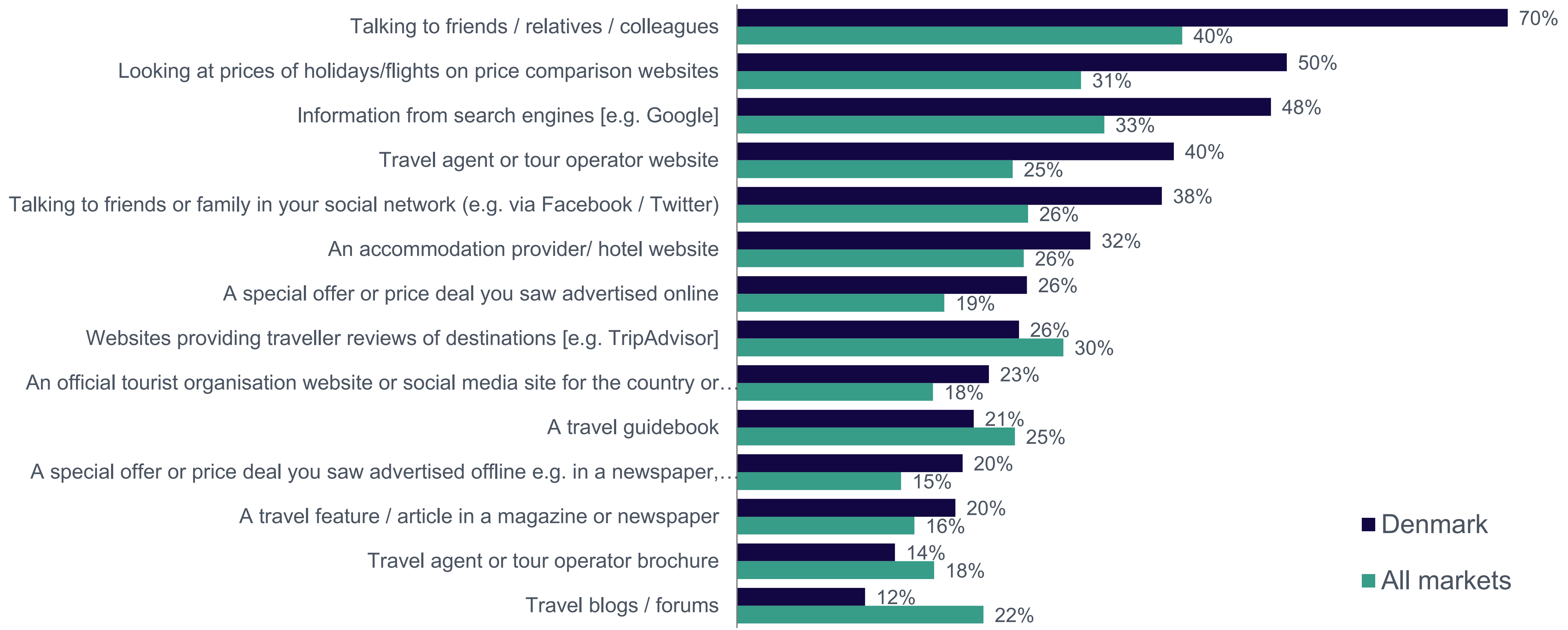


- The social media channels most used in the Danish market are Facebook, Pinterest, Twitter, Youtube, Instagram (by market share as of May 2021).
- Almost half of Danes have not used social media at all on holidays abroad, which is the highest proportion of all 20 countries included in this survey. More than one in three like to keep in touch which people at home.
- 50% like to stay connected whilst they are on holiday and 51% regard a smartphone as essential whilst they are on holidays, both below the all market average.
- Although 63% of Danish travellers love to take photos when they are on holiday, this is a lower proportion than in many other markets, similar to the other Nordics.
- 57% of Danish travellers have shared holiday photos online or would like to do so and 29% have shared holiday video content or would like to do so (lowest proportion out of all markets). 47% of Danes have used location technology to find places to visit and a 22% are interested in using it. Only 8% enjoy writing reviews on social media of places they have been to on holiday and trust in reviews is lower (34%) than in most markets.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?, Statista 2021

3.4 Reaching the consumer: influences (top 14)

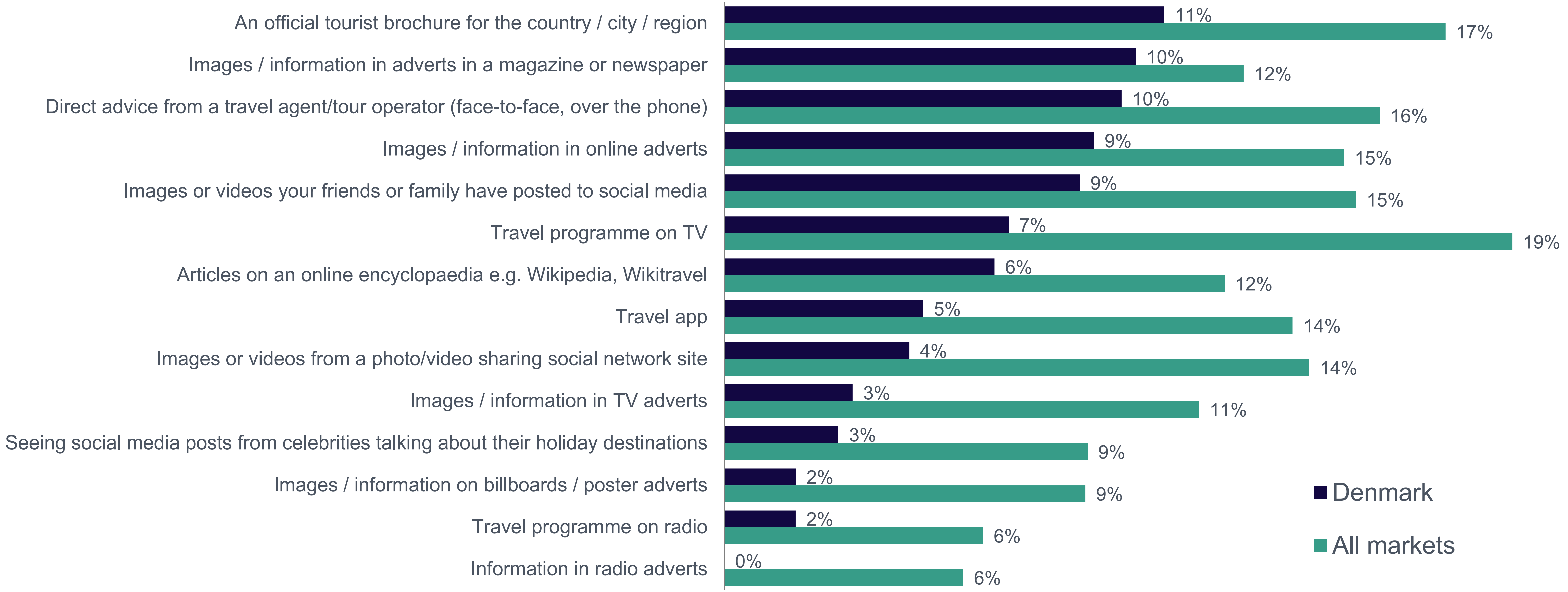
Influences on destination choice – top 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences (bottom 14)

Influences on destination choice – bottom 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

Access and travel trade

Chapter 4

VisitBritain/ Guy Richardson

4.1 Access: key facts

- 96% of Danish visits to the UK were made by plane. It is a short non-stop flight: usually between just under 2hrs and 4 hrs flight time, depending on the UK destination airport.
- Most flights come through the Copenhagen – London corridor.
- Annual seat capacity grew to around 2.3 million seats in 2019, before it declined sharply by 68% in 2020 as a result of the COVID-19 pandemic.
- Ryanair and SAS lead among airlines serving routes between Denmark and the UK providing half of seat capacity in 2019. British Airways ranks third with almost a fifth of annual seat capacity, ahead of Norwegian and easyJet.
- Danish visitors departing Britain by air pay £13 in Air Passenger Duty.

Almost all Danish visitors travel to the UK by plane

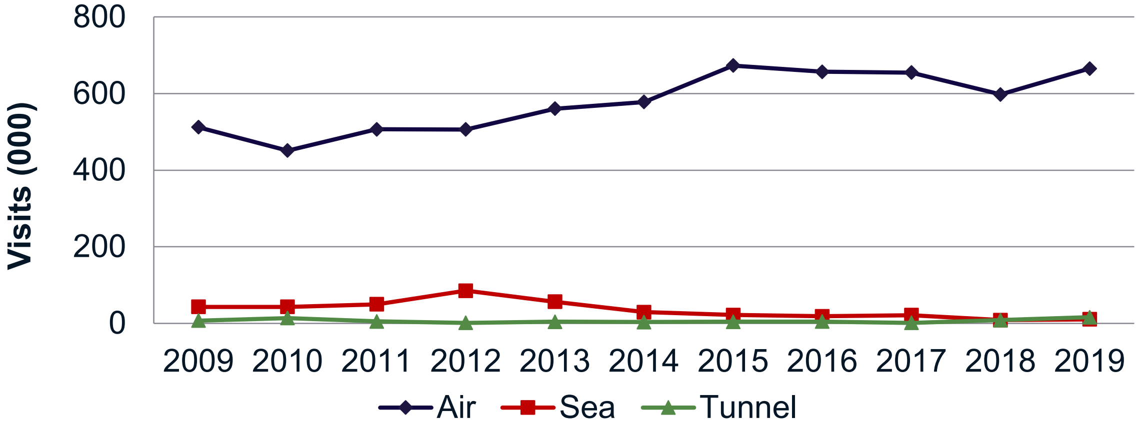
Access to Britain

Measure	2019
Weekly aircraft departures	280
Weekly seat capacity	43,622
Airports with direct routes in Denmark	6
Airports with direct routes in Britain	16

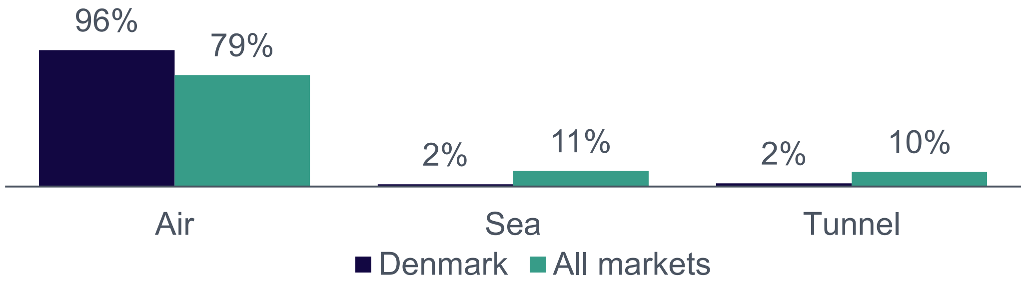
Source: Apex, non-stop flights only, International Passenger Survey by ONS

4.1 Access: mode of transport

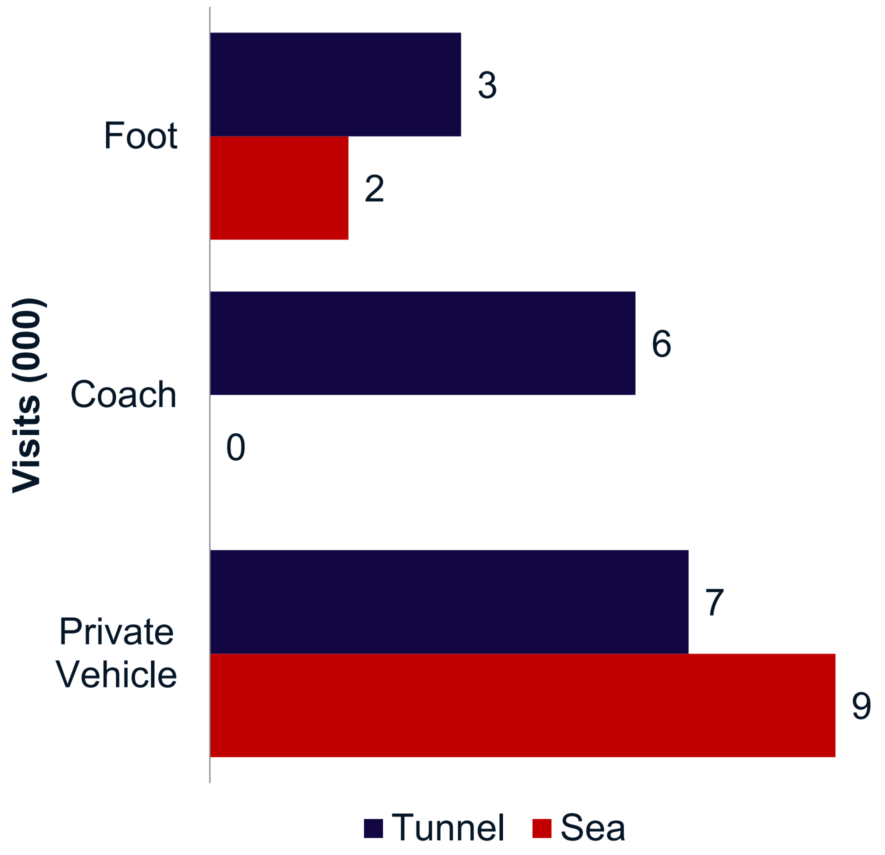
Visits by mode of transport



Annual share by mode (2019)



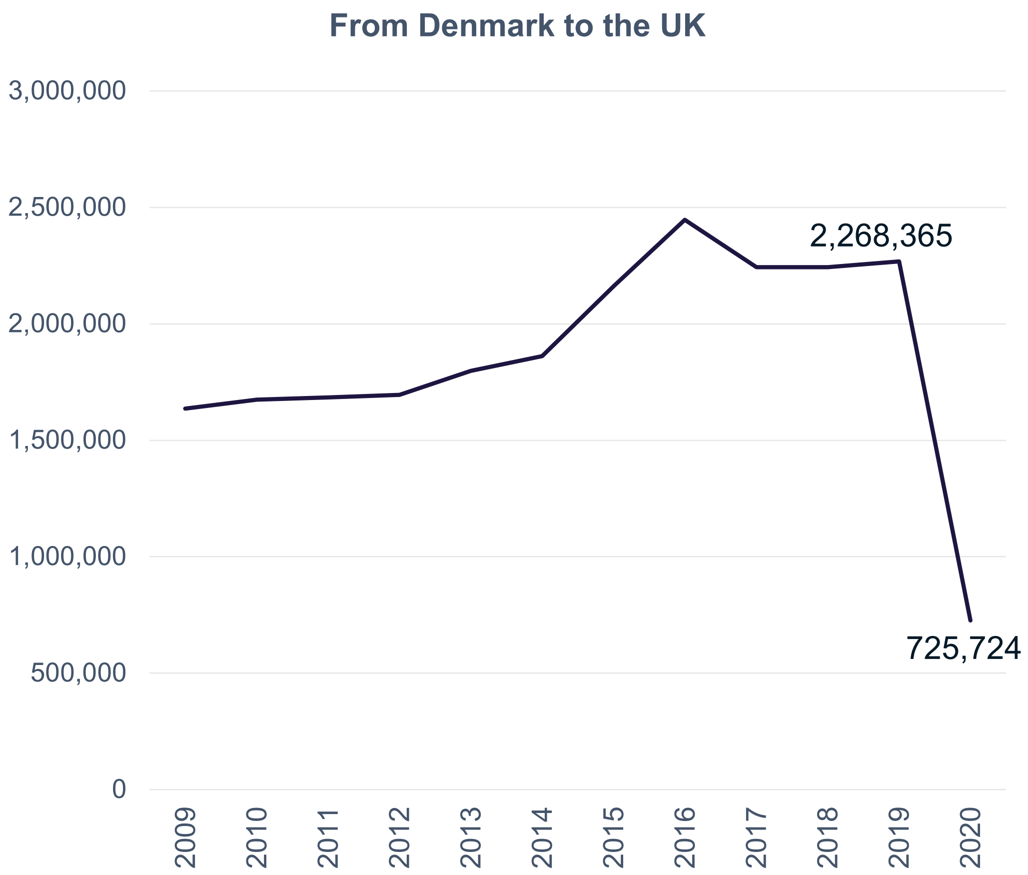
Sea and tunnel travel (000s) in 2019



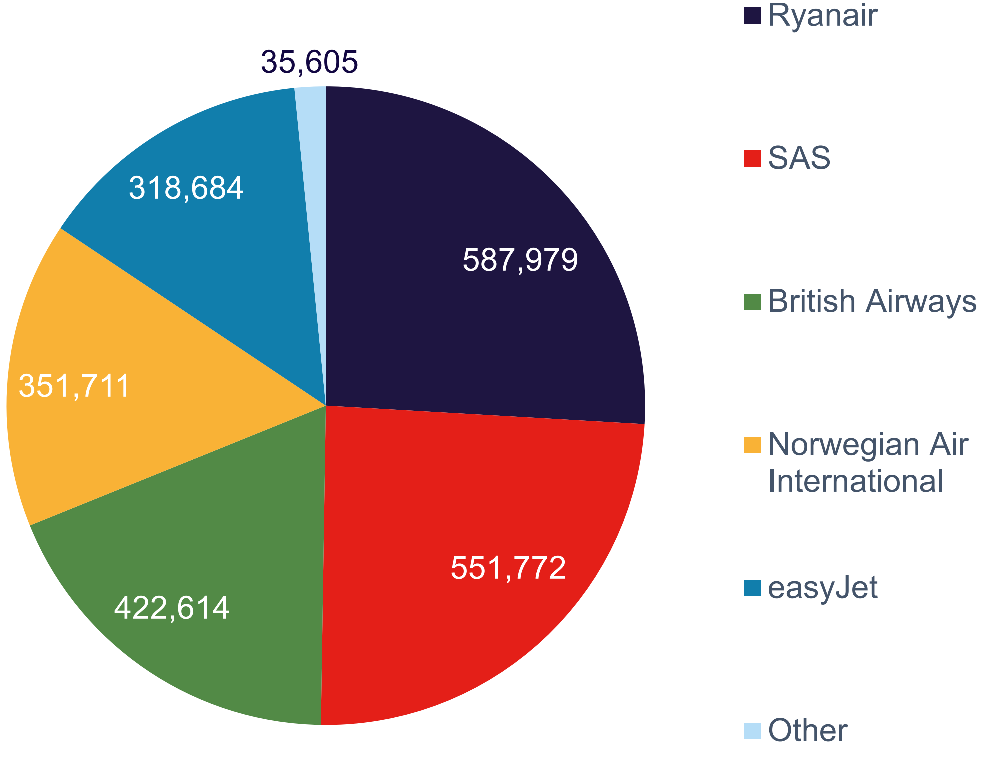
Source: International Passenger Survey by ONS

4.1 Access: capacity (1)

Annual airline seat capacity trends



Airline seat capacity by carrier (2019)

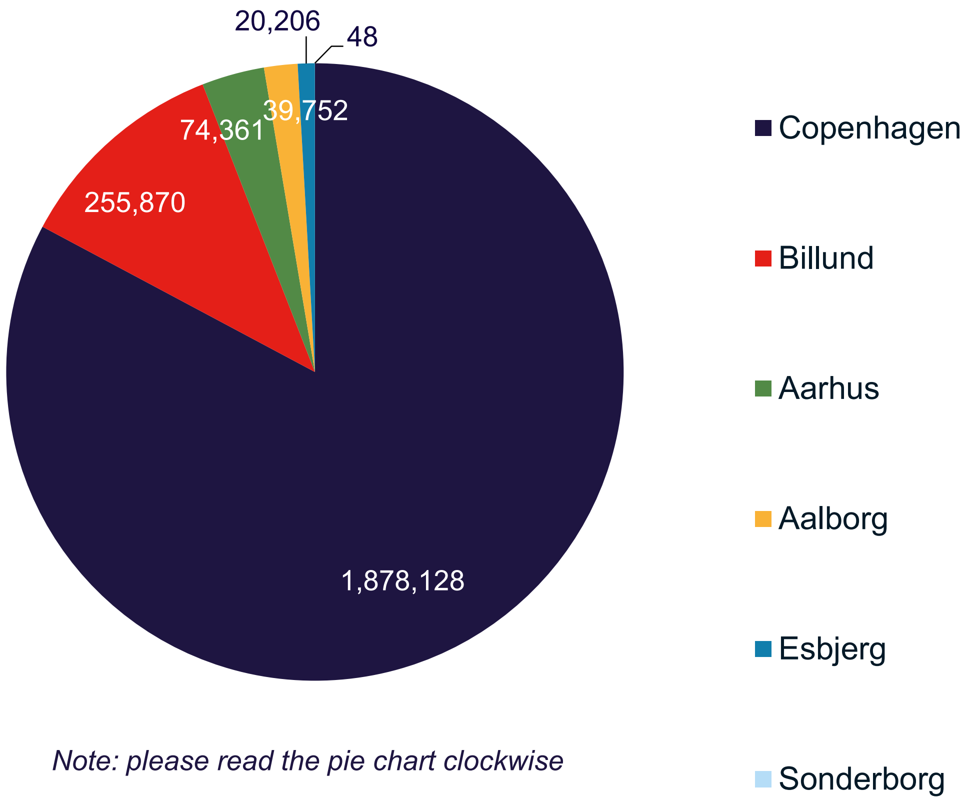


Note: please read the pie chart clockwise

Source: Apex, non-stop flights only. Other groups: Loganair, South African Airways, Danish Air Transport, Great Dane Airlines, FlexFlight, bmi Regional (ceased operations early in 2019), Jet2 and Air Alsie.

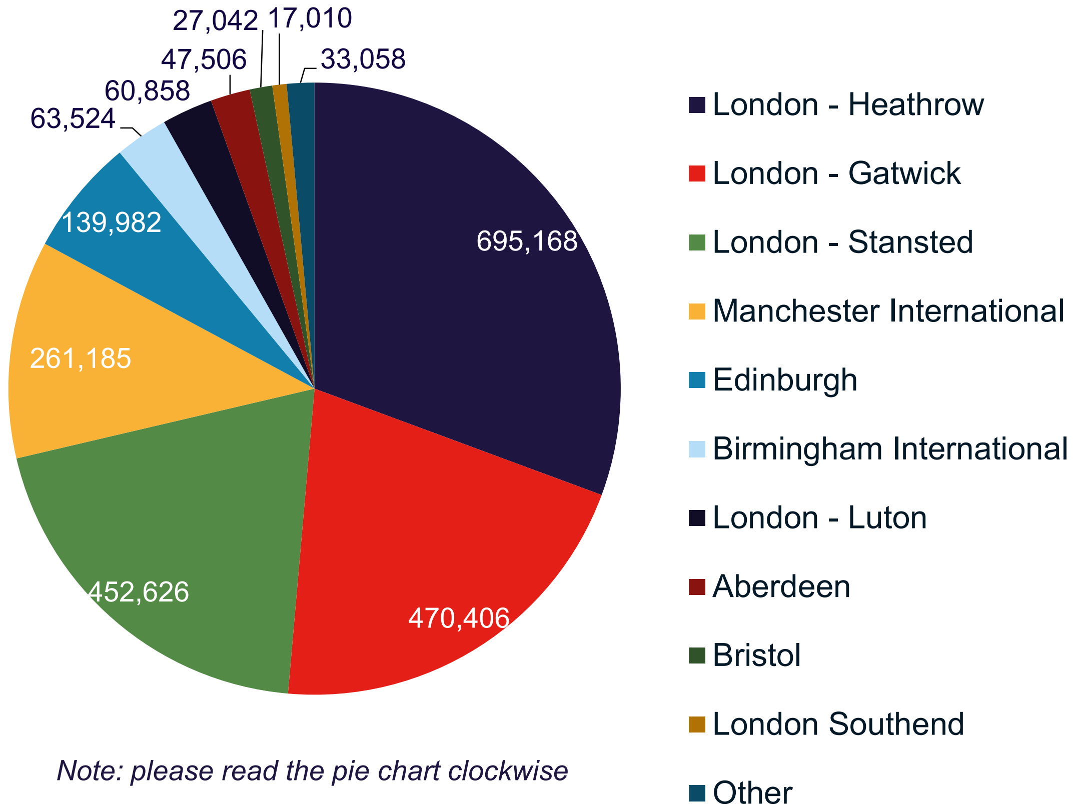
4.1 Access: capacity (2)

Origin airport annual seat capacity (2019)



Note: please read the pie chart clockwise

Destination airport seat capacity (2019)



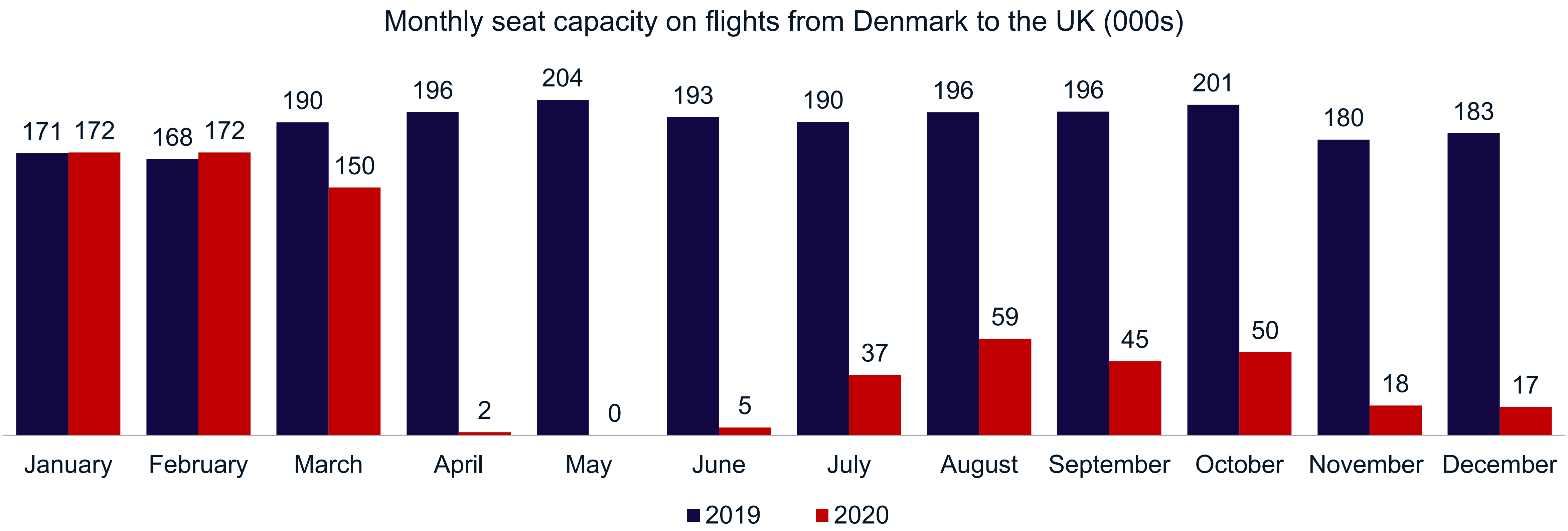
Note: please read the pie chart clockwise

Other in destination airports groups: London City, Liverpool John Lennon, Cornwall Airport Newquay, Newcastle, Leeds/Bradford and East Midlands.

Source: Apex, non-stop flights only.

4.1 Access: impact of the COVID-19 pandemic

Impact of the COVID-19 pandemic on connectivity



- Seat capacity on non-stop flights between Denmark and the UK declined by 68% in 2020 compared to 2019 as a result of the COVID-19 pandemic. The impact was felt most since April 2020, and monthly seat capacity was at least about 70% behind 2019 levels in subsequent months.

Source: Apex, non-stop flights only.

4.2 Travel trade: general overview (1)

- The key centre for travel trade is in Copenhagen; there are some operators scattered across the country but distances are short. Copenhagen could also be paired with a visit to neighbouring Malmo if you also cover Sweden.
- The planning cycle varies, so it is possible to do business in Denmark throughout the year.
- The Danish travel trade can be split into these broad categories: charter operators, business travel and MICE operators, online operators and retail travel agents.
- Some operators are pan-Nordic as well, so it is possible to reach the whole region via a single contact.
- Prior to the COVID-19 pandemic, Danish visitors who booked their travel to Britain separately to accommodation were most likely to book directly with the airline/train/ferry operator (77%). One in five chose to book through a travel agent/tour operator/travel comparison websites. The share of the latter rises to about one in three of the Danish visitors who booked accommodation stand-alone and 62% for those who booked a holiday (accommodation and travel combined).
- Almost three in five Danish respondents agreed in spring 2021, that they think booking through a travel agent is a safer option at the moment for limiting uncertaincies around trip planning. Amid the pandemic, bookings are left to the last minute by more than three in five Danes.

Please note that the information provided in this section reflects mainly the situation prior to the COVID-19 pandemic as fundamental market changes are still in progress.

Source: VisitBritain/IPSOS 2016; TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021

4.2 Travel trade: Danish tour operators

Top ten largest operators by turnover in Denmark (prior to the COVID-19 pandemic)

Largest operators in Denmark	Turnover DKK (000s)
American Express	3,147,076
Tumlare Corporation A/S	2,059,677
Spies A/S	1,680,759
Tui Danmark A/S	1,034,659
Albatros Travel A/S	786,610
Kilroy	657,876
Slopetrotter	649,824
Africa-Safari, Asia Tours, Lama Tours	386,408
Kilroy Group Travel A/S	237,990
Detur Denmark ApS	203,392
Fonden 65-Ferie	186,706
Club La Santa A/S	140,616
C&C Travel A/S	124,653
Unitas Rejser A/S	99,153
Kilroy Internaitonal A/S	67,442

Source: LargestCompanies.com; VisitBritain Office Sweden

Top intermediaries in the Nordic region

Top intermediaries in the Nordic region
Albatros Travel
Jörns Resor
KulturRejser Europa
Rolfs Flyg och Buss
Scandorama
Tema Resor
RK Travel (mainly SE/NO)
Gislev Rejser
FDM Rejser

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4.2 Travel trade: Danish holidays

National public holidays:

2021	National public holidays
1 January	New Year's Day
1 April	Maundy Thursday
2 April	Good Friday
5 April	Easter Monday
30 April	Big Prayer Day
13 May	Ascension Day
23 May	Pentecost Sunday
24 May	Whit Monday
24 December	Christmas Eve Day
25 December	Christmas Day
26 December	Second Day of Christmas

Date	Local/School Holiday	Area
Week 7	Winter Holiday	All but Nordjylland
Week 8	Winter Holiday	Nordjylland
Week 26-32	Summer Holiday	
Week 42	Autumn Holiday	

Source: Officeholidays.com

4.2 Travel trade: practical information

General practical information:

- Business hours are usually 08.30– 16:30. Lunch breaks are usually taken in the company canteens.
- When introduced expect to shake hands. Use first names rather than last names.
- Keep meetings short and have an agenda.
- Follow up quickly on any action points.
- Mid June to mid August can be difficult to arrange meetings/events etc due to summer school holidays and long vactions.
- The Danish generally speak excellent English – so language is not an issue.

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4.2 Travel trade: sales calls

Sales calls

The Danish trade structure is consolidated and closely connected. The big players are carriers and tour operators; 4 major charter tour operators dominate mainstream leisure travel, while the mid size and niche operators are more relevant for Britain. Therefore, before you embark on a sales visit to Denmark, VisitBritain recommends that you take the following steps:

- Danes are not used to hierarchy and tend to be quite informal, but this does not mean unprofessional.
- Danes are not used to 'the hard-sell', so a gentle, friendly approach will usually work better.
- Danes are generally perceived as being fairly quiet; they tend to listen and observe before commenting.
- Danes are generally in touch with British current affairs, humour and culture, so don't be afraid to bring it into a discussion.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Danish trade attend the VisitBritain's ExploreGB workshop & VisitScotland Expo. Please contact VisitBritain London for details of those attending. Some operators also visit World Travel Market and ITB.

4.3 Caring for the consumer

Advice on caring for Danish consumers

- Danish perceptions of and satisfaction with British food tend to be average but due to exposure through e.g. gastronomy shows they are aware of food trends in the UK and Danish visitors are often happy to try them.
- Breakfast in Denmark tends to be taken early and often is a continental breakfast, often rolls with cheese and ham. A cooked breakfast is something many Danes will enjoy while on holiday in Britain, but perhaps not every day.
- At home, lunch is usually a sandwich with a drink of some kind. A pub lunch is something many Danish visitors want to experience during a holiday visit.
- Dinner consists of a hot meal, with either a starter or a dessert followed by coffee or tea.
- Danes tend to like strong coffee and not being able to get decent coffee is often a source of complaint.
- Danes are comfortable with and used to paying with a credit card while in Britain.
- Cleanliness is very important. Danes are used to wooden or tiled floors. Budget accommodation can be fine, but they are likely to expect en-suite facilities.
- Danes often are price-conscious and tend to expect value for money and efficiency.
- Whilst many Danes have good command of English, signage and information in their native language can make them feel more welcome.

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Useful links and further information

Appendix

Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

Opportunity search or trade website

or contact the B2B events team
(Email: events@visitbritain.org)

or campaign partnerships team
(Email: partnerships@visitbritain.org)

or trade support team
(Email: tradesupport@visitbritain.org)

or VisitBritain shop team
(Email: product@visitbritain.org)

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Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our global and regional marketing campaigns.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

Business Recovery Webinars

DCMS's Tourism Recovery Plan

Appendix 1: Working with VisitBritain (3)

VisitBritain's global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit our page on understanding our customers.
- In Denmark, VisitBritain focuses on two audience segments among the international travellers:
    - **Buzzseekers in Denmark:** active, enjoy foreign cultures. Motivated by cultural attractions, ease of access, vibrant cities, and a variety of places to visit.
    - **Explorers in Denmark:** mature and open-minded with high interest in culture, arts and history. Enjoy a variety of holidays from seaside, lakes & mountains to gentle activities.

Segments (& global attributes)	Global market share	Market share in Denmark
Buzzseekers (free spirited and spontaneous, they like holidays full of action and excitement)	38%	20%
Explorers (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	24%
Adventurers (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	18%
Sightseers (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	15%
Culture Buffs (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	24%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest monthly, quarterly overall and quarterly by area data from the International Passenger Survey by ONS.
- Inbound Tourism Trends by Market
- Inbound activity data
- Inbound nation, region and country data
- Inbound town data
- Sector-specific research which includes topics such as accomodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- 2021 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about Denmark or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

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Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- COVID-19 consumer sentiment tracker
- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

To find out more about Denmark or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the 9 June 2021 update of the 'Global Travel Service' databank. Other information on Denmark and the Eurozone were updated 21 June 2021.
- **Apex** data was last updated with May 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, May 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Ipsos-Anholt Nation Brands Index** (NBI) was carried out online in July/August 2020 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

Market and Trade Profile: Denmark

July 2021

Destination Bristol ©Gary Newman