ANNUAL TOURISM REPORT 2010
Denmark

1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986[1] establishing a consultation and cooperation procedure in the field of tourism foresees that "each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States".

With the publication of the "Agenda for a sustainable and competitive European tourism", the Commission announced that "in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism".

This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are:

- to be able to monitor the level of implementation of the "Agenda for a sustainable and competitive European tourism" by Member States;

- to facilitate the exchange of experiences among member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year *n* shall be sent to the European Commission by the end of February of year *n*+1.

If the reports are sent in English, the deadline is shifted to the end of April.

2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

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[1] Official Journal L 384, 31/12/1986 P. 0052 – 0053.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

2.1 Please identify the National Bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including key areas of responsibility, and their relationship to other national bodies. (maximum of 1.000 characters)

In 2010 a new Danish legislation altered the structure of the public promotion of tourism. With the new law all policy and agency related tourism matters were transferred from VisitDenmark to the Ministry of Economic and Business Affairs. Thus the ministry is also responsible for the coordination of Danish tourism policy, international policy tasks related to the EU, etc. The ministry co-operates with a number of other Danish authorities, for instance the Ministry of the Environment, including the Danish Forest and Nature Agency (Naturstyrelsen) and the Agency for Spatial and Environmental Planning (By- og Landskabsstyrelsen).

VisitDenmarks primary task is now the international promotion of Denmark as a tourism destination. In order to create a coherent marketing of Denmark as a tourist destination, all public activity (be it regional or local) related to the international promotion of Denmark as a tourism destination has to be coordinated with VisitDenmark. In addition, VisitDenmark also makes annual tourism analyses and is creator of knowledge.

VisitDenmark operates eight overseas offices (in Germany, Sweden, Norway, the Netherlands, Italy, Great Britain, Japan and the United States). Additionally, VisitDenmark is active on an ad-hoc basis in selected markets in South East Asia (China, India, Korea), Spain, France, Russia, Poland, Ireland, Belgium, Luxembourg, Austria, Switzerland, Australia and Iceland. In South East Asia, VisitDenmark forms part of a Scandinavian Tourist Board. In the USA, VisitDenmark cooperates through Scandinavian Tourist Inc. with Sweden, Norway, Finland and Iceland.

2.2 Please, describe what organisations/agencies are used to deliver services at the national and regional level and the services that they deliver. (maximum 800 characters)

National level:

(see above)

Regional level:

Denmark consists of five regions and 98 municipalities. A regional growth forum and a regional development organisation have been established in each of the five regions plus the Baltic island of Bornholm.

Regional Growth Forums

The growth forums consist of regional and local politicians together with representatives of business organisations, educational institutions and social partners (the unions and employers' organisations).

The main purpose of the growth forums is to ensure coherence between state, regional, local and EU funds, including to decide which activities and projects should receive public funding.

Regional Tourism Development Organisations

Additionally, regional tourism development organisations have been established for each of the five regions plus the Baltic island of Bornholm. The regional development organisations' main area of responsibility is to facilitate and guarantee product development, innovation and marketing of tourism within the regions - including fundraising, co-ordination and marketing of cross-regional development themes, co-ordination of human resources development, co-ordination between the regions, provision of tourism development tools and guidelines as well as facilitation of tourism destination development.

Local level

Tourism information

At the local level, the vast majority of Denmark's 98 municipalities operate local tourist informations, which are funded predominantly by each municipality. The tourist informations are responsible for coordinating and delivering tourist services and information as well as product development and marketing at the local level.

Destinations

Also, a number of strong destinations (DMO's) are being developed, each of the destinations consisting of one or more municipalities, tourism organisations and businesses. VisitDenmark has facilitated the process in co-operation with the regional development organisations through seminars, knowledge sharing and development tools. The tourism development destinations are responsible for strategic development and organisational management at destination level, including co-ordination of PR and marketing, destination development projects, fundraising, co-operation between tourism organisations, involvement of the industry, etc.

2.3 Please, describe which other bodies and organisations are involved at the national level and the process for involving them. (maximum 800 characters)

In addition to the Ministry of Business and Economic Affairs, public and private associations as well as NGO's are involved on an ad hoc basis and in relation to specific projects.

2.4 Please provide a diagram/organogram of the organisational structure for tourism identifying the relationship between national, regional and local bodies. Provide also a short description of the core responsibilities and competencies of each of the organisations. Include also information regarding the direct and indirect links between other departments, stakeholder organisations and unions. Information about mechanisms of decision making process participation from outsider organisations, e.g. forums, advisory committees is also requested. (maximum of 2.000 characters)

For a description of each organisation see box 2.1. and 2.2.
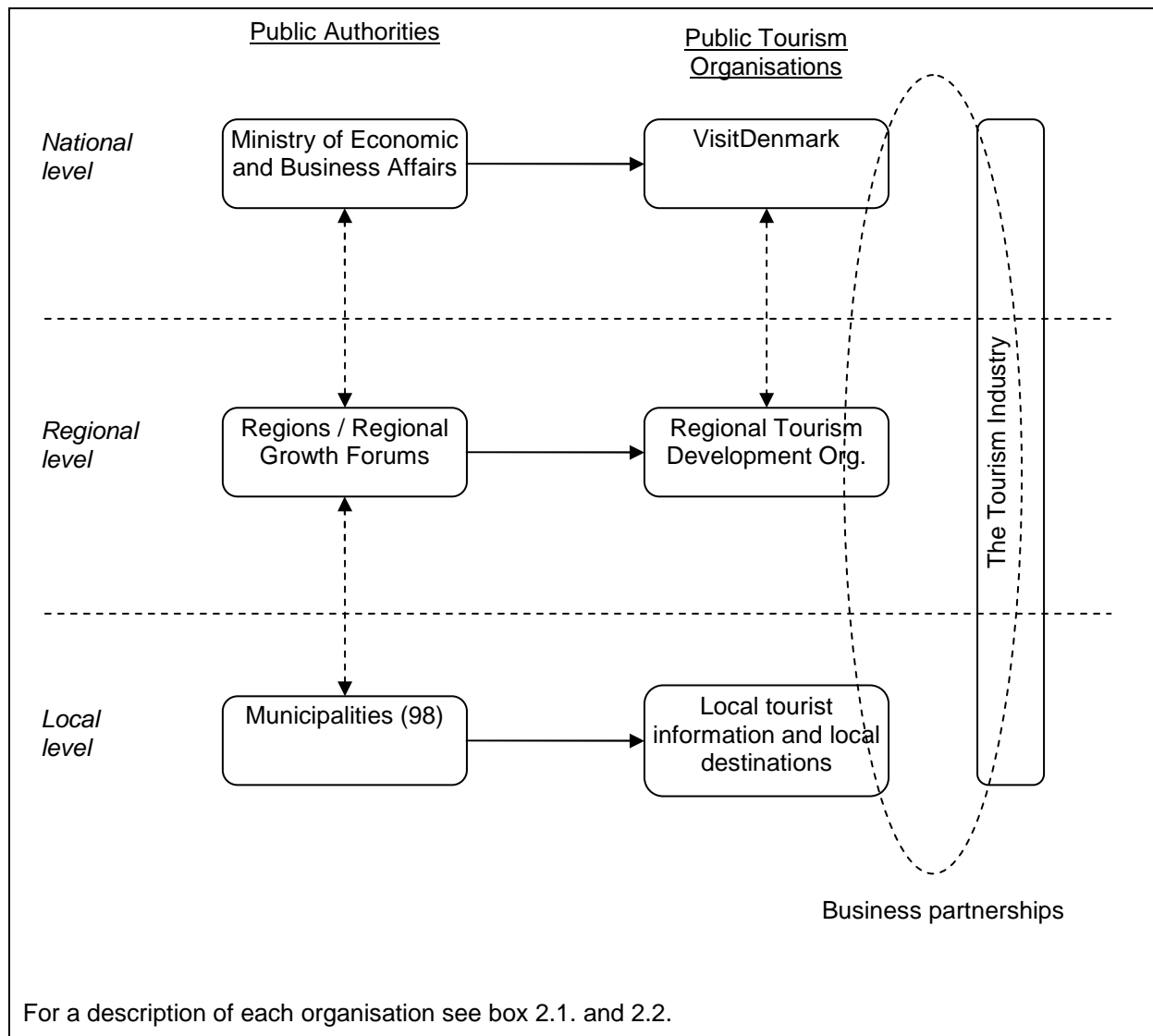
2.5 Please provide information about financial data, including spend/budget on tourism as a percentage of overall government spend/budget, the level of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and Destinations. (500 characters)

Account	2010
National tourism budget	138 million DKK
Level of overall government spending	*App. 0.2 per cent*
Level of national funding support for tourism marketing	134.8 million DKK
EU funding support made available for tourism (budgetary estimate – not final account)	51.98 million DKK

3. POLICIES AND STRATEGIES

3.1 Is there a current National Strategy for tourism?   Yes x   No ☐

If yes, please, provide information in bullet point format about the key aims, objectives and priorities of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In preparing the tourism strategy, explain how consideration has been given to the 9 principles set out in the Agenda (para2.3 p5) and given in the appendix. (maximum 1.000 characters)

On 22 December 2008, the board of directors of VisitDenmark adopted a joint strategy for the development of Danish tourism towards 2015. The strategy has been developed on behalf of all stakeholders in Danish tourism, including regional and local authorities and development organisations as well as private organisations and businesses (more than 600 persons have been involved in the process).

Key aims of the strategy

- To create increased growth and competitiveness
- To recapture market shares
- To generate increased turnover and value creation in the tourism industry
- To stimulate closer co-operation between tourism actors in relation to product development and marketing and stimulate a more professional approach to the development of Danish tourism
- To attract more Danish and foreign investments to the tourism industry, thereby improving the tourism offer.

Vision and mission

The vision states: *"Denmark aims at being recognised for focusing on quality of life and happiness in a creative and sustainable way."*

The mission states: *"Danish tourism creates visible results. We offer our guests unique experiences built upon a sustainable framework for quality of life and happiness."*

The joint strategy maps out a clear direction for the future development based on the values and strengths of Danish society, and thus a framework for quality of life.

New priorities

- Danish tourism should be changed from a focus on "something for everybody" to being "a lot for selected target groups". Consequently, Danish tourism will direct its promotion activities towards more specific and value-creating target groups than previously, according to their motives for travelling and what Denmark has to offer in this regard.
- The strategy calls for a higher degree of collaboration between the tourism actors in creating high-value tourism products and experiences in order to generate a higher turnover and a higher value-added in the tourism sector.

3.2 Who was the initiator and who is responsible for its implementation? (maximum 200 characters)

VisitDenmark

3.3 How is the strategy monitored and how often? (maximum 500 characters)

The strategy is about to be implemented and will be monitored at minimum once a year.

3.4 What tourism specific legislation exists? (maximum 500 characters)

As mentioned in box 2.1 a new law on VisitDenmark was adopted in 2010. With the new law all policy and agency related tourism matters were transferred from VisitDenmark to the Ministry of Economic and Business Affairs. VisitDenmark now only has one main task which is the international promotion of Denmark as a tourism destination.

Furthermore there is a broad spectrum regulation also affecting tourism, for instance taxation rules, environmental planning rules, visa rules etc, but no specific sector regulation.

4. MEASURES AND INITIATIVES

This section provides Member States with an opportunity to outline specific initiatives and policies that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges of the Agenda and which fall within the six main aims of the Agenda itself.

1 Economic prosperity
   a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.
   b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

2 Social equity and cohesion
   a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
   b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

3 Environmental and cultural protection
   a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
   b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

4.1 Please set out, briefly, the steps which have been or will be taken, if any, to address the 7 key challenges for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the 'Agenda'.

4.1.1 Reducing the seasonality of demand. (maximum 200 characters)

In 2006 VisitDenmark initiated the project "All-year tourism" with the aim of developing strong tourist destinations and attracting more tourists off-season. The project was finished in 2009.

The aim of the project was to support innovation, co-operation and growth in Danish tourism and focused on product development (accommodation facilities, attractions, general tourism offers and experiences, tourism service infrastructure etc.) and branding. VisitDenmark was responsible for the project management, including the planning of workshops and seminars, study tours etc.

4.1.2 Addressing the impact of tourism transport. (maximum 200 characters)

Through various research, development and demonstration programmes with af green focus, the danish government supports the development of biofuels, biotechnology, and windpower. In addition to this, the public infrastructure is gradually being upgraded.

The political agreement on transportation of 2010 assured massive investments in bicycle tourism. App. 41 mio. DKK (app. € 4.5) will be invested directly in the efforts to promote bicycle tourism, while the sector also will benefit from more indirect investments such as regional improvement of infrastructure. Notable initiatives specifically targeted bicycle tourism are the Danish hosting of the UCI Road Race World Championship 2011 and a new online gateway making planning of bicycle tourism on the internet easier and more accessible.

4.1.3 Improving the quality of tourism jobs. (maximum 200 characters)

In Denmark, there is a long tradition of close dialogue between employers and the trade unions. This is also the case for tourism.

4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change. (maximum 200 characters)

Here, again, can be mentioned the destination development project, where there was also given priority to types of accommodation, facilities and attractions that reflect the special character of the destination and deliver value to the community, as well as use and promotion of local products etc. (cf. TSG report, p. 12).The project also aimed at developing a more professional tourism sector and destination management organisations, which are able to meet new demands and tackle structural and economic changes.

4.1.5 Minimising resource use and the production of waste. (maximum 200 characters)

Parts of the Danish tourism sector, mainly hotels, have been certified with The Green Key (an

international environmental certification scheme) and are thereby committing themselves to minimising resource use, the production of waste, emissions etc.

Generally, Denmark has a long tradition of integrating business and environmental considerations. This is also the case for tourism.

4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 200 characters)

In 2010, the Heritage Agency of Denmark introduced a series of initiatives concerning the Danish natural and cultural heritage. E.g. the Agency launched a comprehensive website "1001 stories of Denmark", which in a user friendly fashion tells the story about the diverse Danish heritage. Another project by the Heritage Agency of Denmark has improved signage and information at a number of important relics in the Danish landscape.

In 2007 a political initiative concerning the establishment of five Danish National Parks was launched. Three parks have already been inaugurated; *Nationalpark Thy* in 2008, *Nationalpark Mols Bjerge* in 2009 and *Vadehavet* in 2010, while the final two, S*kjern Å and Kongernes Nordsjælland/ Northern Zealand of the kings* are to be finalized within the next few years. The national parks are administered as autonomous foundations under the Danish Ministry of the Environment. The main objective of the parks is nature preservation and development, while the parks' integration into the local communities is another key focal point.

4.1.7 Making holidays available to all. (maximum 200 characters)

Several attractions and facilities are members of the national certification scheme "Access for Everybody" (Tilgængelighed for Alle).

4.2 As key challenges may change over time, please identify any other areas that are becoming a new challenge. (maximum 600 characters)

The Danish minister of Economic and Business Affairs has identified three main challenges for Danish tourism: 1) The price level, 2) productivity in the tourism sector and 3) the changing patterns in the primary target groups of Danish tourism.

4.3 Please identify and describe a specific initiative, which is related to the 7 key challenges, that is innovative/ successful and which would be of interest to or of help to other Member States. (maximum 2.000 characters)

Inspired by the United Nations Climate Change Conference (COP15) that took place in Denmark's capital in December 2009, seven innovative organisations created a coalition to further increase the sustainability of this event and other large international meetings in the future. The initiative is called the Copenhagen Sustainable Meetings Protocol (CSMP). The CSMP offers a flexible, umbrella framework that can be used to organise large, complex meetings in a more sustainable way. The

protocol is intended to inspire planners to strive for excellence sustainability in the management of their meetings now and in the future. The CSMP is an advanced level guide designed to complement the many existing guides present in the market, and it will not only help corporate, government or association event organisers, but also consultants and managers of venues and large hotels.

5. MECHANISMS FOR IMPLEMENTATION

Three mechanisms for implementing the Agenda were identified in the "Agenda": sustainable destinations, sustainable businesses and responsible tourists.

5.1 *Sustainable destinations*: What support is given to strengthen destination management at the regional/ destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 600 characters)

Before the new legislation concerning VisitDenmark, VisitDenmark facilitated the development of destination management organisations (DMOs), knowledge networks and has also published a guide for successful destination development. Now, the responsibility for such programs is at the regional level. The Danish regions are undertaking a wide range of different projects – many of which are also focusing on sustainability.

5.2 *Sustainable businesses*: What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 600 characters)

Ibid.

5.3 *Responsible tourists*: What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 600 characters)

The Danish government has earmarked 1 mill. DKK for a project to be undertaken by the Organization "Hold Danmark Rent". The project aims at strengthening green tourism in Denmark by raising the awareness about the problems of garbage on the beaches and in nature. Furthermore, the project also aims at carrying out activities which will change the tourists' behavior. The goal is to promote responsible and green choices by tourist regarding waste and garbage disposal. The project will be carried out in 2011 and 2012.

Additionally, the Danish Government has provided 31 million DKK for the marketing of green tourism in Denmark.

6. DATA AND INDICATORS

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators[2]. These are mainly related to the aim of 'economic prosperity'.

Please, identify indicators that are being used or developed which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (other indicators from the TSG report, visitors/ residents satisfaction, etc.). (maximum 500 characters)

VisitDenmark are currently working on developing indicators on tourist satisfaction. This could potentially be an area relevant for cooperation with Eurostat.

7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

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[2] These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them at the European level.

APPENDIX

Principles of sustainable tourism:

- **Taking a holistic and integrated approach**

  All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.

- **Planning for the long term**

  Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

- **Achieving an appropriate pace and rhythm of development**

  The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.

- **Involving all stakeholders**

  A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.

- **Using best available knowledge**

  Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.

- **Minimising and managing risk – the precautionary principle**

  Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.

- **Reflecting impacts in costs – user and polluter pays**

  Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.

- **Setting and respecting limits, where appropriate**

  The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

- **Undertaking continuous monitoring**

  Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.