

Denmark

Tourism in the economy

Tourists spent a total of DKK 128.0 billion in Denmark in 2017, of which DKK 54.8 billion – or 43% of total tourism spend – came from inbound tourists, representing 4.6% of Danish exports. Including indirect effects, tourism GVA generated by tourist spending represented 4.2% of the Danish economy. Of this, the direct contribution of tourism to the economy amounted to 2.4% GVA. The effect on employment from tourist spending was 161 000 full-time jobs. In 2017 there were 257 000 jobs in tourism industries, equivalent to 8.8% of total employment in Denmark. Travel exports accounted for 11.6% of total service exports in 2018.

Total bed-nights grew by 3.0% between 2017 and 2018 with a total of 53.9 million tourist bed-nights in 2018. Bed-nights from inbound tourists grew by 3.4%, with inbound tourists accounting for 51% of total bed-nights.

Since 2017, expenditure by visitors in private sharing accommodation has been included in the Danish Tourism Satellite Account. Estimates show a significant increase in the private sharing accommodation economy in recent years, with bed-nights up 14% from 2017 to 2018. Inbound tourists accounted for 79% of these bed-nights in 2018, down from 82% in 2017.

According to accommodation statistics, the top three inbound markets in 2018 were Germany, Norway and Sweden. Together, these three markets accounted for 72% of all inbound bed-nights in Denmark, with Germany alone accounting for more than half (57%). The three main growth markets from 2017 to 2018 were Germany (contributing 58% of the growth in all inbound bed-nights), United States (9%) and France (5%).

Tourism governance and funding

Tourism policy falls under the direct responsibility of the Ministry of Industry, Business and Financial Affairs. The Ministry also co-operates with other ministries on issues related to tourism, including the Ministry of Environment and Food, Transport and Housing, Foreign Affairs, and Culture.

The role of the Danish National Tourism Forum is to lead and co-ordinate tourism policy, working in close collaboration with the Danish tourism industry. Established in 2015 and chaired by the State Secretary of the Ministry of Industry, Business and Financial Affairs, the Forum is also responsible for drafting national tourism strategies and reporting on the state of tourism nationally.

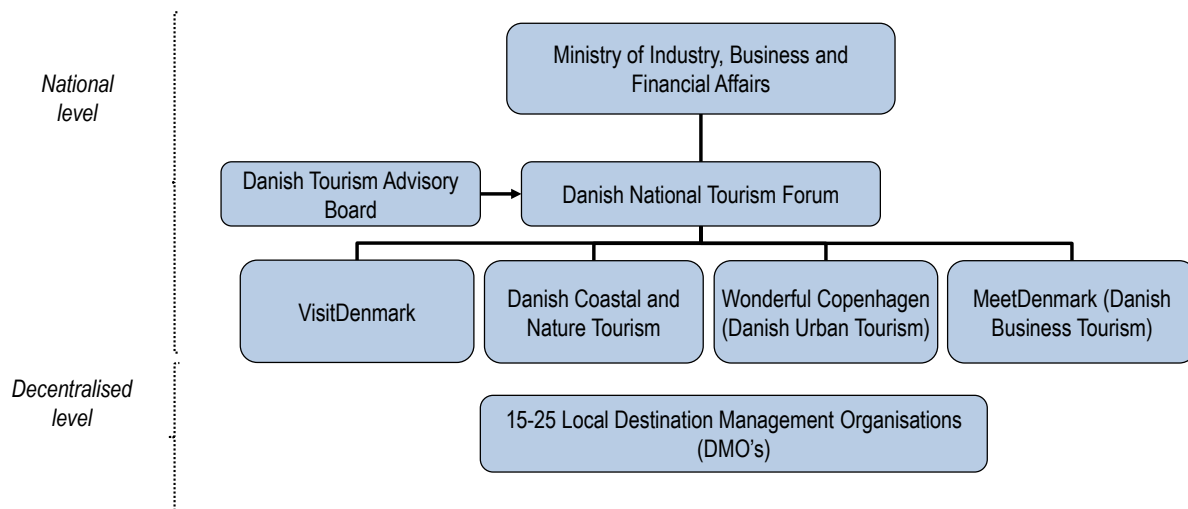
The Danish Tourism Advisory Board advises the Danish National Tourism Forum on current and future opportunities and challenges, and brings together a broad selection of tourism stakeholders from public, private and civil society.

The international branding and marketing of Denmark is managed by VisitDenmark, which is also responsible for market research and monitoring trends and activity. Three national tourism development organisations complete the national tourism administration structures: Danish Coastal and Nature Tourism,

Danish Business and Conferencing Tourism, and Wonderful Copenhagen, which includes Danish City Tourism. These agencies are responsible for developing their respective business areas through strategic development plans aligned with the existing national tourism strategy.

A decentralised network of destination management organisations develop, co-ordinate and operate strategic local business support activities. In 2018-2019, an important policy initiative has been reforming the public tourism administrative system as part of a wider reform of Denmark's business support system (Box 1.2). By the end of 2020, the reform shall result in 15-25 local destination management organisations.

Denmark: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Industry, Business and Financial Affairs, 2020

Tourism policies and programmes

In December 2019, the Danish government announced the development of a national strategy for sustainable growth in Danish tourism. The Danish National Tourism Forum will draft the new national strategy working in close collaboration with the tourism industry and relevant stakeholders. As part of the work, the Danish National Tourism Forum will, among other duties, focus on opportunities and challenges for the Danish tourism industry as result of the need for a more sustainable tourism sector, digitalisation and increased international competition. The National Tourism Forum will also suggest guidelines for sustainable growth in Danish tourism that balances environmental, economic and social sustainability, thus contributing to the UN Sustainable Development Goals. Likewise, the Danish National Tourism Forum will suggest initiatives to strengthen Danish tourism.

The existing National Tourism Strategy (2016) has been the framework guiding the industry's development since 2016. Starting from the common vision of being an engaging tourism destinations and creating a variety of quality experiences, the strategy sets out ten policy priorities:

- The tourism industry should have a robust framework to enable continued growth.
- Efforts made to promote tourism should be effective and the use of public funds in marketing activity should add value.
- Denmark should be marketed in a co-ordinated manner with an emphasis on digital channels.
- Strong destinations should drive growth in tourism.

- Tourists should enjoy high quality experiences in Denmark.
- The digitalisation of Danish tourism should be strengthened.
- It should be easy for tourists to get to and to get around Denmark.
- The tourist industry should be competent and innovative.
- The development of Danish tourism should be evidence-based.
- All of Denmark should welcome tourists.

The Strategy sets out three goals to 2025:

- Grow visitation by a third, equivalent to 17 million more bed-nights compared with 2015: progress is on track, with 2018 bed-nights (0.6 million ahead of target).
- Grow tourism spending to DKK 140 billion, equivalent to an additional DKK 45 billion compared to 2014: progress on track, with 2017 tourism spending of DKK 128 billion ahead of target.
- Visitor satisfaction scores in line with Northern European average: on target.

In 2019, the Danish Board for Local Business Promotion launched two new funds to: i) support local efforts to develop strong and attractive destinations, high-quality tourist experiences and effective international marketing; and ii) support the consolidation of existing tourist information organisations into stronger destination management organisations. With a total budget of DKK 50 million, destination management organisations can apply for the destination development fund, while public entities, enterprises and local organisations can apply for the broader cross-geographical tourism development fund.

In 2017, VisitDenmark launched the first national data strategy for Danish tourism. A core element of this strategy is the TourismTech Data Lake project, to collect data from tourism stakeholders, develop new tourism business models, and create insights into what attracts international tourists to Denmark. In 2019, a pilot project was launched together with private partners to develop a travel prediction model by testing hypotheses about why tourists visit Denmark. In the first stage, hypotheses are tested in each partners own data-pool. At a later stage, a data lake may also be developed.

Statistical Profile

Denmark: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	57 700 e	56 964 e	64 365 e	64 888 e	63 160
Overnight visitors (tourists)	14 620 e	14 954 e	15 208 e	16 333	16 619
Same-day visitors (excursionists)	43 080 e	42 010 e	49 157 e	48 555 e	46 541
Nights in all types of accommodation	63 727	64 664	65 250 |	66 222	67 017
Hotels and similar establishments	11 193	11 861	12 464	12 823	13 176
Other collective establishments	8 913	8 920	8 411	8 148	8 180
Private accommodation	43 620	43 884	44 375 |	45 251	45 661
Inbound tourism					
Total international arrivals	27 607 e	27 764 e	28 121 e	29 766 e	30 089 e
Overnight visitors (tourists)	10 267 e	10 424 e	10 781 e	12 426 e	12 749 e
Same-day visitors (excursionists)	17 340 e	17 340 e	17 340 e	17 340 e	17 340 e
Top markets					
Germany	2 687	2 821	3 048	3 312	3 452
Norway	1 786	1 801	1 767	1 892	1 886
Sweden	1 443	1 438	1 432	1 560	1 572
United Kingdom	744	787	822	937	942
United States	507	514	523	746	780
Nights in all types of accommodation	48 734	50 187	51 729 |	54 914	55 931
Hotels and similar establishments	8 335	8 744	9 039	9 395	9 654
Other collective establishments	2 900	2 920	2 852	2 797	3 121
Private accommodation	37 499	38 524	39 837 |	42 722	43 156
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	8 445	8 920	8 033	8 087	7 475
Same-day visitors (excursionists)
Top destinations					
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TOURISM RECEIPTS AND EXPENDITURE, MILLION DKK					
Inbound tourism					
Total international receipts	58 463	60 122	66 357	71 889	73 390
International travel receipts	42 790	44 959	50 455	56 114	57 470
International passenger transport receipts	15 673	15 164	15 902	15 775	15 920
Outbound tourism					
Total international expenditure	69 277	72 109	73 655	76 294	78 269
International travel expenditure	58 655	60 439	61 769	64 659	66 239
International passenger transport expenditure	10 622	11 669	11 886	11 635	12 030

.. Not available; e Estimated value; | Break in series

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076590>

Denmark: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2017	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	22 755	232 823	241 569	250 526	257 560	..
Accommodation services for visitors	1 882	19 156	19 684	20 270	20 800	..
Hotels and similar establishments	893	..	..	..	..	..
Food and beverage serving industry	13 821	97 011	101 878	108 408	113 586	..
Passenger transport	3 217	53 828	55 914	55 969	55 266	..
Air passenger transport	90	4 459	4 355	4 603	4 457	..
Railways passenger transport	121	6 278	6 199	6 121	6 097	..
Road passenger transport	2 893	24 771	24 563	24 801	24 994	..
Water passenger transport	113	18 320	20 797	20 444	19 718	..
Passenger transport supporting services	10	..	..	..	..	..
Transport equipment rental	248	..	..	..	..	..
Travel agencies and other reservation services industry	603	5 933	6 092	6 411	6 666	..
Cultural industry	1 034	26 965	27 322	..	..	..
Sports and recreation industry	1 940	29 930	30 679	59 467	61 243	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available; | Break in series

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076609>

Denmark: Internal tourism consumption

Million DKK

	2017		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	73 241	54 796	128 037
Tourism characteristic products	43 299	24 293	67 592
Accommodation services for visitors	7 704	7 063	14 766
Food and beverage serving services	11 072	9 886	20 958
Passenger transport services	15 697	5 123	20 820
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	3 497	837	4 334
Cultural services	..	..	..
Sports and recreation services	5 265	1 318	6 583
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	29 942	30 503	60 445
Tourism connected products	21 630	19 237	40 868
Non-tourism related consumption products	8 312	11 266	19 578
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076628>



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