

CASE
STUDY



Fáilte Ireland
National Tourism Development Authority

**FOOD TOURISM
COPENHAGEN**

**Draft in
Development**

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SECTION ONE

INTRODUCTION AND OVERVIEW

1.1 INTRODUCTION AND OVERVIEW

Copenhagen is one of the most important centres of modern design in Europe in addition to being recognised as a destination that has re-invented how tourism is managed and developed. The city has come a long way since the late 1980's when it was viewed as a city in decay, industries were closing down and the city was close to bankruptcy. It attracted very few international visitors with little investment and development in the city. However, in 1992 the city came under State administration and began planning for the European Cultural Capital 1996. The State invested heavily in infrastructure resulting in the city being completely re-invented.

It was Copenhagen's desire to re-invent tourism which captured the world's imagination. It was provoked to re-think tourism in the city as a result of much publicised concerns about over tourism and its impact on the quality of life of its residents in addition to the experience for visitors in other large urban centres. As a result, Wonderful Copenhagen published a bold, new plan for 2020 titled "The end of Tourism as we know it", the idea of localhood.

Wonderful Copenhagen places people at the centre of its vision and imagines that the destination's future will be co-created by residents, industry and visitors. By declaring localhood for everyone, Wonderful Copenhagen encourages its destination to think of its visitors as temporary residents instead of tourists. A radical shift moved the focus from marketing and promoting to others to a new type of promotion around the shared sense of localhood. The approach is designed to invite visitors to explore the destinations and neighbourhoods.

It features Copenhagen's new nesting box for entrepreneurs in global street food, Paper Island, a street food circus housed in a former paper making factory near Christiania. The concept was developed by an organic farmer that combines gastronomy featuring over 50 chefs from 17 different countries side by side with contemporary culture, design and craft.

Copenhagen is now a modern metropolis with a great appeal for young urban travellers around the world. It hosts a broad variety of world class restaurants, hotels and internationally oriented attractions. The rest of Denmark hosts a tourism more based on nature, cold water tourism and rented second homes - summer houses - which constitutes most of the overnight capacity.

For the last 20 years, there has been a great difference between the two parts of the Danish tourism industry, differing in target groups, daily consumption and growth. Basically, Copenhagen has been the centre of growth and internationalisation whereas the rest of the country has been dependent on well known near markets and product that has developed less. An exception is the Danish west coast, which has had great success attracting German tourists also outside the high season.

Covid-19 has altered the landscape completely however. The Danish government indirectly chose to shut down Copenhagen by demanding that all stays should be at least six bed nights. The summer houses on the other hand, had a great appeal to Danish, German and Norwegian travellers in 2020, which in several parts of the country led to their best season ever. This will probably mean that by the end of 2020, Copenhagen will be down by 80-85% in turnover and several parts of provincial Denmark are reported to show an increase of 15-20% compared to 2019.

The need for innovation has therefore been very present in Copenhagen, whereas most of the country went back to a normal summer after the spring shutdown. High season outside Copenhagen is usually quite short, so Covid-19 has had a limited effect (but as said, with some effect for the west coast, due to autumn shutdown). There are a few good cases of innovation outside Copenhagen that will be mentioned here, but Copenhagen is the main focus.

Denmark shut down more or less completely in March 2020. In June most of the country - except Copenhagen - opened up again with only few restrictions. This autumn however, assemblies are restricted to ten persons, masks must be worn in restaurants and shops, and cafes, restaurants and bars must close down at 10 pm. This has brought back the spring crisis.

Since 1994, Wonderful Copenhagen has been the destination management organisation for Copenhagen and surroundings. Wonderful Copenhagen had moved on to a next-level tourism, focusing on management, sustainability and liveability, rather than marketing. It is a networking organisation, which has had great success in creating a strong modern brand, attracting cruise ships and congresses and being the driver in developing strong brands for the city.

Being well consolidated, Wonderful Copenhagen is a natural lead in reshaping the tourism of the city. In August 2020, the organisation launched a massive development project called Restore Restaurants focusing on innovation, sharing knowledge and accelerating business. The project is strongly supported by business chambers, government, restaurants and the municipality. The first steps in the project were taken in the autumn and this is the first joint venture to help out the food industry in the city.

Up until now, innovation has taken place in the businesses themselves. Wonderful Copenhagen will try to elevate best practice to a more general level.

When it comes to the chambers of commerce, they have taken on the role of lobbying for help packages, relaxing restrictions and being hotline for businesses in need.





SECTION TWO

PRE-COVID19

2.1 DESTINATION TOURISM STRATEGY – MARKETS AND PRODUCT FOCUS

Copenhagen presented the strategy “Localhood for everyone” in 2017. Under the vision of localhood, residents and travellers co-create the tourism destination and shape its development to make Copenhagen a better place to live for all.

By declaring “localhood for everyone”, Wonderful Copenhagen encouraged the destination to think of the visitors as temporary residents, instead of as tourists.

Residents are part of the community, and they contribute to it. The tourism industry can also help visitors add value to the community, instead of asking permanent residents to exchange their quality of life for money.

There was a main focus on markets with the highest business potential, including segments of long-term loyalty potential and markets of high average spending or with large-size meeting potential. This meant attracting international flights to Copenhagen Airport and focusing on overseas guests, such as the Asian market.

Product-wise, the focus was on experiences sought by locals as well – such as local cuisine.

SPECIFIC FOOD TOURISM STRATEGY

There has not been the development of a specific Food Tourism Strategy in Denmark. However, back in 2004 a group of Scandinavian chefs introduced the manifesto “New Nordic Cuisine”, which focused on re-inventing the traditional Nordic kitchen and using local produce. In some form, the manifesto has been incorporated in most tourism strategies in the later years, meaning that local food, Scandinavian tradition and innovation has been at the core of the food and restaurant scene. Danish chefs have developed a strong brand, including Noma (a two-Michelin-Star restaurant

run by chef René Redzepi), and strong ties have been established between local producers and Copenhagen restaurants.

Prior to the Covid-19 pandemic, public/private investment in the development of the food tourism experience is best exemplified through the Copenhagen Cooking & Food Festival launched by Wonderful Copenhagen.

Since 2017, it has been driven by FOOD (Food Organisation of Denmark) which is a partnership between municipalities, companies and organisations around Copenhagen.

FOOD also has the lead on a project called “The creative and competent food scene” - referred to as “The Future Food Scene”. The project is a strategic collaboration created to support and strengthen the food development in Greater Copenhagen.

The Future Food Scene is a project targeting ambitious and talented companies working with food. The purpose is to help the best food companies to develop their business and create more growth.

The project has a variety of activities targeting small and medium-sized businesses - from the manufacturer of chocolate or soft drinks to hotels, restaurants and street food actors.

BRAND PROPOSITION

Design and architecture: From old cobbled streets to defining furniture designs, experimental public spaces and globally renowned modern architecture, Greater Copenhagen presents a unique experience of liveable design.

Gastronomy: The birthplace of New Nordic cuisine, Copenhagen is one the

world's true gastronomic hot-spots and creative playgrounds ranging from Noma to local rooftop earth-to-table flavours.

Sustainability: From drinkable tap water to a strong local biking culture, popular public harbour pools and a political ambition to become the world's first co2 neutral city in the world by 2025. In Copenhagen - and in the entire country - sustainability is not just something Danes say: it's something they live and share.

A pocket-sized fairy tale: A modern royal family and one of the world's oldest monarchies, stunning castles and a proud fairytale tradition keep the history and cultural heritage of Greater Copenhagen forever alive.

Tolerance and diversity: With open street parties for everyone, the locals of Copenhagen are proud of the safe, open and tolerant approach to love and to people of all shapes and sizes.

FOOD CLUSTERS IN THE DESTINATION

Food Nation (<https://foodnationdenmark.com/>) is an initiative under the Danish Food Cluster. The Danish Food Cluster covers everything from primary and processed food production, food technology and

ingredients industry, know-how and research to the wide range of products available to consumers all over the world. Food Nation Visitor Centres in Copenhagen and Aarhus are showrooms where delegations can dive into the strongholds of the whole value chain of the Danish food cluster. Here, visitors will get an interactive experience carried out by a combination of guided storytelling and self-exploration.

The Visitor Centres are primarily aimed at inspiring and informing international delegations about Denmark as a food nation before they move onto on-site visits. The showrooms guide the visitor through the history of Danish food and agriculture production and provides up-to-date knowledge on the Danish food cluster's products and solutions.

The key to the success of the clusters from a commercial point of view i.e. tourism impact includes:

- A strong brand and understanding the potential of New Nordic Cuisine.
- Strong partnerships between state, municipalities, organisations and producers.
- Focus on the stronghold of Denmark as an agricultural country with potential for local produce.



FOOD COLLABORATIONS, NEWWORKING AND ADDED VALUE EXPERIENCES

Collaborative work within the destination is primarily undertaken by FOOD. Examples include the Copenhagen Beer Week, Copenhagen Cooking and Engagefood. www.thefoodproject.dk/.

Torvehallerne provides an example for the promotion of food. It is a food hall in central Copenhagen, which sells a broad variety of food and at the same time is a venue for food events. (torvehallernekbh.dk/).

Another venue of note is Reffen (reffen.dk/en/werkstatt-167/), an international street food venue and cultural hotspot.

In relation to collaborations in attractions, Tivoli hosts a food hall occupied by local restaurants that can also be found outside the amusement park.

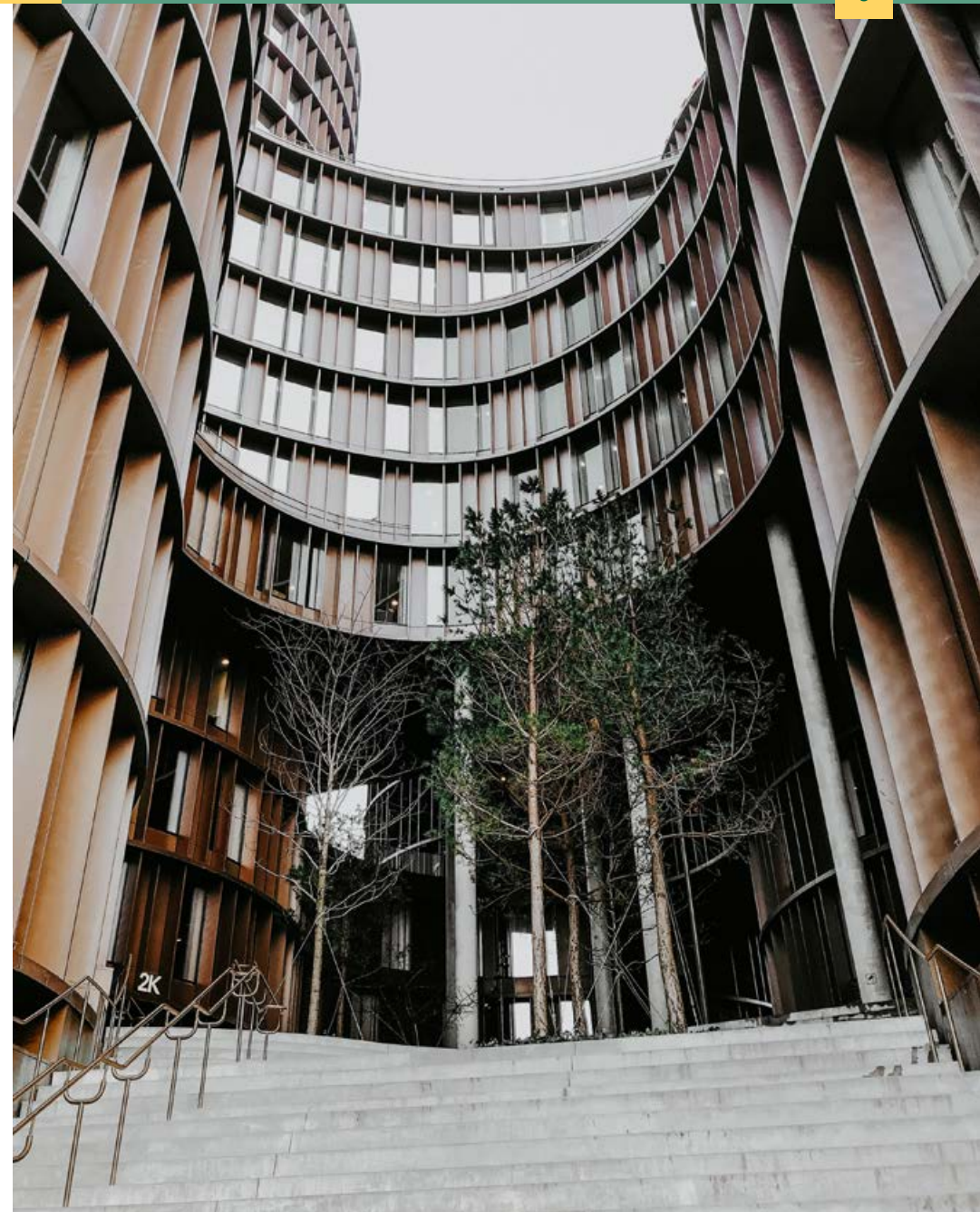
ROLE OF FOOD IN THE VISITOR EXPERIENCE

Restaurants and eating out is a core part of the Copenhagen experience. The brand values mentioned above nicely covers the way guests behave. Copenhagen hosts a broad variety of food experiences much sought by guests.

MARKETING COMMUNICATIONS & DIGITAL PRESENCE

Food is an essential part of Wonderful Copenhagen's website and SoMe-presence. www.visitcopenhagen.com/copenhagen/eat-drink/restaurant-guides leads its customers to a universe of eating. This works in combination with a dedicated work to invite and host foodie influencers, SoMe-videos and testimonials from local Copenhageners promoting their favourite places.

NOMA and new Nordic Cuisine are central parts of the differentiation of the destination through food. Denmark won Bocuse d'or in 2019.





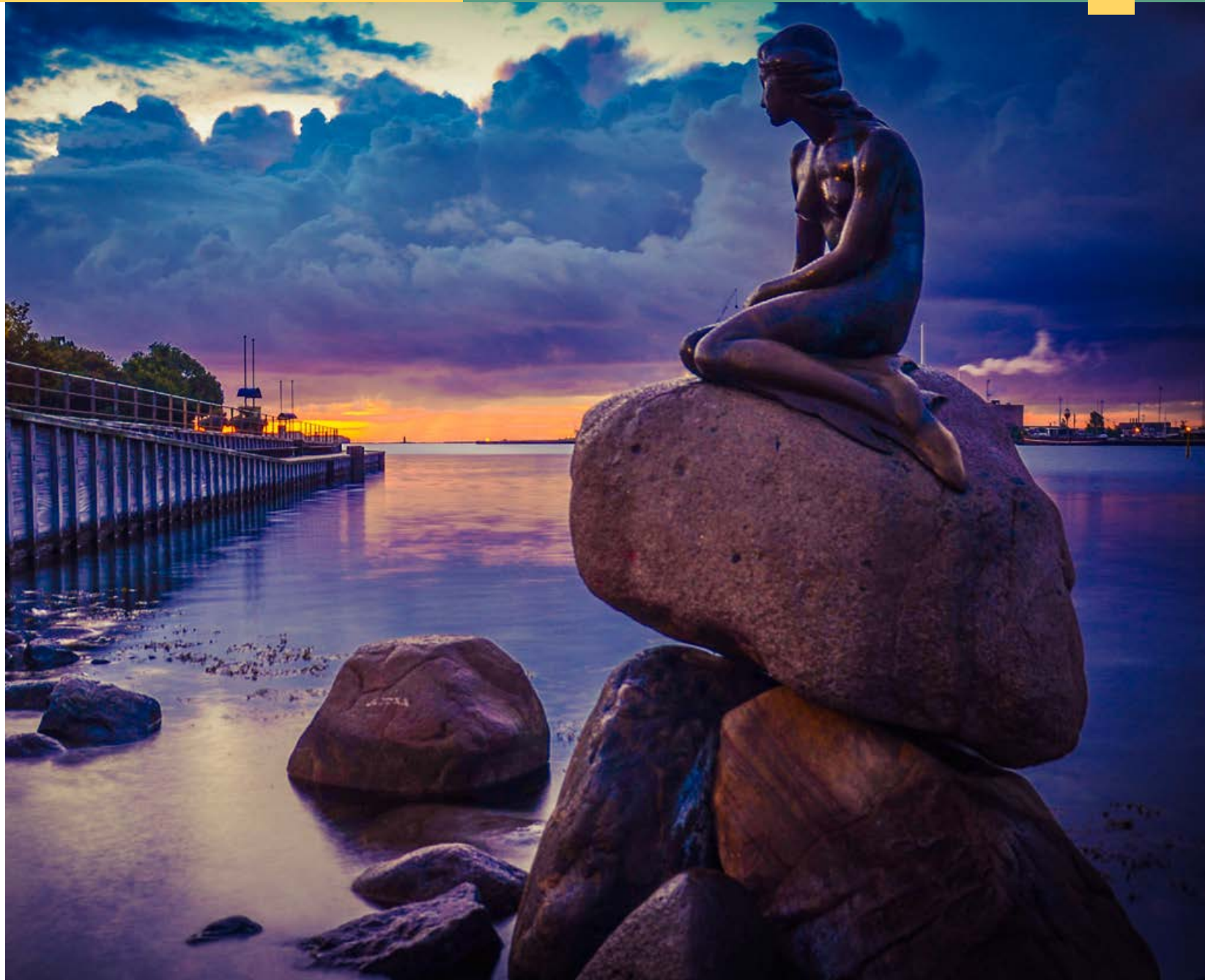
SECTION THREE

CURRENT SITUATION
DURING COVID-19

3.1 DESTINATION AND INDUSTRY RESPONSE

The Danish government quickly responded to the lockdown of the country on March 11th, 2020. All restaurants therefore could receive compensation for their losses and for covering wage expenses. Most of these packages however ran out during summer 2020.

Under the hashtag “Brug byen – den har brug for dig” (use your city – it needs you), Wonderful Copenhagen launched a campaign targeting the inhabitants of Copenhagen, urging them to support local restaurants. Content can be found here: www.wonderfulcopenhagen.dk/wonderful-copenhagen/kickstart-toolkit/koebenhavnerkampagne.



3.2 BUSINESS SUPPORTS AVAILABLE

In the public sector, Fødevarestyrelsen (the Danish Veterinary and Food Administration) oversees all information regarding rules, laws and official recommendations. (www.foedevarestyrelsen.dk/english/Lexicon/Pages/Information-about-COVID-19-for-cafes-and-restaurants.aspx).

Wonderful Copenhagen supports via toolkits mentioned below, and the national association of Hotels, Restaurants and Cafés (HORESTA) has launched a hotline, webpage (www.horesta.dk/din-virksomhed/corona/) and a “Safe to visit”-concept, that helps set up a safe environment.



3.3 ROLE OF LOCAL GOVERNMENT AND INDUSTRY GROUPS

As mentioned previously, lobbying has been the core work of industry groups. The “Safe to Visit” concept providing the best example of industry groups and local government’s role.



3.4 NEW INCENTIVES DEVELOPED LOCALLY

Local guides and businesses such as Copenhagen Food Tours <https://foodtours.eu/> have turned their focus on the domestic market – food experiences have shown to be a way to increase the value of guided tours and making them relevant for Copenhagen residents.

PUBLIC SPACE AND PLACEMAKING INNOVATION

The municipality of Copenhagen opened up for the use of public space allowing restaurants to use outdoor space like pavements and open spaces for free. The restaurant Meyers actually put up greenhouse along the harbour front: <https://meyers.dk/nyheder/nu-aabner-vores-to-drivhusrestauranter/>

VALUE FOR MONEY PACKAGES AND PROMOTION

A rule of a minimum of six bed night stays made it close to impossible for Copenhagen to attract guests in the season of 2020. Value for Money offerings has been predominantly developed by hotel chains, whereas Wonderful Copenhagen and others have actually urged customers to pay full price.



3.5 CHANGING/ EMERGING DOMESTIC CONSUMER HABITS AROUND FOOD IN DESTINATION

Wonderful Copenhagen has seen a great willingness to support “the place on the corner”. Copenhageners generally have been very keen on preserving their own neighbourhood and supporting the special places, that create quality of life. Consequently, local food has also become increasingly popular.

Another observation is, that places promoting safety (spacious or divided rooms) have generally done well. It appears franchise concepts and high street tourism minded restaurants have had a harder time. Takeaway services have become even more popular, and services like Just Eat and Wolt have become extremely successful.



3.6 USE OF GUIDELINES / TOOLKITS DEVELOPED TO SUPPORT THE FOOD INDUSTRY

A kickstart toolkit to support the industry was developed by Wonderful Copenhagen.

www.wonderfulcopenhagen.dk/wonderful-copenhagen/kickstart-toolkit/koebenhavnerkampagne.





SECTION FOUR

KEY LEARNINGS

4.1 KEY LEARNINGS

The top five learnings to highlight in the context of the destination approach to how the destination and businesses have adapted are:

- Increased loyalty from inhabitants.
- Go local!
- Making guests feel safe.
- Getting the food out of the restaurant and into homes, businesses and the city.
- Be relevant and flexible when it comes to opening hours, where food is served and who are the target market.



4.2 DESTINATION BEST PRACTICE TOURISM / HOSPITALITY EXAMPLES

Bar22: Upper class supermarket "Irma" just launched this initiative. 11 small Danish producers of alcohol are part of a package that allows people to drink on after 22 - hence the name. Each time a customer buys on of the bottles, Irma support with 22% in order to keep breweries, distilleries and the like in business.

Bekkers kaffebar: This small local coffee shop provides it's loyal customers with the opportunity of sponsoring a table. The customer gets his or her own name on the table and are served free coffee every day, including coffee meetings.

Meyers: The Meyers restaurants have featured greenhouse with tables for four persons as part of their outdoor service.

Herslev Bryghus: This micro brewery used it's strong SoMe-presence to urge customers to come visit their stock sale and bring boxes of beer back home. From their barn door, they actually sell more than they ever did via distributors - despite of the fact that they are placed far out in the countryside.

Jensens Bøfhus: Jensens is a budget steakhouse restaurant that has existed in Denmark for years, and who were already experiencing difficulties before Covid-19 hit. However, Jensens have since succeeded in selling sauces, spare ribs and the like in their own brand in supermarkets across the country - offering back the "restaurant experience".

Barkastellet: This brand new initiative offers companies their own tailor fit show featuring Danish comedians who broadcast from a mobile studio at the company they are invited by. The company gets a live YouTube show combined with a menu of quality wine and food. The employees can then meet up in small teams or have the package delivered at home - having a safe experience "together apart".



