

2011

Tourism effectiveness on economics in the region of Southern Denmark,
2008



This publication is a piece of a greater series of publications with purpose to uncover the tourism in Southern Denmark.

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Tourism effectiveness on economics for Southern Denmark

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Who we are and what we do

There are a lot of different actors and stakeholders connected to the current tourism sector in Southern Denmark. Many of those are connected together – both horizontally and vertically – in a structure that are mostly political decided and determined. A lot of efforts are put into the progress for making tourism better and to enhance the current system.

Syddansk Turisme is one of these actors. Syddansk Turisme occupy three units; *Marketing, Leisure Tourism* and *Business Tourism*. Syddansk Turisme have also some projects with a certain narrow perspective – such as the project in front of you about *destination development*.

Syddansk Turisme is divided into tourist segmentations of the prior defined units, which is:

Leisure Tourism	Kids N' Tweens The Good and Healthy Life Destination Development Experience Academy
Business Tourism	Inspiring Denmark Experience Academy
Marketing	Market actors

Our industry

A new form of tourism is making its way forward, and we are starting to see a new kind of tourism arena in Denmark as well as around the world. We need to focus and position against the future-demanding tourist, who will *have reasons to go* and *go* in the intra-spectra of a product serving both individualism and collectivism. Two very alike contradictions, which only few magically strikes to combine into a great tourism offering. What is common for both the individual-motivated and the collectivist-motivated tourists are that the tourism product should be something that both A) enriches, B) somehow give substances to life and that all along C) creates lifelong memorabilia. There is a demand for strongly differentiated products with valuable content and quality. The vacation most emphasizes meaning, identity and strong values. The more differentiated, the more content-oriented and the more quality-emphasized a product is, the more less price-sensitiveness will properly follow along the product demand. Our branch should be unique and hard to copy elsewhere.

We most not be afraid of using our basic historical features in our region – from H.C. Anderson to beaches at the West Coast – the exact same features that we already have been preaching for decades – as it will give the tourist some points of parity. What is very fundamental is that we provide some reference spots for the tourists, that they can relate to, properly know and properly have an opinion about. We most divide our product offerings into *points of parity* and *points of difference*. And when the tourists are here – we can be radical innovative and provide points of difference. But we have to know our region perfectly and what landscape we are to be manoeuvring in.

Syddansk Turisme proudly present a very solid insight to the Southern Denmark features and landscape – through numbers and qualitative data treatment – all in one: **The tourism effectiveness at the economics for the region of Southern Denmark.**

Preface of report

Tourism is an export industry with national revenues on level with oil- and textile industries. Also is the tourism industry growing – both global, national and local. According to EU, tourism is the primarily growth-creating industry for peripheral areas in Europe. In distinction to many other industries, tourism can be spread across the country, and in some cases the tourism industry even exists better in outback areas of the country than in the main metro poles.

The southern Danish tourists transpose 16.500 millions D.Kr. yearly and indirectly create 20.000 jobs. Tourism is in other words more than sand between your nails and flashing cameras. Tourism is a high billion industry, which creates a lot of jobs and contribute to value generation and tax revenues.

The wish upon this publication is to document the effectiveness of tourism in economics for the region of Southern Denmark. What most likely fewer people know is that Southern Denmark creates most jobs due to tourism out of all regions outside the Capital Area. These jobs and value increases created in Southern Denmark happens to origin from industries that normally aren't characterized in order of tourism industry. This publication does not just include consumption from traditional tourism industries as *sleeping, dining* and *experiencing*. This publication includes also effectiveness from other industries, which create revenue due to tourism as for example detail-, transportation- and phone deliveries.

It is a well documented claim that tourism provide better internal as well as external culture understanding, internationalisation and new nature and culture experiences for the benefit of both tourists as well as citizens of Southern Denmark. With this publication we hope that even more will open their eyes towards the considerable economy in the tourism industry.

This publication is one out of series of analysis that are about to discover the regional offerings and supply, demand and the effectiveness of the tourism on economics in the region of Southern Denmark. These analyzes are developed and compiled by Syddansk Turisme and financed by Syddansk Vækstforum.

Enjoy.

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2. Summery

Tourism comprises an important part of Danish economy and is an essential part of the Southern Denmark economy as well. In respond to that it is crucial for public as well as private decision-makers to get a solid grid on making the right conclusions. Based on this publication, many guiding data fields are put together, and fosters following conclusions;

- The total consumption gained from the tourism industry in the entire Southern Danish **region** is on 16,5 billion D.Kr. (16,500 million D.Kr.), which compiles 21,8% out of the total Danish tourism consumption figures.
- The German market is the biggest foreign market for Southern Denmark with more than double revenue gained here than compare to the entire group of the next three foreign markets all together.
- Both leisure and business tourism plays a big role in the regional tourism for Southern Denmark. Leisure comprises 9,7 billion D.Kr. (59%) and business la bit less with 6,8 billion D.Kr. (41%).
- There will be created 20.824 jobs as consequence from tourism revenues. The Southern Denmark region is the number one region in job creation – beside the Capital area of Denmark.
- The created annual tourism employment in the region is similar to the national average.
- A considerable share of the employment that is created from tourism is going elsewhere to other industries.
- Value added from tourism is covering 9,4 billions D.Kr., which compiles 3,3% out of the total value added GNP I the region.
- Amazing 50% of value added effects from tourism are assigned to other industries.
- The public domain cash in over 6 billion D.Kr. every year due to tax revenues from the tourism industry, whereas 1,250 million D.Kr. goes to municipality tax, 312 million D.Kr. in regional tax and 1,050 million D.Kr. in national tax.

The most important key figures for the economics in Southern Denmark are illustrated below.

Table 1: Summary – economic effects of tourism

	Region of Southern Denmark
Tourism consumption in Southern Denmark	16.467 million D.Kr.
Share of total regional supply	1,6%
Biggest regional markets	
Denmark	11.206 million D.Kr.
Germany	2.920 million D.Kr.
Norway	632 million D.Kr.
Sweden	330 million D.Kr.
Holland	264 million D.Kr.
Business tourism	6.006 million D.Kr. 3%
Leisure tourism	9.647 million D.Kr. 59%
Tourism gross added value in Southern Denmark *	Kr.9.440 million D.Kr.
Share of total regional gross added value	3,3%
Regional tax revenue generated from tourism*	6.006 million D.Kr.
Share of regional total tax revenue	3%
Tourism generated employment/job	20.824 yearly full-time jobs
Share of regional employment	3,4%

* Includes direct, indirect and induced effects

Source: VisitDenmark turismeregnskab, særkørsel 2011

3. Introduction

A well-founded base to build your decision around is important for both public as well as private decision-makers – no matter what level you might be in. When tourism related decisions have to be made, whenever it is concerning marketing, destination development, resource allocation or something fourth, it is important to build your solution around a solid data foundation. A solid foundation can be, among others, information about how tourism contributes to the wealth of a society (tax, employment etc).

This publication describes the economic effect of tourism in the southern region of Denmark. The publication contain following fundamental areas:

- *Tourism consumption* – What is the consumption explicit in the region and its independently municipalities. What is the deviation between industries?
- *Employment* – What is the employment created from tourism a long the region?
- *Gross value added (GVA)* – How is gross valued added effected by the revenues created in tourism?
- *Tax and revenue* – How will tourism effect regional economy?

The publication is build upon recent accessible data. The economic effects from tourism are calculated throughout information and numbers in the 2008 national report - managed and operated by VisitDenmark. The 2008 edition is the newest update and the next update is scheduled for ultimo 2012.

There is considerable amount of uncertainty by using estimates as the ones used in this publication¹. Despite these uncertainties, the procedure has a lot advantages as well. The economic analysis contains first of all the total selection of the different tourism line of trade and not just the typical and well-known pending statistics on *overnight stays* from Danmarks Statistik (The Danish Statistical Association). The method allows us to see the diverted effects of tourism as well, which compiles both employment and sales figures. It is also possible to calculate tax revenue on a local scale as well as on a national scale. This publication should therefore be seen as the most current answer on tourism effectiveness on economy in the region of South Denmark.

¹ Estimates contain figures from at huge source of data collection. Some assumptions are therefore necessary to make along use. See following chapters on *methodology* as well as the *VDK 2011a explanation sheet* to gain a better understanding.

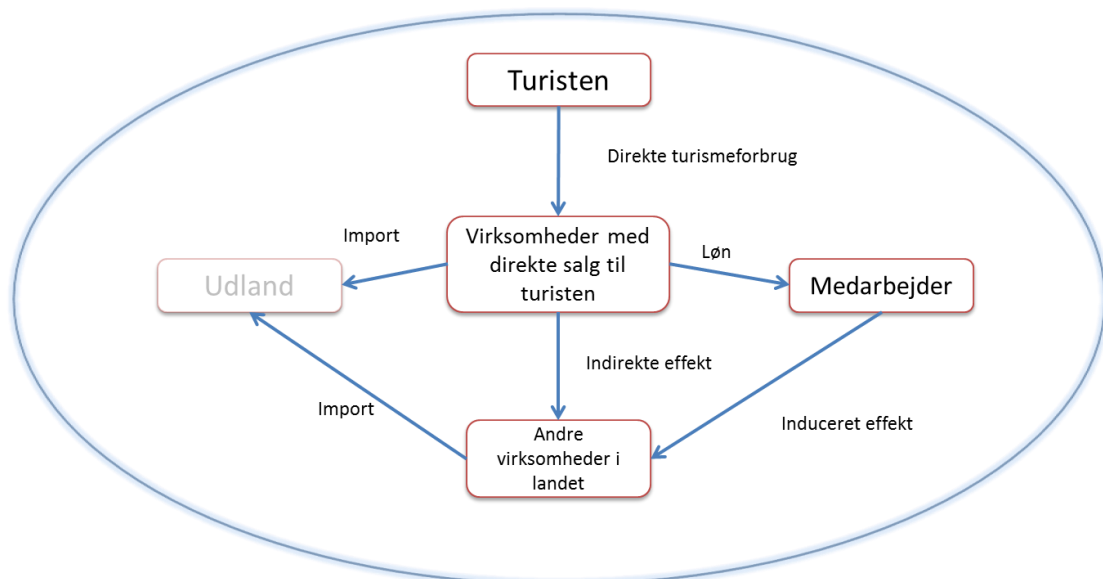
4. Method

In tourism industry it is present and well-known, that tourists use money in a whole lot of industries, especially including the retail industry. Industries that specific appeal to the tourism consumption are also *used* by local inhabitants – and it is almost impossible to separate these groups from each other. This publication is an example of a demand-generated economic analysis where consumption investigations frame the background for the national reports (and the 2008 as well).

The method is called “satellite accounting” and the advantage in this type of method is that results are matched with the official figures from the national report, which means that consumption on hotels for example can’t exceed the total sum anytime.

In Denmark indirect and induced effects are also present in the national report for tourism. This will provide the most accurate and complete screendump of the tourism industry and its effects. Relevant parameters of effect are shown below in figure 1.

Figure 1: Effect flow in tourism industry



Note: “Abroad” is toned down as to illustrate the stream of effects running out of the country and the focus of this publication.

Source: VDK 2011a s 11

Diverted effects in this publication contain both *indirect*, *induced* and *imported* effects. Transport to border of Denmark is not included in the calculation of the consumption.

The companies, that the tourist chooses to spend his money at is the *direct* effect of tourism. These companies have once again consumption at another company (buying raw materials for example), which is called the *indirect* effect. Employees, working at one of these companies, that use some of their salaries in consumption will be denoted as the *induced* effect. Almost all production facilities use imported goods from abroad with will be denoted as import, whereas the reverse situation will be denoted as export.

Underneath are the most relevant notions listed.

Tourism:

Tourism contains all journeys with or without overnight stay, when journeys are placed outside the usual environment whether it is meant for pleasure, leisure or business purpose. Practicalwise, when overnight stays are measured, the overnight stay will be encountered despite the fact that the tourist is placed in its usual environment – here is the fact, that a overnight stay is necessary, the trigger for encountering the trip as tourism. Concerning domestic single-day tourism (where the tourist origin from Denmark) the trip starts and ends at home, but as to denote the trip single-day tourism, there must be a certain part of culture involved in the trip combined with at least 50 km distance to the home OR take at least 3 hours (and due to the origin of the term - maximal one single day – otherwise it wont be *single-day* tourism anymore – just *regular* tourism). Foreign single-day tourism is much more simple to categorize as all trips crossing the border to Denmark will be encountered as foreign single-day tourism as long the trip doesn't last longer than 24 hours.

Tourism consumption:

Tourism consumption contains everything that the tourists use their money on at their vacation in Denmark. This covers also consumption made priorly to the vacation as for example prepaid stuff (e.g. hotel etc.). Expenses for transport to and from the tourist's home and to the Danish border is not included. The tourism consumption is calculate after the so-called satellite method, which means that the sum from the individual industries is put together and matched with the total sum for all industries (distributed from Danmarks Statistik) as to see whether those figures are equally (which they should be).

Commercial/non-commercial overnight suppliers:

The commercial overnight supply spans from hotels, holiday centres, camping spots, rented summer houses, hostels, cruises, bed and breakfasts as well as festivals with potential overnight opportunities. Among the non-commercial overnight type exist visiting friends and family, own or borrowed summer house and single-day travellers.

Diverted effects:

Diverted effects compiles *direct*, *in-direct* and *induced effects* as already written priorly in

this publication. Furthermore, induced effects spans over fields such as employment, gross value added and tax revenue. Direct effects contain first hand contact points – those transactions happening in the very first link. Indirect is in second link.

Intra- and inter-effects:

The total societywise economic effects in a given municipality can be broken down to respectively intra and inter-effects. Intra effects are all the generated value “staying” in the municipality, whereas inter effects are sort of lost to other municipalities. The reference point to whether it is “in-house” or not as determine due to the place, where the individual case/tourist has his overnight stay (further readings at page 15).

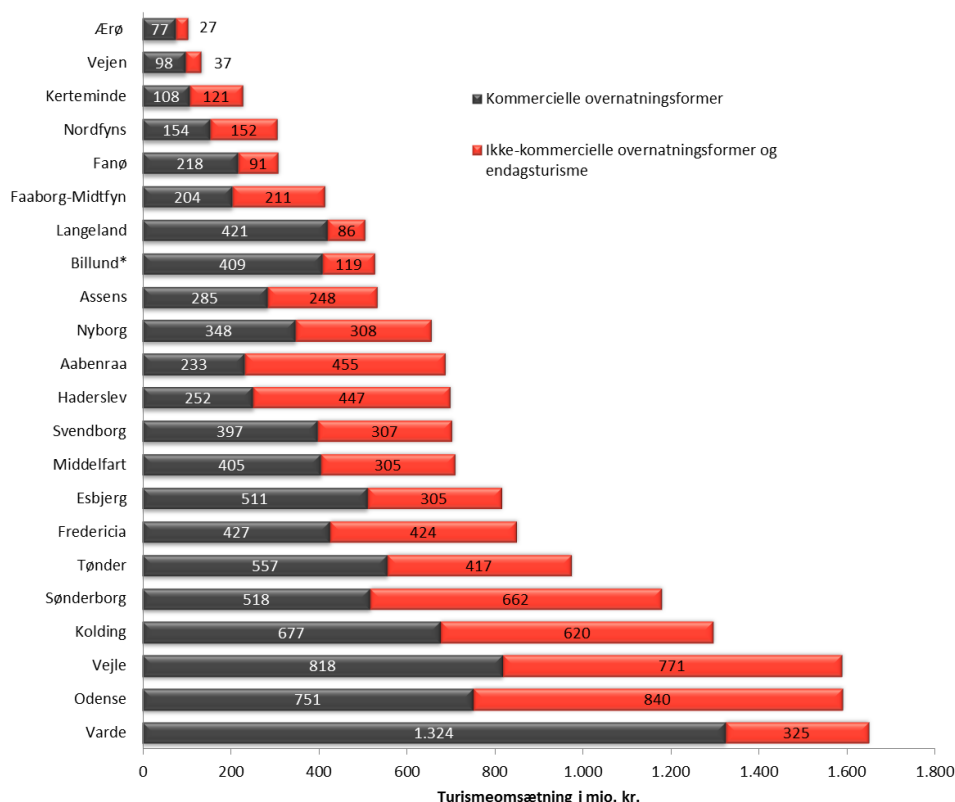
Tourism overnight stay and single-day travellers:

The total number of touristic overnight stay and single-day travelling both as leisure or business are calculate throughout sources, that by VisitDenmark are seen as the entire tourism number for an area. The number from VisitDenmark separates from the registered overnight stays as VisitDenmark upscale their calculations by inviting small units and non-registered units into the total calculation as well. VisitDenmark will in these numbers in all of their calculations so they will match each other.

5. Touristic Consumption

Tourists' entire consumption in the region of Southern Denmark is 16,5 billion D.Kr. and comprises 22% out the total touristic consumption in Denmark. The consumption constitutes 1,6% of the entire supply of goods and services, which is the same amount as the average national index. The 9,2 billion D.Kr. originates from tourists, that make overnight stays at commercial spots, whether 7,2 billion D.Kr. instead originate from non-commercial overnight stays and single-day travels.

Figure 2: Tourism consumption spread upon municipalities and types of overnight stays, 2008, for region of Southern Denmark.



Note: * The data haven't incorporated the latest huge development in Billund, which effects both capacity and overnight stays.

Source: VisitDenmark turismeregnskab, særkørsel 2011

Measured in touristic consumption, the municipality of Varde is the biggest economic provider in the region, nearly followed by the municipality of Odense and Vejle. In respect to Odense, Vejle and the 11 biggest following municipalities, Varde has a large amount of commercial overnight stays. This is especially due to the result of the big supply of summer houses in the area, whereas Vejle and Odense in a greater extend attract single-day travellers as city tourism and because of the many attractions in the areas.

One assumption in the calculation is that tourists' total revenue is placed in-house of the municipality. If a tourist therefore make an overnight stay in another municipality just for one day or place a great amount (or a small amount as well) on attractions outside the municipality, that will be captured in the in-house municipality, where the tourist has his greatest amount of overnight stays. Of course this works visa versa.

Southern Denmark manages 16,5 billion D.Kr., which compiles 21,8% of the total national revenue on the tourism industry. 25% of that consumption is just for commercial overnight stays, 18,8% for single-day tourism and non-commercial tourism. Table 2 below shows that touristic consumption for Southern Denmark and the individually municipalities.

Table 2: Tourism consumption and tourism share divided between municipalities, sorted after the greatest share.

	Commercial type of overnight stay	Non-commercial type of overnight stay or single-day tourism	In total	Entire supply	Tourism share of entire supply
	Million D.Kr.				Percentage
Denmark in total	36.713	38.705	75.418	4.775.603	1,6
Southern Denmark	9.191	7.277	16.467	1.033.437	1,6
Fanø	218	91	309	3.816	8,1
Langeland	421	86	507	11.530	4,4
Varde	1.324	325	1.649	45.201	3,6
Nyborg	348	308	656	20.230	3,2
Middelfart	405	305	710	26.987	2,6
Tønder	557	417	974	41.521	2,3
Sønderborg	518	662	1.180	57.531	2,1
Svendborg	397	307	704	32.857	2,1
Vejle	818	771	1.589	85.686	1,9
Assens	285	248	533	28.693	1,9
Ærø	77	27	104	5.566	1,9
Billund	409	119	528	29.280	1,8
Kolding	677	620	1.297	81.335	1,6
Fredericia	427	424	851	61.670	1,4
Aabenraa	233	455	688	53.970	1,3
Nordfyns	154	152	307	23.916	1,3
Haderslev	252	447	699	53.466	1,3
Odense	751	840	1.590	129.212	1,2
Faaborg-Midtfyn	204	211	415	41.491	1
Kerteminde	108	121	229	21.962	1
Esbjerg	511	305	816	134.141	0,6
Vejen	98	37	135	43.377	0,3

Note: Commercial overnight types: Hotels, camping spots, hostels, holiday centres, marinas, bed and breakfast, cruises and rented summer houses
Source: VisitDenmark turismeregnskab, særkørsel 2011

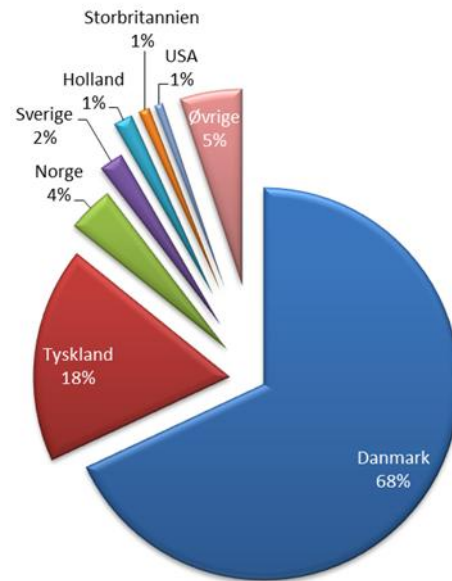
Table 2 is sorted by how big the share of tourism in the individual municipality compiles out

of the total share. The share equals the revenue including tax and duties.²

Fanø and Langeland are definitely those municipalities in Southern Denmark, that are most dependent on the tourism industry, whereas Vejen and Esbjerg only get small revenues from tourism. The uncertainty in the calculation is most present in small municipalities, but it is assumed reasonable, that actually Fanø and Langeland are depending a lot from the tourism industry with our insight knowledge of those two municipalities.

11,2 billions D.Kr. of the total consumption is from Danish tourists (68%), whereas 5,3 billions D.Kr. originate from foreign markets.

Figure 3: Tourist revenue 2008 (percentage) on core markets



Source: VisitDenmark turismeregnskab, særkørsel 2011

Table 3: Tourism revenue 2008 (million D.kr.) per market in the Southern Denmark region.

	Syddanmark
Total	16.467
Denmark	11.206
Germany	2.920
Norway	632
Sweden	330
Holland	264
Great Britain	154
USA	117
France	88
Italy	70
Switzerland	63
Polen	44
Belgium and Luxembourg	35
Finland	35
Spain	30
Canada	11
Austria	7
Japan	5
Other European	258
Other countries	115
Other America	44
Other Eastern Europe	33
Other Asia	6

² The supply compiles Danish production plus import and therefore represent everything used production of the product and the product itself, private as well as public consumption, investments and export activities. Not GDP though, which is the Danish production minus consumption used to facilitate product, which is of less value.

Source: Visitdenmark RTSA 2008

The foreign tourists are essential in a national economic perspective, as their consumption in Denmark can be comparable with exporting³, which means that the export revenue are 5,3 billion D.Kr. only originated from the tourism industry.

As figure 3 shows, Germany is the way most important market in Southern Denmark with alone 56% market share (out of the foreign total share). Afterwards follow markets such as Norway, Sweden, Holland and Great Britain, which in total only represent 26% of the rest. Germany is also in that perspective a great contributor.

Table 4 shows how the touristic consumption is placed along commercial and non-commercial overnight stays. The division on national level is also listed just to give a comparative insight.

Table 4: Tourism revenue 2008 (million D.Kr.) per type of overnight stay

	Region of Southern Denmark		Denmark
	Million D.Kr.	Pct.	Pct.
Total	16.467		
Commercial in total:	9.191	56%	48%
Hotel – leisure	859	5%	7%
Hotel – business	4.006	24%	21%
Camping spot	1.118	7%	1%
Hostel	97	1%	5%
Rented summer house	2.342	14%	1%
Holiday centre	214	1%	10%
Festival	286	2%	1%
Marina	252	2%	1%
Bed and breakfast	18	0%	0%
Cruise	0	0%	1%
Non-commercial in total:	7.277	44%	52%
Own summer house	849	5%	8%
Borrowed summer house	256	2%	2%
Family/friends	2.087	13%	15%
Single-day travellers – leisure	1.271	8%	14%
Single-day travellers – business	2.814	17%	13%

³ The same works the opposite around, where Danish tourists' travels outside Denmark contribute to Danish import as well as foreign export.

Share of commercial tourism	56%
Share of leisure tourism	59%
Share of business tourism	41%

Source: VisitDenmark turismeregnskab, særkørsel 2011

As seen above, the region of Southern Denmark has a greater extend of commercial overnight stays than the national average. This is caused due to a higher amount of business tourism as well as a great amount of rented out summer houses.

Among the non-commercial overnight stays, it is especially the single-day travellers, that contribute to a lower rate than the national average. In absolute terms it is worth noticing that business related stays contribute the most to the accumulated tourism consumption.

Furthermore, table 4 shows that the distribution between leisure and business tourism. Leisure tourism reveals 9,7 billion D.Kr. (59%) and business tourism contribute with 6,8 billion D.Kr. (41%).

The consumption from tourism can also be calculated on different kind of business sectors and product types. Below in table 5 are listed, how the consumption plays out on different product types. There are used three overall distinctions: *Tourism-characteristic products*, *tourism-connected products* and *non-tourism-connected products*.

Table 5: Tourism revenues for 2008 (in million D.Kr.) spread along product types.

	Southern Denmark	
	Million D.Kr.	Pct.
Total	16.467	
Tourism-characteristic products	11.347	69%
<i>From this:</i>		
Overnight stay	3.772	23%
Restaurant	1.380	8%
Transport	3.913	24%
Travel service	2.119	13%
Attractions and sights	163	1%
Tourism-connected products	3.226	20%
<i>From this:</i>		
Victuals, tips and tobacco	1.368	8%
Gasoline and fuel	929	6%
Other retail industry	929	6%
Non-tourism-connected products	1.894	11%

Source: VisitDenmark turismeregnskab, særkørsel 2011

The share of revenue, that is placed in tourism-characteristic products is balancing the national average on 68%, where 23% are used on overnight stay and 24% on transportation. It is interesting to see that 69% of the consumption goes to typically tourism branches and industries, whereas 31% is placed in other industries (*Tourism-connected products and non-tourism-connected products*).

6. Employment

The revenue that is rooted in the industry of tourism provides a lot of employment. There is created jobs along businesses such as overnight stay suppliers and the retail affiliated as well as in businesses that are not identified as tourism-connected industries. The employment is not only created because the tourist buys a product, even the indirect and the induced effects create further jobs.

The indirect jobs are those that are created because the tourism industry has to buy goods of their own either as raw material or something else. The induced effects originate, when employees get their salaries and spend it, which creates jobs the places where they spend it. The calculation is in yearly full-time job, which means that all hours employees are working are calculated into a year perspective, where number of days and number of hours that normally characterize a full-time position, are used as the denominator. This calculation takes seasonal work and part-time jobs into consideration and calculation as well. A much more true picture is hereby calculated.

Table 6: Number of jobs created due to tourism effects, Danish regions, 2008

	Tourism created yearly full-time jobs	Share of touristic jobs created	Share of touristic jobs out of the entire job creation in Denmark
	Yearly full-time jobs	pct.	pct.
Denmark	102.000	100	3,5
Southern Denmark	21.000	20	3,4
Capital area	44.000	43	4,5
Sealand	11.000	11	3,4
Middle Jutland	15.000	15	2,2
Northern Jutland	11.000	11	3,6

Note: Inkl. Direkte, indirekte og inducerede effekter. Opgjort i fuldtidsbeskæftigede
Source: VDK (2011b)

As revealed in table 6, Southern Denmark is the region in Denmark, where most yearly full-time jobs are created due to tourism beside the Capital area of Denmark. Although is the share of touristic job creation 0,1 percent-point under the national average on 3,5. The high number of touristic job creation in the Capital area is due to the high number of hotel overnight stays, which created most jobs per spend overnight stay as many instances of people are involved in the hotel product. Hotels is the number one job contributor out of all types of overnight stay businesses.

Table 7 shows the employment effect originated from tourism in the individual municipality in the region of Southern Denmark.

Table 7: Tourism effects on employment (yearly full-time job) per municipality

	Tourism created yearly full-time jobs	Total employment in respective municipality	Share of touristic jobs out of the entire job creation in Denmark
	(a)	(b)	(a/b)
Denmark	101.531	2.901.692	3,5
Region of Southern Denmark	20.824	605.125	3,4
Odense	2.391	103.228	2,3
Vejle	2.049	58.386	3,5
Varde	1.777	22.862	7,8
Kolding	1.724	54.238	3,2
Sønderborg	1.473	38.302	3,8
Fredericia	1.239	29.479	4,2
Middelfart	1.000	17.464	5,7
Svendborg	994	25.138	4,0
Tønder	971	19.092	5,1
Esbjerg	959	59.316	1,6
Nyborg	930	12.052	7,7
Billund	907	18.147	5,0
Aabenraa	786	30.662	2,6
Haderslev	707	27.059	2,6
Assens	645	16.485	3,9
Langeland	629	5.569	11,3
Faaborg-Midtfyn	458	21.430	2,1
Fanø	348	1.068	32,6
Nordfyns	332	10.827	3,1
Kerteminde	267	11.823	2,3
Vejen	139	19.886	0,7
Ærø	97	2.611	3,7

Source: VisitDenmark turismeregnskab, særkørsel 2011

Odense is the number one municipality in the Southern Denmark area that creates the largest amount of yearly full-time jobs (2.391). It does not surprise though as Odense is the biggest municipality in the region and has the biggest overall employment for all industries as well. If you look at the percentage of the contribution, Odense is only contributing with 2,3% touristic jobs out of the total employment generated in Odense.

In table 7 above are municipalities with touristic shares at or above 5% market with bold colour. Fanø has the biggest touristic share of all time with 32,6%, which is partly due to the fact, that Fanø is an island. Langeland (island), Varde, Nyborg, Middelfart, Tønder and Billund is above average as well. It is worth noticing, that Billund today has a lot greater amount of tourism than indicated in these numbers, as Billund has got a new attraction in addition to LEGOLAND® - LaLandia®. The reason to point out Billund among 22 municipalities

is that, the amount contributed nowadays is around 130% higher than stated in 2008. The entire employment effect in a municipality can be broken down into intra effects and inter effects.

- Intra-effects compile the employment effects of tourism that stays in-house in the municipality, where the respective tourist has its direct consumption or do overnight stays.
- Inter-effects compile all consumption that is used while staying in another municipality.

Inter-effects originate typically, when you are about to discover indirect and induced effects. Companies, that sells directly to tourists, buys raw material and thereby create employment as well. It is very interesting to see, how many of these jobs are create in the same municipality or in another one (or even outside Southern Denmark). Below in table 8 is listed the intra-effect for the 22 municipalities in Southern Denmark.

Table 8: Tourism effects on employment (Intra effect) per municipality

	Intra-effect:	
	Share of employment from own tourism revenues	Intra-created yearly full-time jobs
Denmark	Pct. 100	101.531
Southern Denmark	n.a.	n.a.
Odense	44	1.052
Vejle	68	1.402
Varde	70	1.247
Kolding	44	750
Sønderborg	53	787
Fredericia	59	725
Middelfart	55	549
Svendborg	44	439
Tønder	67	653
Esbjerg	43	415
Nyborg	67	624
Billund	45	405
Aabenraa	62	486
Haderslev	76	540
Assens	67	434
Langeland	52	328
Faaborg-Midtfyn	58	265
Fanø	49	171
Nordfyns	88	292
Kerteminde	59	158
Vejen	43	60
Ærø	77	74

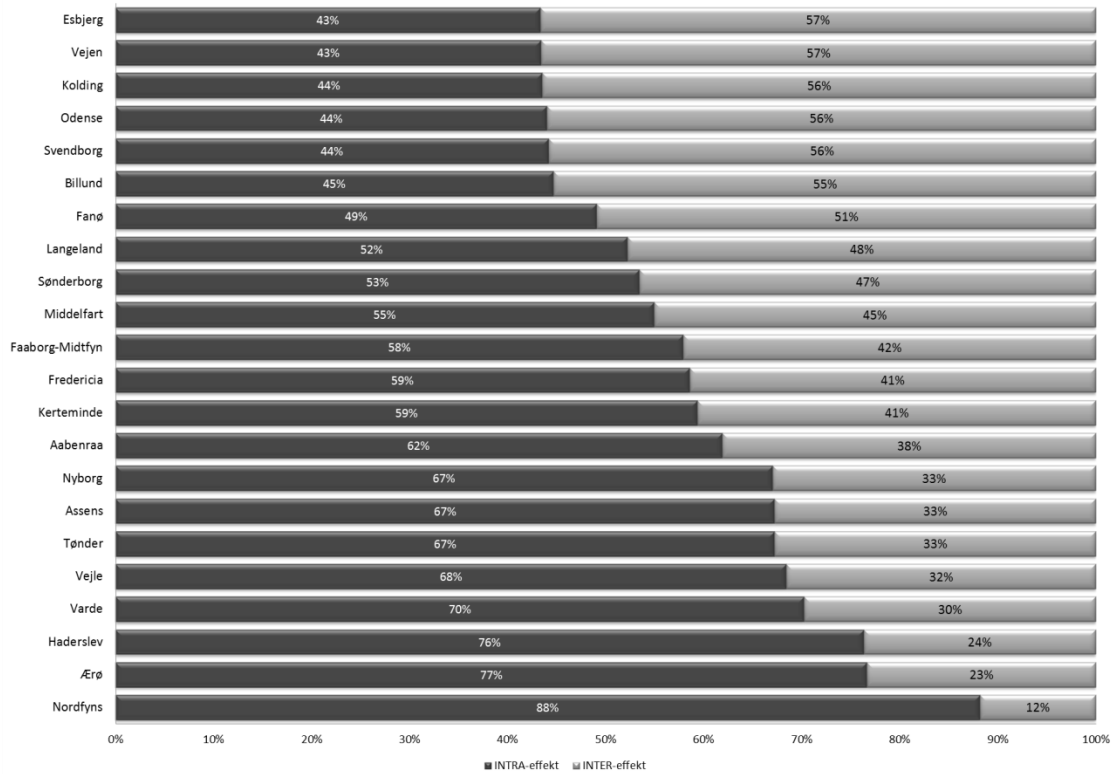
Source: VisitDenmark turismeregnskab, særkørsel 2011

When we look at Denmark in total, the 101.531 created jobs are per definition all entitled as intra-created jobs. This is due to the satellite report, that only measures the effects inside the borders of Denmark. From a local perspective it is a relevant parameter, whether the

effort pays off in your own community or elsewhere.

There is a bit of uncertainties connected to the above-mentioned results, as it is an assumption in the methodology, that tourists normally place their consumption where they also live (overnight stay). The uncertainty rises along with the smaller size the municipality are as the behind-calculate factors and weights are generally founded and work better the higher the number n is. Although there is some clear patterns, which are showed underneath.

Figure 4: Relationship between intra- and inter-effects on employment, per municipality



Source: Relationship between intra- and inter-effects on employment, per municipality

As you can see above Esbjerg and Vejen have a lot of inter-effects and therefore loses revenues into other municipalities. Nordfyns is in the opposite end and marks itself as intra-effect beholder with only 12% going outside the municipality (inter-effect).

Table 9 underneath shows how the tourism created employment lays out on different kinds of businesses.

Table 9: Tourism diverted effects on employment (yearly full time jobs) per type of business

	Southern Denmark
Total	20.824
Tourism-characteristic businesses	12.065
Among these:	
Overnight stay businesses	6.140
Restaurants and pubs businesses	2.416
Transport businesses	1.333
Travel service business and information centres	1.564
Attraction businesses	613
Tourism-connected businesses (retail etc.)	3.492
Non-tourism-connected businesses (all other businesses)	5.266

Source: VisitDenmark turismeregnskab, særkørsel 2011

As it shows above, a bit above half of the tourism created yearly full-time employment is placed in tourism-characteristic businesses. Especially overnight stay businesses create employment – as well as restaurants and pubs.

The tourism-connected businesses such as retail industry, generate 17% of the employment effect, whereas 25% of the touristic generated employment originate from non-tourism-connected businesses. In other words; a quarter goes to businesses that haven't connection to tourism directly. This indicates that a decrease in tourism has effects far away from typically businesses as well.

7. Gross Value Added (GVA)

Gross Value Added (GVA) is an objective that calculates how much value that is created, when you deduct the costs of creating the value⁴. There is not an unequivocal connection between tourism consumption in Southern Denmark and the GVA, as GVA also captures some value in the diverted effects from other regions as well. This is highlighted underneath, where it is possible to see how big the GVA in a municipality that originate from own revenues.

Table 10: Total diverted effects of tourism, gross value added (GVA) per municipality

	Tourism created GVA	Entire GVA	Touristic share of entire GVA	INTRA-effect: Share of GVA (a) from own tourism revenues	INTRA- created GVA
	(Million D.Kr.) (a)	(Million D.Kr.) (b)	(a/b)	(pct.)	(Million D.Kr.)
Denmark (total)	46.826	1.481.103	3,2	100	46.826
Southern Denmark	9.440	288.935	3,3	n.a.	n.a.
Varde	997	11.046	9,0	56	561
Odense	972	46.882	2,1	36	351
Vejle	911	26.030	3,5	37	333
Kolding	738	24.339	3,0	82	607
Sønderborg	680	18.248	3,7	30	207
Tønder	528	9.065	5,8	53	278
Fredericia	461	17.536	2,6	61	279
Svendborg	445	11.440	3,9	52	232
Middelfart	416	8.131	5,1	63	260
Aabenraa	404	16.722	2,4	79	319
Esbjerg	392	30.517	1,3	73	285
Nyborg	380	5.419	7,0	38	145
Billund	336	9.549	3,5	69	233
Haderslev	326	11.715	2,8	50	164
Langeland	298	2.531	11,8	73	219
Assens	290	7.982	3,6	77	224
Faaborg-Midtfyn	221	10.161	2,2	73	161
Fanø	208	555	37,5	80	166
Nordfyns	166	5.233	3,2	27	44
Kerteminde	137	5.459	2,5	49	67
Vejen	69	9.159	0,8	40	28
Ærø	64	1.218	5,2	47	30

Source: VisitDenmark turismeregnskab, særkørsel 2011

Out of the total tourism consumption on 16,5 billion D.Kr. is 9,4 billion D.Kr. getting back in touristic GVA⁵, which correspond to 3,3% of the entire GVA produced in Southern Denmark.

Varde contributes mostly to the total GVA, when you take a look on the absolute figures (and not in relation to size), where 56% originates from own tourism consumption (intra-effect). On Fanø (island) is the share 37,5% out of the total GVA, and 80% from own tourism

⁴The touristic created GVA is calculated from the satellite report from VisitDenmark. GVA is the same as GNP just without taxes and duties (basic prices).

⁵ GVA compiles value from other regions and does not have a 1:1 between revenue and value.

consumption. Kolding secures the most of its revenue in-house (intra-effect) with 82%. Table 11 shows the GVA divided into businesses. What can be seen is that half of the value is diverted, around 13% is in tourism-connected businesses and that 37% is on non-connected tourism businesses.

	Southern Denmark
Total	9.440
Tourism-characteristic businesses	4.694
Among these:	
Overnight stay businesses	1.561
Restaurants and pubs businesses	545
Transport businesses	1.059
Travel service business and information centres	1.218
Attraction businesses	311
Tourism-connected businesses (retail etc.)	1.273
Non-tourism-connected businesses (all other businesses)	3.473
Share of tourism-characteristic businesses in diverted GVA (pct.)	50%

Source: VisitDenmark turismeregnskab, særkørsel 2011

Half of all value created due to tourism is originated in businesses outside the *tourism-characteristic businesses*, and these businesses will surely feel a respective increase or decrease as well as the direct businesses.

8. Taxes and duties

Tourism in region of Southern Denmark creates public revenues on 6 billion D.Kr. every year. A special tax called “Moms” is the biggest post, and tax on goods plus company tax compiles generally a bit over half the revenue.

Table 12: Tourism diverted effects on revenues (million D.kr.) per type of tax	Southern Denmark
Total tax and duties	6.006
Personal taxes in total	2.657
Among these:	
Municipality taxes*	1.250
Church taxes	46
County taxes and Regional taxes	312
National taxes	1.050
Goods- and Company taxes	3.349
Among these:	
Taxes on goods / Excise duties	431
Moms / Value added tax (vat)	2.516
Company taxes	402
Tourism diverted revenue's share of total revenue generated in the region (pct.)	3 %

* Municipality tax equals to own generated municipality revenue from tourism (INTRA+INTER), not including company taxes
Source: VisitDenmark turismeregnskab, særkørsel 2011

Tourism diverted revenues compiles 3% out of the total revenue. Compared to national average it is very low as tourism diverted revenues on the national level compiles 4%. Most of tax and duties goes to national level through personal tax and value added tax (vat). Moms is clearly the biggest contributor to revenue generating. Compared to markets near Denmark the moms is way different in Denmark, where for example Germany has a much lower level and has private actors have better competitiveness in that perspective (Horesta 2011, page 26).

9. Reference list

H

Horesta (2011): Normstalsanalysen 2009/2010, Horesta, udgivet 2011.

V

VDK (2011a): Turismens økonomiske betydning i Danmark 2008, VisitDenmark, indhentet januar 2011.

VDK (2011b) Turismen i Region Sjælland, VisitDenmark, indhentet januar 2011.

Appendix A: Tourism consumption

Tourism revenues 2008 (million D.Kr.) per municipality	Commercial type of overnight stay	Non-commercial type of overnight stay and single-day tourism	Million D.Kr.			Tourism share of entire supply in Country/Region/Municipality
			Total	Country/Region/Municipality	pct.	
Denmark in total	36.713	38.705	75.418	4.775.603	1,6	
Southern Denmark	9.191	7.277	16.467	1.033.437	1,6	
Varde	1.324	325	1.649	45.201	3,6	
Odense	751	840	1.590	129.212	1,2	
Vejle	818	771	1.589	85.686	1,9	
Kolding	677	620	1.297	81.335	1,6	
Sønderborg	518	662	1.180	57.531	2,1	
Tønder	557	417	974	41.521	2,3	
Fredericia	427	424	851	61.670	1,4	
Esbjerg	511	305	816	134.141	0,6	
Middelfart	405	305	710	26.987	2,6	
Svendborg	397	307	704	32.857	2,1	
Haderslev	252	447	699	53.466	1,3	
Aabenraa	233	455	688	53.970	1,3	
Nyborg	348	308	656	20.230	3,2	
Assens	285	248	533	28.693	1,9	
Billund	409	119	528	29.280	1,8	
Langeland	421	86	507	11.530	4,4	
Faaborg-Midtfyn	204	211	415	41.491	1,0	
Fanø	218	91	309	3.816	8,1	
Nordfyns	154	152	307	23.916	1,3	
Kerteminde	108	121	229	21.962	1,0	
Vejen	98	37	135	43.377	0,3	
Ærø per 1 st of January 2006	77	27	104	5.566	1,9	

Kilde: Visitdenmark RTSA 2008

Tourism revenues 2008 (Million D.Kr.) Market	Aabenraa	2006	Vejle	Vejen	Varde	Tønder	Søndersborg	Svendborg	Odense	Nyborg	Nordfyns	Middelfart	Langeland	Kolding	Kerteminde	Haderslev	Faaborg-Midtfyn	Fredericia	Fanø	Esbjerg	Billund	Assens	Denmark	Total
	688	104	1.589	135	1.649	974	1.180	704	1.590	656	306	710	507	1.297	229	699	415	851	309	816	528	533	16.467	
Denmark	353	69	1.251	108	657	434	646	569	1.202	583	206	584	376	965	171	368	305	720	143	703	357	437	11.206	
Germany	253	20	73	6	827	446	406	35	53	15	35	37	87	92	20	249	29	27	153	28	11	20	2.920	
Norway	40	4	47	8	84	37	55	19	66	13	21	22	14	48	9	31	19	15	7	17	41	15	632	
Sweden	7	1	61	5	15	11	17	6	25	4	3	7	2	59	2	13	4	24	1	12	48	3	330	
Holland	7	1	29	2	40	16	16	6	14	5	10	16	10	27	5	9	7	7	3	14	15	6	264	
Great Britain	6	1	17	0	3	4	7	9	24	4	3	7	2	14	2	5	5	8	0	20	7	4	154	
USA	1	2	9	0	1	1	2	10	34	6	4	5	2	9	3	1	8	4	0	1	6	6	117	
France	2	1	3	0	0	2	3	8	26	4	4	5	2	4	3	2	7	2	0	2	2	5	88	
Italy	1	0	22	0	1	1	0	1	5	1	1	1	0	18	0	1	1	11	0	2	4	0	70	
Schwizerland	0	1	5	0	3	2	1	5	16	3	3	3	1	4	2	1	4	2	0	1	2	3	63	
Polen	0	1	9	1	1	1	0	2	6	1	2	2	1	5	1	3	2	2	0	1	3	1	44	
Belgium and Luxembourg	0	0	11	0	1	1	1	1	2	0	0	0	0	9	0	1	0	5	0	1	2	0	35	
Finland	0	0	8	1	1	1	0	0	2	1	0	0	0	10	0	0	0	1	0	2	7	0	35	
Spain	0	0	6	1	0	0	1	1	4	0	0	0	0	5	0	0	0	3	0	1	5	3	30	
Canada	0	0	3	0	0	0	0	0	0	0	0	0	0	2	0	0	0	3	0	0	1	0	11	
Austria	0	0	0	0	2	1	0	0	1	0	0	0	0	1	0	0	0	0	0	1	0	0	7	
Japan	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	1	0	5	
Other European	5	2	20	0	3	5	9	21	80	11	10	13	5	10	8	5	17	8	0	4	7	14	258	
Other countries	11	1	12	0	8	10	13	4	9	2	2	3	3	10	2	9	3	4	2	2	1	2	115	

Family/friends	2,087	85	0	0	130	105	115	48	227	29	74	59	64	383	120	156	84	0	0	270	14	13
Single-day travellers – leisure	1,271	6	47	10	31	9	216	4	50	3	9	5	9	49	14	278	195	22	12	62	2	234
Single-day travellers – business	2,814	138	244	107	257	63	47	20	277	0	184	6	213	407	150	132	48	50	21	386	2	61
Share of commercial tourism revenues (pct.)	56	53	63	77	50	49	36	47	52	83	57	50	53	47	56	44	57	80	73	51	74	34
Share of leisure tourism (pct.)	59	40	26	48	27	64	83	80	48	100	39	94	25	38	49	73	88	92	58	41	96	78

Kilde: Visitdenmark RTSA 2008

Tourism revenues 2008 (Million D.Kr.) Product type	Denmark	Assens	Billund	Esbjerg	Fanø	Fredericia	Faaborg-Midtfyn	Haderslev	Kerteminde	Kolding	Langeland	Midelfart	Nordfyns	Nyborg	Odense	Svendborg	Sønderborg	Tønder	Varde	Vejen	Vejle	2006	Aabenraa
Total	16,467	533	528	816	309	851	415	699	229	1,297	507	710	306	656	1,590	704	1,180	974	1,649	135	1,589	104	688
Tourism-characteristic products	11,347	424	443	705	121	727	275	389	127	968	191	565	138	572	1,304	540	712	519	800	100	1,270	52	404
Among these:																							
Overnight stay	3,772	160	173	292	13	276	91	99	40	344	30	210	37	226	481	194	195	176	46	451	12	105	105
Restaurant	1,380	38	64	51	28	53	41	78	24	102	43	49	33	36	128	56	114	97	130	12	116	16	74
Transport	3,913	176	143	304	12	326	90	82	31	367	16	240	18	264	530	222	197	94	123	30	542	6	98
Travel service	2,119	46	60	53	66	62	49	126	29	137	77	61	47	41	150	62	200	198	362	11	141	17	123
Attractions	163	4	4	6	2	10	5	4	3	17	26	5	4	5	15	6	6	6	9	1	20	1	4
Tourism-connected products	3,226	74	63	79	109	67	98	236	73	177	151	99	117	59	191	118	333	286	442	26	178	38	210
Among these:																							
F&B + tobacco	1,368	31	12	22	55	23	44	97	37	76	67	45	61	26	70	47	139	128	213	8	70	14	82
Gas and gasoline	929	19	22	31	25	23	24	74	18	49	53	26	29	16	56	32	102	82	104	10	55	8	68

Other retail	929	23	29	25	30	21	30	65	18	53	32	28	26	17	65	38	92	77	124	8	53	16	60
Non-tourism-connected products	1.894	35	21	32	78	56	42	74	29	152	165	46	52	25	95	46	134	169	407	8	141	14	74
Share of tourism-characteristic products in direct tourism revenues (pct.)	69	80	84	86	39	85	66	56	55	75	38	80	45	87	82	77	60	53	49	74	80	50	59

Source: Visit-Denmark RTSA 2008

Appendix B: Diverted effects

Tourism diverted effect on employment (yearly full-time) per municipality	a. Tourism created employment	b. Total employment in municipality	a./b. Tourism share of total employment per municipality (pct.)	INTRA-effect:	
				Share of employment (a.) from own tourism revenue (pct.)	INTRA- created yearly full- time
Denmark	101.531	2.901.692	3,5	100	101.531
Southern Denmark	20.824	605.125	3,4	n.a.	n.a.
Odense	2.391	103.228	2,3	44	1.052
Vejle	2.049	58.386	3,5	68	1.402
Varde	1.777	22.862	7,8	70	1.247
Kolding	1.724	54.238	3,2	44	750
Sønderborg	1.473	38.302	3,8	53	787
Fredericia	1.239	29.479	4,2	59	725
Middelfart	1.000	17.464	5,7	55	549
Svendborg	994	25.138	4,0	44	439
Tønder	971	19.092	5,1	67	653
Esbjerg	959	59.316	1,6	43	415
Nyborg	930	12.052	7,7	67	624
Billund	907	18.147	5,0	45	405
Aabenraa	786	30.662	2,6	62	486
Haderslev	707	27.059	2,6	76	540
Assens	645	16.485	3,9	67	434
Langeland	629	5.569	11,3	52	328
Faaborg-Midtfyn	458	21.430	2,1	58	265
Fanø	348	1.068	32,6	49	171
Nordfyns	332	10.827	3,1	88	292
Kerteminde	267	11.823	2,3	59	158
Vejen	139	19.886	0,7	43	60
Ærø 1 st of January 2006	97	2.611	3,7	77	74

Source: VisitDenmark RTSA/LINE 2008

Total tourism diverted GVA per municipality	a. Tourism created GVA	b. Total GVA in municipality	a./b. Touristic share of total GVA	INTRA-effect: Share of GVA (a.) from own tourism revenue (pct.)	INTRA-created GVA
Denmark	46.826	1.481.103	3,2	100	46.826
Southern Denmark	9.440	288.935	3,3	n.a.	n.a.
Varde	997	11.046	9,0	56	561
Odense	972	46.882	2,1	36	351
Vejle	911	26.030	3,5	37	333
Kolding	738	24.339	3,0	82	607
Sønderborg	680	18.248	3,7	30	207
Tønder	528	9.065	5,8	53	278
Fredericia	461	17.536	2,6	61	279
Svendborg	445	11.440	3,9	52	232
Middelfart	416	8.131	5,1	63	260
Aabenraa	404	16.722	2,4	79	319
Esbjerg	392	30.517	1,3	73	285
Nyborg	380	5.419	7,0	38	145
Billund	336	9.549	3,5	69	233
Haderslev	326	11.715	2,8	50	164
Langeland	298	2.531	11,8	73	219
Assens	290	7.982	3,6	77	224
Faaborg-Midtfyn	221	10.161	2,2	73	161
Fanø	208	555	37,5	80	166
Nordfyns	166	5.233	3,2	27	44
Kerteminde	137	5.459	2,5	49	67
Vejen	69	9.159	0,8	40	28
Ærø 1 st of January 2006	64	1.218	5,2	47	30

Source: VisitDenmark RTSA/LINE 2008

Tourism diverted effects on GVA (million D.Kr.) per type of business	Southern Denmark	Assens	Billund	Esbjerg	Fanø	Fredericia	Faaborg-Midtfyn	Haderslev	Kerteminde	Kolding	Langeland	Middelfart	Nordfyns	Nyborg	Odense	Svendborg	Sønderborg	Tønder	Varde	Vejen	Vejle	Ærø 1st of January 2006	Aabenraa
Total	9.440	290	336	392	208	461	221	326	137	738	298	416	166	380	972	445	680	528	997	69	911	64	404
Tourism-characteristic-businesses	4.694	152	186	238	66	286	113	163	56	380	123	214	70	224	538	229	291	224	358	41	523	24	194
Among these:																							
Overnight stay	1.561	64	69	117	10	105	39	38	16	126	15	74	18	105	231	74	75	51	79	20	188	4	44
Restaurants and pubs	545	15	24	16	13	22	16	28	10	42	16	20	12	15	53	25	44	35	50	4	50	6	27
Transport	1.059	38	50	56	7	105	22	20	10	98	11	65	11	66	132	62	53	24	40	9	137	3	37

Travel service	1.218	26	33	39	32	37	28	70	15	80	37	45	23	28	91	55	105	104	169	6	110	8	77
Attractions	311	8	9	10	4	17	7	7	5	33	44	11	6	8	31	14	15	10	21	2	37	2	9
Tourism-connected-businesses (retail etc.)	1.273	39	48	32	36	41	31	47	29	89	45	59	29	43	131	70	123	78	130	6	92	15	60
Non-tourism-connected-businesses (all other)	3.473	100	103	122	106	134	77	115	51	270	130	143	67	113	303	145	265	226	509	23	296	25	150
Share of tourism-characteristic-businesses in diverted GVA (pct.)	50	52	55	61	32	62	51	50	41	51	41	52	42	59	55	52	43	42	36	59	57	37	48

Kilde: Visitdenmark RTSA/LINE
2008

	Aabenraa	111	52	2	18	39	174	41	112	20	54	4
	Ærø 1 st of January 2006	17	8	0	2	7	27	7	19	2	37	7
	Veje	258	120	5	29	105	276	-5	236	45	35	4
	Vejen	49	10	0	3	8	27	2	22	3	45	1
	Varde	658	244	117	30	92	414	110	248	56	38	11
	Tønder	367	135	64	19	50	232	63	151	18	45	8
	Sønderborg	466	183	89	23	68	282	63	188	32	40	5
	Svendborg	270	128	62	18	45	142	11	114	17	48	4
	Odense	555	283	135	41	102	272	-7	239	39	46	3
	Nyborg	205	104	52	12	38	101	-9	95	15	37	6
	Nordfyns	128	45	22	4	18	83	23	53	7	28	4
	Middelfart	258	127	59	14	51	131	5	109	17	37	6
	Langeland	214	73	38	7	28	140	47	83	10	30	14
	Kolding	444	210	98	24	84	233	7	193	33	38	4
	Kerteminde	92	35	18	2	14	57	12	39	6	18	3
	Haderslev	259	93	41	10	40	167	42	109	15	37	4
	Fraeborg-Midtfyn	145	61	30	7	23	84	10	66	8	36	3
	Fredericia	311	198	70	13	113	112	-14	114	12	30	4
	Fanø	128	44	22	3	17	84	26	50	8	26	28
	Esbjerg	238	116	55	18	42	122	-5	114	13	51	2
	Billund	183	88	44	8	34	95	3	83	10	29	5
	Assens	175	82	41	7	32	93	-1	79	15	28	4
	Southern Denmark	6.006	2.657	1.250	312	1.050	3.349	431	2.516	402	n.a.	3
Total tax and duties												
Personal taxes												
Among these:												
Municipality taxes*												
Church taxes												
County tax -/ Regional taxes												
National taxes												
Tax on goods and company taxes												
Among these:												
Tax on goods / excise duties												
Moms/ Value added tax (VAT)												
Company taxes												
Share of tourism diverted municipality taxes from INTRA-effect (pct.)												
Tourism diverted revenue's share of total revenue created in municipality (pct.)												

* Municipality tax reflect the own generated revenue in the municipality (INTRA+INTER), not included company tax

Source: VisitDenmark RTSA/LINE 2008