

Denmark

Market & Trade Profile



DENMARK

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Updated January 2006

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1) Market Snapshot

GENERAL MARKET CONDITIONS

- Population 5.4 million – growing and aging
- **IMF Forecasts 2006:** GDP (based on PPP per capita) USD\$36,083. GDP Growth Rate 2.1%. Unemployment 5.5%. Inflation 1.8%

ACCESS OVERVIEW

- NO visa required
- **Departure gateways** – Aarhus, Copenhagen, Billund and Esbjerg.
Arrival gateways – London (LHR, LCY, LGW, STN), Birmingham, Manchester, Glasgow, Edinburgh, Aberdeen, Newcastle
Departure port – Esbjerg
Arrival port – Harwich

MARKET SIZE / MARKET SHARE

- 7.6 million outbound in 2004. UK has 6.2% market share
- UK ranked 5th outbound destination (top 3: Sweden, Germany and France)
- 476,000 visits in 2004 (+14% on 2003)
- £188m spent in 2004 (+25% on 2003). AEV £394; AED £80

MARKET SHAPE / MARKET DYNAMICS

- 37% are BUSINESS; 28% each HOLIDAY & VFR visitors
- 83% stay 1-7 nights
- 57% visit between July – December
- Top Towns = London, followed by Birmingham, Edinburgh, York and Manchester

PRODUCT / MARKET FIT

- History / Heritage / Culture, Landscape, Cities, Sport and Activity Holidays, Touring

DEMOGRAPHICS / POTENTIAL CONSUMER SEGMENTS

- Youth, DINKS, Empty Nesters, VFR, Conference & Incentive

REACHING THE DANISH CONSUMER

- Internet access 70%



2) General Market Conditions

Population / Languages

The US Census Bureau put the population of Denmark at 5.4 million in 2004.

The population is forecast to increase to 5.6 million by 2014. The proportion of the population aged 25-39 is forecast to decline, whilst the proportion aged 60-79 is forecast to increase.

Languages: Danish, Faroese, (Faroe Islands), Greenlandic (Greenland)

Economics / Politics

The right-of-centre minority coalition government, consisting of the Liberal Party and the Conservative People's Party, is secure in government following its election victory in February 2005.

Economic growth has been stronger than in many other western European economies during 2005, with the Economist Intelligence Unit forecasting a continued healthy performance during 2006.

Following the lead of the European Central Bank the Danish Central Bank increased base rates by 1/4% in December 2005. Unemployment has fallen during the past year, and is now considerably lower than the EU average.

One feature that Denmark shares with most of the other Nordic economies is its high level of state expenditure to total economic activity, which is now among the highest in the world.

Holidays / Annual Leave

Danish employees receive a minimum of 25 days annual leave.

Danish people regard holidays as a high priority and many take 3-4 breaks during the year, which helps achieve seasonal spread targets. Nordic domestic holidays are popular in the summer months.

3) Access Overview

Political Situation

No political issues currently exist to restrict travel to Britain from Denmark.

Passport and Visa Issues

Danish visitors do NOT require a visa to visit the UK.

Gateways / Access to Britain

In 2004, 91% of visitors from Denmark travelled to the UK by air, 7% by sea and 2% by tunnel. (IPS)

Departure gateways – Aarhus, Copenhagen, Billund and Esbjerg.

Arrival gateways – London (LHR, LGW,LCY, STN), Birmingham, Manchester, Glasgow, Edinburgh, Aberdeen, Newcastle

Departure port – Esbjerg

Arrival port – Harwich

Flights

Aarhus - 12 flights per week with Ryanair to Stansted

Billund - 6 flights per week with BA to Birmingham, 18 per week to Gatwick with Sterling and 12 per week to Manchester with BA

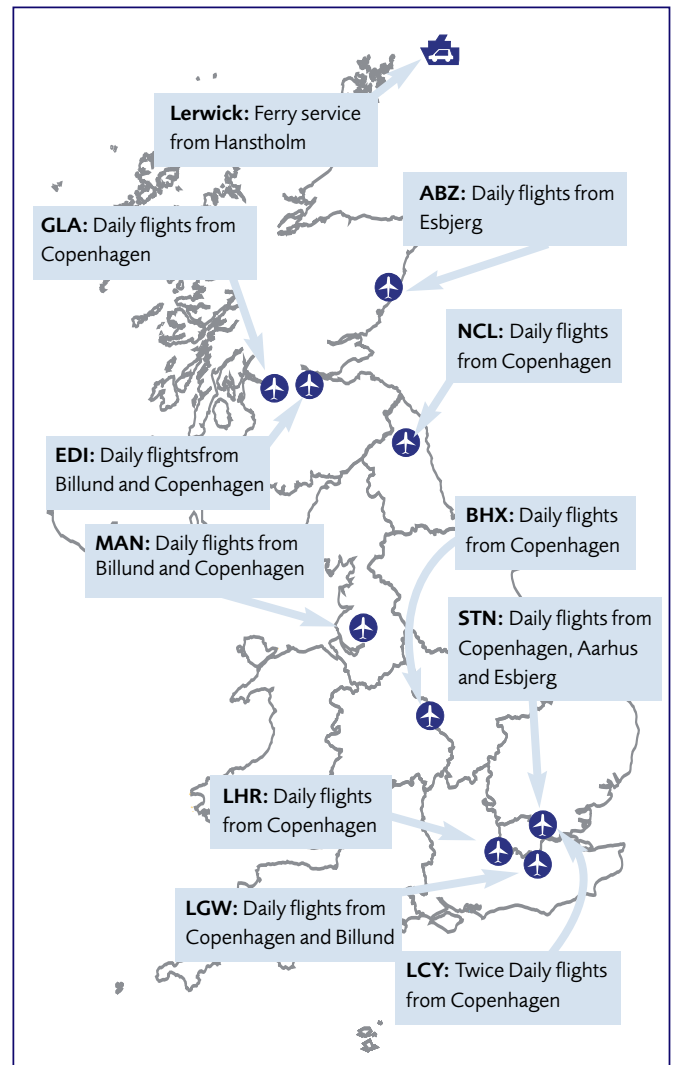
Esbjerg - 6 flights per week to Aberdeen with bmi and 7 per week to Luton with Ryanair

Copenhagen - most major UK airports have direct access from Copenhagen, during the course of a week 243 flights depart Copenhagen for the UK

Typical flight time to the UK from Denmark is 1 hour 20 minutes

Ferries

Esbjerg to Harwich - 3 sailings per week, crossing time 16 hours



4) Market Size / Share

Current & Forecast Market Size

Global Insight estimate that there were 7.6 million outbound overnight visits from Denmark in 2004.

There are forecast to be 9.3 million such trips by 2010, an increase of 22%.

UK currently accounts for around 6.2% of outbound trips from Denmark.

Current Volume and Value Statistics / Trends

	2003	2004	Change year on year
Total Visits	419,000	476,000	+14%
Visits Rank (League Table No. Visitors to UK)	14	15	Down 1 place
Total Spend	£150m	£188m	+25%
Spend Rank (League Table £ Spend in UK)	18	17	Up 1 place
Average Spend per Visit (AEV)	£357	£394	+10%
AEV Rank	Outside top 30 rankings		
Average Spend per Day (AED)	£78	£80	+3%
AED Rank	10	9	Up 1 place

Source: IPS

2004 was the best ever-recorded year for visits and 1999 was the best year for spend (£198 million).

Key Competitor Destinations – actual

Global Tourism Navigator shows us that UK was 5th in the actual ranking of top destinations (short and long haul included) for Danish outbound travel in 2004. Sweden, now linked to Denmark by a fixed link, attracts more Danish visitors than any other outbound market, with Germany the next most visited country.

1	Sweden	6	Norway
2	Germany	7	Greece
3	France	8	Austria
4	Spain	9	Italy
5	UK	10	Turkey

Key Competitor Destinations - aspirational

According to the Anholt-GMI Nation Brands Index (Wave 3 2005), which surveys a representative n=1000 sample of the online population in Denmark, UK is ranked 4th out of 24 destinations that would be likely for a leisure visit "if money were no object".

1	Australia	6	Spain
2	New Zealand	7	Italy
3	Canada	8	Ireland
4	UK	9	Brazil
5	US	10	Japan

5) Market Shape / Dynamics

Purpose of Visit

28% of the visitors from Denmark to the UK come for the purpose of a holiday. This proportion has consistently decreased over the past 6 years.

The same proportion travel to the UK in order to visit friends or relatives. This proportion has constantly increased in the past 6 years.

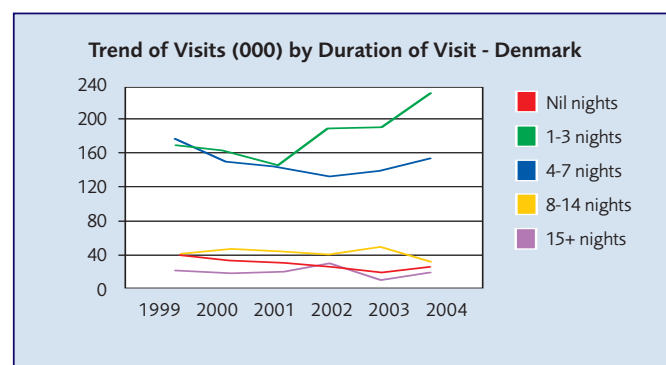
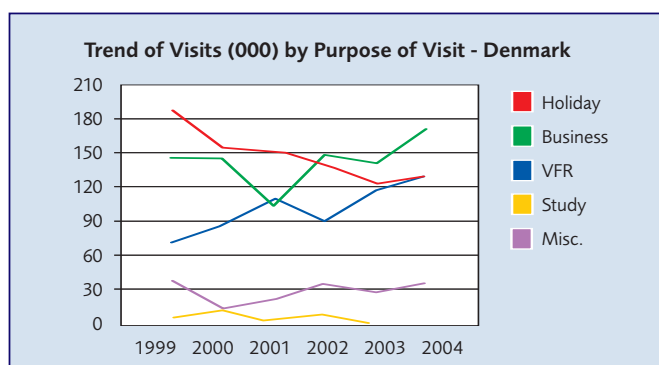
37% travel to the UK for business purposes and account for 44% of the overall expenditure.

Length of Stay

89% of Danish visitors stay in the UK for less than 8 nights and 50% stay in the UK for only a short break (1-3 nights).

The Holiday short-break market accounts for 42% of Holiday visits and 41% are 4-7 nights stays.

VFR visitors tend to stay slightly longer with 23% staying in the UK for 8 nights or more



5) Market Shape / Dynamics

Regional Spread / Top Towns

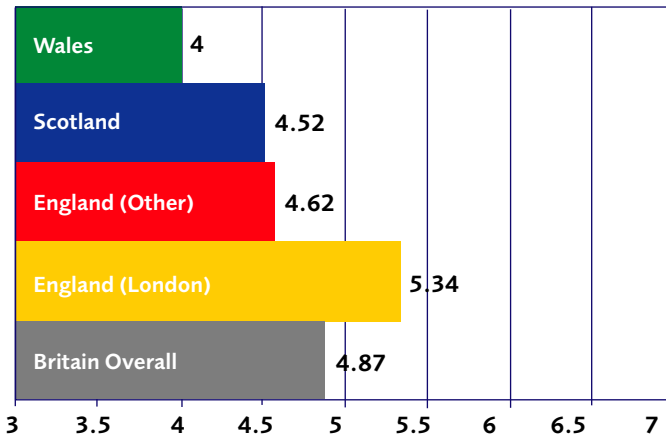
In 2004, 88% of visitors from Denmark stayed in England, 50% visited London, 5% visited Scotland and 3% visited Wales (IPS).

The Top Towns for Danish visitors in 2004 were:

		Visits (000)
1	London	238
2	Birmingham	23
3	Edinburgh	10
4	York	8
5	Manchester	7

The GMI Nation Brand Index research (2005) asked 1,000 Danish respondents about their awareness of the regions of Britain. Participants were asked how well they felt they knew the regions of Britain – giving a score of 1-7 and taking into account any of the ways they had learned or heard about each region. 1 = never heard of the region and 7 = know the region very well.

The chart below shows that London is the best-known region for Danish respondents, followed by Britain overall. The rest of England, excluding London, is better known than Scotland and Wales is the least well known.



Looking at the 625 Danes who had visited Britain, the mean scores for all regions increase, particularly for London (up to 5.63).

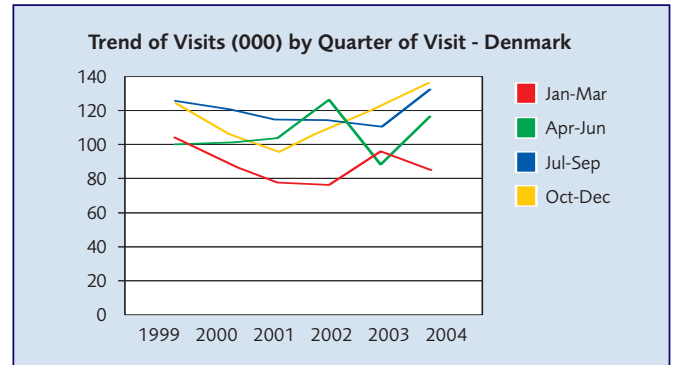
Just over half of all Danish visitors prefer the warmer months between April and September to visit the UK (53%).

The least popular time for Danish holidaymakers to visit the UK is between January and March.

Those visiting friends and relatives prefer to do so at the end of the year in the last quarter (31%).

Business visits are fairly evenly spread over the 4 quarters.

Accommodation Type

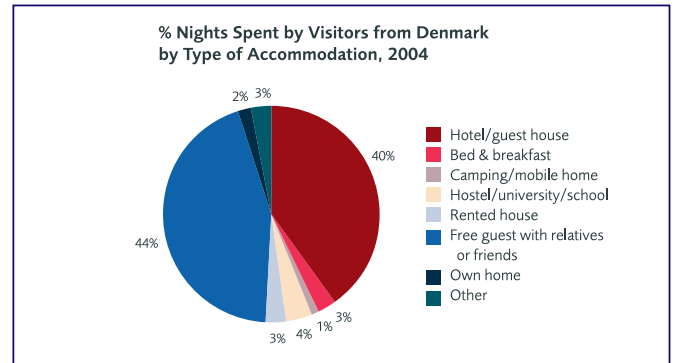


60% of Danish visitors stay in a hotel or guesthouse when they visit the UK, which accounts for 40% of the nights spent.

72% of Holiday visitors stay in a hotel or guesthouse, 16% stay as free guests with friends or relatives, and 7% stay in B&Bs.

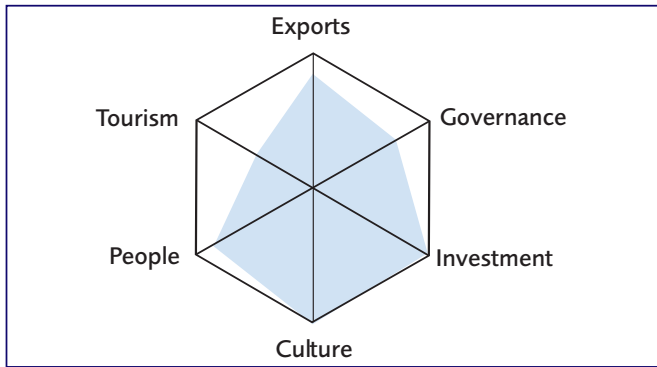
85% of VFR visitors are free guests who stay with friends or relatives.

87% of Business visitors stay in a hotel or guesthouse.



6) Britain's Brand Image in Denmark

The bigger picture – Britain as a “nation brand”



The Anholt-GMI Nation Brands Index (Wave 3 2005) is an online panel survey of 1000 Danish respondents. The 6 points of the hexagon are made up of several different questions, which compare 24 countries as Nation Brands.

Overall the Danes rate the UK in first place for both CULTURE and INVESTMENT, demonstrating a love of British culture and a willingness to live and work in the UK. The Danes have a positive perception of the British people and products made in the UK, ranking both PEOPLE and EXPORTS in 5th place. GOVERNANCE is in 8th place and TOURISM receives the lowest ranking in 14th place, with the Danes putting Australia, New Zealand and Italy in the top three positions.

CULTURE

Danish respondents rate the UK highly as an interesting and exciting place for contemporary culture such as music, films, art and literature, in second place after the US. The UK is in 8th place for rich cultural heritage – with Egypt, China and Japan receiving the highest scores. The US, Russia, Germany and the UK are countries that the Danish respondents perceive to excel at sport.

PEOPLE

The Danes believe they will be made to feel the most welcome visiting Australia, New Zealand and Canada; the UK is in 8th position. The UK moves up the ranks when it comes to having a close friend, in 4th place behind Australia, Canada and New Zealand and is even further up in 2nd place when it comes to employing someone from the UK.

TOURISM

If money were no object the Danish respondents would most like to visit Australia, New Zealand, Canada and the UK. The Danes consider the UK to be a country rich in built heritage / historical heritage (8th), but not as rich in natural beauty as many of the other countries on the NBI index (19th).

GOVERNANCE

The Danish respondents have a fairly good impression of governance in the UK. They believe the country is competently, honestly and fairly governed (6th). The UK is also perceived to respect the human rights of its citizens and treat them with fairness and behave responsibly towards international concerns over the environment and world poverty (both ranked 8th). As a country that behaves responsibly in the areas of international peace and security, the UK is ranked in 9th position.

EXPORTS

Japan, US, Germany and the UK are countries perceived by the Danes to make a major contribution to innovation in science and technology and products made in Sweden, Germany, Switzerland and the UK are all rated highly.

INVESTMENT

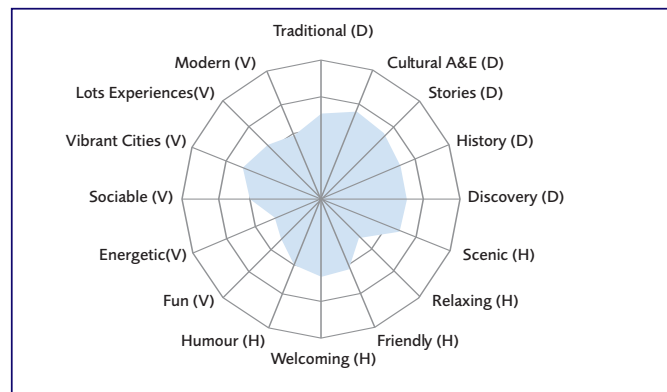
Danish respondents would be happy to live and work for a substantial period in Australia, New Zealand, Canada and the UK and perceive the US and the UK to be good places to study for educational qualifications.

Britain as a Destination Brand – DEPTH, HEART & VITALITY

Wave 3 2005 of the Anholt-GMI Nation Brands Index, included questions to measure perceptions of Britain as a holiday destination on attributes related to Britain's brand values, DEPTH, HEART & VITALITY.

In the NBI, 1000 Danish participants rated Britain on a scale of 1-7, where 1 was "poor" and 7 was "excellent" and overall, they gave a range of mean scores from 4.73 – 5.38 across the 16 attributes.

This is a simplified diagram showing the relative strengths of the different brand attributes. People were asked to rate Britain on each attribute on a scale of 1-7 (where 1 = poor and 7 = excellent). As nobody rated below 4 or above 6, the diagram below has a mid-point of 4 and an outer rim of 6. Basically, the closer the shading to the outer rim, the better the perception of Britain on that attribute!



The Danish people rate DEPTH as Britain's strongest brand value overall, particularly lots of cultural events and attractions, fascinating stories and always something new to discover.

As well as a strong perception of Britain's history and heritage the Danes admire Britain's natural scenic beauty, which is the highest-ranking HEART value. The Danes also consider the British people welcoming and friendly, other HEART attributes.

On the VITALITY attribute Britain is perceived as having vibrant and exciting cities.

Weaker areas are perceptions of Britain on the VITALITY attributes of being energetic and fun and the HEART attribute of being relaxing.

Looking only at the 625 Danish participants who had ever visited Britain, perceptions on all attributes improve.

7) Product / Market Fit



What products / experiences are most attractive to Danish visitors?

History / Heritage / Culture

As demonstrated in the Brand Index research, Danish people have high opinions of Britain's Culture. Danish people are very Anglophile in their outlook and they travel to Britain for the cultural experience in the broadest sense. They place great emphasis on the friendliness of the British people and feel they will be made to feel welcome on a holiday to Britain.

The research also highlighted that the Danes rate Britain highly for having lots of cultural events and attractions and also stories surrounding the history.

Landscape and Countryside

Along with Britain's cultural attractions, the landscape and countryside also has strong appeal.

Cities

The Brand Index research demonstrated that Britain is perceived by the Danes to have vibrant and exciting cities.

There are direct flights to Aberdeen, Birmingham, Edinburgh, Glasgow, Manchester and Newcastle, which will encourage Danes to explore a variety of Britain's cities.

In particular, London remains the most popular destination outside the Nordic region.

Like other nationalities, Nordic people also visit London to enjoy the multitude of attractions of a large city; shopping, cultural events, sports events and theatre.

Musicals in general are incredibly popular and the demand for tickets is extremely high.

Sport and Activity Holidays

There is a strong interest for niche and experiential products such as golf. 4% of Danes are regular golfers and the number of golfers in Denmark is constantly increasing and has been every year since 1949! (Source: Dansk Golf Union–The Danish Golf Association)

Walking and cycling are also popular activities for the Danish traveller.

Special interest or activity-led holidays have become more important. People are looking for destinations where they can pursue these interests and activities.

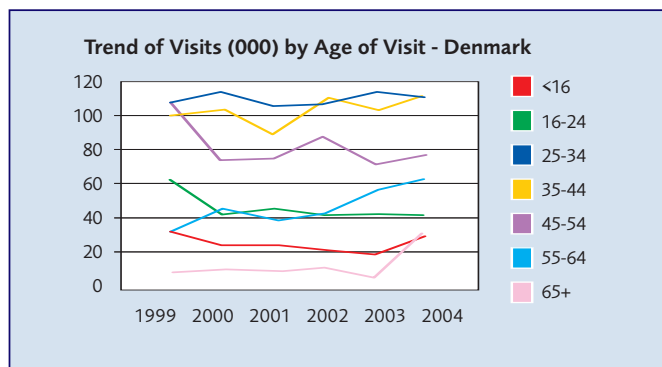
The Danes are also interested in spectator sports, primarily football.

Touring

During the summer months, Britain is mainly toured by car or by public transport. The most popular areas are the South of England and the heart of England.

8) Who is the Danish visitor?

Demographics



	Male %	Female %
0-15	6	8
16-24	5	16
25-34	24	23
35-44	29	15
45-54	17	15
55-64	9	20
65+	10	3

Source: IPS

48% of visitors from Denmark are aged between 25 and 44.

53% of those visiting friends and relatives are under 35 years of age.

23% of Danish holidaymakers are aged over 54 years, which is over twice as many as the same group in 1999.

Travelling Group 2003	% of Visits
Lone traveller	41
As a couple/with partner	22
Group of friends	8
Family group	16
Business colleagues	10
Tour group	3
Don't know	1

In terms of Travelling Group – 41% of the Danish visitors were lone travellers in 2003.

Visitors travelling as a couple were the second largest segment of group composition (22%).

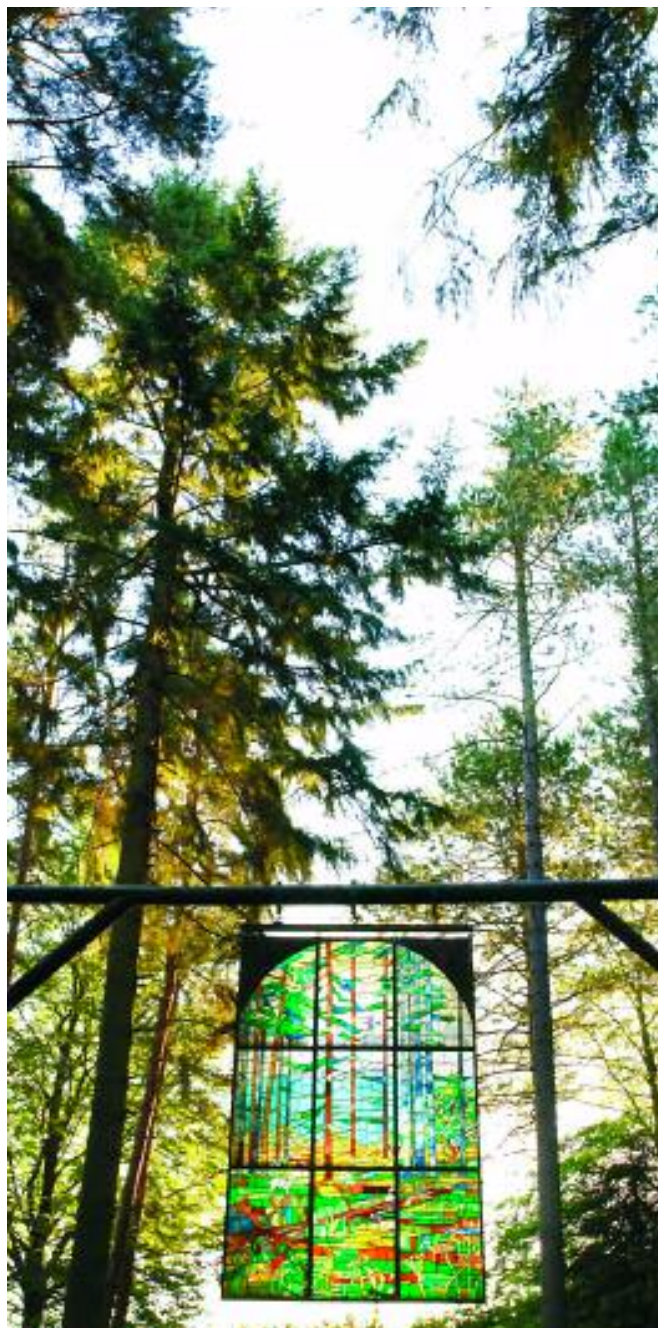
VB Key Market Segments

Traditionally VisitBritain has identified the following as key segments:

- 'Youth'** - Young people aged 18-24, mainly visiting London or other cities. It will be their first or second visit to Britain.
- 'DINKS'** - (Double Income No Kids), aged 20-39, taking a main holiday or city break with friends.
- 'Empty Nesters'**, taking a main holiday or short country break with friends.
- Conference and incentive travellers.**
- Visiting Friends and Relatives (VFR)**

1st Timers & Repeat Visitors

In 2004, 84% of visitors from Denmark had visited the UK previously within the last 10 years (IPS).



9) Caring for the Danish Consumer

Language / Information provision

Nordic people have a good command of the English language and generally don't mind receiving information or brochures in English. However, if you take the trouble to get your brochures translated you will create an enormous amount of goodwill!

Do not even think of distributing your brochures in any Nordic country unless they are printed in English or in the language spoken in that country. Although Nordic residents can read and understand each other to a certain level, they will NOT accept brochures printed in a Nordic language other than their own.

Nordic people are very proud of their origins and don't like to be mistaken for another nationality, just because their languages may sound identical to British ears. Danes don't understand one word of Dutch, there is rivalry between Swedes, Danes and Norwegians, and Finland is not a former colony of Russia. If you are uncertain, just ask from which country they originate.

In general, Nordic people like to seek detailed information and plan their holidays before setting off to foreign countries. They like to get close to the 'natives', they are adventurous, and like to go off the beaten track. They are generally friendly people and expect others to be the same. If they happen to spend the night in a luxury hotel and meet an unfriendly staff member, they will remember that person and tell 20 others about it! Generally speaking, they are very easy going and flexible.

Nordic people are often very conscious of environmental issues, so any efforts on the part of the British supplier to show how much they care for the environment will help.

Accommodation

Popular types of accommodation are B&Bs, self-catering properties or country house hotels.

When it comes to accommodation, Nordic people are used to very high standards of facilities and cleanliness. En-suite bathrooms are essential. Tiled bathroom floors and wooden floors in the bedrooms are certainly preferable to carpeted ones. Smoke-free rooms are also very much appreciated.

A warm welcome is considered important, especially as the British are seen as very friendly.

Value for Money

The Danes are very price-conscious and expect value for money and efficiency.

10) Reaching Danish Consumers

Deciding, planning & booking patterns

There is a trend for last minute travel in Denmark and also for short-break, low-budget travel, suggesting the timeline for deciding, planning and booking a holiday is very short.

Because of many low cost flights, Danes take the opportunity to travel to Britain for a specific event or show and this is often last minute.

More Nordic people are travelling to Britain independently with the increase in internet usage.

Because of high IT and Internet usage, it is common practice to shop online. Holidays – whether last minute short breaks or longer charter holidays – are among the most popular commodities purchased online. Travel agents are the biggest losers, as customers book direct with carriers and hotels. This trend will only increase with the introduction of high-speed Internet connections.

There are a large number of travel agents and operators, who are adapting to modern times and have made many of their products bookable on-line.

There are a number of operators catering for those who look for specialised trips which are less price-sensitive than the ordinary travel package. These holidays are normally not bookable on the internet, e.g. garden tours, historical tours, tours to musical events, motorsports tours, riding holidays, walking holidays, etc.

Online Environment

70% of the Danish population are online (Source: European Travel Commission, 2005)

Denmark is among the leading countries in internet penetration, with expectations that the internet user population will grow from 3.7 million in 2004 to 4.3 million in 2007, according to the Computer Industry Almanac(2004).

According to the Swedish Institute for Transport and Communications Analysis between 30% and 40% of the population across Scandinavia accessed the Internet on a daily basis in 2003.

The Swedish Institute also highlighted how high mobile phone ownership is in the Nordic region – in Denmark around 85% of the population own a mobile telephone.

In Denmark there has been a boom in the sale of travel on the Internet. Over the last couple of years online travel agencies have doubled their turnover each year.

Media Habits

There are six Danish national daily newspapers which all have special holiday sections once a week. In addition a large number of regional papers feature travel articles, as well as a number of magazines and other publications covering almost all interests.

Business tourism is also dealt with regularly in special supplements by the big national papers. There is one commercial TV station and several regional TV and radio stations. The importance of the Internet as an advertising medium is also increasing rapidly.

10) Reaching Danish Consumers continued

Consumer Press

(main national newspapers with travel section)

Berlingske Tidende

National daily newspaper with net circulation of 152,000. Sunday edition 184,000 copies. Special travel section on Saturdays.

Morgenavisen Jyllands-Posten

National daily newspaper with net circulation of 180,000. Sunday edition 240,000. Travel and leisure section on Saturdays.

Politiken

National daily newspaper with net circulation of 142,000. Sunday edition 177,000 copies. Travel section on Tuesdays.

B. T.

National daily newspaper (tabloid) with net circulation of around 121,000. Sunday edition 149,000. Travel section on Tuesdays.

Travel trade press

Take Off

Travel Trade Magazine of Scandinavia. Monthly travel trade magazine read by travel trade in the Nordic countries.

Stand By

Monthly travel trade publication read by the travel trade in the Nordic countries. Circulation: 21,000

Consumer Fairs

Ferie is Denmark's main travel exhibition held annually in Copenhagen (January). Due to the opening of the bridge between Denmark and Sweden the exhibition is attended by both Danish and Swedish travel trade, press and consumers. Just under 47,000 people visited the exhibition in 2005.

Ferie for Alle - The golf exhibition within the holiday exhibition Ferie for Alle is the biggest and most important golf exhibition in Denmark. The exhibition takes place at the Herning Exhibition Centre in Jutland each February. In 2005 the golf exhibition was visited by 26,000 dedicated golfers, searching for inspiration for their next golfing holidays



11) The Trade

Overview of trade structure

There are around 1,000 tour operators and travel agencies in Denmark, with a large number of sales outlets; even the Danish tourist information centres act as sales outlets for the local communities. Most major operators are in Copenhagen, although you will also find a number of important operators in the larger cities.

The Association of Danish Travel Agents and Tour Operators (Danmarks Rejsebureau Forening www.drif-dk.dk) is the official trade association with 300 members.

A few large charter companies dominate the leisure travel market in Denmark. In addition, there are four large wholesalers, a number of medium-sized operators and small specialist tour-operators with niche products. The large ferry and tour operator, DFDS Seaways, is one of the biggest operator to Britain. Like the large tour operators, it sells its products in travel agencies all over the country.

Main types of Britain packages sold through the travel trade

London air packages offering flight and hotel accommodation and usually tickets to a musical

Special interest holidays, e.g., gardens, golf, shooting holidays, language schools.

England/Scotland/Wales coach tours

Go-as-you-please programmes by car

Danish Tour Operators

There are a large number of tour operators spread all over Denmark, including large and medium-sized coach operators, who organize travel to Britain. In many cases the smaller operators arrange one or two round trips per year. Very willing to work with UK trade.

The biggest operators are DFDS, DSB rejsebureau, Gislev Rejser, Kuoni Travel, Profil Rejser. For contact details see the Denmark Travel Trade List.

In general the operators start planning their summer programmes in September, and the winter programmes in March.

Most of the operators have one or more British partners who assist them with their various products. Once they have established a good working relationship with a ground handler they normally hold on to that partner. Some experienced operators, however, prefer to deal direct with the suppliers, and have over the years, via visits to workshops in Britain and/or visit by British producers.

The bigger tour operators, like Profil Rejser, DSB tours, Kuoni Travel, sell their products via a large number of sales outlets all over the country. Many tourist offices also act as sales agents for the tour operators.

11) The Trade continued

Coach tour operators

The coach travel market is dominated by a few large operators. In addition, there are numerous small, often family-run operators. Holidays by coach remain popular as many special interest tours or round trips primarily use coach transport. Often these use flight transport to Britain and hired coach transport within Britain.

Danish Travel Agencies

General travel agents sell the products of the large tour operators. They are in high street locations and deal in all kinds of travel, including business travel. Many tourist offices also act as sales outlets for the products of the large operators, e.g. DSB travel agencies, Kuoni Travel, Profil Rejser.

Reaching the Danish Travel Trade

Trade Fair

FERIE and FERIE FOR ALLE are visited by both trade and consumers. See earlier descriptions.

Sales Calls – Top Tips

Speak to VisitBritain in London before your visit for the latest information on the Nordic region.

VisitBritain has offices in Copenhagen, Oslo and Stockholm (which also takes care of Finland).

Include VisitBritain's Nordic offices on your next sales visit or at least let them know you are coming.

Cold calling is not advised, so before arriving you must make appointments with the people you want to meet. VisitBritain cannot make appointments for you, but we can provide a list of trade contacts and give you advice on whom to call. However, please give advance warning. Make appointments one to two weeks in advance and reconfirm them a few days before.

The most important thing to remember is whether your product is going to be easy to sell and administer. The trade looks for volume and easy-to-sell products, hence the computerisation of the industry. Commission varies but is normally 7%-10%.

Send your brochure or mail a link to your website in advance. That way you will give the recipient time to digest the contents.

The typical working day in the travel trade is approximately 0830 to 1700 with a lunch break of between 30 minutes to an hour. Long, liquid lunches are not the style.

In the summer, from mid-June to August, many people will be away on holiday, and others may leave the office as early as 1500. Also try to avoid arranging appointments on Friday afternoons.

Easter is a major holiday-taking time. Visits in the spring should also be carefully planned, as there are several public holidays in these months (see Public holidays below).

Sales calls are necessary, particularly for hotels and handling agents who wish to make a mark, at least once a year and preferably twice if you are serious about the market. Once you make an appointment, try and stick to it and do not be late. Punctuality is expected.

Always respond to e-mails and faxes within 24 hours, even if it is just an acknowledgement (a quicker response is often expected to an e-mail).

Meetings should be used effectively. It is considered impolite not to be prepared. Try and use the first part of the meeting to find out as much as possible about your client's needs and those of their customers. Remember, listening can be as effective as talking.

Finally, follow up! Easily and all-too-often forgotten. After your visit, renew contact with both those you did see and those you were unable to see. And please keep VisitBritain informed of the results of your visit – both good and bad.

Public Holidays in 2006

- Jan 1 2006
- New Year's Day.
- Apr 13 Maundy Thursday.
- Apr 14 Good Friday.
- Apr 17 Easter Monday.
- May 12 Common Prayer Day.
- May 25 Ascension.
- Jun 5 Whit Monday; Constitution Day.
- Dec 24-26 Christmas.
- Dec 31 New Year's Eve



12) Business Visits / Events

Business Visits Statistics

1/3 of travel from Denmark to the UK is for business purposes, and this accounted for 44% of spend (IPS) in 2004.

Danish Business visits are made up of 27% Conferences, Large Meetings, Trade Fairs or Exhibitions and 73% individual business travel.

Source: IPS

Business Visitors Denmark	Visits2004	% Business Visits	Spend 2004	% Business Spend
	(000)	%	£m	%
Trade Fair/ Exhibition	9	5.3	8	9.5
Conference/ Large Meeting	37	21.5	15	18.0
Other Business	128	73.2	60	72.5
Business Visitors Denmark	AEV	AED	AELS	
	£	£	Days	
Trade Fair/ Exhibition	848	205	4.1	
Conference/ Large Meeting	395	155	2.5	
Other Business	467	151	3.1	

Business Visits Trends (Nordic region as a whole)

The most important factors Nordic buyers take into account when choosing a destination are quality of accommodation, total cost, easy access, safety and attraction / excitement of the venue.

The Nordic manufacturing and consulting sectors in particular arrange events overseas and these are mainly training, meetings and incentives.

There are two broad types of Nordic meetings and incentive buyers;

The Affluent Buyer

Always uses an intermediary agent (independent consultants, travel agents and meeting bookers). Budgets per delegate range from an absolute minimum of £390. The average is currently between £615 and £925. More exclusive groups generally have budgets of between £1385 and £1540 per delegate. This type of buyer needs to be inspired to choose Britain against our direct competitors (Spain, France, Italy, Germany and long haul).

The 'DIY' Buyer

Prepared to put together their own conferences or events and are nearly always on a very restricted budget. They will use budget airlines and accept three star accommodation. Intermediaries are often by-passed as they feel they can get the best deals direct or on the Internet. Information gathering is done via the internet and through frequent calls to VisitBritain. This type of buyer rarely has a budget over £460 per delegate.

For this type of buyer, Britain is in competition with the domestic Nordic market, other Nordic / Baltic destinations and Eastern Europe.

One thing the above have in common is that they both crave value for money. In Nordic countries, overseas group travel includes both conferences and incentives. However, incentive participants are subject to heavy taxation so trips are often disguised as a conference or have some token meeting element within the incentive.

Nordic people view the experience as very important. They want to engage in a wide range of activities and the level of accommodation is often sacrificed for this. Activity conferences or incentives, where participants must be involved in physical adventure activities, are very popular in Nordic countries especially for groups aged under 40. Experiences and a positive atmosphere are very important as a break from the routine environment. This aspect is likely to become even more essential as desk bound IT jobs increase. One thing for certain is that all content needs to be clearly specified in proposals.

A strong rationale is always required for the meeting to take place. Companies are becoming more aware that travel generally and particularly meetings and incentives should be effective and worthwhile and are therefore trying to cut out meetings which do not communicate the right message. Conferences are therefore being organised more professionally according to set objectives and are often evaluated following the event.

13) VisitBritain in Denmark

Working in partnership with VisitBritain

There are many ways of working in partnership with VisitBritain in any of our 37 global markets. We deliver numerous marketing campaigns and produce various targeted guides and publications which are seen by millions of potential visitors throughout the world - offering excellent advertising and partnership opportunities.

We undertake both print and online advertising, and produce e-newsletters communicating with both consumers (via our substantial databases) and our trade partners on-territory whilst the exhibitions, workshops, sales missions and media events we organise provide the perfect platform to promote your product firsthand to trade, press and consumer visitors.

In some markets where the travel trade remains a crucial element of the booking process we produce Agents' Sales Guides and offer Agents' on-line training programmes to ensure both the destination and range of British tourism product is at the forefront of the travel agent's mind.

For more details on these and other diverse opportunities in markets of interest to you, please visit our UK Industry Website and read our worldwide marketing prospectus, or contact your VisitBritain representative in London or overseas.

www.visitbritain.com/ukindustry

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Further information

Danish Statistical Office: www.dst.dk (also version in English)

British Council in Denmark: www.britishcouncil.org/denmark

British Embassy in Denmark: www.britishembassy.dk

London Contacts/Further information

For any further information relating to Denmark market, please contact the London-based International Markets Team:

www.tourismtrade.org.uk/visitbritaincontacts/overseasmarkets.asp

Alternatively, visit VisitBritain's dedicated website for the UK tourism industry: www.visitbritain.com/ukindustry

Why not sign up to our Industry E-Newsletter, or register with VisitBritain to be kept up to date with all that's new in Denmark and other markets worldwide?

Information Sources used to compile this report

International Passenger Survey figures (IPS) 2004 (Office for National Statistics)

NB: Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here.

- Anholt-GMI Nation Brands Index – Waves 2 & 3 2005 (Quantitative)
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- BBC websites
- Global Tourism Navigator
- FCO (Foreign & Commonwealth Office)
- ETC (European Travel Commission) and ETC New Media Review
- VisitBritain Denmark Business Plans, Insights and Intelligence Reports 2005



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