

# Denmark

## Tourism in the economy and outlook for recovery

Tourism is a significant contributor to the Danish economy. The direct contribution of tourism was 2.5% of GVA and 4.1% of employment in 2019. Tourism GVA fell by 37.2% to DKK 31.5 billion in 2020, representing 1.6% of total GVA.

In 2019, tourists spent DKK 139.2 billion in Denmark. Inbound tourists spent DKK 61.5 billion, representing 44% of total tourism expenditure, and 4.4% of all Danish exports. Total tourism spending fell to DKK 103.7 billion in 2020, driven by a 59.8% decline in international tourists, falling to 5.9 million international overnight visitors.

Preliminary estimates suggest that tourism began to recover in 2021, with tourism expenditure increasing to DKK 115.8 billion. Domestic tourism, which continued to grow through the pandemic, contributed DKK 86.9 billion or 75% of total tourist spending in 2021. Compared to pre-pandemic levels, domestic nights increased by 4.7% in 2020, and 20.5% in 2021 to reach 34.3 million nights in tourism-related accommodation.

Denmark is projecting a return of inbound tourism to pre-pandemic levels already by 2022, primarily driven by the German and Dutch tourist markets. Other important tourist markets are still below 2019 levels.

## Tourism governance and funding

The Danish Tourism Law, which came into effect in 2015, regulates the structure, governance and responsibilities of public agencies at the national and local levels. The Ministry of Industry, Business and Financial Affairs is responsible for tourism, but also co-operates with several other ministries on issues relating to tourism, including those with responsibilities for foreign affairs, culture, environment and transport. VisitDenmark manages international branding and marketing and is also responsible for market research and monitoring trends and activity.

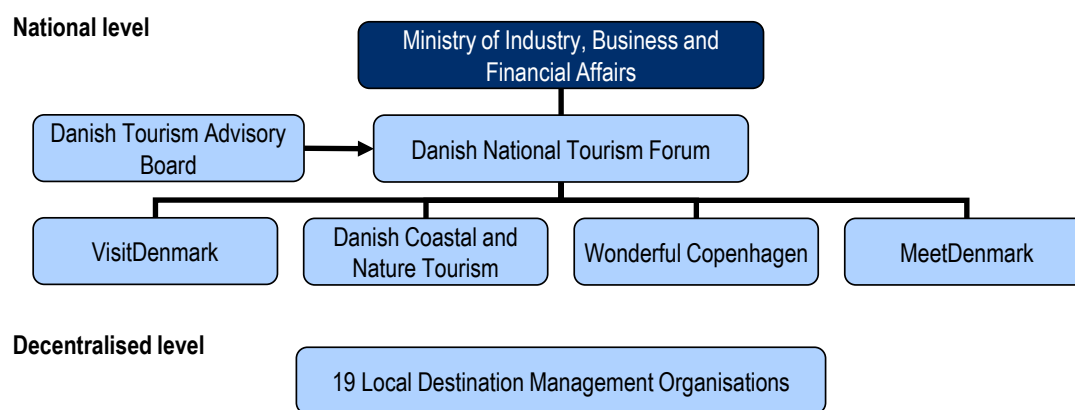
The national tourism administration consists of the Danish National Tourism Forum, the Danish Tourism Advisory Board and four national tourism development organisations: VisitDenmark; Danish Coastal and Nature Tourism; Wonderful Copenhagen (including the tourism development organisation Danish City Tourism); and Danish Business and Conferencing Tourism.

Between 2018 and 2020, as part of an agreement with Local Government Denmark, the number of regional destination management organisations (DMOs) was reduced from 80 to 19 to ensure more consistency between organisations. The role of the 19 decentralised DMOs is to organise, co-ordinate and operate strategic local business-supporting activities, developing geographic areas in Denmark into strong and coherent tourist destinations. The tasks range from developing international marketing activities in collaboration with VisitDenmark to facilitating strategic tourism development projects, which bolster the existing local product and tourist experiences.

The Danish National Tourism Forum was established to strengthen and co-ordinate collaboration within the tourism sector in Denmark. The Forum is chaired by the State Secretary of the Ministry of Industry, Business and Financial Affairs and has representatives from VisitDenmark, Danish Coastal and Nature Tourism and Wonderful Copenhagen, Local Government Denmark, the tourism industry and academia. The Forum is also responsible for drafting national tourism strategies and reporting on the national state of Danish tourism.

The Danish Tourism Advisory Board advises the Danish National Tourism Forum on opportunities and challenges to Danish tourism. It is chaired by the Deputy Permanent Secretary of the Ministry of Industry, Business and Financial Affairs and has additional members from other ministries, industry representatives and civil society.

### Denmark: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Industry, Business and Financial Affairs, 2022.

### Tourism policies and programmes

To promote recovery after the COVID-19 pandemic and prepare for future shocks, Denmark has provided compensation to tourism businesses, totalling more than DKK 19.8 billion. Additional measures were introduced to prevent the bankruptcy of tourism businesses. These included a special focus on hotels, restaurants and conference centres to initiate sustainable initiatives or necessary renovations. Denmark also promoted summer packages in 2020-21 to help hard-hit sectors while creating great holiday experiences for tourists.

In 2022, Denmark launched its new National Strategy for Sustainable Growth in Danish Tourism. It is the guiding strategic framework for the development of Danish tourism towards 2030. The Strategy sets out a common direction for the work of the national tourism organisations and relevant stakeholders by highlighting opportunities and challenges for sustainable tourism, digitalisation trends, international competition and a resilient recovery from the COVID-19 pandemic. The Strategy also incorporates many green and sustainable initiatives, including a partnership to reduce greenhouse gas emissions (Box 3.12).

Starting from a common vision, the strategy sets out three goals that balance environmental, economic and social sustainability towards 2030:

- Pursuing green and sustainable solutions with low environmental and climate footprints.
- Attracting more tourists and larger tourism consumption in Denmark.
- Ensuring that tourists, citizens and employees are satisfied.

These goals are measured with nine indicators. Based on the goals and indicators, the strategy puts forward a set of initiatives to strengthen Danish tourism within five development tracks towards 2030:

- Returning international tourism to Denmark as soon as possible.
- Ensuring the recovery of urban tourism is sustainable.
- Establishing Denmark as an attractive destination for business and conferencing tourism.
- Taking advantage of new potentials and opportunities.
- Following and adapting to the changing preferences of tourists.

With regards to urban tourism, Comeback Copenhagen 2023, a recovery plan for the capital's tourism and cultural life, was launched as part of a collaboration between Wonderful Copenhagen, Copenhagen Municipality and the Ministry of Industry, Business and Financial Affairs. The plan contains several initiatives to prepare the tourism industry in Copenhagen for international competition and to strengthen sustainability initiatives.

## Statistical Profile

## Denmark: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	64 888 e	63 160	67 901	64 215	65 643 p
Overnight visitors (tourists)	16 333	16 619	17 794	19 341	23 414
Same-day visitors (excursionists)	48 555 e	46 541	50 107	44 874	42 229
Nights in all types of accommodation	66 222	67 017	68 025	89 266 e	108 032 p
Hotels and similar establishments	19 654	20 334	21 816	23 288	28 990
Other collective establishments	9 674	9 789	9 314	9 484	10 455
Private accommodation	36 894	36 894	36 894	56 494 e	68 587
<b>Inbound tourism</b>					
Total international arrivals	29 766 e	30 089 e	30 089 e	15 594 e	15 883 p
Overnight visitors (tourists)	12 426 e	12 749 e	14 763 e	5 935 e	7 047
Same-day visitors (excursionists)	17 340 e	17 340 e	17 340 e	9 660 e	8 835
Top markets					
Germany	3 312 e	3 452 e	4 009 e	2 463 e	2 669 e
United States	746 e	780 e	1 063 e	247 e	563 e
Sweden	1 560 e	1 572 e	1 490 e	403 e	557 e
Norway	1 892 e	1 886 e	1 532 e	488 e	412 e
United Kingdom	937 e	942 e	944 e	275 e	240 e
Nights in all types of accommodation	54 914	55 931	57 847	31 464 e	34 813 p
Hotels and similar establishments	28 744	29 306	31 599	16 893	17 832
Other collective establishments	4 129	4 584	3 224	2 531	2 835
Private accommodation	22 041 e	22 041 e	23 024	12 039 e	14 146
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	8 087	7 475	9 088	4 230	3 182
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION DKK</b>					
<b>Inbound tourism</b>					
Total international receipts	74 889	73 702	74 074	31 651	34 798
International travel receipts	56 114	57 533	57 704	25 939	28 357
International passenger transport receipts	18 775	16 169	16 370	5 711	6 441
<b>Outbound tourism</b>					
Total international expenditure	76 294	79 016	80 279	41 158	..
International travel expenditure	64 659	66 574	66 948	36 830	..
International passenger transport expenditure	11 635	12 442	13 331	4 328	..

.. Not available; e Estimated value; p Provisional data; | Break in series

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/oxph9v>

## Denmark: Enterprises and employment in tourism

	Number of establishments <sup>1</sup>	Number of persons employed				
	2020	2017	2018	2019	2020	2021
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>23 764</b>	<b>259 419</b>	<b>267 140</b>	<b>273 199 f</b>	..	..
Accommodation services for visitors	1 915	20 791	21 370	21 940	..	..
Hotels and similar establishments	919	..	..	..	..	..
Food and beverage serving industry	14 277	115 668	119 601	123 092	..	..
Passenger transport	3 719	55 266	55 723	56 169	..	..
Air passenger transport	90	4 545	4 320	3 757	..	..
Railways passenger transport	119	6 096	6 074	6 058	..	..
Road passenger transport	3 397	24 997	25 439	25 855	..	..
Water passenger transport	113	19 717	19 893	20 499	..	..
Passenger transport supporting services	10	..	..	..	..	..
Transport equipment rental	264	..	..	..	..	..
Travel agencies and other reservation services industry	555	6 661	6 746	6 824	..	..
Cultural industry	1 032	28 363	29 419	29 850	..	..
Sports and recreation industry	1 992	32 670	34 281	35 324	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>

.. Not available; f Forecast value

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/4fct1b>

## Denmark: Internal tourism consumption

Million DKK

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>76 734</b>	<b>27 001</b>	<b>103 735</b>
Tourism characteristic products	40 098	9 967	50 064
Accommodation services for visitors	7 534	3 714	11 248
Food and beverage serving services	11 081	3 640	14 721
Passenger transport services	13 497	1 706	15 202
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	2 798	223	3 021
Cultural services	5 093	625	5 718
Sports and recreation services	..	..	..
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	96	59	155
Other consumption products	36 637	17 034	53 671
Tourism connected products	26 403	9 900	36 303
Non-tourism related consumption products	10 234	7 134	17 368
<b>Non-consumption products</b>	<b>..</b>	<b>..</b>	<b>..</b>

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/9pqxu3>



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