

Denmark

Tourism in the economy

In 2015, spending by inbound tourists was DKK 38.9 billion, representing 3.5% of total Danish exports. The direct contribution of tourism to the Danish economy measured by gross value added was 1.7%. If derived effects are included, the contribution was 3.2% (DKK 56.6 billion).

Tourism spending generated 118 000 full time jobs, accounting for 4.2% of total employment.

Tourism bednights increased by 15% from 2008 to 2016. The highest growth rates have been in city tourism (85%) and business tourism (15%). Coastal and nature related tourism has also grown but at a more modest pace of 7%.

In 2016, there were 51.5 million bednights at hotels, holiday centres, hostels, camping sites, marinas and rented holiday houses (26.1 million international bednights). The top foreign origin markets were Germany, Norway, Sweden, Netherlands and the United Kingdom. Together they accounted for 82% of all international bednights in Denmark. Germany continues to be Denmark's primary foreign market with 57% of the international bednights. Denmark has experienced substantial growth from long haul markets such as China, the United States and India in recent years, but neighbouring European countries continue to be the mainstays of Danish tourism.

In 2015, coastal and nature related tourism generated 46% of total tourism revenue, while city tourism and business tourism generated 25% and 28%, respectively. Copenhagen accounts for 24% of the country's total tourism revenue, while the Capital Region accounts for 41%.

Tourism governance and funding

In January 2015, the Danish law on tourism came into force with the goal of achieving a greater impact from the investment made in the sector every year through better coordination at national, regional and local levels.

The Danish National Tourism Forum was established to lead and coordinate the public promotion of Danish tourism. Members of the Forum include: a chairman from the Ministry of Industry, Business and Financial Affairs, VisitDenmark's Chairman, two members from Danish regions, one member from Local Government Denmark, two members representing the tourism industry and a tourism researcher.

The National Tourism Forum has developed a national strategy for Danish tourism to 2025. Additionally, the Forum collects tourism data, undertakes an annual analysis of the development of Danish tourism and reports annually to the Minister.

The legislation also established the Danish Tourism Advisory Board to advise the National Tourism Forum. The Advisory Board comprises a chairman, 17 members and two observers, representing a wide range of stakeholders with tourism interests to ensure the provision of professional and competent advice.

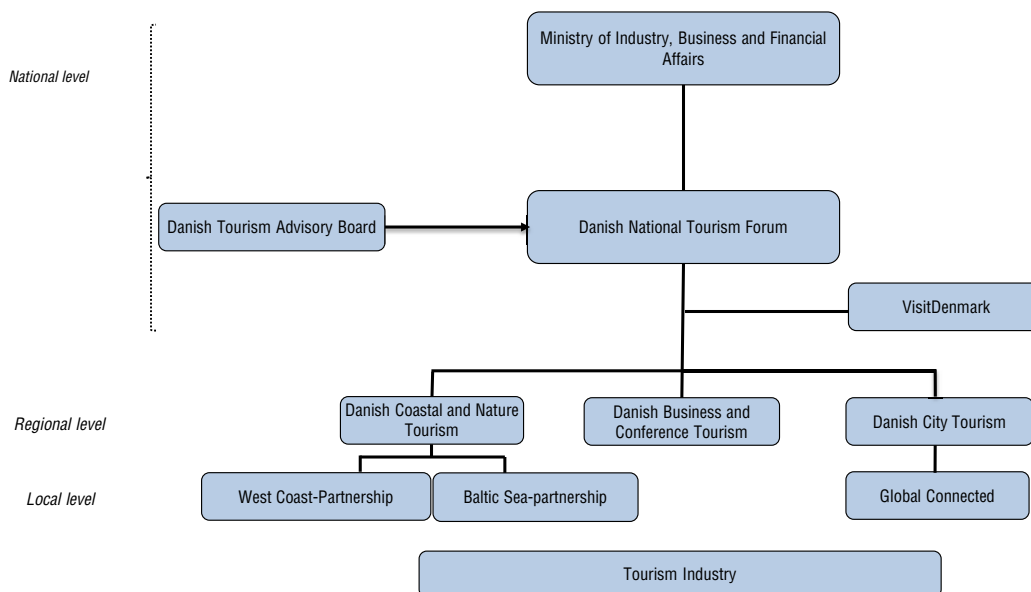
Under the legislation, three tourism development agencies have also been established: Danish Coastal and Nature Tourism, Danish Business and Conferencing Tourism and Danish City Tourism. Their responsibilities are to generate growth in their particular sector, based on their own strategies; under the umbrella of the national tourism strategy.

The international branding and marketing of Denmark is managed by VisitDenmark which is also responsible for market research and monitoring trends and activity in Danish tourism. VisitDenmark co-operates with the Ministry, the Danish National Tourism Forum and the regional tourism development agencies. The National Tourism Forum coordinates collaboration between the relevant tourism bodies.

The Ministry of Industry, Business and Financial Affairs and VisitDenmark co-operate with several other ministries e.g. the Ministry of Environment and Food, the Ministry of Transport, Building and Housing, the Ministry of Foreign Affairs and the Ministry of Culture – including the Danish Agency for Culture and Palaces.

Total public expenditure to enhance Danish tourism was DKK 664 million in 2015 coming from the state (17%), regions (21%) and local municipalities (62%).

Denmark: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Industry, Business and Financial Affairs, 2018.

Tourism policies and programmes

In order for Danish tourism to stay competitive and win market share in the international competition for tourists, efforts will be directed to address the following strategic challenges:

- Evolving visitor demand: Denmark must provide the accommodation and experiences necessary to meet increasingly diverse visitor expectations,

- Below average growth: During the period 2008-2015, Denmark's growth has been below the average in Northern Europe,
- Below average visitor satisfaction: Denmark scores lower than its neighbouring countries on a number of parameters, notably in terms of the relation between price and quality.

Examples of evolving visitor demand include the desire for authentic experiences, sporting and cultural events, and digital platforms. Tourism stakeholders must co-operate and take strategic action while focusing on the unique qualities and strengths of the Danish tourism product, including openness, a culture of confidence and an informal approach, as well as genuine and intimate experiences both in the larger cities and in Danish nature.

The common vision for Danish tourism is that: "Denmark strives to be an engaging tourist destination where we – together with our guests – create a variety of quality experiences – always with a human touch and never far away."

In September 2016, the government launched a new national strategy for Danish tourism with three overall targets to be achieved by 2025:

- Denmark should have one-third more tourists, corresponding to 17 million more bednights compared to 2015,
- Tourism spending should reach DKK 140 billion, corresponding to an increase of approximately DKK 45 billion compared to 2014,
- Foreign tourists should be at least as satisfied with their holiday in Denmark as the Northern European average.

The national strategy includes a number of initiatives intended to ensure development and growth in tourism throughout Denmark. The initiatives fall within five strategic key areas:

- More effective marketing aimed at the most important markets and target groups: Marketing efforts to be based on common stories, be coordinated and take account of digital developments.
- Improved accessibility, internet and signage.
- Better tourist experiences in Denmark: This requires development of strong destinations, higher quality and focus on, for example, outdoor tourism, cultural tourism, events and congresses.
- Increased tourism capacity: During the high season, demand for modern and attractive accommodation exceeds the capacity in certain parts of the country.
- International competitiveness: An appropriate framework is required if Denmark is to offer good value quality products including competitive energy taxes and up-to-date regulations which support innovation and are not unnecessarily burdensome.

Digitalisation of tourism marketing and management in Denmark

As an initiative under the national strategy for Danish tourism, VisitDenmark launched its Smart Tourism Strategy in 2017 to fight the competitive challenges and exploit the possibilities of digitalisation. The strategy seeks to contribute to the National Tourism Strategy through three concerted initiatives:

- Smart Marketing: Increase the demand for Denmark as a tourist destination by prioritising digital marketing – mobile and social-first.
- Smart Working: Digitalisation of Danish tourism's value-chains and increase coordination and co-operation between actors within Danish tourism accordingly.
- Smart Insights: Identify relevant data and data sources in a common knowledge-hub, sharing and exchanging knowledge with other actors inside and outside the tourism sector in order to optimise and promote innovation in the marketing, product development and sales process.

The strategy outlines the role of VisitDenmark and other partners in securing more effective co-operation.

Statistical profile

Table 1. Denmark: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	45 642 e	45 686 e	50 793 e	50 732 e	50 987 e
Overnight visitors (tourists)	9 863 e	9 907 e	14 620 e	14 954 e	15 208 e
Same-day visitors (excursionists)	35 779 e	35 779 e	35 779 e	35 779 e	35 779 e
Nights in all types of accommodation	62 139	62 417	64 138	64 138	..
Hotels and similar establishments	10 022	10 065	10 305	11 037	..
Specialised establishments	9 751	10 030	10 361	10 019	..
Other collective establishments	5 184	5 139	6 290	6 606	..
Private accommodation	37 183	37 183	37 183	37 183	..
Inbound tourism					
Total international arrivals	25 866 e	25 795 e	27 607 e	27 764 e	28 121 e
Overnight visitors (tourists)	8 526 e	8 455 e	10 267 e	10 424 e	10 781 e
Same-day visitors (excursionists)	17 340 e	17 340 e	17 340 e	17 340 e	17 340 e
Top markets					
Germany	2 156	2 065	2 687	2 821	3 048
Norway	1 479	1 481	1 786	1 801	1 767
Sweden	1 184	1 207	1 443	1 438	1 432
United Kingdom	650	667	744	787	822
United States	510	518	507	514	523
Nights in all types of accommodation	46 039	45 655	48 734	50 186	..
Hotels and similar establishments	7 011	7 142	7 757	7 934	..
Specialised establishments	..	..	..	..	..
Other collective establishments	12 953	12 315	14 599	15 692	..
Private accommodation	22 041	22 041	22 041	22 041	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	7 843	6 977	8 528	8 991	9 651
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
..
..
..
..
..
TOURISM RECEIPTS AND EXPENDITURE, MILLION DKK					
Inbound tourism					
Total international receipts	50 762	55 923	58 473	60 114	46 467 p
International travel receipts	37 894	40 160	42 800	44 970	46 467 p
International passenger transport receipts	12 869	15 763	15 673	15 144	..
Outbound tourism					
Total international expenditure	64 925	66 671	69 329	71 695	61 933 p
International travel expenditure	56 518	56 561	58 682	59 987	61 933 p
International passenger transport expenditure	8 407	10 111	10 647	11 708	..

.. Not available; e Estimated value; p Provisional data
Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933639873>


Table 2. **Denmark: Enterprises and employment in tourism**

	Number of establishments ¹	Number of persons employed				
	2015	2012	2013	2014	2015	2016
Total	..	..	..	..	..	..
Tourism industries	20 811	84 679	85 781	89 817	93 315	..
Accommodation services for visitors	..	..	..	..	..	..
Hotels and similar establishments	1 506	12 293	12 422	13 172	13 413	..
Food and beverage serving industry	12 211	37 923	39 068	41 771	44 668	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	566	4 637	4 514	4 477	4 483	..
Cultural industry	3 450	17 654	17 588	17 859	18 040	..
Sports and recreation industry	3 078	12 172	12 189	12 538	12 711	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933639892>Table 3. **Denmark: Internal tourism consumption**

Million DKK

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	58 628	38 862	97 490
Tourism characteristic products	34 193	16 836	51 029
Accommodation services for visitors	8 077	6 363	14 440
Food and beverage serving services	7 232	7 082	14 314
Passenger transport services	15 636	2 296	17 932
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services industry	2 066	766	2 832
Cultural services	..	..	..
Sports and recreation services	1 182	329	1 511
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	24 436	22 026	46 462
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products

.. Not available

Source: OECD Tourism Statistics (Database).

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