

Services sector and the information society

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Structure of the services sector

Services sector continues to grow

The services sector comprises a number of different businesses with one thing in common: the production of services. These businesses include the wholesale and retail trade, hotels and restaurants, transport, telecommunication and postal services, financial services and business services, comprising ICT services, research and development, auditing and book-keeping, cleaning, leasing of machinery and equipment, temporary employment agencies, etc.

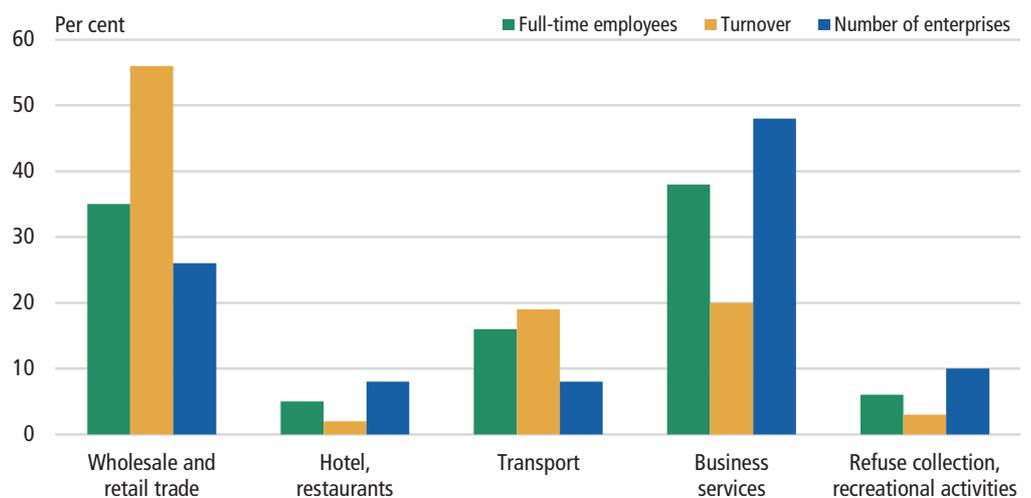
The services sector has experienced a 20 per cent increase in employment during the period 1992-1999, followed by a growth of 22 per cent from 1999 to 2008. In comparison, the number of persons employed in manufacturing declined by 3 per cent from 1992-1999. From 1999 to 2008 the number declined by 15 per cent.

Wholesale and retail trade account for the highest turnover and number of employees

The structure of the private services sector is illustrated in figure 1. In 2008, the greatest number of persons employed was found within business services which accounted for 250,000 full-time employees. Next was the wholesale and retail trade with 335,000 persons employed.

In 2008, the wholesale and retail trade accounted for the greatest part of the services sector's overall turnover with 56 per cent, followed by transport which generated 20 per cent, and business services with 19 per cent. Business services accounted for 48 per cent, or nearly half, of the total number of business enterprises within the services sector. Wholesale and retail trade accounted for 27 per cent.

Figure 1 Employment, turnover and number of enterprises in the services sector. 2009



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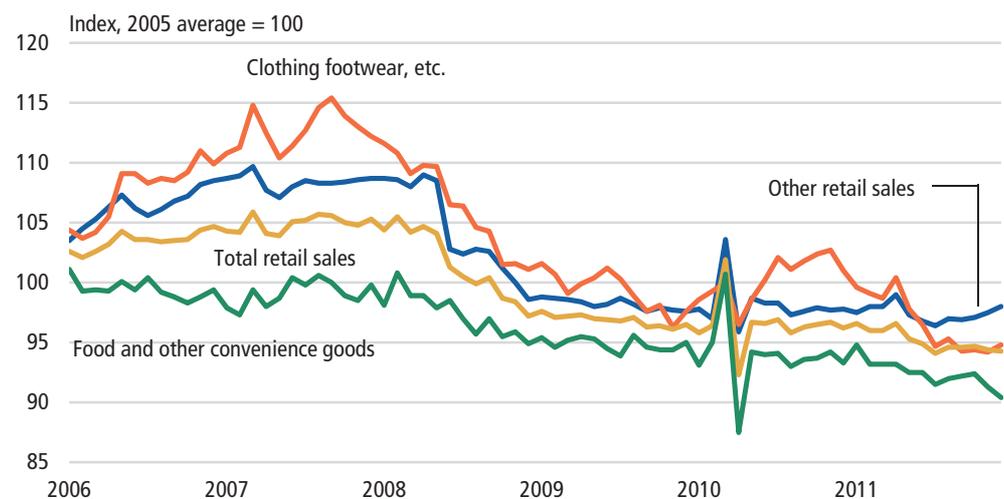
Retail trade**Retail sales in 2011 with continuing even trend**

Retail sales were steady in 2009 and 2010. Following the dramatic drop of 2008, the trend of 2009 and 2010 was relatively flat, and this trend continued in 2011, though with a new smaller drop in the middle of the year. The index ended in December 2011 two pct. lower than the level of December 2010, with the drop primarily connected to the months between April and July.

Retail sales are divided into three categories: *Food and other everyday commodities, clothing etc.*, and *other consumer goods* (e.g. equipment for accommodation and leisure). *Food and other everyday commodities* and *other consumer goods* each represent around 45 pct. of total retail sales. *Clothing, etc.* represents the remaining 10 pct.

Comparing the total retail sales of 2011 with 2010 yields a total drop by 1.4 pct. The sales of *food and other everyday commodities* dropped by 1.5 pct., while *clothing etc.* dropped by 2.7 pct. In the category of *other consumer goods* the sales of 2011 were 0.7 pct. lower than in 2010.

Figure 2 Seasonally adjusted volume index for retail sales



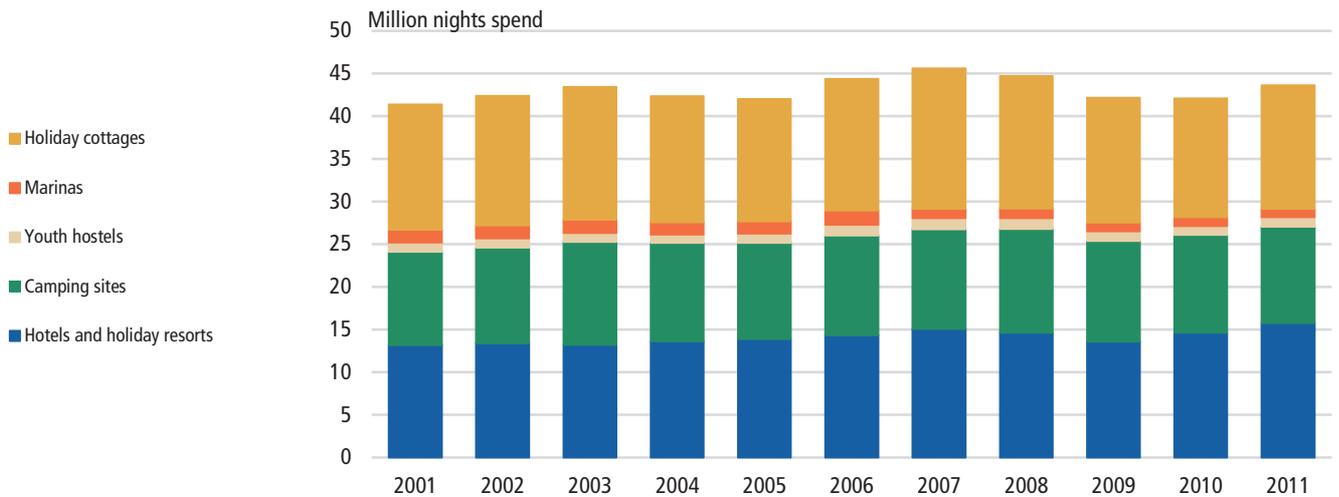
www.statbank.dk/deta21x

3

Tourism**A rise in number of nights spent in 2011**

In 2011, the total number of nights spent in hotels etc., camping sites, hostels, marinas and holiday cottages was 43.6 million. This is an increase of 1.5 million or 4 per cent more nights spent compared to the previous year.

Hotels etc. experienced an 8 per cent increase, whereas camping sites had a 1 per cent decrease. Hostels went up 4 per cent, and Danish Marinas had 7 per cent fewer overnight stays. Holiday cottages leased by Danish rental agencies increased 4 per cent compared to the year before.

Figure 3 Overnight stays by type


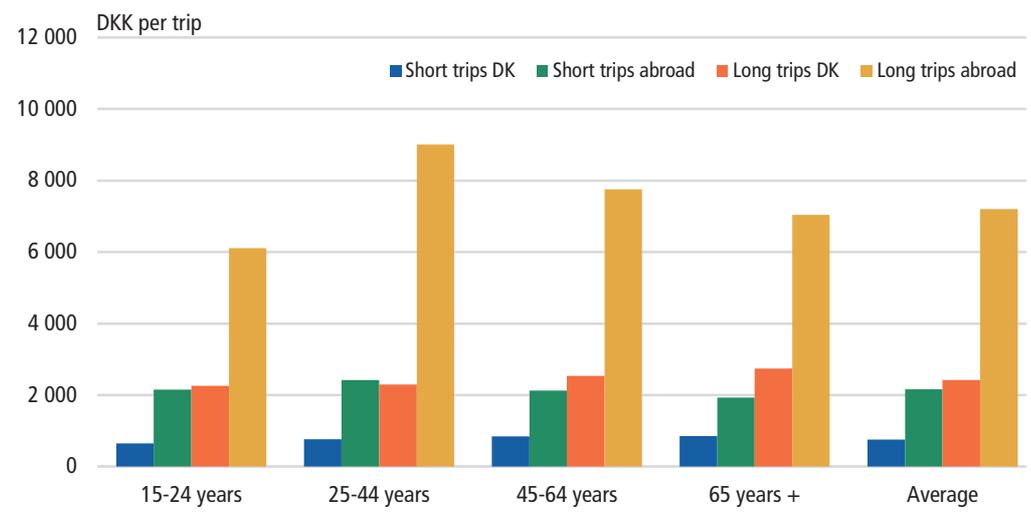
* The statistics for holiday cottages 2011 is preliminary.

Note: Data is not comparable for marinas between 2006 and 2007 due to a change in crew size.

www.statbank.dk/turist

Danes on holiday and business trips

In 2010, Spain was the most popular place for Danes to go on a holiday abroad with a share of 13 per cent of all Danish holidays with at least four overnights stays. Planes were the preferred means of transportation for travelling abroad, as 59 per cent of the holiday trips were by plane. The Danes preferred the car on three out of four holiday trips in Denmark. For 46 per cent of the trips in Denmark, the type of accommodation was family/friends, 23 per cent were in own holiday dwellings, and 13 per cent were in rented holiday dwellings. Camping was also a popular way of going on holiday in Denmark with 11 per cent of all trips. The most popular type of accommodation abroad was hotels with 51 per cent, while 20 per cent stayed with family/friends.

Figure 4 Danish expenditure on holidays. 2010


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The information society

About the information society

An analysis of the information society can be made partly via the supply side in the form of enterprises and employment in the ICT sector and partly via the demand side in the form of the use of information technology by enterprises, the public sector and by individuals.

The ICT sector

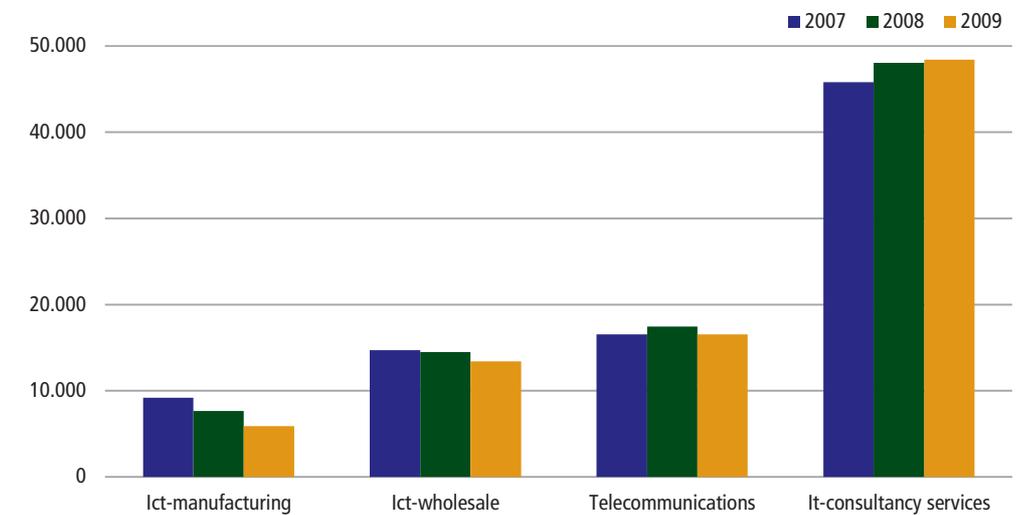
The ICT sector comprises enterprises that produce products and services within electronics, ICT, computer software, telecommunications, and other areas primarily based on information technologies.

The ICT sector can be divided into ICT manufacturing, ICT wholesale, telecommunications, and ICT consultancy services.

Fall in employment in ICT manufacturing

In 2009, the Danish ICT sector employed a total of 84,300 full-time employees, which is minor decrease of 2 per cent compared to 2007. However there was a fall in ICT manufacturing of 36 pct. and an increase of 6 pct. In ICT services, consultants, etc. Out of total employment in ICT manufacturing, 57 per cent was employed in ICT services, 20 per cent in telecommunications, 16 per cent in ICT wholesale and 7 pct. in ICT manufacturing.

Figure 5 Full-time employees in the ICT sector

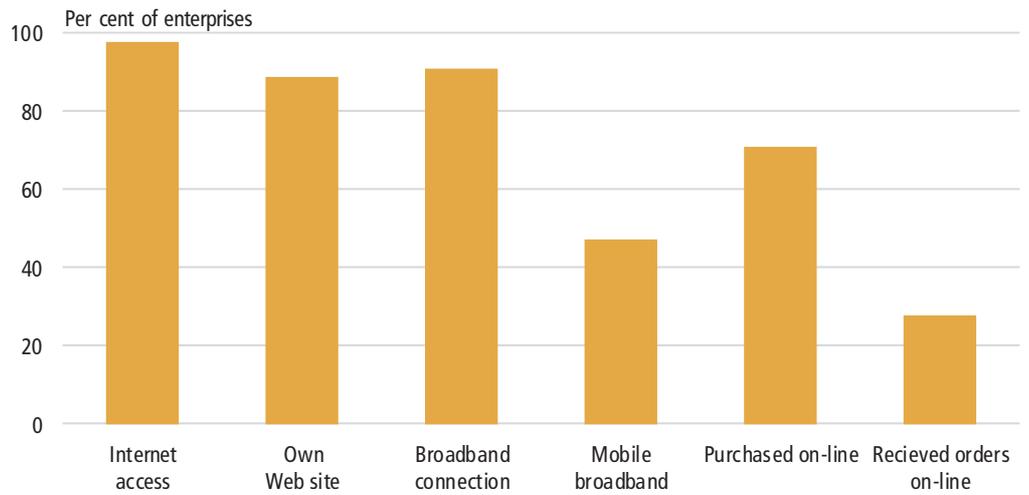


Use of ICT by enterprises

At the beginning of 2011, nearly all enterprises had access to the Internet and almost nine out of ten enterprises had their own website. Nine out of ten enterprises also had a broadband connection to the Internet (i.e. ADSL or another wire-based connection).

Seven out of ten enterprises purchased on-line in 2010. Almost 3 out of 10 enterprises received orders on-line in 2010.

Figure 6 Use of ICT by enterprises. 2011



Note 1: Based on data reported by more than 4,000 enterprises with ten or more persons employed.

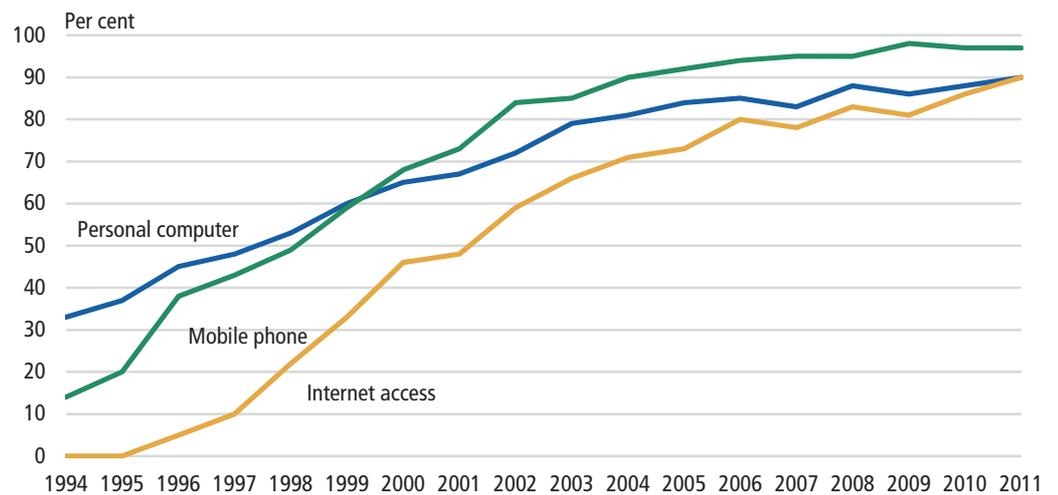
Note 2: A broadband connection comprises ADSL and similar connections or another cable-based Internet connection.

www.statbank.dk/vita

Danes own more and more ICT goods

An increasing number of Danish families have personal computers, access to the Internet and mobile phones. Since 2000, penetration of mobile phones has passed penetration of PC's. In 2011, 97 per cent of Danish families had a mobile phone, compared to 68 per cent in 2000. In 2011, 90 per cent of families had access to a computer at home, compared to 60 per cent in 1999.

Figure 7 Families' access to ICT goods



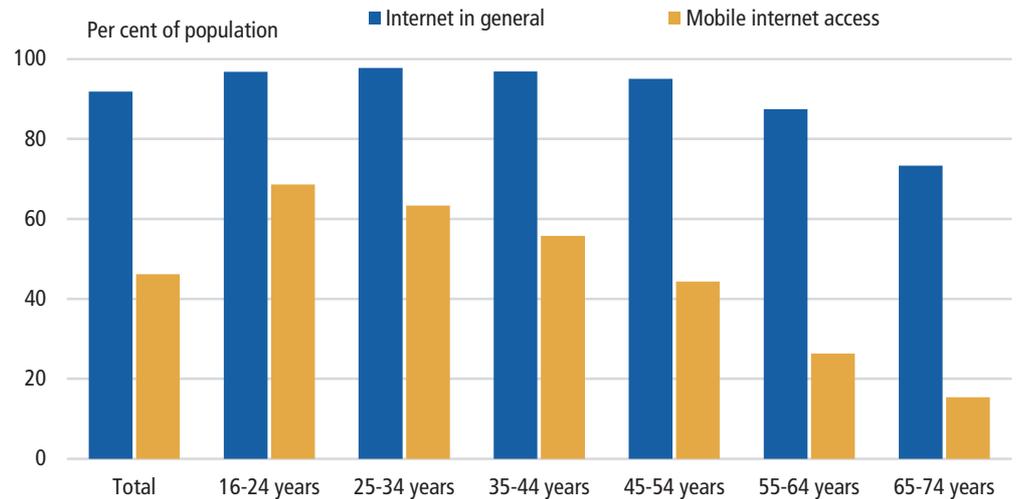
Note: 1 January.

www.statbank.dk/varforbr

Almost all Danes have now access to the Internet from their home

In 2011, 92 pct. of the population had access to the Internet at home. However, there are great differences among the age groups. While almost all 16-54-year olds have access to the Internet, only 87 pct. of persons aged 55-64 and 73 pct. of persons aged 65-74 have Internet access. The proportion of 75-89-year olds, who has Internet access, is as low as 36 pct.

Figure 8 Access to the Internet at home



www.statbank.dk/bebrit03

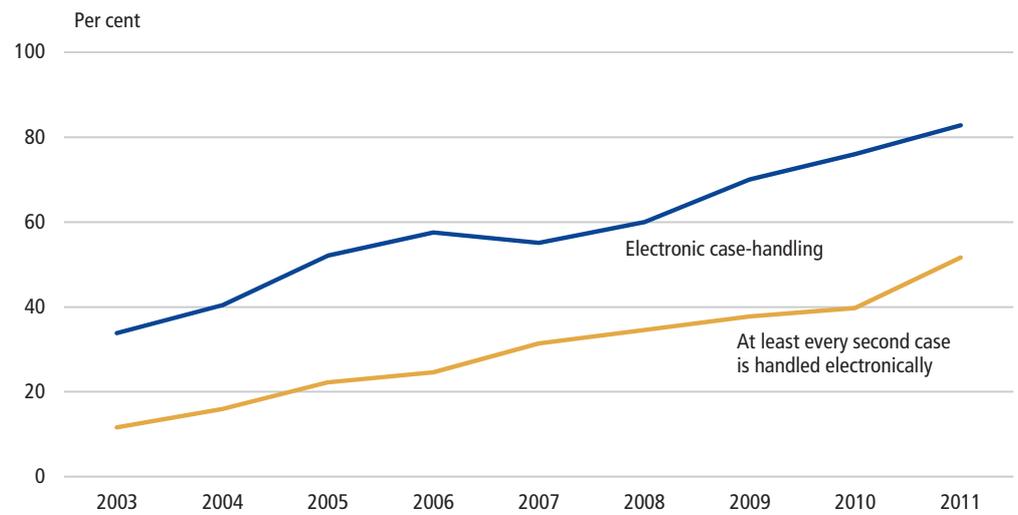
Out of the 92 pct. with Internet access, about half of the users have access to mobile Internet. The use of mobile Internet is most common among young people, as 69 pct. of all 16-24-year olds had access to mobile Internet in 2011. In comparison, the proportion using mobile Internet only made up 15 pct. for persons aged 65-74.

Electronic case and document management

During recent years public authorities are to an increasing extent making use of electronic case and document management. In 2011, 83 pct. of the public authorities used a system for electronic case management, while this was true of 76 pct. of the public authorities in 2010.

Among all public authorities 52 pct. stated that at least every second case is managed without the involvement of papers – this an increase from 40 pct. in 2010. The introduction of electronic case management does not imply that all cases are managed in a paperless way.

Figure 9 Authorities with electronic case handling



Note: Electronic case management is a system underpinning the case history between caseworkers.

Table 290 Value index for retail sale

	2009	2010	2011
	----- 2005 = 100 -----		
Retail trade and repair work exc. of m. vehicles	102	103	103
Supermarkets and department stores etc.	107	108	109
Retail sale of groceries and late-night stores	100	100	101
Supermarkets	99	96	95
Discount stores	122	129	140
Other retail sale in non-specialized stores	104	105	102
Retail sale of food in specialized stores	95	90	87
Retail sale of fruit and vegetables in specialized stores	81	69	49
Retail sale of meat and meat products	93	94	95
Retail sale of fish, crustaceans and molluscs	151	134	120
Retail sale of bread, cakes and flour confectionery	104	98	91
Retail sale of beverages in specialized stores	93	105	113
Retail sale of tobacco products in specialized stores	70	59	57
Other retail sale of food in specialized stores	100	106	120
Retail sale of consumer electronics	89	77	78
Retail sale of computers and software, etc.	112	111	119
Retail sale of audio and video equipment	93	75	70
Retail sale of textiles, house hold equipment, etc.	101	102	102
Retail sale of textiles in specialized stores	91	111	81
Retail sale of paints, varnishes and lacquers	66	61	61
DIY centres and tool stores	99	101	106
Retail sale of carpets and rugs, etc.	97	94	85
Retail sale of electrical household appliances	119	124	137
Retail sale of furniture	96	98	96
Retail sale of furnishing fabrics	93	89	89
Retail sale of kitchen utensils, glass and china	82	92	95
Retail sale of musical instruments	107	97	88
Dispensing chemist in specialized stores	105	107	104
Retail sale of cosmetic and toilet articles	101	103	107
Retail sale of flowers, plants and seeds	91	88	75
Retail sale of pet animals and pet food	175	194	212
Retail sale of watches and jewellery	100	94	96
Activities of opticians	106	97	103
Retail sale of photographic and optical equipment, etc.	105	94	81
Retail sale of gift articles and craftwork	96	113	121
Retail sale of other goods n.e.c.	88	74	67
Retail sale of cultural and recreation goods, etc.	102	104	103
Retail sale of books in specialized stores	79	79	76
Retail sale of music and video recordings	101	90	76
Retail sale of sporting and camping equipment	122	126	125
Retail sale of bicycles and mopeds	94	89	100
Retail sale of games and toys in specialized stores	102	110	115
Retail sale of wearing apparel	96	96	95
Retail sale of clothing	96	96	95
Retail sales of baby articles and children's clothing	101	92	87
Retail sale of footwear	86	93	90
Retail sale of leather goods	108	114	129
Retail sale via internet, mail order, etc.	70	63	59
Retail sale via mail order houses	86	82	79

www.statbank.dk/deta11 and deta21

Table 291 Holiday trips

	4 nights +				1-3 nights	
	Denmark		Abroad		2009	2010
	2009	2010	2009	2010		
Trips, total	...	3 068 000	...	4 375 000	...	20 345 000
Nights per trip	7.4	8.9	9.4	9.6	1.7	1.6
Means of transport	per cent					
Aeroplane	2	2	62	59	3	4
Car	80	75	26	27	75	72
Bus	3	3	6	8	4	5
Train	11	13	4	3	14	13
Ship	3	2	1	3	1	2
Boat	...	5	...	1	...	5
Bicycle	...	2	...		...
Other	1	75	1	51	3	7
Accommodation				4		1
Hotel	3	2	50	5	7	2
Holiday centre	2	2	3	2	1	0
Camping site	9	11	5	6	2	2
Youth hostel	0	1	2	4	1	13
Rented dwelling	18	13	9	0	2	...
Own dwelling	26	23	4	20	17	74
Boat	1	1	1	8	...	1
Family/friends	39	46	20		68	
Other	2	2	4	•	2	90
Destination				7		1
Denmark	100	100	•	4	90	1
Norway	•	•	6	9	1	4
United Kingdom	•	•	4	8	1	3
Sweden	•	•	8	6	4	0
Germany	•	•	7	13	3	0
France	•	•	7	5	0	0
Spain	•	•	16	28	0	0
Greece	•	•	5	20	0	0
Europe, total	•	•	26	59	0	4
Other countries	•	•	20	27	0	72

Note: The statistic was revised in 2008. Thus, the respondents are only asked about long holiday trips for the last 3 months instead of 12 months, as was the case earlier. Hence, comparison with former statistics is not possible. Due to methodological issues the number of trips in 2009 is only displayed as percentages of the population. All percentages are rounded off and it is therefore not possible to summarise to 100.

www.statbank.dk/11

Table 292 Business trips

	Denmark		Abroad	
	2009	2010	2009	2010
Trips	...	1 152 000	...	1 560 000
Nights per trip	1.8	1.7	3.8	4.2
Means of transport	per cent			
Aeroplane	9	12	75	75
Car	70	71	18	18
Bus	1	5	1	2
Train	19	12	3	1
Ship	1	...	3	2
Boat	...	...	...	...
Bicycle	...	...	...	...
Other	0	1	0	1
Destination				
Denmark	100	100	•	•
Norway	•	•	8	5
United Kingdom	•	•	8	7
Sweden	•	•	18	8
Germany	•	•	16	9
France	•	•	...	...
Spain	•	•	3	2
Greece	•	•	...	...
Europe, other	•	•	8	4
Other countries	•	•	38	23

Note: The statistic was revised in 2008. Thus, the respondents are only asked about long holiday trips for the last 3 months instead of 12 months, as was the case earlier. Hence, comparison with former statistics is not possible. Due to methodological issues the number of trips in 2009 is only displayed as percentages of the population. All percentages are rounded off and it is therefore not possible to summarise to 100.

www.statbank.dk/11

Table 293 Holiday rates for residents in Denmark

	2010Q1	2010Q2	2010Q3	2010Q4
	thousands			
Population, 15 years and over	4 552	4 560	4 558	4 572
	per cent			
Pct. taking holiday trip				
1 holiday trip	22	29	33	18
2 holiday trips	4	6	8	4
3 holiday trips	1	1	1	0
Holiday trip, total	27	36	43	22
No holiday trip	73	64	57	78
	thousands			
Number of persons taking holiday trips	1 216	1 644	1 938	1 021
Number of holiday trips	1 459	2 024	2 459	1 206
	trips			
Trips per traveller	1.20	1.23	1.27	1.18
Trips per person	0.32	0.44	0.54	0.26

Note: The statistic was revised in 2008. Thus, the respondents are only asked about long holiday trips for the last 3 months instead of 12 months, as was the case earlier. Hence, comparison with former statistics is not possible. Due to methodological issues the number of trips in 2009 is only displayed as percentages of the population. All percentages are rounded off and it is therefore not possible to summarise to 100.

www.statbank.dk/11

Table 294 Nights spent. 2011

	Hotels, etc.	Camping sites	Youth hostels	Marinas ¹	Holiday dwellings ²	Total
thousand person-nights						
Denmark, total	15 766	11 289	1 129	971	14 469	43 612
Region Hovedstaden	6 781	946	496	132	..	8 356
Region Sjælland	1 212	1 429	118	138	..	2 899
Region Syddanmark	3 697	4 259	242	392	..	8 591
Region Midtjylland	1 822	2 413	156	178	..	4 569
Region Nordjylland	2 253	2 241	104	131	..	4 728
Province København by	5 337	..	355	38	..	5 730
Province Københavns omegn	500	..	27	7	..	535
Province Nordsjælland	549	..	69	49	..	666
Province Bornholm	395	..	45	39	..	478
Province Østsjælland	153	..	36	6	..	196
Province Vest- og Sydsjælland	1 059	..	82	132	..	1 273
Province Fyn	871	..	69	275	..	1 214
Province Sydjylland	2 837	..	173	117	..	3 117
Province Østjylland	1 261	..	97	157	..	1 516
Province Vestjylland	561	..	59	21	..	641
Province Nordjylland	2 253	..	104	131	..	2 487
Nationality						
Denmark	9 241	8 724	719	498	3 566	22 749
Sweden	1 266	175	58	76	215	1 789
Norway	1 365	269	54	26	723	2 436
Germany	668	1 580	71	311	9 345	11 975
United Kingdom	532	30	23	8	..	592
Netherlands	325	292	22	37	321	996
Europe, other	1 430	206	130	12	..	1 779
United States	395	2	11	1	..	408
Other countries	546	13	28	3	300	889

Note: Hotels, motels, inns, boarding houses and holiday centre with 40 beds or over. Camping sites with 75 camping units or over. Marinas with berths for guests. Privately-owned holiday dwellings which are let through a Danish renting agency. www.statbank.dk/hotel1, camp1, vandrer, lyst1 and ferieh3

¹ The statistics covers the period May-September. ² The statistics for Holiday dwellings from 2009 has not yet been published. The numbers shown on Holiday dwellings are preliminary for 2011.

Table 295 Hotels, camping sites, youth hostels and marinas. 2011

	Hotels, etc.	Hotel beds ¹	Hotel rooms ¹	Camping sites ¹	Camping units ¹	Youth hostels	Marinas	Berths
Denmark, total	599	128 784	50 749	419	91 005	93	245	46 620
Region Hovedstaden	179	44 953	20 987	44	8 818	16	43	11 304
Region Sjælland	61	11 778	4 054	67	12 588	19	61	8 968
Region Syddanmark	148	31 658	11 094	132	30 407	25	67	14 137
Region Midtjylland	116	17 547	7 679	100	20 125	19	41	7 384
Region Nordjylland	99	23 530	7 149	76	19 216	14	33	4 827

¹ "Denmark, total" and the sum of the regions do not fit because the regions have their maximum capacity in different times of the year. The capacity is the maximum number of open units in a year in the particular area.

www.statbank.dk/hotel4 and camp3

Table 296 The ICT sector in Denmark. 2009

	Enter- prises	Full-time employees	Turn- over	Wages and salaries
	————— DKK mio. —————			
ICT industries, total	10 797	84 257	179 449	46 471
ICT manufacturing	304	5 873	9 875	2 710
ICT wholesale trade	1 081	13 416	48 501	7 617
Telecommunications	353	16 546	47 553	6 893
ICT services industries	9 059	48 422	73 520	29 249

Note: The figures cannot be compared with previous publications due to shift to new industry classification.

www.statbank.dk/iterhviderhv

Table 297 Enterprises' use of ICT. 2011

	Internet access	Own web site	Fixed broadband connection to the internet ²
	————— per cent —————		
All enterprises¹	98	89	91
Sectors			
Manufacturing	98	92	91
Construction	98	90	86
Trade and transport etc.	97	84	91
Information and communication	99	98	98
Business service and finance	98	92	93
Fuldtidsansatte			
10-19 employees	97	86	89
20-49 employees	98	91	92
50-99 employees	99	93	95
100 employees +	99	95	96

¹ All enterprises with at least 10 employees. ² ADSL o.l. or other fixed internet connection (faster than analogue modem or ISDN).

www.statbank.dk/vita and www.dst.dk/vita1

Table 298 Goods and services purchased on the Internet. 2011

	16-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75-89 years	Total
	————— per cent of age group —————							
Total	82	82	84	74	56	34	12	65
	————— per cent of population —————							
Tickets for events	56	62	61	49	31	19	5	44
Holiday accommodation	26	50	59	51	36	21	6	39
Other travel arrangements	31	49	52	46	30	19	6	36
Clothes, sports goods	52	48	52	32	17	8	2	33
Household goods (e.g. furniture, toys, etc)	21	42	47	34	22	14	2	29
Music, movies	41	43	38	28	13	9	2	27
Internet, television, phone subscription	29	39	38	28	17	11	3	25
Books, magazines, newspapers	21	30	33	32	21	12	3	24
Electronic equipment	31	34	35	25	16	9	2	24
Other computer software	24	25	32	25	17	10	3	21
Video games software	29	24	29	16	6	3	1	17
Computer hardware	18	20	21	16	11	7	1	15
Share purchases, financial services or insurances	8	15	14	10	9	5	2	10
Food or groceries	5	13	13	8	7	3	1	8
Medicine	3	3	5	7	8	3	2	5
E-learning material	7	7	5	6	2	2	0	5

www.statistikbanken.dk/bebrit08

Table 299 Access to computer and internet in the home

	2004	2005	2006	2007	2008	2009	2010	2011
	per cent of households							
Computer access from home								
Total	80	84	85	83	85	86	88	90
Single adult without children	66	71	72	70	0	80	82	84
Couple without children	80	83	85	84	85	87	90	93
Single adult with children	87	87	93	93	92	93	96	94
Couple with children	94	98	97	97	0	98	98	98
Internet access from home								
Total	70	74	78	78	82	83	86	90
Single adult without children	55	58	64	63	0	74	79	84
Couple without children	69	75	79	80	81	84	88	93
Single adult with children	69	70	83	87	89	91	95	91
Couple with children	88	93	94	96	0	97	97	99

www.statbank.dk/fabrit01

Table 300 Internet and telephony

	2009	2010 ¹	2011 ¹
Subscriber line, fixed network (1.000) ²	2 392	2 253	2 194
Per 100 inhabitants	43.2	40.5	39.3
Mobile subscriptions ³ (1.000)	7 421	7 790	7 962
Per 100 inhabitants ³	134.1	140.1	142.7
Internet subscriptions (1.000)	2 158	2 216	2 240
Per 100 inhabitants			
xDSL subscriptions (1.000)	1 251	1 243	1 207
Cable modem subscriptions (1.000)	549	559	576
Fibre subscriptions(1.000)	138	171	219
Mobile broadband subscriptions (1.000) ⁴	...	3 546	4 472
Dedicated data subscriptions (1.000)	587	791	915
	mio. minutes		
Domestic traffic, fixed network ⁵	6 744	6 066	5 353
International traffic, fixed network ⁵	462	428	413
Domestic traffic, mobile network	9 904	10 733	11 584
International traffic, mobile network	462	591	730
	mio.		
SMS sent	13 057	13 029	12 321
MMS sent	75	85	98
	no. mio. MB in period		
Mobile data traffic	...	14 997	26 006
	DKK mio.		
Revenues	40 709	40 557	..

¹ 2009 og 2010 is updated figures compared to last year's yearbook. ² Including fixed network IP telephony subscriptions ³ Omfatter GSM-, UMTS-, CDMA2000-abonnementer, mobilt bredbånd og aktive GSM- og UMTS-taletidskort. Et taletidskort anses for aktivt, hvis der har været indgående eller udgående trafik eller reloads af taletidskortet inden for de seneste 3 måneder. Eksklusive rene GPRS-abonnementer uden samtidig tale og telemetri-abonnementer. ⁴ Cover the following subscriptions with a marketed/theoretical downstream capacity of a minimum of 256 kbit/s: Standard mobile subscriptions used for Internet data traffic, supplementary data subscriptions for mobile subscriptions and dedicated data subscriptions. ⁵ Inklusive trafik fra fastnet IP-telefoni. *

Source: www.itst.dk/statistik/Telestatistik/halvarsstatistik