

Insight Report

Danish fashion in Germany



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Survey and data
Epinion

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Executive summary

Germany has the largest economy in Europe and the 4th largest by nominal GDP globally. Within Germany, the apparel sector amounts to €62.69bn in 2021, a figure expected to grow by 2.46% annually, and the country's import of clothing and textiles amounted to almost €50.11bn euros in 2020.

Despite the country's size, disposable income and geographical proximity to Denmark, it continues to be a market that many Danish brands struggle to crack. There are many challenges facing any Danish brand looking to enter the German market, but there are opportunities too.

This report provides industry insight and data – gleaned from a survey conducted by Epinion for Creative Denmark – relating to the perception of Denmark as a fashion producer in Germany. The findings, presented under three main headings – awareness and attribution, sustainability and digitalization – identify challenges and business opportunities for a variety of businesses.

Awareness and Attribution

The first section of this report looks at the high unaided awareness of Danish fashion in Germany and the associated attributes. The figures are impressive considering Denmark's small size, but the data also reveals which regions could benefit from strategic targeting.

Within this awareness there is a recognition of Denmark's strengths, with German decision makers rating Denmark highly for sustainability, design and quality. Looking at the data, Denmark has also been recognised as a nation with values that are considered of great importance in Germany. This presents a unique opportunity for Danish brands to build trust and sales.

Sustainability

Internationally, Denmark is seen as a leader in sustainability – a soft power that has been a competitive advantage for Danish brands exporting internationally.

In the second section of this report, this association is explored alongside consumer attitudes to sustainable fashion and cost in Germany.

Overall, the data reflects a global trend towards sustainability becoming a hygiene factor for buyers and consumers alike. Despite this edge dulling, further insight shows that there are still opportunities for Danish brand's to ensure their sustainability efforts remain a competitive advantage.

Digitalization

Despite its modernity and economic success, Germany is slow to digitalize. Looking at the data collected in this survey indicates a split between those that wish to digitize and those that don't. This lack of uniformity can create challenges for Danish brands used to working with digital tools looking to enter this market.

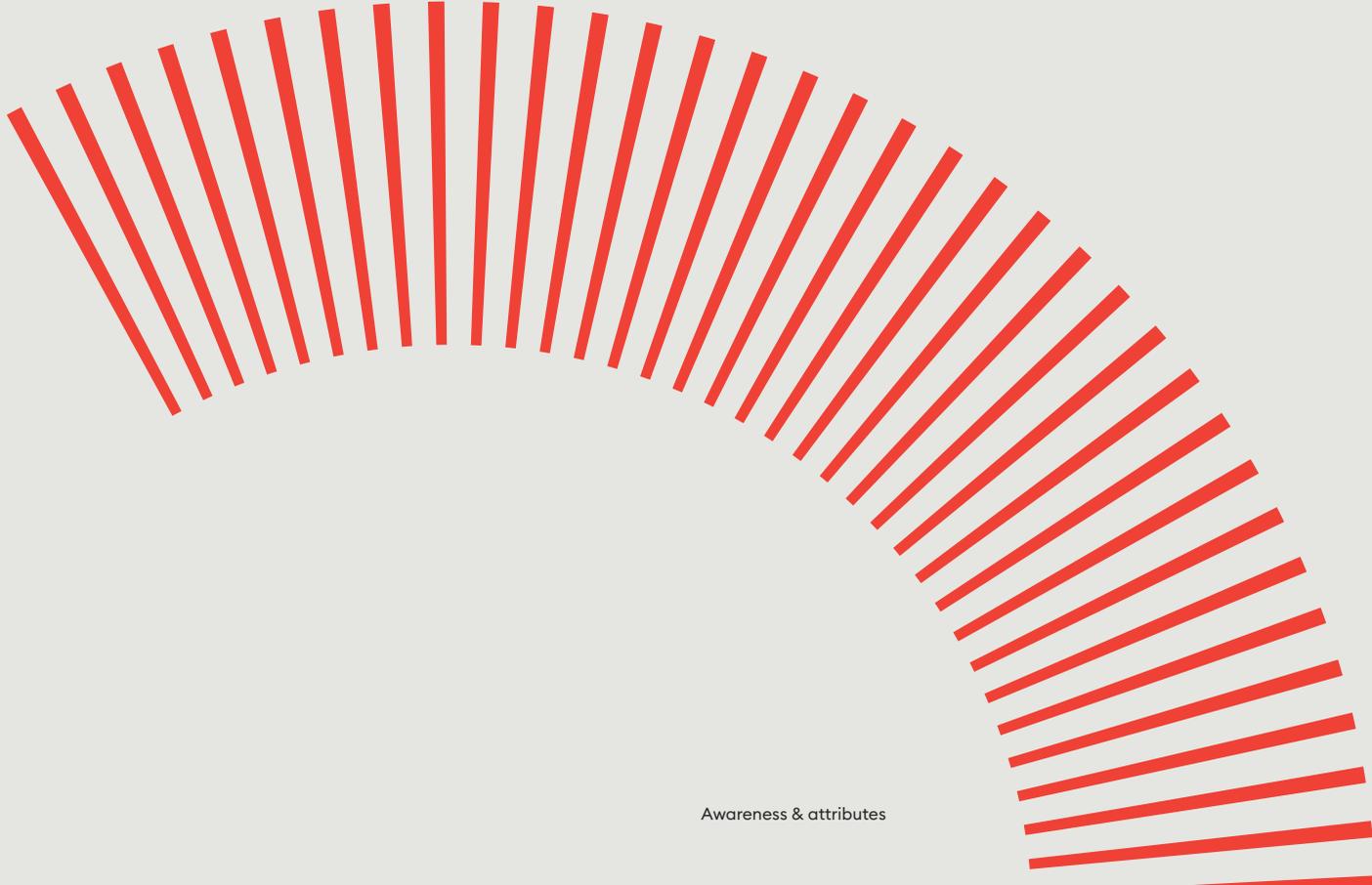
Regardless of the current demand, there is a need for Danish brands to stay ahead of the curve. The final part of this report provides insight into current business opportunities and how digitalizing can future proof.

Photo credit: Styledumonde Street Style Fashion



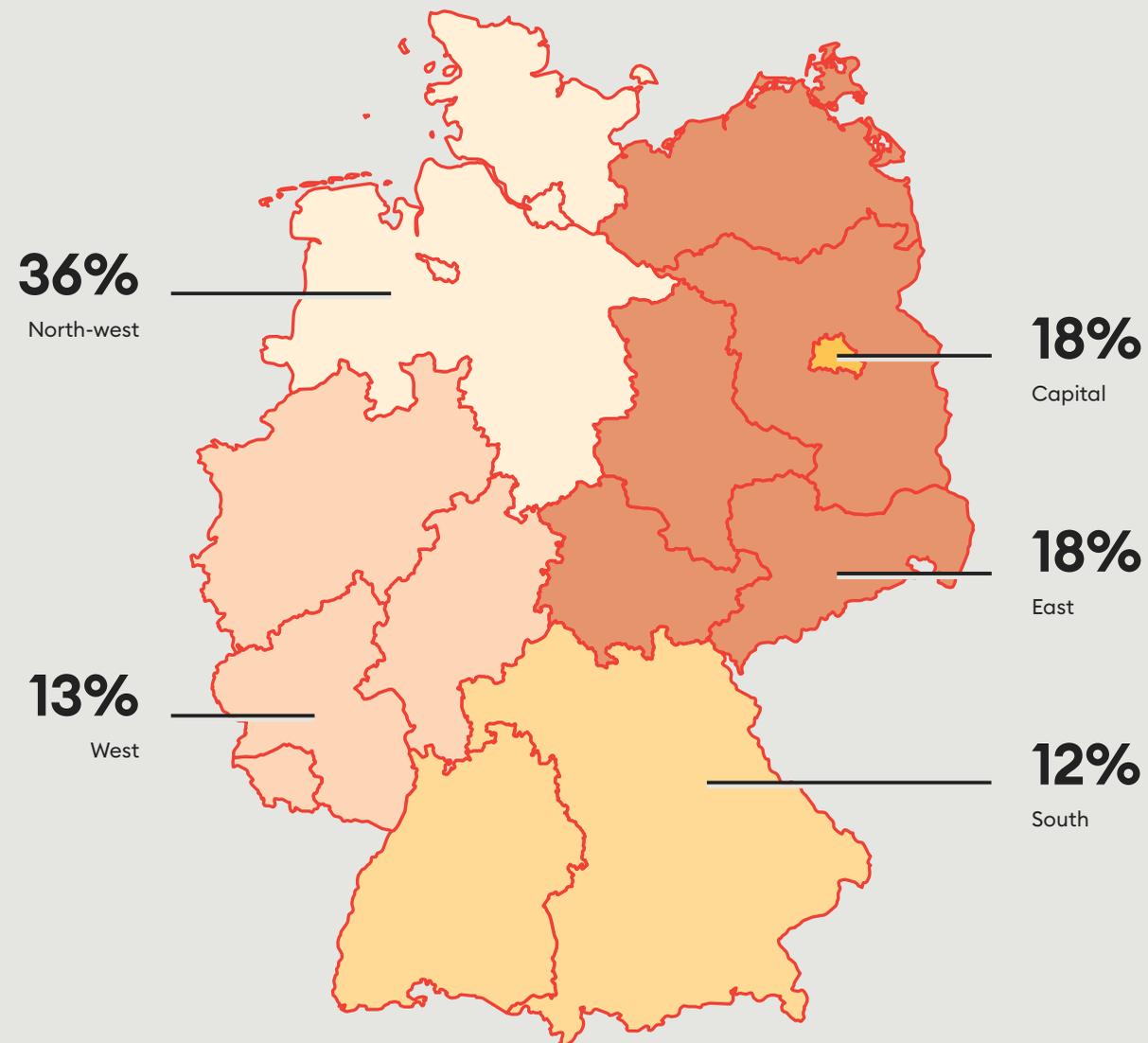
Awareness & attributes

A strong foundation built on trust and responsibility.



19%

unaided awareness in Germany for Denmark as a fashion and apparel nation.



“ Danish fashion is always very ahead of trends, they are very forward-looking. That combination of simple and brave: Germans are really inspired by the Scandinavian trendsetters.

Vanessa Peters
former Team Lead & Senior Buyer, Zalando

Little Scandinavia around the world

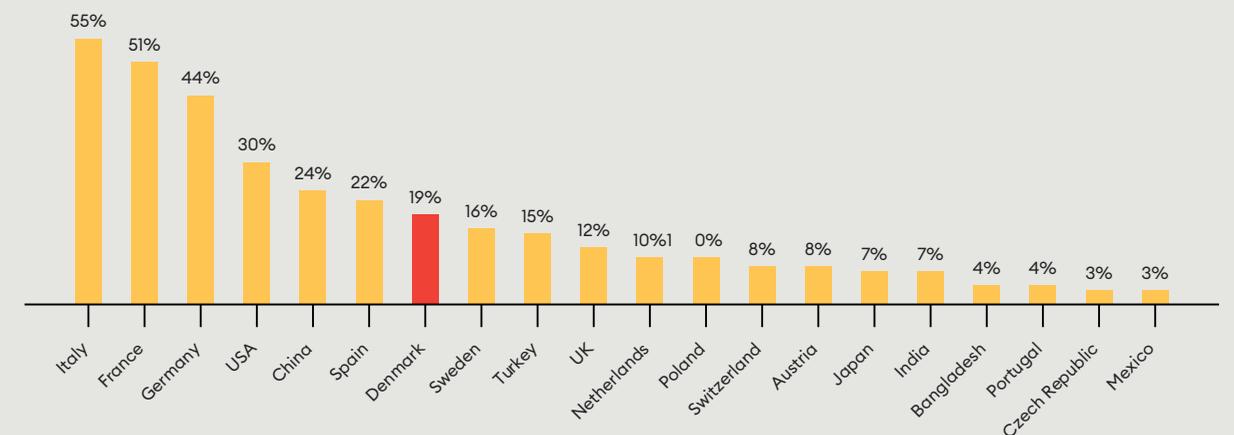
“The Scandinavian lifestyle is very popular among German consumers – they aspire to the Danish lifestyle.” Vanessa Peters, former Team Lead & Senior Buyer, Zalando

Germany already has a great understanding of Denmark as a fashion and apparel nation. A close look at the figures shows that this has translated into an national average of unaided awareness of 19%, with regional variations showing the expected results inline with geographical proximity. This is a strong performance considering Denmark’s small size.

But beyond this awareness is a desire to emulate. According to Peters: “Germans have the impression that Danish women just get up in the morning, pull something out of their wardrobe and always look fantastic. We want to be like the Danes: look cool, be relaxed and live the good life.”

The figures and insight reveal a strong association between Scandinavian fashion and lifestyle with Denmark, plus a German desire to access it.

Overall awareness



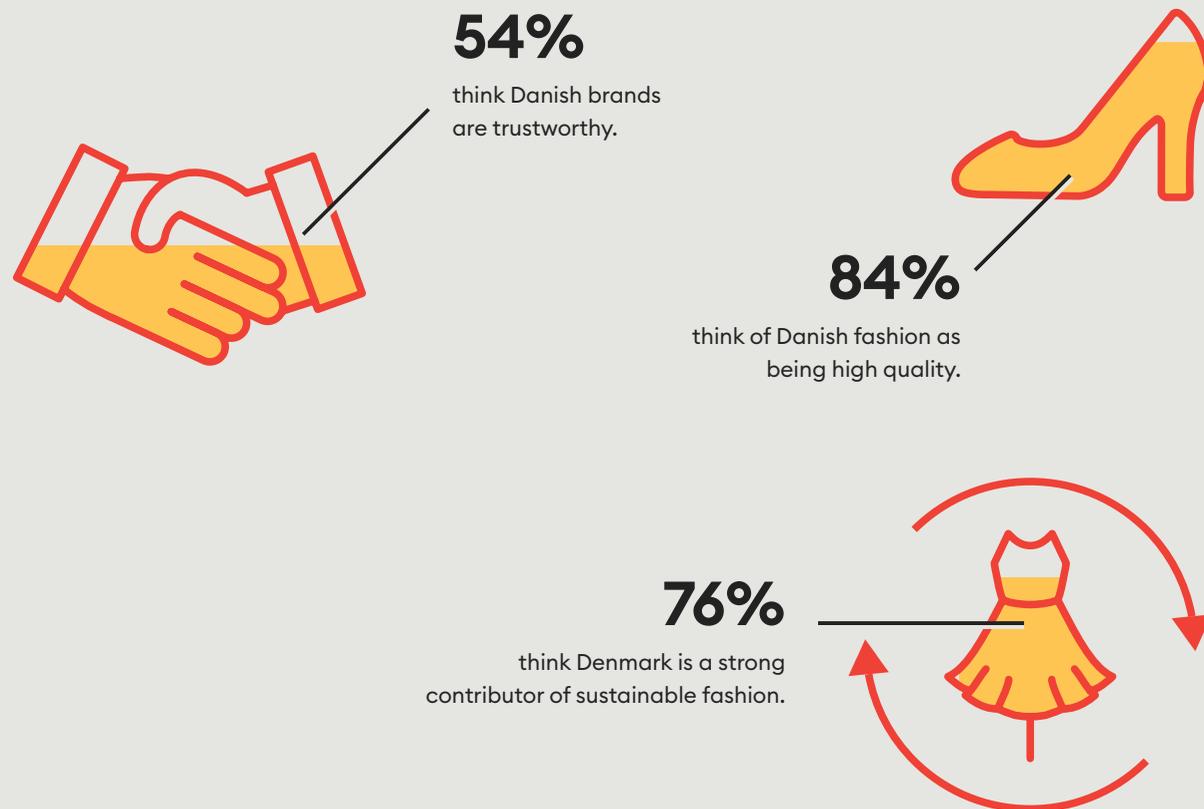
Positive associations for Danish conventions

Within this awareness, Danish fashion and apparel products are associated with many positive attributes: quality, good design, value for money, sustainability and functionality to name a few.

This also extends to the perception of the brands behind these products, with Danish companies being associated with attributes such as trustworthiness, reliability and creativity.

Of the participants that responded, 84% think of Danish fashion as being high quality and 68% think Danish fashion is good value for money. This is a particularly encouraging statistic for a price-driven market like Germany, demonstrating a previously disbelieved tendency towards quality over cost. Alongside this, 65% of respondents feel that Danish brands are reliable to work with and 54% believe Danish brands are trustworthy, indicating a clear association between Denmark and trust – a quality crucial for the German market and the most commonly associated among German decision makers when considering Denmark.

Combined, these associations form a strong belief in Danish fashion and brands from which to start building.



“Trustworthiness is a key thing for trading with German companies. If you do not live up to your agreements, they will stop trading with you. They might not even complain, they just will not make an order for the next season.”

Nikolai Klausen

Executive Director, WEAR

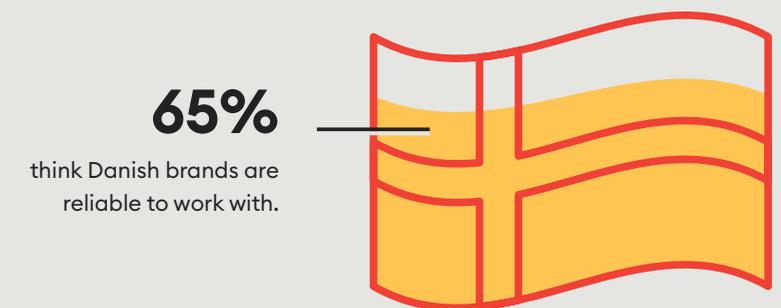
The importance of promises kept

The perception of Denmark in Germany is one of trust: more than half of respondents agreed that Denmark was reliable and trustworthy. Vanessa Peters, former Team Lead & Senior Buyer, Zalando, notes that “Danes are very trustworthy. You can always trust that promises and agreements will be kept.”

This is important, as trust is a crucial element for building relationships with German decision makers.

The value of trust to a German buyer cannot be understated. According to Michael Hillmose, Head of International Affairs, Danish Fashion & Textile: “Germans are like Danes – a deal is a deal and promises must be kept.”

Looking at the data and insight from industry leaders demonstrates that Denmark has great potential if it can build on the association of trust and continue living up to its reputation. German decision-makers will be more likely to take on a new client that comes from a nation widely known for its ability to deliver. This is especially important when moving into new regions, where Denmark’s trust and reliability will be a competitive advantage compared to other countries’ reputations.



Opportunity for growth

Although the data shows a lot of positive attribution and an impressive unaided awareness for Denmark's size, it also highlights areas that have great potential. Awareness is greatest in North-West Germany, followed by the East and capital region, where Berlin has an 18% awareness of Denmark as a leading apparel nation.

It is no surprise that North-West Germany has the highest awareness, given its border with Denmark and therefore its proximity to the country, but the figure for Berlin suggests there is plenty of room for growth. Within the capital there is a greater awareness of design and creativity in general and, although it is not the wealthiest region, there is a demographic willing to spend more on design and fashion. Berlin then demonstrates huge potential for entry to the German market, where the association of Denmark is positive, the market is unsaturated and the demographic has a tendency towards design.

The rest of the country has potential for growth too, though may not be as successful as an entry point to the market. In Southern Germany the figures show a 12% awareness, presenting huge room for improvement. In Germany, the overall perception of Danish fashion is centred around minimalism and simplicity. In the south, however, there is a higher awareness of southern European fashion and a taste level that is influenced heavily by this: bold and bright design does best.

“You need to build up your range and make adjustments for it to fit the regions. It is important to analyze your product before you go to make sure it really fits.” – Claus Tygesen, Business Manager Germany, Woden.

Through Denmark's position as a trustworthy partner, there is an opportunity to influence these markets by closing the gap between the awareness of what the design is and what Danish fashion and apparel brands can actually produce. According to Nikolai Klausen, Executive Director, WEAR: “There is a story that needs to be told in a different way: we are not adapting our design to what people want, we are trying to influence people to wear what we design.”

In fact, adapting design is likely to have little impact. As Thomas Hertz, CEO, Stine Goya, notes: “Design is not the main thing, it is about how you work with the distribution in the country.”

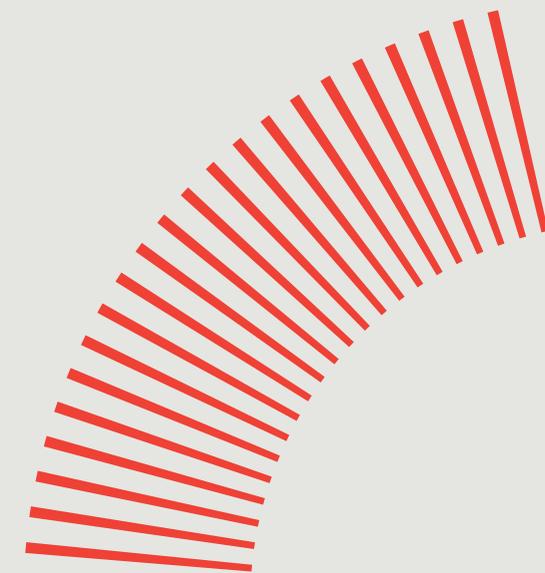
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You need to build up your range and make adjustments for it to fit the regions. It is important to analyze your product before you go to make sure it really fits.

Claus Tygesen
Business Manager Germany, Woden

Action points

- Despite differing tastes, storytelling around Scandinavian lifestyle is an asset throughout the country.
- Treat each region as a separate market and do your homework; what works in the north might not work in the south.
- Connections to each region through feet on the ground is vital. Invest in local distribution; a sales rep with knowledge of Hamburg cannot also service the capital region.
- Trust in Denmark is a competitive advantage: always deliver and keep promises.
- **3 out of 4 agree that Denmark delivers quality products, is a leading fashion nation and is a strong contributor to sustainable fashion**





Case study

Woden Building the Danish way with German tools

Woden is a Scandinavian footwear brand with an emphasis on sustainability. Based in Denmark and rooted deeply in Scandinavian design principles, the brand has benefitted from Germany's positive perception of the associated attributes.

As Claus Tygesen, Business Manager Germany, Woden, explains: "Woden has kept its Danish touch and image. There are positive associations of design and sustainability, and Denmark is seen as ahead in terms of those things. It is seen as very positive in the German market."

Woden has also worked with a strategic knowledge of Germany to ensure success in the market. This has been achieved through two major steps. The first has been the establishment of a 'back office' in Germany. Here, German-speaking employees with expertise of the market can handle all business activities relating to the country.

The second has been developing a full package of marketing and sales materials that are inline with the country's standards. Alongside the shoe concept and a curated collection, Woden delivers German-language print and digital marketing materials, plus adapted T&Cs and payment conditions that work for Germany, like free shipping. This makes it as easy as possible for the brand's German partners to do business in the German way.

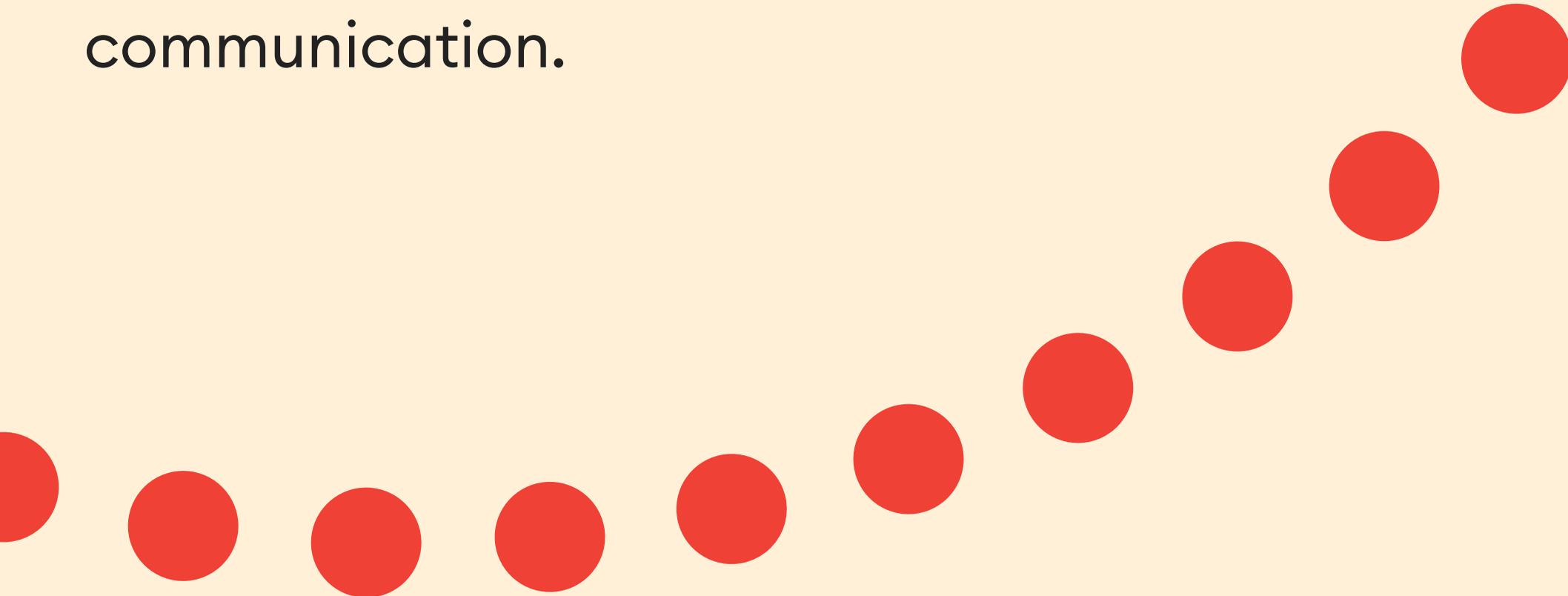
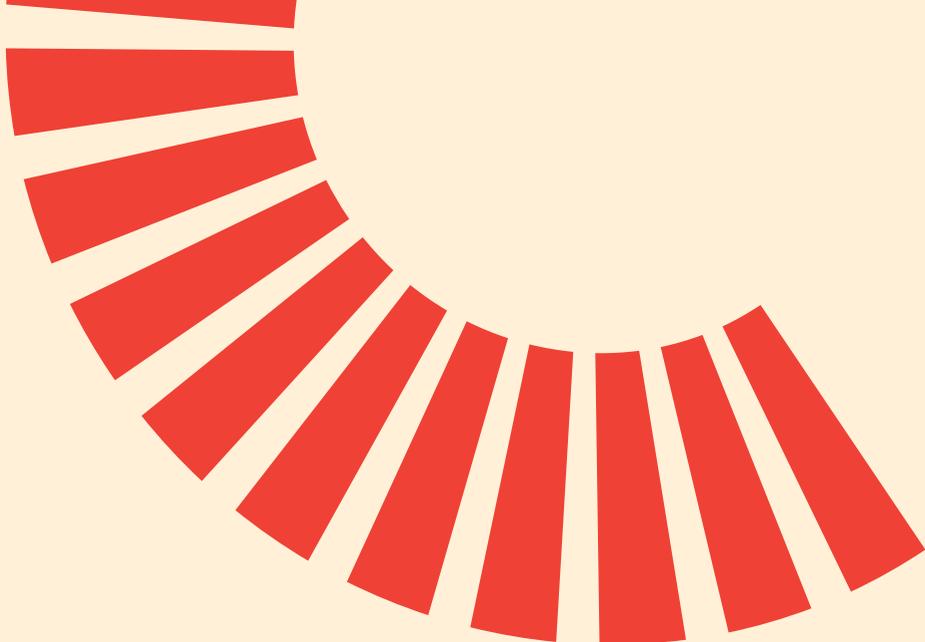
By blending positive associations of the Danish design and apparel industry with a demonstrative commitment to German business methods, Woden has built strong relationships with its German partners which support growth.



Photo credit: Styledumonde Street Style Fashion

Sustainability

Focus on supply-chain, documentation and communication.



51%

associate sustainability with factors tied to supply chains.

Denmark as a leader in sustainable fashion

Denmark is often viewed as a leader of sustainable design and fashion, and in Germany, this perception is just as solid: 76% of decision-makers surveyed think Denmark is a strong contributor of sustainable fashion.

“The Danes started to focus on sustainability very early and it is just getting stronger. Many collections are now really defined by sustainable principles.” – Vanessa Peters, former Team Lead & Senior Buyer, Zalando

The strong association between Denmark and sustainability will only continue to be an asset as more companies and consumers wake up to the reality of the climate crisis. This understanding is already very high in Germany, where 88% think sustainability is an increasingly important trade parameter.

However, sustainability is a hygiene factor and is rapidly becoming the default. While many Danish brands are starting from a place of huge sustainable efforts, as consumer demand increases, this will cease to be a competitive advantage. It is no longer a question of if sustainability is relevant to the German market, but how to take it to the next level. Looking at the data and industry insight, communication will be an important factor in securing an edge for Danish brands.

“ Woden has kept its Danish touch and image. There are positive associations of design and sustainability, and Denmark is seen as ahead in terms of those things. It is seen as very positive in the German market.

Claus Tygesen

Business Manager Germany, Woden

Communicating sustainability and benefits

When looking at the figures, the majority considered sustainability in terms of value chains: 13% associated it with being environmentally conscious, 13% associated it with responsible sourcing, 8% associated it with energy efficiency, and 17% associated it with organic materials and short transport paths. This narrow focus on the value chain speaks to a wider narrative around sustainability that has focused on CO₂ reduction, which is ultimately easier to communicate to consumers.

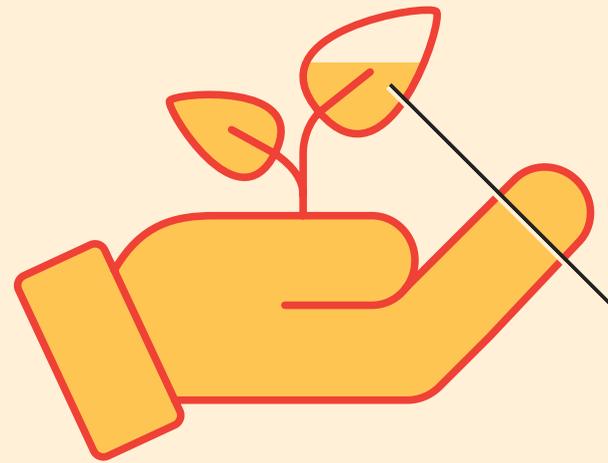
As a result, and due to individual sustainability goals, a brand's work with sustainability can directly impact its desirability to retailers. “At Zalando, there are certain budget margins that have to be met,” explains Vanessa Peters, former Team Lead & Senior Buyer, Zalando. “A minimum of 40% of the collection has to be sustainable, for example.”

Sustainability is rapidly becoming an expected requirement for buyers and consumers, and the ability to clearly communicate and document any sustainability efforts will be a key driver in continued sales.

88%

think sustainability is an increasingly important trade parameter





88%

think a documented high-level of sustainability increases the value of the product



88%

think investment in sustainability is necessary to secure long-term growth.

The cost of sustainability

The German market is historically price-conscious, and this presents a challenge when approaching the market with higher-priced, sustainable fashion.

“The German customer would prefer if everything was organic and produced in Europe, but still does not want to spend more than 19.99 EUR for a logo t-shirt.” – Vanessa Peters, former Team Lead & Senior Buyer, Zalando

Despite this cultural attitude, 68% think sustainability is more relevant than price, 88% believe a documented high level of sustainability increases the value of the product and 68% think Danish fashion is good value for money.

The data shown goes against a common assumption about the German consumer, demonstrates that consumer education is high and suggests a tendency towards more sustainable fashion – once consumer behaviour catches up. The German market is poised for meaningful change: Danish brands have an exciting opportunity to be there when it does.

Resale

The challenges around sustainability are mostly universal, but for the German market, Danish brands have the added benefit of a German association of quality. Resale is popular in Germany and this can be of use for Danish brands. By entering the market with products containing a perceived high quality, there is a possibility for these items to be resold, therefore mitigating some initial concerns about cost.

Certification as a communication tool

In an increasingly saturated market, where clear communication and perceived value of a product can be a deciding factor for a consumer, certification is an effective tool in capturing a greater market share. The demonstrative quality of certification can mitigate consumer concern about price or environmental impact, and the associated transparency benefits future resale.

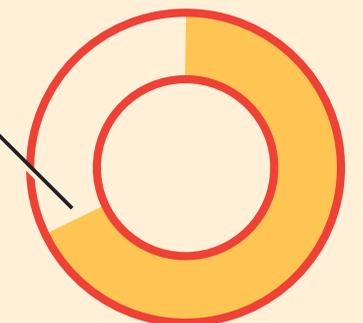
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The German customer would prefer if everything was organic and produced in Europe, but still does not want to spend more than 19.99 EUR for a logo t-shirt.

Vanessa Peters
former Team Lead & Senior Buyer, Zalando

68%

think sustainability is more relevant than price



Action points

- Denmark is a frontrunner in sustainability, making it aspirational to the German consumer.
 - Sustainability is rapidly becoming the default. A clear strategic focus and an investment in documentation and communication is necessary for Danish brands to maintain a competitive advantage.
 - High quality products with good traceability can mitigate price-conscious consumer behaviour in a changing market.
 - Data highlights a tendency towards quality over cost, indicating a shift in German consumer behaviour that Danish brands can capture.
- **Sustainability is primarily associated with environmental consciousness, responsible sourcing, energy efficiency and recycling/re-use of materials.**



Case study

Part Two Prioritizing sustainability for success

In a cost-conscious market, where resale is popular and effective communication is key for standing out, on-product labelling is an effective tool.

This is why Part Two, a Danish fashion brand with showrooms in Germany, launched its We Care tag. Since 2019, the brand has increased its use of responsibly sourced and more sustainable materials, resulting in 73% of its 2021 collection being sourced with a smaller footprint. There are ambitions to continue the growth of responsible sourcing and hit the 100% target comfortably by 2025.

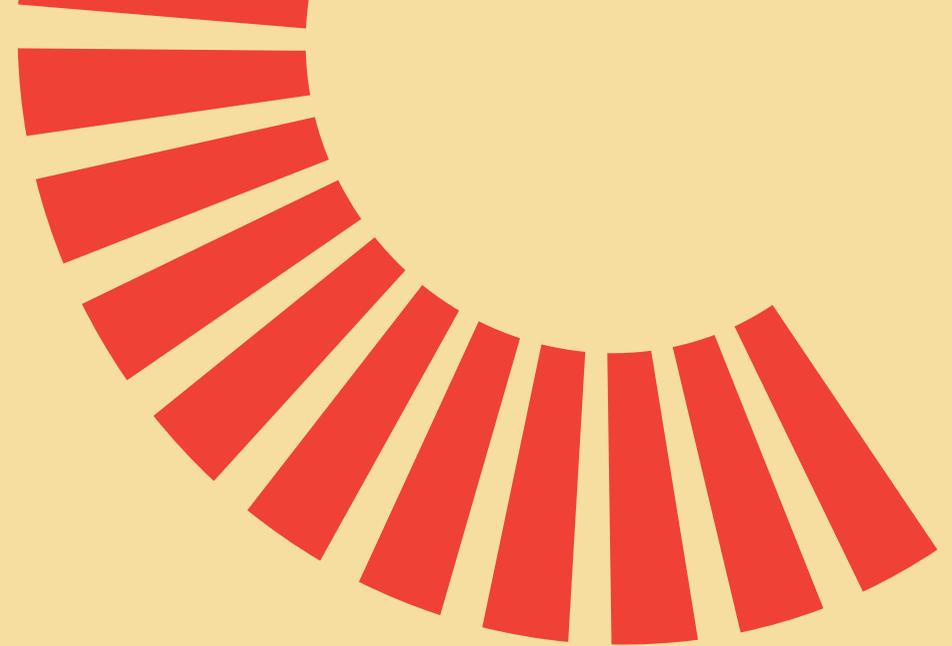
To communicate these efforts, Part Two has included its We Care tag on garments – a small logo that quickly indicates to consumers that the item is responsibly sourced. This is an effective tool for buyers, as it increases the product's value and can often offset consumer concerns about price. The tag is also linked to the Part Two website, where further information regarding the We Care initiative and the brand's value chain can be found.

This clear, concise communication is also beneficial when it comes to selling to the German market. As Thomas Juul, Brand Director, Part Two, notes: "Regarding the German model, they look into these things. We can really see that our customers look into it, and they use it [to sell to] the end consumer. There will be much more of this going forward, and eventually there will most likely be laws ensuring everyone works this way." By opting for transparency early on, Part Two's impact has increased on the German market and the brand has future-proofed itself.



Digitalization

Danish stronghold and tool
for securing relationships.



83%

have said that COVID-19 has accelerated their digitalization processes.

In Germany, there is a perception of Denmark as a bold trendsetter. It is not unfounded: alongside the country's pioneering sustainability work, Denmark is also a frontrunner in digitalization. Having comfortably embraced the digital landscape and optimised operations using it, there is a tendency to forget that not every country is at the same level. Despite Germany being one of the biggest industrial countries and consumer markets in Europe, it is still lagging behind Denmark on this factor.

But there is a desire to catch up and a few key players leading the charge. This can be seen in the figures, with 66% of German companies believing they will use data and AI in the future, and 83% agreeing that the pandemic has caused them to speed up their digitalization processes. It is also reflected in industry insight, as Peters notes the importance of data in buying decisions for Zalando: "The decisions are definitely driven by the numbers, we do not make decisions based on what we like the best."

“ The decisions are definitely driven by the numbers, we do not make decisions based on what we like the best.

Vanessa Peters
former Team Lead & Senior Buyer, Zalando



Photo credit: Tine Bek

Digitalization in securing and building relationships

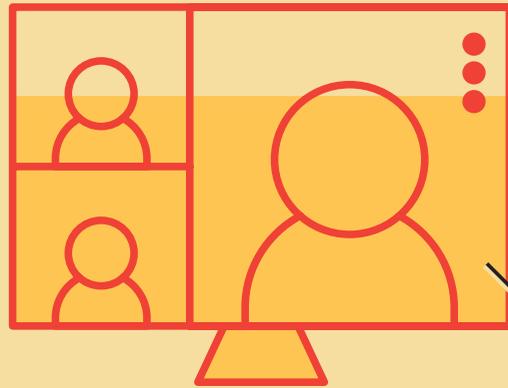
Post-pandemic, the way we work has changed. In Germany, this has resulted in the use of virtual and remote meetings continuing: 39% said this is the preferred channel for engaging with existing suppliers, compared with just 15% preferring in-person meetings. This marks a clear shift towards digital practices in maintaining existing business relations, though it is important to note that this is not yet the case for developing new relationships.

Alongside this, there is an increased tendency to utilize digital processes for aspects of the supply chain. “Germany has awakened in terms of digitalization. They have realized that it is possible to handle a lot of the order process through digital platforms and that it actually works. I think that we will see more of that in the future,” explains Vanessa Peters, former Team Lead & Senior Buyer, Zalando.

Social media as a digital tool

Due to Denmark’s digital advancement in comparison to Germany’s, it can be easy to overlook areas where an existing digital platform can be optimized. “I find many new brands through Instagram,” explains Vanessa Peters, former Team Lead & Senior Buyer, Zalando. “All buyers are getting a lot of their information from this channel. Especially smaller brands, they really become visible here.”

This is reflected in the data too, where blogs, social media and websites were the second most popular way of sourcing new products after trade shows and other events. This shows that a strong digital presence can help break the market, and gives brands with smaller budgets an opportunity to be seen.



76%

use online meetings as the preferred channel for engaging with existing suppliers, while in-person meetings are still preferred for engaging with new suppliers.



Some of the biggest online sales platforms have started in Germany. There has been a firm grasp on the transition from ordering by catalogue to digital platforms.

Jens Obel
CEO, DK Company

Polarization of Germany

The desire to digitalize in Germany is far from unanimous, as the data shows, and there are still areas where old is best. For any brands looking to enter the market, there is no digital tool that can replace a face-to-face meeting. “You need to meet people to establish a good connection. You can not matchmake on paper” – Michael Hillmose, Head of International Affairs, Danish Fashion & Textile.

Looking closer at the data and what this means for Danish fashion, the value of trade shows and other events is clearly highlighted, with 42% saying it is still their preferred channel for finding new products. This is echoed in industry insight, as Vanessa Peters, former Team Lead & Senior Buyer, Zalando explains: “Trade fairs are still the most important touchpoint to connect and get inspiration from the new collections.”

Despite these mixed results, digitalization is still a competitive edge for Danish companies. Jens Obel, CEO, DK Company, points out the growing popularity of digital companies like Zalando and Amazon: “Germany is where there have been some of the biggest online sales platforms. There has been a firm grasp on the transition from ordering by catalogue to digital platforms.” This shift towards digital-first is further evidenced in Son of a Tailor’s experience in Germany, which is the ecommerce company’s third largest market.

“ Even if the data shows that maybe 1/3 is not interested in digitalization, they will be in a year or two. If you are not there when they are, you are left behind.

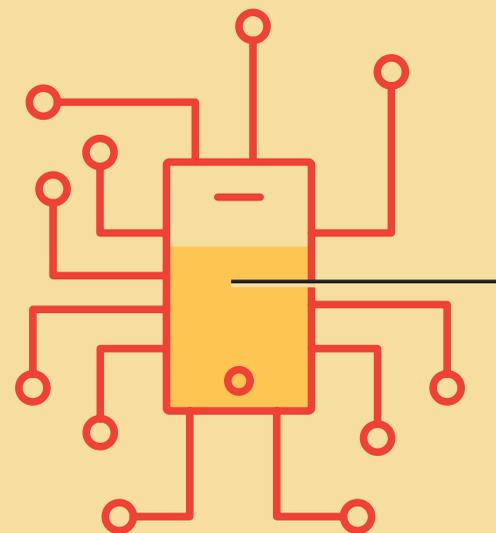
Nikolai Klausen
Executive Director, WEAR

This unsaturated market with an increasingly digital consumer provides an exciting opportunity for Danish brands looking to enter the German market, though it perhaps is not a long term solution for growth: “We have had an easy time finding our niche in Germany, but building broader recognition has proven relatively hard – and that is where you realise that it is indeed a big country.” – Jess Fleischer, founder and CEO, Son of a Tailor

Future proofing for a digital future

By working flexibly, Denmark is able to offer the German market the opportunity to work with a digital leader using hybrid models while they build a digital infrastructure.

And it will be built: it can be seen from the figures, industry insight and global trends that Germany will eventually catch up. What that means for Danish brands looking to work in Germany is that digitalization is an investment worth making now, even if German partners will not use it for a while. This is an opportunity to get ahead and lead Germany into a digital future.

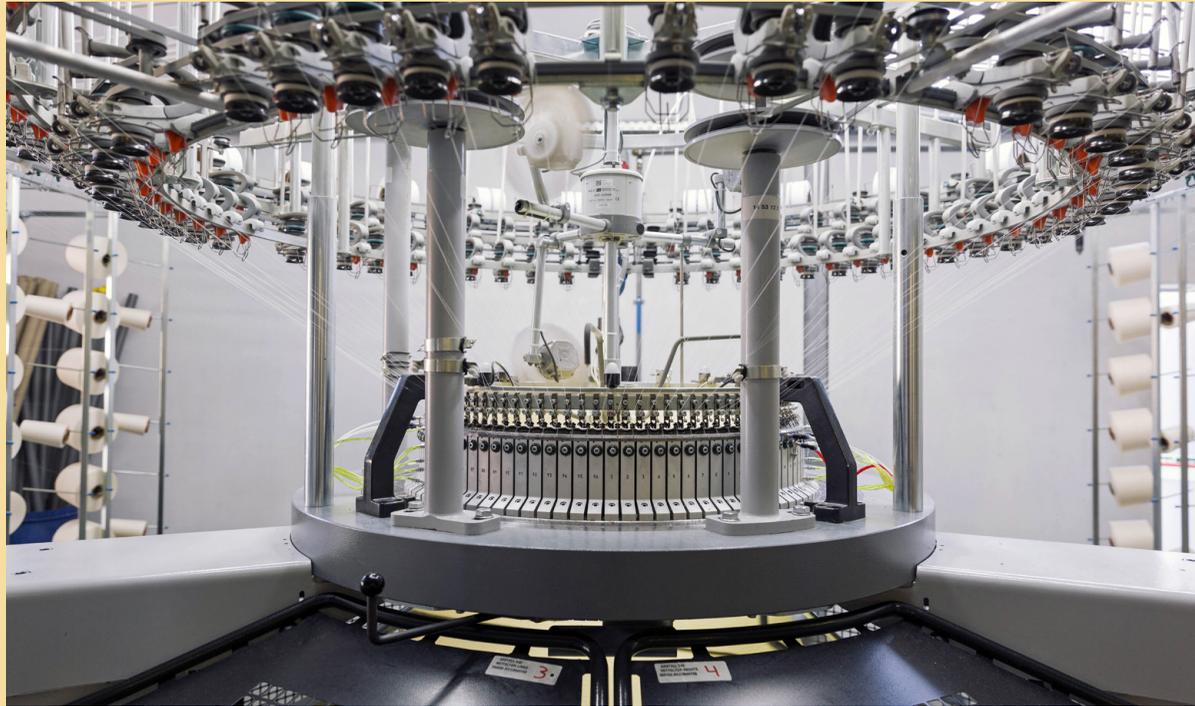


66%

believe they will use data and AI in the future.

Action points

- Investments in digitalization puts Danish brands ahead of the curve and makes them desirable to German brands looking to modernise/in the future.
- Digital and physical hybrid working is a good way to establish and maintain relationships.
- Physical presence at trade shows and fashion weeks is still crucial for capturing new business.
- The ecommerce sector is still fairly unsaturated and leaves little competition for a digital-first apparel brand looking to enter the German market.
- Correct pricing, including ensuring round numbers, is essential for success on large online platforms.



Case study

Son of a Tailor

Utilizing digitalization for growth ambition

Son of a Tailor is a custom-fit menswear brand that produces classic wardrobe staples without creating waste in the supply chain.

Since launching, the company has had one goal: to reengineer the fashion industry through a made-to-order model that is better for customers, garment workers and the planet. To achieve this, Son of a Tailor has needed to be scalable. Digital processes have been of the greatest importance, both in perfecting a zero-waste production by means of the brand's Perfect Fit algorithm and supporting the brand's quick growth.

Son of a Tailor is an international-first ecommerce company, launched with global shipping as default. As Jess Fleischer, Founder and CEO, Son of a Tailor, explains: "Denmark is a very small country so if you want to grow, you have to explore markets abroad quite early."

This exploration has led Son of a Tailor to Germany, where low barriers to export and an increasingly digitally literate customer base in an unsaturated market – Fleischer comments that it is a "market with lower online competition for customers" – have seen great success for the brand. Germany is now Son of a Tailor's third biggest market.



Case study

Minimum

How virtual reality can be used as an additional sales tool

Physical sales are crucial for markets like Germany – 42% of German decision makers have stated that trade shows are their preferred channel for buying, even after the pandemic. So when a crisis prevents traditional, face-to-face meetings, brands must rethink their operations.

Minimum responded to this challenge with a digital showroom, developed and finalized in March 2020. "When lockdown became a reality, our pace of ideation, decision making and implementation increased dramatically. Instead of being reactive, we chose to be proactive by speeding up our planned developments on digitalization – including our new B2B-platform with a digital showroom," says Casper Bech Olesen, International Sales Manager, Minimum.

Quickly after this launch, Minimum made virtual reality an option to their customers. With their pilot project – showcasing a capsule of sweat styles through an immersive experience with production footage,

personal design presentations and 360-degree fashion shows – Minimum demonstrated how augmented reality can be used as an extended arm and a powerful storytelling tool. Alongside experiencing the final styles, buyers can also understand the design process and Minimum's responsible production.

"Despite the advancement of virtual reality, one of our learnings has been that we still need a physical element, so we developed books with swatches to send out to buyers. With the option to touch and feel the quality of the digital styles, the book creates a link between in-showroom and virtual remote appointments," says Casper Bech Olesen, International Sales Manager, Minimum.

Overall, Minimum's experience with virtual reality has been positive. By breaking away from the static digital platforms that buyers have seen several times before, Minimum has been able to maintain and elevate their strong international foothold.



Key recommendations and opportunities

01 Extend awareness of Danish fashion to different regions

- Overall, Denmark has a **solid level of awareness** among fashion decision makers in Germany.
- While the awareness is high (especially in the northern German regions), there is room to grow in the rest of Germany – a necessary step to increase overall awareness in the German market.
- **Regional investment and adapting** to the German way of doing things – speaking German, keeping German service hours, providing free shipping – are necessary.

02 Leverage existing strongholds

- Good **design, quality and functionality** are strongly associated with Danish fashion products; and decision makers perceive Danish companies to be **creative**.
- **Trust is crucial** for business in Germany and currently a competitive advantage for Denmark. Danish fashion companies could benefit from further leveraging Denmark's position as a **producer of high-quality fashion products and a trustworthy and responsible business partner**.
- **Investment in digitalization** and **effective communication of sustainability efforts** will ensure a competitive advantage for Danish brands in the future.

03 Exploit positive associations of Denmark with sustainability

- German decision makers attribute sustainability an important role for growth, trade & product value. At the same time, the majority associate Danish fashion products with sustainability.
- Danish companies could benefit from **communicating** how they implement **environmental consciousness** and how they make decisions when sourcing products sustainably.
- The data shows a **tendency towards quality and sustainability over cost**, presenting Danish brands with an **exciting opportunity to convert consumers** as their behaviour changes.

04 Make use of increased digitalization focus after Covid-19

- The Covid-19 pandemic has **increased the digitalization focus** for most German decision makers.
- **Data and artificial intelligence** will gain importance for identifying new business opportunities.
- Danish companies can benefit from building a deeper understanding of German companies' digitalization strategies – and **how to help German customers succeed in the digital space**.

05 Engage digitally with existing customers

- In Germany, **different channels** are favored in different situations. **In-person meetings** are still the best way to establish first contact, while existing business relationships can be taken **online**.
- **Presence at trade fairs** is still important for discovering new trends and products.
- Danish companies should expect customer relationships to be increasingly shaped by **digital engagements**.

This image report was developed using data collected from a survey by Epinion for Creative Denmark. The survey covered the German market with the objective of covering different geographic regions. Interviews were therefore distributed over five customized regions, each covering different “Bundesländer” of Germany.

Responses were collected amongst 241 German decision makers from fashion companies in the five defined regions. The survey focused on the image of Danish fashion in Germany, with sections focusing on sustainability and digitalization.

The data was collected from 10th - 25th May 2021. At this time, the Covid-19 epidemic was an influence on trade flows, the image of fashion nations and potentially attitudes towards sustainability and digitalization.

About Creative Denmark

Creative Denmark is a not-for-profit, public-private partnership that creates awareness about Danish creative strongholds internationally. We foster relations between international stakeholders and Danish solutions, products, and competencies across the creative industries.

For more information visit creativedenmark.com

Founding partners

