

Partnership for International Train Tourism

train tourism

partnership for international train tourism

© Nathan J Hilton

Introduction

Wonderful Copenhagen:

- The official tourism organisation of the Capital Region of Denmark
- Initiator and lead of the partnership

Implement Consulting Group:

- A global management consulting firm
- Conducted the initial analysis and developed the evidence base



Boosting Rail Tourism

FACTORS BOOSTING INTERNATIONAL RAIL



Tourism is growing in major cities across Denmark



Both business and leisure travelers want to travel more sustainably



Operators and destination marketing organizations are focusing their attention to international rail services



New investments are being made to reduce travel time



International night trains are gaining some momentum

Direct connections – launched and in pipe

train tourism
partnership for international train tourism

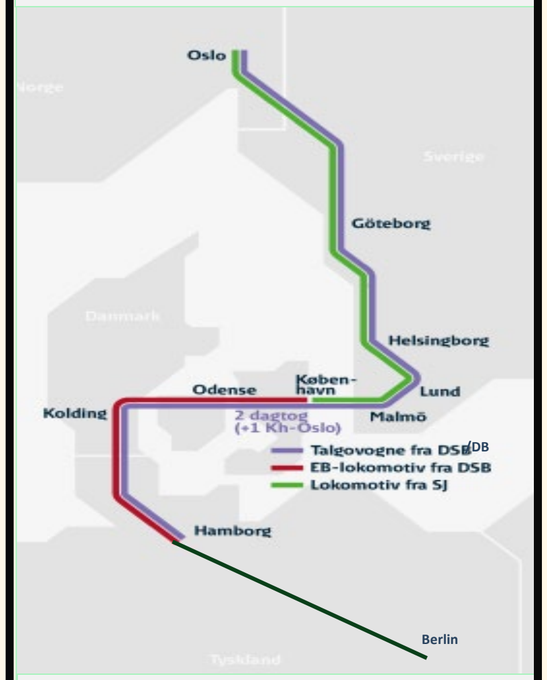
2026 Schedule



Partners: CD & DB
Trains: CD Comfort Jet + DSB & CD locomotives

Tickets for sale now
Operation starts May 2026

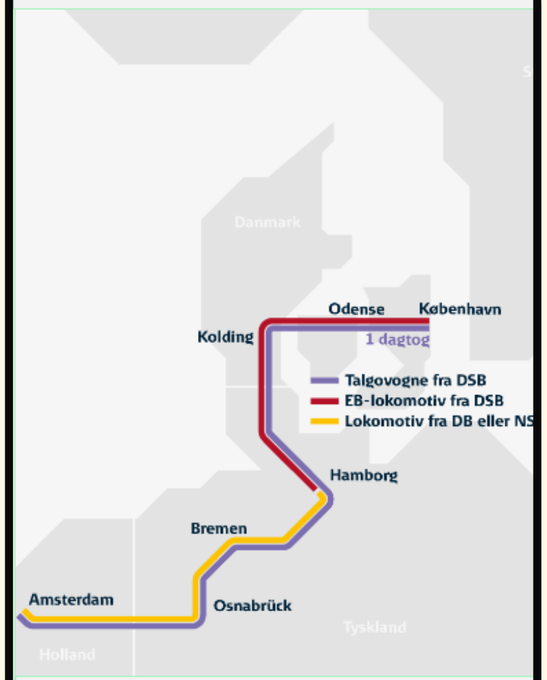
2028 Schedule



Partners: Vy & DB
Trains: DSB Talgo + Vy or DSB locomotives

Project in proces
Announced May 1st 2026

202X Schedule



Partners: NS & DB
Trains: DSB Talgo + NS locomotives

Firm commitment
Timeline uncertain

- None of the direct connections would have been possible without close operation among our collegue-operators
- Source: DSB

Background | The City of Copenhagen and Wonderful Copenhagen have the backing to act

Political Mandate

The City of Copenhagen, in collaboration with Wonderful Copenhagen, has identified strong political backing for a partnership on international rail tourism

Evidence Base

The Implement analysis confirms growing potential for international rail tourism to, from and via Copenhagen

Decision and Funding

The City Council has allocated funds in Budget 2026 for partnership activities in the period 2026–2029

Key Stakeholders

Key stakeholders in Central and Northern Europe – all with a key role to play in increasing train tourism.



Purpose of the Partnership

Aims to promote **sustainable tourism***
transport to, from and via Copenhagen,
especially from nearby markets

**Tourism cover both leisure and business*



No single partner can create the complete international rail journey

togturisme
partnerskab for international togturisme

ANCHOR THE SERVICE	ENABLE THE SERVICE	MARKET THE SERVICE	RUN THE SERVICE
Ministries & agencies - Political support - Funding - Regulation	**International train operators** - Route development & business cases - Passenger insights & market access - International train services		
Municipalities - Local anchoring - Destination development - Political support	**Infrastructure managers** - Capacity planning - Technical expertise - Infrastructure development	**Destination organisations** - Traveller insights & travel patterns - Destination marketing - Networks & collaboration	**Local transport companies** - Mobility integration - Local connections
Cross-border networks - Regional coordination - Advocacy - Knowledge sharing		**Travel agencies & distributors** - Customer access - Booking and distribution - Market insights	
NGOs & experts - Advocacy - Knowledge and evidence - Independent perspectives	**Start-ups** - New products & concepts - Digital solutions - Market innovation		

Partner roles overlap, and several actors contribute across more than one part of the journey.



Industry Insights

Our dialogue with operators, destinations and public authorities points to a common conclusion:
-Major infrastructure and capacity decisions are long-term and largely driven at national and European level.

However, there is significant potential to accelerate international rail tourism through collaboration, knowledge sharing, coordinated communication and joint destination promotion.

train tourism
partnership for international train tourism

Where the Partnership can make a difference

Inform and communicate

- Sector Challenges
- Passenger communication
- Travel benefits

Coordination and collaboration for a fact-based debate

- Data analysis
- Insight sharing
- Narrative building

Strengthening the public debate (advocacy)

- Policy engagement
- Public advocacy
- Media presence

Marketing and visibility

- Destination branding
- Passenger benefits
- Increased visibility

Knowledge community

- Partner meetings
- Online engagement
- Knowledge sharing

train tourism
partnership for international train tourism

Train operators' challenges | How can a sound business case be secured without taking on major risks?

OPERATOR CHALLENGES

- Small market today – despite high growth rates
- Seats must be filled in both directions – requires market access in the destination country
- Commercial operation with limited scope for PSO contract payments
- Rolling stock constraints – especially for night and sleeper trains

INFRASTRUCTURE CHALLENGES

- Train path allocation does not favour international passenger trains
- Attractive platform access at Copenhagen Central (at peak hours) are fully used by commuter traffic
- Good alternatives to Copenhagen Central – e.g. Copenhagen South – are not seen as attractive by international operators
- Infrastructure challenges in cross-border operation increase costs

train tourism
partnership for international train tourism

The rail tourism opportunity | Approximately 40% of tourists arrived in Copenhagen from destinations that could be reached by train

Estimated number of international tourists, 2024[1]

Top 10 countries	Multi-day-tourists (1000s)	% of total	Annual growth 2017-24, %
Germany	638	20.0%	6%
USA	334	10.5%	6%
UK	311	9.7%	4%
Sweden	258	8.1%	-1%
Norway	173	5.4%	-2%
France	138	4.3%	10%
Italy	134	4.2%	5%
Netherlands	129	4.0%	7%
Spain	104	3.3%	6%
Poland	81	2.6%	14%

Graphic overview of 10 countries (excl. US)



Attention from operators | Domestic and foreign operators see opportunities in the Scandinavian market

train tourism
partnership for international train tourism



The DSB-DB collaboration is being expanded as rolling stock becomes available



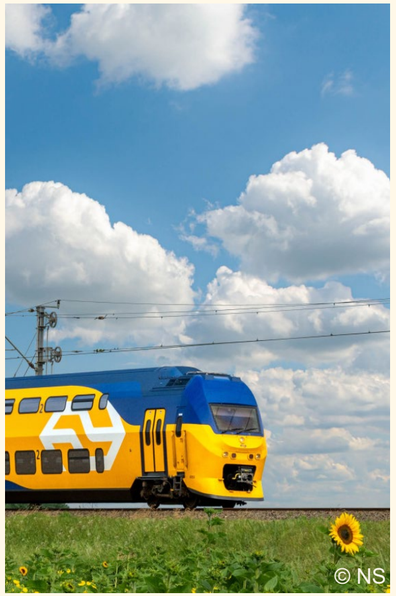
DSB-VY opened a direct Copenhagen-Oslo connection in 2026



SJ is exploring options for increased service between Stockholm, Copenhagen, Gothenburg and Oslo



DSB-CD opened a direct Copenhagen-Prague connection in May 2026



NS has indicated interest in creating a better connection towards Hamburg-Copenhagen



European Sleeper has indicated interest in creating a better connection between Brussels and Malmö

Source: The companies' websites, press releases and Interviews

togturisme
partnerskab for international togturisme

Infrastructure investments | Copenhagen to become natural gateway to Scandinavia for international rail tourism with Hamburg as main counterpart

PRELIMINARY ESTIMATES

Today the Fehmarn Belt Connection: Travel time from Copenhagen (selected cities within ~8 hours)



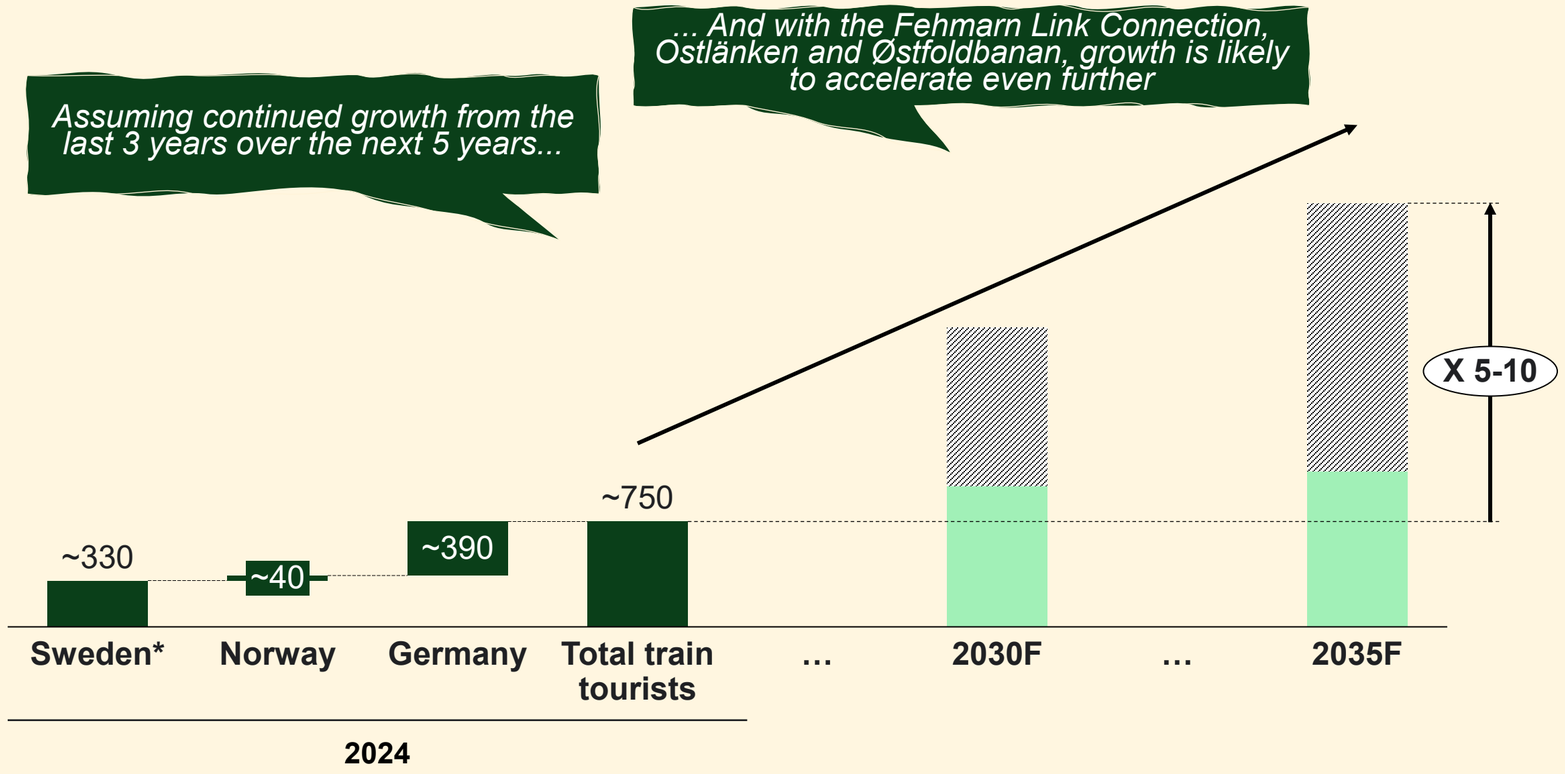
Likely scenario for ~2035: Travel time from Copenhagen (selected cities within ~8 hours)



Note: Travel times *after* the Fehmarn Belt opening south of Hamburg exclude any waiting time in Han…
*) Assumes the completion of Østfoldbanen between Göteborg and Oslo **) Assumes completion of Ostlänken ***) Assumes completion of Femarn Link Connection
Source: Chronotrains; Implement Analyssis

Likely scenario | Low starting point – high growth rates

Current and expected rail tourism to Copenhagen
Unit: Thousand tourists to Copenhagen per year (inbound only)



Historically high growth rates despite limited marketing efforts from operators

Note: * Does not include travelers from southern Sweden
Source: Implement Analysis; VisitDenmark survey; Wonderful Copenhagen analysis; Statistics Danmark; DSB



© D.C.



Progress to date

- Partnership organisation and governance
- Partner development
- Sector knowledge and analysis
- Partnership scope
- Brand development
- Partnership events and activity streams
- 1st project: Marketing and CopenPay

2 June: First Partner Meeting

- More than 40 participants from all over Northern Europe
- Presentations from **DSB, DB, Amsterdam Municipality & NOX Mobility**
- Confirmation of the potential of international rail tourism and the need for cooperation

The partners identified three key priorities for the partnership in the coming years:

- Creating demand for international train travel
- Strengthen destination branding and joint marketing
- Develop a strong community for knowledge sharing



Marketing Project in North Germany (Copenpay)

Messaging hierarchy:

1. Choose Copenhagen

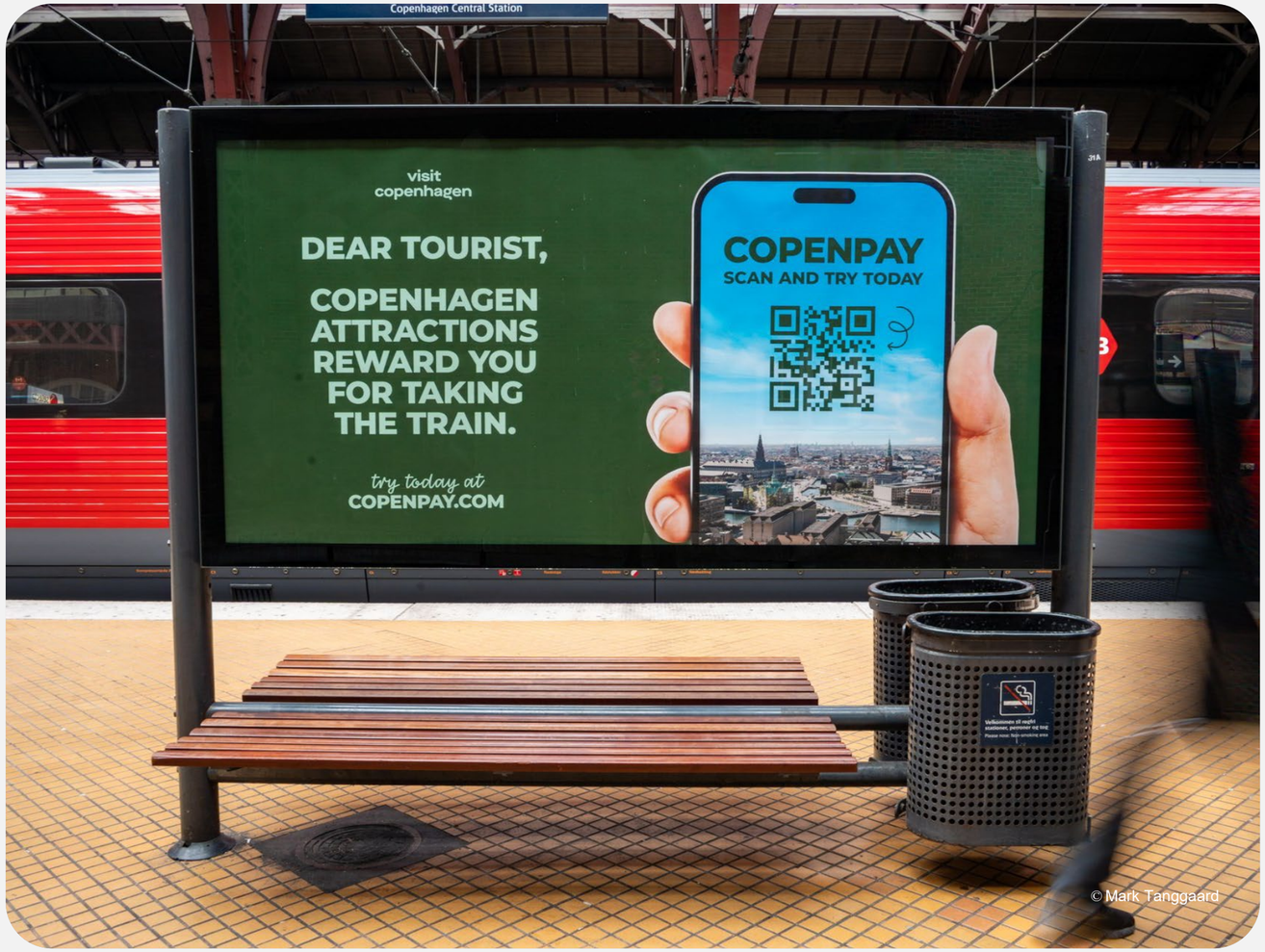
- A city worth travelling for culture, atmosphere and urban experiences.

2. Arrive easily and comfortably by train

- The train is the simple, relaxed and sustainable way to get close to the city.

3. Get more out of your trip with CopenPay

- CopenPay rewards travelers, e.g. those who make responsible transport choices – including choosing the train.



Conference 17 November

Pre-dinner 16 November

- Takes place in Copenhagen Central Station
- Agenda with both Key-note speakers and break-out sessions
- A great possibility for knowledge building, networking and having an impact on the work ahead



