



International Network
on Regional Economics,
Mobility and Tourism

In support of



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Denmark's experiences on the regional TSA and tourism economic impact analysis

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Status on the regional TSA in Denmark

- Tourist survey strategy in VDK
- Danish tourist survey started in 1996
- Collected by The Danish National Centre for Social Research
- Survey is performed every 3 years

Status on the regional TSA in Denmark

- Random sample drawn by Statistics Denmark
- 12000 interviews
- Questionnaire targeted at business tourism and separate questionnaire targeted at leisure tourism.

Status on the regional TSA in Denmark

- Mapping of tourism
 - Consumption patterns
 - Target Audiences
 - Motives
 - Transportation

Status on the regional TSA in Denmark

- Results of RTSA 2010':
- Tourism expenditure 74.6 billion DKK
- 109,000 jobs created

- Business Tourism = 22.4 billion DKK – 39000 jobs
- City Tourism = 18.4 billion DKK – 26000 jobs
- Coastal Tourism = 33.7 billion DKK – 44000 jobs

Assessing the Economic Importance of Meetings Activities in Denmark

- This is a project initiated, carried out and financed by Visit Denmark;
- Project was inspired by the UNWTO publication: “**Measuring the Economic Importance of the Meetings Industry**”;
- Visit Denmark has carried out three surveys: **venue, organizers and delegate surveys**;
- Centre for Regional and Tourism Research (CRT) has carried out the tasks for making the **satellite accounts** and evaluating the **economic and employment impacts** of the meeting activities by the Danish regional macroeconomic model.

Findings – meetings activities

Number of meetings in 2010: **188,000**

Number of delegates in 2010: **6.9 million**

Total expenditure of meetings activities:

DKK 20.8 billion (app. **euro 2.8 billion**): where

- DKK 11.4 billion spent by meetings organizers
(**54.8%**);
- DKK 9.4 billion spent by delegates
(**45.2%**).

Findings – economic impacts

Meetings activities create full-time equivalent jobs:

- Direct effects: **25,800 jobs**
- Total effects: **38,000 jobs**

Meetings activities generates gross-value added

- Direct effects: **DKK 8,5 billion** (app. euro 1.1 billion)
- Total effects: **DKK 15.3 billion** (app. euro 2.1 billion)

Total governmental revenue:

- **DKK 7.8 billion** (app. euro 1.1 billion)

The venue survey

Meetings activities by the purpose

	No. of meetings	Days of meetings	Average length
In total	187,900	295,700	1.6
Conference/ congress	48,800	84,200	1.7
Trade shows	1,100	1,800	1.6
Courses	95,000	157,200	1.7
Other meetings	42,900	52,600	1.2

Note: The length of meetings is a discrete variable. Hence, the average day is overestimates

Source: Venue Survey from Visit Denmark (2012).

The organizer survey

Average daily meeting cost by the purpose

	Daily costs* (DKK)
Conference/congress	1,220
Trade shows	7,560
Courses	1,070
Other meetings	930

Notes: *Daily cost per delegate.

Source: Organizer Survey from Visit Denmark (2012).

The delegate survey

Average daily spending of participants

(in DKK)	Conference	Trade shows			
	/congress	Visitors	Exhibitors	Courses	Other
Domestic	1,070	310	920	680	1,110
Overnight stay	2,080	870	1,590	1,250	2,260
Day-participants	1,440	628	1,320	830	1,620
Local	780	190	430	230	870
International	1,360	700	1,540	1,090	1,190
Overnight stay	1,890	870	1,590	1,310	1,810
Day-participants	1,090	630	1,320	920	1,080

Source: Delegate Survey from Visit Denmark (2012).

Methodology: the Danish regional macroeconomic model

- LINE model is applied in this project for evaluating the economic and employment impacts of meetings activities;
- The model is based on the **social accounting matrices (SAM)** and on the **input-output general equilibrium framework**;
- The model has built on **a municipality level** – interregional relationship showing **commuting, shopping, trading and tourism flows**;
- The model contains many **economic variables**: production, intermediate consumption, private and public consumption, investment, import and export, etc., as well as the census data, such as population, labour force, employment and taxes, etc;

Results of the economic contribution of meetings activities by 5 regions

(mil. DKK)	Capital	Zealand	South DK	Central J	North J	Denmark
Production	12,643	2,890	7,941	5,385	2,202	31,061
Intermediate consumption	6,803	1,476	3,932	2,556	1,033	15,801
Gross value added	5,840	1,414	4,009	2,829	1,168	15,260
Compensation to the employees	4,013	911	2,789	1,963	803	10,478
Employment (FTE jobs)	12,683	3,609	10,768	7,642	3,186	37,888

Concluding remarks

- We have **one system** for the regional TSA and regional modelling, so that we can make both regional tourism statistics and economic impact analysis;
- Tourist survey data played important role in compiling the regional TSA tables, but the regional production and register data are important sources too;
- Business tourism (incl. MICE) is distinguished from the leisure tourism, which is served better for the marketing function;
- Data quality needs to be further improved;
- We want to exchange the experience with regional TSA development in the other countries and make comparisons.

Thank you!

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