Market and Trade Profile: Denmark

Denmark
Overview

• **Chapter 1: Inbound market statistics** provides insights on key statistics about Danish travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Danish visitors in the UK.

• **Chapter 2: Understanding the market** takes a close look at Danish consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by Danes are also highlighted.

• **Chapter 3: Access and travel trade** shows how Danes 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.
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Chapter 1: Inbound market statistics
Chapter 1: Inbound market statistics

Chapter summary

• The Danish outbound market is forecasted to account for more than 11 million trips abroad with at least one overnight stay by 2020. The UK was the 5th most popular destination for such trips in 2016.

• Danes rank globally in 30th place for international tourism expenditure with US$9.2bn.

• Denmark was the 15th largest inbound source market for the UK for volume and 17th most valuable in 2016.

• The Danish source market has a good seasonal spread with Q4 (Oct-Dec) and Q2 (Apr-Jun) the strongest quarters for visits to the UK.

• 92% of departing Danish visitors are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short break.

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO, CAA 2016 based on leisure visitors

2016: £368m spend in UK
Chapter 1.1: Key statistics

Key insights

- Denmark is Britain’s 15th largest source market in terms of visits and 17th most valuable for visitor spending (2016).
- 42% of spending came from holiday trips and 27% from business visits in 2016.
- Holiday visits continue to lead in volume. Business visits from Denmark set a new record in 2016 with 197,000 visits for this journey purpose.
- London is the leading destination for a trip to Britain but the South East and Scotland are also popular (based on average nights spent in the UK in 2014-2016).
- The most popular activities undertaken by Danish travellers in Britain include dining in restaurants, shopping and going to the pub, visiting parks and gardens and visiting museums and art galleries.

Source: International Passenger Survey by ONS, Oxford Economics overnight trips
1.1 Key statistics: global context and 10 year trend

Global context

<table>
<thead>
<tr>
<th>Measure</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>International tourism expenditure (US$bn)</td>
<td>9.2</td>
</tr>
<tr>
<td>Global rank for international tourism expenditure</td>
<td>30</td>
</tr>
<tr>
<td>Number of outbound overnight visits (m)</td>
<td>10.0</td>
</tr>
<tr>
<td>Most visited destination</td>
<td>Germany</td>
</tr>
</tbody>
</table>

Inbound travel to the UK overview

<table>
<thead>
<tr>
<th>Measure</th>
<th>Visits (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>10 year trend</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>561</td>
<td>2,626</td>
<td>238</td>
</tr>
<tr>
<td>2008</td>
<td>560</td>
<td>2,602</td>
<td>236</td>
</tr>
<tr>
<td>2009</td>
<td>614</td>
<td>2,894</td>
<td>300</td>
</tr>
<tr>
<td>2010</td>
<td>550</td>
<td>2,883</td>
<td>245</td>
</tr>
<tr>
<td>2011</td>
<td>614</td>
<td>2,832</td>
<td>287</td>
</tr>
<tr>
<td>2012</td>
<td>636</td>
<td>2,830</td>
<td>303</td>
</tr>
<tr>
<td>2013</td>
<td>696</td>
<td>3,111</td>
<td>436</td>
</tr>
<tr>
<td>2014</td>
<td>662</td>
<td>2,646</td>
<td>295</td>
</tr>
<tr>
<td>2015</td>
<td>756</td>
<td>3,507</td>
<td>356</td>
</tr>
<tr>
<td>2016</td>
<td>730</td>
<td>3,689</td>
<td>368</td>
</tr>
<tr>
<td><strong>Share of UK total in 2016</strong></td>
<td>1.9%</td>
<td>1.3%</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

*Source: International Passenger Survey by ONS, UNWTO, Oxford Economics*
## 1.1 Key statistics – volume and value

### Inbound volume and value

<table>
<thead>
<tr>
<th>Measure</th>
<th>2016</th>
<th>Change vs. 2015</th>
<th>Rank out of UK top markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>730</td>
<td>-3%</td>
<td>15</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>3,689</td>
<td>5%</td>
<td>16</td>
</tr>
<tr>
<td>Spend (£m)</td>
<td>368</td>
<td>4%</td>
<td>17</td>
</tr>
</tbody>
</table>

### Nights per visit, spend

<table>
<thead>
<tr>
<th>Averages by journey purpose in 2016</th>
<th>Nights per visit</th>
<th>Spend per night</th>
<th>Spend per visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>4</td>
<td>£115</td>
<td>£511</td>
</tr>
<tr>
<td>Business</td>
<td>2</td>
<td>£203</td>
<td>£499</td>
</tr>
<tr>
<td>Visiting Friends/Relatives</td>
<td>6</td>
<td>£53</td>
<td>£340</td>
</tr>
<tr>
<td>All visits</td>
<td>5</td>
<td>£100</td>
<td>£505</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS
1.1 Key statistics: journey purpose

Journey purpose 2016

- In 2016, 42% of all visits to the UK from Denmark were made for holiday purposes, followed by 27% of business visits.
- 78% of holiday visits from Denmark to the UK in 2015 (excl. UK nationals) were made by repeat visitors. These repeat visitors came on average between three and four times in the past ten years (a high visit frequency) and spent £1,888 in the UK in total whilst the average European holiday repeat visitor spent £1,626 in the same time frame.

Journey purpose trend (visits 000s)

- Holidays continue to lead in terms of volume of visits and in visitor spending. In 2016, 42% of spending came courtesy of holiday visitors, 27% from business visits and 15% from visits to friends and/or relatives.
- Business visits from Denmark set a new record for volume in 2016 with 197,000 visits. Spend by business visitors was £98m, the third highest year and not far off the peaks in 2012 and 2013.
- 92% of Danish residents coming to the UK (excl. expats) for business visits had been to the UK before as had 90% of those coming to visit friends or relatives who live in the UK.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015
1.1 Key statistics: seasonality

In 2016, 27% of visits from Denmark to the UK were made in the last quarter, closely followed by 26% between April and June. The summer quarter, which is high season for many other markets, saw a below average share of Danish visits with 24%. 23% of visits from Denmark were made in the first quarter.

Looking at the seasonality trend over time, there have been fluctuations in visits over the years but the second and last quarters seem to have followed a similar pattern for volume of visits. The volume of visits in the summer quarter, which had peaked in 2015, has fallen back behind the latter quarters in 2016.
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2016 (nights, % share)

- Bed & Breakfast: 33%
- Holiday village/Centre: 42%
- Hotel/guest house: 13%
- Free guest with relatives or friends: 6%
- Hostel/university/school: 3%
- Other: 2%
- Paying guest family or friends house: 1%
- Camping/caravan: 1%

**Duration of stay trend (visits 000s)**

- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Danes visiting the UK.
- Two forms of accommodation dominate the picture with 42% of Danish visitor nights spent in UK at a ‘hotel/guest house’ and a third spent staying for free with relatives or friends. Hostel/university/school accommodation accounted for 13% of Danish visitor nights in 2016.

*Source: International Passenger Survey by ONS*
### 1.1 Key statistics: regional spread

#### Visits to the UK in (2014-2016 average)

<table>
<thead>
<tr>
<th>Region</th>
<th>Nights stayed (000)</th>
<th>Visits (000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>3,281</td>
<td>716</td>
</tr>
<tr>
<td>Scotland (SC)</td>
<td>370</td>
<td>66</td>
</tr>
<tr>
<td>Wales (WA)</td>
<td>51</td>
<td>12</td>
</tr>
<tr>
<td>Northern Ireland (NI)</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>London (LDN)</td>
<td>1,430</td>
<td>392</td>
</tr>
<tr>
<td>North East (NE)</td>
<td>120</td>
<td>13</td>
</tr>
<tr>
<td>North West (NW)</td>
<td>137</td>
<td>42</td>
</tr>
<tr>
<td>Yorkshire (YO)</td>
<td>92</td>
<td>17</td>
</tr>
<tr>
<td>West Midlands (WM)</td>
<td>170</td>
<td>26</td>
</tr>
<tr>
<td>East Midlands (EM)</td>
<td>47</td>
<td>13</td>
</tr>
<tr>
<td>East of England (EoE)</td>
<td>207</td>
<td>46</td>
</tr>
<tr>
<td>South West (SW)</td>
<td>167</td>
<td>33</td>
</tr>
<tr>
<td>South East (SE)</td>
<td>476</td>
<td>73</td>
</tr>
<tr>
<td>Nil nights (Nil)</td>
<td>N/A</td>
<td>36</td>
</tr>
</tbody>
</table>

**Source:** International Passenger Survey by ONS
1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited

<table>
<thead>
<tr>
<th>Town</th>
<th>Visits (000s, 2012-2016 average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>376</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>38</td>
</tr>
<tr>
<td>Manchester</td>
<td>20</td>
</tr>
<tr>
<td>Liverpool</td>
<td>14</td>
</tr>
<tr>
<td>Aberdeen</td>
<td>11</td>
</tr>
</tbody>
</table>

Regional spread (2014-2016)

- London is the leading destination for a trip to Britain, accounting for 44% of visitor nights, but South East and Scotland are also popular based on the average nights spent in the UK in 2014-2016.
- Danes have a below average propensity to visit rural and coastal areas of Britain.
- Most of Danish visits (94%) were organised independently in 2016. 6% of visits from Denmark were bought as part of a package or an all-inclusive tour which is less than the all-market average (please note ONS definition of package holiday on page 16).
- Danish visitors tend to be comfortable with using public transport with an above-average proportion using public transport during their stay in the UK.
- 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
1.1 Key statistics: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

Source: International Passenger Survey by ONS 2016
1.1 Key statistics: use of internal modes of transport

Propensity to use internal modes of transport

Source: International Passenger Survey by ONS, 2013
1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)

Proportion of visits that are bought as part of a package or all-inclusive tour (2016)

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

To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.
1.2 Visitor demographics

Visitor characteristics

• Danish business visitors are about three times as likely to be male than female.
• Most visits from Danish residents to the UK were made by Danish nationals (84%), 7% by British nationals.
• Almost four-in-five Danish holiday visitors (excl. UK nationals) are making a repeat visit to Britain.
• 92% of departing Danish travellers are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.
• 87% of departing Danes felt ‘Very’ or ‘Extremely’ welcome in Britain.

Source: International Passenger Survey by ONS, CAA 2016 based on leisure visitors
1.2 Visitor demographics: gender and age groups

**Visitor demographics:**

gender ratio of visits from Denmark:
49% female, 51% male

**Age group trend**

**Female (% share of visits by journey purpose)**

<table>
<thead>
<tr>
<th></th>
<th>Business</th>
<th>Holiday</th>
<th>VFR</th>
<th>Misc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>26%</td>
<td>56%</td>
<td>63%</td>
<td>40%</td>
</tr>
<tr>
<td>All markets</td>
<td>20%</td>
<td>51%</td>
<td>56%</td>
<td>42%</td>
</tr>
</tbody>
</table>

**Male (share of visits by journey purpose)**

<table>
<thead>
<tr>
<th></th>
<th>Business</th>
<th>Holiday</th>
<th>VFR</th>
<th>Misc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>74%</td>
<td>44%</td>
<td>37%</td>
<td>60%</td>
</tr>
<tr>
<td>All markets</td>
<td>80%</td>
<td>49%</td>
<td>44%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS
1.2 Visitor demographics: origin

Visits to the UK in (000) 2013

- The largest proportion of Danish visitors to Britain reside in the region Hovedstaden which includes Copenhagen.
- The areas in Denmark with the most inhabitants are coastal areas, particularly in Copenhagen and the Eastern parts of Denmark’s mainland. This explains the smaller share of visitors sourced from other areas.

Visits in 000s | % share of visits

- High
- Medium
- Low

Source: International Passenger Survey by ONS, CIA World Factbook 2017
1.2 Visitor demographics: welcome and recommending Britain

Feeling of ‘welcome’ in Britain

<table>
<thead>
<tr>
<th>Feeling</th>
<th>Denmark</th>
<th>All Markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely welcome</td>
<td>45%</td>
<td>39%</td>
</tr>
<tr>
<td>Very welcome</td>
<td>49%</td>
<td>42%</td>
</tr>
<tr>
<td>Quite welcome</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Not very welcome</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Not at all welcome</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Likelihood to recommend Britain

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Denmark</th>
<th>All Markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely likely</td>
<td>49%</td>
<td>45%</td>
</tr>
<tr>
<td>Very likely</td>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>Quite likely</td>
<td>45%</td>
<td>9%</td>
</tr>
<tr>
<td>Not very likely</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Not at all likely</td>
<td>9%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: CAA 2016; asked to leisure visitors
1.3 Britain and competitors

Market size, share and growth potential

• Britain was the 5th most visited destination by Danish travellers in 2016, behind Sweden, Germany, Spain and Italy, and ahead of France.

• Forecasts suggest there is the potential for more than 40% growth in the number of Danish outbound overnight trips by 2025. The number of visits to Britain is also forecasted to grow by a third over the next decade.

• Sweden held a third of the share of Danish arrivals and remained the most travelled to destination in 2016. Within the competitor set, Italy and Germany have seen the strongest growth in Danish market share since 2011.

• 53% of Danes took domestic summer holidays in 2016.

Source: Oxford Economics (outbound overnight trips), VisitBritain/IPSOS 2016, Jyllands Posten 1 June 2016
1.3 Britain and competitors

Britain’s market share of Danish visits among competitor set

Historic and potential Danish visits to Britain (000s)

Source: Oxford Economics, outbound overnight visits
1.4 Inbound activities

Inbound Britain activities

• Shopping is one of the most popular activities featuring in many Danish visits.

• Three out of four Danish visitors dine in a restaurant and 44% visit a pub in Britain. One in three like to socialise with locals.

• Half of holiday visits involve time in a park or garden and more than one in four of them include walks in the countryside.

• Built heritage sites, and especially museums, are important attractions for many visitors with 43% of Danish holidays in Britain featuring a visit.

• More than 34,000 visits per annum feature time watching football.

• 21% Danish holiday visits went to the theatre, opera, musical or ballet while in Britain in 2016, slightly above average.

Source: International Passenger Survey by ONS, icons based on 2011 and 2016
1.4 Inbound activities

Propensity to visit museums and galleries

<table>
<thead>
<tr>
<th></th>
<th>Denmark</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>Holiday</td>
<td>43%</td>
<td>48%</td>
</tr>
<tr>
<td>All journey purposes</td>
<td>26%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Propensity to visit built heritage sites

<table>
<thead>
<tr>
<th></th>
<th>Denmark</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR: visited religious buildings</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>VFR: visited castles/historic houses</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Holiday: visited religious buildings</td>
<td>26%</td>
<td>35%</td>
</tr>
<tr>
<td>Holiday: visited castles/historic houses</td>
<td>43%</td>
<td>48%</td>
</tr>
<tr>
<td>All journey purposes: visited religious buildings</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>All journey purposes: visited castles/historic houses</td>
<td>25%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS 2016
1.4 Inbound activities

Propensity to attend the performing arts

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Denmark</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>All journey purposes</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>VFR: Theatre</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Holiday: Theatre</td>
<td>21%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Number who watched live football during their trip (000s)

- **Football**
  - **Holiday**: 6.8
  - **Business**: 3.9
  - **VFR**: 1.8
  - **Misc.**: 21.9

Source: International Passenger Survey by ONS 2011 and 2016
1.4 Inbound activities

Propensity to go for a walk

- Holiday: Walking along the coast
  - Denmark: 9%
  - All markets: 11%
  - 26%

- Holiday: Walking in the countryside
  - Denmark: 6%
  - All markets: 5%
  - 26%

- Business: Walking along the coast
  - Denmark: 1%
  - All markets: 1%
  - 11%

- Business: Walking in the countryside
  - Denmark: 8%
  - All markets: 11%
  - 22%

- VFR: Walking along the coast
  - Denmark: 8%
  - All markets: 11%
  - 28%

- VFR: Walking in the countryside
  - Denmark: 6%
  - All markets: 8%
  - 18%

- All journey purposes: Walking along the coast
  - Denmark: 6%
  - All markets: 8%
  - 18%

- All journey purposes: Walking in the countryside
  - Denmark: 9%
  - All markets: 11%
  - 26%

Propensity to visit a park or garden

- VFR: Visiting parks or gardens
  - Denmark: 26%
  - All markets: 32%

- Holiday: Visiting parks or gardens
  - Denmark: 50%
  - All markets: 50%

- All journey purposes: Visiting parks or gardens
  - Denmark: 30%
  - All markets: 32%

1.4 Inbound activities

Propensity to go to restaurants, pubs, night clubs and socialise with locals

Propensity to purchase selected items (%)

- None of these
- Other holiday souvenir (not mentioned...)
- Items for your home e.g. furnishing
- Electrical or electronic items e.g. camera
- CDs, DVDs, computer games etc
- Food or drink
- Games, toys or gifts for children
- Books or stationery
- Cosmetics or toiletries e.g. perfume
- Bags, purses etc
- Personal accessories e.g. jewellery
- Clothes or Shoes

Chapter 2: Understanding the market
2. Understanding the market

Chapter summary

• Denmark has a population of about 6 million.
• Whilst 16% of Danes did not take overnight trips away from home in 2015, it is very common for the majority to go on more than one such trip, indicating that travel is important to them.
• About two in five Danish holiday visitors tend to start thinking about their trip to Britain as early as half a year in advance or more.
• 39% of holiday bookings to Britain were made within two months of arrival and 40% booked between three to six months prior to arrival.
• Friends, family and colleagues are by far the most important influence on the holiday destination choice.

2.1 Structural drivers

Demographics & society

- Population of about 6 million.
- Denmark is a parliamentary constitutional monarchy.
- 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 Denmark’s 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 expect 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.

Source: Oxford Economics, CIA World Factbook 2017
## 2.1 Structural drivers: population and economic indicators

### Population dynamics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2016 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population</td>
<td>5,721,000</td>
</tr>
<tr>
<td>Median age</td>
<td>42</td>
</tr>
<tr>
<td>Average annual rate of population change in 2015 - 2020</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

### Economic indicators

<table>
<thead>
<tr>
<th>Indicator (annual growth rate)</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP</td>
<td>1.7%</td>
<td>2.3%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Consumer spending</td>
<td>2.1%</td>
<td>2.3%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Unemployment rate</td>
<td>4.2%</td>
<td>4.4%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Average earnings</td>
<td>0.7%</td>
<td>4.7%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Consumer prices</td>
<td>0.3%</td>
<td>1.3%</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

*Source: Oxford Economics, CIA World Factbook 2017*
2.1 Structural drivers: general market overview

General market conditions

- Denmark was Britain’s 15th largest source market in terms of visits and 17th most valuable for visitor spending in 2016.
- The Danish economy is expected to have grown slightly slower than expected in the second half of 2017 but still posts the strongest results in more than a decade. Consumer confidence continues to be above the long-term average. Real GDP is forecasted to grow by 1.9% in 2018. (Oxford Economics)
- The country has a population of about 6 million with a median age of 42.
- 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$43,700, above the Eurozone average and forecasted to increase in the years to come.
- Exchange rate: comparing November 2015, when GBP was very strong vs. DKK, and November 2017, the cost of GBP was 21% more affordable for Danish visitors to the UK.

Key demographic and economic data

<table>
<thead>
<tr>
<th>Measure (2016 data)</th>
<th>Denmark</th>
<th>Eurozone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (m)</td>
<td>5.7</td>
<td>336.8</td>
</tr>
<tr>
<td>GDP per capita PPP (US$)</td>
<td>43,712</td>
<td>38,187</td>
</tr>
<tr>
<td>Annual average GDP growth over past decade (%)</td>
<td>0.5</td>
<td>0.6</td>
</tr>
<tr>
<td>Annual average GDP growth in 2017 (%)</td>
<td>2.3</td>
<td>2.3</td>
</tr>
</tbody>
</table>

2.1 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 at visitbritain.org/visitor-economy-facts.

Source. Bank of England
2.2 Consumer trends

- 53% of Danes took domestic summer holidays in 2016.
- The majority of Danes book their holidays online and are familiar with e-commerce, especially the younger age groups.
- Danish travellers are very individualist and only 5% of Danes prefer to travel in groups. 52% prefer “urban trips” when finding a travel destination.
- Danes tend to be conservative and habitual when it comes to choosing holiday destinations. Many prefer to return to destinations they feel they know. This is particularly true for families with children.
- The sharing economy is a growing trend in Denmark, in line with other European markets, and the Danes are familiar with companies like AirBnB and Uber.

No. 1
London is the most popular city destination among Danes (2016)

2.2 Consumer trends: overall travel trends

Travel trends

• Danes have increased their spending on summer holidays with an average of £1,775 being spent on them.
• 48% of Danes have holidayed alone, and Danes are generally very independent travellers.
• Direct flights are a priority for Danes when looking for and booking a holiday.
• 39% of Danes want to take an "city break" holiday, London is the most popular city travel destination for Danes.
• Danes are most likely to make the booking for their summer holidays in January and February.
• Searches for short holidays of less than 5 days have increased greatly as a result of cheap flights. UK is one of the top destinations for shorter breaks.
• Danes put importance on “flexibility” of travel dates.
• Danes have an increasing tendency to look for “adventure” compared to a decade ago.

• In 2016, 50% of Danes who travelled to Britain travelled with their spouse/partner, 24% with other adult family members, 21% with friends, 12% on their own and 14% with children under 16.
• Traditional charter holidays are in decline in the Danish source market with most Danes now organising their trips independently.

Source: Primera Travel Group, Momondo, Thomas Cook, Aarhus Airport, Greens Analyseinstitut, Nordea
2.2 Consumer trends: motivation and attitudes to holidays

Number of overnight trips away from home for all journey purposes (%)

Motivation and attitudes to holidays
- The majority of Danes said that they were unlikely to amend their holiday plans due to the economic situation (74%) and only 10% said that they go on holidays in 2016 but were likely to spend less (Flash Eurobarometer 432 by EC). This shows a much lower impact than the European average.
- The use of the sharing economy is a growing trend in Denmark in line with other European markets. The Danes are familiar with companies like AirBnB and Uber and price is the main reason to choose these services. Uber has, however, been banned in Denmark which could impact the readiness to use the company's services abroad.

Source: Flash Eurobarometer 432 by EC 2016: During 2015, how many times did you travel for professional or personal reasons where you were away from home for a minimum of one night?, Danmarks Radio 3 August 2017

- Whilst 16% of Danes did not take overnight trips away from home, it is very common for the majority to go on more than one such trip.
2.2 Consumer trends: reasons for holidays

Main reasons for going on holiday (%)

- Amongst the main reasons for going on a holiday for Danish travellers are: sun/beach, visiting family/friends/relatives, nature and culture followed by city trips.

Reasons to return to the same destination for a holiday

- Asked for reasons which would make them come back, 45% of Danes value natural features and about two in five stated cultural and historical attractions, followed by the quality of the accommodation and the activities/services available.

Source: Flash Eurobarometer 432 by EC 2016: What were your main reasons for going on holiday in 2015? Firstly? And then? and Which of the following would make you go back to the same place for a holiday? Firstly? And then?
2.3 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.
• Danes tend to book their trip further in advance than many other visitors. Compared to the all-market average, 10% fewer make 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 the booking over the phone and only 4% face-to-face.

Source: VisitBritain/IPSOS 2016
2.3 Booking and planning: booking channels and ticket sales

How trips to Britain were booked

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

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. Tickets / passes for other tourist attractions are by some distance the mostly likely to be purchased here.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)
2.3 Booking and planning: lead-times

- Almost two in five Danish visitors 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.
- 69% made their decision to travel to Britain at least three months prior to the actual journey.
- 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 separately booked their transport 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.

Source: VisitBritain/IPSOS 2016, base: visitors
2.4 Reaching the consumer and perceptions of Britain

- The most influential information source for Danes when making a holiday destination choice is, by far, 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 online sources are popular for researching and making a destination choice, about one in five Danes state that they also consult a travel guidebook, travel features and special deals in magazines, newspapers or on TV.

- About 80% of Danes watch an average of 2 hours of TV per day (below the European average) and 92% of Danes tune in to the radio.

*Sources: VisitBritain/IPSOS 2016 (adjusted data), DR Medieforskning*
2.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- Public service television Danmarks Radio broadcasts through 6 main channels: DR1, DR2 (Documentary), DR3 (Young Adult), DRK (Culture), DRUltra (Teens) and DRRamasjang (Children), which make up about 36% of the Danish television market.
- Main commercial TV channels: TV2 (37% market share in 2016), MTG (10%), Discovery Networks (10%).
- About 80% of all Danes watch television daily (average of 2.5 hours). Compared to other European countries, Danes spend less time watching traditional television.

Radio

- Danmarks Radio is the dominant player with 75% 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.
- On average, 92% of the population tune in to the radio – whilst this proportion has been stable, the average time spent listening has declined to a daily average of 2 hours in 2016. Potential reasons are music streaming services such as Spotify and digital consumption (Podcast format).

Newspapers

- 46% of adults in Denmark read at least one newspaper a day, a number in steep decline with only 17% of people under 30 reading print.
- There are about 120 printed papers in Denmark, almost all with an online edition. Roughly 80 are published only once or twice a week with a low circulation.
- 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/week include local papers in the metropolitan areas and small regional and local papers.
- Freely distributed newspapers: around 100, distributed often on weekly basis, the biggest is MX distributed 5x/week. (Now part of BT as BTMX).
- Many of the newspapers have travel sections e.g. Politiken publishes a travel section every Saturday.

Sources: DR Medieforskning, TNS Gallup, Danmarks Statistik
2.4 Reaching the consumer: magazines and online media

**Magazines**

- Many Danish magazines are beginning to transform from paper based to digital with applications such as Flipp, Pling and Wype providing a digital subscription model to read magazines and periodicals on digital devices.
- Aller is the largest conglomerate of magazines with a 71% market share on weekly magazines and a 22% share on monthly editions. 2.6 million Danes read an Aller magazine once a month. Other big players are Egmont and Benjamin.
- 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 now seen as the most important information source for Danes ahead of TV, daily newspapers and radio.
- Social Media: 64% of Danes use Facebook daily, with the numbers increasing as well for Snapchat (19%), Instagram (17%) and Twitter (5%) amongst others.
- Mobile Internet: Since 2011, the split between people using their PC and mobile for internet usage has changed dramatically. From a 72%:20% PC:mobile split, now 65% of Danes use a PC and 64% use a mobile phone for Internet browsing.
- Streaming gaining steam: In 2016, 2 out of 5 Danes streamed entertainment weekly. The young especially prefer Youtube over traditional TV with 80% of 15-29 year olds watching the service every day (65% for streaming and 52% for traditional TV).
- Social Media becoming a news source: 56% of 12-29 year old gets their news from Facebook, ranking it ahead of radio, web and newspapers.

*Sources: Aller, Bladkiosken.dk, DR Medieforskning*
2.4 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, Youtube, Google+, Instagram, Snapchat and Twitter.

- 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 the survey. More than one in three like to keep in touch with 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)?
2.4 Reaching the consumer: influences

Influences on destination choice

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)
2.4 Perceptions of Britain: motivations

Motivations for choosing Britain as a holiday destination

Source: VisitBritain/IPSOS 2016, 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)
Chapter 3:
Access and travel trade
3. Access and travel trade

- Access to Britain is easy. 96% of Danish visits arrive by plane.
- Airline seat capacity from Denmark has increased sharply over the last few years leading up to 2016 and most flights come in via the Copenhagen – London corridor.
- SAS and easyJet accounted for almost half of the annual seat capacity between Denmark and Britain in 2016, closely followed by Ryanair, and then British Airways and Norwegian Air International.
- 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 Rdc 2016
3.1 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 where in the UK the flight goes to.
- Annual seat capacity has increased sharply over the last few years leading up to 2016.
- Most flights come in through the Copenhagen – London corridor.
- SAS and easyJet accounted for almost half of the annual seat capacity between Denmark and Britain in 2016, closely followed by Ryanair, and then British Airways and Norwegian Air International.
- Danish visitors departing Britain by air pay £13 in Air Passenger Duty.
- A very small proportion of Danish inbound visits came to the UK via the Channel Tunnel or across the sea in 2016.

Source: International Passenger Survey by ONS, Apex RdC 2016, non-stop flights only
3.1 Access: mode of transport

Visits by mode of transport

Origin airport annual seat capacity

Annual share by mode (2016)

Source: International Passenger Survey by ONS, Apex Rd, non-stop flights only
3.1 Access: capacity

Destination airport annual seat capacity

- London - Heathrow (28%)
- London - Gatwick (21%)
- London - Luton (19%)
- London - Stansted (9%)
- Birmingham International (6%)
- Other* (2%)

Source: Apex RdC 2016: non-stop flights only

Origin airport annual seat capacity

- Copenhagen (88%)
- Billund (9%)
- Aarhus (2%)
- Other** (1%)

*Other destination airports with less than 2% annual seat share grouped in other: Newcastle, Bristol, London City, Humberside, Jersey, East Midlands, London Southend, Leeds/Bradford
**Other origin airports with less than 2% annual seat share grouped in other: Aalborg, Esbjerg, Karup, Odense - Beldringe
3.1 Access: capacity

Airline seat capacity by carrier (2016)

- SAS: 26%
- easyJet: 16%
- Ryanair: 13%
- British Airways: 23%
- Norwegian Air International: 2%
- Norwegian: 1%
- Other: 2%

Source: Apex Rdcs 2016: non-stop flights only
3.2 Travel trade: general overview

- 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.
- 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).

Source: VisitBritain/IPSOS 2016, base: visitors
### 3.2 Travel trade: Danish tour operators

**Top ten operators in Denmark in 2015/2016**

<table>
<thead>
<tr>
<th>Top Ten Travel Operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spies/Thomas Cook</td>
</tr>
<tr>
<td>Kilroy International</td>
</tr>
<tr>
<td>Amex Global Business Travel</td>
</tr>
<tr>
<td>Primera Travel/Bravo Tours</td>
</tr>
<tr>
<td>FDM Travel</td>
</tr>
<tr>
<td>Vitus Rejser</td>
</tr>
<tr>
<td>Stjernegaard</td>
</tr>
<tr>
<td>Bengt-Martins</td>
</tr>
<tr>
<td>Kipling Travel</td>
</tr>
<tr>
<td>Detur</td>
</tr>
</tbody>
</table>

**TOP intermediaries in the Nordic region**

<table>
<thead>
<tr>
<th>Top intermediaries in the Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>KulturRejser (SE/DK)</td>
</tr>
<tr>
<td>Albatros Travel</td>
</tr>
<tr>
<td>Airtours (SE)</td>
</tr>
<tr>
<td>TEMA Resor (Jambo Tours)</td>
</tr>
<tr>
<td>RK Travel (mainly SE/NO)</td>
</tr>
<tr>
<td>eTraveli</td>
</tr>
<tr>
<td>Apollo Travel Group</td>
</tr>
<tr>
<td>Jörns Resor</td>
</tr>
</tbody>
</table>
3.2 Travel trade: Danish holidays

Public holidays

National public holidays in 2018

<table>
<thead>
<tr>
<th>Date</th>
<th>National Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 January</td>
<td>New Year’s Day</td>
</tr>
<tr>
<td>29 March</td>
<td>Maundy Thursday</td>
</tr>
<tr>
<td>30 March</td>
<td>Good Friday</td>
</tr>
<tr>
<td>1 April</td>
<td>Easter Sunday</td>
</tr>
<tr>
<td>2 April</td>
<td>Easter Monday</td>
</tr>
<tr>
<td>27 April</td>
<td>Big Prayer Day</td>
</tr>
<tr>
<td>10 May</td>
<td>Ascension Day</td>
</tr>
<tr>
<td>20 May</td>
<td>Pentecost Sunday</td>
</tr>
<tr>
<td>21 May</td>
<td>Pentecost Monday</td>
</tr>
<tr>
<td>25 December</td>
<td>Christmas Day</td>
</tr>
<tr>
<td>26 December</td>
<td>Second Day of Christmas</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Local/School Holiday</th>
<th>Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 7</td>
<td>Winter Holiday</td>
<td>All but Nordjylland</td>
</tr>
<tr>
<td>Week 8</td>
<td>Winter Holiday</td>
<td>Nordjylland</td>
</tr>
<tr>
<td>Week 26-32</td>
<td>Summer Holiday</td>
<td></td>
</tr>
<tr>
<td>Week 42</td>
<td>Autumn Holiday</td>
<td></td>
</tr>
</tbody>
</table>
3.2 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 vacations.
- The Danish generally speak excellent English – so language is not an issue.

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.

- 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.
3.3 Caring for the consumer

Caring for the consumer

- 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.

Language basics

<table>
<thead>
<tr>
<th>English</th>
<th>Danish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please</td>
<td>Vær så venlig / må jeg bede om</td>
</tr>
<tr>
<td>Thank you</td>
<td>Tak</td>
</tr>
<tr>
<td>Yes</td>
<td>Ja</td>
</tr>
<tr>
<td>No</td>
<td>Nej</td>
</tr>
<tr>
<td>Sorry! (apology)</td>
<td>Undskyld</td>
</tr>
<tr>
<td>Excuse me!</td>
<td>Undskyld mig</td>
</tr>
<tr>
<td>Sorry, I do not speak Danish.</td>
<td>Jeg taler ikke dansk</td>
</tr>
</tbody>
</table>

Source. International Passenger Survey by ONS 2016
3.3 Caring for the Consumer

Caring for the Consumer:
- Danish perceptions of and satisfaction with British food tend to be on 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 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.
# 3.3 Caring for the consumer: Danish language tips

## Language tips for arrival and departure

<table>
<thead>
<tr>
<th>English</th>
<th>Danish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hello</td>
<td>Hej (informal) or Goddag</td>
</tr>
<tr>
<td>My name is…</td>
<td>Mit navn er</td>
</tr>
<tr>
<td>Welcome to Britain</td>
<td>Velkommen til Storbritannien</td>
</tr>
<tr>
<td>Pleased to meet you!</td>
<td>Det glæder mig at møde dig</td>
</tr>
<tr>
<td>How are you?</td>
<td>Hvordan går det?</td>
</tr>
<tr>
<td>Enjoy your visit!</td>
<td>Nyd jeres besøg</td>
</tr>
<tr>
<td>Goodbye</td>
<td>Farvel</td>
</tr>
<tr>
<td>Did you enjoy your visit?</td>
<td>Nød I jeres besøg?</td>
</tr>
<tr>
<td>Have a safe journey home!</td>
<td>Hav en god rejse hjem</td>
</tr>
<tr>
<td>Hope to see you again soon!</td>
<td>Håber vi snart ses igen</td>
</tr>
</tbody>
</table>
3.4 Working with VisitBritain

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 hosting our journalists and broadcast crew.
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory.
- Print advertising in targeted media/Britain supplements.
- Retailing your product through the VisitBritain shop.
- 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 (visitbritain.org/opportunities) or trade website (trade.visitbritain.com) 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)
3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data
  visitbritain.org/latest-quarterly-data-uk-overall
  visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specific-research
- 2017 Inbound Tourism Forecast visitbritain.org/forecast
- Britain’s competitiveness visitbritain.org/britains-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 pages or (visitbritain.org/markets-segments)
our inbound research & insights or (visitbritain.org/inbound-research-insights)
contact us directly (Email: research@visitbritain.org)
3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain visitbritain.org/understanding-international-visitors
- Technology and social media visitbritain.org/understanding-international-visitors
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more visitbritain.org/visitor-characteristics-and-behaviour

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 pages or (visitbritain.org/markets-segments) our inbound research & insights or (visitbritain.org/inbound-research-insights) contact us directly (Email: research@visitbritain.org)