A photograph of a busy street scene in a European city, likely Copenhagen, with people walking and shopping. The street is paved with cobblestones and lined with buildings. A woman in a white blazer and red dress is prominent in the foreground. The text "The French Potential Results from VisitDenmark's Image and Potential Analysis 2017" is overlaid in white.

The French Potential Results from VisitDenmark's Image and Potential Analysis 2017

The French Potential

Results from VisitDenmark's Image and Potential Analysis in Paris 2017

Published by
VisitDenmark
October 2017

ISBN: 978-87-93227-28-6
Front page: DenmarkMediaCenter

Address

Islands Brygge, 43, 3.
2300 København S
Phone: +45 32 88 99 00

Contact

Kirstine Tolstrup Nielsen
ktn@visitdenmark.com

www.visitdenmark.dk/analyse

Contents

New information about the French market

France is the eight-largest foreign market for Danish tourism, measured in overnight stays. Growing numbers of Frenchmen have visited Denmark over the past few years and this increase in French tourists is expected to continue in 2017. Since 2008, French overnight stays have grown by a stunning 82%.

This report contains new information concerning French people's travel behaviour, holiday plans and overall knowledge of Denmark with the intention of providing insights to a stronger promotion of Denmark in France. France has been one of VisitDenmark's priority markets since 2008, and since then our focus has been on cultivating partners (tourism and non-tourism partners), Travel Trade and the press.

Copenhagen is the main destination in Denmark for French tourists, which is why this report naturally focuses on the potential of attracting more French city-tourists. The French market is processed from VisitDenmark's Italian market division. Besides attracting French city-tourists, VisitDenmark also works on initiatives creating an interest for Danish coastal and nature tourism in the French press. Because as it happens, the French also seek out the northern European countries for those special nature experiences.

Behind the report

This report is based on VisitDenmark's annual Image and Potential Analysis, which for the first time has been carried out in France. A total of 1,024 web interviews have been conducted in Paris with a representative cross-section of the city's population over 18 years of age. The data collection was carried out in March and April, 2017. As an indicator, the statistical uncertainty in the overall results of the survey lies at +/- 1,2 percentage points.

Contents

Main results	3
The French Travel market	
Number of overnight stays in Denmark and Northern Europe	4
The Market for Holiday Travel in Paris	8
Denmark's Potential 2017	11
Knowledge of Denmark as a holiday destination	17
Experience and associations	

Key figures

French tourists in Denmark

245,000
overnight stays in 2016

+33,000
additional overnight stays
compared to 2015

+15.5%
growth compared to 2015

+4-6%
expected growth in 2017

74%
of all overnight stays are in
Copenhagen

Paris

4% expect going on holiday to
Denmark in 2017, which amounts
to **100,000 tourists**

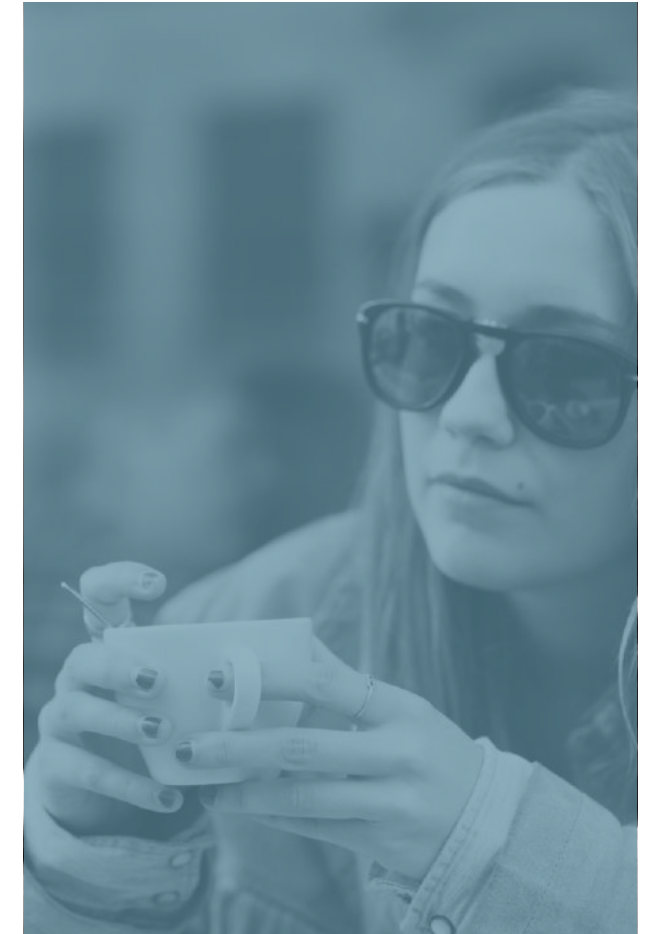
3% went on holiday to Denmark
in 2016.

Copenhagen is **no. 15** on the list
of potential cities for a city break
in 2017

6% know a great deal about
Denmark as a holiday destination

10% know a great deal about
Copenhagen as a holiday
destination

72% have never been on holiday
to Denmark



A modern bedroom with a large window, a bed, and a small table. The room is bright and airy, with a view of a cityscape through the window. The text is overlaid on the image.

The French Travel Market

French overnight stays in Denmark and Northern Europe

French overnight stays in Denmark

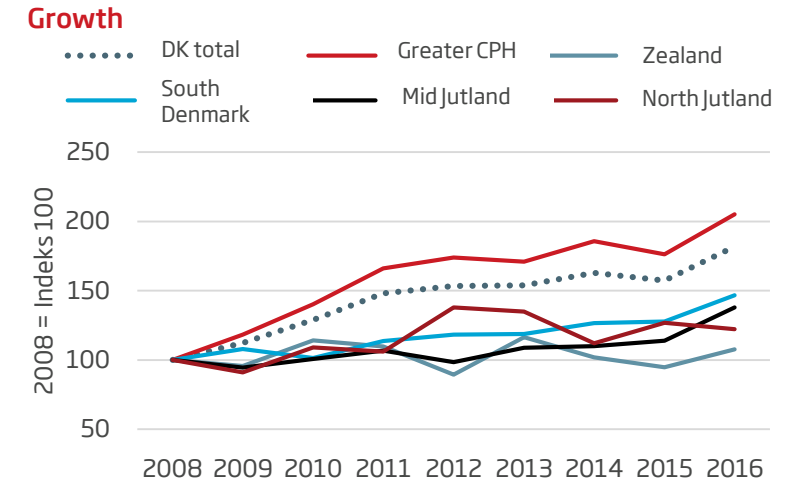
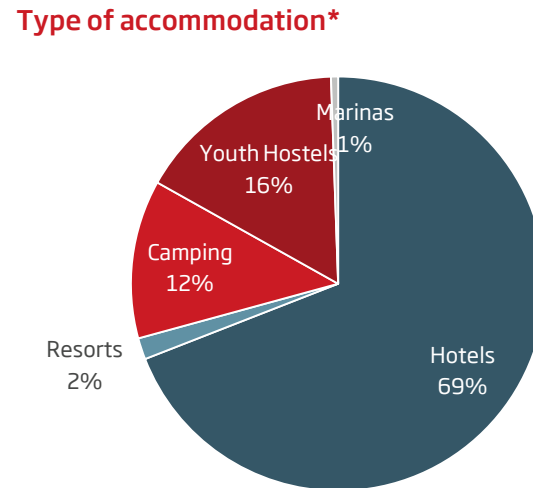
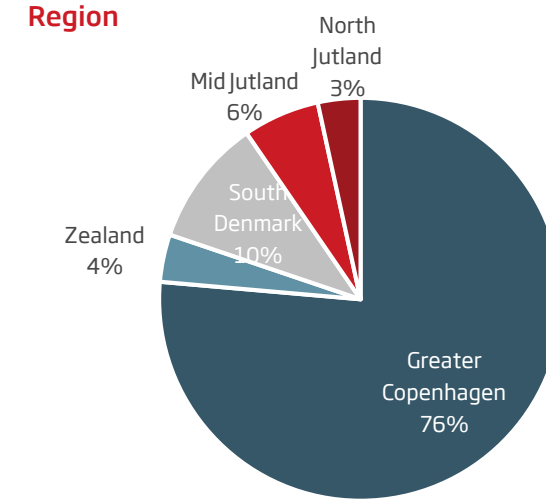
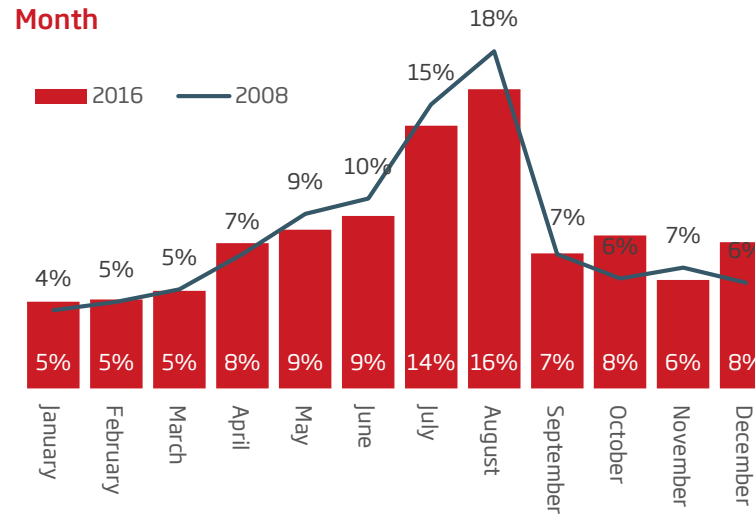
The typical French tourist goes on summer holidays in Copenhagen

In 2016, French tourists spent 245,000 nights in Denmark, of which 76% were spent in the Region Hovedstaden (the Capital Region of Copenhagen). Hotels are the most frequent accommodation.

French overnight stays have increased by 82% in the period 2008-2016, primarily in the Metropolitan area.

The French prefer August and July. In 2016, 30% of overnight stays took place in these two months. French visits are spread relatively evenly over the year.

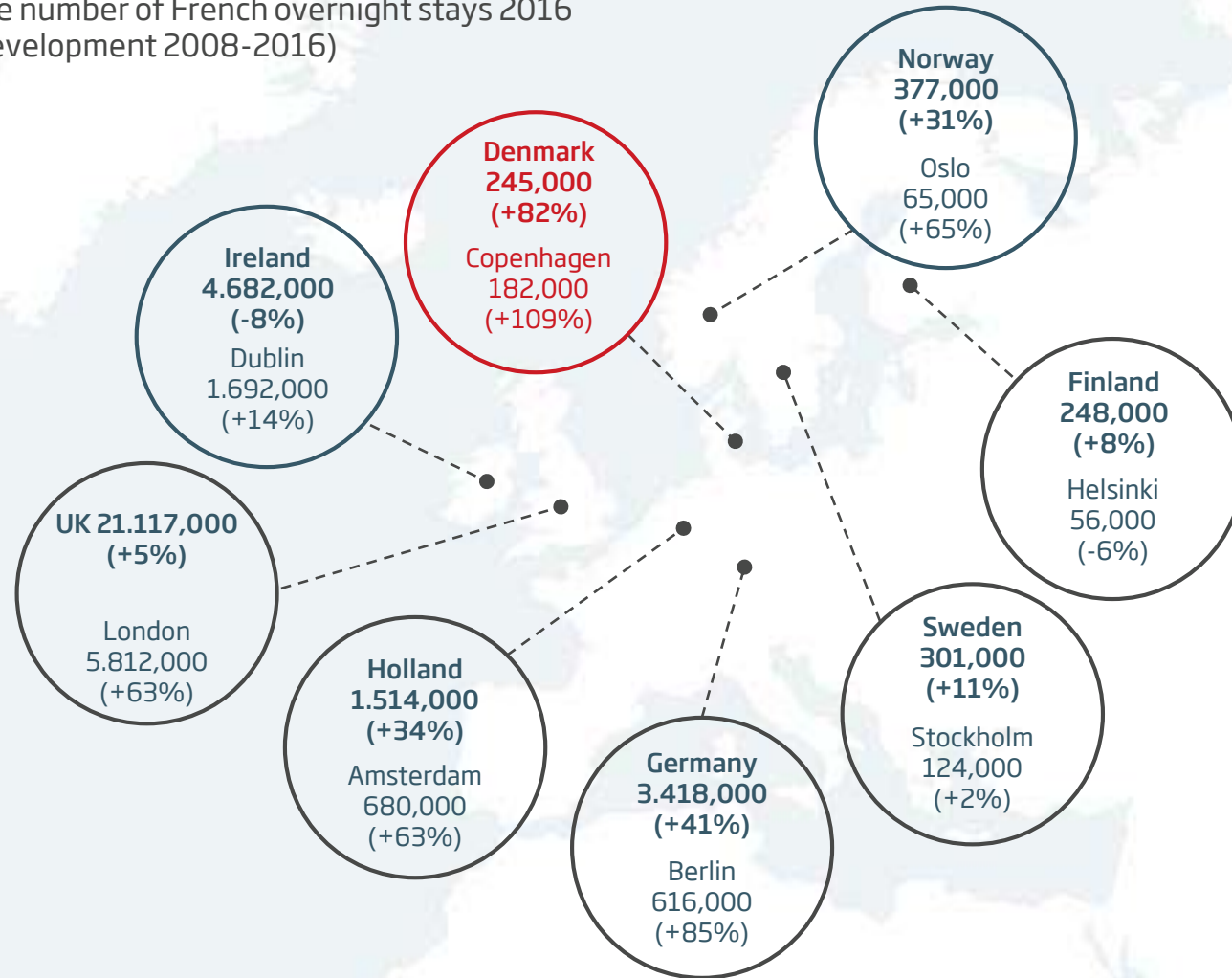
France has a number of holidays in slightly different time periods as opposed to Northern Europe in general, which is why there is untapped potential in attracting French tourists in shoulder seasons.



Source: Danmarks Statistik (definitive figures for 2016). Overnight stays cover leisure as well as business purposes. The Region Hovedstaden covers the districts of the City of Copenhagen and the Metropolitan area as well as the island of Bornholm. *Notice: France is one of the nationalities not registered in holiday home statistics.

French overnight stays in the Northern European competition field

The number of French overnight stays 2016
(development 2008-2016)



Strong growth in French overnight stays

Out of all the Nordic capitals, Copenhagen has by far the largest number of French overnight stays. With 182,000 overnight stays, Copenhagen represents a total of 43% of all French overnight stays in the Nordic countries.

Denmark has fewer French overnight stays than the rest of the Nordic countries, but with a growth of 82% from 2008 to 2016, Denmark is catching up with its fellow Nordic competitors. As can be seen from the growth of the other competitive countries, there is significant potential in the French market.

There is a tendency in Northern Europe for French overnight stays to increase faster in the capitals than nationwide. Sweden and Finland are exceptions.

Source: Oxford Economics and Danmarks Statistik. The number of overnight stays have been subject to rounding. Overnight stays cover leisure as well as business purposes. Copenhagen covers the City of Copenhagen and the Metropolitan area.

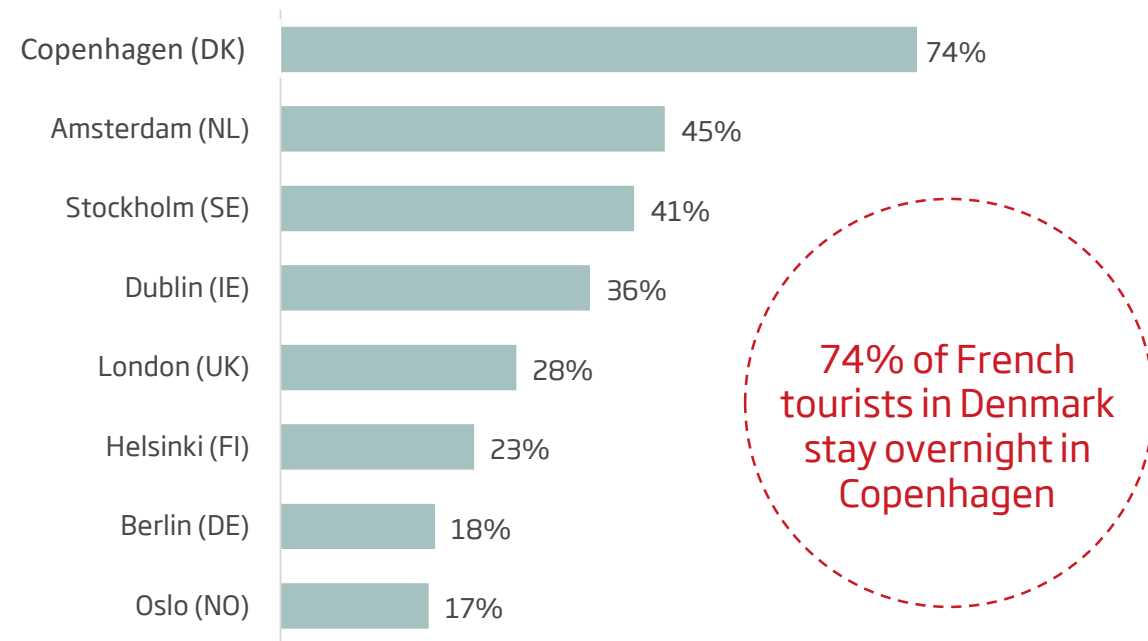
French overnight stays in the capitals of Northern Europe

The French primarily use Denmark for city breaks

74% of all French overnight stays in Denmark are spent in Copenhagen. In the other Nordic countries, the capitals are not providing the majority of French overnight stays. In Norway, Oslo represents only 17% of all overnight stays.

The high percentage of French tourists in Copenhagen compared to competitive destinations such as Holland, Sweden and Ireland confirms the existence of untapped potential for coastal and nature tourism in Denmark for French tourists.

The capitals' percentage of French overnight stays in their respective countries in 2016





The Market for Holiday Travel in Paris

Travel behaviour and holiday destinations in 2016

Holiday destinations in 2016

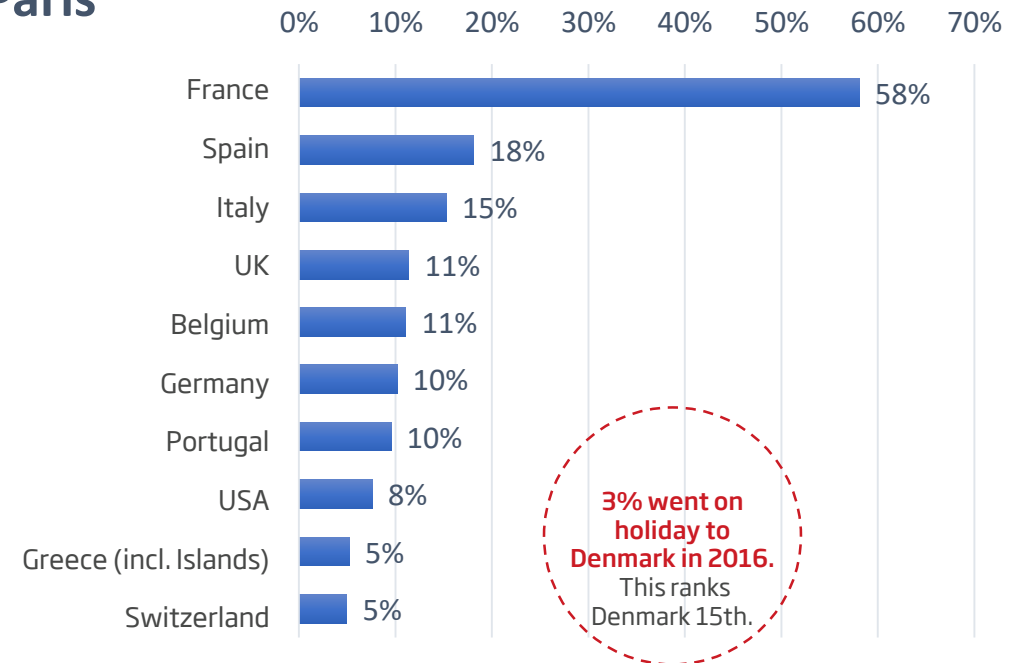
Most people went on holiday to Southern Europe in 2016

58% of the population in Paris spent their holiday in their home country in 2016. Spain and Italy also attracted many tourists.

3% in Paris went to Denmark in 2016.

Which of the following destinations did you visit on holiday in 2016*?
Several possible answers

Paris



Source: VisitDenmark's Image and Potential Analysis in Paris 2017. N= 1.024.

* A holiday is defined as a vacation with minimum one overnight stay and consists of either paid or private accomodation

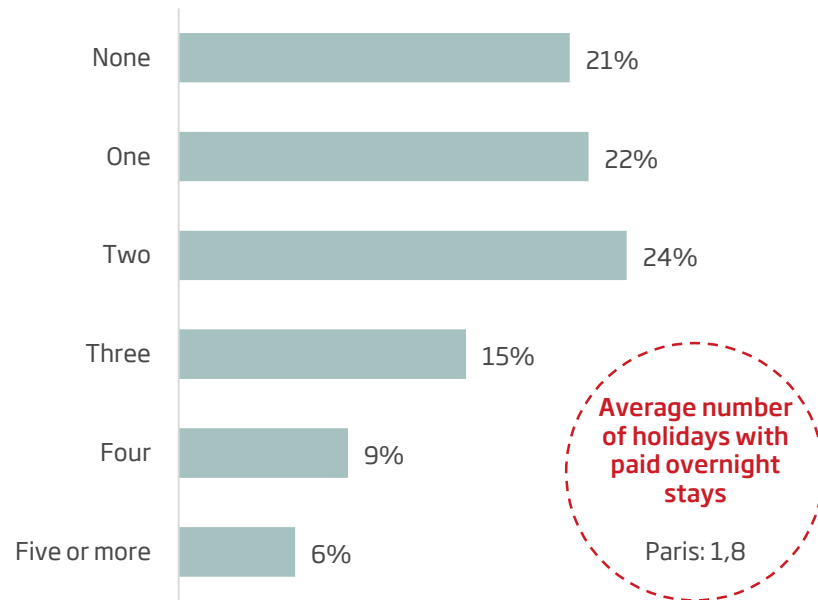
Holidays with paid overnight stays in 2016

The French like to travel

76% of the population in Paris went on one or several holidays where they paid for overnight stays during 2016. An average of nearly two holidays.

How many holidays did you go on in 2016 where you paid for accomodation?

Paris

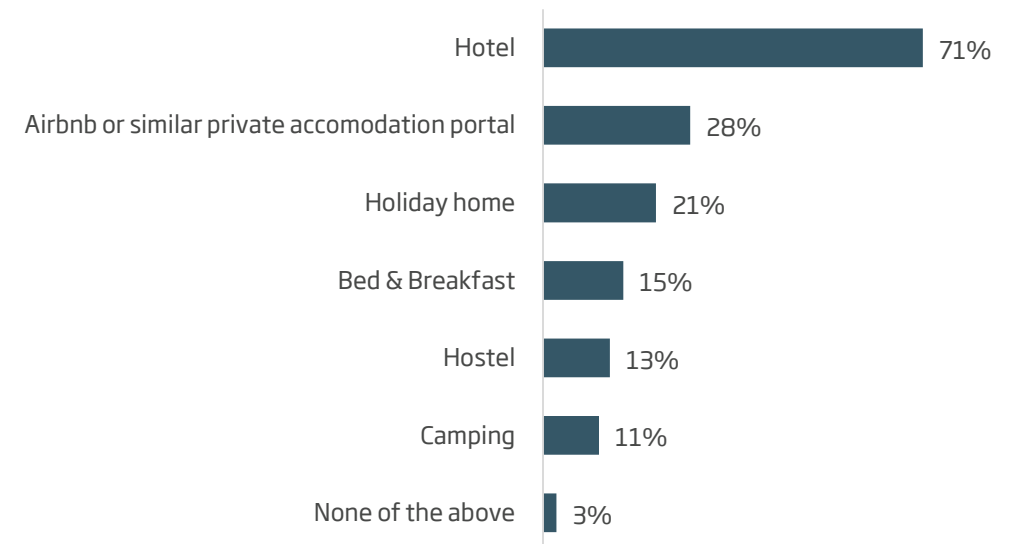


Hotels and private accomodation score the highest

71% went to a hotel for their holidays with paid overnight stays. Private accomodation, such as Airbnb, was also used by several French people.

Which type of overnight stay did you make use of on holidays with paid accomodation in 2016? Multiple answers possible

Paris





Denmark's Potential 2017

Expected destinations

Expected destinations in 2017

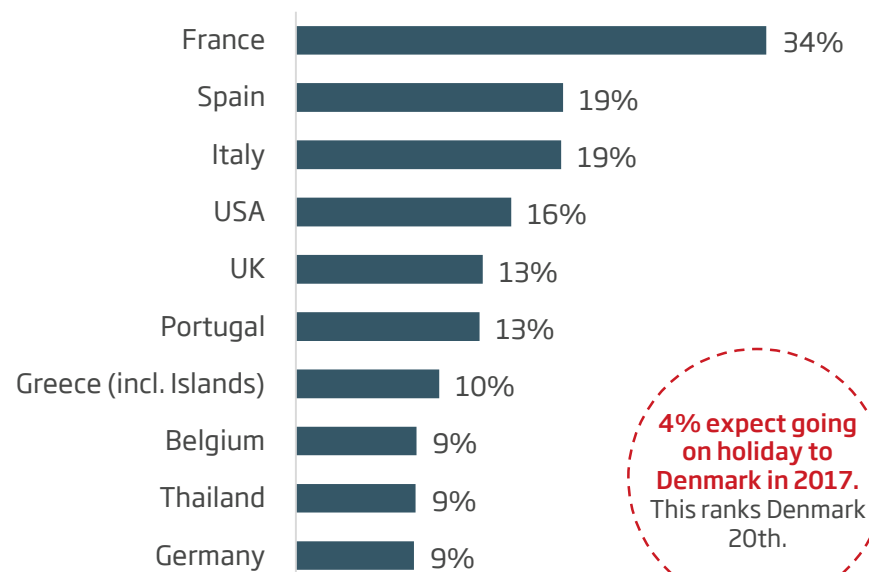
The French long for many destinations

In Paris, 4% are expected to visit Denmark in 2017. That's approx. 100,000 tourists**.

1 out of 3 expects going on holiday in France. Spain and Italy are the two most popular destinations abroad.

Which destinations are you expected to visit on holiday in 2017*? **Top 10**

Paris



4% expect going on holiday to Denmark in 2017.
This ranks Denmark 20th.

Source: VisitDenmark's Image and Potential Analysis in Paris. N=1.021.

* A holiday is defined as a vacation with minimum one overnight stay and consists of either paid or private accomodation

**The urban area of Paris has been used in order to calculate this number of people, with a population of 2.1 million.

Expected types of holiday in 2017

A mix of different holidays

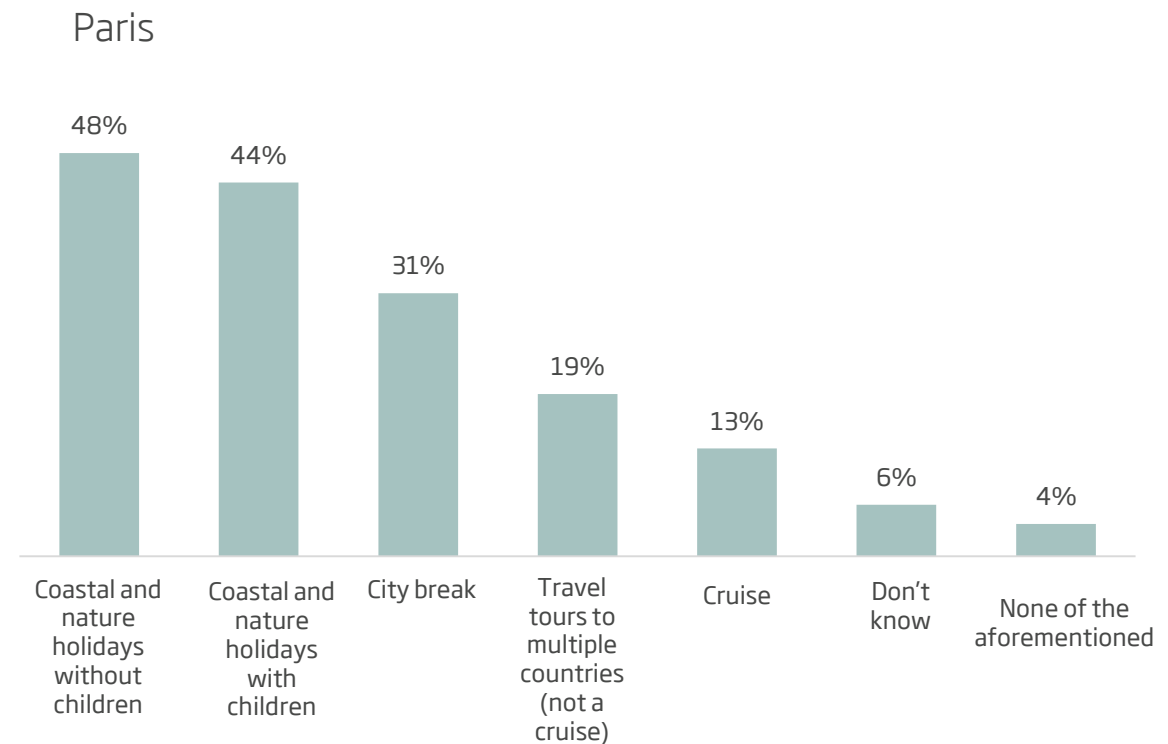
The vast majority of people in Paris expect going on one or several coastal and nature holidays in 2017.

31% expect going on a city break.

Travel tours and cruises with visits to big cities are also popular.

Which of the following types of holiday are you planning to go on in the coming 12 months*?

Several answers are possible



Expected types of holidays and destinations in 2017

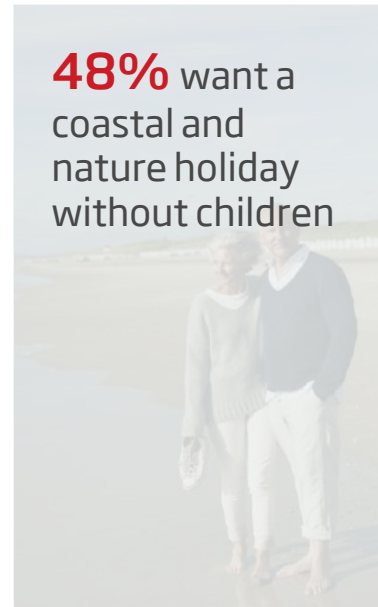
Denmark is mainly considered for city breaks

In Paris, 31% expect going on a city break with or without children in 2017. 10% of those put Copenhagen on the list of cities they would like to visit.

London and Barcelona are the most popular. Many also consider Reykjavik.

48% expect going on coastal and nature holidays without children. Sunny coastal destinations in southern Europe are the main targets. 7% consider Denmark.

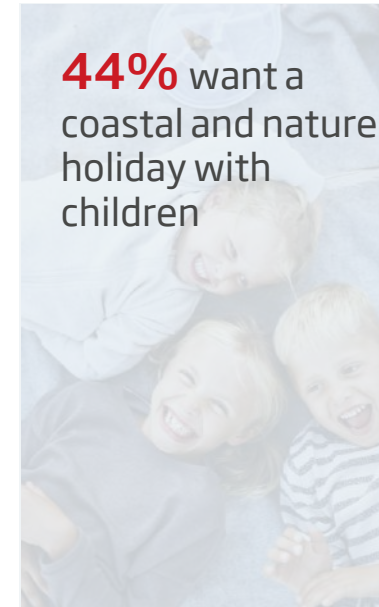
44% want to go on coastal and nature holidays with children. France is by far the most popular destination for a family holiday as well as other southern European countries. 5% consider Denmark.



48% want a coastal and nature holiday without children

Contemplated destinations

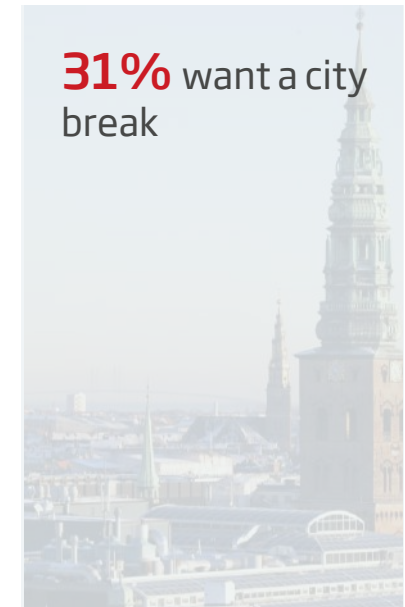
1	France	44%
2	Italy	26%
3	Spain	25%
4	Portugal	20%
5	Greece + the isles	20%
...		
15	Denmark	7%



44% want a coastal and nature holiday with children

Contemplated destinations

1	France	50%
2	Spain	26%
3	Italy	22%
4	Greece + the isles	15%
5	Portugal	15%
...		
17	Denmark	5%



31% want a city break

Contemplated destinations

1	London	40%
2	Barcelona	34%
3	Reykjavik	31%
4	Amsterdam	29%
5	New York	27%
...		
15	Copenhagen	10%

Criteria for choosing a city destination

A city break should offer value for money and local experiences

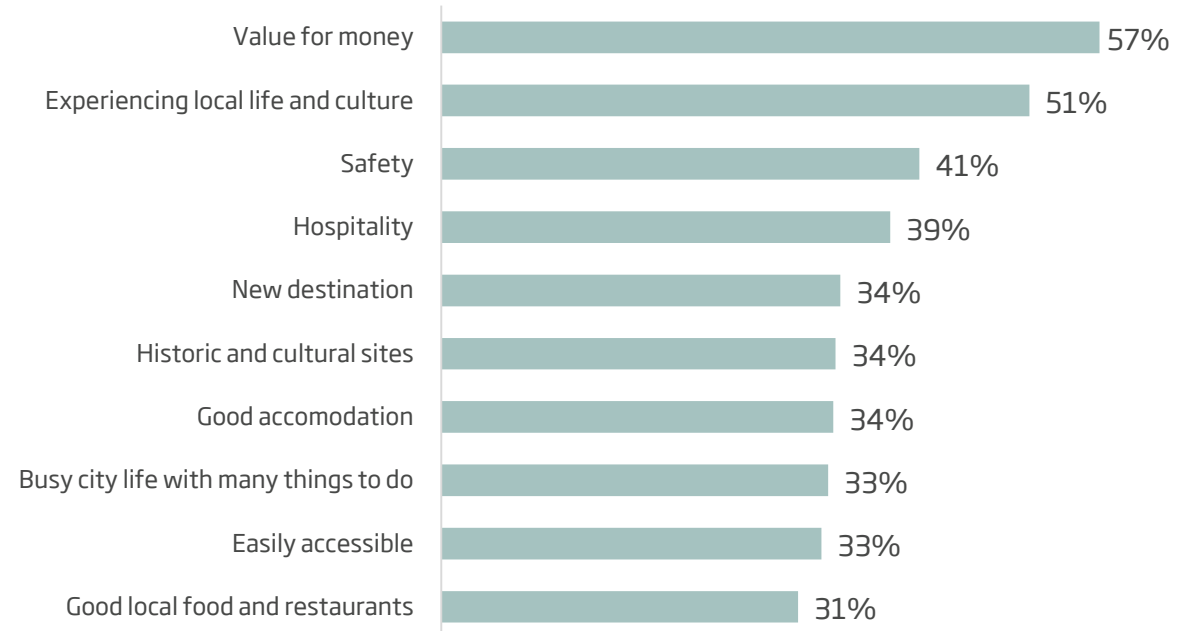
Local folklore and sights plus the experience of getting your money's worth are key factors when the people of Paris choose their city destination.

History, culture, good accommodation and food also play a part. 41% put safety as a priority.

In Paris, people are substantially more focused on hospitality and travelling to a new destination, compared to the populations of Rome and Milan*.

What is important for you when you choose a destination for your city break? **Top 10**
Several possible answers

Paris



Sources of influence when choosing a city break

Personal recommendations are highly valued

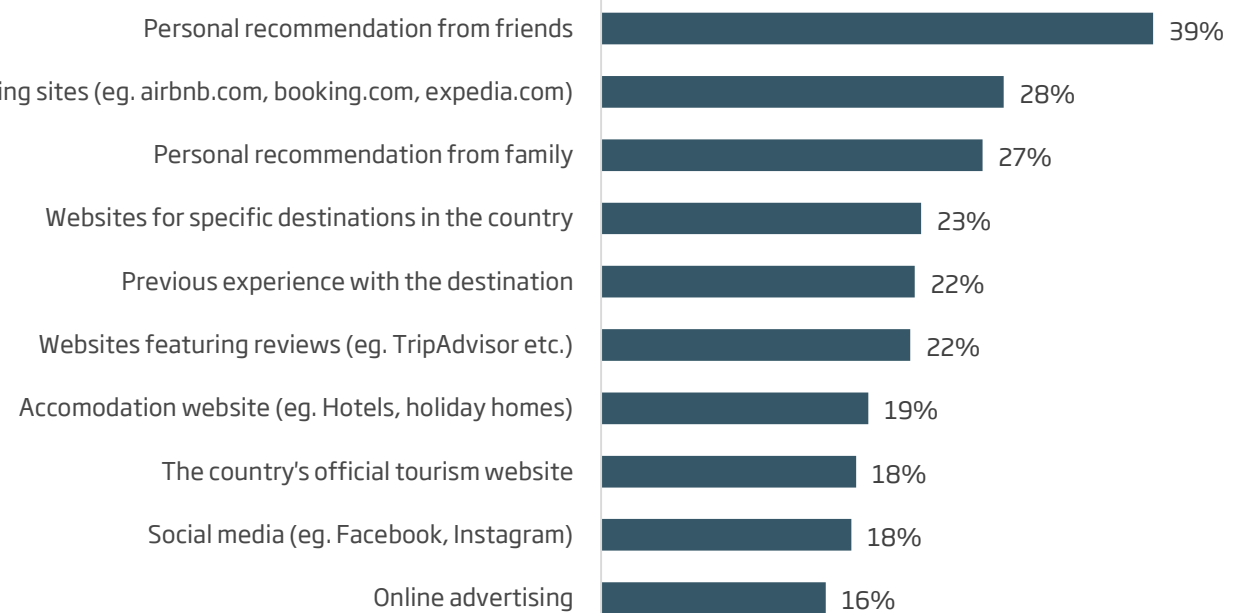
For 39% in Paris, recommendations from friends helped influence their choice of a city break abroad.

Online booking sites and official tourism websites are also key sources for the French.

18% also refer to social media influencing their choices.

What was important to your choice of a foreign destination for your latest city break? **Top 10**
Several possible answers

Paris





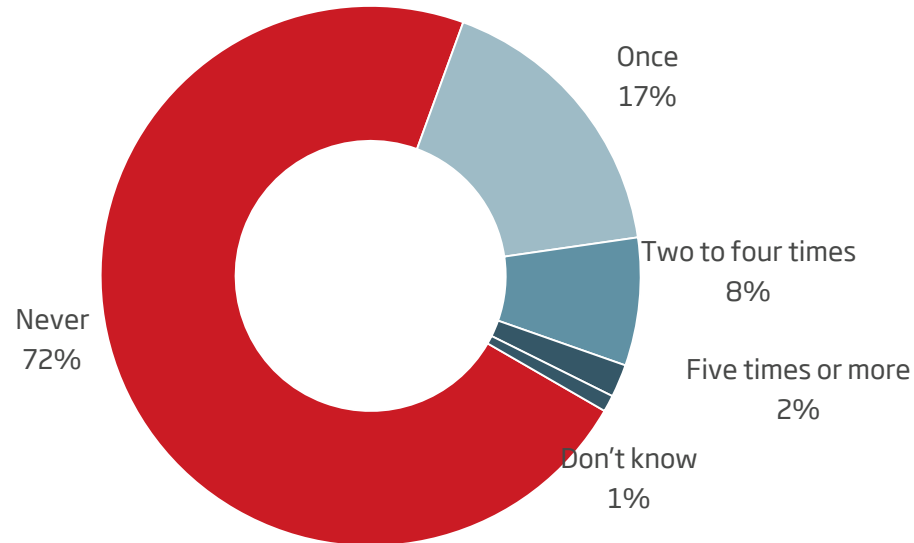
Knowledge of Denmark as a holiday destination

Experience, knowledge and associations

Holiday travel to Denmark

How many times have you been on holiday to Denmark?

Paris



Approximately 1 out of 4 has been on holiday to Denmark

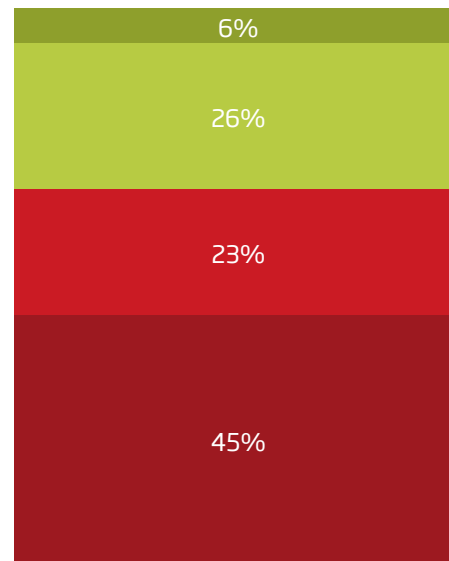
In Paris, 27% have been on holiday to Denmark some time or another.

Most have yet to visit Denmark for the first time.

Knowledge of Denmark as a holiday destination

How well do you know Denmark as a holiday destination?

Paris



■ I know nothing ■ I know very little ■ I know some ■ I know a great deal

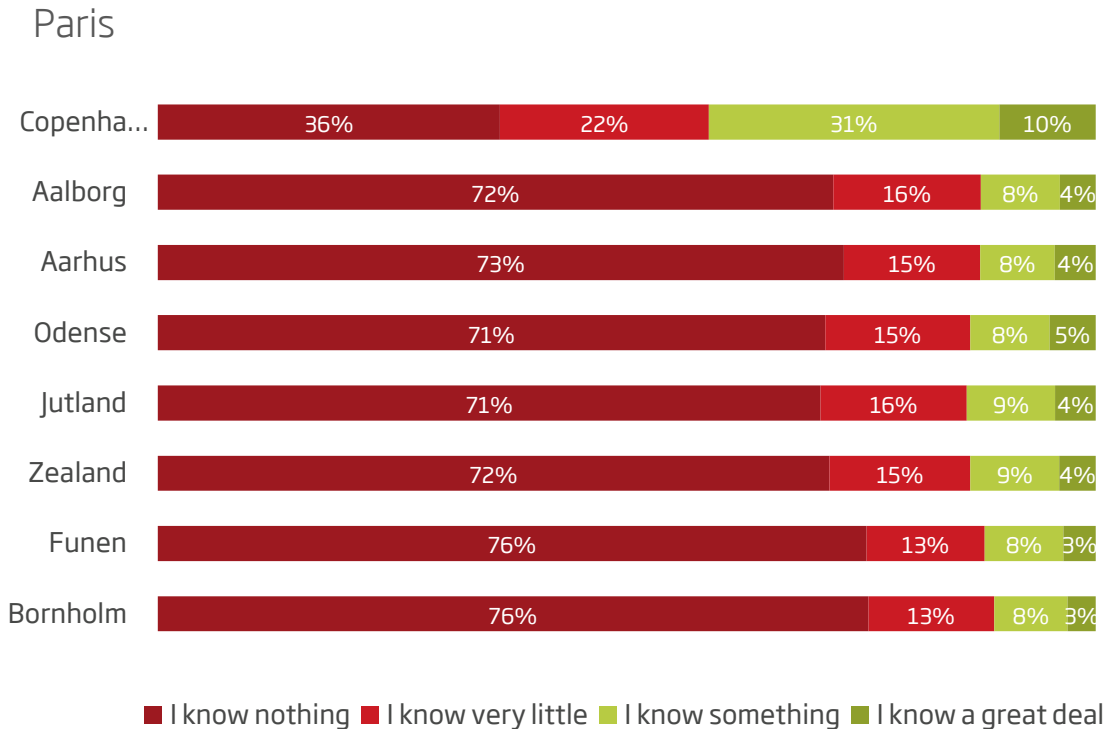
Fewer than 10% know a great deal about Denmark

In Paris, a total of 68% know either nothing or very little about Denmark as a holiday destination.

6% in Paris say that they know a great deal about Denmark. An additional 26% know something about Denmark.

Knowledge of holiday areas in Denmark - cities and communities

How well do you know these holiday destinations in Denmark?



Copenhagen is best known

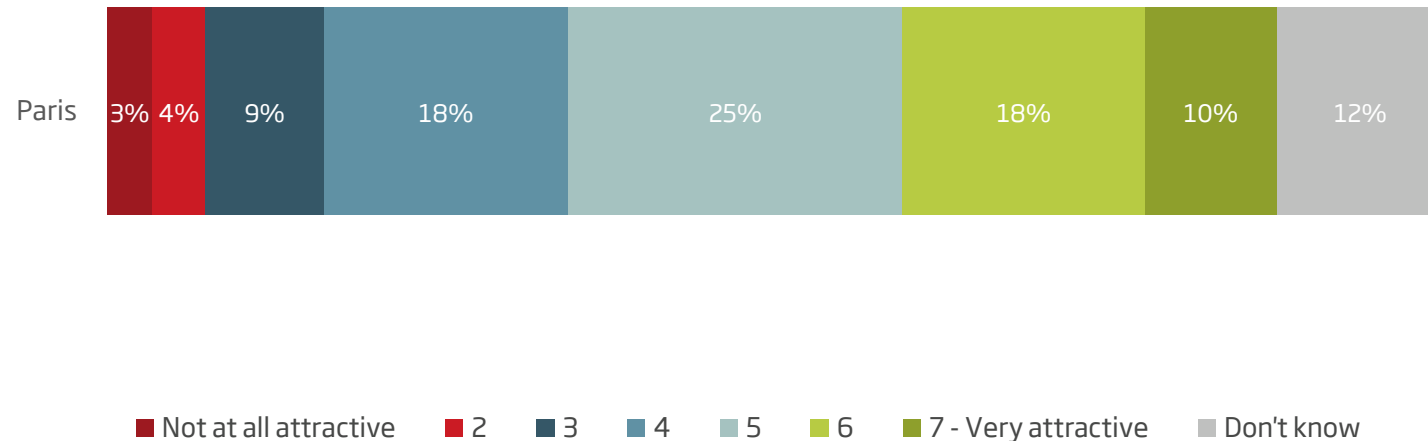
Copenhagen is the Danish holiday destination, which most people in Paris know.

10% know a great deal about Copenhagen while 31% know something about Copenhagen as a holiday destination.

Knowledge of Copenhagen is considerably higher than knowledge of Denmark in general.

Attitude towards Denmark as a holiday destination

How attractive would you rate Denmark as a holiday destination?



Most people approve of Denmark as a holiday destination

Among the population of Paris, 10% find that Denmark is a very attractive holiday destination.

28% rate Denmark a 6 or a 7; the two highest on the scale.

Only 3% find Denmark not to be an attractive holiday destination.

This rating of Denmark's attractiveness should be viewed in the context of the relatively limited knowledge of Denmark in general.

Paris: Free associations regarding Denmark

What comes to mind when you think of Denmark? (free associations)



Cold weather and Copenhagen dominate the image of Denmark

In Paris, the French primarily associate Denmark with Copenhagen and The Little Mermaid. Culture, vikings, bikes and design are mentioned by some.

Denmark is described as a cold and clean country in Scandinavia with high living standards and an excellent quality of life. Quite a few mention snow and the cold.

Denmark is also associated with beautiful scenery, nature and the sea.

In Paris, the image of Denmark particularly matches those characteristics requested for a city break: local experiences as well as history and culture (see pag. 15). To boot, Denmark provides a concept of novelty, which is also requested since the French have limited knowledge of Danish food, icons and folklore.

Associations with Denmark

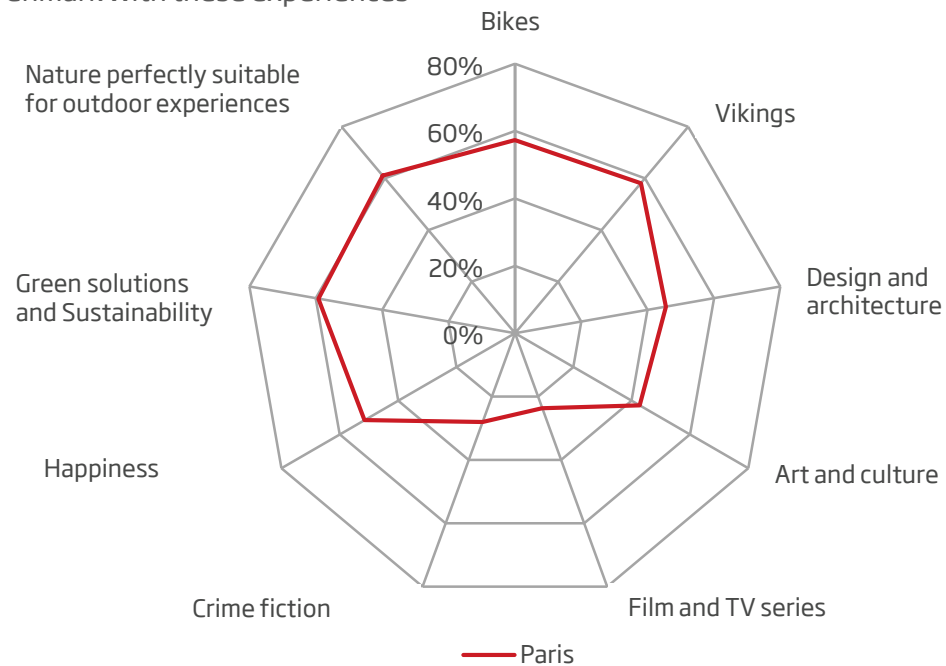
Denmark is especially associated with nature, vikings and bikes

More than half associate Denmark with bikes, outdoor activities and green solutions. Vikings, design and culture also spring to mind. The Nordic cuisine strikes more of a Danish chord than gastronomy in general.

Danish beer, pastry and *Smørrebrød* (open sandwiches) are also famous voices on the menu.

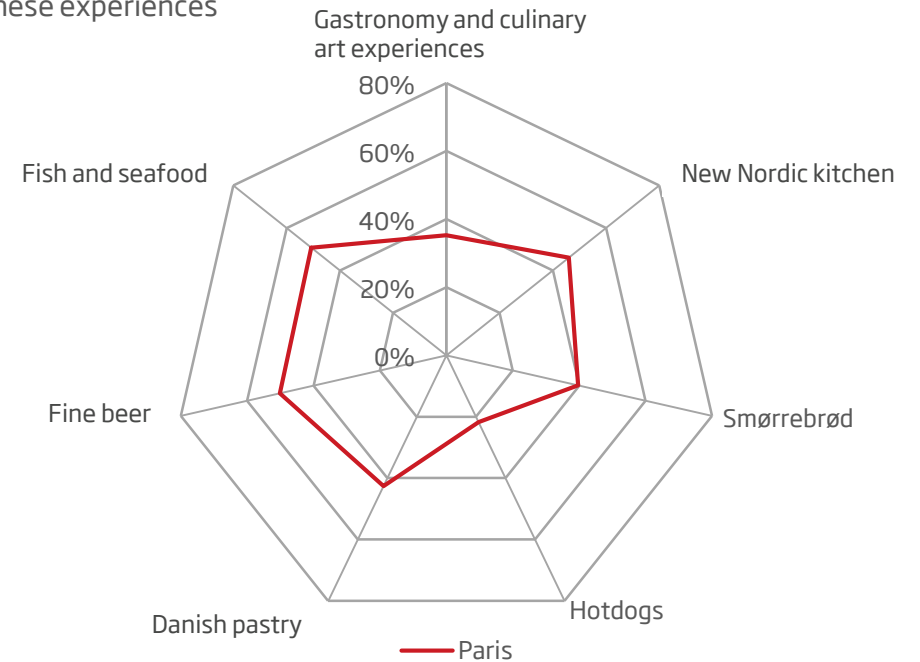
Culture

Percentage which "largely" or "to a great extent" associates Denmark with these experiences



Gastronomi

Percentage which "largely" or "to a great extent" associates Denmark with these experiences



Impression of Denmark as a holiday destination

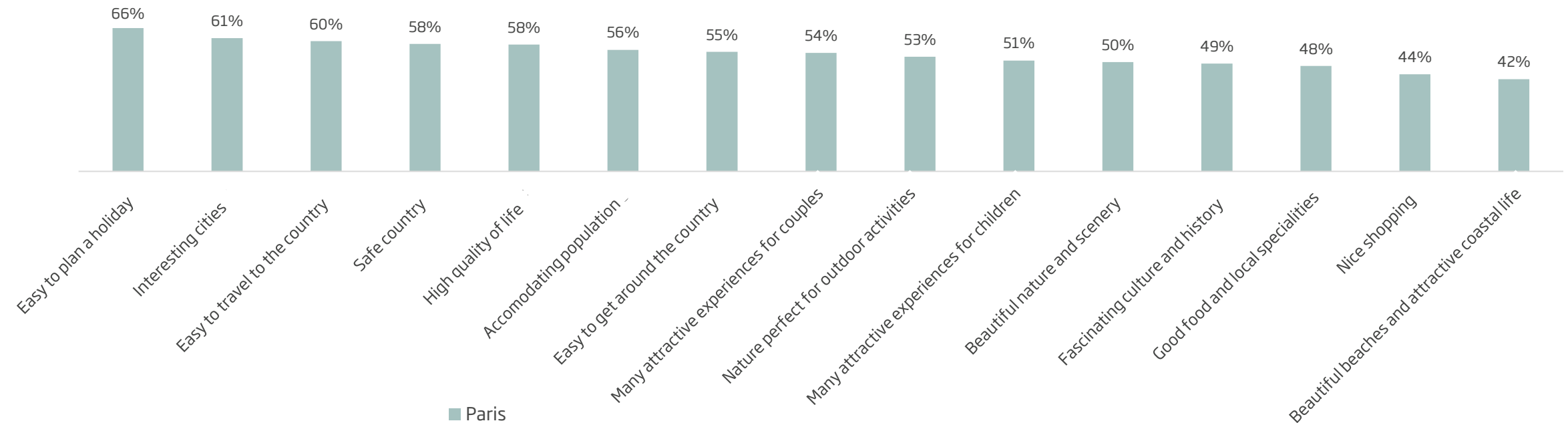
Going on holiday to Denmark is easy

In Paris, most people have the impression that it is easy to plan and leave for a holiday in Denmark. There is also a general agreement that Denmark is a safe country with a high quality of life and an accommodating population.

60% associate Denmark with interesting cities

The French seem to think that Denmark has some interesting cities. Nature and scenery are also associated with a holiday in Denmark, while less than half view beaches, shopping and good food as a part of their holiday.

Which statement do you associate with a holiday in Denmark



A couple is seen from behind, sitting on a balcony. The woman has blonde hair tied back and sunglasses on her head. The man is wearing a white shirt with small palm tree patterns. In the foreground, two glasses of beer are on a table. The background shows a cityscape with buildings and a body of water under a clear sky.

Knowledge Bank on tourism in Denmark

www.visitdenmark.dk/analyse

Follow us on  – VisitDenmark Viden & Analyse