

## UNWTO/WTCF City Tourism Performance Research

### Report for Case Study “Copenhagen”



Summer with kids in the city

Photo by Thomas Rousing

Note: This document is a working paper

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## Background

As part of the UNWTO-WTCF City Tourism Performance Research Survey, an instrument for collecting data that allows evaluating city tourism performance in cities worldwide, data was collected and interviews were conducted in Copenhagen, one of the 16 cities worldwide participating in this exercise.

The UNWTO/WTC City Tourism Performance Research Study includes five key performance areas:

- Destination Management;
- Economic Perspective;
- Social and Cultural;
- Environmental Perspective;
- Technology and New Business Models.

Based on initial desk research and in consultation with Visit Copenhagen, the tourism marketing organization for Copenhagen the Environment Perspective was identified for further investigation.

Data on the performance indicators under each performance criteria were collected from official data sources at national, city and regional level.

Interviews were conducted with Visit Denmark, Wonderful Copenhagen, the national and city marketing organizations, Copenhagen Municipality, industry representative organizations and industry operators.

This report presents the findings from the survey.

# 1. Introduction to Copenhagen

Copenhagen is the capital of the Kingdom of Denmark. It is situated on the eastern coast of the island of Zealand; another small portion of the city is located on Amager.

The city has a population of 763,908, of whom 601,448 live in the Municipality. The larger **Capital Region** has a population of 1.7 million, while the Copenhagen metropolitan area has just over 2 million inhabitants.<sup>1</sup>

According to the Stakeholder Survey and Citizen Assessment Survey 2016 the clear majority (96%) of residents of Greater Copenhagen would be happy to see the number of visitors increase.

Since the turn of the 21st century, Copenhagen has seen strong urban and cultural development, facilitated by investment in its institutions and infrastructure.

The city is the cultural, economic and governmental centre of Denmark. It is one of the major financial centres of Northern Europe with the Copenhagen Stock Exchange. Copenhagen's economy has seen rapid developments in the service sector, especially through initiatives in information technology, pharmaceuticals and clean technology.

The Capital region:

- Generates around 40% of Denmark's GDP;
- Attracts around 85% of foreign investment;
- Creates around 75% of all new jobs in Denmark.

Promoting a healthy environment and good health for its citizens is an extremely important issue for Copenhagen's municipal authorities. Central to its sustainability mission is its "Long Live Copenhagen" scheme in which it has the goal of increasing the life expectancy of citizens, improving quality of life through better standards of health and encouraging more productive lives and equal opportunities.

Copenhagen was appointed European Green Capital of 2014 and has one of the world's most ambitious climate policies - with a goal of being the first carbon neutral capital by 2025. In Copenhagen green and responsible meetings are almost

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<sup>1</sup>Statistics Denmark 2016

impossible not to stage.

The city of Copenhagen and Copenhagen CVB was ranked 2nd in the first-ever sustainability ranking for event destinations worldwide, the Global Destination Sustainability Index, in 2016.

Daylight hours range from 17 in June to 7 in December with temperature averaging 21° C in July to zero and heavy snowfalls in December.

Copenhagen University Hospital forms a conglomerate of several hospitals in the regions, together with the faculty of health sciences at the University of Copenhagen.

### **1.1. Transport infrastructure**

Copenhagen is one of the most bicycle-friendly cities in the world. It has 400 kilometres of cycle lanes, Cycle Super Highways and Green Cycle Routes, cyclist friendly traffic lights and bikes with GPS to find your way around. Bicycles outnumber inhabitants and It is estimated that 36% of commuters cycle to work and study places each day.

The Copenhagen Metro launched in 2002 serves central Copenhagen while the Copenhagen S-train network connects central Copenhagen to the airport and its outlying boroughs. Serving roughly two million passengers a month. The city is well served with roadways and waterways.

Copenhagen Airport, Kastrup, is the largest airport in the country. In 2016, it handled 29 million passengers of which 22% were transfer passengers. The total number of arriving and departing flights was 266,000 serving 159 routes.<sup>2</sup>

Copenhagen is also a significant cruise ship port handling over half a million passengers in 2016 with 87% accounted for in the peak month May to August.<sup>3</sup>

### **1.2. Key attractions**

The cityscape is characterized by parks, promenades and waterfronts. Copenhagen's landmarks such as the Tivoli Gardens, the statue of the Little Mermaid, the

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<sup>2</sup> Copenhagen Airport

<sup>3</sup> Statistics Denmark

Amalienborg and Christiansborg palaces, Rosenborg Castle Gardens, Frederik's Church, many museums, restaurants and nightclubs are significant tourist attractions.

The Tivoli Gardens is an amusement park and pleasure garden. It opened in 1843, making it the second oldest amusement park in the world. Among its rides are the oldest still operating rollercoaster Rutsch ebanen from 1915 and the oldest ferris wheel still in use, opened in 1943. Tivoli Gardens also serves as a venue for various performing arts and as an active part of the cultural scene in Copenhagen.

The new Danish cuisine - part of the new Nordic cuisine movement - has gathered international attention in the new millennium as an inspiring, high quality gourmet cuisine with several acclaimed restaurants. The most popular restaurants for this cuisine are primarily located in the Copenhagen area.

Apart from the new Danish cuisine, Denmark has an increasing number of high quality gourmet restaurants serving an international cuisine that has also attracted international attention. Fifteen restaurants in the Copenhagen area have been awarded Michelin stars.

City life with interesting experiences, friendly and welcoming population, local life, culture, safety and security were the top four reasons cited by “city tourists” for visiting Denmark in recent **Visit Denmark** survey.

**Table 1.1 Foreign “city tourists” to Denmark**

Top 10 reasons for choosing Denmark	%
City life with interesting experiences	77%
Friendly and welcoming population	74%
Local life and culture	72%
Safety and security	70%
Exciting sightseeing	61%
Good/cheap transportation to Denmark	58%
Clean and environmentally friendly	54%
Culture	49%
History	48%
Good places to eat	48%

Source: Visit Denmark - Survey

Copenhagen hosted the World Climate Meeting COPS. This had a very positive impact on climate awareness in the city, heralding a major step forward on sustainability initiatives by the authorities. the commercial community and the public.

### 1.3. Tourism enterprises

Copenhagen has 1,557 accommodation units including hotels and similar establishments with 93,000 bed-spaces for visitors. And over 12,000 restaurants.

**Table 1.2 Number of Tourism Enterprises**

Type of enterprise	Number
Accommodation units for visitors including hotels and similar establishments	1,557
Hotels and similar establishments	532
Guest rooms in hotels and similar establishments	44,200
Bed-spaces in hotels and similar establishments	93,100
Zoos, aquariums and botanic gardens	4
Restaurants	12,385
Museums	130

Source: Wonderful Copenhagen

## 2. Copenhagen tourism trends

Tourist **arrival** figures are not available for Denmark or its regions. The movement of tourist numbers are measured and expressed in bed-nights in hotels, holiday resorts, camping sites, youth hostels, marinas and holiday villages. Of these hotels and holiday resorts are the main providers of bed-spaces.

Between 2008 and 2015 City Tourism in Denmark increased by 69% far ahead of national tourism growth.

In the five years 2012 to 2016 international bed-nights in Copenhagen grew by 26% slightly ahead of the 23% for Denmark. Domestic bed-nights grew by 23% in Copenhagen, double the 11% growth for Denmark. See below.

**Table 2.1 International tourist bed-nights, 2012-2016**

	International tourist bed-nights				
	2012	2013	2014	2015	2016
Copenhagen – Capital region <sup>1</sup>	5,013,163	5,254,607	5,756,351	6,016,024	6,322,354
Denmark	21,858,020	21,818,857	23,224,329	24,731,129	26,092,579

1) Bornholm not included

Source: Statistics Denmark

**Table 2.2 Domestic tourist bed-nights, 2012-2016**

	Domestic tourist bed-nights				
	2012	2013	2014	2015	2016
Copenhagen – Capital region <sup>1</sup>	4,111,047	4,269,746	4,411,168	4,935,232	5,084,451
Denmark	22,570,434	22,71,853	23,589,230	24,421,615	25,361,353

1) Bornholm not included

Source: Statistics Denmark

The main source markets by bed-nights for Copenhagen – Capital Region are:

**Table 2.3 Main source markets by bed-nights**

Source market	% Share
Domestic	43.0
United Kingdom	12.0
Sweden	11.0
United States of America	9.6
Norway	8.8
Germany	8.6

Source: Statistics Denmark

In 2016 bed-nights from the United Kingdom, United States of America, Germany and the Netherlands grew by around ten percent and Italy, Spain and Belgium grew by mid to high twenties while its neighbours: Sweden, Norway and Finland each saw a percentage drop of around five percent.

## 2.1 Tourism revenues

Danish tourism revenue in 2014 was EUR 12 billion with the Capital region generating 40% or EUR 5 billion.

**Table 2.3 Daily spend, 2016 (Euro)**

	Domestic	Foreign	Germany	Norway	UK	Italy/ France	USA	China
Per tourist	191	236	207	253	215	256	192	242
Per day visitor	40	51						

Source: Statistics Denmark

Foreign tourists spent 24% more than domestic tourists and foreign day visitors spent 27% more than domestic day visitors. Tourists from Italy/France, Norway and China were the top daily spenders. The low daily spend by tourists from the United States of America is surprising, as is the high daily spend by Norwegian tourists.

## 2.2 Seasonality trends

In 2016 room occupancy rates in hotels and holiday resorts varied from 93% in August to 55% in January, with the peak months June to September recording occupancy rates of 90% or above.

**Table 2.4 Monthly room percentage occupancy**

Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
55	63	67	78	87	90	91	93	90	82	79	68

Source: Statistics Denmark



**Table 2.5 Seasonality index**

Capital region of Denmark				Share of total Bed-nights
		-	-	
1	January	0.08	0.05	5.0%
2	February	0.17	0.11	5.5%
3	Mach	0.25	0.17	6.5%
4	December	0.33	0.24	6.8%
5	November	0.42	0.31	7.1%
6	April	0.50	0.39	7.6%
7	October	0.58	0.47	8.0%
8	September	0.67	0.56	9.0%
9	May	0.75	0.65	9.3%
10	June	0.83	0.75	9.8%
11	August	0.92	0.87	11.9%
12	July	1.00	1.00	13.4%
	Area b	0.4224		
	Area A-b	0.0776		
	Gini coefficient	0.1552		

Source: Statistics Denmark

### 3. Copenhagen: tourism performance and research survey findings

#### 3.1 Destination management

Table 3.1 Performance criteria

Performance criteria	Yes (✓)/ no (x)
<b>Destination growth strategy</b>	
— Does the destination have a DMO	✓
— Is there a clear vision and governance structure in place	✓
— Is there a sustainable tourism policy and regulations within the overall development strategy for the city	✓
— Differentiation of the destination (USP and/or UEP?)	✓
— Public and private sectors commitment/involvement	✓
— Collaboration with the stakeholders within and across sectors	✓
— Regular update of the strategy and action plan	✓
— Performance measurement tools in place	✓
<b>Visitor satisfaction</b>	
— Repeat visitation (within 5 years)/recommendation	✓
— Analysis of the visitor satisfaction with different elements of destination	✓
— Analysis of the visitor satisfaction with their overall experience at the destination	✓



Three tourism development agencies – Danish Coastal and Nature Tourism, Danish Business and Conferencing Tourism and Danish City Tourism – were established under the first Danish law for tourism. Their responsibilities are to generate growth in their particular sector, based on their own strategies, under the umbrella of the national tourism strategy. Wonderful Copenhagen represents Copenhagen's interests in the areas of City Tourism and Danish and Business Tourism.

Wonderful Copenhagen is the official tourism promotion and development organization for **The Capital Region of Denmark**. The Capital Region consists of the municipalities of Copenhagen and Frederiksberg and the regional municipality of

Bornholm. In Danish the name is Region Hovedstaden, which is one of five regions in Denmark.

The hit song “Wonderful Copenhagen” from the 1952 film “Hans Christian Anderson” and sung by Danny Kaye is the inspiration for the name of the city’s promotional body.

**Greater Copenhagen** is a metropolitan region that spans eastern Denmark and Skane in southern Sweden promoting regional collaboration and economic growth.

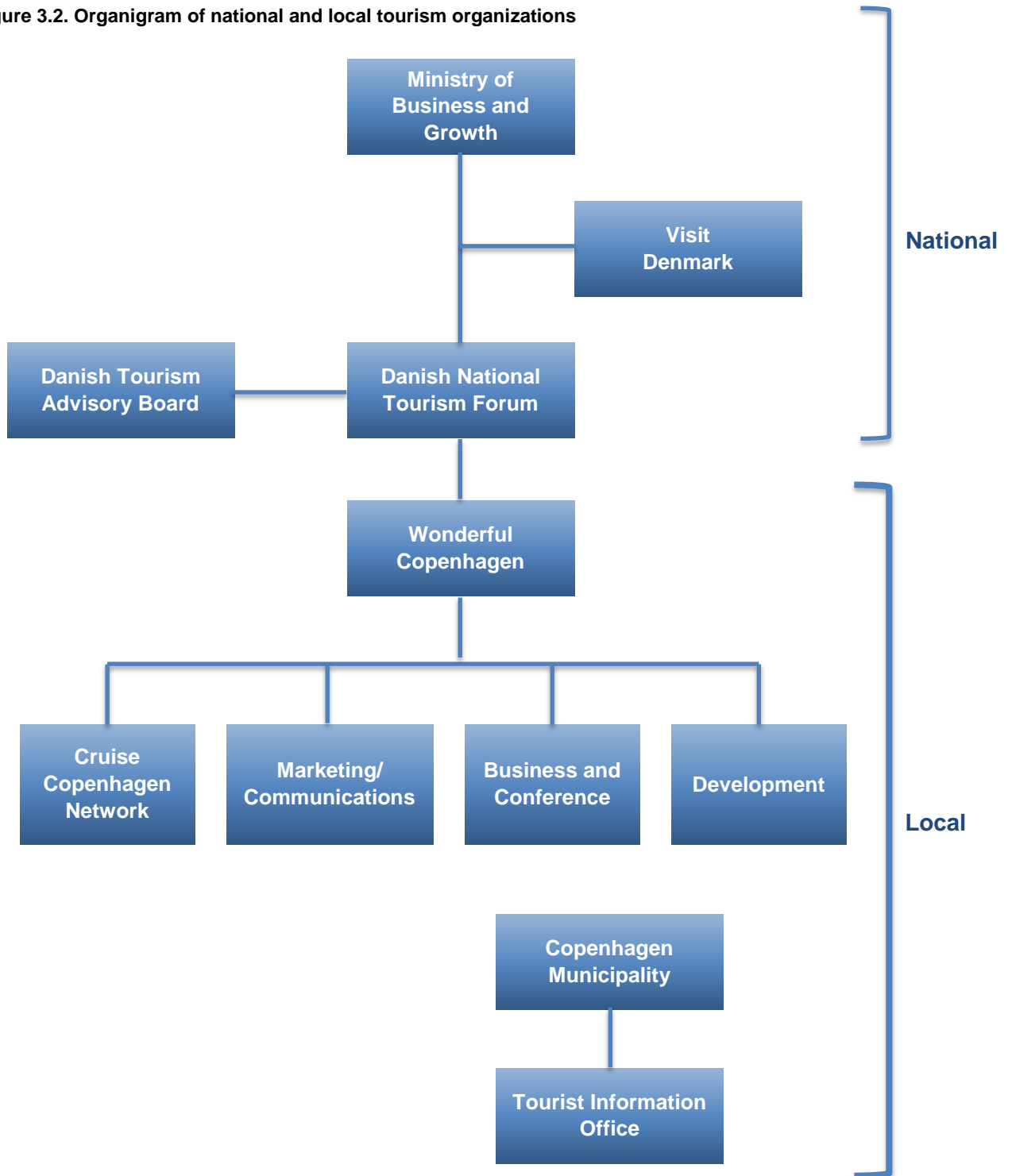
Wonderful Copenhagen promotes and develops both business and leisure tourism in and to the Capital Region on a non-profit basis.

Wonderful Copenhagen has a Board of Directors, six representing the public sector and six the private sector. It is funded from the Capital Region budget and by membership, projects and sales.

It has four divisions:

- **Marketing/Communication:** Promoting the destination through marketing campaigns, PR and travel trade activities. Marketing outside Denmark is conducted, by agreement, in tandem with **Visit Denmark**, the national tourism marketing organization.
- **Cruise:** As “Cruise Copenhagen Network” and “Cruise Baltic” it markets and develops Copenhagen and the Baltic area as a cruise destination through the two networks.
- **Development:** Develops new markets, air routes, knowledge, events, strategy and partnerships. It assists industry participants through training, assistance in creating their marketing actions and activities.
- **Conventions:** Operating as the “Copenhagen Convention Bureau” it promotes Copenhagen as a conventions, meetings and sport events destination. It also works with “Meet Denmark” a network of four larger cities/regions and the Ministry of Business that cooperate with public and private stakeholders and prioritise three areas for conferences, meetings, conventions, incentives, sports and events:
  - Green Growth;
  - Life Science;
  - Information Technology.

Figure 3.2. Organigram of national and local tourism organizations



### 3.1.1 The Ministry of Business and Growth

This ministry holds the tourism portfolio setting national policy for the sector. The annual state investment in tourism growth is around EUR 85 million per year.

### **3.1.2 The Danish National Tourism Forum**

The Danish National Tourism Forum's role is to lead and coordinate the public promotion of Danish Tourism. The primary responsibility of the National Tourism Forum is to develop national strategies for Danish tourism, which is to determine the central priorities and goals for the industry. It oversees the implementation of policy and strategy by the implementing agencies.

### **3.1.3 The Danish Tourism Advisory Board**

The main purpose of this board is to advise the National Tourism Forum and contribute to drafting the national tourism strategy. It also helps co-ordinate the national strategy and sector initiatives issued by individual ministries. The Advisory Board comprises a chairman, 17 members and two observers, all appointed by the Ministry of Business and Growth. The 17 members represent a wide range of tourism interests to ensure a professional and competent board.

### **3.1.4 Copenhagen goodwill ambassadors**

Founded in 1996 to assist in the promotion of Danish economic, social and cultural interests around the world It has a membership of over 60 "Global Danes" - business leaders, entrepreneurs, innovators, cultural leaders, branding experts and public opinion formers, living and working in more than 25 countries worldwide.

They come together once a year with government representatives, Danish business, cultural people and decision makers to be briefed on international initiatives, challenges and successes of Copenhagen.

Together with external partners and participants, the Goodwill Ambassadors provide their input and knowledge and open doors to improve Copenhagen and Denmark's international competitiveness and to identify the potential for development.

### **3.1.5 Copenhagen Municipality – Tourist Information Office**

The Municipality through its Culture and Internationalisation Division provides services to tourists in its Tourist Information Office situated in the heart of the city opposite the Tivoli Gardens. It is funded by the Municipality and income from display space offered to industry. A private owned commercial TIO also operates near the

official one. Tourists who sought information there complained later to the official TIO that they were pressed to purchase tours and tickets rather than getting the information they sought.

These services include information, guidance, reservations and tickets for museums etc. It seeks visitor and tourist comment and recommendations and follows up on resolving tourist complaints. Feedback from visitors and tourists is shared with the industry and other stakeholders.

Amongst the advice sought is “how to be better green tourists”. To meet this, the Municipality is producing a guide for visitors. be better green tourists, respecting the city and explaining the city’s activities and actions to conserve energy, have a clean environment and respect nature with suggestions for tourists on how to contribute to and be part of the effort.

The city brand is based on five stories highlighting the city as a place for:

- Architecture and design with its distinct architecture old and new and Denmark and the city being a centre for good design. Design is of special attraction for Asian visitors;
- Sustainability, environment, energy etc.;
- Good Food, promotion of organic food and many starred restaurants;
- Tolerance;
- Big city, small scale. While it is a big city it is very manageable for tourists to get around and enjoy its attractions and feel involved.

### **3.2 Tourism policy, strategy and activities**

In 2011 and 2012, Denmark saw a decline in the number of international bed-nights. Reasons identified included shorter holidays, competition, low value for money compared to other destinations and Denmark’s low profile in in the marketplace. Denmark was losing market share. In 2014 the Parliament agreed a growth plan for tourism and the completion of a national tourism strategy. To address the value for money issue and new markets stimulation, quality tourism, city and business, coastal and nature tourism must be developed. New targets and objectives were set and a new strategy was to be produced which would govern the activities of Visit Denmark and Wonderful Copenhagen.

Following this Copenhagen developed a **Business and Growth Policy 2015 - 2020** and **Wonderful Copenhagen – The New Strategy** for the city and its tourism development.

### **3.2.1 Business and growth policy 2015 - 2020**

To attract new residents and tourists Copenhagen must maintain its status as a liveable city and must be on the Top Three of Europe's best cities. The city's green environmental profile and willingness to implement solutions to global challenges will benefit everybody as will Copenhagen's trademark policy that growth and welfare go together.

The policy is built on a series of priority initiatives to make the city more attractive to businesses. These include:

- Sustainable city development and a liveable city with enhanced mobility, continue as a green creative and smart city;
- Increased digitisation of city services and enhanced service culture;
- Support youth training and education and help businesses find suitably qualified employees;
- Ensure a sustainable job market with more placement opportunities, socio economic businesses and use the city's purchase power to further social responsibility;
- Generate innovation partnerships between business, knowledge institutions and the city to support growth in existing businesses;
- Strengthen Copenhagen's international attractiveness, international access and attraction to international talents.

Ambitious growth targets were set including a five percent GDP growth per year for the city is targeted towards 2020 as is 20,000 new jobs in the private sector. The city must maintain its status as a most liveable city and, as mentioned already, be one of the top three in Europe.

In travel and tourism specific targets were set. Tourism to grow by 5% annually in tourist arrivals and for Copenhagen airport a 5% annual growth in passenger numbers.

*The policy put emphasis on the city being attractive to its businesses, residents and its visitors and maintain its position as one of Europe's top three best cities. A green and smart city equipping its youth for suitable employment.*

*It set GDP, jobs and tourism targets for 2020.*

### **3.2.2 Wonderful Copenhagen – the new strategy**

As stated above Wonderful Copenhagen is the development and marketing body for the Capital Region and includes the promotion of cruise tourism and conferences and meetings.

At the end of 2016 Wonderful Copenhagen launched a ground breaking new strategy to bring it to 2020 and beyond, entitled “**An End of Tourism as We Know It, Towards A New Beginning of Localhood**” which puts people (residents and visitors) at the centre of its future tourism.

The strategy for the future for the Capital Region tourism sees the residents, the industry and the visitors as one. It is recognising that successful tourism can be very negative on the resident's quality of life unless they share in the path it is taking, are involved in inputting to decision-making and share the experiences with the visitors. Future tourism must be of benefit to both the local residents and the visitors.

The strategy describes today's traveller as “the temporary local seeking not the perfect still picture to take home, but the emotional connection to an instantly shared experience based on interests, relations and authenticity.

*“We embark upon an era in which the advocacy of our locals is crucial to delivering the destination experience in demand. An era in which that advocacy, in turn, depends on the value added by our visitors.”*

Source: Wonderful Copenhagen CEO.

Eight key movements were identified in moving to change the direction for tourism including:

- The experience of **localhood** – today's traveller wants experiences and local involvement;



- Locals are the **destination**;
- Branding is all about **relations**;
- **From marketing to enabling** – developing and spotlighting the right kind of experiences, people and stories;
- A traveller are **all kinds of human** – each with own culture, motivations and way of relating;
- Global urban travellers – increasing urban dwelling will **increase pressures** on urban destinations;
- Digital is yesterday's question: new data is today's. **Digital big data can provide** depictions of visitor behaviour, trends and potential;
- Agility to change and fail fast – DMO's KPIs need to **adapt and extend** to broader values.

The following is a synopsis of the vision set out in the strategy:

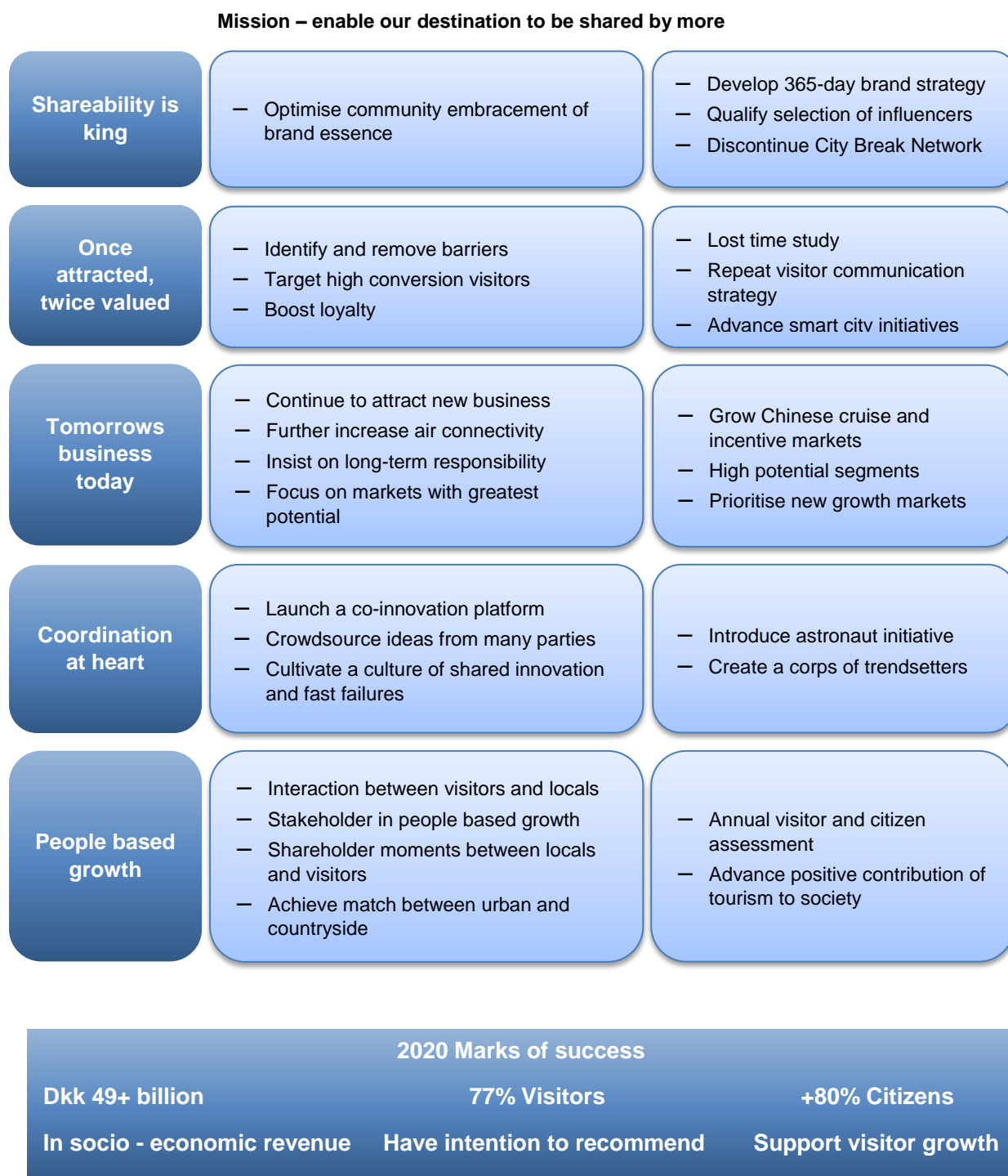
*"To co-create this future of growth, where the right kind of growth benefits more people and more businesses, our vision is a destination, where tourism is considered an inclusive, comprehensive challenge and an open opportunity shared by many – across borders and businesses. Where our destination invites more people – here and abroad – to take part and be part of our destination. In short, our vision is...Localhood for everyone"*

Source: Wonderful Copenhagen

Five strategic coordinates are outlined to keep the destination on track:

1. **Shareability is king:** To enable travellers, partners and influencers to create shareable moments;
2. **Once attracted, twice valued:** A strategy to encourage repeat visitation;
3. **Tomorrow's business today:** Attracting new visitors from growing markets;
4. **Co-innovation at heart:** Opportunities for the industry to work together for the benefit of all;
5. **People-based growth:** Making tourism a win-win scenario for residents and visitors. "Visitor growth in itself is not a goal. Increasing the value of visitors for all parties is."

**Figure 3.2 Vision – Localhood for everyone**



*The strategy puts people at the centre of its future tourism and sees residents, industry and visitors as one. A successful tourism requires the support of the residents. Involvement in shaping the future of tourism in their city will help ensure such support.*

*Visitors need to experience the locals and local areas and take home a shared experience and not just a still picture.*

*Value for all is the goal, not just numbers.*

To widen the appeal a city-wide study is underway to identify potential bottlenecks and pressure points in the city that could create roadblocks and frustrations for visitors and potentially also for locals. Hopefully this will facilitate visitors widening the range of localities and attractions they experience in the city. Data collection on visitor movements is being looked at to help in this study.

## **Activities**

Wonderful Copenhagen promotes and develops the tourism of The Capital of Region of Denmark through four different business divisions:

1. **Convention:** Ensures conventions, meetings and sport events, operating as Copenhagen Convention Bureau.
2. **Cruise:** Promotes and develops cruise tourism via two networks: Cruise Copenhagen Network and Cruise Baltic.
3. **Communication:** Promotes the destination through marketing, campaigns, PR, travel trade activities and promotion of the Copenhagen Card, the official city card of Copenhagen.
4. **Development:** Develops new markets, air routes, knowledge, events, strategy and partnerships.

The local people and visitors are centre to the marketing of Copenhagen and of course the feeling of “Big City Small Space” comes across in its promotions using the web and social media – Twitter, Facebook, YouTube, Instagram etc. Visitors are prompted to do like the locals do as suggested by locals – areas to visit, hidden gems, favourite places to eat, socialise and even grocery shop, including supermarkets.

To enable visitors share time and food with locals “Meet the Danes” is a unique concept with locals signed up to host visitors for home cooked dinner, learning about each other and each other’s lifestyle, culture and families. The host, the price, payment and other arrangements are selected and confirmed on line.

The city’s ease of moving around is highlighted. With the trains, trams, walking and cycling with their own cycle lanes and dedicated traffic lights as options.

Denmark’s and Copenhagen’s clean air, friendly, informal atmosphere is ideal for taking in the sights and major place of interest.

#### **4. Environmental perspective**

Copenhagen is acknowledged as a green city with a focus on sustainability and is known in the meetings industry as the Capital of Sustainable Meetings. Sustainability and quality of life are also focal points in Wonderful Copenhagen’s marketing policy. Especially since it is something tourists take note of and feel when visiting. Whether it is the clean air, clean water, smart technological solutions or responsible businesses.

Copenhagen was appointed European Green Capital of 2014. It plans to become the world’s first completely CO2 neutral capital by 2025. The municipality works with a holistic sustainability concept, where environment and climate are not isolated but viewed in relation to social and economic sustainability, both locally and globally, regarding future generations. Today, a majority of the hotels and conference venues in Copenhagen excel in green labelling and implement sustainable initiatives of different kinds. The restaurants focus on minimising food waste and use local produce. All this contributes to strengthening the overall reduction of CO2 omission and leaves a less harmful imprint on the environment.

- 71% of all the city's hotel rooms hold an official eco-certification.
- Organic food makes up 17% of the total food sale in Copenhagen, which is the highest in Denmark.
- 75% of the food consumption in the City of Copenhagen's public institutions is organic.
- Only 29% of the households in Copenhagen own a car.
- There are more bikes than inhabitants in Copenhagen.
- Each day people cycle 1.2 million kilometres in Copenhagen.
- 37% of the commuters going to work or school in Copenhagen use their bicycles. For people living in Copenhagen, it is 55%.
- 25% of all families with two kids in Copenhagen own a cargo bike or a bicycle trailer.
- All taxis in Copenhagen have racks for carrying two bikes.
- In Copenhagen, you can bring your bike on S-trains for free.

#### **4.1 Wonderful Copenhagen's environmental policy 2016**

In 2015, the UN adopted 17 ambitious global goals that establish the framework for the global development efforts towards 2030. Wonderful Copenhagen aims to contribute to this global agenda. Many of the goals are directly and indirectly linked to Copenhagen as a city and to tourism in the broader sense: to promote sustainable and renewable economic growth, full and productive employment as well as decent work opportunities for all.

The Capital Region of Denmark and The City of Copenhagen are ambitious in regard to sustainability. Copenhagen is known as a city, which has made great progress in regard to innovation and sustainable initiatives in both research and technology. The clean water in the city's harbour, the effective infrastructure and world-leading public transportation system as well as the many cyclists are just some of the environmental initiatives that characterise our destination and that have inspired other destinations around the world. The ambition in the Capital Region of Denmark's growth and development strategy for Greater Copenhagen is to be a green and innovative metropolis with high growth rates and quality of life. The City of Copenhagen plans to

become the world's first completely CO2 neutral capital by 2025. The municipality works with a holistic sustainability concept, where environment and climate are not isolated but viewed in relation to social and economic sustainability, both locally and globally, in regard to future generations. Wonderful Copenhagen wants to support this UN agenda.

## 4.2 Density

**Table 4.1 Public green spaces**

Performance criteria	Volume/Value	Year of analysis	Source
Number of parks	564 parks and green areas registered	2016	KK.dk/groenneomraader
% of preserved areas/reservoirs/waterways/parks in relation to total land area	25% <sup>1</sup>	2017	Kopenhavns Kommune Teknik-Og Miljøforvaltningen
% of green space (public parks) coverage in relation to city area and/or population size	25%		Kopenhavns Kommune Teknik-Og Miljøforvaltningen
1) Open spaces: excludes cemetery land			

**Table 4.2 Greenhouse gasses and energy efficiency**

Performance criteria	Volume/Value	Year of analysis	Source
Total amount of GHG emissions for the city and per capita	1.45 million tons of CO2 2,5 tons per inhabitant	2015	Municipality
% of total energy consumed in the city that comes from renewable sources	71% for electricity 52% for heating		www.Energinet.dk www.hofo.dk

The Capital Region of Denmark, together with the state, local authorities and transport operators will implement new solutions to the climate challenge, including introducing fossil-free fuels for busses and other public transport, increasing the amount of cycle superhighways and other cycling infrastructure.

Together with local authorities and other relevant parties the capital Region will work to reduce noise and air pollution.

## 4.3 Mobility

**Table 4.3 Mobility**

Performance criteria	Volume/Value	Year of analysis	Source
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Transportation mode split (Percentage of each mode of transportation, i.e. private, public, bicycles, pedestrians)	Bicycles 30% Public Transport 20% Car 33% Walking 17%	2014	Ref: <a href="http://kk.sites.itera.dk/apps/kk_pub2/?mode=detalje&amp;id=1382">HTTP://kk.sites.itera.dk/apps/kk_pub2/?mode=detalje&amp;id=1382</a>
Average commute time and cost	NA		
% of tourists and same-day visitors using different modes of transport to arrive at the destination	Air 53% Car 22% Train 13% Car Ferry 6% Bus 2% Motorbike 3%	2016	Storbyturisterne: Denmark
Number of EV charging stations within the city	249 Charging Stations on public roads in Copenhagen		
Kilometers of bicycle paths and lanes	368 km Cycle paths 28 km cycle lanes	2014	Ref: <a href="http://kk.sites.itera.dk/apps/kk_pub2/?mode=etalje&amp;id=1362">http://kk.sites.itera.dk/apps/kk_pub2/?mode=etalje&amp;id=1362</a>
Is car sharing available at destination?	No		
Is bike sharing available at destination?	Yes, Bike hire		

Copenhagen was ranked “World’s Most Walkable City” by Walk 21 in 2013. Its compact city centre makes walking between venues, hotels and shopping areas a matter of minutes. The city’s rush hour differs from most other cities in that it is not the roads but the bicycle lanes which are crowded. Bikes for hire are now available with assisted electric power and GPS. The existing modes of transport and the planned improvements indicate a further welcome reduction in CO emissions and a healthier population.

Public transport accounting for just 20% of all modes of transport would appear low until account is taken of just 33% using private motor cars. Air being the principle mode for arriving tourists and visitors reflects the medium to long-haul arrivals. Regional arrivals using ground transport and car ferries.



**Mother biking her kids, Kasper Thye (Wonderful Copenhagen)**

## 4.4 Water quality

**Table 4.3 Water quality/availability**

Performance criteria	Volume/Value	Year of analysis	Source
Total amount of water availability	100% availability	2016	
Water quality index/score	100% Potable water	2016	
Proportion of population with access to adequate and safe drinking water	100%	2016	

Copenhagen is blessed with an excellent water supply. The fact that the locals recognise this is evident in the rarity of bottled water with them on the streets or on transport. Bottled water is not provided in hotel rooms or as mentioned later at conferences and meetings.

## 4.5 Air quality

**Table 4.4 Air quality**

Performance criteria	Volume/Value	Year of analysis	Source
Levels of Particulate Matter (PM10 – mg/m3)	See below	2015	Danish Air Quality Management Program
Levels of Particulate Matter (PM2.5 – mg/m3)	See below	2015	Danish Air Quality Management Program
Number of days per year on which alarm levels are exceeded	none		



**Table 4.5 Annual statistics for PM2.5 and PM10 in 2015**

Unit µg/m3	Number of results	Average (µg/m3)	Median	Days above 50 µg/m3	90 percentile	Max. day
<b>PM10</b>						
Copenhagen/City center street 1	358	29	26	26	43	75
Copenhagen/City center street 2	360	23	21	13	38	76
Copenhagen/Urban background	354	18	16	4	30	64
<b>PM2.5</b>						
Copenhagen/City center street 1	338	16	13		27	59
Copenhagen/City center street 2	359	14	12		26	59
Copenhagen/Urban background	338	12	9		22	54

All parameters are given as diurnal averages at ambient temperature and pressure.

Table showing levels of particulate matter in Copenhagen. Source: Ellermann, T., Nygaard, J., Nøjgaard, J.K., Nordstrøm, C., Brandt, J., Christensen, J., Ketzel, M., Massling, A. & Jensen, S.S. 2016. The Danish Air Quality Monitoring Programme. Annual Summary for 2015. Aarhus University, DCE – Danish Centre for Environment and Energy, 65 pp. Scientific Report from DCE – Danish Centre for Environment and Energy No. 201.

## 4.6 Waste/recycle

**Table 4.6 Waste/reuse/recycle/sewage treatment**

Performance criteria	Volume/Value	Year of analysis	Source
Recycling rate (percentage diverted from waste stream)	35% of the household waste recycling. Commercial waste is not included in this number	2016	Ministry of Energy, Utilities and Energy (MEUE)
Volume of solid waste generated	304 kg/capita from households.	2016	MEUE
Waste production per tourist night compared to general population waste production per person (kg)	NA		
% of tourism enterprises separating different types of waste	All larger hotels through a process to start separation of waste. Number not known	2016	MEUE
% of total waste recycled per tourist compared to total waste recycled per resident per year	NA		
% of sewage from the destination treated to at least secondary level prior to discharge	All waste water is treated in waste water treatment plants	2016	MEUE

Waste management is a high priority. Private households recycling 35% of their waste is very satisfactory. Most hotels have separation for recycling in operation and progressing to minimising waste. There is an issue with the waste from cruise ships as they do not separate the waste on board so the authorities have to have it done ashore when it comes off the ships.

## 4.7 Sustainable tourism strategy and regulations

Table 4.7 Sustainable tourism strategy and regulations

Performance criteria	Volume/Value	Year of analysis	Source
% of local enterprises in the tourism sector actively supporting protection, conservation and management of local biodiversity and landscapes	Over 200 establishments awarded Green Key  70% of hotel rooms eco-certified	2017	HORESTA-

“Green Key” a voluntary hotel, conference centres, hostels etc. sector eco-label

Many of the city’s convention venues are Green Key certified, including the two largest venues Bella Centre and Tivoli Congress Centre.

International hotel chains such as Hilton and Radisson have their own environmental programs. The Crown Plaza Towers and Guldensberg Hotels in Copenhagen are both eco and organic (See annex).

A great selection of the city’s restaurant, cafés and hotels are riding the “green-wave”, taking the city to a completely new level of eco-friendliness ensuring that you can eat environmentally friendly food at all price levels.

Today, a majority of the hotels and conference venues in Copenhagen excel in green labelling and implement sustainable initiatives of different kinds. The restaurants focus on minimising food waste and use local produce. Restaurant Geranium holds three Michelin-stars and only serves organic food and beverages and, in general, you will encounter an increasing desire for largely Nordic produce and food made in harmony with nature.

During the UN Climate Change Conference COP15 held in Copenhagen in 2009, 75% of the food for the 30,000+ participants was organic - and reasonably priced.

## 4.8 Tourism related jobs and gender balance

Tourism supports just under 65,000 jobs in accommodation, food services, arts, entertainment and recreation in Copenhagen. This does not take account of the tourism supported jobs in transport and other services.

It is interesting to note that the gender balance is nearly equal with just a 5% difference between male and female employees.

**Table 4.8 Tourism related jobs in Copenhagen**

	Accommodation and food	Arts, entertainment and recreation	Total	Percentage
Male	22,563	11,559	34,122	47.5
Female	19,845	10,997	30,842	52.5
Total	42,408	22,546	64,964	100

Source: Wonderful Copenhagen

## **4.9 Green, local and seasonal produce to the locals**

In early this year (2017) mobile food markets were introduced to travel to six residential locations on a designated day each week. Blue and white coloured bicycles specially set up as street markets, offering fresh fruit, vegetables, meat, fish and bread for sale to the locals in their own neighbourhoods.

These promote locally sourced fresh ecological vegetables etc. and strengthen the feeling of neighbourhood and social interaction.

## **Annex Best Practice Examples**

### **Guldsmeden Hotel 66 Copenhagen**

#### **Introduction**

Guldsmeden Hotel 66 Copenhagen is one of a group of nine hotels, five in Copenhagen and one each in Oslo, Reykjavik, Berlin and Aarhus with a total of 750 bedrooms. Three of the hotels are franchise and six owned by the group. The first hotel was opened in Guldsmedegade (hence the name) in Aarhus in 1999 by Sandra and Marc Weinert who are still the owners of the group. The group also includes a rental village in the south of France and a luxury resort in Bali. The group is financially successful.

From the beginning, luxurious simplicity, happy and unpretentious atmosphere and above all uncompromising sustainability have been the guiding principles.

Hotel 66 is in an old building in central Copenhagen opened in 2002 as the first Guldsmeden hotel in Copenhagen. It has 74 bedrooms. It has central heating but no air-conditioning which is not unusual in Denmark. It is **Green Globe Certified** which sets some very high sustainability standards for every aspect of the daily operation with regular inspections. Fulfilling their requirements is demanding but they have been very helpful with advice.

#### **Food and drinks**

All food and drinks are 99% organic, seasonal and sourced locally. The food has been awarded the Ø-label which is regulated by the Danish and Norwegian Ministries of Food and Agriculture. The hotel aims to minimize food waste with the slogan for guests “Take all you can eat. Eat all you can take” and all food waste in a special bin in the kitchen is measured each day. This identifies waste to the staff, now they are considering a waste bin in the dining room to identify customers’ food waste to the customers. To use bread that is stale it is toasted and they hold that it is more suitable for toasting than fresh bread. Their yogurts are home made with local ingredients – including honey and fruit.

## **Flowers**

Fresh cut flowers are not used. Instead its potted plants watered with gathered rainwater.

## **Energy**

They rely on green energy for which they pay their supplier extra. A percentage of which the supplier passes on to increasing the production of green energy. Lighting in public areas is movement sensitive and guests are urged to conserve energy by turning off lights and heating when not needed.

## **Guest Toiletries etc.**

The following are produced organically: soaps, shampoos, creams cleaning materials and plastics are avoided. For instance, for guests who have forgotten handout toothbrushes are made from bamboo and the toothpaste comes in tablet form in paper wrapping. The tablets are chewed to become a paste. These are all produced by a sister company. Utensils in the bathrooms are recycled plastic.

## **Marketing and reservations**

Advertising is not one of their marketing tools. They depend on editorial publicity, their website and social media. They have 10,000 followers on Facebook and 3,000 on Instagram. They created a bookings site “I Love Eco Hotels” for financial and informing reasons as the OTAs do not explain their operation. There is a loyalty programme for bookings on their own site. This also has the software to reach out to other sustainable hotels to join.

## **Social involvement**

The company supports disadvantaged children and anti-human trafficking contributions from their booking site and bicycle hire income and through the Danish Sports Federation and others.

# **Crown Plaza Copenhagen Towers**

## **Introduction**

The Crown Plaza Copenhagen Towers, a five-star hotel is situated in a suburb of the city adjacent to the Bella Center convention hall. The Crown Plaza is part of the IHG group. In building the hotel, one of the objectives was to make it the greenest hotel in the world. In the construction of the hotel, building rubble, old tires and old delf were all used as a conservation exercise.

## **Food and Drinks**

Organic food is used as much as possible, sourced locally and in season. Food and beverage miles are monitored, local suppliers are preferred as is transport by ship preferred to trucks.

The hotel has its own piggery. Their feeding is supplemented by food waste from the hotel. On average, the hotel uses 25 pigs per week. For beef they purchase the whole animal. For both the pork and beef the butchering is done in the hotel ensuring that all parts of the animals are used in the kitchens.

For conferences and meetings natural water is provided on the tables unless the client requests bottled water.

## **Energy**

Solar panels on the outside of the building supply 12% of its electricity, the balance comes from wind for which they pay a premium. On a national basis 58% of the electricity supply is from wind or solar.

Ground water from underground wells is the source for air conditioning in summer coming up cold, returned to the wells heated, to contribute to heating the hotel in winter. If necessary in very low temperatures the biomass produced district energy system is tapped.

All lighting and heating/air-conditioning is IT monitored and controlled in public areas, meeting rooms etc. If the guest is not in the bedroom the monitor ensures energy is off or reduced.

The Crown Plaza Towers uses 80% less energy than the average for the hotels in the group.



**Crown Plaza Towers, Atrium**

The hotel 1,400 square metre atrium with its indoor forest of 60 trees and 4,500 shrubs contributes to the indoor climate for the ground floor of the hotel. It also brings out the soul of the hotel.

## **Cleaning**

All cleaning is chemical free. They use a Nanotechnology invented process. Guests are encouraged to forgo bedroom cleaning every day by earning a DKK 75 voucher which can be used in the hotel.

## **Social involvement**

The hotel management focusses helping marginalised groups such as refugees. In 2016, they employed 30 refugees who were taught languages went through skills training and upgrading supported by a mentoring programme. 12 of the 30 are still in the hotel, the others have moved on to jobs elsewhere. In 2017, 40 have been taken on.

Another focus is on skills development for local youths through internships involving skills training and vocabulary improvement.

In general we also add some kind of additional chapter with a short summary and also hot issues/challenges in/for the destination.

Also a list of interviewees and the bibliography with all sources used or quoted is an obligatory part of the report.

As a little extra (it is not part of the job itself but some kind of appreciation for the hospitality received) we kindly ask the experts to provide some kind of “observations/recommendation of the experts” which are based on your own experience on one hand and on your experience when visiting the destination carrying out the interviews, applying the methodology. Are there any weaknesses or any issues that they are not aware of? A one or two pager is sufficient and should come as a separate document.