

Market insight



Denmark

Analysis of tourist profiles, traveler flows, transportation and target groups

April 2019



ÍSLANDSSTOFA
PROMOTE ICELAND

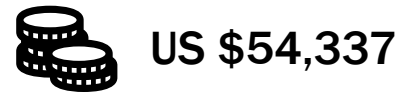
Market profile

Economy

Real GDP Growth



GDP per capita



Consumer price inflation



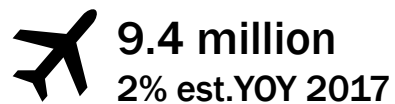
Population



Travel & Tourism

GLOBAL

Total Outbound Trips

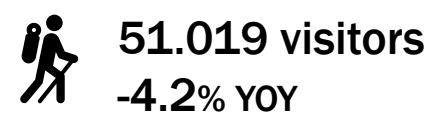


Average spend per trip



ICELAND

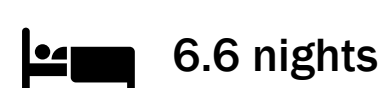
DK visitors to Iceland 2018



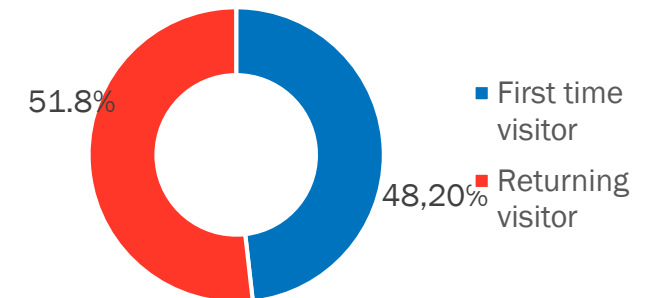
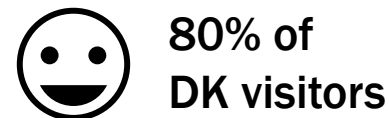
Share of guest nights



Average length of stay



Likelihood of return visit



Air capacity to Iceland 2018



690 thousand seats
-3,8% YOY

All year direct flights

- Copenhagen

Seasonal direct flights

- Billund

Airlines



Seasonality

DK is an important visitor market in Iceland. Visitors have a similar pattern of arrivals as total arrivals.

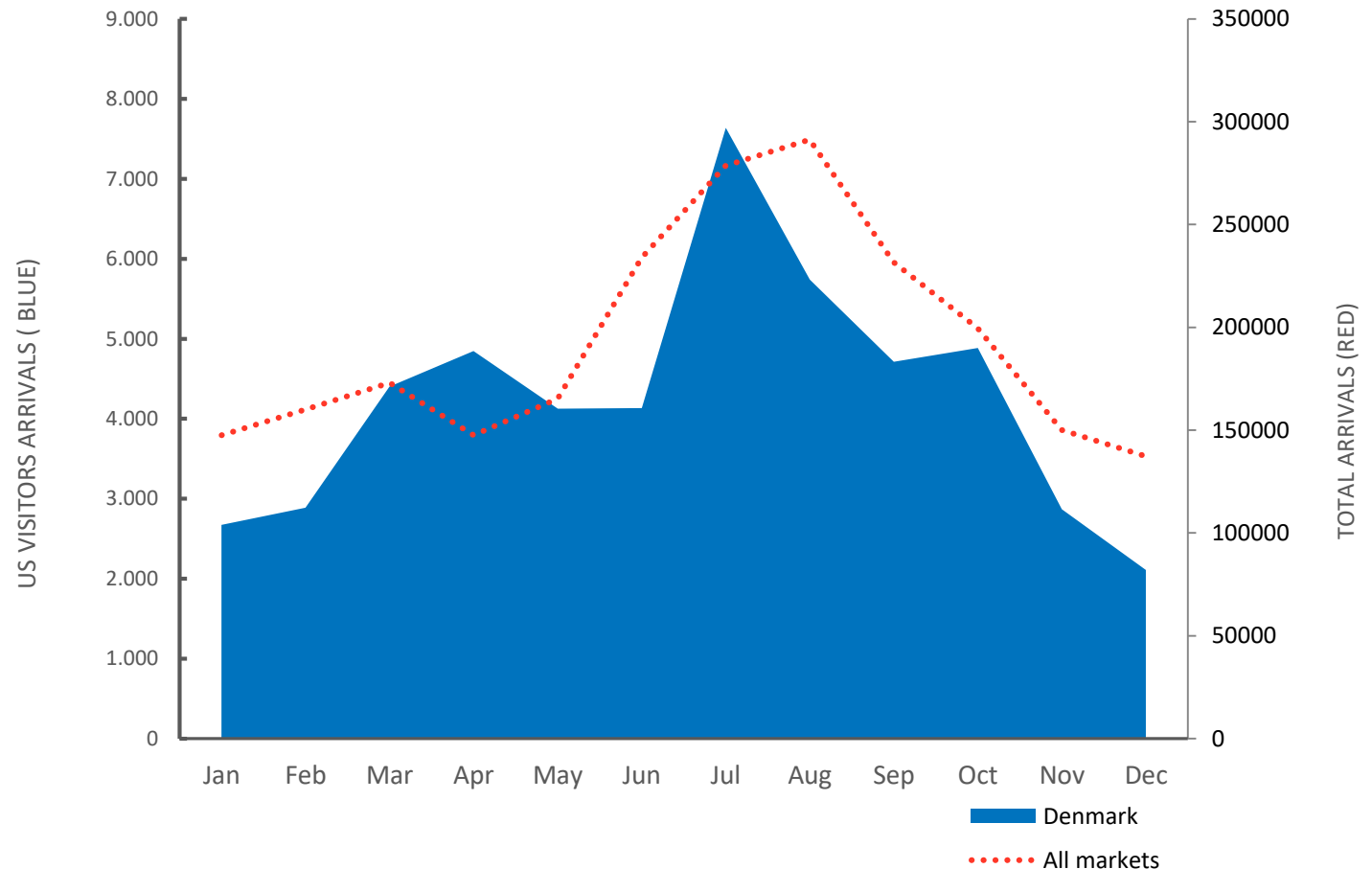
COME DURING

SUMMER: 34%
(JUNE – AUGUST, ALL MARKET AVG 35%)

WINTER: 29%
(JAN – MARCH, NOV – DEC
ALL MARKET AVG 33%)

SPRING: 18%
(APRIL – MAY, ALL MARKET AVG 14%)

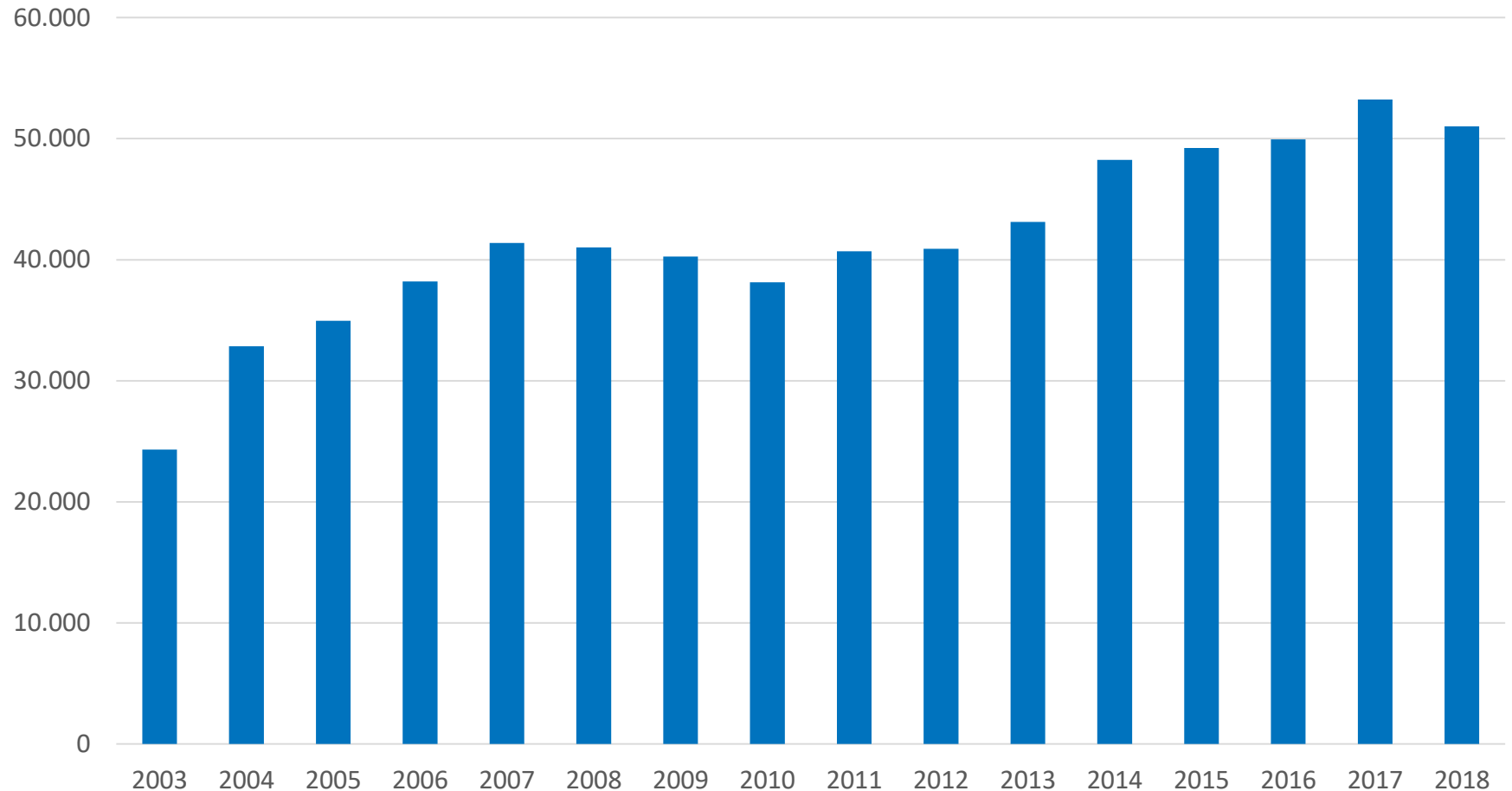
AUTUMN: 19%
(SEPT – OCT, ALL MARKET AVG 19%)



Arrivals over time

- Denmark has been a steady market for Iceland
- SAS started flying to Iceland all year round in 2016

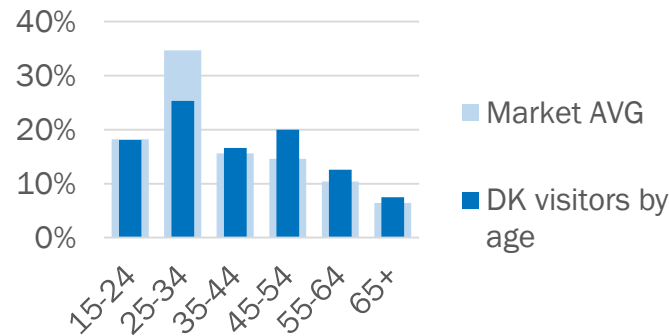
Visitor arrivals from DK



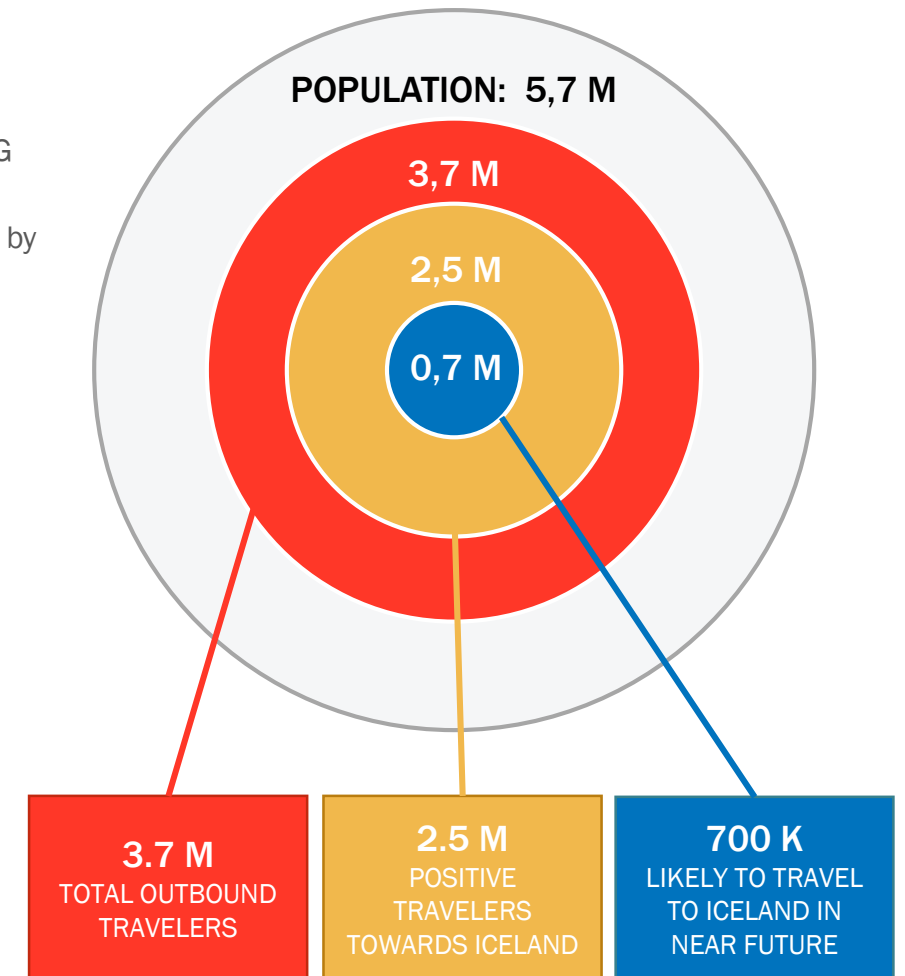
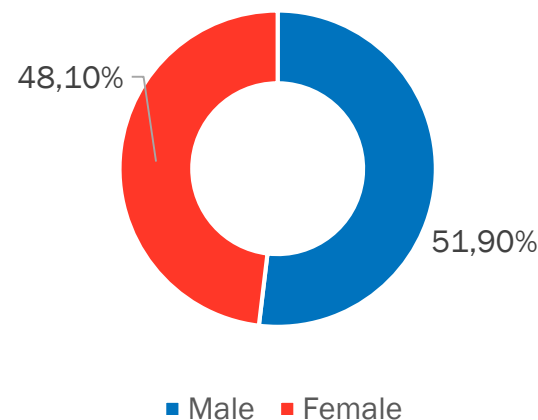
Traveler profile

- In outbound tourism there can be seen some strong signs of growth in the recent years.
- Europe is the most visited region by DK visitors. They tend to travel to South-Europe where Spain is the most popular destination. Italy, Greece and Germany are popular as well
- Middle-aged DK travelers comprise the majority of holidaymakers, with the age of 30-50 totaling a 39% of overall holiday takers.
- 39,3% of Danish millennials say that they want to visit Iceland within the next 3 years as well as those between 30-39 counting up to 42,2% in the same category.
- A 48% of the Danish population travel by plane to reach their destination
- Up to 60% of the population decide and plan on holiday from 2-6 months in advance.
- 60% of Danish visitors to Iceland are leisure travelers (26% below average compared to other nationalities) and 13.5% travel to Iceland for business purposes (10% above average).

DK visitors by age



DK visitors by gender



Target groups

For Icelandic Tourism





Denmark

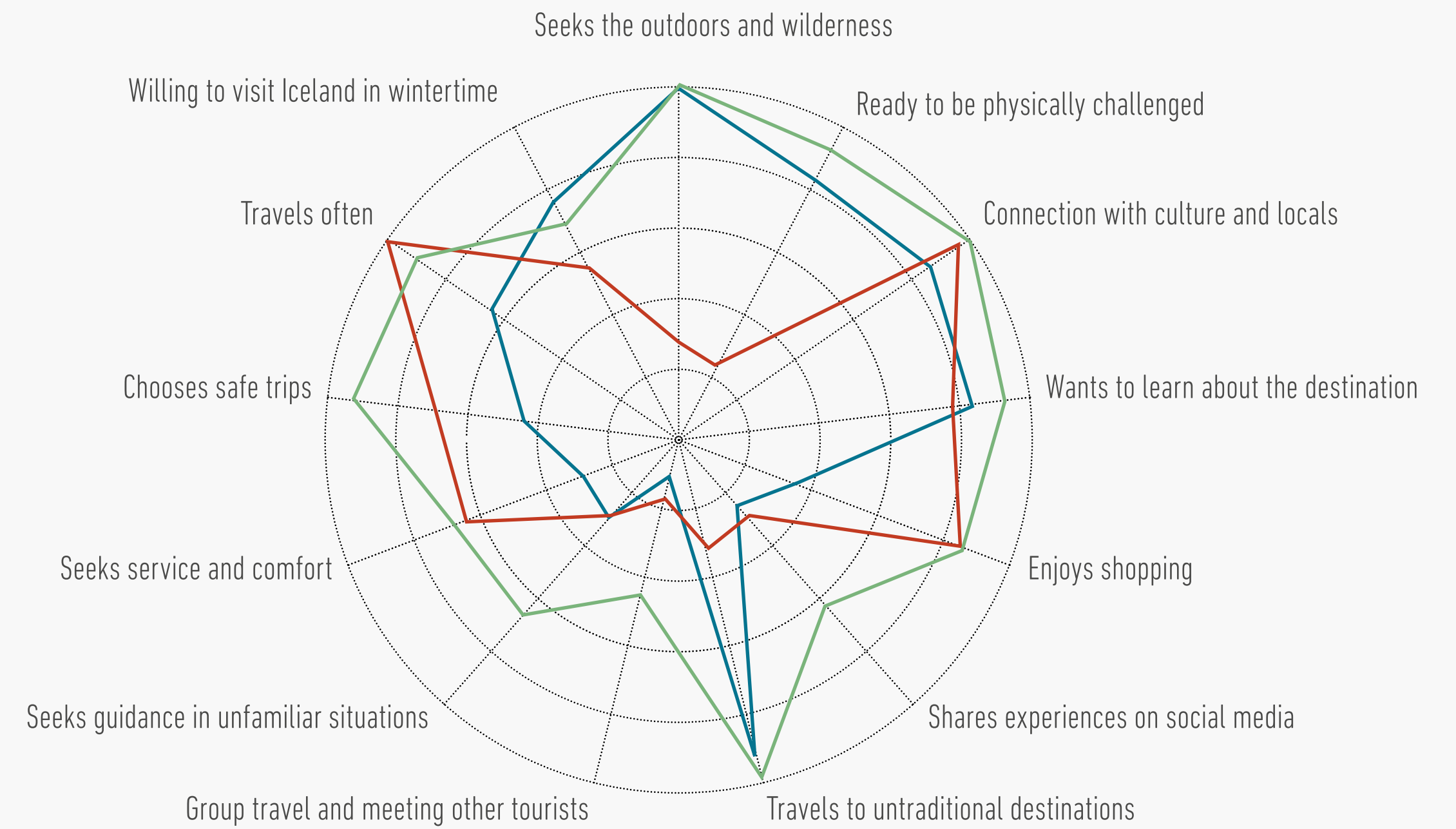
5,7 million

Population: 5,7 million people

Annual number of outbound travellers: 3,7 million people

Annual leave entitlement: 36 days

- **Fun-loving Globetrotters:** 1,3 million travellers
- **Independent Explorers:** 800 thousand travellers
- **Cultural Comfort Seekers:** 900 thousand travellers





Denmark:

The Fun-loving Globetrotter

% of the Danish market: 35%

—
An extrovert, creative and open to new ideas and company. Curious by nature and likes to be challenged by experiencing unfamiliar nature and cultures, without taking unnecessary risks. Enjoys seeing how locals live and makes time to truly experience.

Value for Icelandic Tourism:

- Travels during wintertime
- Active traveller
- Likely to re-visit
- Cares about the environment and protecting nature
- Ready to pay for quality, service and goods
- Careful by nature and seeks guidance and quality certifications
- Willing to travel further and visit smaller communities





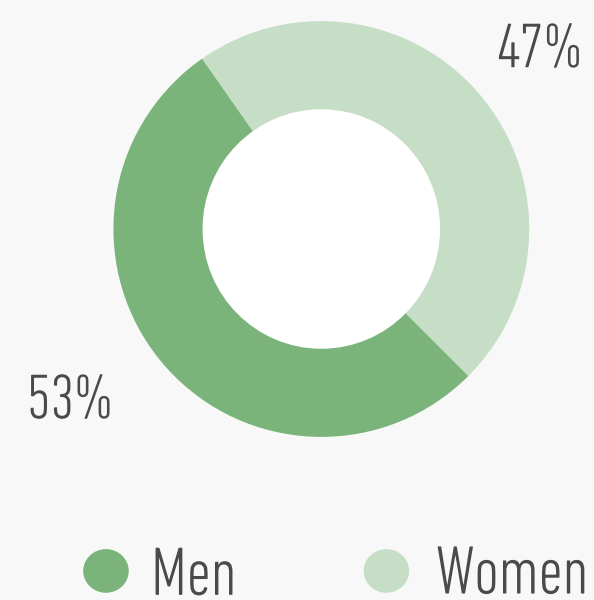
The Person

- I live in a city or large town, am educated and have an average income.
- I desire to get away from my daily routine and experience something new in my life.
- I enjoy physical activity and prioritise my health.
- I enjoy shopping and buying new things.
- Certain brands represent quality, style and status.
- I have an open personality and enjoy meeting new people.
- I care about the environment, I understand that the threat of climate change must be met and am willing to do my part for nature.

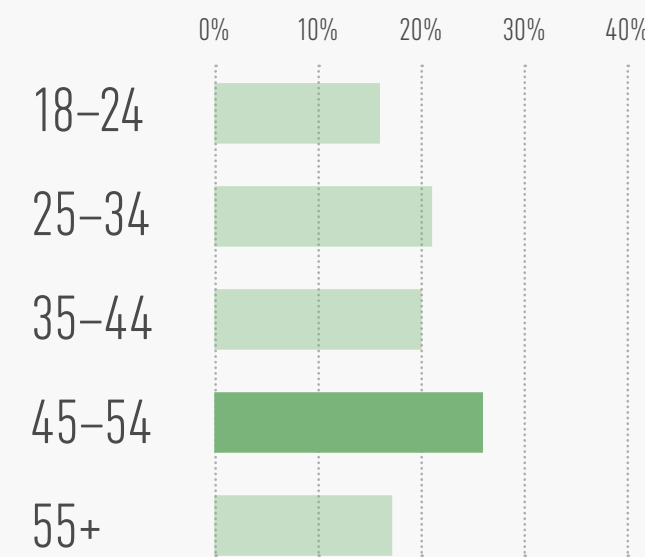
Keywords

- Fashionable, shopping, brands
- Comfort and safety
- Extrovert and seeking
- Culture and history
- Inquisitive

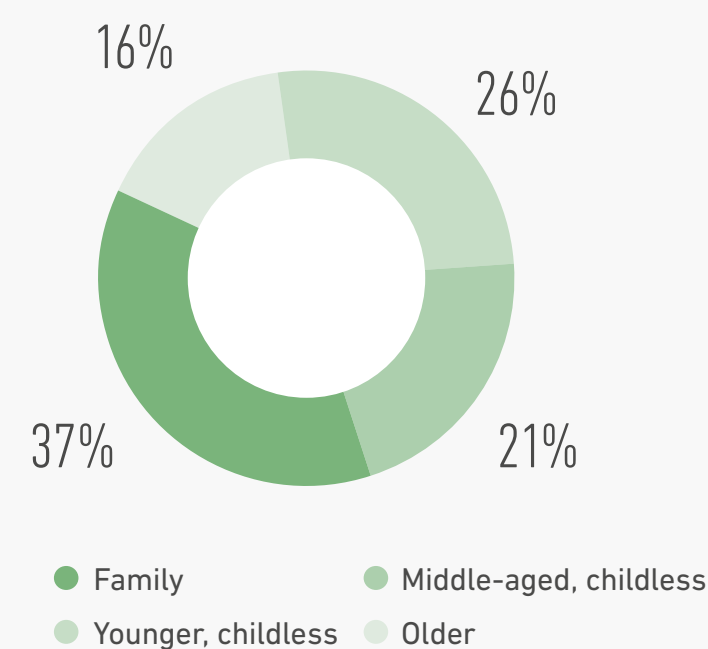
Sex ratio



Age



Life span



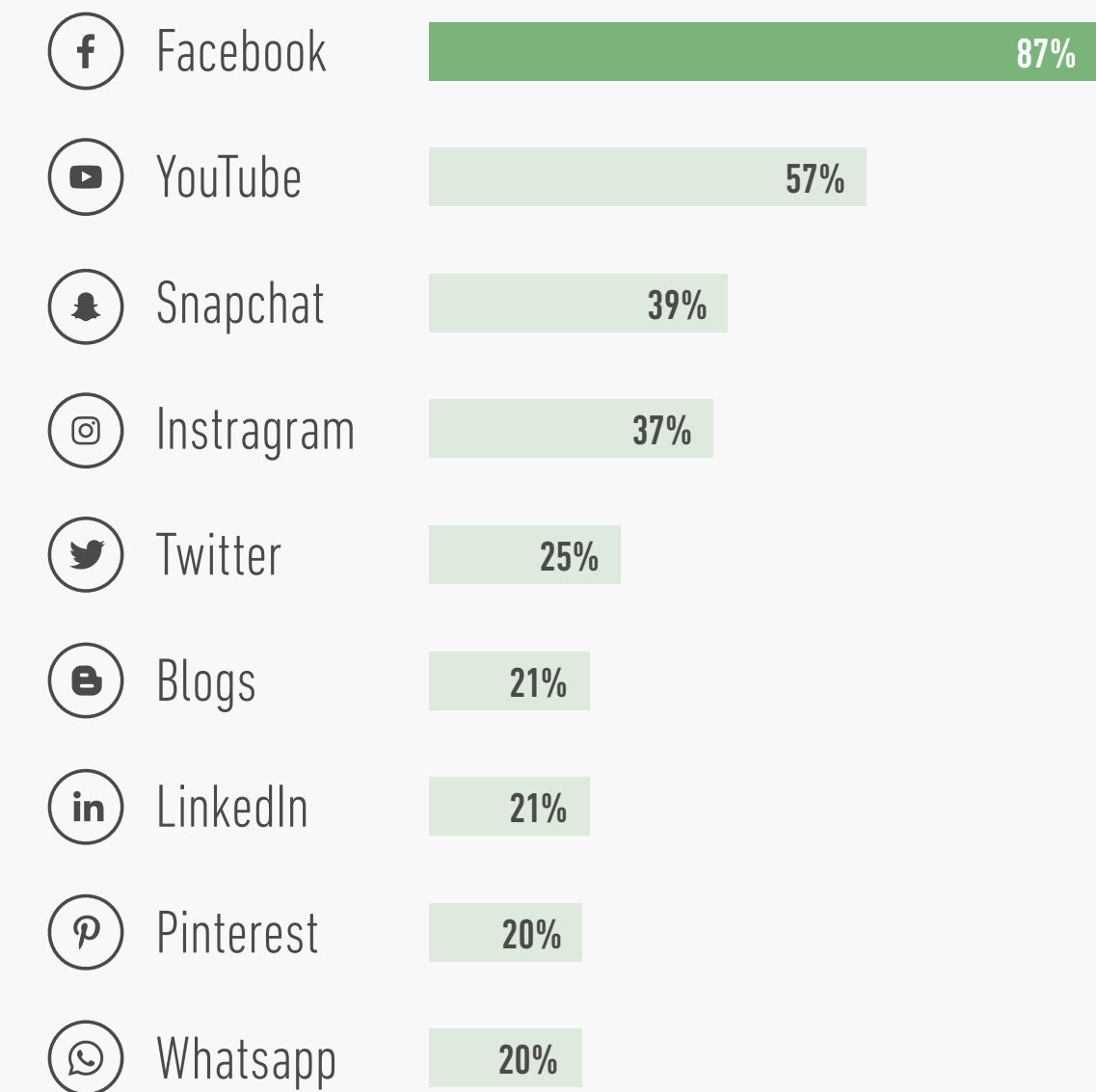
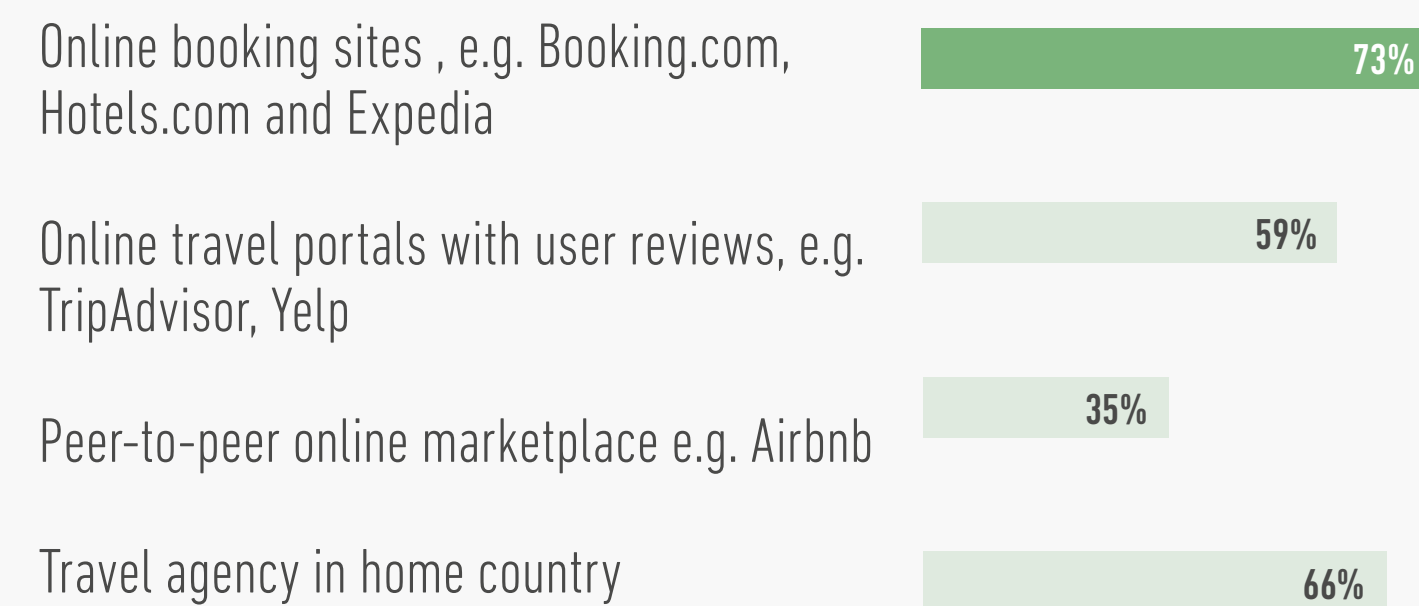
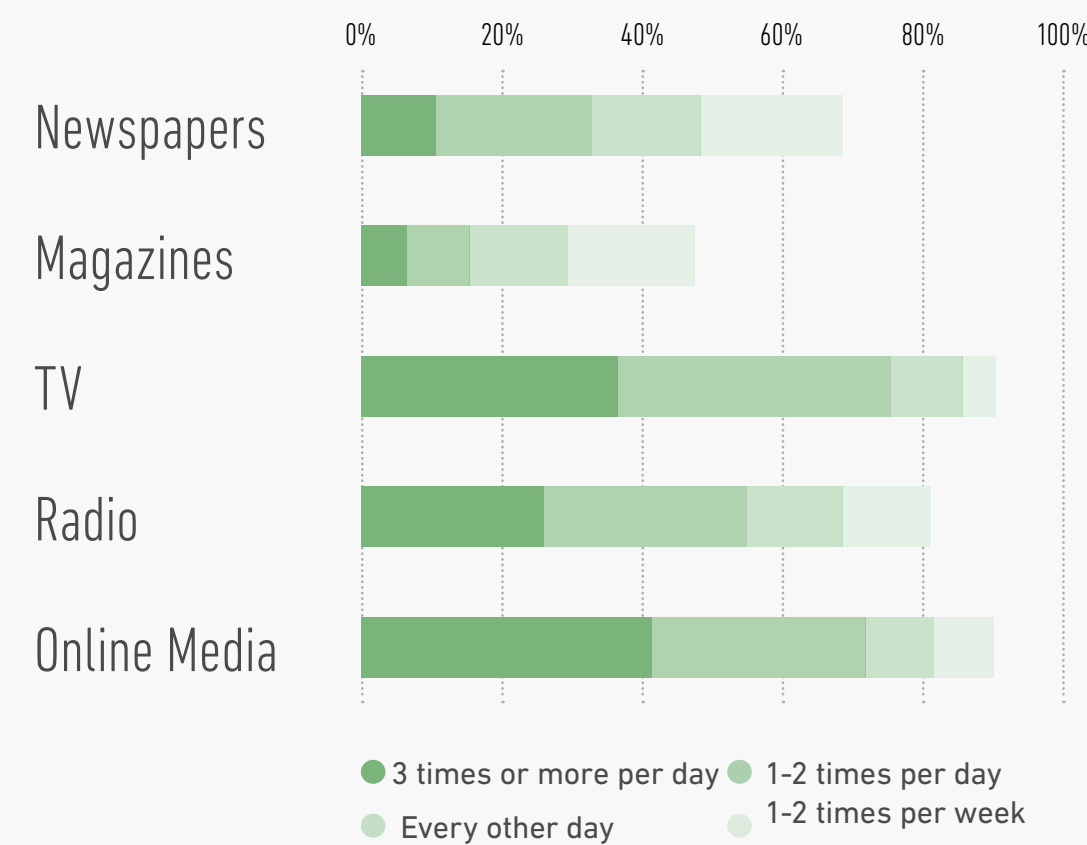
Top 10 interests

1. Reading
2. Walking
3. Cycling
4. Gourmet / Fine food
5. Health / Natural Foods
6. Fashion / Clothing
7. Gym / Fitness
8. Hiking / Walking
9. Gardening
10. Photography



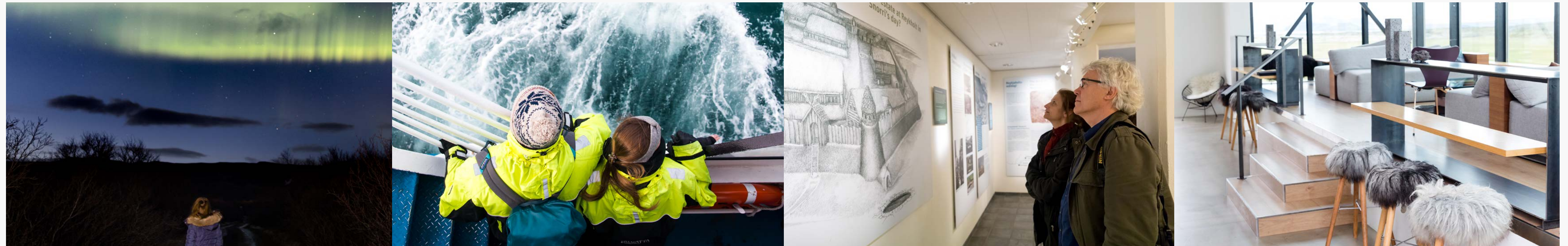
The Consumer

- I am a very active media user, and use traditional media, online media and social media.
- I use all major social media outlets and enjoy communicating with others in that arena.
- I enjoy shopping and am a fashionable person.
- I am quick to grasp new technology and use services such as Airbnb, Uber and TripAdvisor.
- Recommendations from other travellers are important to me during the decision making process and I use Tripadvisor and similar websites.
- I book tours equally online and through tour agencies in my home country.
- I appreciate personal service and direct contact with service providers.
- I am ready to pay a premium for quality and like to have a few options to compare prices and services.





The Traveller



The Type

I love travelling and appreciate a challenge, I enjoy experiencing new things and seeing the world. Travelling is a lifestyle and I enjoy telling others about it on social media. The journey is stimulating and unfamiliar destinations fascinate me. I enjoy learning about each destination I visit, connecting with the locals and prefer to stay longer or to return.

Planning

I do not want to take unnecessary risks and rather choose professional guidance in unfamiliar circumstances. Quality- and environmental certifications matter to me, as do certain brands. Reviews from other travellers matter to me when I am planning recreational activities.

Experiences

I am an adventure seeker and enjoy new and exciting experiences. I am at home in nature and like to spend time in museums and visiting places of historical interest to learn more about local culture and traditions. I enjoy tasting local cuisine and talking to the locals in order to see the world in a new way with their eyes. I like to enjoy myself when travelling and seek unique experiences that I can share with others on social media.

Accommodation

I prefer more quality, better service and fashionable places but the adventure and story of the trip will have the final say about where spend each night. I enjoy staying in places that have a special history or connection to the area and offer an opportunity to get to know other travellers.



Tourism

I seek:

- Guided activities in nature with beautiful surroundings
- Visiting small towns and experiencing the culture and the people
- Ecotourism
- Restaurants with high quality local produce
- Museums and places of historical interest
- Spas and wellbeing
- Daytrips / Group travel
- Family friendly activities
- Festivals / Events
- Shopping for Icelandic design

What I avoid on my travels:

- Any experience that may harm nature
- An inauthentic experience which is out of touch with the locals
- Uncertified service providers
- Unnecessary risks in unfamiliar situations





The Product

- Challenge and stimulation in a safe environment.
- Connecting with nature.
- Information about culture and history.
- Authentic “local” experiences greatly enhance the value of the product.
- High quality locally sourced food is a great advantage.
- Well organised with no surprises.
- Opportunity to get to know other travellers or locals.
- Environmentally friendly product.
- The opportunity to share the experience on social media.

Message and Tone

- Tell the story and introduce the people behind the product.
- Accessible and authentic experience.
- Feedback from others that have tried the product matters.
- Mention your connection to the destination or locals.
- The environmental impact of the product matters to the group.

Media

- The Target group follows the news- and lifestyle media, prioritise PR, e.g. media trips and press releases.
- The Target group is active on all major social media outlets (Facebook, Twitter, Instagram, Youtube and Snapchat).
- Make sure your company is active online and responds quickly to inquiries. Influencers may be effective in increasing the visibility of your product.
- The Target group is active online and researches destinations and books online.
- Using SEO, keyword advertising and online ads / website banners to reach the target group when it is searching for products that are similar to yours.
- Advertisements in traditional media could be effective, but cost a lot more and are not as targeted as social media ads. They are not very efficient since the target group is very active online and on social media.

Price

Less price-sensitive than other groups, ready to pay more for good quality and prefer to have a few options to compare prices and services.

Sales

- Other travellers' recommendations matter to this target group so it is good to show them reviews from other travellers, for example on TripAdvisor.
- Show environmental certifications and mention the sustainability of the product.
- Make sure that it is easy to book your product online by having a good website and/or being registered on popular booking sites.
- Make sure that it is easy to contact your company online and through social media and be personal in all communications.
- A large portion of this target group books trip through a travel agent in their home country.
- Joining a network of foreign travel agents may be a good idea.



Denmark:

The Independent Explorer

% of the Danish market: 21%

Does not want a typical holiday or overplanned itinerary and rather chooses unfamiliar and new options. Chooses to travel in a small group where authentic Icelandic experiences matter. Seeks opportunities to learn about the culture and history of the destination and travels in an environmentally friendly way.

Value for Icelandic Tourism:

- Willing to travel further and visit smaller communities
- Travels during wintertime
- Active traveller
- Likely to re-visit
- Cares about the environment and protecting nature



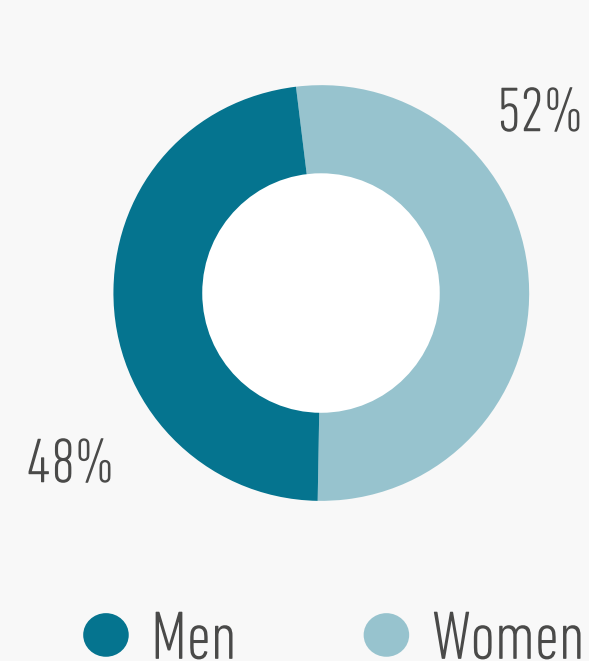
The Person

- I have an above average education, an average income and live in a small city or medium sized town.
- My children are grown and can take care of themselves.
- I have plenty of free time to take care of myself and to travel.
- I desire to get away from my daily routine and experience something new in my life.
- I want to enjoy life and eat well. I choose healthy options and prioritise my health.
- I care deeply about nature and the environment, I understand that the threat of climate change must be met and am willing to take action to do my part for nature.

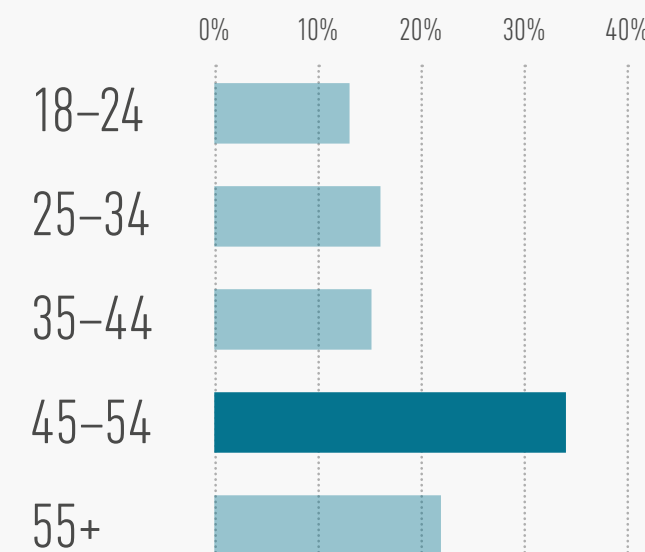
Keywords

- Authentic experience
- Introvert and small groups
- Seeking, inquisitive and convincing
- Culture and history

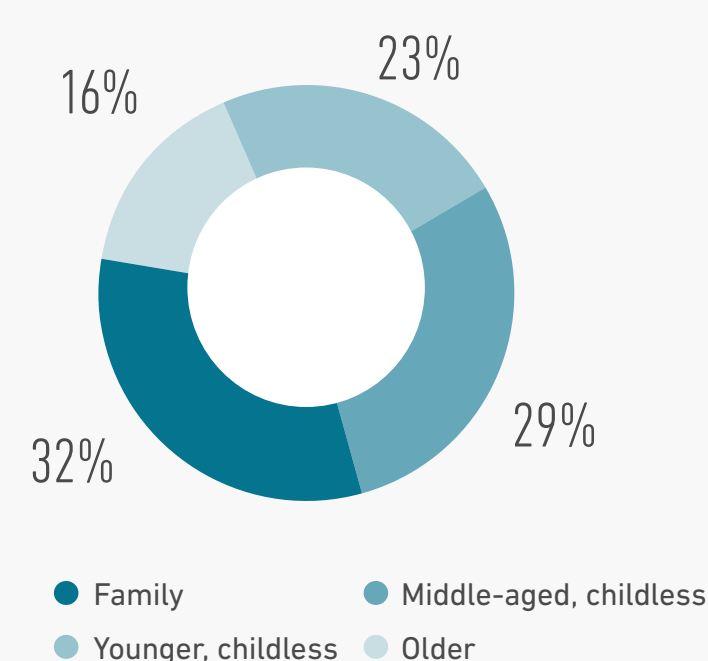
Sex ratio



Age



Life span



Top 10 interests

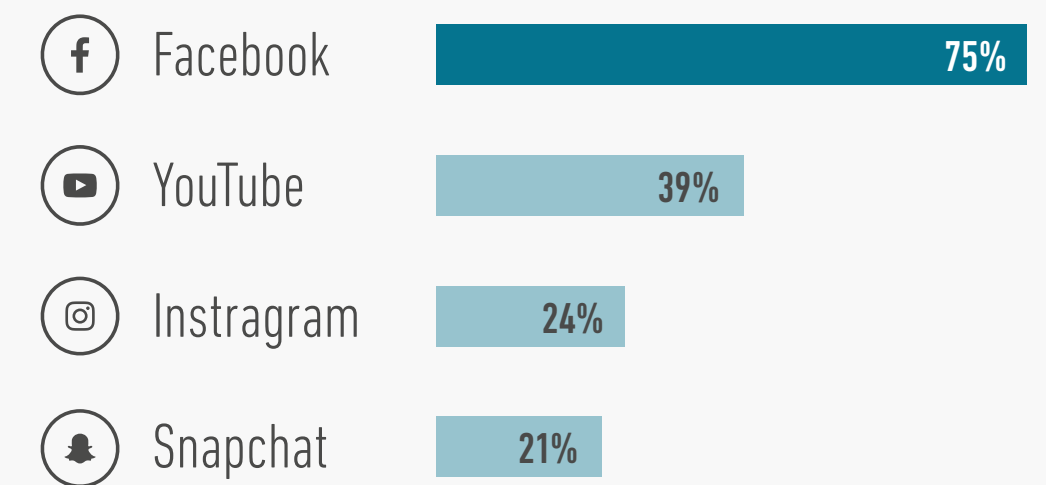
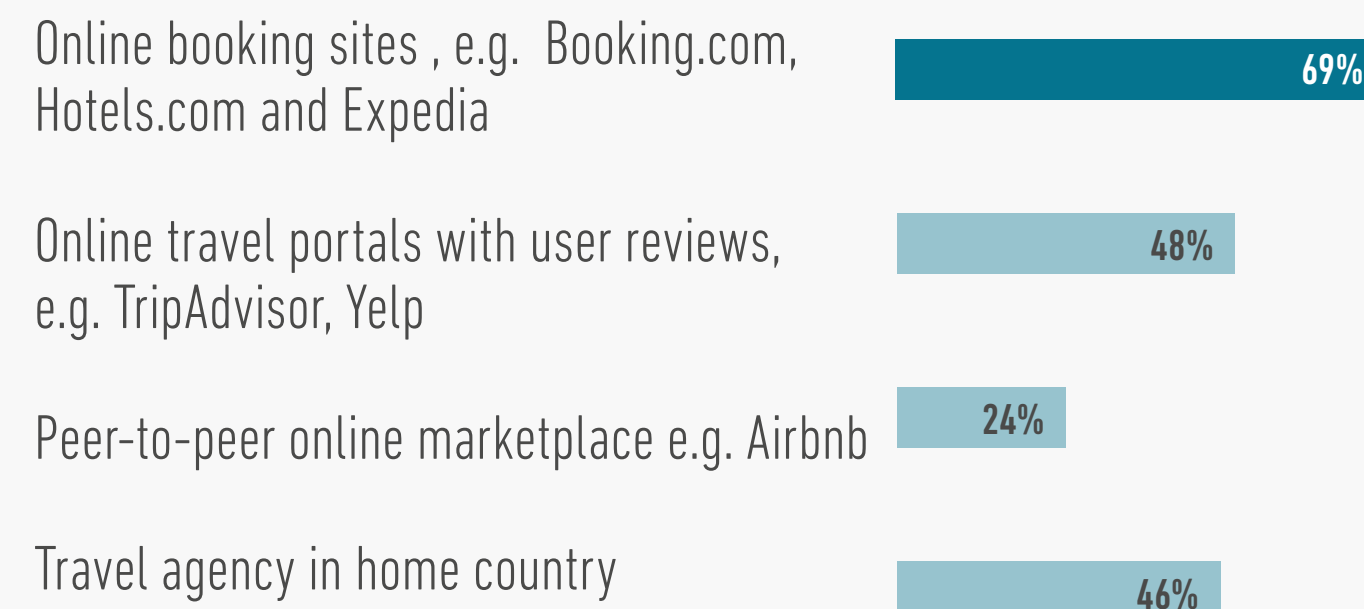
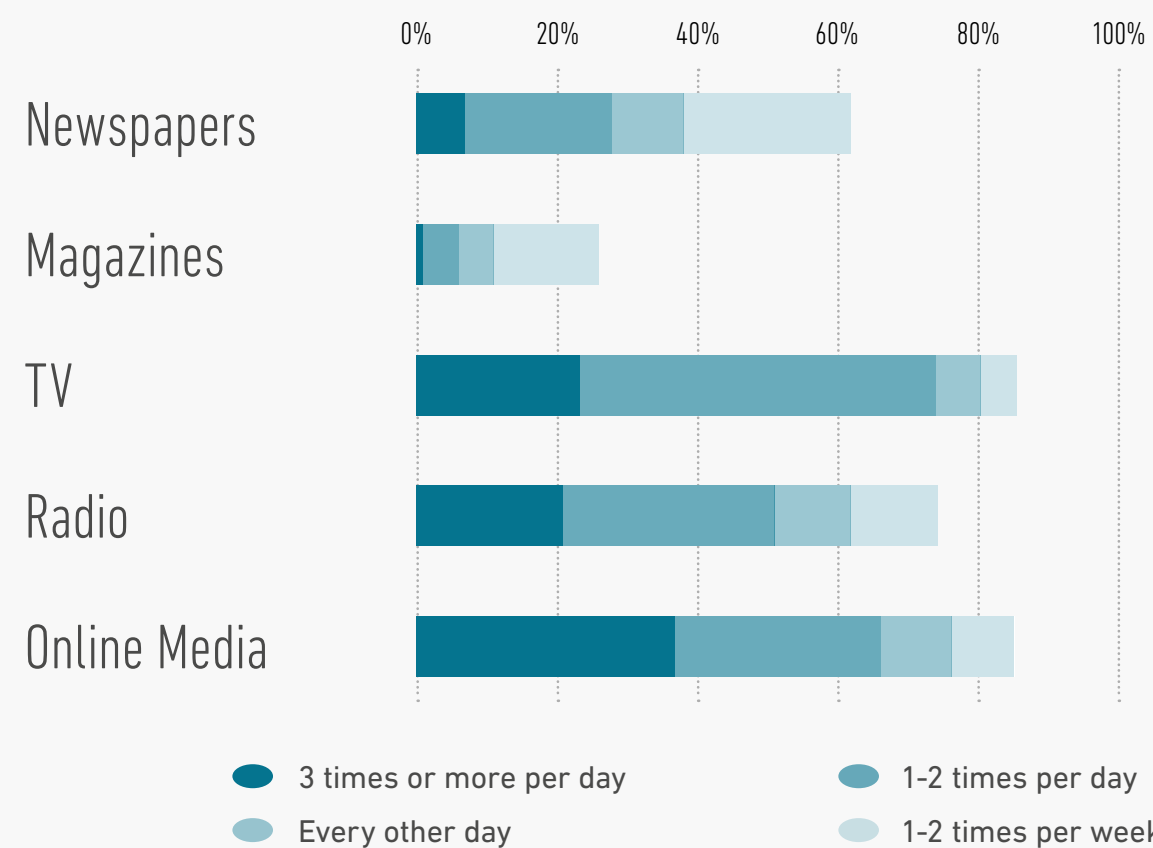
1. Walking
2. Reading
3. Gourmet / Fine food
4. Cycling
5. Hiking / Walking
6. Health / Natural Foods
7. Gardening
8. Gym / Fitness
9. Crafts
10. Visindi

The Consumer

- I am an active media user and try to learn new things and be conscious about what is going on in the world. I am not interested in glamour and the lifestyles of the rich and famous, I feel it is a waste of time. I do read newspapers but mostly use online media.
- I use Facebook to keep up with friends and family, but also use YouTube, Instagram and Snapchat to a lesser extent. I don't share many personal stories on social media.
- Recommendations from other travellers are important to me during the decision making process and I use Tripadvisor and similar websites.
- I prefer to book trips online, but also use travel agencies in my home country.
- I would probably not use new online booking portals such as Airbnb and Uber.



I am price-sensitive, don't enjoy shopping and don't buy things unless they have a practical value.





The Traveller



The Type

I desire to get away from my daily routine and experience something new. I travel to see different and unfamiliar things. I find destinations in the North charming and do not need warm days and sunshine. I like to learn about the destination that I visit and prefer to blend in with the locals than to feel like a "tourist". I prefer "real" communication to using social media online.

Planning

I prefer to travel in a small group and do not like being surrounded by tourists. I like to have free time, do not appreciate an overplanned schedule and do not need a lot of guidance. Time matters, I want to have the privacy to fully experience and dwell in the moment. I do not appreciate being in a hurry or under pressure when I am travelling. I am ready to pay for goods and services that meet my needs and have a practical value for me.

Experiences

I want to experience something different that is off the beaten track, but not something that is too challenging physically. I want to travel on my own terms, get in touch with nature and have enough time to learn at a museum or place of historical interest. I like to get to know the local culture and traditions, taste the food, chat with the locals and see the world in a new light with a local point of view.

Accommodation

I am pragmatic and don't want to spend more than necessary. Smaller hotels or guesthouses with a special or historical connection to the area appeal to me.



Tourism

I seek:

- Activities in nature
- Visiting places that are off the beaten path, smaller towns
And experiencing the local culture
- Restaurants with high quality local produce
- Museums and places of historical interest
- Communicating with the locals
- Swimming
- Wildlife and nature photography
- Festivals / Events

What I avoid on my travels:

- Circumstances where I am not in control, longer group trips and typical places with many tourists
- Any experience that may harm nature
- An inauthentic experience which is out of touch with the locals
- Spending time on social media





The Product

- Authentic Icelandic experience.
- Connection with the outdoors, wilderness and nature.
- Information about culture and history.
- A spiritual and physical challenge.
- Good, high quality, locally sourced food is a great advantage.
- Environmentally friendly.
- Smaller groups (20 pax max).

Message and Tone

- Tell the story and introduce the people behind the product.
- An exciting and authentic experience.
- What is the practical value of the product?
- Feedback from others that have tried the product matters.
- Mention your connection to the destination or locals.
- The environmental impact of the product matters to the group.

Media

- The target group follows the news and lifestyle media, mostly online.
- Emphasise PR, e.g. media trips and newsletters.
- The target group is active on Facebook but also uses YouTube, Instagram and Snapchat.
- Make sure your company is active in communications and responds quickly to requests, especially on Facebook.
- The Target group is active online and researches destinations and books online.
- Using SEO, keyword advertising and online ads / website banners to reach the target group when it is searching for products that are similar to yours.
- Advertisements in traditional media outlets are not effective for this group of travellers since they mostly source their information online.

Price

Do not need luxury accommodation, but are ready to pay more for an authentic Icelandic experience. Are price-sensitive and not spontaneous. They spend mostly on practical things.

Sales

- Other travellers' recommendations matter to this target group so it is good to show them reviews from other travellers, for example on TripAdvisor.
- Show that the product is environmentally friendly.
- Make sure that it is easy to book your product online by having a good website and/or being registered on popular booking sites.
- Make your company accessible online and be personal in communications.
- A large portion of this target group books trip through a travel agent in their home country.
- Joining a network of foreign travel agents may be a good idea.



Denmark:

The Cultural Comfort Seeker

% of the Danish market: 23%

—
Adventure-seeking within reasonable limits. Travels "in the present" and seeks to experience the local ambiance and culture firsthand. Good food, beautiful scenery and a lively culture make for the perfect experience. Chooses comfort and good service.

Value for Icelandic Tourism:

- Active traveller
- Seeks culture and information about the destination
- Cautious by nature and doesn't take unnecessary risks
- Ready to pay for quality, service and products.
- Cares about the environment and protecting nature



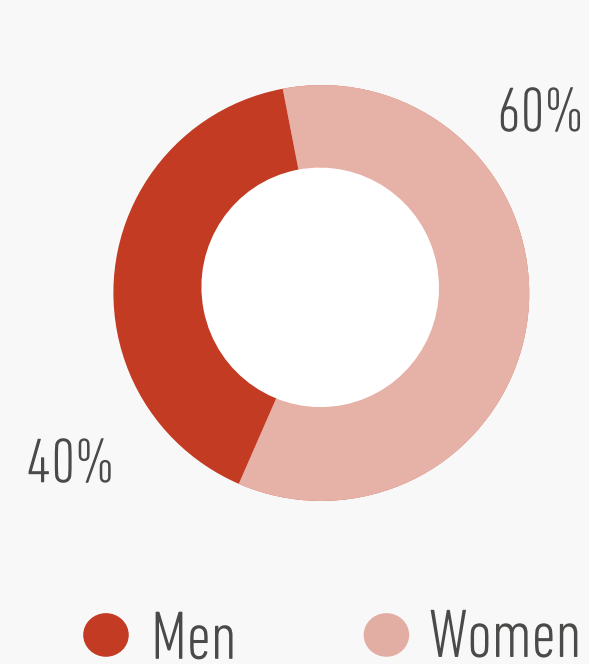
The Person

- I have an above average education, a high income and live in a city or town.
- My children are grown and can take care of themselves.
- I am in the later stage of my career and travel less for work and more to enjoy life.
- I have plenty of free time to take care of myself and to travel, and can afford to do so.
- I want to enjoy life and eat well. I choose healthy options and prioritise my health.
- I enjoy shopping and buying new things.
- I care deeply about nature and the environment, I understand that the threat of climate change must be met and am willing to take action to do my part for nature.
- I don't take unnecessary risks but enjoy new experiences.

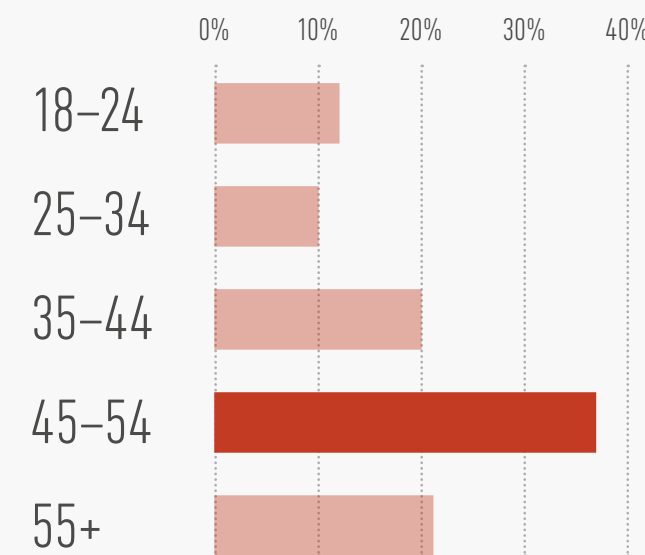
Keywords

- Fashionable, shopping, brands
- No bother and safety
- Introvert and seeking
- Culture and history
- Inquisitive

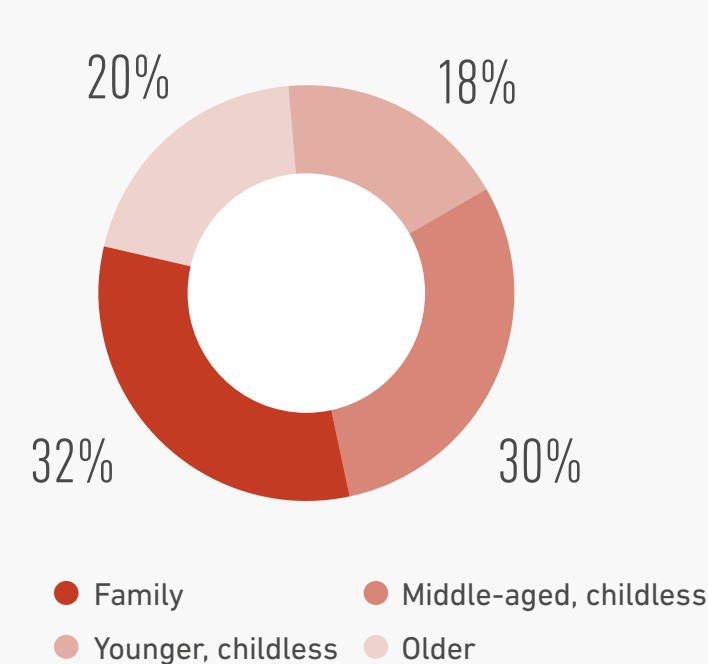
Sex ratio



Age



Life span



Top 10 interests

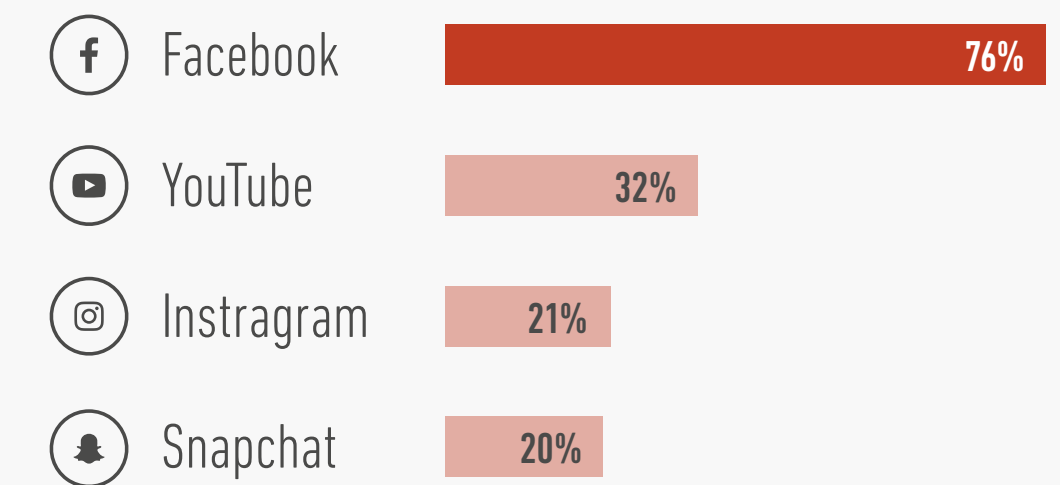
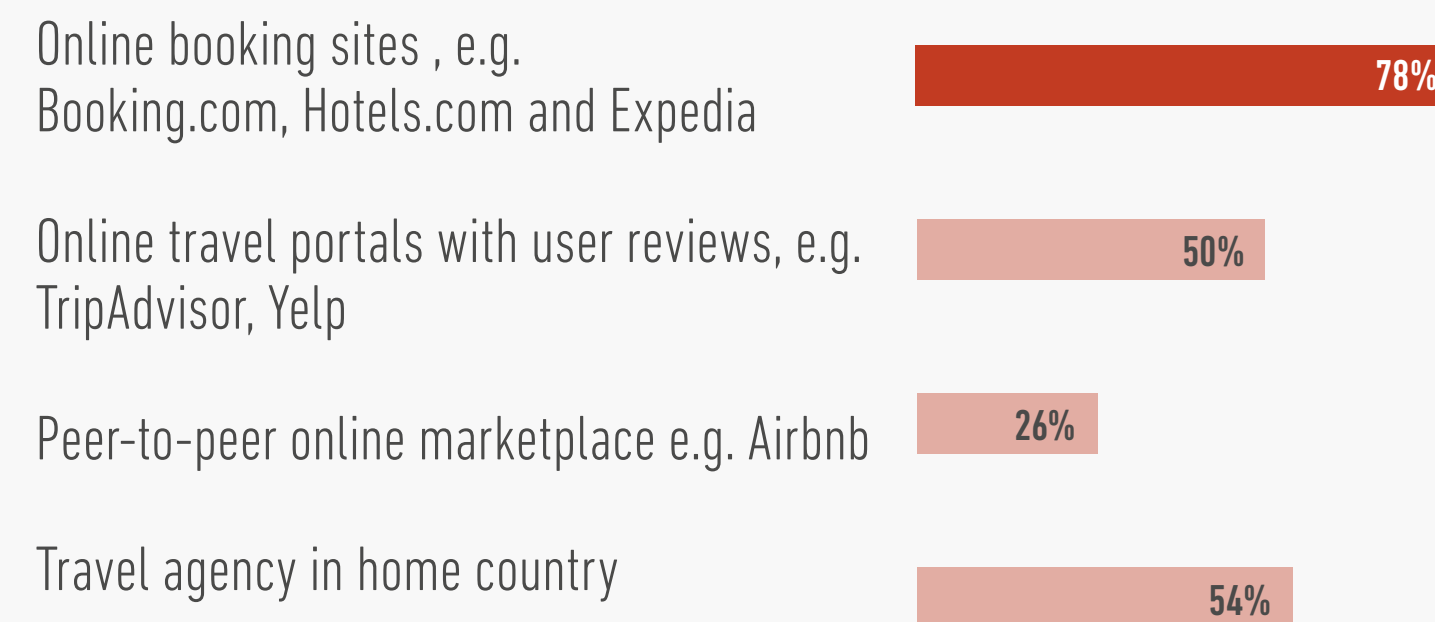
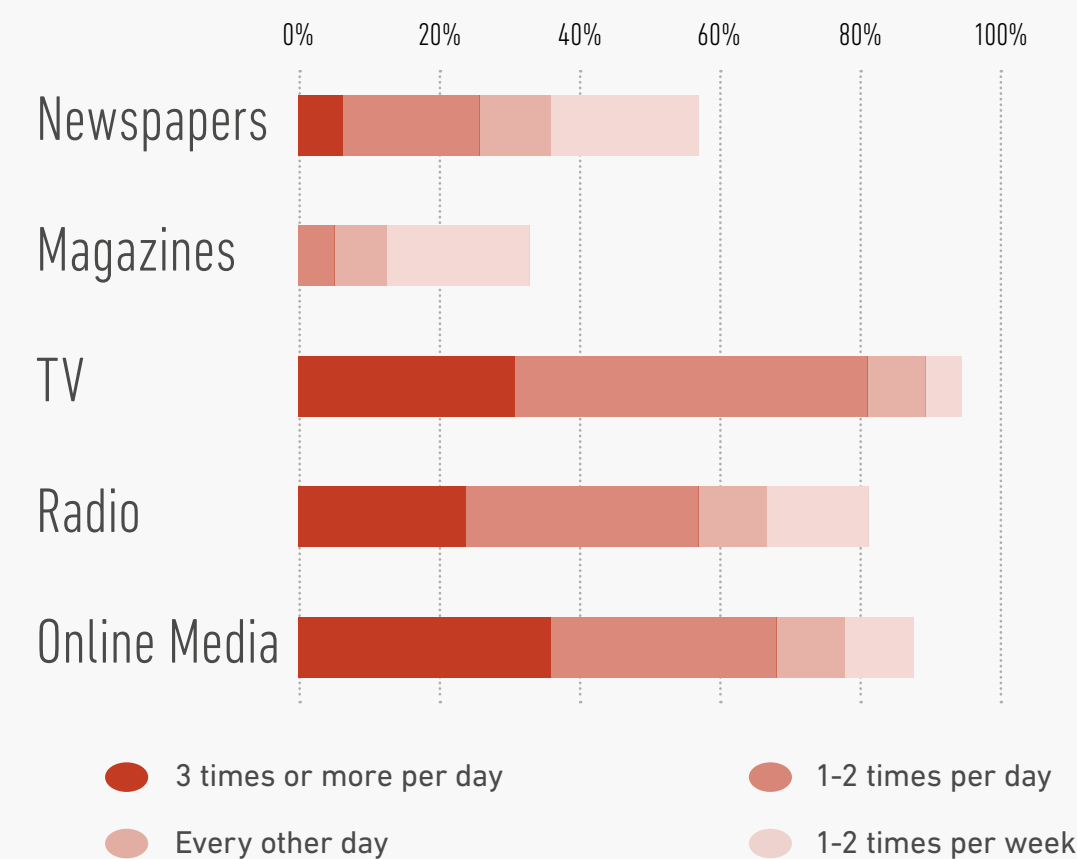
1. Reading
2. Walking
3. Gourmet / Fine food
4. Health / Natural Foods
5. Fashion / Clothing
6. Cycling
7. Gardening
8. Gym / Fitness
9. Photography
10. Home Decorating / Furnishing

The Consumer

- I am an average media user and mostly use TV, radio and online media outlets.
- I enjoy following fashion.
- I am not very active on social media but mostly use Facebook, and YouTube, Instagram and Snapchat too to a lesser extent. I don't share many personal stories on social media.
- I am rather conservative technologically speaking, but use TripAdvisor to some extent when making decisions.
- It is unlikely that I would use new online booking services such as Airbnb and Uber.
- I enjoy shopping and can be a bit spontaneous.
- I am not very price sensitive but appreciate a good offer.



I prefer to book trips online but also use travel agencies in my home country.





The Traveller



The Type

I am an active traveller and try to travel as often as possible to get away from my everyday routine and experience something new. I enjoy getting to know the destination I visit and prefer not to feel like a "tourist" but to blend in with the locals. I prefer "real" communication to using social media online although I do use social media in order to keep in contact with friends and family.

Planning

I prefer to travel in a small group and do not like being surrounded by tourists. I like to have free time and do not appreciate an overplanned schedule. I usually travel in summertime and the safety of the destination is important to me. Comfort, quality, service, safety and simplicity matter to me. Travelling should be easy, not challenging.

Experiences

I have a keen sense of adventure and enjoy trying new and exciting things, but nothing that is physically challenging or dangerous. I like to spend a long time at museums and places of historical interest and learn. I want to get to know the local culture and traditions, taste the food, chat with the locals and see the world with their eyes.

Accommodation

Accommodation options with better service, more luxury and are fashionable appeal to me.



Tourism

I seek:

- Dining at restaurants with locally sourced, high quality food
- See beautiful landscapes and visit well-known natural attractions without much effort
- City breaks with cultural experiences
- Visiting small towns and experiencing the local culture
- Museums and places of historical interest
- Swimming / Spas and wellbeing
- Festivals / Events
- Shopping for Icelandic design
- A hotel with good service and great facilities

What I avoid on my travels:

- Physical challenge
- Unorganised tours with little service
- Sharing my experience online on social media
- Unnecessary risks and trips off the beaten track



Denmark

The Product

- Easy in practice, safe and fun.
- Better quality and service.
- Information about culture and history.
- Offers relaxation, spa and/or “rejuvenation”.
- Authentic “local” experiences greatly enhance the value of the product.
- Well organised with no surprises.
- Good, locally sourced food is a great advantage.
- Smaller groups (20 pax max).

Message and Tone

- Accessible and unique experience.
- Other consumer’s reviews matter.
- The spiritual stimulation from the product.
- The target group appreciates a good offer and quality.
- Mention your connection to the destination or locals.

Media

- Mixed media with emphasis on online media and TV.
- The target group is not very active on social media but mostly uses Facebook and also YouTube, Instagram, and Snapchat to a lesser extent.
- Not likely to follow outdoors-related things, rather lifestyle.

Price

Probably not as price-sensitive as other groups but a higher price must reflect better quality and services. Respond well to special offers.

Sales

- Other travellers’ recommendations matter to this target group so it is good to show them reviews from other travellers, for example on TripAdvisor.
- Make sure that it is easy to book your product online by having a good website and/or being registered on popular booking sites.
- A company’s experience and safety matter during the decision making process.
- Make sure your company is easily reachable online and by phone and be personal in all communications.
- A large portion of this target group books trip through a travel agent in their home country. Joining a network of foreign travel agents may be a good idea.

MARKET SNAPSHOT PREPARED BY PROMOTE ICELAND

APRIL 2019

Promote Iceland aims to enhance Iceland's good image and reputation, to support the competitive standing of Icelandic industries in foreign markets, to attract foreign tourists and investments to the country, and assist in the promotion of Icelandic culture abroad.

www.promoteiceland.is