

Working Paper no. 28

Feasibility of establishing seasonal flights to Bornholm

by

Carl Henrik Marcussen

Centre for Regional and Tourism Research
Stenbrudsvej 55
DK-3730 Nexø, Denmark
Tel.: +45 56 44 11 44, Fax: +45 56 49 46 24
E-mail: crt@crt.dk, Homepage: www.crt.dk

Copyright: © 2006 Centre for Regional and Tourism Research and Carl Henrik Marcussen

No part of this report may be reproduced, stored in a retrieval system or transmitted in any form of means electronic, mechanical, photocopying, recording or otherwise, without prior written permission by the Centre for Regional and Tourism Research. Brief text quotations are exempted for review, press and academic purposes.

ISBN: 87-91677-13-0
Net ISBN: 87-91677-14-9

June 2006



The European Union

Preface

At the moment there are year-round flights between Copenhagen and Bornholm (166.000 passengers in 2005). Although there are holiday flights directly from Bornholm to southern Europe, there are no international seasonal flights to Bornholm at the moment. However, summer flights to Bornholm from Billund have started as of the end of May 2006, with three rounds per week and this is going well.

The purpose of this study has been to uncover the potential for establishing additional seasonal flights, notably direct summer flights, to Bornholm.

The project has been carried out by a senior researcher at the Centre for Regional and Tourism Research, CRT (www.crt.dk), Carl Henrik Marcussen, MBA, PhD, reporting to a three person steering committee, with which there have been a number of meetings during the course of the project period:

- Mr. Mikkel Jensen, development manager, Destination Bornholm
- Mr. Peter Hviid, director, Bornholm Airport
- Mr. Mikkel Toudal, administrator/consultant, CRT

This study has been sponsored by

- Bornholm Airport
- the Regional Municipality of Bornholm, and
- the European Regional Development Fund.

Destination Bornholm, the destination marketing company of Bornholm (cf. www.bornholm.info), has hosted the project, and Bornholm Airport (www.bornholms-lufthavn.dk/en/) plays a key role in the further process.

Peter Billing

Director
Centre for Regional
and Tourism Research

Kim Hjorth Caspersen

Director
Destination Bornholm

Peter Hviid

Director
Bornholm Airport

Summary

The catchment area has been defined as approx. 100 km driving distance from the airport.

Three criteria have been applied for evaluating departure airports:

1. There should preferably be at least 500 information requests received by Destination Bornholm (the tourism promotion company of the island) in 2005.
2. There should preferably be at least 1 million people in the catchment area.
3. The distance from the catchment area to the ferry port should preferably be at least 500 km.

Oslo and Stockholm fulfil all three criteria. Hamburg, Berlin, Düsseldorf and Hanover are the most promising departure airports in Germany for Bornholm. Düsseldorf is within the catchment area of Cologne-Bonn. Zurich and Basel are also close. Flights should only be considered for either Düsseldorf or Cologne, and Zurich or Basel, respectively.

Ranking of potential departure airports by number of information requests

Rank	Airport	Criteria 1: Requests	Criteria 2: Catchment	Criteria 3: Distance
1	Aalborg, DK	842	0,5	502
2	Hamburg (w/SH)	587	5,2	327
3	Oslo Gardermoen	559	1,6	628
4	Stockholm Arlanda	558	2,5	673
5	Hanover (NS)	524	6,7	474
6	Düsseldorf (NW1)	424	11,3	720
7	Göteborg	386	1,5	327
8	Berlin-Brandenburg	372	6,0	309
9	Norrköping	276	1,0	527
10	Munich (BY)	240	12,4	866
11	Bremen	238	1,8	425
12	Stuttgart (BW)	235	10,7	912
13	Frankfurt (HS)	213	6,1	808
14	Münster (NW2)	209	2,2	596
15	Sandefjord Torp	189	0,6	586
16	Cologne-Bonn NW3	186	4,8	742
17	Amsterdam	165	15,7	787
18	Warsaw, PL	158	5,1	527
19	Hahn (RF+Saarl.)	97	5,1	919
20	Katowice (Krakow)	78	8,0	654
21	Zürich (ex. overlap)	83	3,8	1126
22	Helsinki	65	2,1	930
23	Basel (ex. overlap)	50	2,1	930
24	Brussels (100% B)	40	10,4	913
25	Paris	29	9,6	1215
26	London	29	7,4	1186
27	Milan (Lombardia)	28	9,1	1425
28	Vienna (50% of A)	25	4,0	959
Now	Billund (3*week)	3250	1,7	352

Contents

Preface	3
Summary.....	5
1. Introduction.....	11
2. General overview of the markets.....	13
2.1 The transport routes to/from Bornholm 2000-2005	13
2.2 Bednight statistics 2000-2005	14
2.3 Details about the most important segments.....	19
2.4 Length of stay.....	20
2.5 Seasonality.....	22
2.6 Where do those interested in visiting Bornholm come from?.....	24
3. Germany	29
3.1 Seasonality – Germany.....	33
3.2 Case: Seasonal Flights to Sylt from Germany.....	34
4. Sweden	43
4.1 Seasonality – Sweden	47
4.2 Case: Seasonal flights from mainland Sweden to Gotland	48
5. Norway.....	51
5.1 Seasonality - Norway	56
5.2 Case: Oslo-Gotland -- price and distribution	58
6. Poland	59
6.1 Seasonality - Poland	63
7. Netherlands.....	65
7.1 Seasonality – Netherlands	67
8. Switzerland	69
8.1 Seasonality – Switzerland.....	71
8.2 Switzerland – Copenhagen	72
9. United Kingdom.....	75
10. Austria	77
11. Italy.....	79
11.1 Seasonality – Italy	81
12. Finland	83
13. Other international markets.....	85
14. Denmark – the domestic market	87
14.1 Seasonality – Danes on Bornholm.	89
14.2 Summary about the Danish market.....	90
15. What airlines are well positioned to fly to Bornholm, from where	91
16. How should the holidays to Bornholm be organised and sold?	93
17. Conclusion	97
18. References	103
19. Enclosures.....	105
Encl. 1. About the 8 most important segments.....	105
Encl. 2. Holiday cottage statistics – for Bornholm and for DK overall	106
Encl. 3. People interested in visiting Bornholm by city in Germany.....	108
Encl. 4. Splitting Nordrhein-Westfalen into 3 catchment areas, by airport.....	112
Encl. 5. HLX and Wolters Reisen within the TUI Group	113
Encl. 6. re. Sweden.....	115
Encl. 7. Splitting Switzerland into three catchment areas.....	116
Encl. 8. re. Switzerland: The Bodensee-Airport Friedrichshafen (D)	117
Encl. 9. Homepages of hotels at Bornholm	118

Figures

Figure 1	Split of travellers to/from Bornholm by transport connections – 2000-2005 (%)	13
Figure 2	Passengers to and from Bornholm per year 2000-2005:	13
Figure 3	Arrivals to Bornholm per year – 2000-2005: Over 800.000 p.a. since 2001	14
Figure 4	Registered bednights on Bornholm by market, 2000-2005 (all types of accommodation).....	14
Figure 5	Bednights by type of accommodation per market, Bornholm 2005	16
Figure 6	20% of the bed capacity, 33% of bednights but 57% of accommodation revenue on Bornholm were in hotels and holiday centres in 2005	17
Figure 7	Bednights in hotels and in holiday centres on Bornholm by nationality, 2005.....	18
Figure 8	Length of stay by nationality in hotels and other types of accommodation.....	21
Figure 9	Development in length of stay on Bornholm 1998-2005 (holiday cottages only).....	21
Figure 10	All guests at hotels etc. on Bornholm – All information requests – by month	22
Figure 11	All guests at hotels etc. on Bornholm – All information requests by month – accumulated.....	23
Figure 12	Do those who show interest in Bornholm actually show up? – Danes and some others do (short-medium travel time), Finns don't (too long travel time)	26
Figure 13	Those with long travel time don't come, even if they are interested in Bornholm	27
Figure 14	a: The fewer hours of travel to Bornholm, the more hotelnights per million people. b: Info requests about Bornholm by market correlates very closely with hotelnights on Bornholm by market.....	28
Figure 15	Number of passengers on the ferry route Sassnitz-Bornholm 1998-2005	29
Figure 16	Map of the 16 states in Germany – and the main cities of Germany	30
Figure 17	Relative strong position of Bornholm in 6 of 16 states in Germany - 2005	32
Figure 18	Hotel guests on Bornholm and information requests by month (2005) – Germans	33
Figure 19	Hotel guests on Bornholm and information requests by month accumulated – Germans	33
Figure 20	Outbound seat capacity per week from the different airports in Germany to Sylt (2006).....	35
Figure 21	Capacity per week in each directions, for people travelling by car, up to 4 persons per car, and rounds per week, Bornholmstrafikken, Sassnitz-Rønne, 2006	36
Figure 22	The share of seat capacity offered to Sylt Airport by 7 airlines (full year 2006)	36
Figure 23	The share of seat capacity offered to Sylt Airport from 9 German cities (full year 2006)	37
Figure 24	Return prices on selected routes to Sylt, including all extras, as of end of week 22, 2006	38
Figure 25	Average return prices on routes to Sylt, including all extras, as of end of week 22, 2006	39
Figure 26	Average return prices paid on routes to Sylt by tourists, including all extras, 2006.....	40
Figure 27	Average prices online for Air Berlin, Düsseldorf-Sylt, week 23-43, and for HLX, Cologne/Bonn-Sylt, week 23-41, Friday-Sunday, Sunday-Tuesday, Tuesday-Friday, return including all extras as checked by the end of week 22, 2006.....	41
Figure 28	Return prices to Sylt, online, checked by end of week 22, for travel week 23-43, 2006	41
Figure 29	Map of Sweden – with counties.....	43
Figure 30	Bornholm's position in the 21 counties of Sweden (2005).....	45
Figure 31	Hotel guests on Bornholm and information requests by month (2005) – Sweden.....	47
Figure 32	Hotel guests on Bornholm and information requests by month accumulated – Sweden	47
Figure 33	Prices of City Airline AB for Gothenburg-Visby, return, 2006, as of end of May	49
Figure 34	Prices in each direction for the route Helsingborg-Visby, 2006.....	50
Figure 35	Map of Norway – The 20 counties with administrative centres mentioned.....	51
Figure 36	Bornholm's relative position in the 7 regions of Norway	52
Figure 37	Bornholm's relative position in the 19 counties of Norway	55
Figure 38	Hotel guests on Bornholm and information requests by month (2005) – Norway	57
Figure 39	Hotel guests on Bornholm and information requests by month accumulated – Norway	57
Figure 40	Lowest return prices incl. taxes and fees, Oslo-Gotland, go 17/6-12/8 (19/8) 2006	58
Figure 41	The relative interest in Bornholm of people from each of 6 regions in Poland.....	59
Figure 42	Map of the 16 voivodships (counties) of Poland - with abbreviations.....	60
Figure 43	Analysis of Poland by voivodship (county): Population, interest in Bornholm, and km to ferry ...	61
Figure 44	Relative interest in Bornholm by each of 16 voivodships in Poland (2005).	62
Figure 45	Hotel guests on Bornholm and information requests by month (2005) – Poland.....	63
Figure 46	Hotel guests on Bornholm and information requests by month accumulated – Poland.....	64

Figure 47	Map of the Netherlands.....	66
Figure 48	Analysis of the Netherlands: Population and interest in visiting Bornholm	67
Figure 49	Relative interest in visiting Bornholm from different regions in the Netherlands	67
Figure 50	All tourists on Bornholm and information requests by month (2005) – from the Netherlands....	68
Figure 51	All Dutch tourists on Bornholm - and information requests from the Netherlands	68
Figure 52	Map of Switzerland	69
Figure 53	The main airports in Switzerland (2005).....	70
Figure 54	Season for stays on Bornholm by Swiss tourists in hotels and holiday centres (2005) – and average for the period 2000-2005	71
Figure 55	Price analysis of the route Zurich-CPH (return including taxes and fees), week 20, 2006	72
Figure 56	Half of the British hotel guests visit Bornholm in August	76
Figure 57	The 20 regions of Italy	79
Figure 58	Relative position of Bornholm in the 5 zones in Italy	81
Figure 59	Italians visit Bornholm in August, if they come	81
Figure 60	The 6 provinces of Finland	83
Figure 61	Finns come to Bornholm in July, if they come	83
Figure 62	Relatively strong interest in visiting Bornholm from the regions Zealand, Funen and Vejle County.....	88
Figure 63	Hotel guests on Bornholm and information requests by month (2005) – Danes.....	89
Figure 64	Hotel guests on Bornholm and information requests by month accumulated – Danes.....	90
Figure 65	Internet-based vs. traditional/other distribution channels for airtickets, hotels and packages	94
Figure 66	Number of information requests about Bornholm by airport (city and full catchment area)	100
Figure 67	Bornholm vs. Majorca (Alcudia): Minimum prices in EUR per person for ticket+transfer+3 star hotel on Bornholm vs. minimum prices at www.TUI.de of packages with 3 star hotel from NW.....	114
Figure 68	Friedrichshafen Bodensee Airport – on the German side	117

Tables

Table 1	Split of the bednights on Bornholm by market and by type of accommodation, 2000-2005	15
Table 2	No. of hotels and holiday centres on Bornholm, room and bed capacity in these (2005)	16
Table 3	Bednights in hotels and in holiday centres on Bornholm by nationality, 2005.....	18
Table 4	Season for hotels and holiday centres on Bornholm by nationality, 2005.....	24
Table 5	Information requests and bednights in hotels and holiday centres on Bornholm by market	25
Table 6	Travel time to Bornholm is an important factor, when interest in visiting Bornholm should be converted to actual visits.....	27
Table 7	Bednights for Germans staying at Bornholm, 2000-2005	29
Table 8	10.500 Germans stayed in hotels and holiday centres on Bornholm in 2005.....	30
Table 9	Summary of analysis of Germany.....	31
Table 10	Airlines serving Sylt Airport 2006: Which airports, airplanes, rounds per week, period, seats....	34
Table 11	Population in Sweden's 21 counties and requests sent to Destination Bornholm – 2005.	44
Table 12	City Airline AB is flying from Gothenburg to Visby (2006), and could fly to Bornholm.....	48
Table 13	Prices of City Airline AB for Gothenburg-Visby, return, 2006, as of end of May	49
Table 14	Population in the 7 parts of Norway and information requests about Bornholm (2005)	52
Table 15	Population in the 19 counties Norway – and information requests about Bornholm in each (2005)	54
Table 16	Population in the six regions of Poland and the interest in Bornholm in each region (2005).....	59
Table 17	The top 3 Swiss airports – with respect to passengers to/from Denmark (2004).....	70
Table 18	The Swiss population and information requests about Bornholm by nearest airport.....	70
Table 19	Basel and Zurich cantons are in each others catchment areas	71
Table 20	Hotel bednights in Denmark and on Bornholm: Relatively few UK bednights on Bornholm	75
Table 21	Geographic analysis of the Italian market: Population and interest in Bornholm by regions (A)..	79
Table 22	Geographic analysis of the Italian market: Population and interest in Bornholm by regions (B) .	80
Table 23	Population by province in Finland – and interest in visiting Bornholm	83

Table 24	Finns accounted for a much smaller percentage of bednights on Bornholm than in other parts of Denmark <i>outside</i> of the capital (province)	84
Table 25	Analysis for Denmark: Percent of population and percent of people interested in visiting Bornholm by county (2005).....	87
Table 26	Top 17 post code areas in Denmark by share of people interested in visiting Bornholm.....	89
Table 27	Distribution of airtickets, hotels and packages for holidays on Bornholm	94
Table 28	On Bornholm there are a dozen members of the Danish Travel Guarantee Fund.....	95
Table 29	Ranking of potential departure airports by number of information requests.....	99
Table 30	Who could fly to Bornholm, with what type of airplane, during what season, how many roundtrips, with what total capacity of seats offered from top half of top 20 airports.....	101
Table 31	13 hotels on Bornholm, online bookable at www.tui-ferienhaus.de	113
Table 32	Cheapest weekly rate for hotels on Bornholm.....	113
Table 33	Information requests sent to Destination Bornholm – from Sweden – by 1 st digit post codes ...	115
Table 34	Top 15 municipalities in Sweden	115
Table 35	Friedrichshafen in Southern Germany: Not an alternative to Zurich for flights to Bornholm.....	117

1. Introduction

Background

Airtravel has gained increasing importance as a means of transport to/from Bornholm. Airtravel accounted for 7% of passengers to/from Bornholm in 2004, but that increased to 10% in 2005 and could be even higher in 2006. DAT started flying on the route Copenhagen (CPH) – Bornholm on 1 July 2005. In the second half of 2005 the number of passengers to/from Bornholm Airport was 60% higher than in the second half of 2004. The incumbent operator, Cimber Air, maintained its number of passengers and even increased the number slightly; and it carries out direct flights on the route Billund-Bornholm three times a week from 26 May to 13 August 2006.

So far there have only been domestic scheduled flights to/from Bornholm Airport. Additionally, there are not-scheduled (charter) flights, until 2005 solely by small airplanes, in this decade at least. Charter flights by large airplanes also take place occasionally, in 2006 both to Turkey and to Trieste in Italy on the border to Croatia. Also there will be direct charter flights from Bornholm Airport to Bulgaria in 2006 (by Penguin Travel).

However, there are no international summer flights for bringing tourists directly to Bornholm.¹ Therefore there is reason to investigate whether there are base and justification for establishing direct summer flights from primarily the large nearby market Germany. In 2005 there was a decline in the number of passengers on the ferry route Germany-Bornholm of 25% due to change of operator, ship and schedules.

Objective

The objective of this study is:

1. To list:
 - a. the most promising countries
 - b. the most promising cities/airports within these countries
2. To identify:
 - a. the airlines that could serve the new route
 - b. the type of aircraft to use
 - c. any tour operators, hotels in Bornholm and other local actors with the potential to cooperate with each and with the airlines.

The objective of this study is to list what countries and within these what cities/airports which are most promising, what airline could serve these new routes, by what types of airplanes and in cooperation with what tour operators (if any), what hotels on Bornholm and what other local actors.

Key questions

1. What markets (countries) and specifically what cities (airports) have the greatest potential for tourists flying on holiday to Bornholm?
2. What airlines could carry out summer flights to Bornholm?
3. How could the services be distributed and by whom could the holidays be organised?
(Who could be the tour operators, and should seat only also or alternatively be offered? What types of accommodation are relevant?)

¹ In the 90s there were direct summer flights to Bornholm from several cities in Germany: Düsseldorf, Dortmund, Münster, Hamburg, by Lufthansa/Eurowings, though.

2. General overview of the markets

2.1 The transport routes to/from Bornholm 2000-2005

There have been over 1,6 million passengers per year during the last five years on all routes and transport modes, i.e. over 800.000 arrivals per year. The travellers are visitors as well as residents. The ferry route Ystad-Rønne accounted for 75% of all passengers to/from Bornholm in 2005. Air transport accounted for 10% in 2005. The ferry route to Germany accounted for 5,5% of the number of passengers (and arrivals) to Bornholm in 2005.

Figure 1 Split of travellers to/from Bornholm by transport connections – 2000-2005 (%)

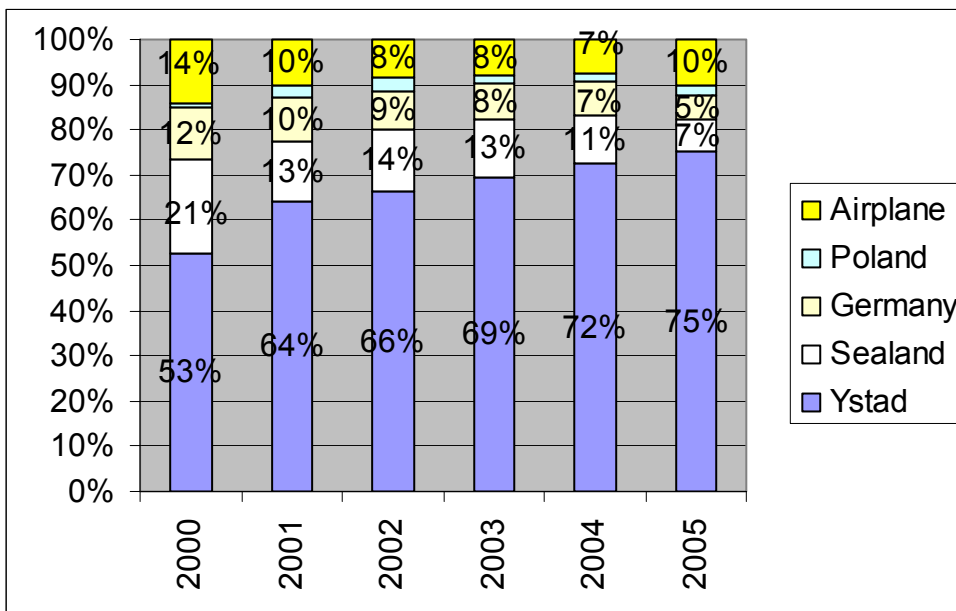


Figure 2 Passengers to and from Bornholm per year 2000-2005:
Over 1,6 million p.a. since 2001. Airplane 166.000 passengers in 2005

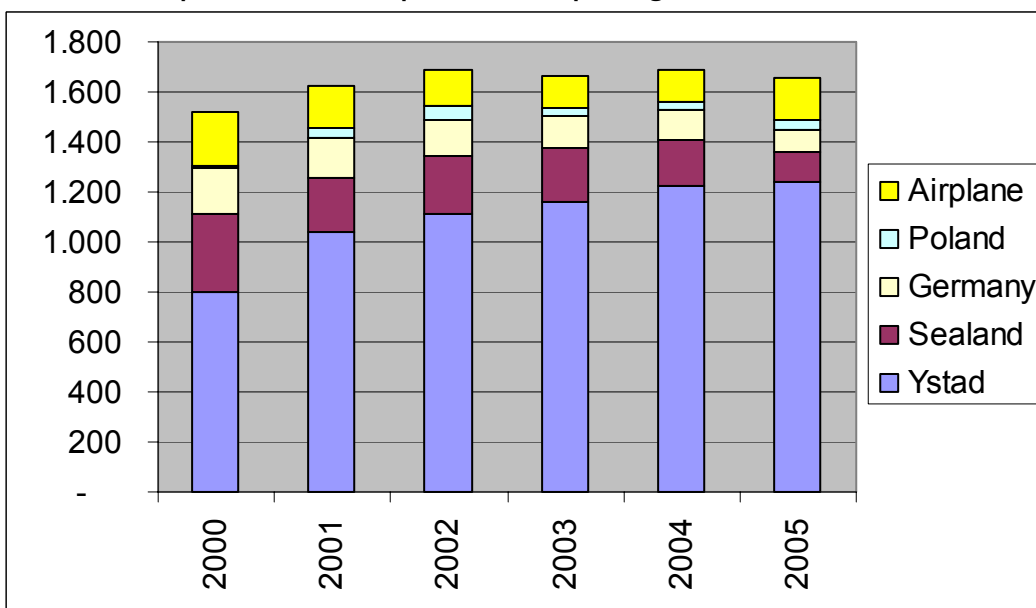
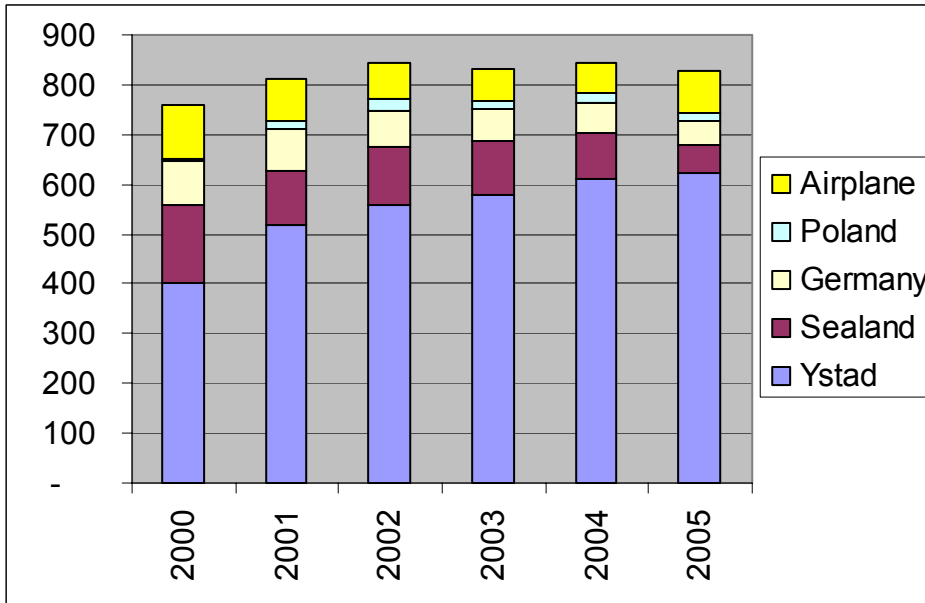


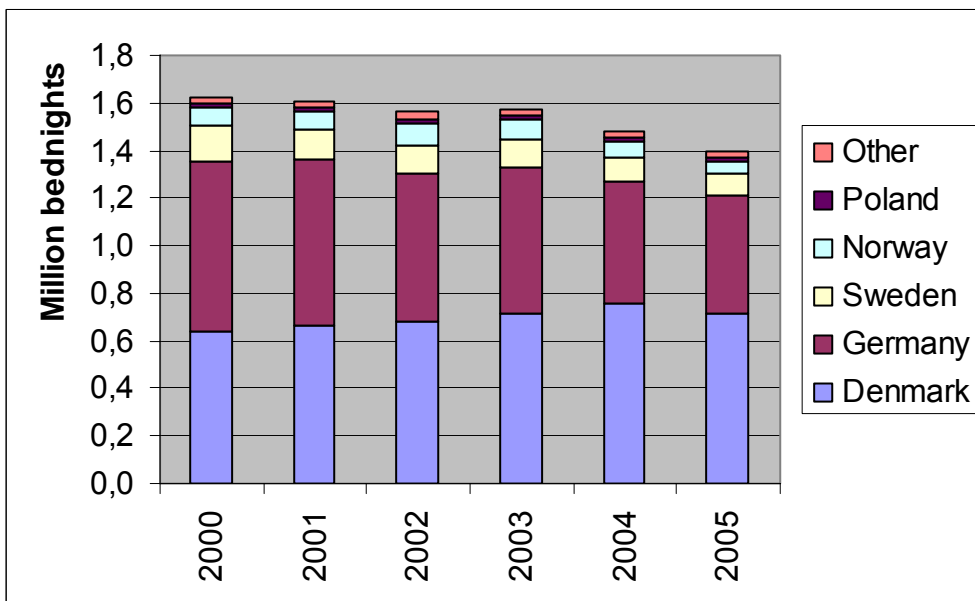
Figure 3 Arrivals to Bornholm per year – 2000-2005: Over 800.000 p.a. since 2001



2.2 Bednight statistics 2000-2005

Between 2000 and 2005 the number of bednights on the Danish island of Bornholm declined from 1,62 million to 1,4 million (corresponding to 200,000 person weeks), according to Statistics Denmark. These do not include those who stay in hotels with less than 40 beds, those who visit friend and relatives and those who stay in their own holiday cottages.

Figure 4 Registered bednights on Bornholm by market, 2000-2005 (all types of accommodation)



The share of Danes has increased, perhaps due to the opening of the Øresund Bridge in the summer of 2000 and the new high speed ferry between Ystad in Sweden and Bornholm at about the same time. On the other hand the share of Germans, Swedes and Norwegians has dropped.

In 2005 Denmark accounted for 51% of the bednights on Bornholm, Germany 36%, Sweden 4%, Norway 4%, Poland 1%, and all other markets 2%. In connection with international flights directly to Bornholm, mainly hotel accommodations are relevant. Hotels plus holiday centres accounted for 33% of the bednights on Bornholm in 2005. 40% of bednights were holiday cottages, 19% camping, 4% youth hostels and 4% sailing boats.

Table 1 Split of the bednights on Bornholm by market and by type of accommodation, 2000-2005

Bornholm	2000	2001	2002	2003	2004	2005
Denmark	39%	42%	43%	45%	51%	51%
Germany	44%	43%	40%	39%	35%	36%
Sweden	9%	8%	8%	8%	7%	6%
Norway	5%	4%	6%	5%	5%	4%
Poland	1%	1%	1%	1%	1%	1%
Other	1%	1%	2%	2%	2%	2%
Bornholm	100%	100%	100%	100%	100%	100%
Mio. nights	1,62	1,61	1,56	1,58	1,48	1,40

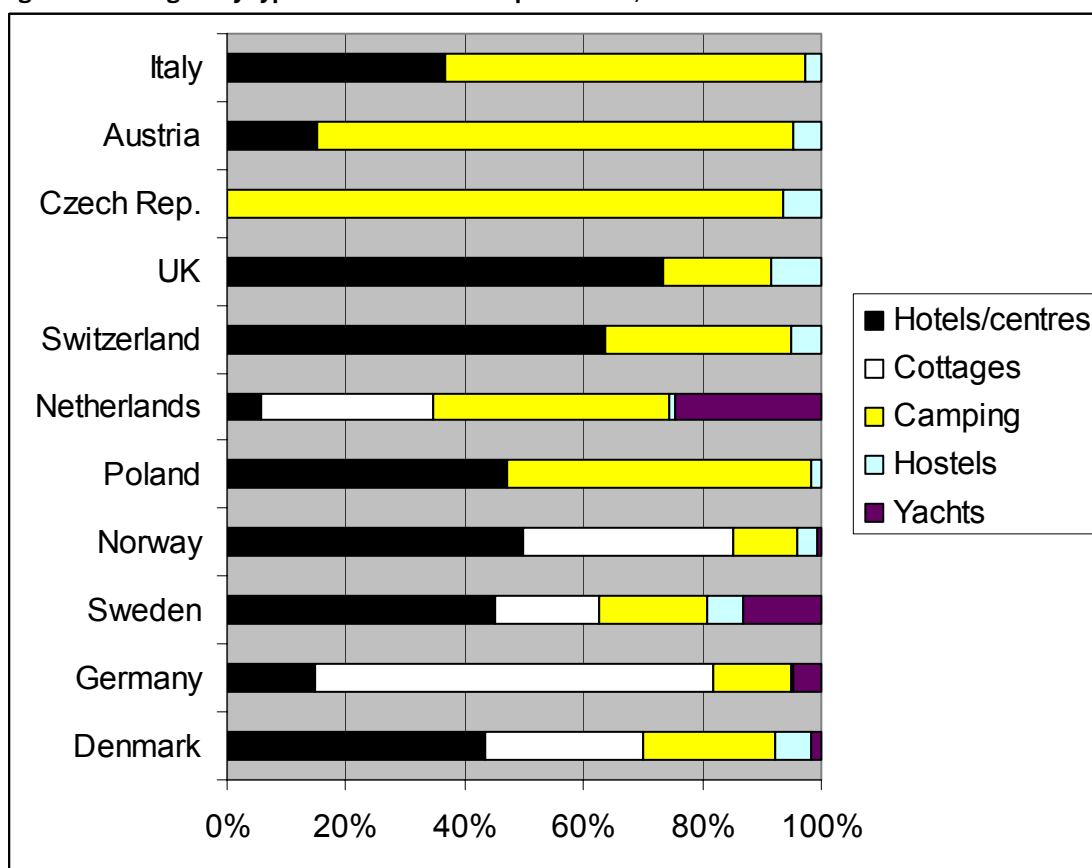
Bornholm	2000	2001	2002	2003	2004	2005
Hotels	21%	20%	21%	20%	20%	18%
Holiday centers	14%	16%	15%	16%	16%	15%
Cottages	39%	40%	39%	39%	40%	40%
Camping	18%	17%	19%	19%	18%	19%
Youth hostels	3%	3%	3%	3%	3%	4%
Sailing boats	4%	4%	3%	3%	3%	4%
Bornholm	100%	100%	100%	100%	100%	100%
Mio. nights	1,62	1,61	1,56	1,58	1,50	1,40

	2000	2001	2002	2003	2004	2005
Hotels	21%	20%	21%	20%	20%	18%
Holiday centers	14%	16%	15%	16%	16%	15%
Hotels/centers	35%	36%	36%	36%	36%	33%

Overall, in 2005, 18% of registered bednights on Bornholm were hotels, 15% holiday centres. Hotels and similar establishments thus accounted for 33% of bednights in 2005 for all nationalities under one. Holiday cottages accounted for 40%, camping 19%, youth hostels 4% and sailing boats 4%.

Hotels (including holiday centres) are the most relevant type of accommodation in connection with flights to Bornholm. However, it cannot be ruled out that some holiday makers (for example the Dutch) would fly to Bornholm, then go bicycling and stay in tents, camping huts or youth hostels.

Figure 5 Bednights by type of accommodation per market, Bornholm 2005



Measured in value of the accommodation services, hotels plus holiday centres are more important than holiday cottages. Hotels plus holiday centres accounted for 57% of the accommodation revenue on Bornholm in 2005, whereas holiday cottages accounted for 33%, camping 7%, youth hostels 3% and sailing boats 1%. Hotels including holiday centres are thus the most important type of accommodation on Bornholm.

Table 2 No. of hotels and holiday centres on Bornholm, room and bed capacity in these (2005)

	Hotels	Centres	Hotels+centres	Max capacity utilisation (July)
Establishments	30	7	37	
Rooms	1.472	514	1.986	70%
Beds	3.232	2.606	5.838	67%

Source: Statistics Denmark.

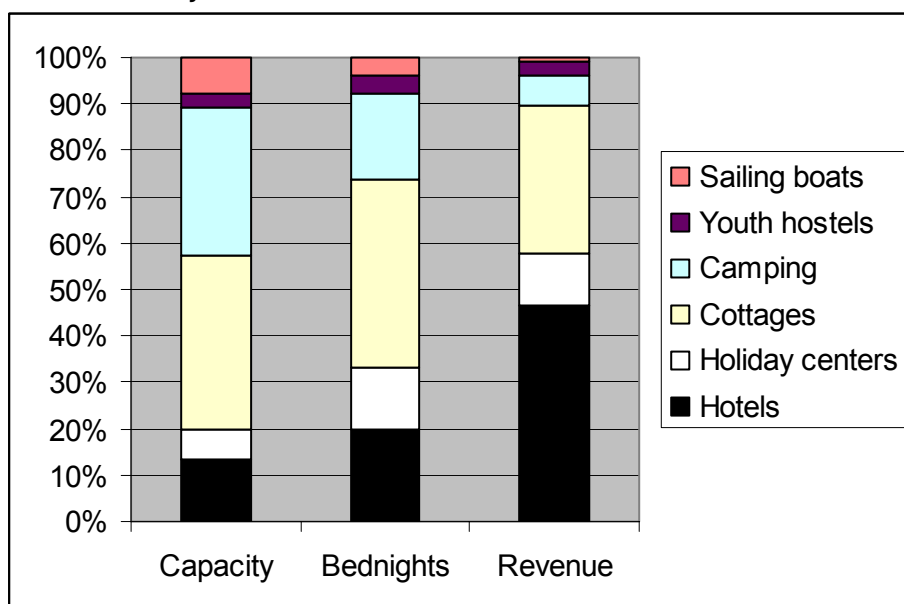
In 2005 there were 30 hotels and 7 holiday centres with at least 40 beds each, as well as a number of small accommodations. There were more than 5800 beds in almost 2000 rooms in the major hotels and holiday centres. In the peak month of July, capacity utilisation for beds in hotels and holiday centres was 67% and measured at the room level, capacity utilisation was 70%. In other words, there were about 600 (namely 604) empty rooms in average for the peak month of July 2005. There were about 1900 empty beds. With just two people in each of the empty rooms, Bornholm could have accommodated up to 1200 people more per night in hotels and holiday centres, even in July in 2005. Theoretically, every week in July 2005 Bornholm could have received over a dozen (specifically up to 24) airplanes with 50 passengers each – or 8 airplanes with 150 passengers each, and all the passengers could have stayed in hotels and holiday centres.

Furthermore, when it comes to the second busiest month, August, in 2005 there would have been rooms and beds for another 500 people every night in hotels and holiday centres.²

So, once a week, all the passengers of at least 10 full airplanes with 50 seats each, or 3 jet planes with up to 180 passengers each can be accommodated in hotels and holiday centres on Bornholm in August (and September, June and May).

After the first three months of 2006, bednights in hotels and holiday centres on Bornholm are up 15% compared to 2005 (based on only 2% of the full year's bednights in hotels etc.), and also there are very positive comments from the cottage letting agencies and camping sites on Bornholm and in the rest of Denmark.

Figure 6 20% of the bed capacity, 33% of bednights but 57% of accommodation revenue on Bornholm were in hotels and holiday centres in 2005



The bednights in hotels on one hand and holiday centres on the other were split rather differently in the different markets. Whereas around 80% of the bednights in hotels and holiday centres are in hotels (20% in centres) for Germans, Swedes, Norwegians and others. Among the Danish tourists to Bornholm, on the other hand, there is an even split between hotels and holiday centres. And Polish tourists tend to stay in holiday centres (87%) rather than hotels (13%).

A week in a holiday centre is considerably cheaper than a week in a hotel. So, for Germans, Swedes and Norwegians, holiday centres can be kept in mind as an alternative to hotels. Indeed, many of the holiday cottage letting agencies have holiday centres in their programmes. This means that they could sell many more holidays in centres to Germans, Swedes and Norwegians, and if international flights are offered sell air inclusive packages, or try to sell a flight in combination with stays in holiday centres. In July, the holiday centres are more full than hotels (especially due to Danes), but in other months such as August, there should be plenty of opportunities to find vacancies in holiday centres, and in hotels as well; see the earlier discussion about capacity utilisation in hotels and holiday centres on Bornholm.

² Since there were 527 fewer registered bednights per night in August 2005 than in July 2005, there was capacity for over 500 more persons per night in August than in July.

Figure 7 Bednights in hotels and in holiday centres on Bornholm by nationality, 2005

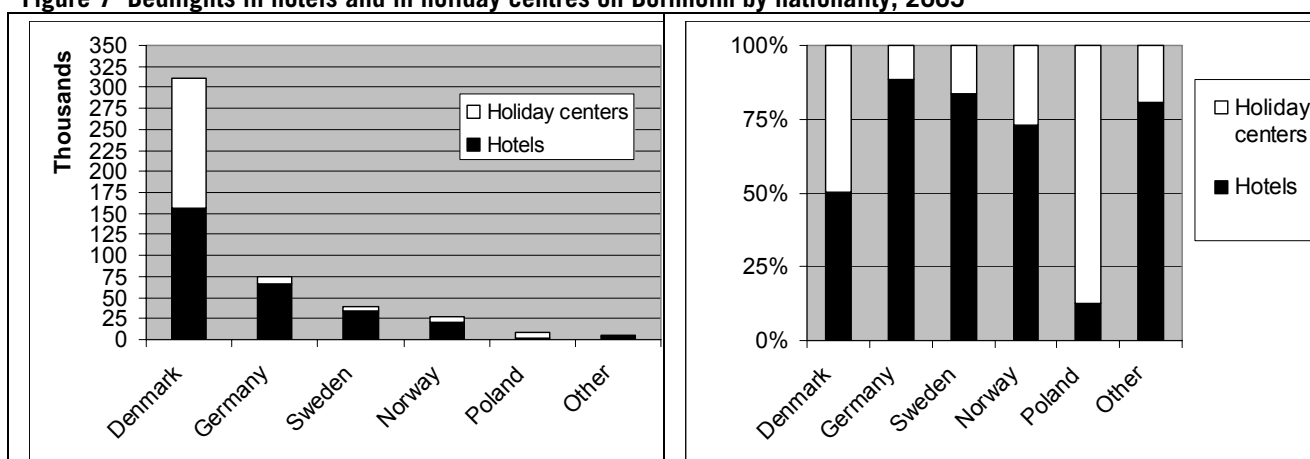


Table 3 Bednights in hotels and in holiday centres on Bornholm by nationality, 2005

	Denmark	Germany	Sweden	Norway	Poland	Other	Bornholm
Hotels	155.868	66.223	33.386	19.692	1.038	3.763	279.970
Holiday centers	155.093	8.523	6.540	7.348	7.144	904	185.552
Bednights	310.961	74.746	39.926	27.040	8.182	4.667	465.522
Person weeks	44.423	10.678	5.704	3.863	1.169	667	66.503
Hotels %	50%	89%	84%	73%	13%	81%	60%

2.3 Details about the most important segments

	Danes - hotels	Germans - hotels	Swedes - hotels	Norwegians - hotels	Top 8 segments	All paying	All non paying
% of bed revenue 2005	26%	11%	5%	3%	88%	100%	
No. in the party	2,2	2,9	3,0	2,5		2,9	2,3
Days on Bornholm	4,2	8,0	4,0	6,0		7,4	6,2
Typical age group	50-59	60-69	50-59	35-49		35-49	35-49
	55	57	55	50		50	46
Share of all respondents, who visited or did the following during this holiday:							
Hammershus Castle	39%	69%	50%	44%		48%	16%
Hammershus Exhibition	13%	18%	8%	28%		15%	3%
Østerlars Round Church	31%	58%	37%	30%		35%	8%
Joboland	3%	2%	2%	16%		9%	5%
Natur Bornholm	17%	43%	18%	35%		25%	6%
Medieval centre	4%	14%	7%	2%		9%	3%
Christiansø	17%	17%	6%	21%		14%	2%
Bornholm Art Museum	13%	15%	16%	7%		12%	5%
Oluf Høst Museum	17%	10%	2%	2%		10%	4%
Bicycle ride	5%	26%	16%	35%		18%	7%
Guided coach tour	16%	25%	17%	16%		8%	1%
Golf	3%	2%	8%	5%		3%	2%
Eating out	48%	39%	76%	70%		50%	24%
Shopping	40%	48%	70%	67%		55%	40%
Importance of various aspects of the choice of Bornholm as a holiday destination, 1=very							
Beaches	2,6	2,2	2,5	2,0		2,3	2,3
Landscape	1,5	1,3	1,6	1,7		1,5	1,7
Cyclepaths	3,1	2,2	2,8	2,0		2,7	2,8
Walk	2,5	2,0	3,0	2,7		2,4	2,5
Fishtowns	1,8	1,7	1,9	2,4		1,8	2,2
Nature	1,5	1,2	1,5	1,7		1,4	1,6
Golf	3,7	3,8	3,6	3,7		3,8	3,7
Fishing	3,6	3,7	3,7	3,6		3,6	3,5
Cultural history	2,1	2,0	2,0	2,2		2,1	2,4
Restaurants	2,4	2,3	1,9	2,2		2,6	2,8
Craft, art workers	2,6	2,2	2,3	2,4		2,5	2,8
Apmosphere	1,6	1,3	1,4	1,5		1,5	1,8
A variety of activities	2,9	2,3	2,7	2,5		2,6	3,0
Family/friends on Bornho	3,1	3,7	3,8	3,6		3,3	1,4
General impression of Bornholm, 1=excellent, 5 =bad:							
as holiday destination	1,3	1,4	1,2	1,5		1,3	1,3
value for money	1,8	2,8	2,1	2,0		2,1	1,9
Number of respondents	286	84	103	43	1.092	1.472	764
Share of 1472 respond.	19%	6%	7%	3%	71%	100%	

Germans – at hotels on Bornholm (11% of the accommodation revenue):

They are typically in the age group 60-69, but with an average age of 57 years. Even so, there are almost 3 persons in average per travel party. The average length of stay is 8 days, which is twice as long as the stay of Danes and Swedes. German hotel guests often visit Hammershus and Østerlars Round Church. Also they visit fee attractions such as Natur Bornholm in Åkirkeby. Rather often they take a guided excursion by bus. There are many things which make this group of tourists visit Bornholm: Nature, landscape, walking paths, craft / art workers, the variety of activities and cycle paths.

Swedes – at hotels on Bornholm (5% of accommodation revenue):

They are typically in the age group 50-59 with an average age of 55. The visit only lasts four days. There are three persons per travel party. Many Swedish hotel guests tend to go to restaurants and shopping and some play golf.

Norwegians – at hotels on Bornholm (3% of accommodation revenue):

They are typically in the age group 35-49 with an average age of 50 years, this is a lower average than hotel guests from other countries. The visit lasts six days. There are 2,5 persons per travel party. Many Norwegian hotel guests go on bicycle rides, as many are relatively young people. They also seem to really like Joboland, the leisure park, probably because rather many bring children, as a lot of them are of a younger age. They also like visiting beaches.

Danes – at hotels on Bornholm (26% of accommodation revenue, not including holiday centres): They are typically in the age group 50-59 with an average age of 55, like the Swedes. The visit only lasts 4,2 days in average. There are only 2,2 persons per travel party in average. This group often go to Christiansø, the little castle island, and visit the Olof Høst Museum (both activities take place from or in Gudhjem).

2.4 Length of stay

The average length of German holiday cottage guests on Bornholm is considerably longer than for other nationalities, namely about 11.3 nights in 2005 vs. 7.2 days for Danes and Swedes.

Survey results (which are from the year 2002, published by CRT in 2003), showed that Germans stayed 12,4 *days* in holiday cottages on Bornholm in average (based on a survey, and therefore not completely certain). From the cottage letting statistics of Statistics Denmark it could be calculated that the average length of stay was actually 11,9 nights. Thus, the survey results were quite close to the actual number of nights stayed by Germans in holiday cottages on Bornholm in 2002. In the survey people were asked about the number of days they stayed on Bornholm. Should the ones that stayed for a week answer 7 or 8 days? If half answered 7 days and the other half 8 days, the average number of nights should be a little lower (actually 0,5 lower) than the average number of nights.

Let us look at Danes staying at holiday cottages on Bornholm: In the survey the average number of DAYS stayed was found to be 9,8. The actual number of NIGHTS Danes stayed in holiday cottages on Bornholm in 2002 was actually just 7,6. Here we cannot explain all of the difference with the fact that one question asked about number of days and the other number of nights. It is possible that some Danes who stayed two weeks rented the cottage privately (not from a cottage letting agency who report the bednights etc. to the statistical authorities). Alternatively, those Danes who took long holidays were simply more willing to participate in the survey than those who took shorter holidays. Anyway, the survey results for Danes staying in holiday cottages on Bornholm were not dramatically different from the official statistics.

The bottom line is that the true length of stay for holiday cottages can be found by subtracting a small amount from the survey results (say 0,5 or so). There is every reason to believe that the differences in length of stay found in the 2002-survey by CRT shows a true picture.

Figure 8 Length of stay by nationality in hotels and other types of accommodation

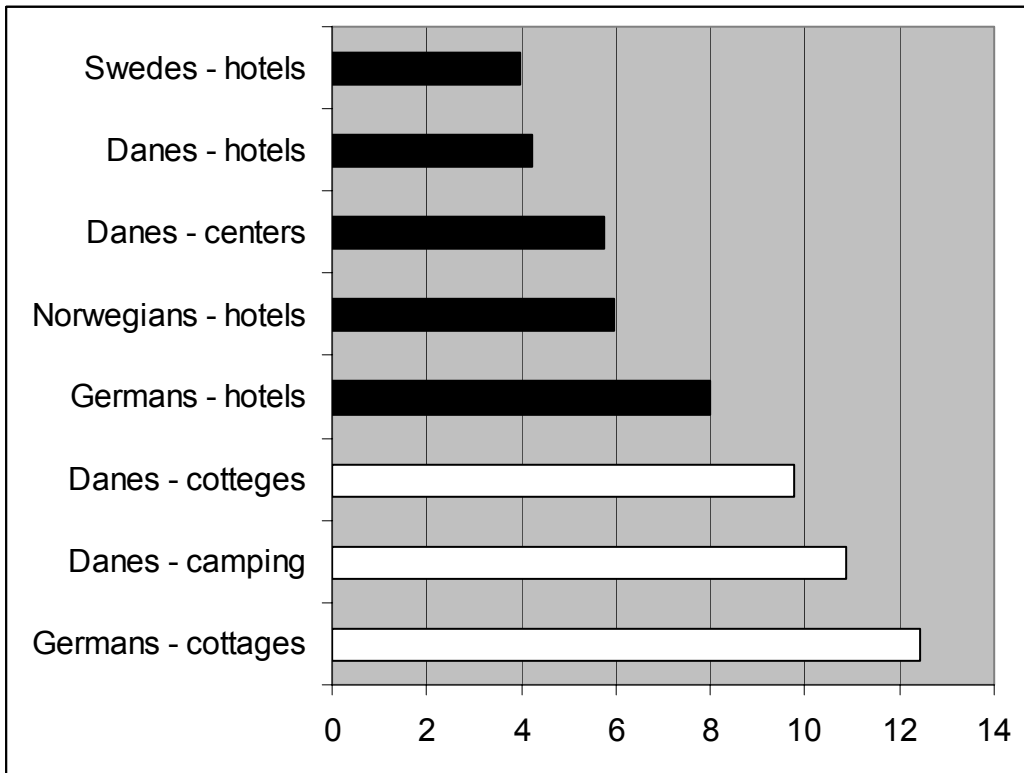
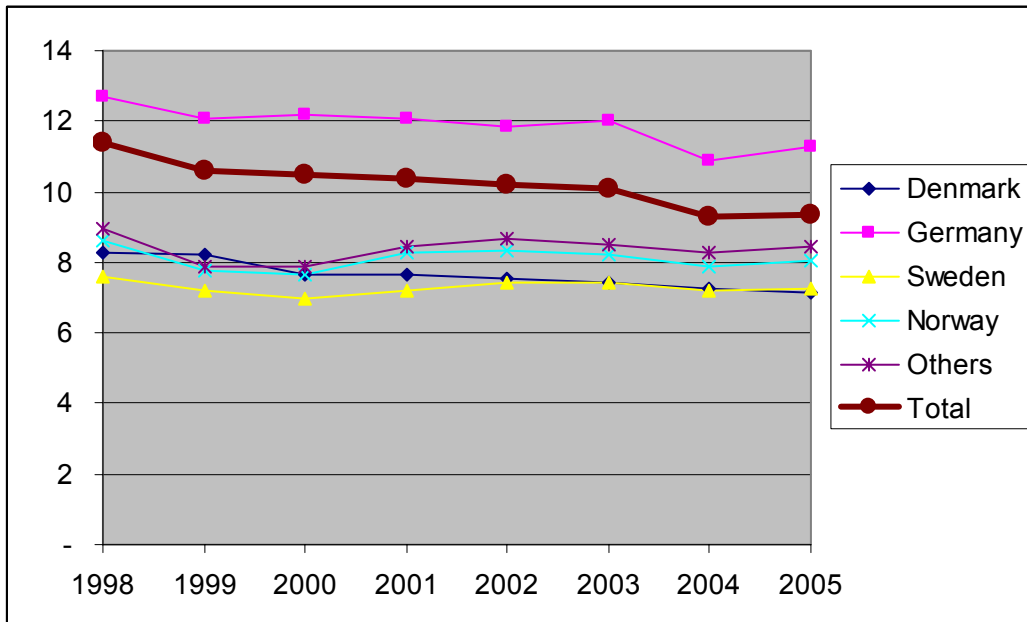


Figure 9 Development in length of stay on Bornholm 1998-2005 (holiday cottages only)



Source: Based on Statistics Denmark.

On 1st July 2000, the Øresund Bridge between Copenhagen and Malmö (in Skåne) opened. At about the same time (15 May 2000) the high speed ferry between Ystad (in Skåne) and Rønne (Bornholm) was put into operation. This reduced the land and sea transport time between Copenhagen and Bornholm by 50%. Danes reduced their length of stay from 1999 to 2000 by half a day. The number of nights stayed at Bornholm

dropped by 1,2 night from 11,4 nights in 1998 to 10,2 nights in 2002, and dropped by further 0,8 night from 2002 to 9,4 nights in 2005, a drop of 2 nights in seven years, corresponding to 18%. This trend is based on holiday cottages only.

In Denmark as a whole the drop in length of stay was not quite as significant. There was a drop of 0,7 nights per person from 10,2 nights in 1998 to 9,5 nights in 2002. There was a further drop of 0,5 nights to the average of 8,9 nights per person in 2005. This corresponds to a drop of 12% in seven years.

2.5 Seasonality

49% of bednights in hotels and holiday centres on Bornholm is spent in July and August. Another 41% is spent in May, June and September. These five months thus account for 80% of the bednights in hotels and holiday centres on Bornholm. International flights to Bornholm should be limited to the period from May to September (inclusive). For individual markets the appropriate flying season may be shorter than the full five months.

Figure 10 All guests at hotels etc. on Bornholm – All information requests – by month

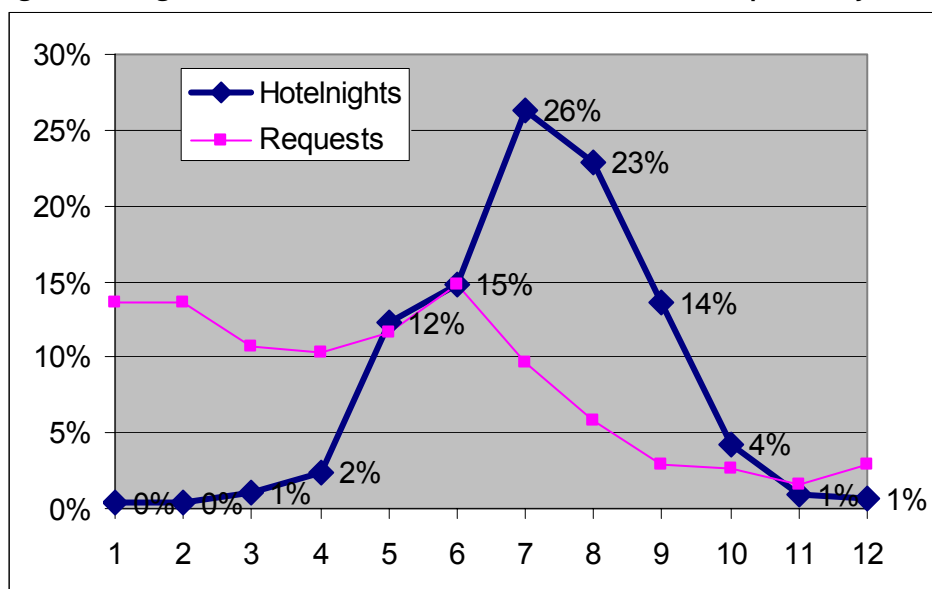
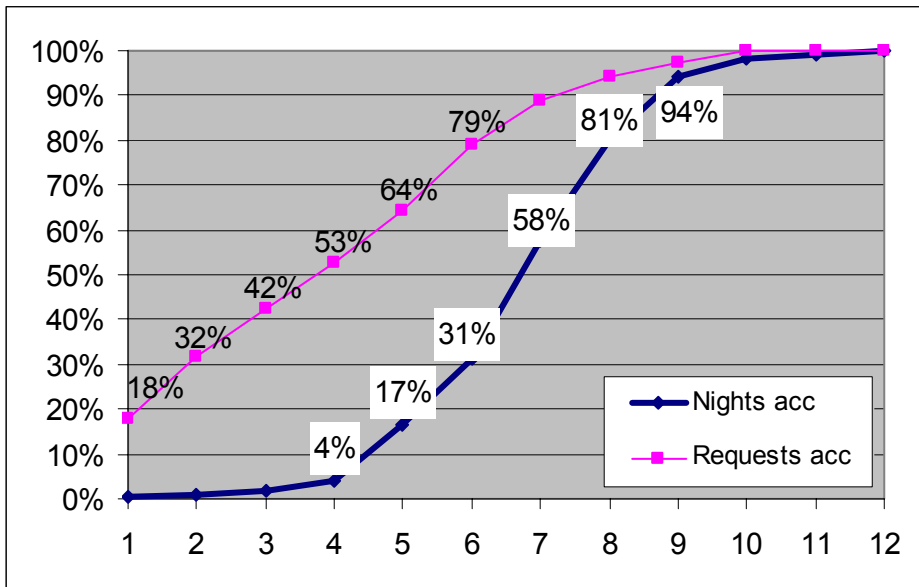


Figure 11 All guests at hotels etc. on Bornholm – All information requests by month – accumulated



Note: January (accumulated) includes November and December from the previous year.

It is clear from the diagram above that starting marketing activities much later than January would have serious consequences. By the end of April potential visitors have already collected more than half of any relevant information for the upcoming season.

The peak season for each nationality is as follows:

Denmark: 25% in July
 Sweden: 35% in July
 Switzerland: 42% in July
 France: 50% in July
 Norway: 55% in July
 Finland: 67% in July
 Iceland: 85% in July
 Spain: 87% in July

Germany: 27% in August
 Belgium: 52% in August
 Netherlands: 57% in August
 British: 57% in August
 Poland: 68% in August
 Italy: 59% in August
 Slovakia: 91% in August

USA: 28% in June

Overall: 26% in July and 23% in August

Table 4 Season for hotels and holiday centres on Bornholm by nationality, 2005

	1	2	3	4	5	6	7	8	9	10	11	12	Nights	Weeks	2005
Denmark	1%	1%	1%	3%	13%	13%	25%	21%	15%	6%	1%	1%	310.006	44.287	67%
Germany	0%	0%	0%	1%	15%	19%	20%	27%	18%	1%	0%	0%	74.738	10.677	16%
Sweden	0%	0%	0%	2%	13%	15%	35%	25%	7%	3%	0%	0%	39.061	5.580	8%
Norway	0%	0%	0%	0%	2%	24%	55%	17%	2%	0%	0%	0%	26.648	3.807	6%
Poland	0%	0%	0%	0%	0%	8%	19%	68%	4%	0%	0%	0%	8.180	1.169	2%
Switzerland	0%	0%	0%	1%	3%	11%	42%	26%	17%	0%	0%	0%	987	141	0,2%
UK	0%	0%	4%	0%	9%	12%	16%	51%	6%	2%	0%	0%	690	99	0,1%
Netherlands	8%	0%	0%	0%	1%	11%	12%	57%	8%	1%	0%	0%	403	58	0,1%
USA	1%	1%	3%	0%	4%	28%	26%	15%	13%	1%	1%	6%	357	51	0,1%
Spain	0%	0%	0%	0%	4%	0%	89%	5%	2%	1%	0%	0%	321	46	0,1%
Slovakia	0%	0%	0%	7%	0%	0%	0%	91%	1%	1%	0%	0%	309	44	0,1%
Italy	3%	0%	0%	0%	1%	2%	29%	59%	3%	0%	0%	2%	181	26	0,04%
France	18%	8%	0%	0%	4%	5%	50%	9%	2%	1%	0%	3%	174	25	0,04%
Finland	0%	0%	0%	0%	2%	10%	67%	11%	9%	0%	1%	0%	165	24	0,04%
Iceland	0%	0%	0%	0%	2%	85%	0%	0%	3%	8%	3%	0%	142	20	0,03%
Belgium	0%	5%	3%	0%	8%	17%	6%	52%	2%	2%	6%	0%	104	15	0,02%
Austria	4%	18%	3%	0%	0%	15%	34%	20%	5%	0%	0%	0%	98	14	0,02%
Others	1%	0%	1%	0%	20%	11%	17%	27%	12%	9%	1%	0%	714	102	0,15%
All markets	0%	0%	1%	2%	12%	15%	26%	23%	14%	4%	1%	1%	463.278	66.183	100%

Source: Based on bednights reported to Statistics Denmark.

The above is true for all types of accommodation (including hotels) both in Bornholm and in Denmark overall. However, there is greater seasonal fluctuation in the island of Bornholm than in Denmark as a whole.

2.6 Where do those interested in visiting Bornholm come from?

Several airlines have independently from each other asked the question: where do tourists come from, and more specifically from where within their country of origin?

In order to answer that question an analysis of the information requests sent to Destination Bornholm, the general tourist marketing company of the island, in 2005. This has been done both across and within markets. We shall first look at the number of requests by country, and compare with the number of bednights by country. In the following chapters we shall then make a geographic analysis of the request within each market.

In total more than 21,000 information requests were received by Destination Bornholm in 2005, from people interested in visiting Bornholm. There is a good correspondence between the number of information requests and the number of bednights, when comparing how each of these measures are split. There are some differences which shall be commented upon.

Below it is shown how the number of information requests is split between each market. This is shown along with the number of bednights in hotels plus holiday centres. The five largest markets account for 94% of the information requests, and they account for over 99% of the actually bednights on Bornholm, cf. below.

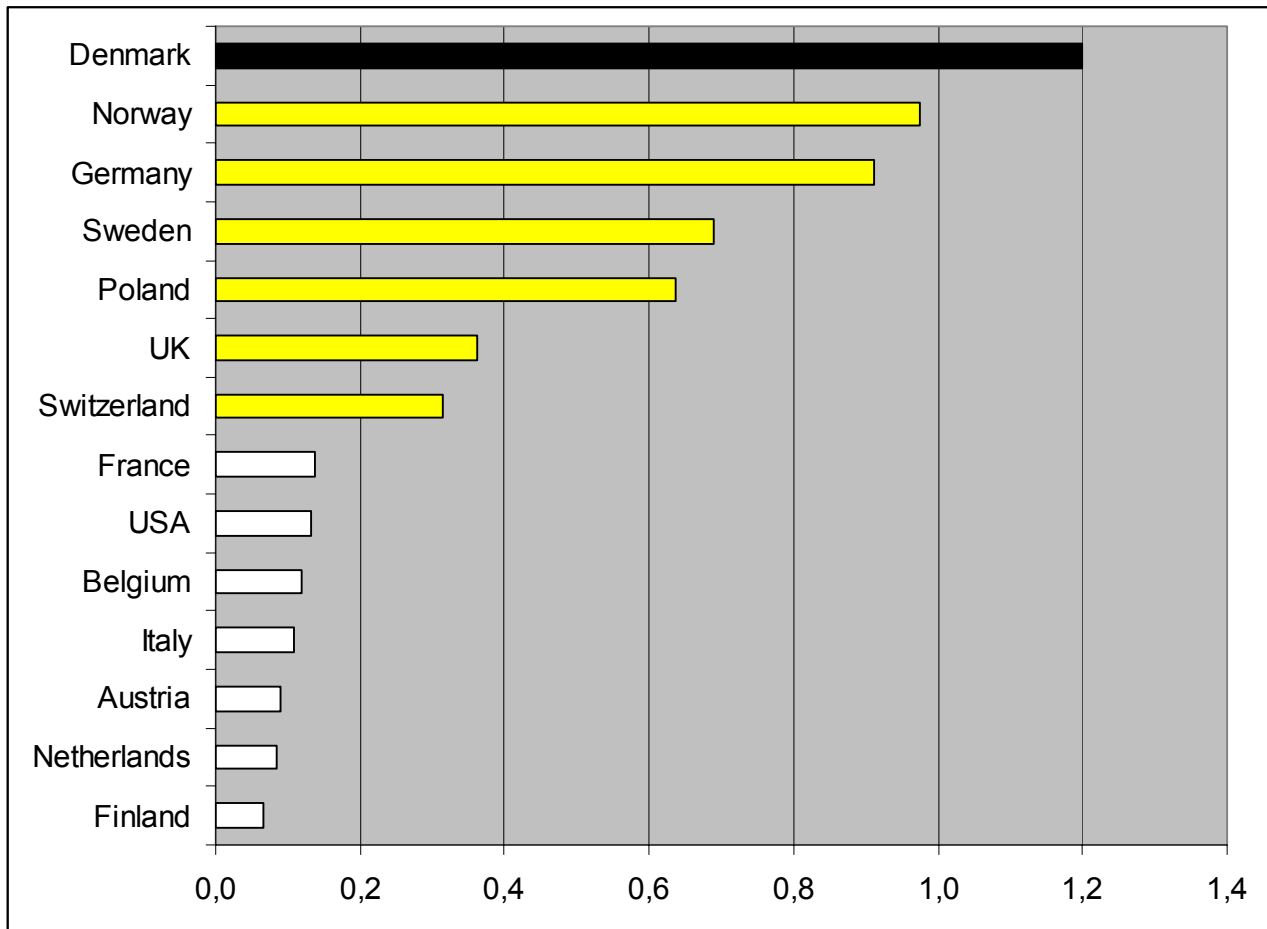
Table 5 Information requests and bednights in hotels and holiday centres on Bornholm by market

Marked	Requests	Requests%	Hotelnights	Hotelnights
1 Denmark	11.832	56%	310.006	67%
2 Germany	3.749	18%	74.738	16%
3 Sweden	2.596	12%	39.061	8%
4 Norway	1.250	6%	26.648	6%
5 Poland	588	3%	8.180	2%
6 Netherlands	216	1%	403	0,09%
7 Switzerland	144	1%	987	0,21%
8 USA	123	1%	357	0,08%
9 Finland	115	1%	165	0,04%
10 UK	87	0%	690	0,15%
11 Italy	76	0%	181	0,04%
12 France	58	0%	174	0,04%
13 Austria	50	0%	98	0,02%
14 Belgium	40	0%	104	0,02%
Others	282	1%	1.486	0,32%
Total	21.206	100%	463.278	100%
Top 5	20.015	94%	458.633	99%
Others: New	1.191	6%	4.645	1%

Travel time (or distance, or travel costs) determines to what extent an interest in visiting Bornholm actually materialises into bednights, here defined as hotel bednights (including holiday centres). Therefore, if travel time can be reduced – by opening direct routes from different European cities directly to Bornholm, then an interest in visiting Bornholm is more likely to result in actual visits (and hotelnights).

Finns have the longest travel time to Bornholm of all. It is faster to fly from New York, with change of flight in Copenhagen, than to travel by surface transport from Helsinki to Bornholm. The opposite is true for Danes, Norwegians, Germans and Swedes: The travel time is short to medium, and the interest in visiting Bornholm tend to materialise in actual visits. In a recent email survey among those requesting information from Destination Bornholm in 2004 it was found that 78% (primarily *Danish* respondents) actually visited Bornholm in 2004. The Danish market is the black bar in below graph, where the share of actual hotel bednights on Bornholm in 2005 is put in relation to share of information requests sent to Destination Bornholm in 2005.

Figure 12 Do those who show interest in Bornholm actually show up? – Danes and some others do (short-medium travel time), Finns don't (too long travel time)



Note: The graph shows percentage of hotelnights per country divided by percentage of information requests per country.

An advertising campaign to make Finns travel some 19 hours to Bornholm would be destined to fail. But if a direct 2 hour flight was established, they may come.

It may be shown that the longer travel time in hours, the less likely people are likely to come, even if they have shown interest in coming.

Figure 13 Those with long travel time don't come, even if they are interested in Bornholm

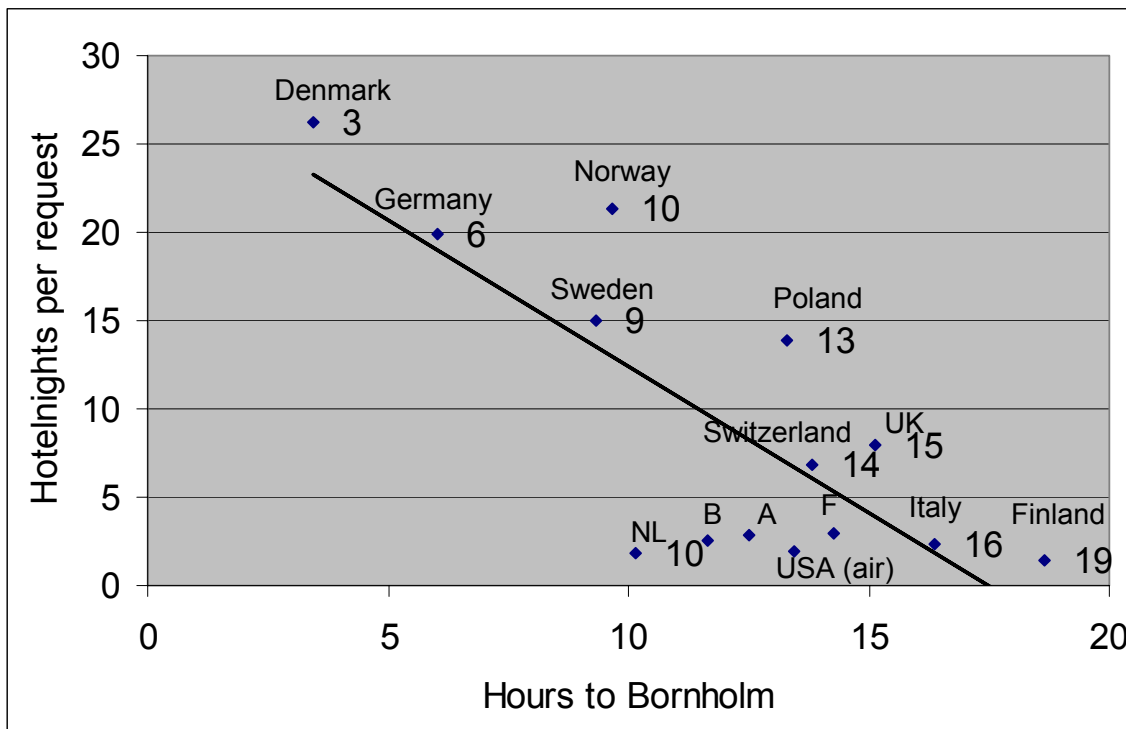


Table 6 Travel time to Bornholm is an important factor, when interest in visiting Bornholm should be converted to actual visits

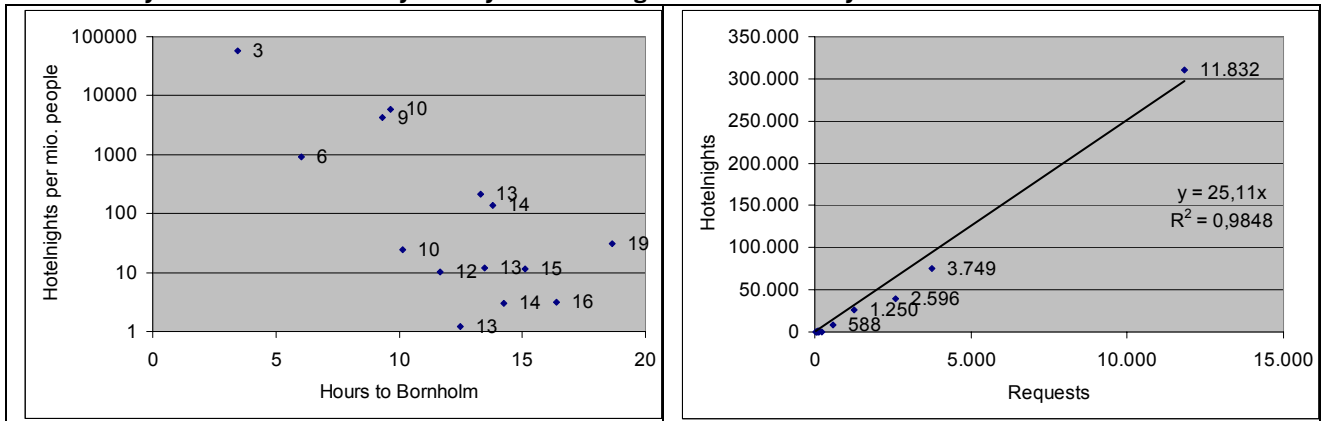
From:		Hours to	Nights per
Country	City	Bornholm	request
Denmark	Copenhagen	3	26
Germany	Berlin	6	20
Sweden	Stockholm	9	15
Norway	Oslo	10	21
Netherlands	Amsterdam	10	2
Belgium	Brussels	12	3
USA (by air)	New York	13	3
Poland	Warsaw	13	14
Austria	Vienna	13	2
Switzerland	Zürich	14	7
France	Paris	14	3
UK	London	15	8
Italy	Milano	16	2
Finland	Helsinki	19	1

The above travel times are based on viamichelin.com, but are optimistic. The ferry Sassnitz-Rønne takes 3½ hours, plus waiting time. Berlin-Sassnitz takes 3 hours 15 minutes for the 306 km! – Minimum meeting time at check-in is 15 minutes. So, one hour could be added to Berlin and all other countries to the south or west using the route. Furthermore, reserved ticket must be picked up no later than one hour before departure. Plus it would be impossible to plan the trip so that arrival is exactly on time. On this basis another hour must frequently be added. Also for Germans interested in visiting Bornholm, the typical distance to the ferry is not only 306 km like for those living in Berlin, but over 240 km longer (i.e. 550 km), so that is at least another couple of hours of travel time for Germans in general going by car and ferry to Bornholm.

The Dutch do come to Bornholm, but tend to stay at camping sites rather than hotels.³ If travel time is reduced from 10 hours to 5 hours (without increasing travel costs too much), then the tendency for interest in visiting Bornholm to translate into actual visits and hotelnights would obviously increase.⁴

In summary: Direct flights to Bornholm at competitive prices will result in more hotel guest.

Figure 14 a: The fewer hours of travel to Bornholm, the more hotelnights per million people. b: Info requests about Bornholm by market correlates very closely with hotelnights on Bornholm by market.



³ Only a small percentage (6%) of the Dutch stay in hotels, when they visit Bornholm. But here we focus on hotels and holiday centres, which are the central types of accommodation in connection with flights.

⁴ A regression analysis, fitting a line through the above dots, could give a specific estimate ($Y = -1,66x + 29$, $R^2=0,61$). A reduction in travel time from 9 hours (as for Sweden) to 4 hours, i.e. a reduction of 56%, would result in an increase in the nights per request of 55%, and thereby an increase in hotel bednights of 55%, provided it would not be more expensive per person to fly than to drive and go by ferry. The increase does not apply to all Swedes, but only to those living in the catchment area. 22% of Swedes interested in visiting Bornholm come from there counties around the Stockholm Arlanda Airport, and lets say that only a third of those would consider flying. In 2005 there were 39.061 Swedish hotel nights on Bornholm. A 55% increase would be 21.547 nights or 3078 person weeks. A third of 22% of that is 221 person weeks. It would require 6 round trips by a 50 seat plane, with a load factor of 74% to bring those people from Stockholm to Bornholm and back.

3. Germany

Back in 1998 there were more than twice as many passengers on the ferry line between Germany (Sassnitz) and Bornholm than in 2005. Whatever happened? Many things: An economic downturn in Germany, a reduction in the number of ferry operators from two to one. And in 2005 there was a change of ferry operator, a change of ship, a reduction in the sailing season and a change in the schedules to less attractive departure times from Germany.

From 2004 to 2005 the number of Germans arriving to Bornholm (by the ferry from Sassnitz) dropped by 15.000 or 25% from 61.000 to 46.000. From the holiday cottage statistics we know that there was a drop of 11.400 persons in that type of accommodation, from 31.200 in 2004 to 19.800 in 2005, which means that holiday cottages accounted for most of the drop. Since there were 29.500 Germans staying 1,6 weeks in average in holiday cottages at Bornholm in 2005 (cf. enclosure 2), this means that there were at least 16.500 Germans staying in other types of accommodation (plus yachs – and plus a few thousands of Germans who travel via Ystad to Bornholm). Germans who stay at camping places stay close to two weeks in average, whereas those who stay in hotel stay 6 days (5-6 nights) and those who stay in holiday centres one week, or marginally longer. Around 10.000 Germans stayed (10.700 weeks) in hotels and holiday centres on Bornholm in 2005. Around 5.000 stayed (9.400 weeks) at camping sites. As mentioned, 29.500 Germans stayed (47.600 weeks) in holiday cottages, and maybe 500 stayed (319 weeks) in youth hostels).

Figure 15 Number of passengers on the ferry route Sassnitz-Bornholm 1998-2005

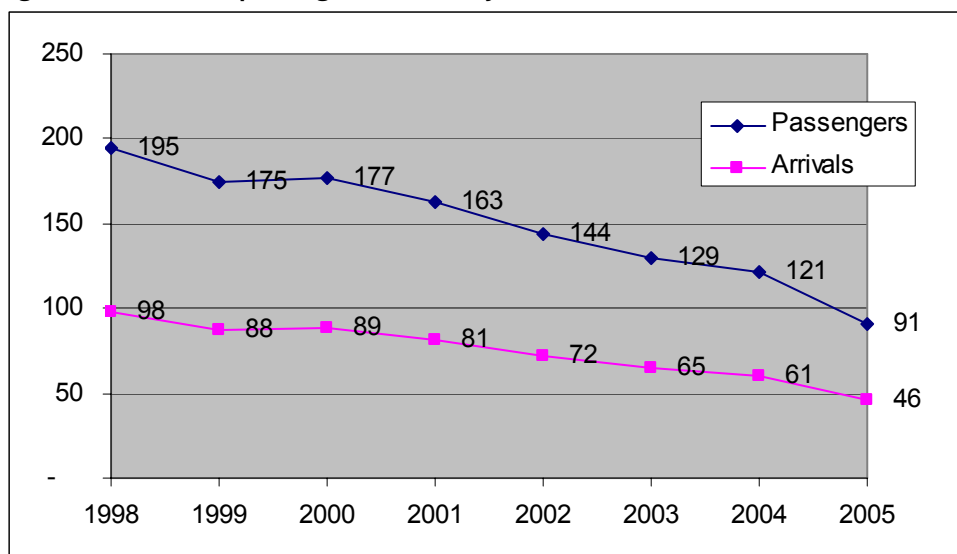


Table 7 Bednights for Germans staying at Bornholm, 2000-2005

Germany	2000	2001	2002	2003	2004	2005	Weeks '05	2005%
Hotels	101.468	102.984	85.786	81.550	68.366	66.223	9.460	13%
Holiday centers	37.043	33.480	26.178	26.362	16.092	8.523	1.218	2%
Cottages	451.000	436.000	409.000	396.000	364.000	333.000	47.571	67%
Camping	95.504	89.843	78.947	80.018	58.786	65.612	9.373	13%
Youth hostels	3.587	2.861	2.726	2.580	1.554	2.232	319	0%
Sailing boats	27.184	27.185	22.776	23.310	20.488	23.780	3.397	5%
Bornholm	715.786	692.353	625.413	609.820	529.286	499.370	71.339	100%

Table 8 10.500 Germans stayed in hotels and holiday centres on Bornholm in 2005

Germany	Nights '05	Weeks '05	Ave. nights	Ave. weeks	Persons
Hotels	66.223	9.460	7,0	1,0	9.460
Holiday centers	8.523	1.218	8,0	1,1	1.065
Cottages	333.000	47.571	11,3	1,61	29.500
Camping	65.612	9.373	13,3	1,9	4.916
Youth hostels	2.232	319	4,0	0,6	558
Yachts	23.780	3.397			Ex. yachts
Bornholm	499.370	71.339	11,0	1,57	45.500
Hotels+centers	74.746	10.678	7,1	1,0	10.526

There are 16 states in Germany. Below there is an analysis of how the people from Germany have shown an interest coming to Bornholm, based on about 3749 information requests sent to Destination Bornholm in 2005. There is a great overlap of people who request information about Bornholm and those who have actually visited Bornholm: 78% of those who requested information (back in 2004) had actually visited Bornholm based on a survey undertaken in 2005. This high percentage is for Danes. The percentage is lower for other countries. However, within a country, for example Germany, the assumption that is made here is that those who actually visit Bornholm or have been to Bornholm before, is distributed in the same way as those who do not visit Bornholm.

Figure 16 Map of the 16 states in Germany – and the main cities of Germany

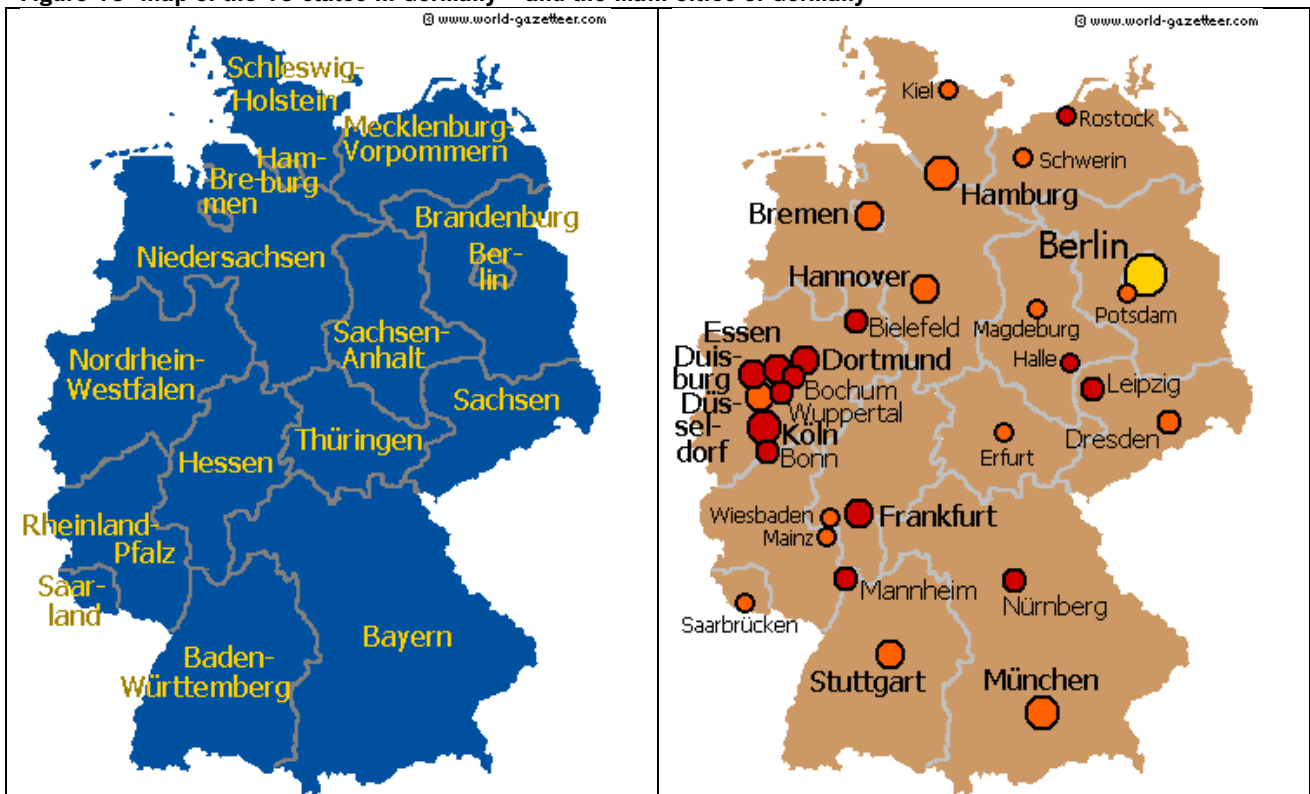


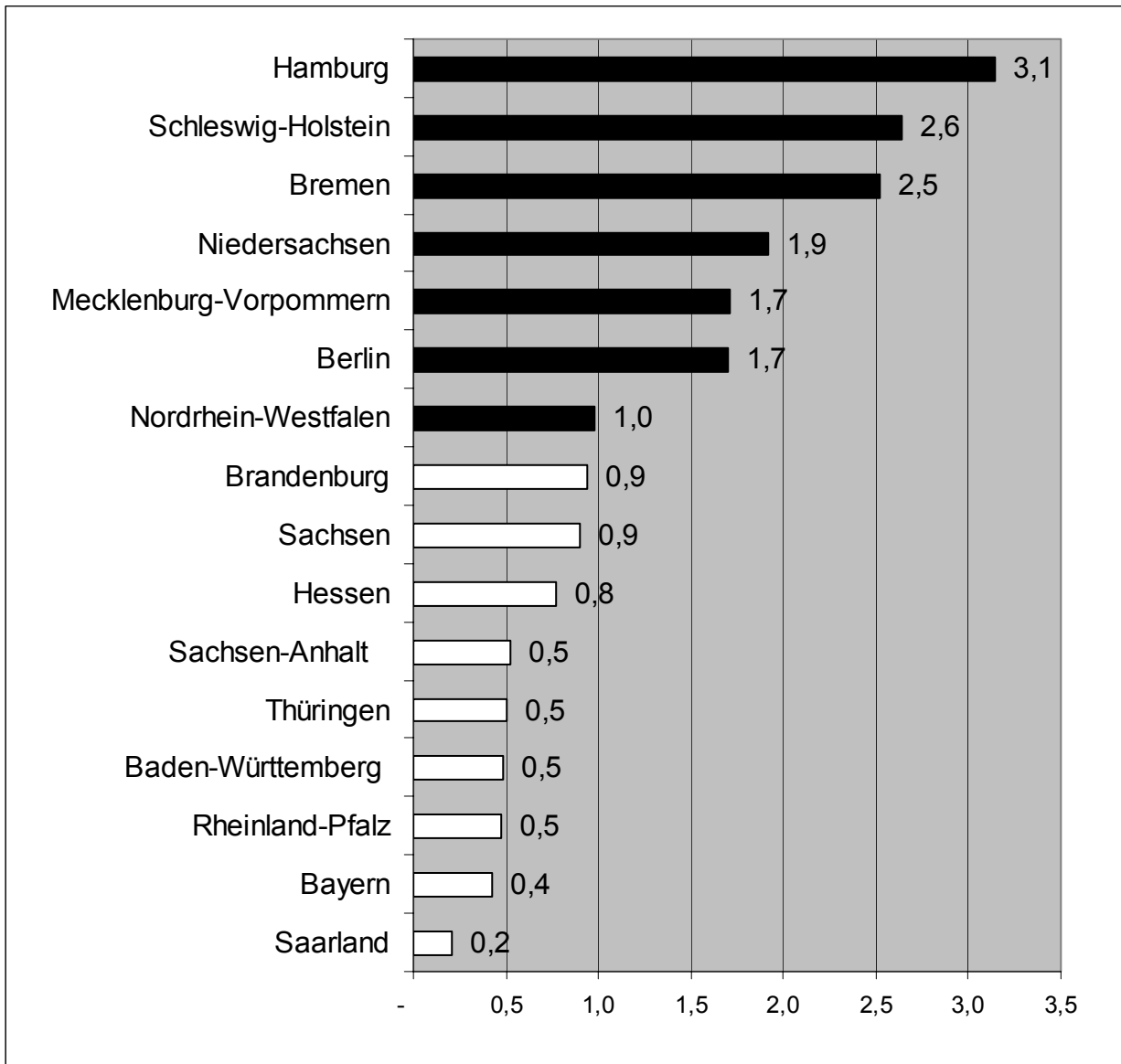
Table 9 Summary of analysis of Germany

State in Germany	Population	Percent of population	Info. requests	Percent of requests	Relative position	Km from ferry
1 Schleswig-Holstein	2.823.000	3%	339	9%	2,6	341
2 Hamburg	1.737.000	2%	248	7%	3,1	327
3 Bremen	662.990	1%	76	2%	2,5	439
4 Mecklenburg-Vorpommern	1.726.000	2%	134	4%	1,7	124
5 Berlin	3.390.444	4%	262	7%	1,7	309
6 Brandenburg	2.567.704	3%	110	3%	0,9	312
7 Niedersachsen	8.000.909	10%	698	19%	1,9	474
8 Sachsen-Anhalt	2.523.000	3%	60	2%	0,5	453
9 Nordrhein-Westfalen	18.075.352	22%	807	22%	1,0	720
10 Hessen	6.097.800	7%	213	6%	0,8	624
11 Thüringen	2.355.280	3%	54	1%	0,5	582
12 Sachsen	4.288.796	5%	176	5%	0,9	509
13 Rheinland-Pfalz	4.059.000	5%	87	2%	0,5	838
14 Saarland	1.057.502	1%	10	0%	0,2	986
15 Bayern	12.444.000	15%	240	6%	0,4	886
16 Baden-Württemberg	10.717.419	13%	235	6%	0,5	912
Total (Germany)	82.526.196	100%	3.749	100%	1,0	551

Note: Based on 3749 information requests from Germans sent to Destination Bornholm in 2005.

The typical distance from the ferry (551 km) has been calculated using the % of requests as weight.

Figure 17 Relative strong position of Bornholm in 6 of 16 states in Germany - 2005



The states with the largest percent of visitors to Bornholm 2005 were the following:

- **Nordrhein-Westfalen** 22%
- **Niedersachsen** 19%
- **Schleswig-Holstein** 9%
- **Berlin** 7%
- **Hamburg** 7%

Combined these 5 states accounted for 63% of the visitors.

On top of these comes Bremen with 2% (cf. below).

In Hamburg, Schleswig-Holstein, **Bremen**, Niedersachsen, **Mecklenburg-Vorpommern** and Berlin, there is relatively high interest in going to Bornholm.

In an airtravel context Mecklenburg-Vorpommern is probably too close to Rügen, from where the ferry to Bornholm departs.

28% of the population comes from Bavaria (Bayern) and Baden-Württemberg, but only 12% of current visitors to Bornholm (or people interested in visiting Bornholm) come from these wealthy states. Whether the establishment of an airline route even from southern Germany could make people go to Bornholm would probably take the experience of an airline to decide.

3.1 Seasonality – Germany

Figure 18 Hotel guests on Bornholm and information requests by month (2005) – Germans

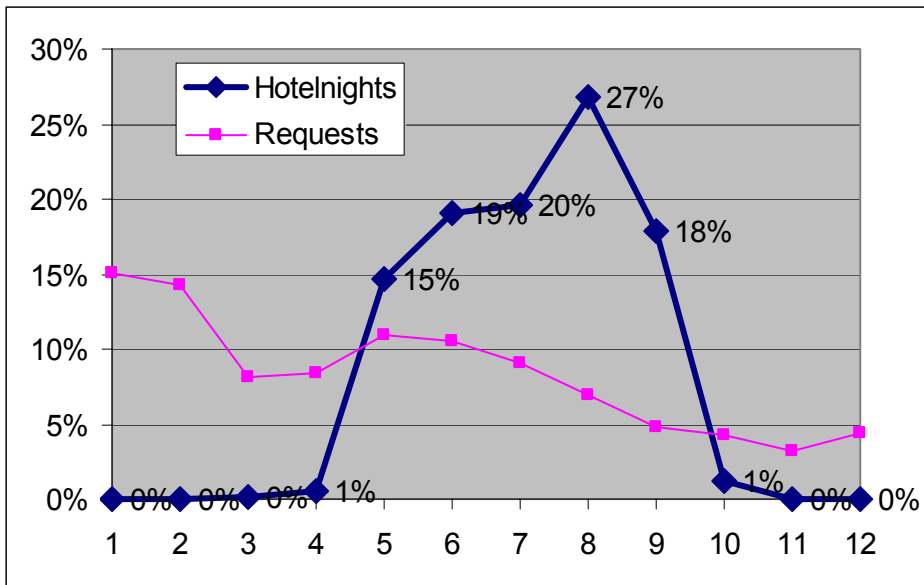
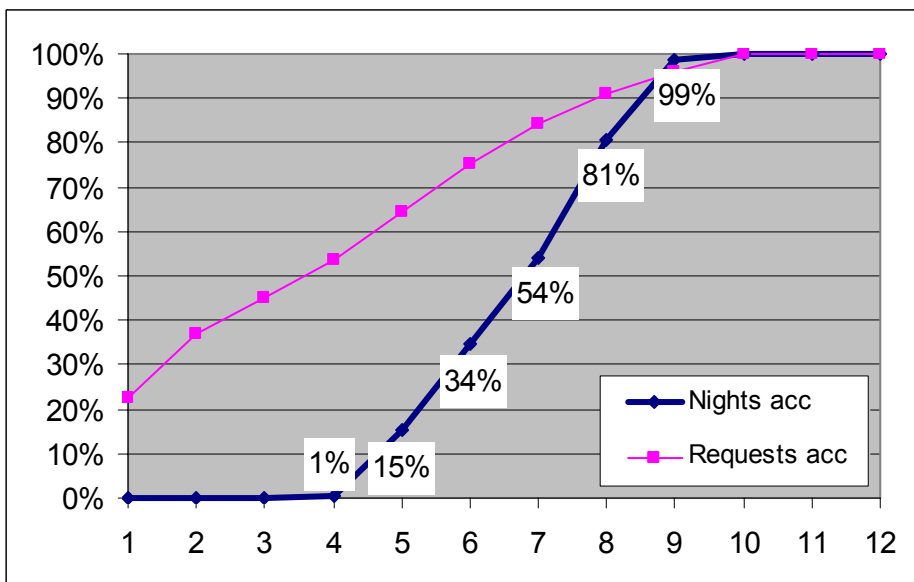


Figure 19 Hotel guests on Bornholm and information requests by month accumulated – Germans



Note: January (accumulated) includes November and December from the previous year.

3.2 Case: Seasonal Flights to Sylt from Germany

According to the flights schedules of Sylt Airport, combined with information about the passenger seat capacity of the different airlines, the outbound capacity from airports in Germany to Sylt for per week during 2006 is as shown in the below table. For example, Air Berlin flies from Berlin/Tegel and Düsseldorf three times a week from each city by a Airbus A320 for 180 passengers etc..

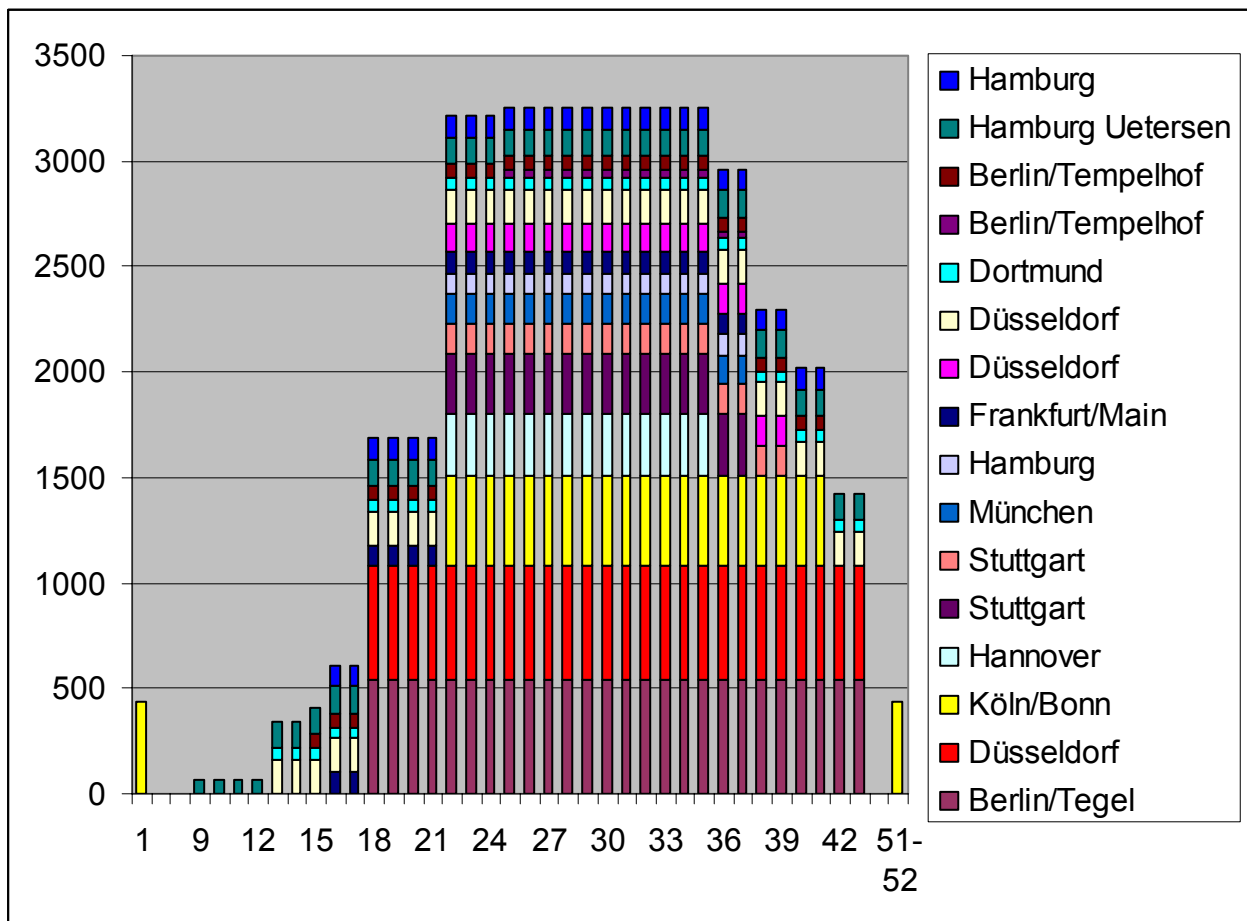
Table 10 Airlines serving Sylt Airport 2006: Which airports, airplanes, rounds per week, period, seats

Code	Airline	From, airports	Airplane type	Pass. seats	Rounds per week	From	To	Weeks	Seats, inbound
AB	Air Berlin	Berlin/Tegel	A320	180	3	2 May	31 Oct.	26	14.040
AB	Air Berlin	Düsseldorf	A320	180	3	2 May	31 Oct.	26	14.040
X3	HLX	Cologne	Boing 737	144	3	2 June	15 Oct.+X	22	9.504
X3	HLX	Hannover	Boing 737	144	2	3 June	2 Sep.	14	4.032
X3	HLX	Stuttgart	Boing 737	144	2	29 May	18 Sep.	16	4.608
LH	LH by Contact Air	Stuttgart	ATR 72-500	70	2	3 June	3 Oct.	18	2.520
LH	Lufthansa CityLine	München	CRJ 700	70	2	28 May	17 Sep.	16	2.240
LH	Lufthansa CityLine	Hamburg	CRJ 100/200	50	2	2 June	17 Sep.	16	1.600
LH	LH by Augsburg Air	Frankfurt	Dash 8 300	50	2	9/29 Apr.	17 Sep.	22	2.200
LH	LH by Contact Air	Düsseldorf	ATR42-500	46	3	3 June	1 Oct.	18	2.484
HE	LGW	Düsseldorf	do.	18	9	25 Mar.	29 Oct.	31	5.022
HE	LGW	Dortmund	do.	18	3	25 Mar.	29 Oct.	31	1.674
HE	LGW	Berlin/Temp.	Dornier 228	18	2	23 June	18 Sep.	13	468
C9	Cirrus Airlines	Berlin/Temp.	Dornier 328	33	2	14 Apr.	14 Oct.	27	1.782
HH	Air Hamburg	Hamburg Uet.	Cessna	6	21	1.3,1.4	31 Oct.	33	4.158
7E	Sylt Air	Hamburg	Cessna	6	17	10.4,1.6	15 Oct.	26	2.652
16 routes by 7 airlines (including Lufthansa Regional with LH CityLine and two other partners) . In:									73.024

Source: Based on www.flughafen-sylt.de/scripts/flugplan-pdf.php?cl=pdf, combined with information about airplane types used on each route.

Obviously, several of the above airlines would be candidates for flying to Bornholm, from the same airports, preferably using airplanes with at least 46 seats.

Figure 20 Outbound seat capacity per week from the different airports in Germany to Sylt (2006)



For comparison with the above, it may be noted that on the ferry route from Sassnitz to Rønne, Bornholm, the capacity per week, exclusively calculated as the maximum number of passengers traveling by passenger cars (up to 4 in each) is as follows. A ropax ferry can take up to 400 passengers, i.e. 100 cars with 4 passengers in each. The conventional ferry can take 262 cars, and with 4 passengers per car that makes up to 1048 passengers.

On Sylt the flying season ends by the end of week 43, and the same is the case for the ferry route Sassnitz-Rønne. Air Berlin started in week 18, some others in week 13. Bornholmstrafikken started in week 14. The peak flying capacity to Sylt is from week 22 to week 35, i.e. 14 weeks, whereas on Bornholm the peak sailing season is from week 26 to week 35, i.e. 10 weeks. Total capacity on the ferry route Sassnitz-Rønne, for people travelling by car is 81.000 in each direction, i.e. 162.000 in total, on 157 roundtrips. (This is actually more than the flying capacity to Sylt, which is 73.000 in each direction in 2006, as mentioned).

In 2005 the capacity of the ferry route was a little lower, approximately 150.000, on 145 roundtrips (i.e. 75.000 in each direction). There were actually 91.000 passengers on the ferry route in 2005, according to Statistics Denmark, i.e. 56% of maximum capacity (for persons travelling by car). Of course, during some months, there was an above average capacity utilisation on the ferry route. – There is an all year car train to Sylt, from Niebüll.

Figure 21 Capacity per week in each directions, for people travelling by car, up to 4 persons per car, and rounds per week, Bornholmstrafikken, Sassnitz-Rønne, 2006

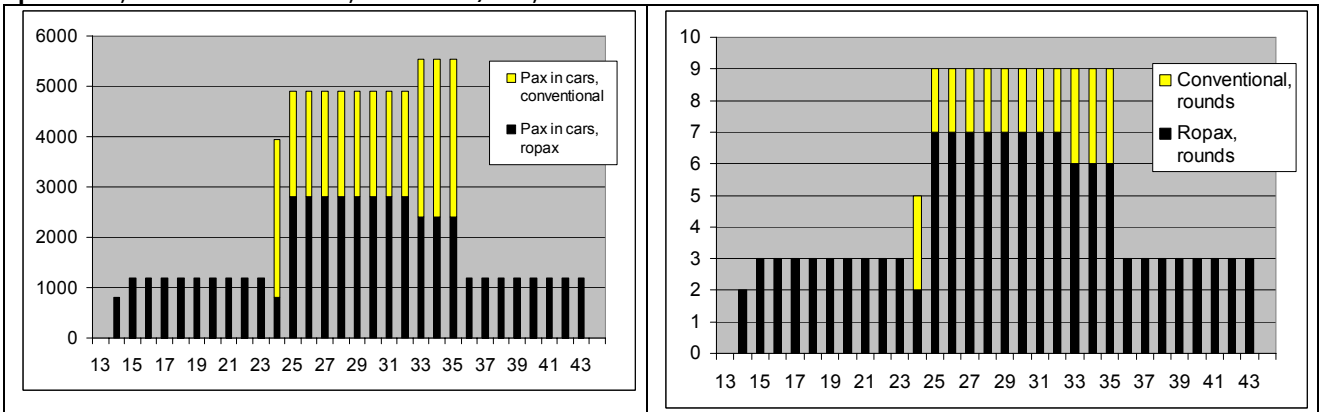
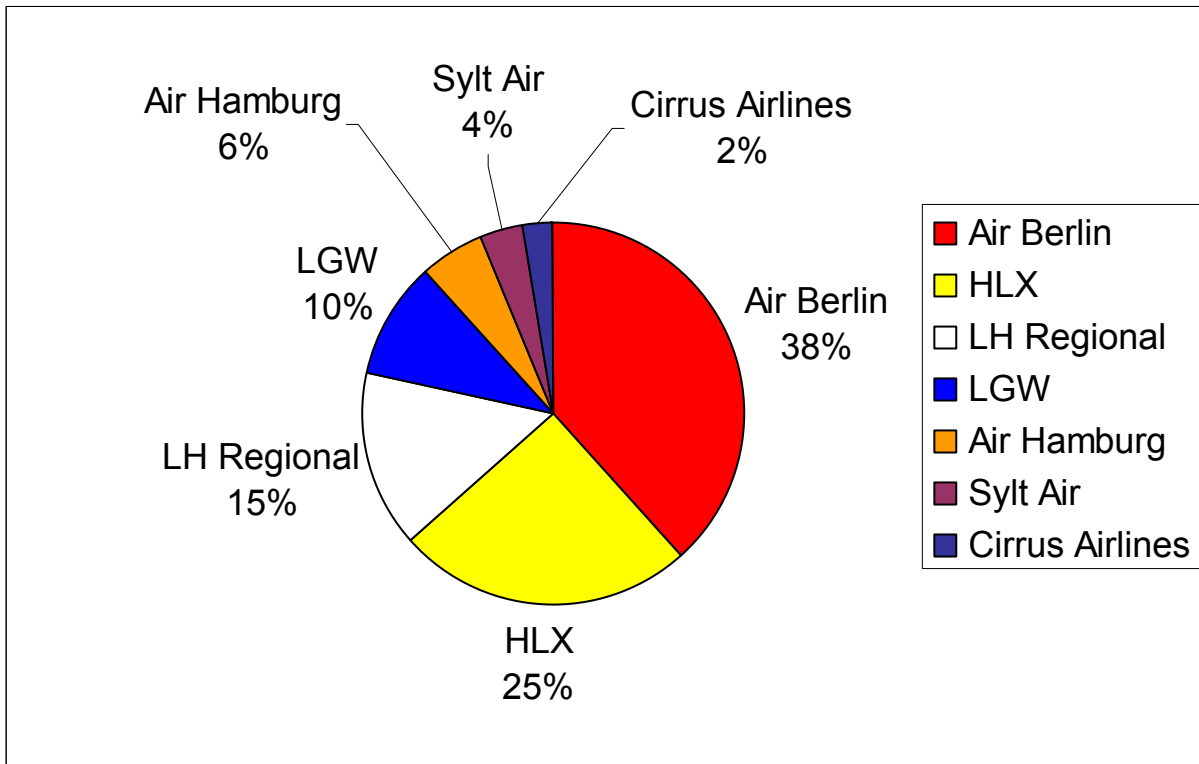
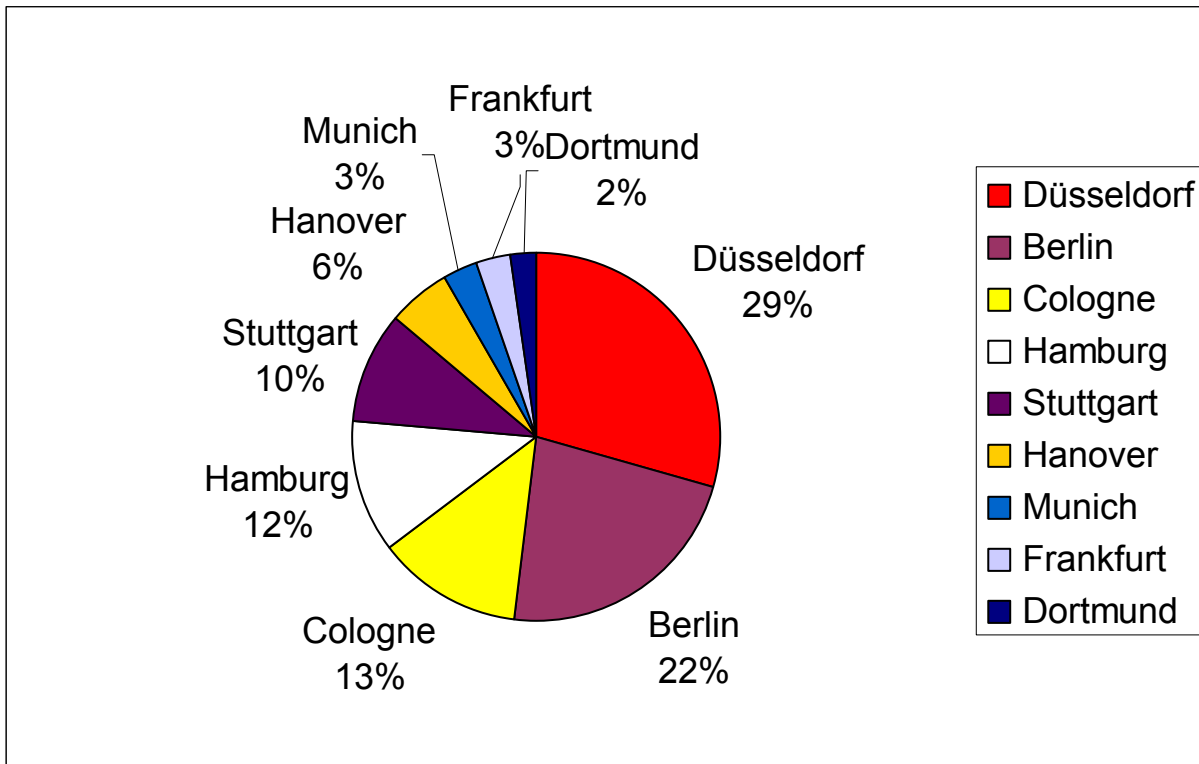


Figure 22 The share of seat capacity offered to Sylt Airport by 7 airlines (full year 2006)



Note: 73.000 seats are offered in each direction.

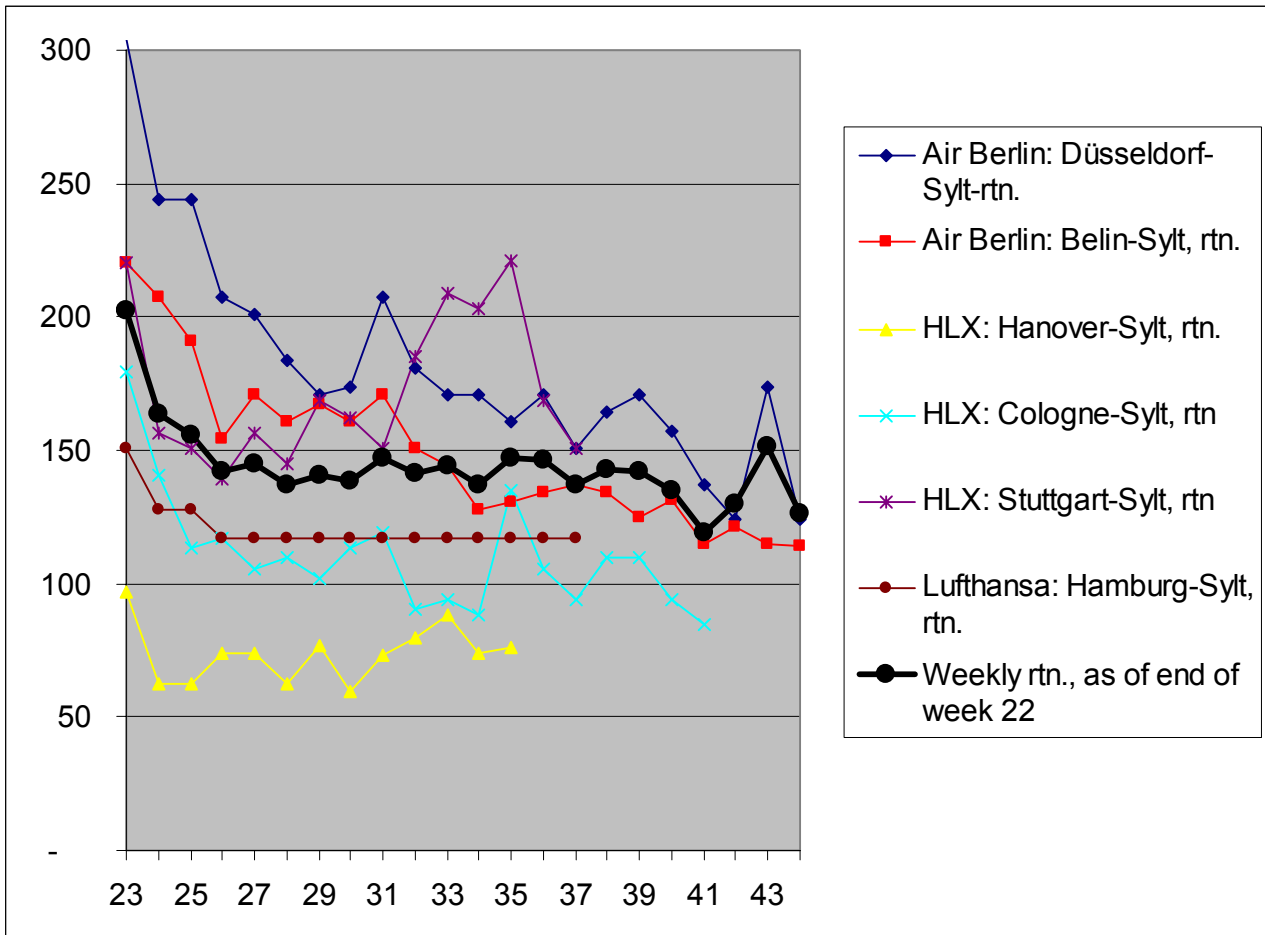
Figure 23 The share of seat capacity offered to Sylt Airport from 9 German cities (full year 2006)



Note: 73.000 seats are offered in each direction.

In 2004 Sylt Airport had 48.000 passengers (24.000 arrivals). This increased by 14.000 passengers to 62.000 in 2005. If there is an increase of another 14.000 this year, this means that there would be 76.000 passengers (38.000 arrivals). A total of 146.000 seats are offered (73.000 in each direction). This would indicate an average load factor of 52% for all routes under one. But maybe there will be more than 76.000 passengers travelling to and from Sylt Airport in 2006, or maybe some capacity will be cut out by the end of the season, whereby the average load factor would obviously be higher.

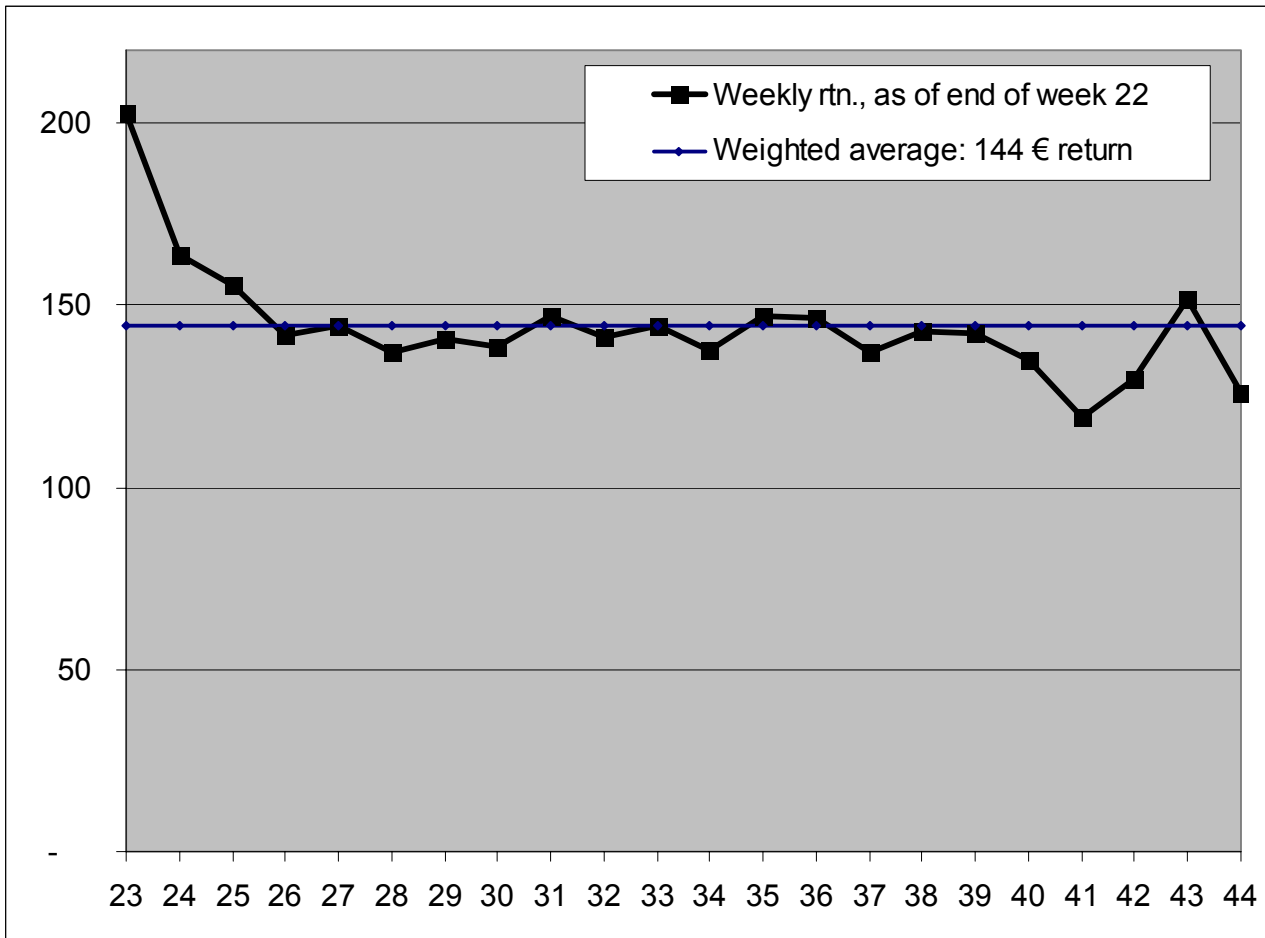
Figure 24 Return prices on selected routes to Sylt, including all extras, as of end of week 22, 2006



Source: Airline websites, end of week 22, 2006.

Prices of a number of routes to Sylt have been checked, by the end of week 22. The result is shown in Figure 24. For return trips (or two one way trips) for the rest of the season was EUR 144 return including all extras, as of the end of week 22.

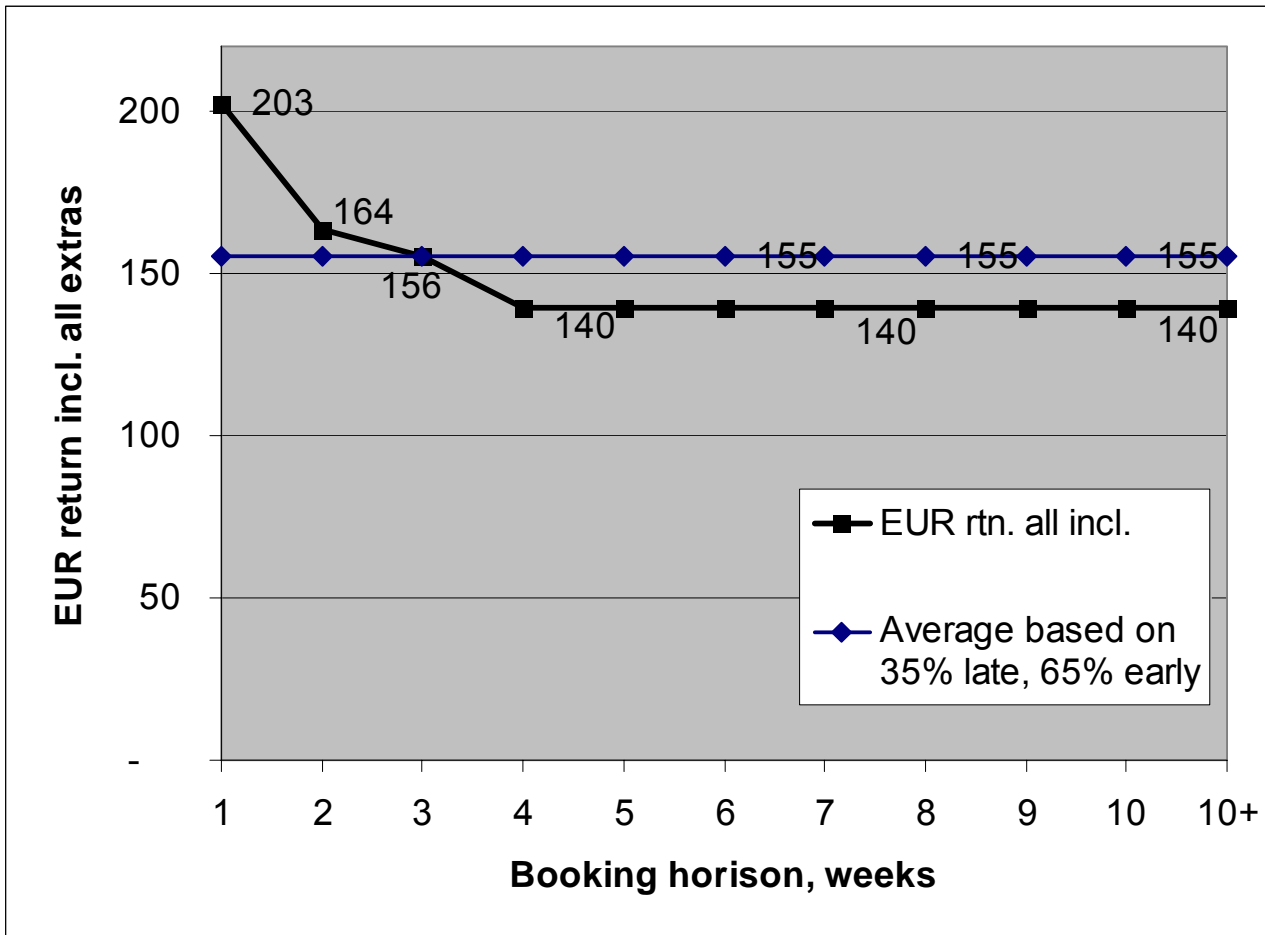
Figure 25 Average return prices on routes to Sylt, including all extras, as of end of week 22, 2006



Note: The average return prices including all extra are weighted by capacity.

The earlier tickets are booked, the lower the price. After some weeks a certain minimum level of price is reached. If for instance 20% are booked (this or) next week (called 1 week ahead), 10% one week longer ahead (called 2 weeks ahead), 5% another week longer ahead (called 3 weeks ahead) and the rest booked more weeks ahead the average price paid by the tourists will be somewhat higher than the average prices which can be looked up for the rest of the year. I.e., instead of (only) EUR 144 (the average online price for the rest of the year, here checked by the end of week 22), the average return price paid the the tourist will be EUR 155 (based on 7 routes of the top 3 players).

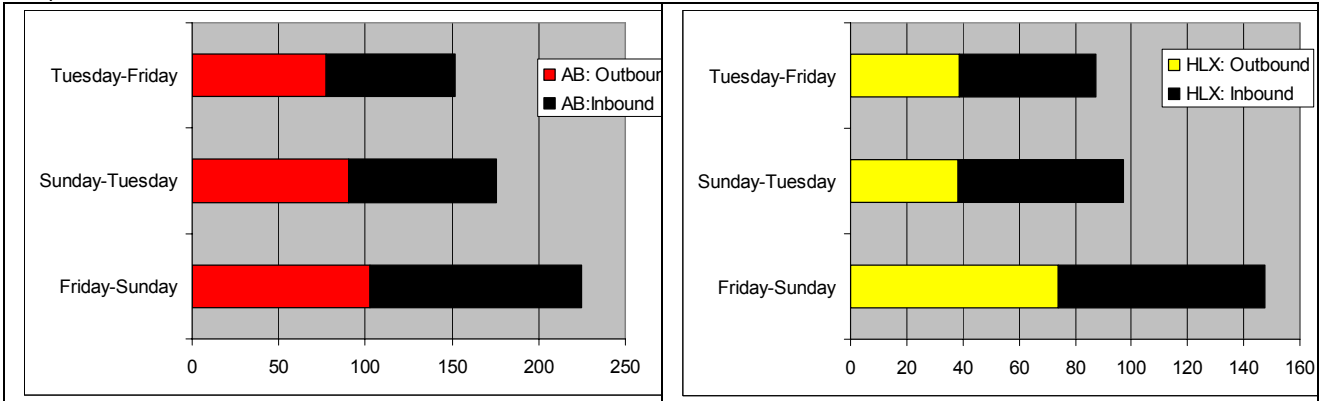
Figure 26 Average return prices paid on routes to Sylt by tourists, including all extras, 2006



The graph above shows, with the booking profile mentioned in this example that in week 1, prices will be 45% higher than the minimum, in week 2 17% above the minimum, in week 3 11% above, and from week 4 onwards the price will be at its minimum.

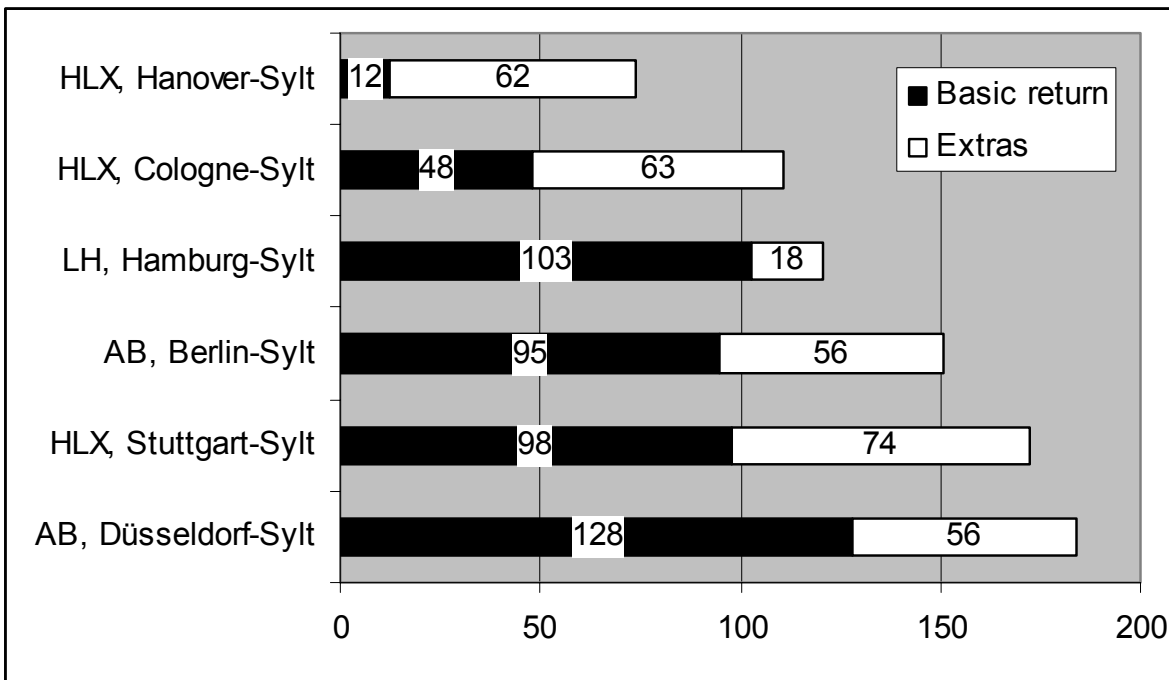
There is a difference in price, within weeks, depending on what day of the week outbound and inbound travel is undertaken. For example, for Air Berlin, on the route Düsseldorf-Sylt, which is flown three times a week, Friday, Sunday, and Tuesday, there are 9 different combinations of days. Three of these combinations are: Friday-Sunday, which cost 22% more than the overall average, Sunday-Tuesday cost 4% less than the overall average, and Tuesday-Friday is cheapest with a price of 17% Air Berlins own average for that route. – HLX flies the route Cologne/Bonn-Sylt Friday, Sunday, and Tuesday, and the same pattern of variation depending on day of outbound and inbound travel can be observed: Sunday-Tuesday cost 33% above the average, Sunday-Tuesday 12% less, and Tuesday-Friday 21% under the average of HLX on the route.

Figure 27 Average prices online for Air Berlin, Düsseldorf-Sylt, week 23-43, and for HLX, Cologne/Bonn-Sylt, week 23-41, Friday-Sunday, Sunday-Tuesday, Tuesday-Friday, return including all extras as checked by the end of week 22, 2006



A significant part of the price of a return ticket – or two oneway tickets – are extra. The below graph shows the average basic return prices and the extras, by the end of week 22 for the rest of the season for seven selected routes to Sylt by three airlines. The basic price range from 16% (for HLX) to 85% (for LH) of the total price. Or, conversely, the extras account from 84% down to 15% of the final price.

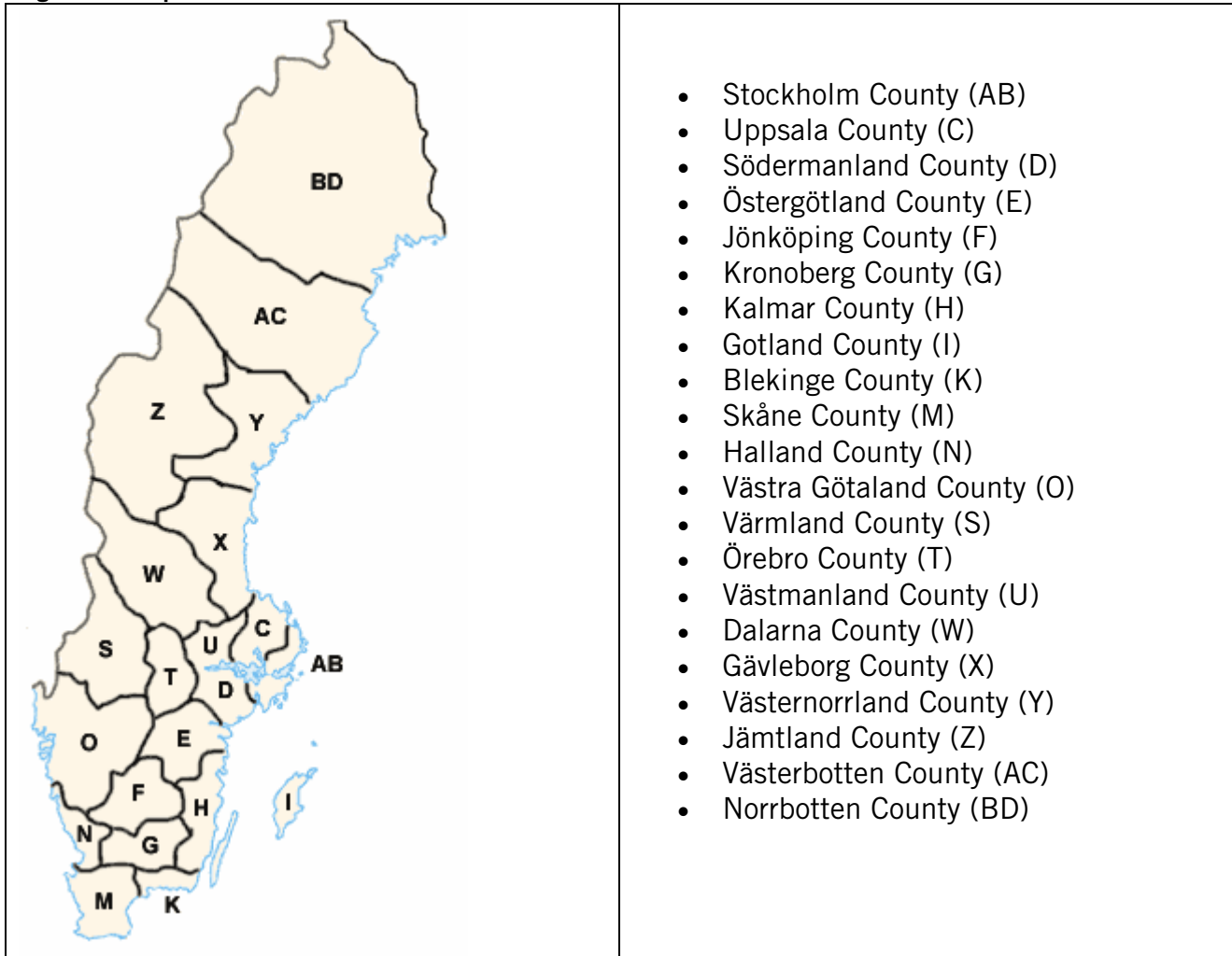
Figure 28 Return prices to Sylt, online, checked by end of week 22, for travel week 23-43, 2006



4. Sweden

There are 21 counties in Sweden, the location of which is shown below.

Figure 29 Map of Sweden – with counties



Source: http://commons.wikimedia.org/wiki/Image:Sweden_counties.png

The number of people living in each of the Swedish counties (län) and the number of information requests sent to Destination Bornholm from each of these are shown in Table 11.

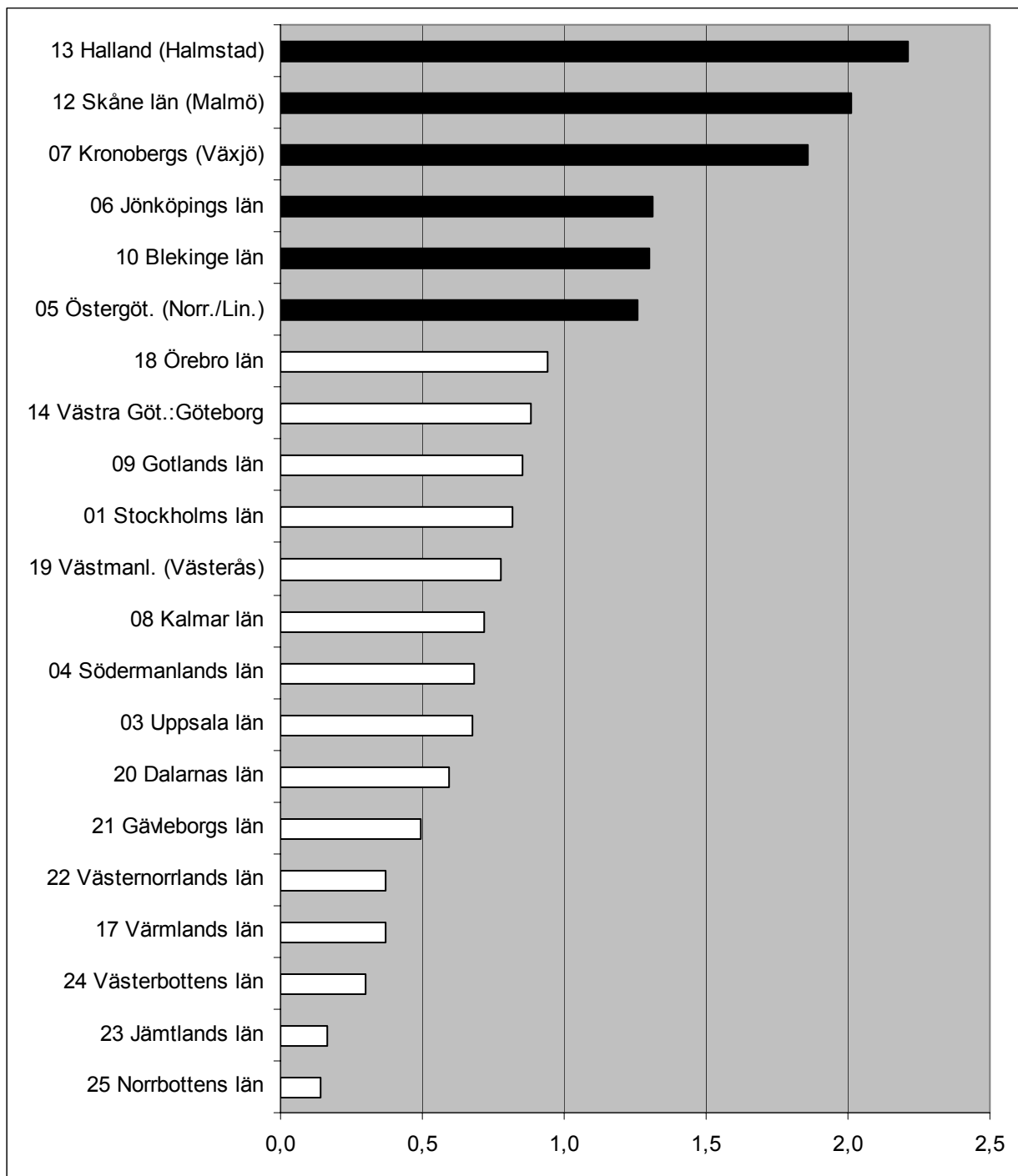
Table 11 Population in Sweden's 21 counties and requests sent to Destination Bornholm – 2005.

County	including	Population 2005	Population 2005 - %	Requests 2005	Requests 2005 - %	Bornholm's position	Km to Ystad	
01	Stockholms län	Stockholm	1.889.945	20,9%	442	17,1%	0,8	673
03	Uppsala län	Uppsala	304.367	3,4%	59	2,3%	0,7	739
19	Västmanlands län	Västerås	261.391	2,9%	58	2,2%	0,8	649
04	Södermanlands län	Nyköping	261.895	2,9%	51	2,0%	0,7	573
05	Östergötlands län	Norrköping	416.303	4,6%	151	5,8%	1,3	521
18	Örebro län	Örebro	274.121	3,0%	74	2,9%	0,9	554
14	Västra Götaland	Göteborg	1.528.455	16,9%	386	14,9%	0,9	327
17	Värmlands län	Karlstad	273.288	3,0%	29	1,1%	0,4	525
06	Jönköpings län	Jönköping	330.179	3,6%	124	4,8%	1,3	348
07	Kronobergs län	Växjö	178.443	2,0%	95	3,7%	1,9	221
08	Kalmar län	Kalmar	233.944	2,6%	48	1,9%	0,7	250
09	Gotlands län	Visby	57.488	0,6%	14	0,5%	0,9	315
10	Blekinge län	Karlshamn	150.696	1,7%	56	2,2%	1,3	125
12	Skåne län	Malmö	1.169.464	12,9%	673	26,0%	2,0	60
13	Hallands län	Halmstad	285.868	3,2%	181	7,0%	2,2	180
20	Dalarnas län	Borlänge	275.755	3,0%	47	1,8%	0,6	715
21	Gävleborgs län	Gävle	275.994	3,1%	39	1,5%	0,5	855
22	Västernorrlands län	Sundsvall	243.736	2,7%	26	1,0%	0,4	1050
23	Jämtlands län	Östersund	127.028	1,4%	6	0,2%	0,2	1230
24	Västerbottens län	Umeå	257.652	2,8%	22	0,8%	0,3	1370
25	Norrbottnens län	Luleå	251.740	2,8%	10	0,4%	0,1	1630
Total, Sweden			9.047.752	100,0%	2591	100,0%	1,0	377
3 airport catchment areas:			Criteria 2		Criteria 1		Criteria 3	
3 counties: 01,03,19	Arlanda		2.455.703	27,1%	559	21,6%	0,8	673
3 counties: 04,05,18	Norrköping		952.319	10,5%	276	10,7%	1,0	521
14 Västra Götaland	Gothenburg		1.528.455	16,9%	386	14,9%	0,9	327
6 counties: 20 - 25	Via Arlanda		1.431.905	15,8%	150	5,8%	0,4	change

Sources: <http://www.ssd.scb.se/databaser> (population), and Destination Bornholm (information requests).

Bornholm's relative position has been calculated as each county's share of the population of Sweden divided by the percentage of the information requests sent to Destination Bornholm from potential tourists in the different counties.

Figure 30 Bornholm's position in the 21 counties of Sweden (2005)



There are three airports, which are now being evaluated, using the three criteria of (1) current interest in Bornholm (as indicated by the number of information requests), (2) population in the catchment area, and (3) distance to the ferry port (here Ystad).

Let us see first how Arlanda Airport, with the Swedish three surrounding counties of Stockholm, Uppsala and Västmanland (Västerås) fares on the three airport evaluation criteria:

- 1) There were 559 information requests sent to Destination Bornholm from people living in the mentioned three counties around Arlanda Airport, i.e. well over 500.
- 2) Including Västmanland (Västerås), although it is located 110 km from Arlanda, there are 2,46 million people living in the three counties of Stockholm, Uppsala and Västmanland, i.e. far more than one million. There are less than 50 km from Stockholm and Uppsala to Arlanda.
- 3) There are more than 500 km to the ferry port from the main city in each county (Stockholm, Uppsala and Västmanland).

So, Arlanda Airport passes on all three criteria.

It is an additional plus for Arlanda Airport that there were 150 information requests from the counties north of the main catchment area. Some of those interested in visiting Bornholm from the northernmost counties of Sweden may fly to Arlanda, and change flight there or drive to Arlanda.

Next, let us see how Norrköping Airport, with the three surrounding counties of Östergötland County, Södermanland - and Örebro County - fares on the three criteria:

- 1) There were 275 information requests sent to Destination Bornholm from people living in the mentioned three counties around Norrköping Airport, i.e. only a little over half of the 500 target.
- 2) There are just about 1 million people living in the three counties of Östergötland, Södermanland and Örebro, although the latter is located 115 km from Norrköping.
- 3) There are more than 500 km to the ferry port from the main city in each county, Norrköping, Nyköping and Örebro (although Linköping in the south east of Östergötland County is actually only 475 km from Ystad).

So, Norrköping Airport passes on two of the three criteria.

Finally, the Gothenburg Landvetter Airports is assessed⁵:

- 1) There were 386 information requests sent to Destination Bornholm from people living in Västra Götaland (where Gothenburg is the main city), i.e. not very much under the 500 target.⁶
- 2) There are 1,5 million people living in the Västra Götaland.
- 3) There are only 327 km to the ferry port from Gothenburg to Ystad, which is clearly below the approximate minimum of 500 km.

⁵ The Gothenburg Trollhättan Airport is not considered relevant, since it is located over 100 km to the north.

⁶ Another 29 requests were received from Värmland (where Karlstad is the main city). There are about 200 km from Karlstad to Gothenburg.

4.1 Seasonality – Sweden

Figure 31 Hotel guests on Bornholm and information requests by month (2005) – Sweden

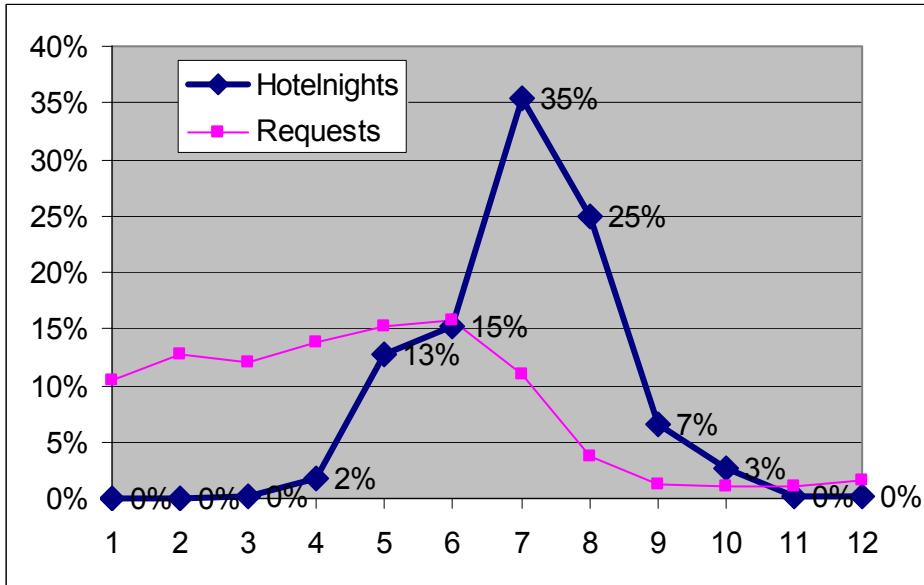
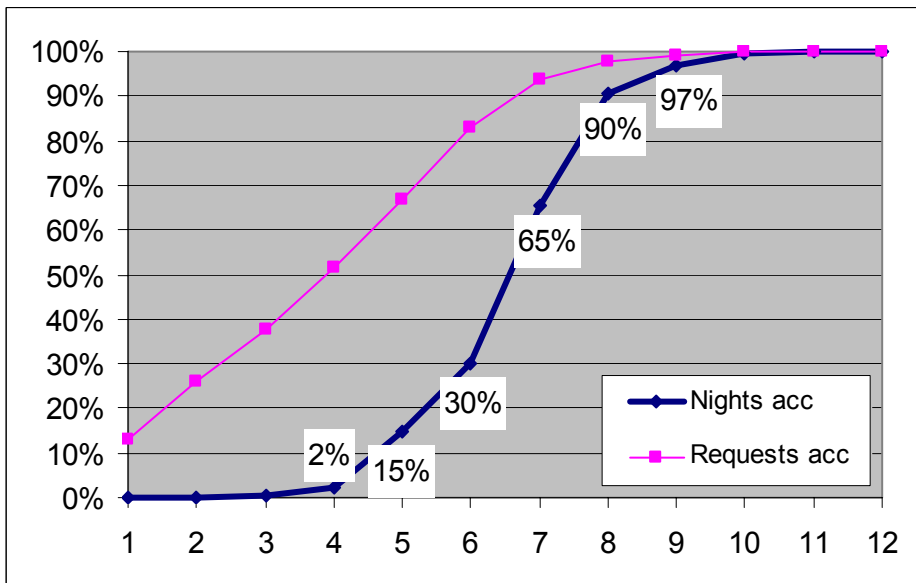


Figure 32 Hotel guests on Bornholm and information requests by month accumulated – Sweden



Note: January (accumulated) includes November and December from the previous year.

By the end of April, over 50% of the information collection activities by those Swedes who are interested in going to Bornholm has been undertaken.

4.2 Case: Seasonal flights from mainland Sweden to Gotland

Although the distance from Hamburg to Sassnitz is no longer than from Gothenburg to Ystad, the ferry from Ystad to Bornholm has got shorter crossing time and is more frequent than the ferry from Sassnitz to Bornholm. If direct flights from Stockholm Arlanda are established, dependent on the experiences from that route it can be considered to establish semi-weekly flights from Gothenburg to Bornholm. Candidate airlines for serving a route from Gothenburg Landvetter to Bornholm would include City Airline AB, which flies once or twice a week from Landvetter to Visby on Gotland, by a Embraer RJ145 with 49 seats.⁷ City Airline AB has got 3 of this type of jet airplane, and 3 of the Embraer ERJ-135 for 37 passengers. Either of these airplane types could be relevant for flights from Gothenburg to Bornholm during the summer period.

Table 12 City Airline AB is flying from Gothenburg to Visby (2006), and could fly to Bornholm

Week No.	Month	Wednesday Date	Wednesday Rounds	Saturday Date	Saturday Rounds	Rounds per week
21	May	24	0	28	0	0
22	May/June	31	0	3	1	1
23	June	7	0	10	1	1
24	June	14	0	17	1	1
25	June	21	0	24	1	1
26	June/July	28	0	1	1	1
27	July	5	1	8	1	2
28	July	12	1	15	1	2
29	July	19	1	22	1	2
30	July	26	1	29	1	2
31	August	2	1	5	1	2
32	August	9	1	12	1	2
33	August	16	1	19	1	2
34	August	23	0	26	0	0
22-33	June-Aug.	7		12		19
Airplane type used on all flights. Embraer RJ145 (ER4, ERJ). No of seats:						49
Total seats offered on the route Gothenburg-Visby (in each direction):						931

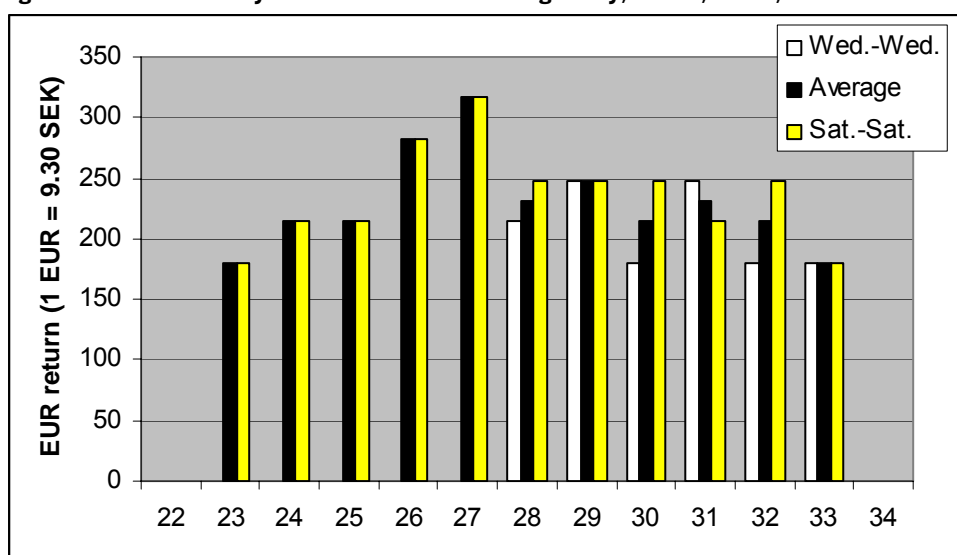
⁷ The price, for example from Saturday 24 June to 1 July was SEK 2625 (EUR 282) three or four weeks before departure.

Table 13 Prices of City Airline AB for Gothenburg-Visby, return, 2006, as of end of May

Week No.	SEK rtn.		EUR rtn.		EUR rtn. Average
	Wed.-Wed	Sat.-Sat.	Wed.-Wed.	Sat.-Sat.	
21					
22		1671		180	180
23		1989		214	214
24		1989		214	214
25		2625		282	282
26		2943		316	316
27	1989	2307	214	248	231
28	2307	2307	248	248	248
29	1671	2307	180	248	214
30	2307	1989	248	214	231
31	1671	2307	180	248	214
32	1671	1671	180	180	180
33					
34					
Average	1936	2191	208	236	226

Note: The flying time is 55 minutes by the Embraer RJ145 jet airplane with 49 seats.

Figure 33 Prices of City Airline AB for Gothenburg-Visby, return, 2006, as of end of May



Note: The overall average was SEK 2191 or EUR 226, return.

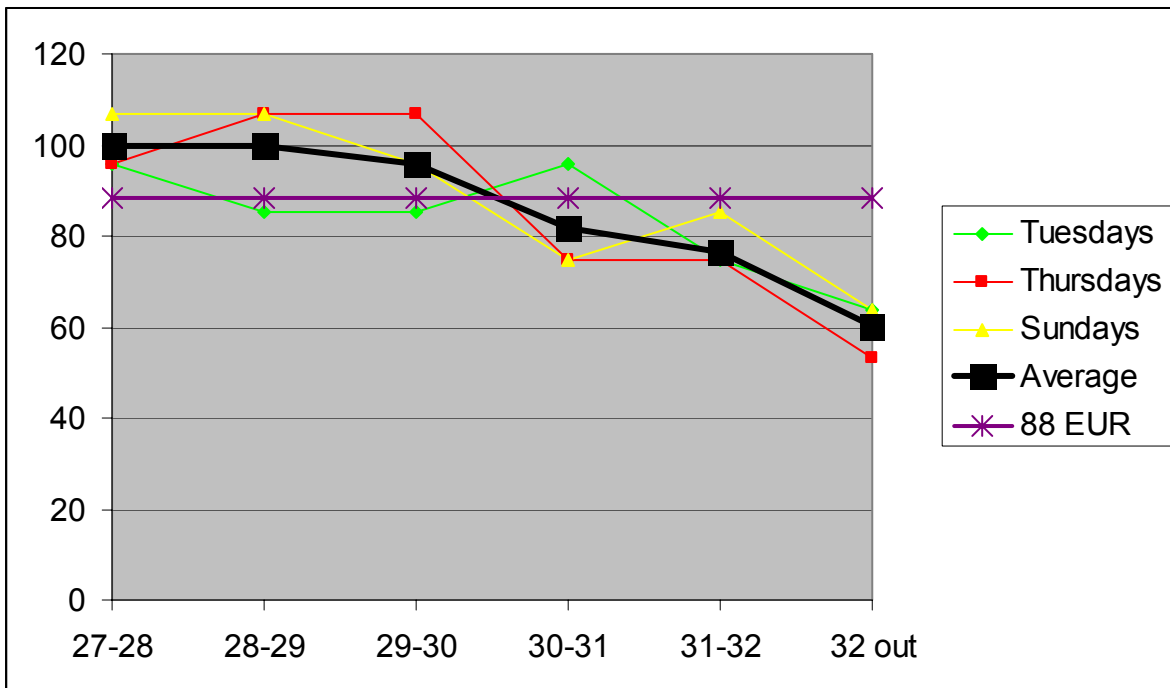
According to cityairline.com, the following websites should suffice for holidays from Gothenburg to Gotland, apart from the airlines own website: A tourist information site (www.gotland.info), a destination based tour operator (www.gotlandsresor.se), and two other information site (www.alltomgotland.se, www.gotland.net). Gotlandsresor lists only two hotels at its website.

Cimber Air starts operating a direct service from Norrköping to Visby flying 3 times a week from 3 July - 11 August, i.e. for 6 weeks. This makes 18 rounds, by the CRJ jet plane for 50 passengers: 2700 seats offered, with stop in Norrköping. Prices as of end of May were EUR 178 return, incl. EUR 10 in internet booking fee (adventure tickets, only bookable online). – Copenhagen-Norrköping, which is a flight very similar to Norrköping-Bornholm, was prices at DKK 737 (EUR 99, including a EUR 10 internet booking fee).⁸

⁸ The Norrköping-Visby legs were DKK 275 (EUR 37) each way, i.e. EUR 84 return including booking fee.

Kullaflyg.se, part of the Sverigeflyg.se group (or Gotlandsflyg.se), offers summer flights from Helsingborg Ångelholm to Visby, for 6 weeks (27-32), three times a week (Tuesday, Thursday and Sunday). Prices start at SEK 493 one way. However, to get this price you would need to travel out on the last Thursday (week 32), and with no possibility of getting back on the last Sunday (plane full). The overall average price was EUR 88 per leg (one way). On Tuesdays the average was EUR 85, on Thursdays EUR 88, and on Sundays EUR 92 per leg.

Figure 34 Prices in each direction for the route Helsingborg-Visby, 2006.



Source: Based on www.gotlandsflyg.se, as seen end of May 2006.

Note: Exchange rate was 9,30 SEK per EUR. Return prices were checked for Tuesday-Tuesday, Thursday-Thursday, or Sunday-Sunday, in the weeks mentioned.

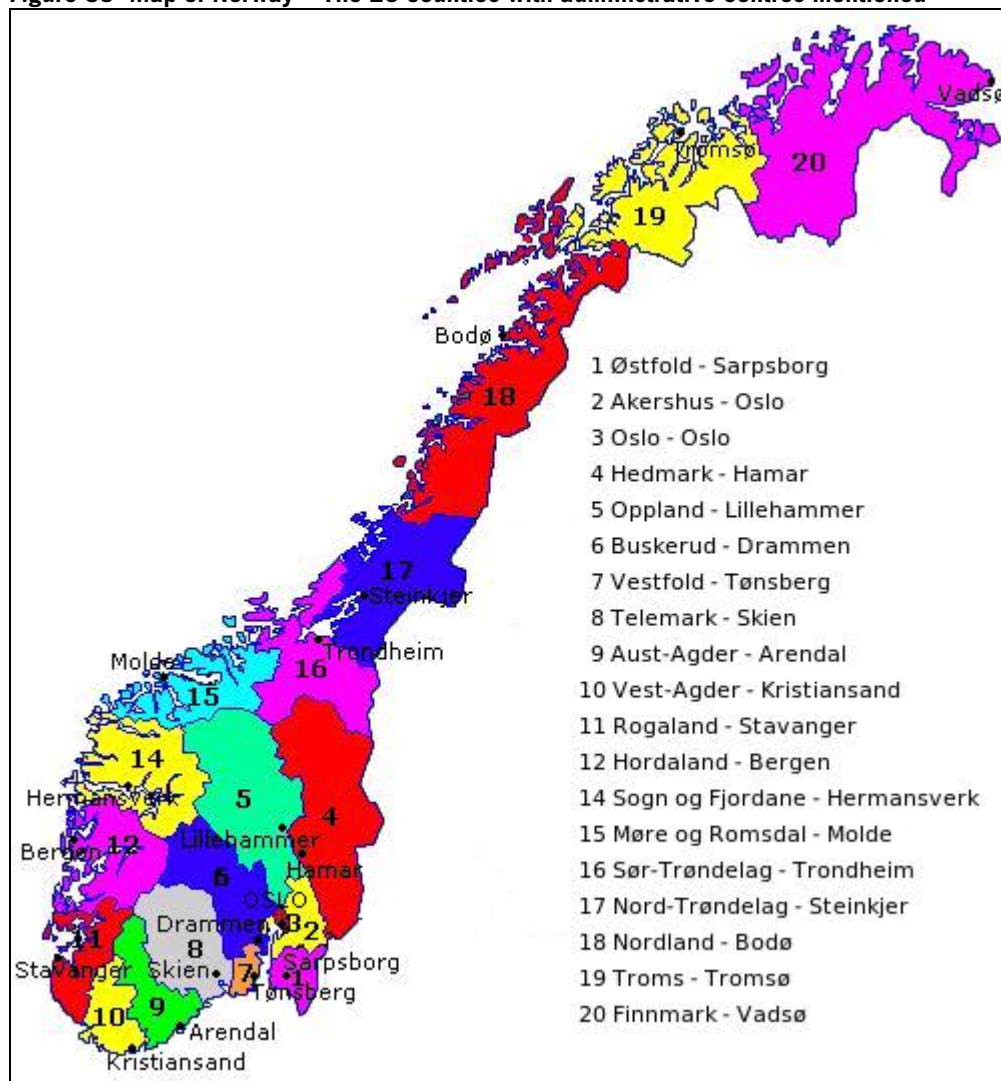
Gotlandsflyg.se offers air and hotel packages, based on just two different hotels.

5. Norway

The 20 counties of Norway are divided into seven regions:

- | | |
|--------------------------|--|
| 1. Oslo and Akershus : | Oslo and Akershus |
| 2. Hedmark and Oppland : | Hedmark and Oppland |
| 3. Sørøstlandet : | Østfold, Buskerud, Vestfold and Telemark |
| 4. Agder and Rogaland : | Aust-Agder, Vest-Agder and Rogaland |
| 5. Vestlandet : | Hordaland, Sogn and Fjordane, Møre and Romsdal |
| 6. Trøndelag : | Sør-Trøndelag and Nord-Trøndelag |
| 7. Nord-Norge : | Nordland, Troms and Finnmark |

Figure 35 Map of Norway – The 20 counties with administrative centres mentioned



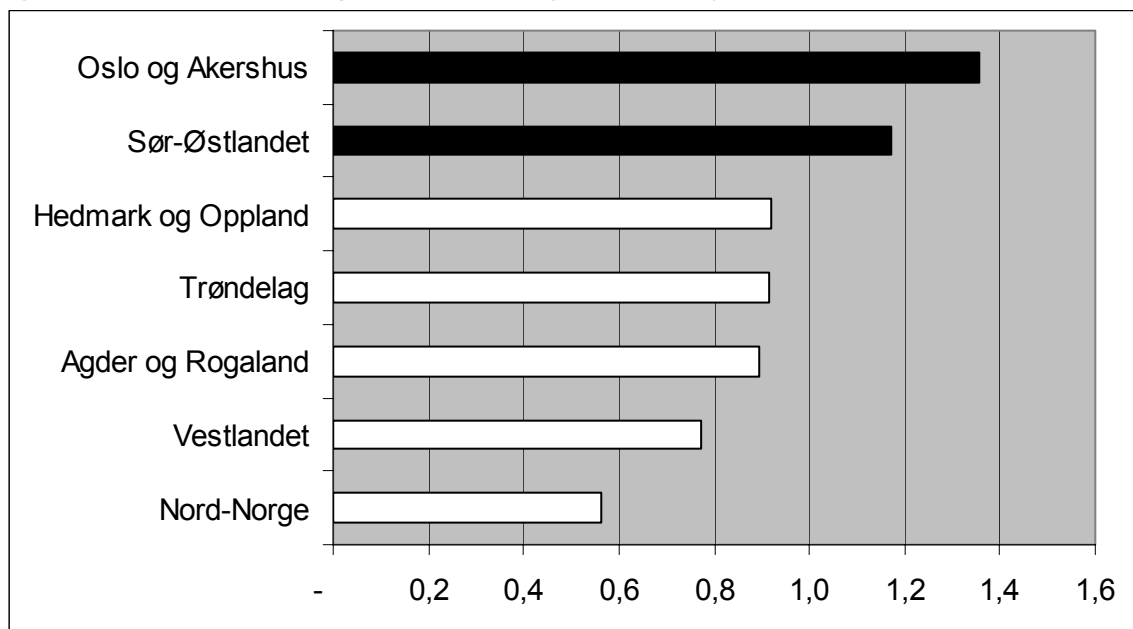
Source: http://commons.wikimedia.org/wiki/Image:Norway_counties.jpg

Table 14 Population in the 7 parts of Norway and information requests about Bornholm (2005)

No.	The 7 parts of Norway	Main cities	Population	Requests	Population %	Requests %	Bornholm's position
1	Oslo og Akershus	Oslo	1.024.064	375	22,2%	30,2%	1,4
2	Hedmark og Oppland	Hamar, Lillehammer	371.550	92	8,1%	7,4%	0,9
3	Sør-Østlandet	Sarpsborg, Drammen, Tønsberg, Skien	889.058	281	19,3%	22,6%	1,2
4	Agder og Rogaland	Arendal, Kristiansand, Stavanger	657.976	159	14,3%	12,8%	0,9
5	Vestlandet	Bergen, Leikanger, Molde	800.064	167	17,4%	13,4%	0,8
6	Trøndelag	Trondheim, Steinkjer	401.011	99	8,7%	8,0%	0,9
7	Nord-Norge	Bodø, Tromsø, Vadsø	462.640	70	10,0%	5,6%	0,6
Total			4.606.363	1.243	100,0%	100,0%	1,0

1+2+3	Gardermoen	2.284.672	748	50%	60%	1,2
-------	------------	-----------	-----	-----	-----	-----

Figure 36 Bornholm's relative position in the 7 regions of Norway



The question could be: What is the catchment area of the main airport in Norway, Gardermoen? Certainly no. 1 Oslo and Akershus. Probably no. 2 Hedmark and Oppland as well. And no. 3 Sør-Østlandet. But that's probably it. With connecting flights of course the whole of Norway is a catchment area of the Gardermoen Airport. The three parts of Norway, nos. 1-2-3, account for 50% of the population of Norway and

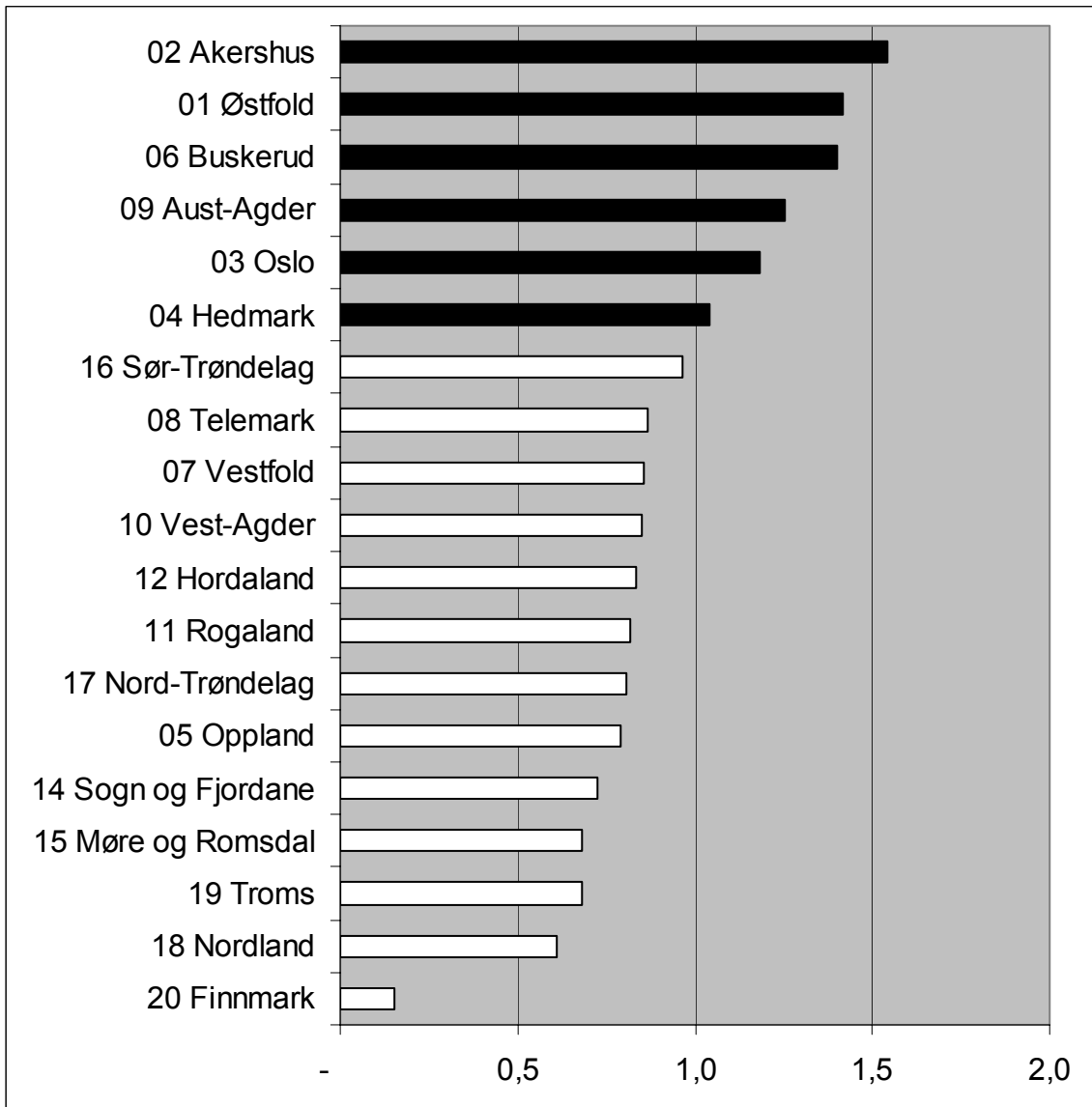
60% of the information requests sent to Destination Bornholm. The latter is a good indicator of the interest of visiting Bornholm.

However, it is possible to refine the above somewhat. For example, it is unlikely that people from Østfold (Sapsborg), on the border to Sweden, would drive all the way up to Gardermoen instead of take their car straight to Ystad in Sweden and catch the ferry from there. Also, in Vestfold (Tønsberg) and Telemark (Skien) the distance to Ystad is only four times as much as to the airport in Gardermoen. Therefore, instead of just driving some 160 km to the airport, it is thought that many people from Vestfold and Telemark would prefer to drive the additional 500 km or so all the way to the ferry in Ystad.

Table 15 Population in the 19 counties Norway – and information requests about Bornholm in each (2005)

	County	Admin. Centre	Population	Requests	Population %	Requests %	Bornholm's position
1	03 Oslo	Oslo	529.846	169	11,5%	13,6%	1,2
1	02 Akershus	Oslo	494.218	206	10,7%	16,6%	1,5
2	04 Hedmark	Hamar	188.376	53	4,1%	4,3%	1,0
2	05 Oppland	Lillehammer	183.174	39	4,0%	3,1%	0,8
3	01 Østfold	Sarpsborg	258.542	99	5,6%	8,0%	1,4
3	06 Buskerud	Drammen	243.491	92	5,3%	7,4%	1,4
3	07 Vestfold	Tønsberg	220.736	51	4,8%	4,1%	0,9
3	08 Telemark	Skien	166.289	39	3,6%	3,1%	0,9
4	09 Aust-Agder	Arendal	103.596	35	2,2%	2,8%	1,3
4	10 Vest-Agder	Kristiansand	161.276	37	3,5%	3,0%	0,9
4	11 Rogaland	Stavanger	393.104	87	8,5%	7,0%	0,8
5	12 Hordaland	Bergen	448.343	101	9,7%	8,1%	0,8
5	14 Sogn og Fjordane	Leikanger	107.032	21	2,3%	1,7%	0,7
5	15 Møre og Romsdal	Molde	244.689	45	5,3%	3,6%	0,7
6	16 Sør-Trøndelag	Trondheim	272.567	71	5,9%	5,7%	1,0
6	17 Nord-Trøndelag	Steinkjer	128.444	28	2,8%	2,3%	0,8
7	18 Nordland	Bodø	236.825	39	5,1%	3,1%	0,6
7	19 Troms	Tromsø	152.741	28	3,3%	2,3%	0,7
7	20 Finnmark	Vadsø	73.074	3	1,6%	0,2%	0,2
	Total, Norway, 2005	Oslo	4.606.363	1.243	100,0%	100,0%	1,0
02+03+04+05+06 Gardermoen			1.639.105	559	36%	45%	1,3

Figure 37 Bornholm's relative position in the 19 counties of Norway



Defining the airport's catchment area:

There should *not* be much more than 100 km from the tourist's home town to the airport.

Criteria for evaluating departure airports – with ferry to Bornholm as the alternative:

1. There should preferably be at least 500 couples/families/households from the airport's catchment area, who requested information about Bornholm in 2005.
2. There should be at least one million people living within ~100 km from the airport.
3. There *should* be more than 500 km from the tourists home town to the ferry port (alternatively - simplified: more than 500 km *from the airport* to the ferry port).

Obviously criterion one can be affected in future years by market communication (advertising) as well as by the price parameter.

After these considerations Østfold, Vestfold and Telemark are left out, leaving five of the 19 counties in Norway as the most relevant catchment area for the Gardermoen airport, when driving to Ystad is the alternative.

03 Oslo - Oslo
02 Akershus - Oslo
04 Hedmark - Hamar
05 Oppland - Lillehammer
06 Buskerud - Drammen

1. In absolute terms, there were 559 couples etc. who requested information about Bornholm in 2005 (from Destination Bornholm, the regional destination marketing company, alone), i.e. more than 500.
2. There are 1,64 million people living in the 5 above counties, i.e. far over one million.
3. In all of the above five counties there are more than 500 km to the ferry port in Ystad.

So, Gardermoen Airport in Norway "passes" all three criteria.

The following may be noted about other Norwegian airports: From the three counties around the Sandefjord Airport Torp (Vestfold/Tønsberg, Telemark/Skien, Østfold/Sapsborg) there were 189 information requests and a population of about 650.000 (Buskerud/Drammen not included). Sandefjord has got domestic flights by Widerøe to Bergen, Stavanger and Trondheim. There is considerable interest in Bornholm from the counties of these cities. Flights Sandefjord-Bornholm on Saturday afternoons or Sunday mornings could be considered. Even a stop in Aalborg could be considered, to combine the passenger potential of one week holiday flights to Bornholm from this secondary airport of Norway and a secondary airport of Jutland.

In Buskerud (with Drammen) there were 92 information requests and a population of 244.000 people. Drammen is located 84 km from Gardermoen and there is the same distance to Sandefjord. Buskerud/Drammen has been included under Oslo Gardermoen, but not under Sandefjord, since Gardermoen looks more promising than the Sandefjord Airport Torp for direct summer flights to Bornholm.

5.1 Seasonality - Norway

Tourists from Norway who actually visited Bornholm (in 2005) and stayed in hotels or holiday centres, were extremely concentrated in July, with 55% of Norwegian hotelnights. In June there were 24% and in August there were 17%. Thus, for Norway it seems like at least four roundtrips in July plus two roundtrips in June and one or two in August from Oslo Gardemoen would be a good start.⁹

⁹ From Sandefjord Torp only around four roundtrips by a 50 seat airplane seems to be possible. Perhaps this is too little for a route to be feasible. Six rounds may be minimum. Should it fail to get flights from Gardemoen started, the Buskerud (Drammen) county could be served from the Sandefjord Torp Airport, in which case there could be another two rounds by a 50 seat airplane, so that six rounds could be made.

Figure 38 Hotel guests on Bornholm and information requests by month (2005) – Norway

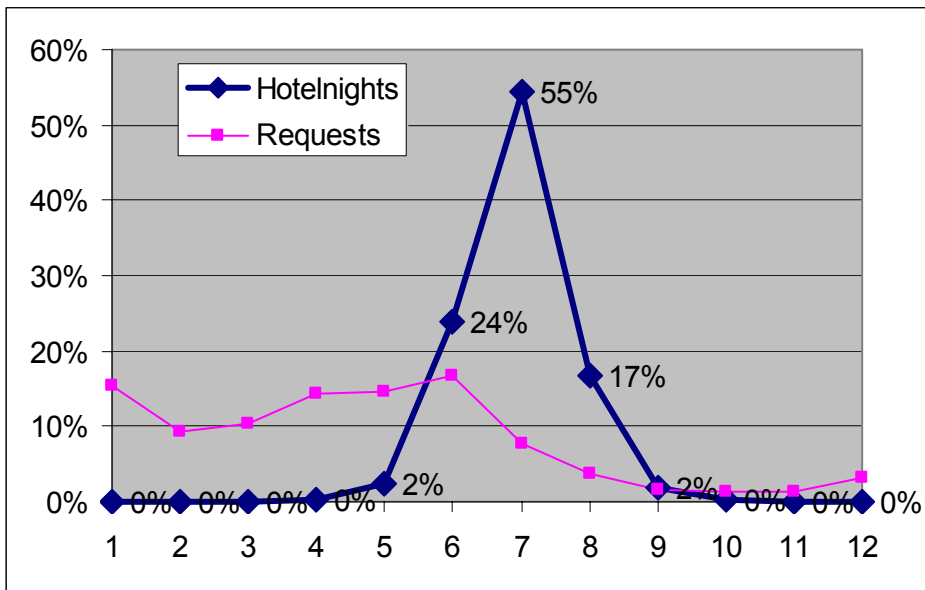
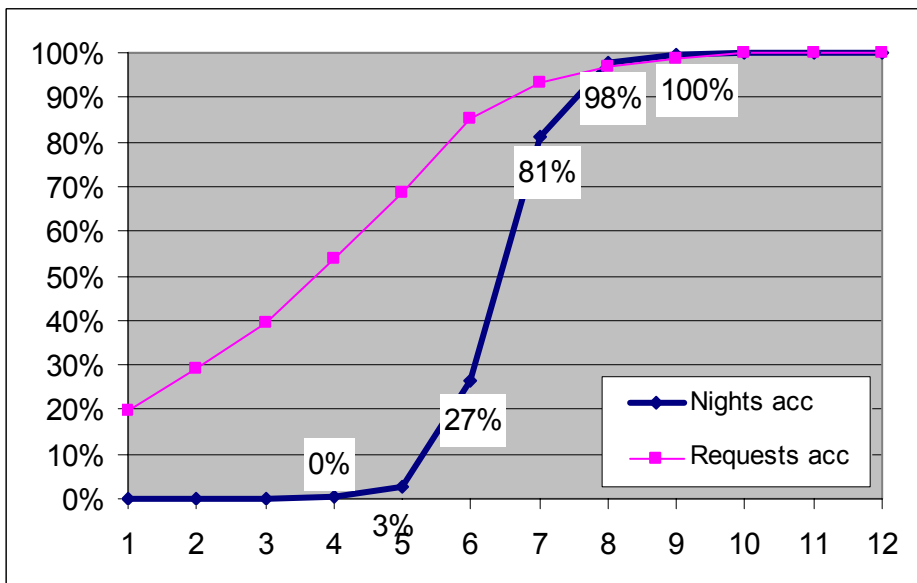


Figure 39 Hotel guests on Bornholm and information requests by month accumulated – Norway



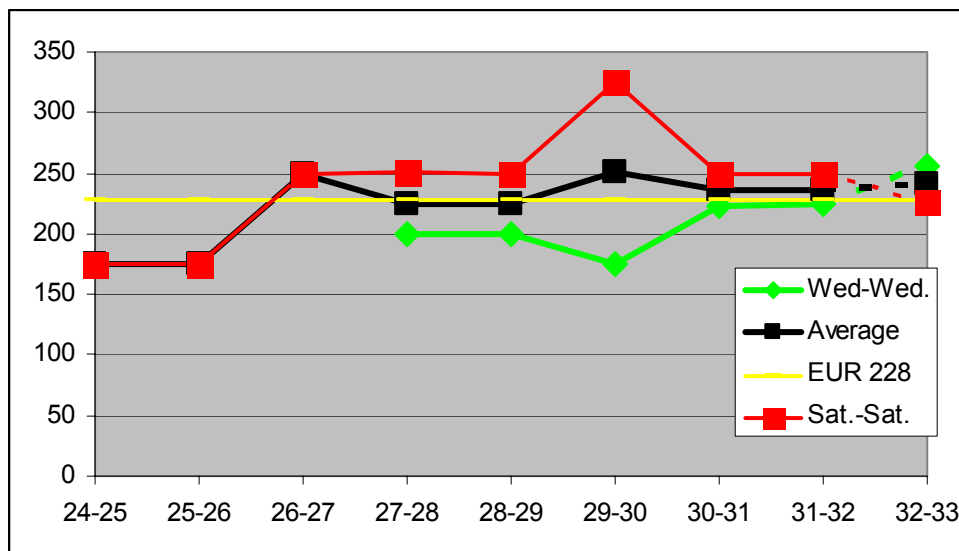
Note: January (accumulated) includes November and December from the previous year.

By the end of April, about 54% of the information collection by Norwegians interested in visiting Bornholm has taken place.

5.2 Case: Oslo-Gotland -- price and distribution

Wideroe: "We fly directly from Oslo (Gardermoen) in the period 17.6. to and including 12.8.2006. During the period 17.6.-1.7. only Saturdays, but from then and until 12.8 there is also departure on Wednesdays. - Prices start at NOK 490 per leg.¹⁰

Figure 40 Lowest return prices incl. taxes and fees, Oslo-Gotland, go 17/6-12/8 (19/8) 2006



Source: Based on www.wideroe.no, checked end of May.

The overall average for the cheapest return flight including taxes (200 NOK) and booking fee (50 NOK) was NOK 1788, or *EUR 228*.¹¹ Not all tickets will be booked at the lowest rates, but most probably will. The first midweek flight is on Wednesday 5 July. The return flights on the last Wednesday and the last Saturday are via Stockholm by partner airlines. Wideroe flies the route Oslo-Gotland with a Dash 8-300 airplane with 50 seats.

Wideroe offers its lowest prices at its website. According to the annual accounts of SAS for the year 2005, Wideroe sold as many as 33% of its tickets on the Internet, 58% by telephone and 9% via agents. In its press release from 27 January 2006, Wideroe refers to the website www.gotland.info (corresponding to www.bornholm.info) for general tourist information and/or www.gotlandsresor.se for online booking of accommodations. Correspondingly, www.gotlandsresor.se links to www.wideroe.no for booking of the flights.

Thus, at the Norwegian market there is no Norwegian tour operator involved in distributing holidays to Gotland, and the same approach can be used for holidays from Norway to Bornholm, i.e. booking of flight and hotel separately. However, as a supplement to this, in the case of air-based holidays from Oslo to Bornholm, tour operators on Bornholm could offer packages in the same way as is done for example in connection with the Cimber flights from Billund to Bornholm.¹² In a later chapter the website on which Bornholm hotels can be booked online are mentioned.

¹⁰ Wideroe about Gotland: www.wideroe.no/modules/module_123/proxy.asp?iDisplayType=2&iCategoryId=97&iInfold=945. - Widerøe continue its flights to Gotland. www.hangar.no/articles/582/1/Wider%F8e-tilbake-til-Gotland

¹¹ Exchange rate applied: 1 EUR = 7,8324 NOK, end of May 2006.

¹² www.tv2bornholm.dk/moduler/nyheder/news.asp?id=26242& - 25 May 2006. www.cimber.dk/sw11834.asp

6. Poland

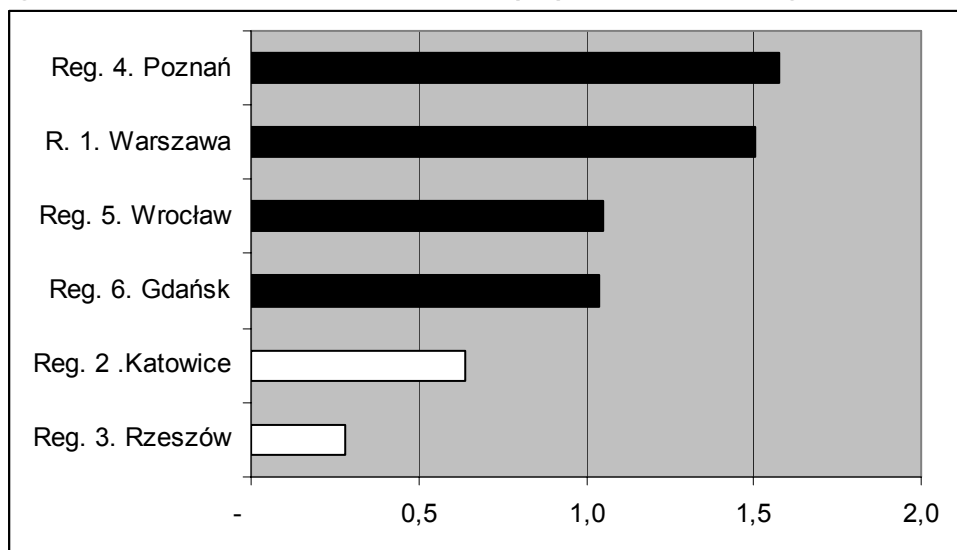
There are 16 voivodships in Poland, which can be combined into 6 regions.

Table 16 Population in the six regions of Poland and the interest in Bornholm in each region (2005)

Region, airport	Population 04	Population%	GDP % of EU	Requests	Requests%	Rel. interest	Km ferry
4. Poznan	6.066.896	16%	39,5%	147	25%	1,6	283
1. Warszawa	7.732.113	20%	50,5%	179	30%	1,5	527
5. Wrocław	3.949.452	10%	38,3%	64	11%	1,1	460
6. Gdansk	5.688.337	15%	35,0%	91	15%	1,0	247
2 .Katowice	7.963.996	21%	39,5%	78	13%	0,6	654
3. Rzeszów	6.779.455	18%	<i>28,1%</i>	29	5%	<i>0,3</i>	801
Total	38.180.249	100%	38,9%	588	100%	1,0	515

Seen in relation to the size of the population in each region, there is a high interest in going to Bornholm in the north west of Poland, region 4, closest to the ferry ports. Also, there is high interest in going to Bornholm among the relatively wealthy population in region 1, where Warsaw is the main city.

Figure 41 The relative interest in Bornholm of people from each of 6 regions in Poland



Note: the relative interest is the percent of information requests from each region divided by the percentage of population in Poland in each region.

About two thirds of the passengers of all Polish airports go to and from the capital, and the percentage of passengers concentrated in Warsaw is even higher, if only international passengers are counted. There are more than 500 km to the ferry from the main city in three of the six regions. However, in the most eastern of the six regions, people are relatively poor; furthermore, the distance to the ferry ports is long, so there is little interest in going to Bornholm among people living in this region. In region 2 both the second and third largest airport in Poland are located, namely Krakow and Katowice. There are more people living in Katowice than in

Krakow, and the interest among people living in Katowice is greater than in Krakow, both in absolute and relative terms. There is less than 100 km from Krakow to Katowice, so the whole of region 2 is a catchment area for both of the airports. There is a low cost airline, Wizzair, which has a base in Katowice. From all of Poland, less than 600 information requests were sent to Destination Bornholm in 2005. Since the requests are spread all across Poland, none of the six regional are even close to reaching the minimum of 500 information requests.

We shall now take a more detailed look into the different parts of Poland, by focusing at the 16 voivodships.

Figure 42 Map of the 16 voivodships (counties) of Poland - with abbreviations



Source: http://en.wikipedia.org/wiki/Image:Poland_administrative_division_1999_literki.png

Figure 43 Analysis of Poland by voivodship (county): Population, interest in Bornholm, and km to ferry

Region	Abbreviation	Voivodship	Capital	Population 2004	Population %	Post codes	Requests	Requests%	Interest	Km ferry
1	MA	Masovian (mazowieckie)	Warszawa	5.139.545	13%	00-09	158	27%	2,0	527
1	LD	Łódź (łódzkie)	Łódź	2.592.568	7%	90-99	21	4%	0,5	489
2	MP	Lesser Poland (małopolskie)	Kraków	3.256.171	9%	30-34	29	5%	0,6	728
2	SL	Silesian (śląskie)	Katowice	4.707.825	12%	40-44	49	8%	0,7	654
3	PD	Podlasie	Białystok	1.204.036	3%	15-18	4	1%	0,2	689
3	LU	Lublin (lubelskie)	Lublin	2.187.918	6%	20-24	9	2%	0,3	703
3	SW	Świętokrzyskie Subcarpathian (podkarpackie)	Kielce	1.290.176	3%	25-29	8	1%	0,4	630
3	PK	Rzeszów	Rzeszów	2.097.325	5%	35-39	8	1%	0,2	801
4	WP	Greater Poland (wielkopolskie)	Poznań	3.362.011	9%	60-64	63	11%	1,2	283
4	LB	Lubusz (lubuskie) Western Pomeranian (zachodniopomorskie)	Gorzów Wielkopolski	1.009.177	3%	65-69	20	3%	1,3	217
4	ZP	Szczecin	Szczecin	1.695.708	4%	70-78	64	11%	2,5	143
5	OP	Opole (opolskie)	Opole	1.053.723	3%	45-49	15	3%	0,9	558
5	DS	Lower Silesian (dolnośląskie)	Wrocław	2.895.729	8%	50-59	49	8%	1,1	460
6	WM	Warmian-Masurian (warmińsko-pomorskie)	Olsztyn	1.428.385	4%	10-14,19	9	2%	0,4	417
6	PM	Gdańsk	Gdańsk	2.192.404	6%	80-84,89	49	8%	1,5	247
6	KP	Kuyavian-Pomeranian (kujawsko-pomorskie)	Bydgoszcz	2.067.548	5%	85-88	33	6%	1,0	268
Total				38.180.249	100%		588	100%	1,0	

There is actually more than 100 km from Lodz to Warsaw, and furthermore there is less than 500 km from Lodz to the ferry port in Kolberg. Therefore Lodz is not really part of the catchment area of Warsaw airport. But the interest in Bornholm of people in the Lodz voivodship is very low anyway. With respect to two of the three criteria, Warsaw qualifies:

The airport is within 100 km of the people living in the Warsaw voivodship called Mazowieckie.

1) Even if there are many people living in the Warsaw area, and even if the interest in going to Bornholm is higher than in any other voivodship in Poland, only 158 information requests were received by Destination Bornholm from the Warsaw voivodship.

There should have been three times as many information requests from the Warsaw voivodship, if Warsaw should have fulfilled the requirement of at least 500 information requests – but of course demand may be stimulated by market communication actions.

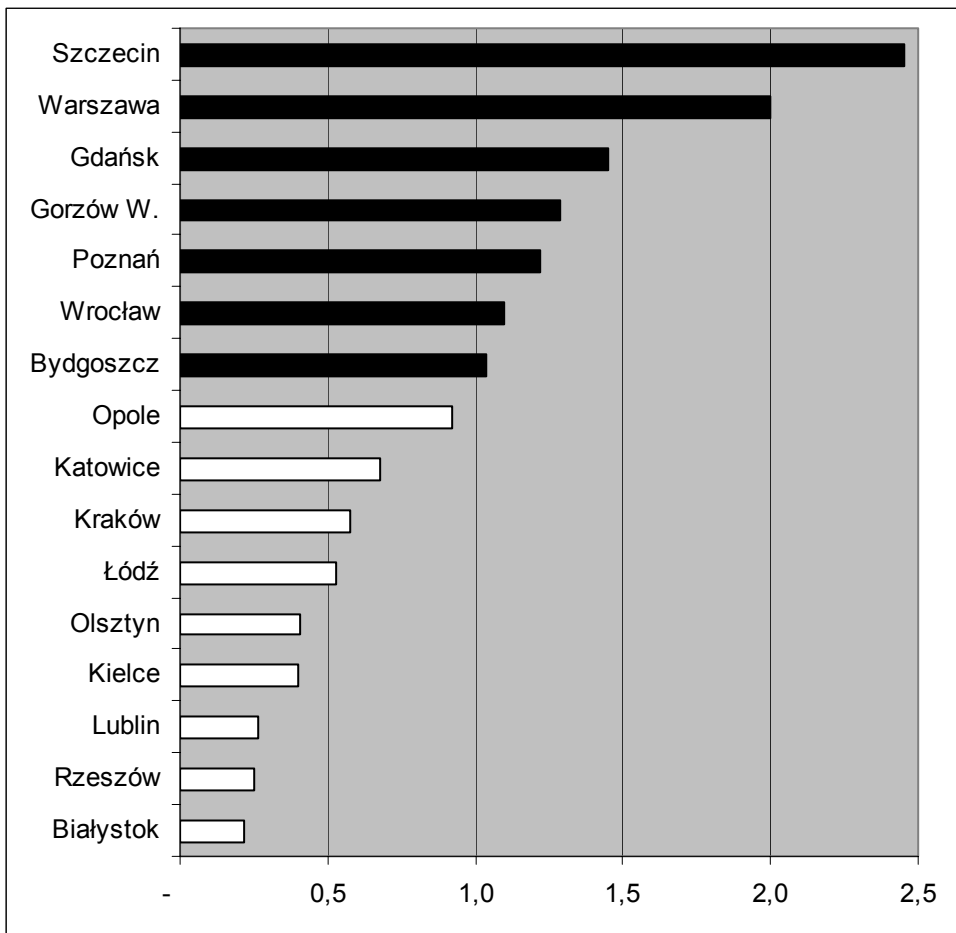
2) There are over five million people living in the Mazowieckie voivodship (Warsaw area), i.e. many times more than the required one million.

3) There is more than 500 km to the ferry port in Kolberg (Kolobrzeg), and even further to Swinoujscie, there is long way to the ferry port, which is a good thing in an airline context.

Before disregarding Warsaw airport as a departure airport for summer flights to Bornholm it should be considered why so relatively few people, even from Warsaw requested information about Bornholm. Is it because they thought they could not get brochures in their own language? Is it because they knew they could not fly to Bornholm, and therefore did not bother getting information about the island, if they did not think they would be going all the way to the ferry port? After all, they would need to drive most of the night to reach the ferry port by car, or go by night train or stay a night in the ferry town of Kolberg or Swinoujscie. Income

levels (GDP per capita), even in Warsaw is just 50% of the EU average, which indicates that not too many people from Warsaw and elsewhere can afford to fly.

Figure 44 Relative interest in Bornholm by each of 16 voivodships in Poland (2005).



Since there is only 79 km from Krakow to Katowice, Krakow and surrounding area can be considered part of the catchment area for Katowice airport. However, there were only 49 information requests from Katowice voivodship and 29 from the Krakow voivodship, i.e. 69 in total. There should have been seven times as many for the "interest criteria" to be fulfilled. However, the two other criteria are fulfilled, like in the case of Warsaw airport:

Krakow is within 100 km of Katowice (and visa versa), and is thereby one catchment area.

- 1) Relatively few people showed interest in Bornholm by requesting information.
- 2) There are 8 million people living within 100 km of Katowice airport.
- 3) There is more than 500 km to the ferry port.

An advertising campaign, along with attractive air travel prices and the mentioning of relatively low cost accommodation offers may be enough to fill a 46 seat propeller plane with passengers to Bornholm five or ten times each summer.



6.1 Seasonality - Poland

For Poles, the holiday season is extremely concentrated in the month of August, with a whopping 69% of the bednights, and 23% in July. This means that six roundtrips per year from Warsaw airport would be enough in the first place, two in July and four in August. Later on the flying season could be prolonged, if there is enough demand, and in the long run flights from Katowice could be considered as well.

One aspect of seasonality is when people from Poland actually come to Bornholm to make holiday. Another aspect is when they request information about the island.

Poles actually start collecting information about the following summer's holiday already in December. Although by the end of June people from Poland have only spent 6,5% of the bednights. From the beginning of January to the end of June they have collected 65% of the information about the given year's holiday (on the island of Bornholm). Additionally another 5% of information was collected already in December ahead of the following year's (summer) holiday. In other words, although people from Poland come to Bornholm in July and especially August, the majority have already decided where to go by the end of June. Airlines say they need time to do the marketing, with good reason: They need time to make the route decisions first, then to prepare the marketing material, then to send it out and/or run the ads.

Figure 45 Hotel guests on Bornholm and information requests by month (2005) – Poland

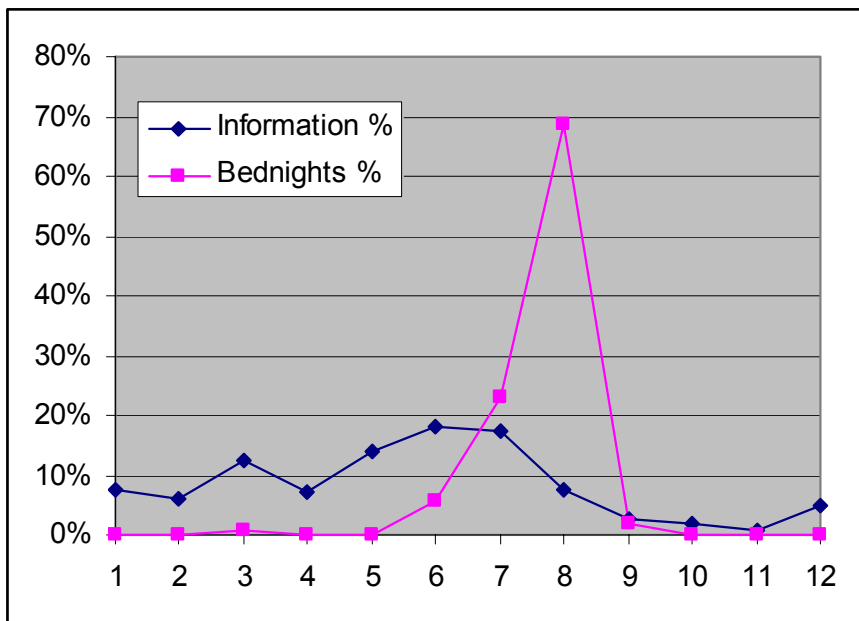
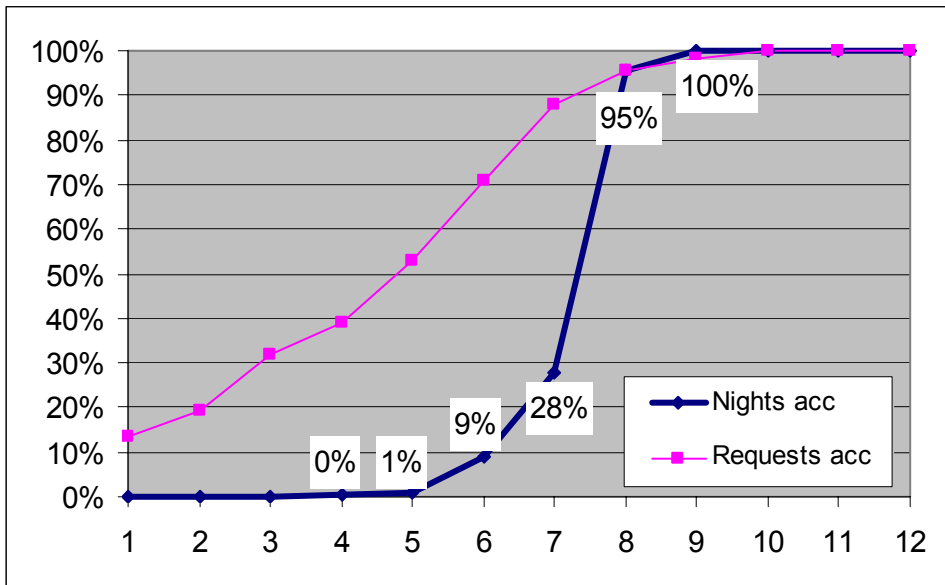


Figure 46 Hotel guests on Bornholm and information requests by month accumulated – Poland



7. Netherlands

1st digit	including these cities:	Requests	Requests %
1	Amsterdam, Almere, Zaandam	38	18%
2	's-Gravenhage, Haarlem	19	9%
3	Rotterdam, Utrecht, Amersfoort	29	13%
4	Eindhoven, Tilburg, Breda	14	6%
5	's-Hertogenbosch	13	6%
6	Nijmegen, Arnhem, Maastricht	20	9%
7	Apeldoorn, Enschede	19	9%
8	Zwolle	34	16%
9	Groningen	30	14%
	Netherlands	216	100%

The only part of the Netherlands where it seems unlikely that people down prefer to drive south west to Amsterdam, instead of east to one of the ferries to Bornholm is the area around Groningen. This would leave 186 information requests, which is only a little more than the minimum required of 500.

The Netherlands is divided into twelve administrative regions, called provinces.¹³

¹³ <http://en.wikipedia.org/wiki/Netherlands>

Figure 47 Map of the Netherlands



Source: http://en.wikipedia.org/wiki/Image:Netherlands_map_large.png

Almost all parts of the Netherlands are within 100 km of Amsterdam Schipool Airport, and the Netherlands can therefore be considered to be one single catchment area.

Even so, the following breakdown of information requests sent to Destination Bornholm in 2005 from different parts of the Netherlands were as follows:

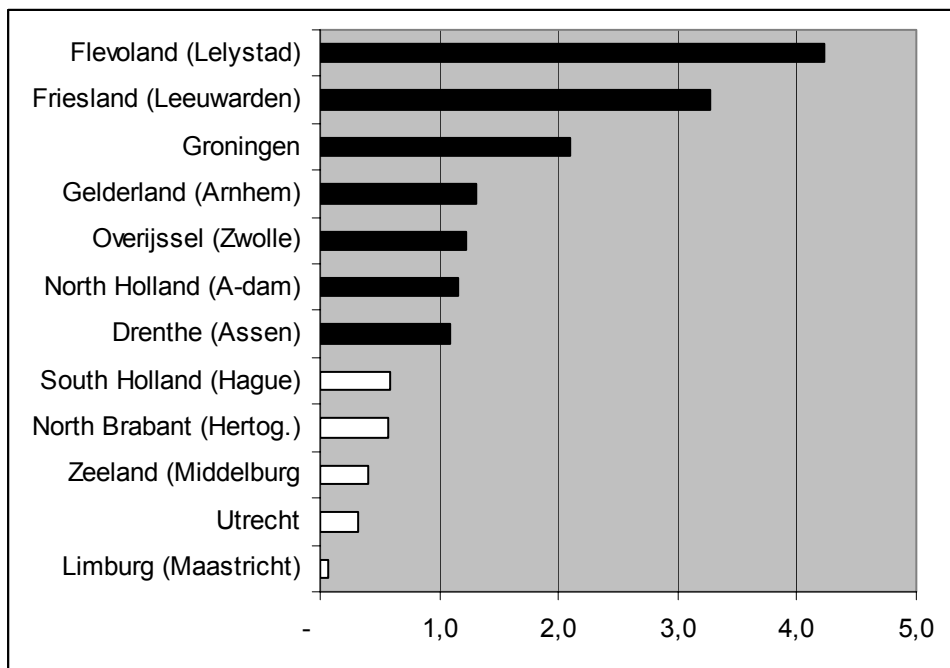
It is thought that Groningen, Friesland and Drenthe would be driving-markets rather than air-markets. Leaving out these three regions (provinces) of the catchment area leaves 14,6 million people (90% of the population) and 165 requests (76% of 216).

Figure 48 Analysis of the Netherlands: Population and interest in visiting Bornholm

Rank	Province	Capital	Population	Population%	Requests	Requests%	Position
1	South Holland	The Hague	3.453.000	21%	27	13%	0,6
2	North Holland	Haarlem	2.583.900	16%	40	19%	1,2
3	North Brabant	's-Hertogenbosch	2.406.900	15%	18	8%	0,6
4	Gelderland	Arnhem	1.967.600	12%	34	16%	1,3
5	Utrecht	Utrecht	1.159.200	7%	5	2%	0,3
6	Limburg	Maastricht	1.143.000	7%	1	0%	0,1
7	Overijssel	Zwolle	1.105.800	7%	18	8%	1,2
8	Friesland	Leeuwarden	642.500	4%	28	13%	3,3
9	Groningen	Groningen	575.900	4%	16	7%	2,1
10	Drenthe	Assen	482.300	3%	7	3%	1,1
11	Zeeland	Middelburg	378.300	2%	2	1%	0,4
12	Flevoland	Lelystad	356.400	2%	20	9%	4,2
Netherlands		Total	16.254.800	100%	216	100%	1,0

Amsterdam Airport	Catchment	14.554.100	90%	165	76%	0,9
-------------------	-----------	------------	-----	-----	-----	-----

Figure 49 Relative interest in visiting Bornholm from different regions in the Netherlands



7.1 Seasonality – Netherlands

Not very many Dutch people stay in hotels (and holiday centres) on Bornholm (indeed it was only 403 bednights or 58 person weeks). So, in the below graphs all types of accommodation used by Dutch tourists visiting Bornholm have been included. For all accommodation types there were over 4900 bednights by Dutch tourists on Bornholm in 2005, i.e. just over 700 person weeks, of which hotels (and holiday centres) only accounted of 8%. The main accommodation type by the Dutch (on Bornholm) is camping (56% of bednights) followed by holiday cottages (41%), sailing boats (35%), and youth hostels (2%). If Dutch people take summer flights to Bornholm, some of them may prefer to stay at camping sites (in tents or camping huts) instead of in hotels, and perhaps go around the island by bicycle. Bicycling on Bornholm is highly recommended by the way.

July and August are about equally important holiday months for the Dutch on Bornholm. By the end of June 72% of the information requested from Destination Bornholm by people from the Netherlands has been received (including 1% received already in November and December in the previous year).

Figure 50 All tourists on Bornholm and information requests by month (2005) – from the Netherlands

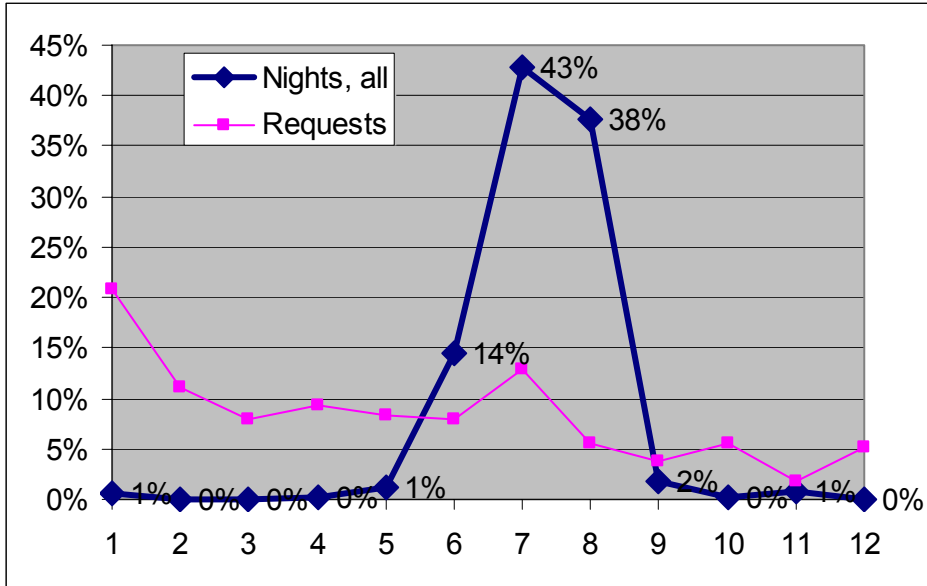
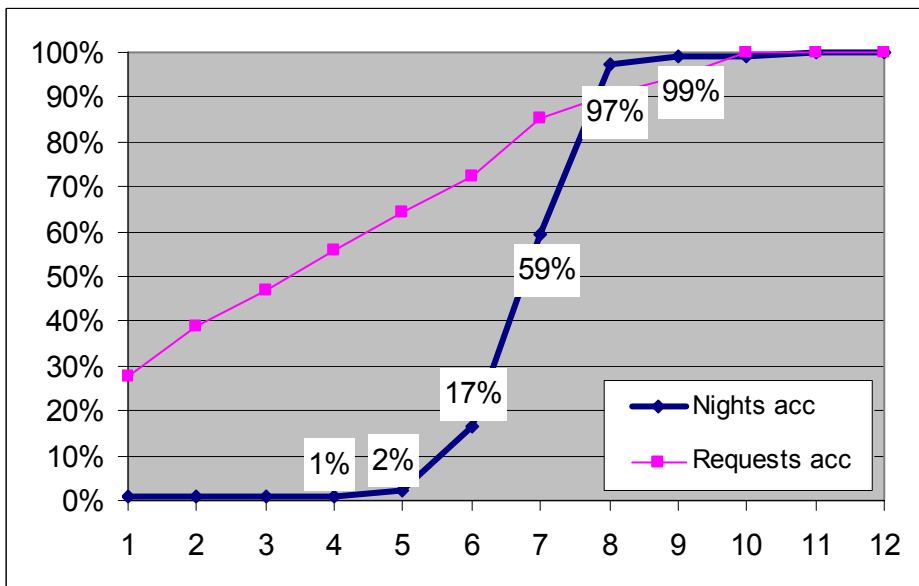


Figure 51 All Dutch tourists on Bornholm - and information requests from the Netherlands by month accumulated

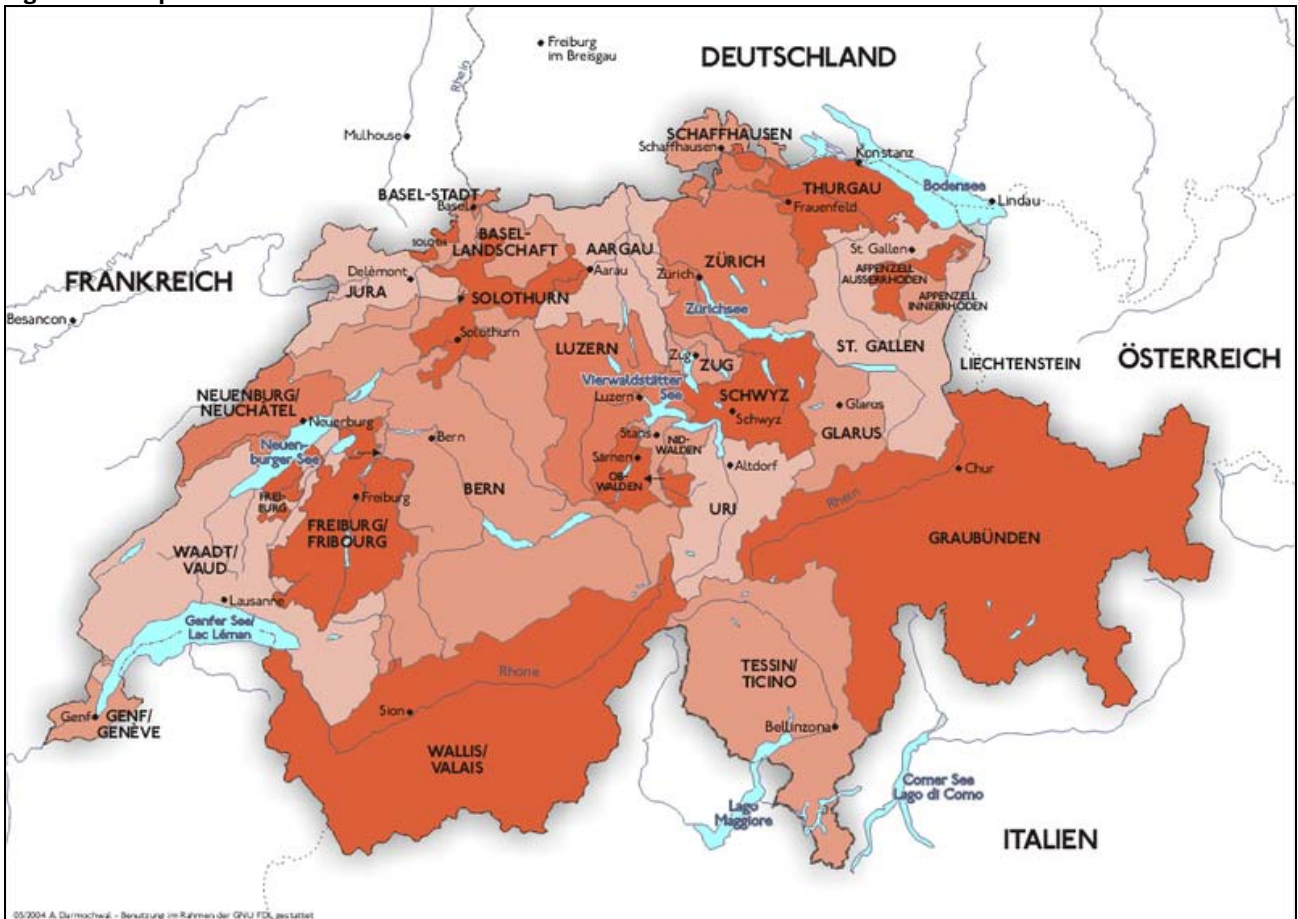


Note: January (accumulated) includes November and December from the previous year.

8. Switzerland

Switzerland is ranking as market number 7, after the top 5 markets (DK, G, S, N, PI) and the Netherlands. However, looking at hotel bednights only, Switzerland is ranking as number 6, with twice as many hotel bednights as the Netherlands. Even so, for every 1000 hotel bednights on Bornholm, only 2 are by Swiss visitors, i.e. largely none at the moment. Switzerland would thus be a new market.

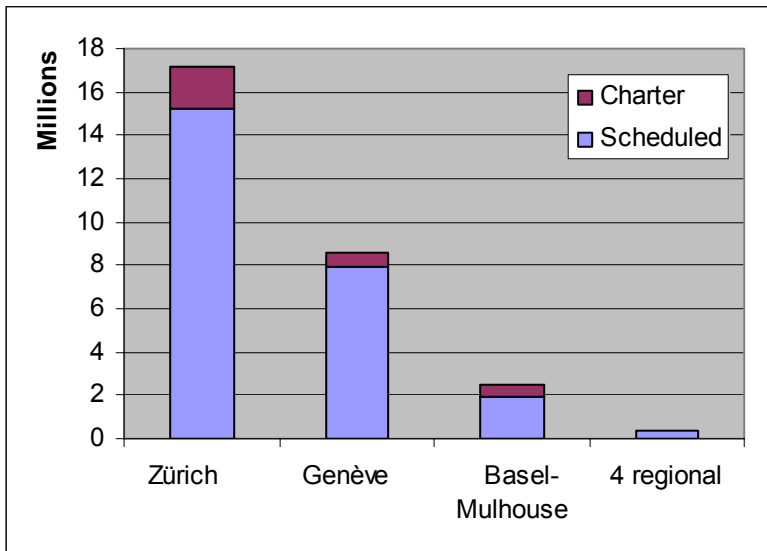
Figure 52 Map of Switzerland



http://en.wikipedia.org/wiki/Image:KARTE_schweiz_verwaltungsgliederung.png

In Switzerland there are three major airports and four small regional airports. Zurich accounted for 60% of passenger volumes, Geneva 30%, Basel-Mulhouse 9% and the four regional airports 1%. 89% of the 28,6 million passengers (2004) are scheduled, 11% charter.

Figure 53 The main airports in Switzerland (2005)



Source: Bundesamt für Statistik, Schweizerische Zivilluftfahrt, Jahresstatistik

Denmark ranks as European country number 14, after Serbia-and-Montenegro (!), but ahead of Russia and Sweden, with respect to number of passengers to/from the top three airports in Switzerland.

Table 17 The top 3 Swiss airports – with respect to passengers to/from Denmark (2004)

	Basel-Mulhouse	Genève	Zürich	Top 3
All countries	1.247.356	4.303.888	8.552.521	14.103.765
Denmark	17.985	81.772	144.571	244.328
Denmark %	1,4%	1,9%	1,7%	1,7%

	Basel-Mulhouse	Genève	Zürich	Top 3
All countries	9%	31%	61%	100%
Denmark	7%	33%	59%	100%

Source: Based on data from Bundesamt für Statistik, www.bfs.admin.ch

Note: There were 487 passengers Lugano-DK in 2004, and *no* passengers Bern-DK.

Now we shall divide the Swiss population into three regions. Each canton has been assigned to either Zurich, Basel or Geneva, according to the lowest distance to each of these three airport cities. Only a few places in Switzerland are farther than one hundred kilometres to one of the three main airports. Next, the 149 information requests received by destination Bornholm from the Swiss in 2005 have been assigned to cantons, and then to the nearest airport.

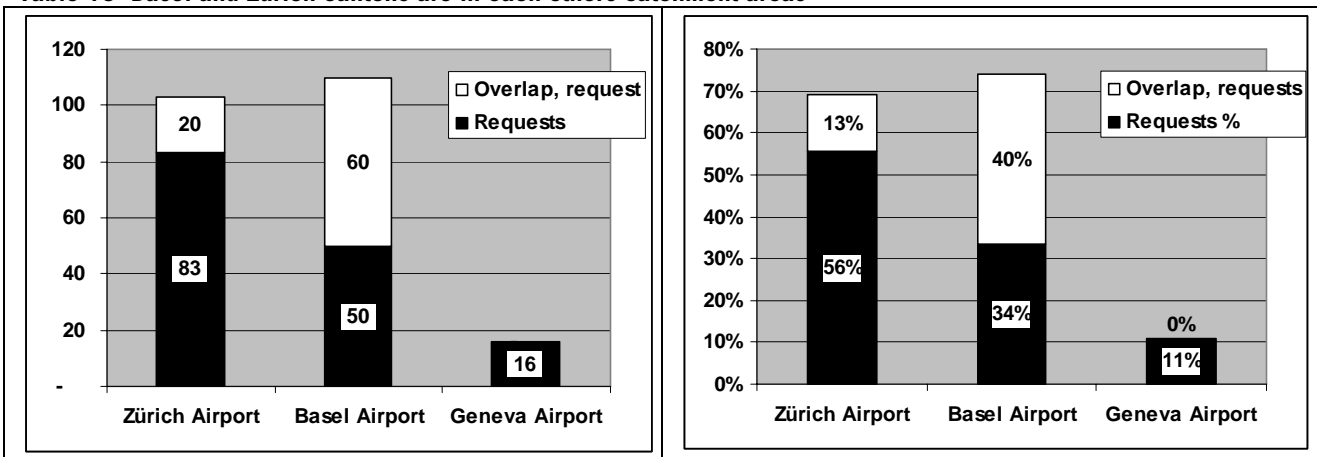
Table 18 The Swiss population and information requests about Bornholm by nearest airport

Airport region	Population	Requests	Population %	Requests %	Relative position	To ferry, km
Zürich Airport	3.827.000	83	53%	56%	1,1	1126
Basel Airport	2.115.440	50	29%	34%	1,2	1129
Geneva Airport	1.318.700	16	18%	11%	0,6	1377
Switzerland	7.261.140	149	100%	100%	1,0	1154

Basel is located within 100 km of Zurich and visa versa. For Zurich Airport, 83 requests came from cantons where Zurich Airport was the nearest of the three. But there were another 20 (all from the Basel Airport area)

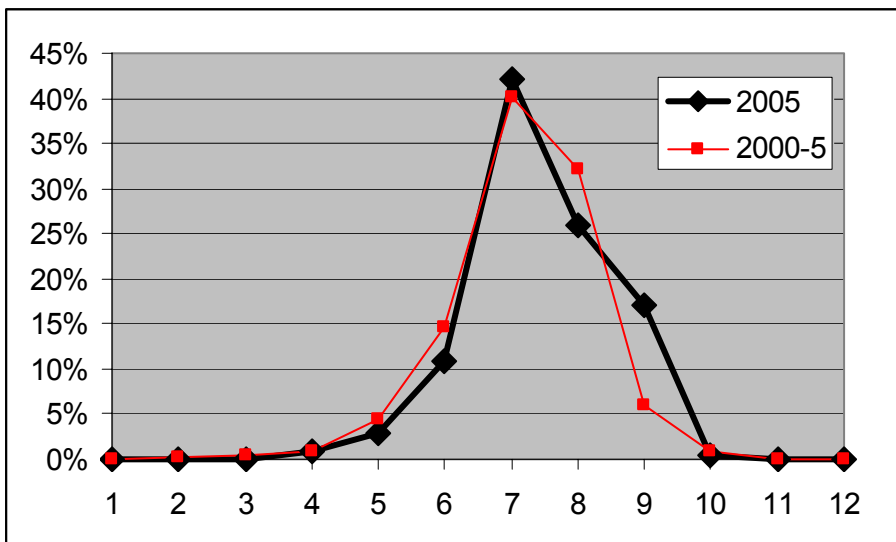
which came from people living within 100 km of Zurich. From the area around Basel Airport there were 50 information requests. It may also be added, that out of the 83 information requests around Zurich Airport, as many as 60 (including all of those for the Zurich canton) came from people living no more than 100 km from Basel. So, theoretically $34\%+40\%=74\%$ of the people interested in visiting Bornholm live either closest to Basel Airport or within 100 km of Basel Airport. For Zurich it is $56\%+13\%=69\%$ who live closest to Zurich Airport or within 100 km of Zurich. However, the historical travel pattern as illustrated by earlier graphs and tables indicates that people who live closer to Zurich than to Basel are unlikely to be willing to travel to Basel to catch an airplane, when there are so many departures from Zurich. But even the 34% of requests and 29% of the population which live closest to Basel Airport indicates a potential for Basel to increase its share of 9% of all passengers from the top three airports.

Table 19 Basel and Zurich cantons are in each others catchment areas



8.1 Seasonality – Switzerland

Figure 54 Season for stays on Bornholm by Swiss tourists in hotels and holiday centres (2005) – and average for the period 2000-2005



July is the high season for Swiss tourists staying in hotels and holiday centres. There are, however, not many of them. Under 1000 hotel bednights or 141 weeks of stay in 2005 (200 person weeks in average for the period 2000-2005). Six roundtrips by full 50-seat airplanes would triple the hotel bednights by Swiss tourists on Bornholm, compared to 2005.

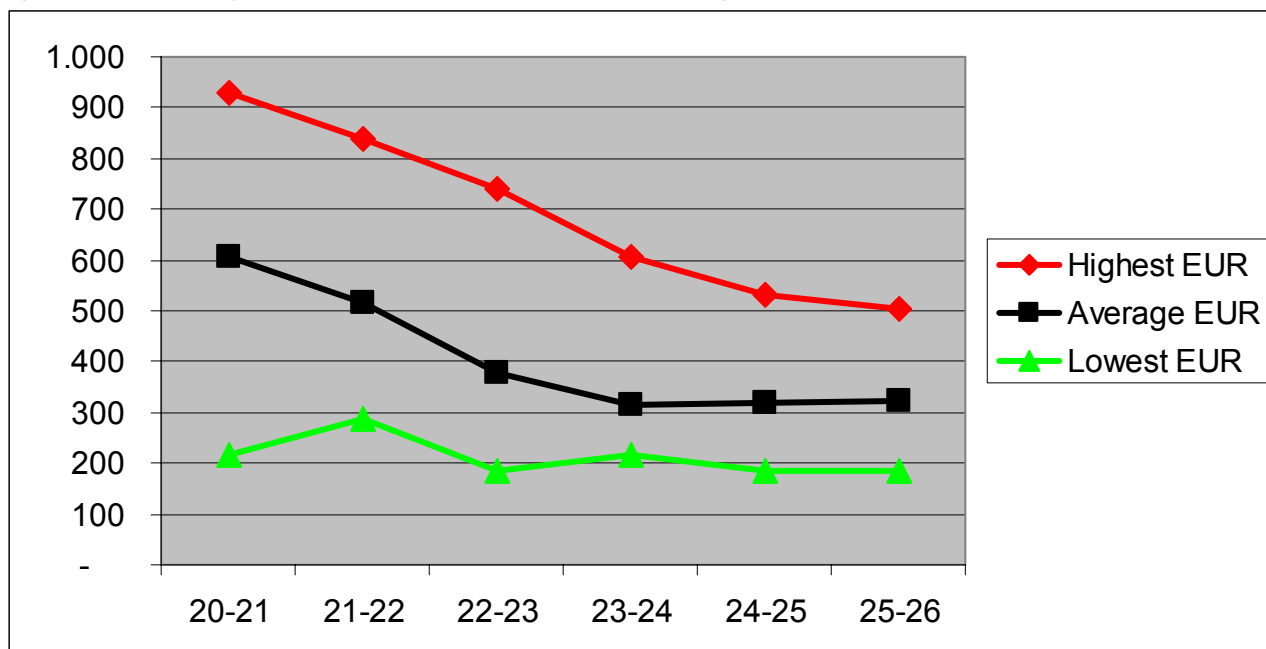
8.2 Switzerland – Copenhagen

The lowest price by Swiss, 24 June – 1 July, Zurich-Copenhagen, found more than one month before departure was CHF 445, corresponding to EUR 285, including all taxes and fees. Swiss cooperates with – or have been acquired by - Lufthansa. Swiss European Air Lines Ltd., a subsidiary of Swiss operates a fleet of 27 jet airplanes, all for under 100 passengers, which would be appropriate for direct flights from Switzerland to Bornholm: Avro RJ100 (20) for 97 passengers each, Avro RJ85 (4 of those) and the Embraer RJ145 (3 of those) for 49 passengers each. The most relevant type of airplane for (weekly) direct flights between Switzerland and Bornholm, if any, would probably be the Embraer RJ145, at least initially.

Tickets from Basel to Bornholm with change of flights in Copenhagen were bookable at the Cimber website (www.cimber.dk) for DKK 2235 return (EUR 300) including taxes and booking fee, for a standard economy ticket, 23 June to 30 June, more than 1 month before departure.¹⁴ However, Basel-CPH by Cimber is available for 187 EUR return, and CPH-Bornholm is available from just 63 EUR return (472 DKK), i.e. EUR 250 in total (www.cimber.dk).

In general, if making a change of flights in Copenhagen, it is worthwhile to check if the price of two separate return tickets is cheaper than one true ticket. Also for SAS it cheaper to buy the ticket Switzerland-CPH return at www.scandinavian.net and then the ticket CPH-Bornholm return at www.cimber.dk rather than a through ticket all the way from Switzerland to Bornholm at scandinavian.net.

Figure 55 Price analysis of the route Zurich-CPH (return including taxes and fees), week 20, 2006



Source: based on price information from www.swiss.com.

¹⁴ Tickets from Zürich to Bornholm with change in Copenhagen were bookable at the SAS website (www.scandinavian.net) for CHF 637,50 return (EUR 411) including taxes and booking fee, for a standard economy ticket, 23 June to 30 July, 5 weeks before departure, or CHF 374 (EUR 241) for Zürich-CPH only.

The total price is the out journey plus the return journey plus fuel surcharge, airport taxes, and a Swiss service fee.¹⁵ The minimum price was CHF 65 out, CHF 65 back, plus a the extras of CHF 159, i.e. CHF 289 or EUR 186 as minimum in total. The average levelled out at about just under CHF 500, or about EUR 320, for bookings made well in advance.

The lowest price by Intersky, 23 June – 30 June, Friedrichshafen-Hamburg, was EUR 262. So, there seems no *price* reason to consider Friedrichshafen in the very south of Germany as an alternative to Zurich as a departure airport for summer flights to Bornholm. And, as mentioned, there is not interest in Bornholm from people in the catchment area around the Friedrichshafen Bodensee Airport to make it relevant as a departure airport for flights to Bornholm. For more about Friedrichshafen, see enclosure 8 for Switzerland.

¹⁵ In cases where at least one leg of the flight in question is offered by one of the two codeshare partners (i.e. by Swiss' subsidiary Swiss European Air Lines or by Scandinavian Airlines) there is a CHF 25 service fee for booking on the Swiss website. Generally, the service fee applied.

9. United Kingdom

Britons accounted for 3,9% of bednights at hotels and holiday centres in Denmark (2005). However, in Copenhagen the share of Britons is as high as 9,1%. In the province, i.e. outside of the capital, the share of Britons in hotels etc. is 1,2%. The share of Britons is however only one eighths of the share of Britons in other regions outside of the capital, namely only 0,15%.

Table 20 Hotel bednights in Denmark and on Bornholm: Relatively few UK bednights on Bornholm

Nationality	Denmark	Copenhagen	Province	Bornholm	
All markets	13.881.826	4.719.457	9.162.369	463.278	hotel bednights
UK market	540.479	431.160	109.319	690	hotel bednights
UK %	3,9%	9,1%	1,2%	0,15%	
Potential for the share of UK hotel guests on Bornholm ~				1,00%	
Bednights should be				4.633	
Missing, bednights				3.943	
Missing, person weeks				563	
Per airplane				78	
Load factor				70%	
Round-trips, by 78-seater airplane				10	

The arguments for flights from the UK to Bornholm go as follows: The share of Britons in hotels on Bornholm should be at least 1%, since it is 1,2% in the province of Denmark overall. There were only registered 690 bednights by Britons in hotels on Bornholm in 2005, but there ought to have been over 4600. I.e. over 3900 bednights, or 563 person-weeks are missing. That would correspond to 10 roundtrips by a 78 seat airplane (for example like the propeller airplanes which Flybe.com has), with a load factor of 70%. Since the season for Britons on Bornholm is short, and since one airport can only serve a limited part of the UK, the number of roundtrips may need to be limited to 5 per season, in the beginning. However, there are not going to be direct flights by Flybe, and therefore hardly by others, during the next few years. People from the UK, are probably prepared to change flights in Copenhagen at the moment, and they will need to do so also in future. So let us look for a while at flights from the UK via Copenhagen to Bornholm.

It is possible to book a through ticket in Scandinavian.net from Heathrow to Bornholm, with change in Copenhagen. The flying time is just 3 hours 30 minutes out, and just 3 hours 15 minutes back. Return prices start at DKK 2370 (EUR 318, £216).¹⁶ Heathrow-Copenhagen is operated by SAS itself, Copenhagen-Bornholm by Cimber. – By booking two separate tickets, on Scandinavian.net and Cimber.dk, respectively, it same itinerary would cost DKK 1379+472=1851 (EUR 185+63=248 or £127+43+169). On the same dates, London Stansted – Copenhagen, return, was £80.39 (DKK 881, EUR 118) – including the tricky extra £4 fee for credit card payment, which is added only by the very end of the booking procedure. So, by combining Easyjet and Cimber it is possible to travel from London Stansted via Copenhagen to Bornholm for £123 (EUR 182, DKK 1353). So, a savings of 43% (DKK 1017, £93 or EUR137) can be made by going on bargain hunting on separate websites. Sterling, who flies London Gatwick - CPH for £82 largely matches the price of Easyjet, flying on the same dates, and by being flexible with the dates the lowest Sterling ticket is just £65 (EUR for London Gatwick – CPH).¹⁷

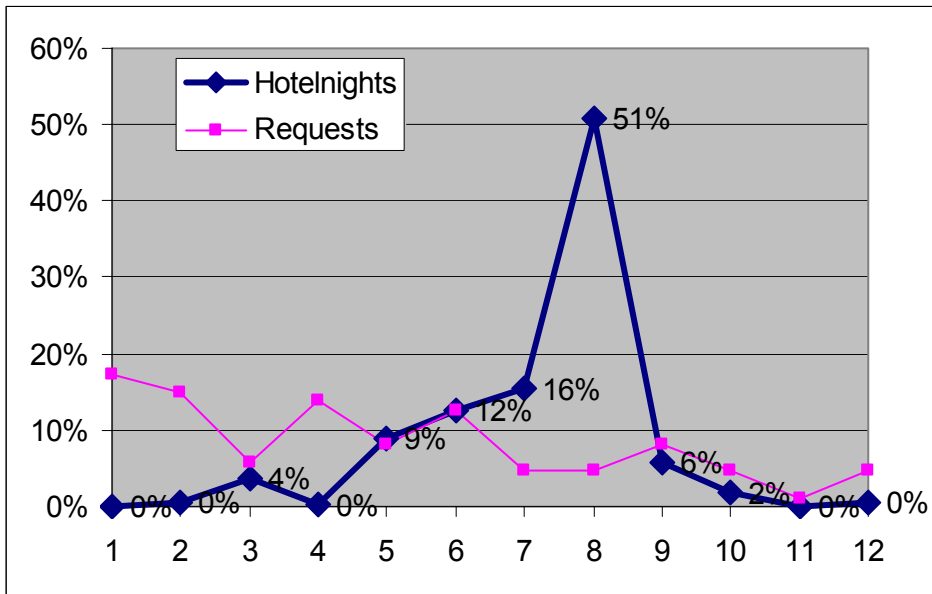
So, the cheapest return flight from the London area to Copenhagen is by Sterling £65 return (DKK 713, EUR 96), plus Cimber from Copenhagen to Bornholm return for £43 (DKK 427, EUR 63), in total: London – Bornholm via Copenhagen, on two separate tickets, booked online £108 (DKK 1185, EUR 159). So, Bornholm is reachable at an affordable price from the UK, albeit via Copenhagen, and not many departures are available at this lowest price. To establish direct flights from London to Bornholm is not feasible in the

¹⁶ Found more than one month before departure (19th May), out 24th June, return 27th June 06

¹⁷ Found 19 May '06: Out Wednesday 21 June, return Tuesday 27 June

near future, unless Sterling or another airline would like to make four or more return flights in August, for EUR 159 (or EUR 200) return.

Figure 56 Half of the British hotel guests visit Bornholm in August



10. Austria

There were only 50 information requests to Destination Bornholm from Austrians in 2005. About half of them were from within the catchment area of Vienna Airport, which results in a ranking below the top 20 potential departure airports for flights to Bornholm.

If there were very cheap flights from Vienna to Bornholm, it could not be ruled out that Austrians would consider flying to Bornholm. One low cost airline (SkyEurope) tries to serve the Vienna-Copenhagen route from Bratislava, but from Slovakia itself there was not even one single information request sent to Destination Bornholm in 2005, so there is no reason to approach SkyEurope about the possibility of flying to Bornholm; what is more they do not have small propeller planes in their fleet anymore, but instead purely B737s, which are too big for what would be a very marginal route.

For Bornholm island, Austria is a camping market, with 80% of bednights, only 15% hotels etc. and 5% youth hostels. Below the top 6 markets, bednights in Denmark are not registered for the accommodation type *holiday cottages*. Many Germans stay in holiday cottages in Denmark, and so could Austrian, but holiday cottages are not as an interesting accommodation in connection with flights to Bornholm, since holiday cottages are generally quite remotely located. However, if combined with rental cars or bicycles holiday cottages are not totally irrelevant, but it is a marginal type of accommodation in connection with flights.

The earlier mentioned airport of Friedrichshafen, located in the south of Germany is not relevant as a departure airport for Austrians to Bornholm, cf. chapter about Switzerland. Direct international flights from Austria to Bornholm are out of the question. But airlines who would make trough tickets to Bornholm with a single change in Germany or Copenhagen would be a possibility (e.g. Air Berlin including Niki, or Austrian Airlines).

11. Italy

Figure 57 The 20 regions of Italy



Source: <http://www.big-italy-map.co.uk/>

Table 21 Geographic analysis of the Italian market: Population and interest in Bornholm by regions (A)

Main part	Main city	Population in re	Requests	Population %	Requests %	Position
North	Milan (Milano)	25.882.796	59	45%	79%	1,7
Middle	Rome (Roma)	12.618.551	13	22%	17%	0,8
South	Naples (Napoli)	18.963.190	3	33%	4%	0,1
Italy	Total	57.464.537	75	100%	100%	1,0

Zone	Main city	Population	Requests	Population %	Requests %	Position
Italia Nord Occidentale	Milan (Milano)	15.133.085	35	26%	47%	1,8
Italia Nord Orientale	Venice (Venezia)	10.749.711	24	19%	32%	1,7
Italia Centrale	Rome (Roma)	10.980.912	13	19%	17%	0,9
Italia Meridionale	Naples (Napoli)	13.947.599	2	24%	3%	0,1
Italia Insulare	Palermo	6.653.230	1	12%	1%	0,1
Italy	Total	57.464.537	75	100%	100%	1,0

Table 22 Geographic analysis of the Italian market: Population and interest in Bornholm by regions (B)

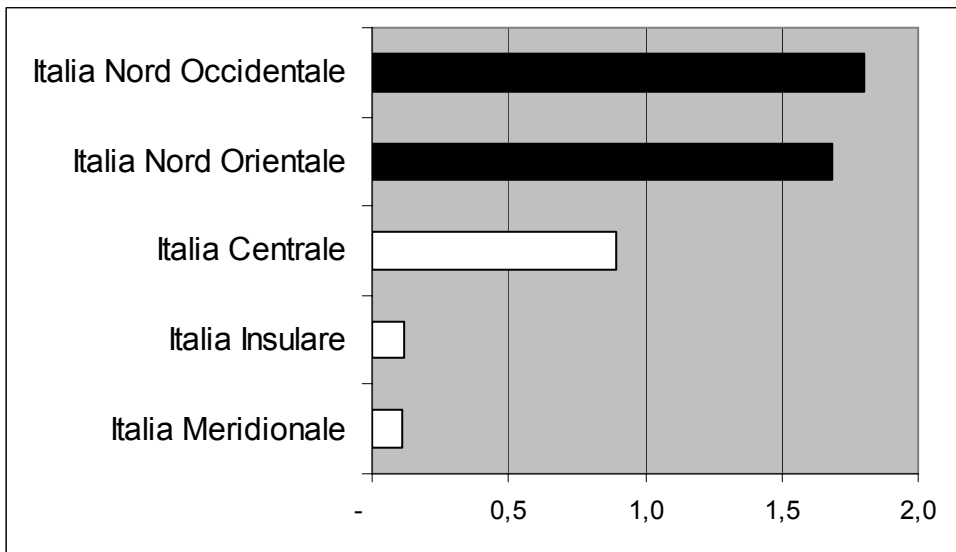
Region	Capital	Population	Requests	Population %	Requests %	Position
Lombardy (Lombardia)	Milan (Milano)	9.108.645	28	16%	37%	2,4
Piedmont (Piemonte)	Turin (Torino)	4.331.334	6	8%	8%	1,1
Liguria	Genoa (Genova)	1.572.197	-	3%	0%	-
Aosta Valley (Val d'Aoste)	Aosta (Aoste)	120.909	1	0%	1%	6,3
Veneto	Venice (Venezia)	4.577.408	9	8%	12%	1,5
Emilia-Romagna	Bologna	4.030.220	4	7%	5%	0,8
Friuli Venezia Giulia	Trieste	1.191.588	4	2%	5%	2,6
Trentino-South Tyrol	Trento	950.495	7	2%	9%	5,6
Latium (Lazio)	Rome (Roma)	5.145.805	5	9%	7%	0,7
Tuscany (Toscana)	Florence (Firenze)	3.516.296	5	6%	7%	1,1
Marches (Marche)	Ancona	1.484.601	2	3%	3%	1,0
Umbria	Perugia	834.210	1	1%	1%	0,9
Campania	Naples (Napoli)	5.725.098	1	10%	1%	0,1
Apulia (Puglia, or Puglie)	Bari	4.023.957	1	7%	1%	0,2
Calabria	Catanzaro	2.007.392	-	3%	0%	-
Abruzzo (was Abruzzi)	L'Aquila	1.273.284	-	2%	0%	-
Basilicata	Potenza	596.821	-	1%	0%	-
Molise	Campobasso	321.047	-	1%	0%	-
Sicily (Sicilia)	Palermo	5.015.591	1	9%	1%	0,2
Sardinia (Sardegna)	Cagliari	1.637.639	-	3%	0%	-
Italy	Total	57.464.537	75	100%	100%	1,0

The 100 km catchment area of Milan includes 9,1 million people (16% of the population of Italy), and there were 28 destination information requests sent from Lombardia to Destination Bornholm in 2005 (37% of all information requests from Italy).

Italy is ranking as market number 11 in terms of bednights (2005). Italian cruise ship visitors are of some importance to Bornholm at the moment, but other types of Italian tourists are almost totally absent.

There are charter flights from Bornholm to Trieste, starting in 2006. However, from the north-eastern most region Friuli Venezia Giulia (with 1,2 million people or 2% of the population in Italy) where Trieste is located only four information request were received by Destination Bornholm in 2005 (5% of the request from Italy). The current interest in Bornholm is thus very low in the region, and it seems very unlikely that any significant number of empty seats could easily be sold on the returning charter plane from Trieste to Bornholm.

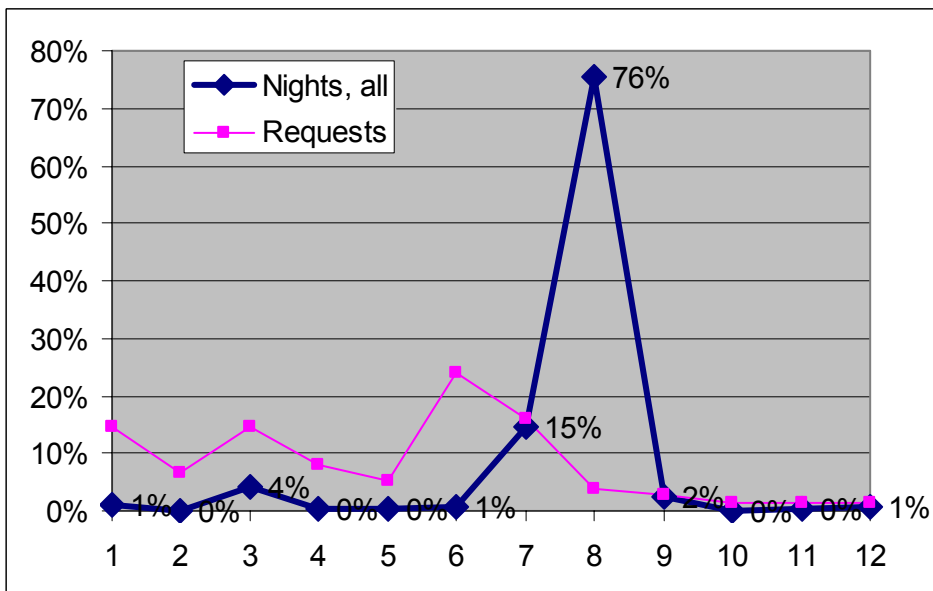
Figure 58 Relative position of Bornholm in the 5 zones in Italy



11.1 Seasonality – Italy

Since there are only few hotel bednights by Italians on Bornholm, camping has been included in the bednights of Italians on Bornholm in 2005. Of some 500 bednights, just 71 person-weeks, 36% were in hotels, 3% in youth hostels and 61% was camping. For all accommodation types August is the main holiday month: For hotels 59% of the Italians came in August, 77% for youth hostels, and 85% for camping. Overall: 76% of Italian bednights on Bornholm are in August.

Figure 59 Italians visit Bornholm in August, if they come



Note: The graph shows the season for all types of accommodation, not only hotels

12. Finland

Figure 60 The 6 provinces of Finland

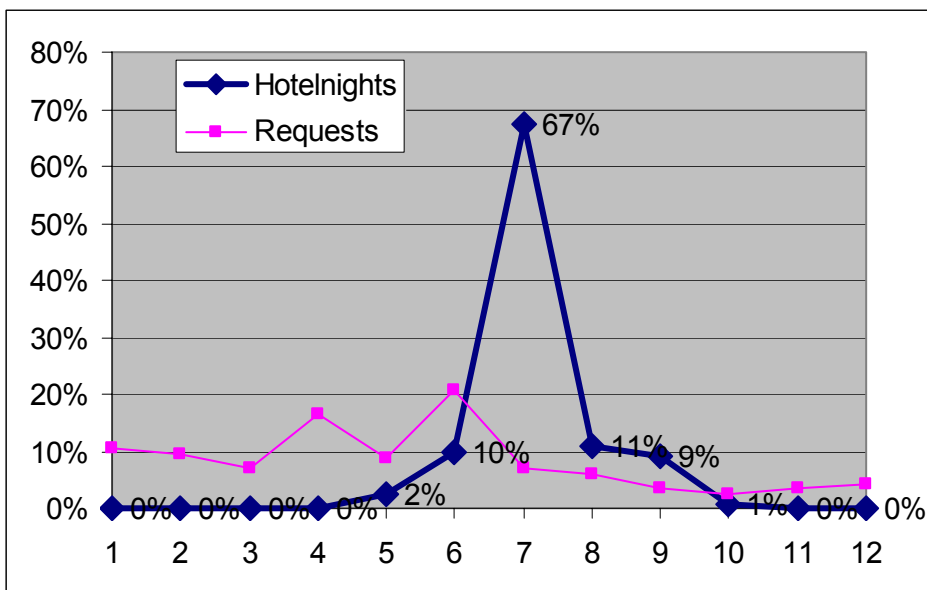


Source: <http://en.wikipedia.org/>

Table 23 Population by province in Finland – and interest in visiting Bornholm

Provinces	Population ('02)	Population %	Requests	Requests%	Rel. position
1. Southern Finland	2.095.416	40%	65	57%	1,4
2. Western Finland	1.839.581	35%	35	30%	0,9
3. Eastern Finland	588.106	11%	6	5%	0,5
4. Oulu	461.000	9%	4	3%	0,4
5. Lapland	187.777	4%	0	0%	-
6. Åland	26.711	1%	5	4%	8,5
Total	5.198.591	100%	115	100%	1,0

Figure 61 Finns come to Bornholm in July, if they come



Finns accounted for 0,8% of bednights at hotels and holiday centres in Denmark (2005).

In Copenhagen, however, the share of Finns is 1,5%. In the province, i.e. outside of the capital, the share of Finns in hotels etc. is 0,4%. The share of Finns is only one tenth of the share of Finns in other regions outside of the capital, namely only 0,04%.

Table 24 Finns accounted for a much smaller percentage of bednights on Bornholm than in other parts of Denmark *outside of the capital (province)*

Nationality	Denmark	Copenhagen	Province	Bornholm
All	13.881.826	4.719.457	9.162.369	463.278
Finland	108.037	72.136	35.901	165
Finland %	0,8%	1,5%	0,4%	0,04%

The arguments for flights from Helsinki to Bornholm go as follows: The share of Finns in hotels on Bornholm should be 0,4% like in the province of Denmark overall. There were only 165 bednights registered by Finns in hotels on Bornholm in 2005, but there should have been 1815. I.e. 1650 bednights, or 236 person-weeks are missing. That would correspond to 5 roundtrips by a 70 seat airplane (like ATR 72 of which Finnair has got 8), with a load factor of 67%, or 7 roundtrips by a 47 seat airplane (like to SAAB 200 of Blue1) with a load factor of 72%.

Finnair, however, has never discussed summer flights to Bornholm. The demand is thought to be too little and the risk too high. Finnair will not fly if no tour operator will share the risk. Aurinkomatkat, the tour operator subsidiary of Finnair will only offer tours in northern Europe by regular Finnair flights. But if Aurinkomatkat approaches Finnair and see a market - with for example golf as an activity which Aurinkomatkat does promote on its website – the Finnair may fly a scheduled or a charter flight. The season of Finnish hotel guests staying on Bornholm is very much concentrated in the month of July, with 67% of the bednights.

From Finland, for example from Helsinki, there is the longest travel time by surface transport to Bornholm, namely around 19 hours, and even if Finns are interested in visiting Bornholm, they don't come.¹⁸ Whereas there are rather frequent cruises from Helsinki to Gotland, there are no such cruises from Helsinki to Bornholm.¹⁹ The cruise ship is an opportunity for Finns to visit Gotland. There are no flights from Helsinki to Gotland, and no flights from Helsinki to Bornholm either, but whereas there is an alternative direct way of getting from Helsinki to Gotland (namely by the cruise ship), this is not the case for Helsinki-Bornholm.

¹⁸ The flying time would be less than 2 hours.

¹⁹ www.5stars-of-scandinavia.com/cruises/kristina_mariehamn.htm

13. Other international markets

About the remaining top 20 markets for Bornholm by number of bednights in 2005 the following remarks can be made:

Czech Republic: The Czechs don't stay in hotels at all on Bornholm, but almost always go camping (94%), and the rest stay in youth hostels (6%). This indicates that the Czechs could not afford to fly to Bornholm, even if there were flights.

USA and Spain: Americans and Spaniards would need to change in Copenhagen. Visitors from both nations stay in hotel on Bornholm, if they come.

Slovakia: See comments under Austria. Slovaks could go on a SkyEurope flight to Copenhagen, where they could catch the IC Bornholm train to Ystad and from there go by ferry to Bornholm. Perhaps surprisingly, 85% of Slovaks stayed in hotels in Bornholm, 15% went camping. With 362 bednights in 2005, it amounted to 52 person-weeks altogether.

14. Denmark – the domestic market

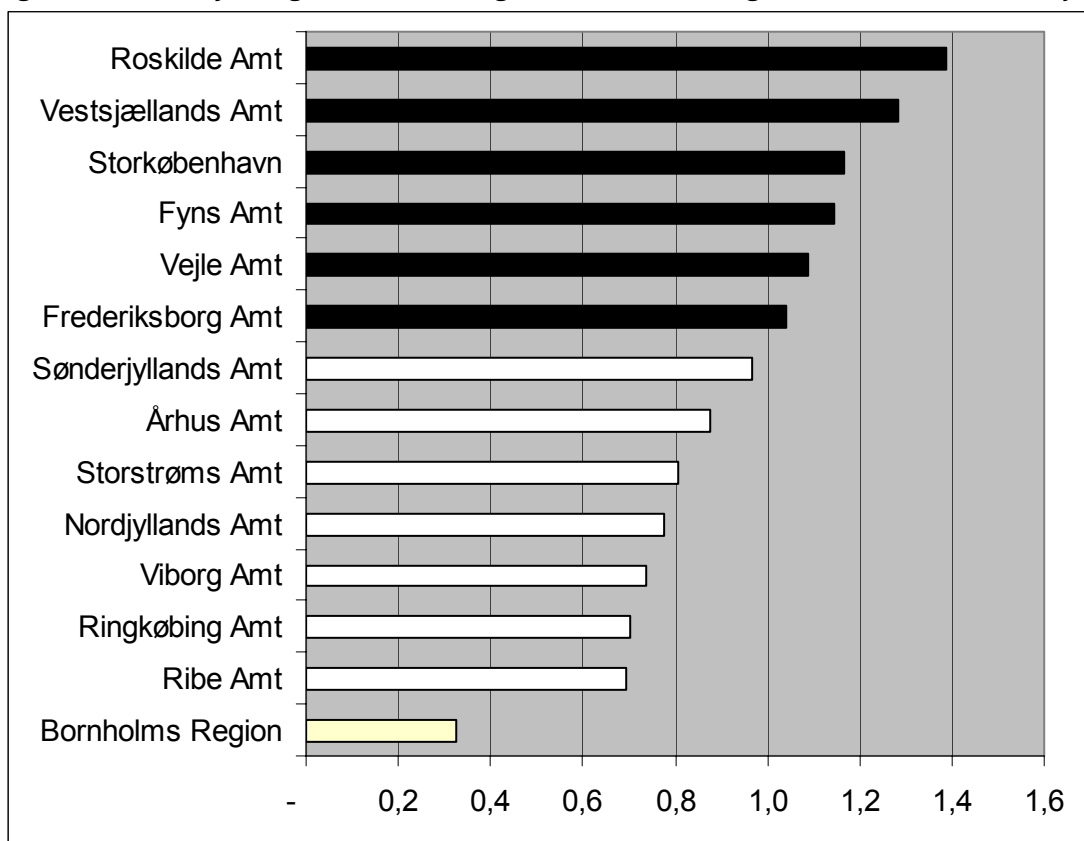
In a comparison of (a) the different counties' share of the population in Denmark and (b) the share of those who visited – or rather showed interest in visiting – Bornholm in 2005 it turns out - as expected - that Bornholm has a relatively strong position in Greater Copenhagen and most other parts of Zealand, as well as in Funen and Vejle counties.

Table 25 Analysis for Denmark: Percent of population and percent of people interested in visiting Bornholm by county (2005)

County	Population	% of popula.	Info. requests	% requests	Position
Copenhagen Municipality	501.664				
Frederiksberg Municipal.	91.721				
Copenhagen County	618.407				
Greater Copenhagen	1.211.792	22,5%	3.095	26,2%	1,2
Frederiksborg County	373.688	6,9%	853	7,2%	1,0
Roskilde County	237.089	4,4%	722	6,1%	1,4
Vestsjællands County	302.479	5,6%	850	7,2%	1,3
Storstrøms County	261.884	4,9%	462	3,9%	0,8
Bornholms Region	43.774	0,8%	31	0,3%	0,3
Funen County	475.082	8,8%	1.191	10,1%	1,1
Sønderjyllands County	252.936	4,7%	536	4,5%	1,0
Ribe County	224.595	4,2%	342	2,9%	0,7
Vejle County	355.691	6,6%	850	7,2%	1,1
Ringkøbing County	274.830	5,1%	424	3,6%	0,7
Århus County	653.472	12,1%	1.255	10,6%	0,9
Viborg County	234.659	4,3%	379	3,2%	0,7
Nordjyllands County	495.669	9,2%	842	7,1%	0,8
Total, Denmark	5.397.640	100%	11.832	100,0%	1,0
Billund Airport area	1.743.247	32%	3.250	27%	0,9

Note: Population is as of 1.1.2004 according to Statistical Yearbook for 2005.

Figure 62 Relatively strong interest in visiting Bornholm from the regions Zealand, Funen and Vejle County



Source: Based on over 11.800 requests sent to Destination Bornholm in 2005.

In a e-mail based survey (by CRT in association with Destination Bornholm) it turned out that 78% of those who requested information material about Bornholm back in 2004 actually visited Bornholm in 2004. There is a strong correlation between number of information requests and number of actual visitors.

Table 26 Top 17 post code areas in Denmark by share of people interested in visiting Bornholm

Rank	Post code	City	Frequency	Precent
1	4000	Roskilde	222	1,9
2	2300	København S	194	1,6
3	2100	København Ø	172	1,5
4	6000	Kolding	152	1,3
5	8600	Silkeborg	151	1,3
6	2000	Frederiksberg	149	1,3
7	4600	Køge	137	1,2
8	2650	Hvidovre	136	1,1
9	4200	Slagelse	117	1,0
10	8900	Randers	117	1,0
11	4700	Næstved	114	1,0
12	7100	Vejle	108	0,9
13	2610	Rødovre	107	0,9
14	2770	Kastrup	107	0,9
15	2730	Herlev	105	0,9
16	2750	Ballerup	105	0,9
17	7000	Fredericia	105	0,9
717		Others	9.534	80,6
734		Total	11.832	100,0

14.1 Seasonality – Danes on Bornholm.

The split of the information requests from Danes and bednights by Danes in 2005 to Destination Bornholm was distributed on the individual months as shown in the below graph.

Figure 63 Hotel guests on Bornholm and information requests by month (2005) – Danes

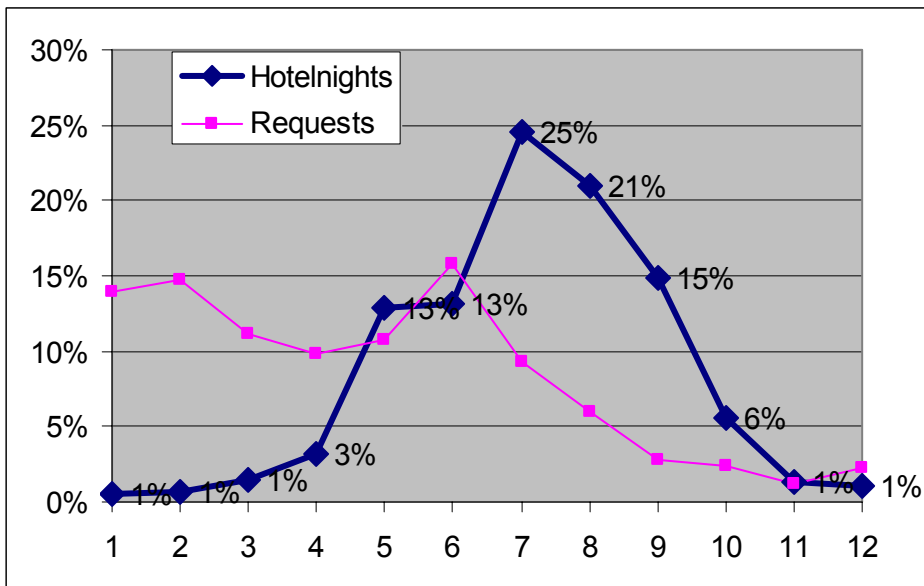
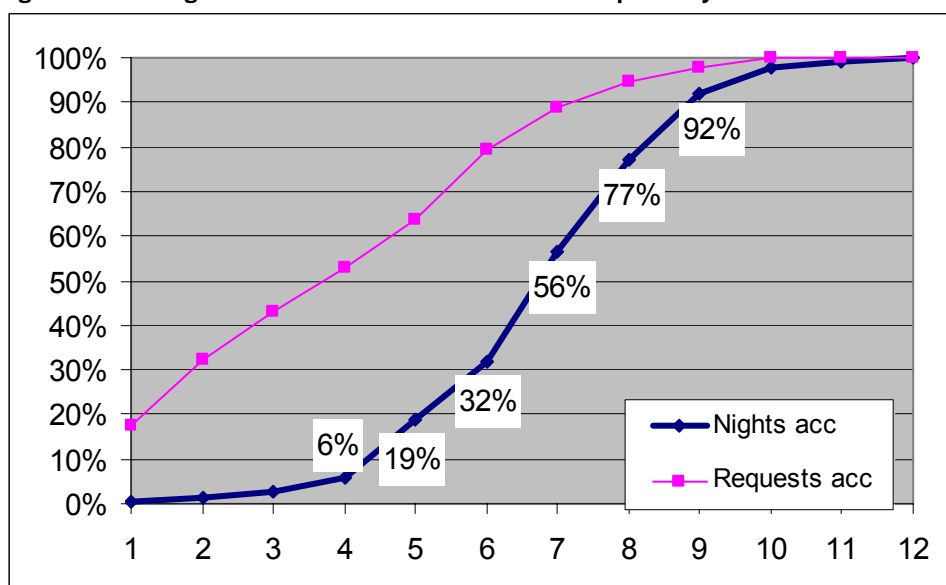


Figure 64 Hotel guests on Bornholm and information requests by month accumulated – Danes



Note: January (accumulated) includes November and December from the previous year.

The above graph shows that by the end of April, over 50% of the information collection for the summer season has been undertaken. This accumulated percentage of information requests includes November and December from the previous year.

14.2 Summary about the Danish market

From Jutland, namely from Billund by Cimber Air, there will actually be a summer route from 2006.

- 1) With 3250 information requests from the 5 counties closest to Billund airport, the interest in visiting Bornholm is far over the threshold of 500, but on the other hand the short distance to Ystad will tend to limit the interest of holiday makers from the centre of Jutland in flying to Bornholm.
- 2) There are 1,74 million people living in the five counties where the main city is no more than 100 km from Billund Airport. This however, includes Vejle county. Billund is part of Vejle county and therefore people from Vejle county should tend to fly from Billund airport, however, Vejle city is only 322 km from Ystad (to which may be added another 100 km to account for the two bridges with charges). There are 99 km from Århus to Billund airport, so Århus is within the catchment area of Billund Airport.
- 3) From the main city in Jutland, Århus, there are 392 km via Odense to Ystad. Since there are two toll bridges on the way, the bridges can make up for the "missing" 108 km up to the minimum of 500, so there is a pass for distance.

There will actually be three roundtrips per week during the summer half from Billund directly to Bornholm by a Cimber Air jet airplane for 50 passengers.

Aalborg Airport:

- 1) From North Jutland county, with Aalborg as the main city, there were 842 information requests, i.e. more than the minimum of 500.
- 2) The population basis in North Jutland county is however only half a million, i.e. only half of the "required" one million. On all three requirements, except the population basis, Aalborg Airport qualifies for a weekly roundtrip by a propeller plane directly to Bornholm Airport.
- 3) Aalborg is the only major regional airport in Denmark, which is actually more than 500 km from Ystad (without adding anything to account for the bridges).

15. What airlines are well positioned to fly to Bornholm, from where

The following general statements can be made about which airlines could fly to Bornholm:

- Airlines which currently fly to Bornholm on domestic routes are candidates for establishing direct, international flights to Bornholm.
- Any airline which currently flies from given airports in Germany to Sylt or Usedom is a candidate for flying to Bornholm, from the same airports, at about the same prices.
- An airline which flies from Oslo to Gotland is a candidate for flight service from Oslo to Bornholm, at about the same prices, and during the same number of weeks.
- An airline which flies from Stockholm to Gotland or to the Estonian island of Ösel is a candidate for flying from Stockholm Bromma or Stockholm Arlanda to Bornholm.
- An airline from the Netherlands, Poland, Switzerland or Finland (or again: Scandinavia, Germany), which has got airplanes with about 50 seats or slightly larger, would be a candidates for having direct summer flight service to Bornholm.

Airlines currently operating at Bornholm Airport:

- Cimber Air and DAT currently serves domestic routes to Bornholm. A third airline, Klippefly has got smaller airplanes, which are used for excursion flights around the island as well as for charters.
- Cimber Air has got several other domestic routes (from Billund and Aalborg to CPH) as well as routes from Denmark to Norway, Sweden, Germany, Poland, Switzerland and more.
- DAT has got routes between Denmark and Norway as well as domestic routes in Norway, and a route from Billund to Lithuania, plus charter flights.

Germany. Both Air Berlin and HLX flies to Sylt in Germany with quite large jet airplanes:

- Air Berlin flies from Berlin/Tegel and Düsseldorf to Sylt by A320 airplanes with 180 passenger seats. Prices are around EUR 100, return. Air Berlin also flies to CPH, from Hamburg, Berlin and Düsseldorf.
- HLX flies from Hanover, Cologne/Bonn and Stuttgart by Boing 737 airplanes to Sylt with about 144 passenger seats. Prices range from EUR 100 to EUR 200, return. HLX also flies to Stockholm.
- Lufthansa CityLine flies from Hamburg and Munich to Sylt, and other Lufthansa Regional partners fly from Düsseldorf, Frankfurt and Stuttgart to Sylt, all with airplanes with from around 50 to 70 seats. In the spring prices ranges from EUR 116 to EUR 237 for flights in the last week of June. Later prices at EUR 99 could be found.²⁰
- Cirrus Airlines flies from Berlin Tempelhof, Mannheim and Saarbrücken to Sylt, using the Dornier 328 airplane with 33 seats. Cirrus Airlines flies to Usedom from the same departure airports using a Dash 8-300 airplane with 50 seats on Sundays, and on a weekday using the Dornier 328.
- Dauair flies to Heringsdorf on Usedom (east of Sassnitz) in cooperation with some hotels on the island from Münster/Osnabrück and Dortmund on Saturdays using the Saab 340B airplane with 33 seats.
- OLT flies from Bremen to Sylt (in cooperation with a travel agent), as well as from Bremen to CPH. OLT has got 50 and 33 seat SAAB airplanes, as well as smaller planes.
- Several additional airlines flies to Sylt, but with airplanes with less than 25 seats.

Norway:

- Wideroe, a subsidiary of SAS, has got summer flights both to Gotland and to the Shetland Islands, from Oslo Gardermoen.
- Also, both Cimber and DAT have got routes between Denmark and Norway.

²⁰ According to the Danish press Lufthansa Regional, specifically Lufthansa City Line, is considering flying from Hamburg to Bornholm.

Sweden:

- Skyways flies both to the Swedish island of Gotland and to the Estonian island of Saaremaa (Ösel), from Stockholm. Also, Skyways flies to Arlanda, Copenhagen and Visby from Linköping. Skyways has three types of airplanes: The SAAB 2000 with 58 seats, the Fokker 50 with 50 seats and the SAAB 340 with about 35 seats.
- Cimber is flying on the route Copenhagen-Norrköping and Copenhagen-Norrköping-Visby (three times per week). Cimber could perhaps fly Norrköping-Bornholm once or twice a week.
- City Airline AB flies from Gothenburg to Gotland once or twice a week during the summer season by one of its three 49 seat Embraer jet planes. City Airline also operates three 37 seaters of the same make.

Other markets:

- Amsterdam, Netherlands: KLM City Hopper operates a fleet of 16 Fokker 50 planes (50 passengers), 21 Fokker 70 planes (80 passengers) and 16 Fokker 100 planes (103 passengers each). KLM makes all decisions for scheduled routes including the Fokker 50 and larger Fokker planes operated by KLM City Hopper.
- Warsaw, Poland: EuroLOT has got a fleet of 5 ATR-42-500 with 46 seats each, and 8 ATR-72 with 64 seats. The two rounds per week by the ATR-42 would do. Since the Polish tourists may not be able to afford to stay a full week, a mid-weekly roundtrip in addition to a Sunday flight would be necessary, for a short season.
- Katowice – or Krakow - could be considered a couple of years after Warsaw, by EuroLOT, with the airplane type mentioned above. Wizz Air, a low cost carrier of Hungary and Poland, flies with its fleet of 6 180 seat Airbus A320 airbus to 13 destinations from Katowice. But the ATR-42 of EuroLOT for 46 passengers would be more relevant for flights from Krakow or Katowice, after Warsaw.
- Frankfurt-Hahn in the far west of Germany has got Ryanair as its dominating airline. The smallest aircraft in the Ryanair fleet is the Boeing 737-200 for 130 passengers. Ryanair has got 9 of those, plus 82 Boeing 737-800 for 189 passengers. The smallest of the two types of B737 should be used on flights to Bornholm, if possible, and if any.
- Swiss serves the route Zurich-Copenhagen, and so does its subsidiary Swiss European Air Lines. The smallest planes of Swiss European is the Embraer RJ 145 with 49 seats, which would be appropriate for flights from Zurich to Bornholm. A stopover in CPH on flights from Zurich, and then continue to Bornholm and back would be a possibility, perhaps. Apart from 3 Embraer RJ 145 Swiss European has 4 Avro RJ85 and 20 Avro RJ100.
- Cimber serves the route Basel-Copenhagen, with through tickets to Bornholm. The aircraft used on the route is the CRJ 200LR, a jet plane with 50 seats.
- Among the two Helsinki-based airlines Finnair and Blue1 (a SAS subsidiary), Blue1 has the smallest aircraft: SAAB 2000, with a capacity of 47 passengers.

16. How should the holidays to Bornholm be organised and sold?

The questions are:

- Should airtickets and accommodation be sold separately or together as a package?
- Should the separate products or packages be sold by the airlines, the hotels or tour operators?
- Should the airtickets be available for sale on the CRS/GDS-systems, normally used by the travel agents for booking primarily business travel tickets?
- Or is the Internet so well penetrated and accepted by consumers for making bookings?
- Will travel agents accept making the booking of airtickets on a website totally or largely like those websites used by consumers?
- Are there differences between countries, as to which mix of the above is optimal?
- Are there differences between each airline as to what distribution channels and booking platforms are most appropriate?
- Should a strong tour operator be involved, if possible, for all routes, or is it not necessary in all cases?
- If tour operators should be involved should they be based on the local markets or at the destination?

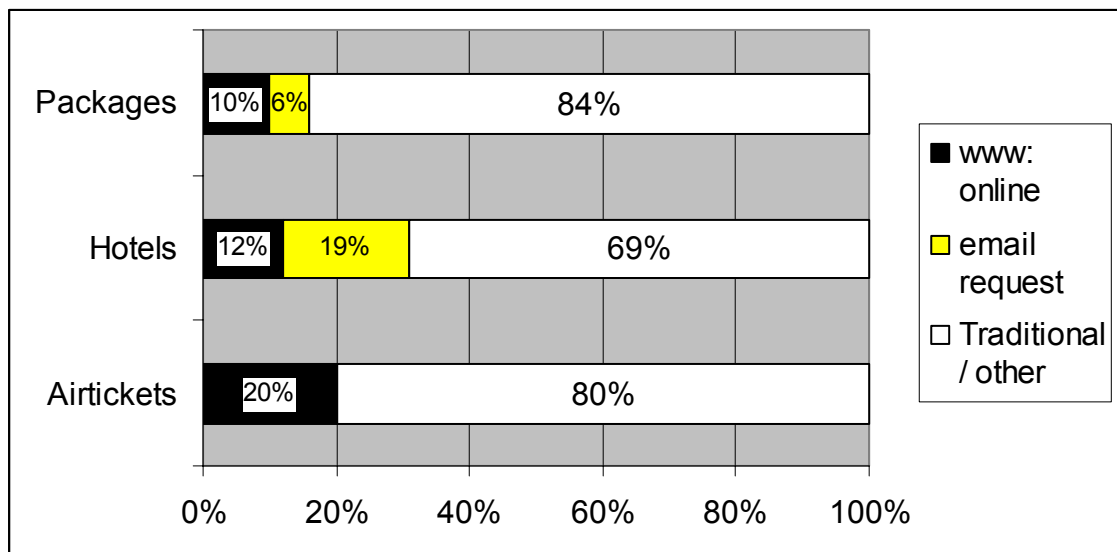
Tentative answers are summarised in Table 27.

Table 27 Distribution of airtickets, hotels and packages for holidays on Bornholm

	Airtickets	Hotels	Packages
Germany	HLX: Only Online LH: Through Amadeus and travel agents. Air Berlin: Both online and through travel agents. Travel agents use agent login on the AB web portal.	The online bookable hotels on Bornholm should be linked in at the HLX website. LH: Could be provided with a number of websites where hotels on Bornholm can be booked. Hotel websites are in German.	HLX has introduced dynamic packaging for some destinations at its website. Could in due course be relevant for Bornholm. Packages to be offered and sold from tour operators on Bornholm.
Sweden	Skyways: Would offer the tickets on its website to consumers.	Some Swedes may be interested in booking hotels online, or by phone.	At least one tour operator, island specialist, would offer packages.
Norway	Wideroe would offer the lowest prices only at its website.	Norwegians can easily understand Danish and book at the online booking websites, by email or by phone directly with the hotels.	Tour operators on Bornholm may be involved in selling packages (golf, fishing, bicycling etc.) to Norwegians.
Other	All airlines to sell online and their other normal channels.	Booking sites for hotels will be in English as well as Danish and German.	Packages will be made available in English language websites by destination based tour operators.

The weight of modern (Internet based) vs. traditional distribution channels (hereunder CRS/GRS, travel agents, airline/airport offices and telephone and fax) is different from product to product (airtickets, hotels, packages) and from country to country. The internet is possibly a little more important in Scandinavia than in Germany and other markets. Even so, the below graph shows how a general picture of the split, by product type.

Figure 65 Internet-based vs. traditional/other distribution channels for airtickets, hotels and packages



For hotels the numbers are actual based on own study in 2005 for hotels on Bornholm, as part of a study of online booking of accommodations service all across Denmark in 2005: "Destination Denmark on the Internet". For airtickets the 20% online corresponds to SAS Denmark in 2005, for whom the rest was 8% telephone and 72% agents. Some airlines may be lower, and a few higher, in particular low cost carriers. For TUI Group in the Nordic Counties (Fritidsresor, Star Tour) a remarkable statement is made in the annual accounts: New distribution channels, including the Internet accounted for more than 50% of sales, but that included sales via the Internet platform by 25 travel agencies exclusively selling tours of the TUI Group. For the TUI Group, "European online sales alone climbed to 1.8 billion euros in 2005" (PR 8 March, 2006), out of a tourism turnover of 14,1 billion EUR, i.e. 13%, but this includes the airlines HLX and Hapagfly, which have got a high percentage of internet sales. So, for package the average is put at 10%, not including agent use of the Internet. Among small tour operators email may play a role in the booking process of consumers (but not within the TUI Group).

Over 20 firms on Bornholm are tour operators and members of the Danish Travel Guarantee Fund. Should one of the main service providers go bankrupt after the tourists have purchased their holiday, their loss will be refunded. They will be offered alternative accommodation if the hotel fails or alternative transport if the airline fails. This is also the case if the package holiday is sold to a customer not living in Denmark, as long as the invoice is issued in Denmark.

Table 28 On Bornholm there are a dozen members of the Danish Travel Guarantee Fund

Name	Website	Danish	German	English	Swedish	Polish	Air pack.s
A/S Team Bornholm	www.teambornholm.dk	1	1	1	0	0	
Lyngholt Camping - Booking og Camping	www.lyngholt.dk	1	1	0	0	0	
Bornholms Sommerhus Udlejning I/S	www.bornholms-sommerhus.dk/	1	1	0	0	0	
Bornholmtours v/Søren Petersen	www.bornholmtours.com	1	1	1	0	0	
Campingferie Bornholm I/S	www.nordskoven.dk	1	1	1	0	0	1
Det Lille Rejsebureau v/K-E Pedersen	www.campingbornholm.dk	1	0	0	0	0	
Dueodde Badehotel I/S	www.dueodde-badehotel.dk/	1	1	1	0	0	1
Feriepartner Bornholm ApS	www.feriepartnerbornholm.dk	1	1	0	0	0	
Hotel Balka Søbad K/S + Abildgård	www.hotel-balkasoebad.dk	1	1	1	0	1	1
Hotel Fredensborg ApS + Griffen	www.bornholmhotels.dk/	1	1	1	0	0	1
Hotel Friheden A/S	www.hotel-friheden.dk	1	1	1	0	0	1
Hotel Pepita v/Benny B. Schou	www.pepita.dk	1	1	1	0	0	
Hotel Romantik	www.allingehotellerne.dk	1	1	0	0	0	
Hotel Ryttergården ApS	www.bornholmbest.net	1	1	1	0	0	
Jan-Ole´s Turisttrafik v/J-O. Pedersen	www.hasleturisttrafik.dk/	1	1	0	1	0	
Meeting Bornholm ApS	www.meetingbornholm.com	1	0	1	1	0	
Mølleparken v/Niels Koefoed	www.moelleparken.dk	1	1	0	0	0	
Møllers Dueodde Camping I/S	www.dueodde-camp.dk	1	1	0	0	0	
Nordbornholms Turistbureau	www.bbc.dk	1	1	0	0	0	
Rømers Rejser / Biking Bornholm / Golfdenmark.dk	www.biking.dk	1	1	0	0	0	1
do. - with air inclusive packages	www.golfdenmark.dk						
Sannes Familiecamping v/Susanne Beyer	www.familiecamping.dk	1	1	1	0	0	
Rutsker Feriecenter ApS - YNF 1892 ApS	www.rutskerferie.dk	1	1	0	0	0	1
Aakirkeby Turist- og Selskabskørsel	www.aakirkeby-turistfart.dk	1	0	0	0	0	
Total		23	20	11	2	1	7

There are a number of online booking sites for hotels and other accommodations on bornholm and even packages (ferry plus hotels), both based or run by people on Bornholm, other places in Denmark, or in Germany, Sweden and other countries. First, some sites where individual room nights can be booked online:

www.bornholm.info, the general tourist information site of the island, has a booking mask at the front page linking to www.visitdenmarkbooking.dk, with 11 hotels online bookable on Bornholm.

www.Bornholm-booking.dk, with 13 hotels online bookable.

www.tui-ferienhaus.de, hereunder hotels, Denmark, Bornholm, with 13 hotels on Bornholm, cf. encl. 5.

In addition to these there are additional sites, where holiday packages can be booked:

www.Bornholmtours.com, cf. above table, has 30 different accommodations in its catalogue, including one camping site with two types of cabins, the rest hotels, pensions, holiday centres. Also it has got holiday cottages in its programme. Full week stays or mini holidays are sold (not individual room night).

Nordbornholms Turistbureau, Bornholms Booking Center, www.BBC.dk, cf. above table, has 32 hotels in its programme, plus another 10 accommodations with unservices apartments only.

www.TeamBornholm.se, Sweden, has 20 hotels online bookable as part of ferry packages.

All hotels on Bornholm have got home pages, perhaps with one or two exceptions, and all except one have got available email addresses. 27 of about 47 are online bookable at a minimum of one website, and at least others three are online bookable as part of packages with one of the tour operators, such as www.TeamBornholm.se, cf. enclosure 9.

17. Conclusion

The catchment area of potential departure airports for summer flights to Bornholm has been defined as about 100 km from the tourist's home town to the airport.

The three criteria which have been applied for evaluating potential departure airports are these:

1. There should preferably be at least 500 couples/families/households from the airport's catchment area requesting information about Bornholm in 2005.
2. There should be at least one million people living within ~100 km from the airport.
3. There *should* be at least 500 km from the tourists home town to the ferry port

Oslo and Stockholm fulfil all three criteria. Hanover, Hamburg, Düsseldorf and Berlin are the most promising departure airports in Germany for Bornholm. Düsseldorf is within the catchment area of Cologne-Bonn. Zurich and Basel are also close. Flights should only be considered for either Düsseldorf or Cologne, and Zurich or Basel, respectively.

Germany

In Germany there is a full dozen of candidate airports: Hanover, Hamburg, Düsseldorf or Cologne-Bonn, one of the Berlin airports, Munich, Stuttgart, Frankfurt/Main, Münster, Hahn and Bremen. Kiel is also a possibility. And so is Dortmund (as an alternative to Düsseldorf).

Hamburg Airport, covering the states Schleswig-Holstein and Hamburg, passes on two of the criteria (interest in Bornholm as indicated by the number of requests) and population basis. The only problem is the rather short distance to the ferry port in Sassnitz (only 327 km). On the other hand, the ferry from Germany takes 3½ hours, plus waiting time.

From the city state of Berlin there are more requests than from the city state of Hamburg. So, there is a high concentration of people within a short distance from one of the airports of Berlin, but the additional potential in the state of Brandenburg (near Berlin) is not so great than the additional potential in Schleswig-Holstein (near Hamburg).

Hanover in the German state of Niedersachsen passes two of the three criteria (requests and population basis), and very nearly the third (distance). It is, however, a little less than 500 km from the main city of Hanover to the ferry port in Sassnitz (474 km).

Of the three main international airports in Nordrhein-Westfalen Düsseldorf, Münster and Cologne-Bonn pass two of the three criteria, the number of requests being the only problem. Cologne-Bonn and Düsseldorf lie within each others catchment areas, but it is perhaps not likely that people will drive past one of these airports in order to fly from the other.

The potential in the northern part of Niedersachsen has been assigned to Bremen airport. Even so, the interest in Bornholm is smaller than around the airports of Hamburg, Berlin and Hanover. Since Bremen is rather close to Bornholm (by air), frequent flights by a relatively small airplane could be considered.

In Southern Germany, the problem is to reach the number of at least 500 information requests. If people would go the 229 km from Stuttgart to Munich or visa versa, there would be enough people interested in going to Bornholm, but the assumption here is that people will not travel more than 100 km to reach the airport, and therefore southern Germany look beyond the reach of the appeal of Bornholm, for the time being. Advertising and/or particularly interesting prices could change the current situation, though.

Sweden

In Sweden Bromma could be an alternative to Arlanda, but even so, Arlanda is recommended. Norrköping Airport, just over 100 km south of Stockholm, ranks in the top ten among the airports, measured by number of information requests, and this does not even include any of the requests from the county of Stockholm. Linköping is an alternative to Norrköping. There is a quite great interest in Bornholm from Göteborg and the surrounding county (total rank as number seven, ahead of Berlin-Brandenburg)! The problem with Göteborg is, though, that it is located only 327 km from Ystad. But for short breaks, enough tourists may want to fly to Bornholm from Göteborg Landvetter.

Norway

Oslo Gardermoen ranks on par with Stockholm Arlanda. Both are ranking highly among other candidate airports. Oslo Torp is not an alternative to Oslo Gardermoen, since the key market areas of Oslo and Akershus are closer to Gardermoen than to Torp. Gardermoen would be a first priority in Norway. However, after a couple of years of flights from Gardermoen to Bornholm, flights from Oslo Torp could be considered, perhaps via Aalborg, in case no airline establishes direct non-stop flights from Aalborg to Bornholm.

Poland

From all parts of Poland there were only about 600 information requests in 2005. If all of these had come from a radius of 100 km from Warsaw or Katowice or Krakow airports the six criteria would be met, including the minimum of 500 information requests within the catchment area of one airport, but that is of course not the case, Poland being such a big country. Furthermore some of the information requests came from a distance of less than 500 km from one of the ferry ports with connection to Rønne or Nexø on Bornholm. So, in Poland those interested in going to Bornholm are too thinly spread over the entire country for an airline route to be feasible.

Other international markets

In all other countries, except Denmark itself, there are not enough people interested in going to Bornholm, for an airline route to be feasible. Thus, from all of Netherlands, there were only 216 information requests, i.e. less than half of the threshold of minimum 500. From each of the next countries, namely Switzerland, USA, Finland, UK, Italy and France there were only some 100 information requests, i.e. far under the minimum of 500, which is not for a whole country, but for each airport. It would be a challenge to establish flights from Switzerland to Bornholm.

Denmark - Jutland

Within Denmark, Aalborg Airport is a candidate for a weekly roundtrip during the summer half of the year, to supplement the new route from Billund, which has got three weekly roundtrips.

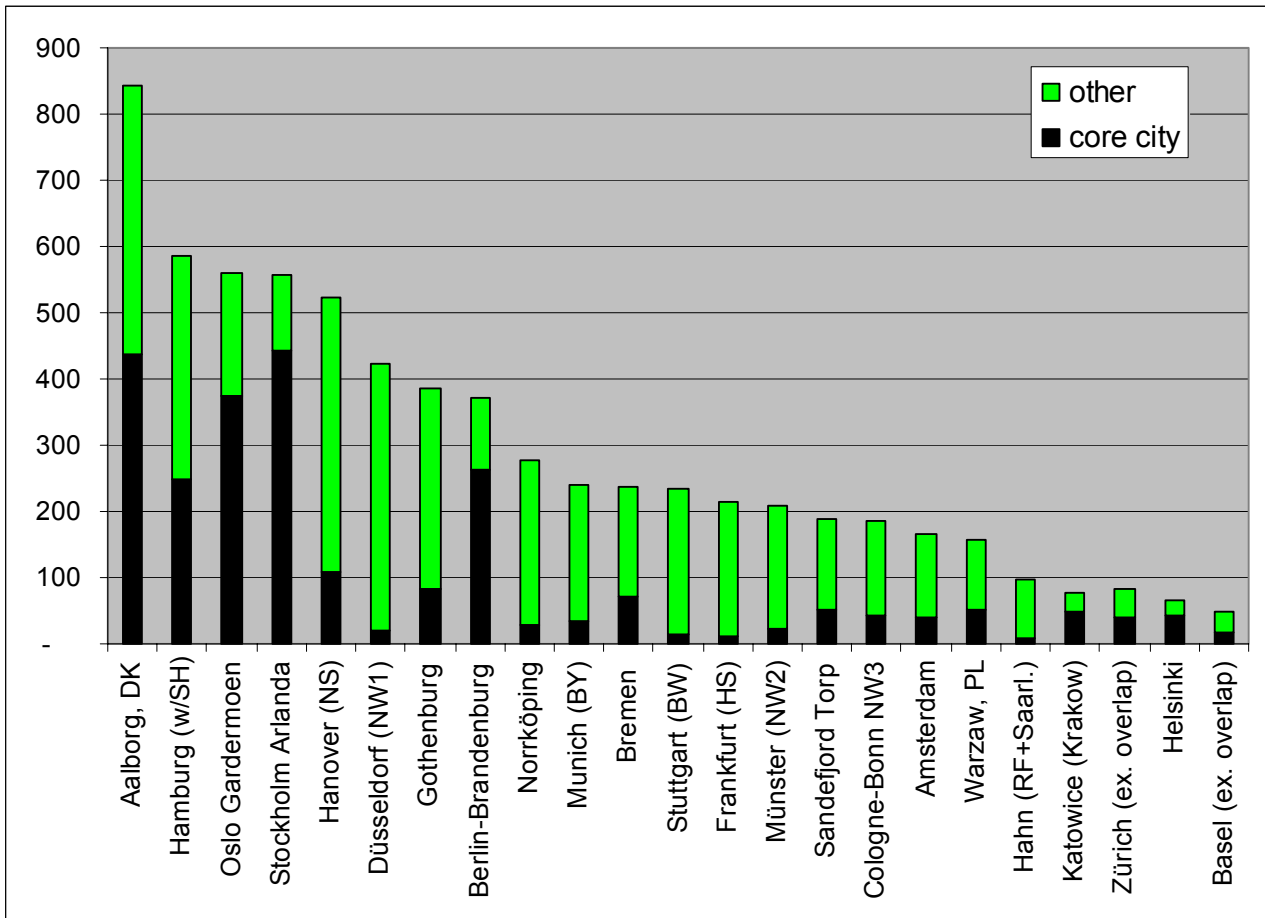
To sum up the international and national review of all candidate departure airports for new summer routes directly to Bornholm the following can be stated:

Table 29 Ranking of potential departure airports by number of information requests

Rank	Airport	Criteria 1: Requests	Criteria 2: Catchment	Criteria 3: Distance
1	Aalborg, DK	842	0,5	502
2	Hamburg (w/SH)	587	5,2	327
3	Oslo Gardermoen	559	1,6	628
4	Stockholm Arlanda	558	2,5	673
5	Hanover (NS)	524	6,7	474
6	Düsseldorf (NW1)	424	11,3	720
7	Göteborg	386	1,5	327
8	Berlin-Brandenburg	372	6,0	309
9	Norrköping	276	1,0	527
10	Munich (BY)	240	12,4	866
11	Bremen	238	1,8	425
12	Stuttgart (BW)	235	10,7	912
13	Frankfurt (HS)	213	6,1	808
14	Münster (NW2)	209	2,2	596
15	Sandefjord Torp	189	0,6	586
16	Cologne-Bonn NW3	186	4,8	742
17	Amsterdam	165	15,7	787
18	Warsaw, PL	158	5,1	527
19	Hahn (RF+Saarl.)	97	5,1	919
20	Katowice (Krakow)	78	8,0	654
21	Zürich (ex. overlap)	83	3,8	1126
22	Helsinki	65	2,1	930
23	Basel (ex. overlap)	50	2,1	930
24	Brussels (100% B)	40	10,4	913
25	Paris	29	9,6	1215
26	London	29	7,4	1186
27	Milan (Lombardia)	28	9,1	1425
28	Vienna (50% of A)	25	4,0	959
Now	Billund (3*week)	3250	1,7	352

Note: Bremen includes digit 26-28. Münster includes Osnabrück.

Figure 66 Number of information requests about Bornholm by airport (city and full catchment area)



Which airlines fly to island destinations in the Baltic Sea, the North Sea or to Denmark (or Sweden) in general from the above departure airports, and which airlines could therefore fly to Bornholm? What type of aircraft is used for similar destinations and is therefore appropriate for flights to Bornholm? During what months, for how many weeks in total (what season) and how many times per week? With no guarantee that any airline will fly at all, in the below table some tentative answers are provided.

Table 30 Who could fly to Bornholm, with what type of airplane, during what season, how many roundtrips, with what total capacity of seats offered from top half of top 20 airports

Airport	Candidates	Airplane	Seats	May	June	July	Aug	Sep	Rounds	Seats rtn	Per request
1 Aalborg, DK	Cimber	CRJ 200LR	50		1	4	4	1	10	500	0,6
2 Hamburg (w/SH)	LH Cityline	CRJ 100	50	0	3	6	8	5	22	1.100	1,9
3 Oslo Gardermoen	Widerøe	Dash-8 400	76		2	4	1		7	532	1,0
4 Stockholm Arlanda	Skyways	SAAB 340	50		3	4	4		11	550	1,0
5 Hanover (NS)	HLX	B737	144	0	0		4	3	7	1.008	1,9
6 Düsseldorf (NW1)	Air Berlin	A320	180	0	0	1	4	3	8	1.440	3,4
7 Gothenburg	City Airline	Embraer 14E	49		2	4	1		7	343	0,9
8 Berlin-Brandenburg	Cimber / LH	CRJ 200LR	50	0	0	2	8	4	14	700	1,9
9 Norrköping	Cimber	CRJ 200LR	50		1	4	1		6	300	1,1
10 Munich (BY)	LH Cityline	CRJ 1/200	50	0	0	2	4	3	9	450	1,9
11 Bremen	OLT	SAAB 340	33	0	0	2	8	4	14	462	1,9
12 Stuttgart (BW)	LH Regional	ATR 42	46	0	0	2	4	3	9	414	1,8
13 Frankfurt (HS)	LH Regional	Dash-8	50	0	0	1	4	3	8	400	1,9
14 Münster (NW2)	Dauair	SAAB 340	33	0	0	0	8	4	12	396	1,9
15 Sandefjord Torp	Widerøe	Dash-8 300	50			0			0	-	-
16 Cologne-Bonn NW3	HLX	B737	144	0	0	1	4	1	6	864	4,6
17 Amsterdam	KLM	Fokker 50	50			1	4	1	6	300	1,8
18 Warzaw, PL	EuroLOT	Fokker 50	50			1	4	1	6	300	1,9
19 Hahn (RF+Saarl.)	Ryanair	B737-200	130				0		0	-	-
20 Katowice (Krakow)	EuroLOT	Fokker 50	50				0		0	-	-
21 Zürich (ex. overlap)	Swiss Euro.	Embraer RJ	49			4	2		6	294	3,5
22 Helsinki	Blue1	SAAB 2000	47			0			0	-	-
23 Basel (ex. overlap)	Cimber	CRJ 200LR	50			3	1		4	200	4,0
All new potential seasonal routes				0	12	46	78	36	172	10.553	
Düsseldorf OR Cologne	HLX or AB	B737/A320	162	0	0	1	4	2	7	1.134	1,9
Zürich OR Basel	LX or Cimber	RJ OR CRJ	50		0	4	1		5	250	1,9
Now Billund (3*week)	Cimber	CRJ 200LR	50	3	13	14	6	0	36	1.800	0,6

Note: Guideline for capacity modelling: Max. 1 seats per request in Scandinavia, max 2 seats per requests elsewhere. Preferably at least 6 rounds.

18. References

Bornholm Airport, Civil Aviation Administration, www.bornholms-lufthavn.dk/en/
Contact: Peter Hviid, Director, pehv@slv.dk

Destination Bornholm ApS, www.bornholm.info
Contact: Mikkel Jensen, Development Manager, mikkel@bornholm.info

Destination Bornholm ApS, list of post codes for 21.000+ information requests by country (2005).

Hartl, Ann (2003): *Survey of Visitors to Bornholm. January - December 2002*, Centre for Regional and Tourism Research.

Marcussen, Carl Henrik (2005): *Destination Danmark på nettet - Online booking af danske feriehuse, hoteller og andre overnatningstjenester 2004-2005*, Centre for Regional and Tourism Research.

Statistics Denmark: Bednight statistics, holiday cottage letting statistics, ferry statistics, national and international population statistics.

Aviation statistics: Passengers by country and by airport, air airlines.

Airline websites, tour operator (on the island and abroad), travel agent websites, online hotel booking sites, and hotel websites (on Bornholm)

Telephone interviews and email correspondence with airlines and some tour operators.

Personal interviews and discussions at ITB 2005 in Berlin with VisitDenmark in Germany, airlines and tour operators.

Personal interviews and discussions with airports and a few airlines at the World Regional and Low Cost Airports Congress 2006, 3-6 April 2006, Radissons SAS Hotel, Berlin.

19. Enclosures

Encl. 1. About the 8 most important segments

	Danes - hotels	Danes - centers	Danes - cottages	Danes - camping	Germans - cottages	Germans - hotels	Swedes - hotels	Norwegians - hotels	Top 8 segments	All paying	All non paying
% of bed revenue 2005	26%	10%	11%	5%	17%	11%	5%	3%	88%	100%	
No. in the party	2,2	2,8	3,1	3,4	3,1	2,9	3,0	2,5		2,9	2,3
Days on Bornholm	4,2	5,8	9,8	10,9	12,4	8,0	4,0	6,0		7,4	6,2
Typical age group	50-59	35-49	35-49	35-49	35-49	60-69	50-59	35-49		35-49	35-49
	55	49	50	46	48	57	55	50		50	46
Share of all respondents, who visited or did the following during this holiday:											
Hammershus Castle	39%	53%	51%	48%	57%	69%	50%	44%		48%	16%
Hammershus Exhibition	13%	24%	19%	17%	12%	18%	8%	28%		15%	3%
Østerlars Round Church	31%	44%	43%	35%	37%	58%	37%	30%		35%	8%
Joboland	3%	8%	14%	19%	7%	2%	2%	16%		9%	5%
Natur Bornholm	17%	27%	25%	24%	30%	43%	18%	35%		25%	6%
Medieval centre	4%	8%	7%	11%	16%	14%	7%	2%		9%	3%
Christiansø	17%	18%	15%	14%	14%	17%	6%	21%		14%	2%
Bornholm Art Museum	13%	6%	11%	7%	14%	15%	16%	7%		12%	5%
Oluf Høst Museum	17%	16%	15%	14%	3%	10%	2%	2%		10%	4%
Bicycle ride	5%	18%	12%	20%	32%	26%	16%	35%		18%	7%
Guided coach tour	16%	2%	1%	2%	2%	25%	17%	16%		8%	1%
Golf	3%	0%	6%	1%	1%	2%	8%	5%		3%	2%
Eating out	48%	58%	48%	58%	41%	39%	76%	70%		50%	24%
Shopping	40%	60%	62%	68%	56%	48%	70%	67%		55%	40%
Importance of various aspects of the choice of Bornholm as a holiday destination, 1=very important, 4 =not at all important:											
Beaches	2,6	2,7	2,4	2,3	1,7	2,2	2,5	2,0		2,3	2,3
Landscape	1,5	1,3	1,4	1,4	1,3	1,3	1,6	1,7		1,5	1,7
Cyclepaths	3,1	2,8	3,0	2,8	2,3	2,2	2,8	2,0		2,7	2,8
Walk	2,5	2,2	2,2	2,3	2,1	2,0	3,0	2,7		2,4	2,5
Fishtowns	1,8	1,7	1,7	1,9	1,8	1,7	1,9	2,4		1,8	2,2
Nature	1,5	1,3	1,3	1,3	1,3	1,2	1,5	1,7		1,4	1,6
Golf	3,7	3,8	3,7	3,9	3,8	3,8	3,6	3,7		3,8	3,7
Fishing	3,6	3,7	3,4	3,5	3,3	3,7	3,7	3,6		3,6	3,5
Cultural history	2,1	2,0	2,0	2,3	2,2	2,0	2,0	2,2		2,1	2,4
Restaurants	2,4	2,6	2,7	2,8	2,9	2,3	1,9	2,2		2,6	2,8
Craft, art workers	2,6	2,7	2,6	2,7	2,3	2,2	2,3	2,4		2,5	2,8
Apmosphere	1,6	1,6	1,5	1,6	1,4	1,3	1,4	1,5		1,5	1,8
A variety of activities	2,9	2,5	2,7	2,5	2,3	2,3	2,7	2,5		2,6	3,0
Family/friends on Bornho	3,1	3,5	3,1	3,2	3,4	3,7	3,8	3,6		3,3	1,4
General impression of Bornholm, 1=excellent, 5 =bad:											
as holiday destination	1,3	1,2	1,3	1,3	1,3	1,4	1,2	1,5		1,3	1,3
value for money	1,8	1,6	1,8	1,8	2,8	2,8	2,1	2,0		2,1	1,9
Number of respondents	286	62	199	108	207	84	103	43	1.092	1.472	764
Share of 1472 respond.	19%	4%	14%	7%	14%	6%	7%	3%	71%	100%	

Encl. 2. Holiday cottage statistics – for Bornholm and for DK overall

Statistics for holiday cottage letting on Bornholm, 1998-2005

Contracts	Kontrakter	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	2.891	3.874	4.086	4.232	4.290	4.778	5.599	5.895	5%
Germany	Tyskland	9.194	8.587	8.857	8.639	8.229	7.933	8.271	7.499	-9%
Sweden	Sverige	413	483	445	487	472	454	441	428	-3%
Norway	Norge	408	500	643	469	536	553	568	463	-18%
Others	Øvrige	500	610	804	628	706	691	735	634	-14%
Total	I alt	12.998	13.554	14.192	13.986	13.697	13.856	15.046	14.456	-4%

house weeks	husuger	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	3.421	4.543	4.466	4.638	4.629	5.077	5.812	6.026	4%
Germany	Tyskland	16.643	14.803	15.415	14.866	13.947	13.607	12.887	12.101	-6%
Sweden	Sverige	448	498	443	500	499	482	452	443	-2%
Norway	Norge	503	553	701	553	637	648	639	513	-20%
Others	Øvrige	640	688	907	759	876	839	866	766	-12%
Total	I alt	21.152	20.532	21.231	20.763	19.951	20.005	20.017	19.336	-3%

bednights (1000)	overnatninger (1000)	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	108	142	141	159	154	166	187	191	2%
Germany	Tyskland	509	449	451	436	409	396	364	333	-9%
Sweden	Sverige	16	18	16	18	17	17	16	15	-6%
Norway	Norge	18	18	25	21	25	24	24	19	-21%
Others	Øvrige	21	21	31	27	32	29	30	26	-13%
Total	I alt	654	630	639	640	612	608	597	565	-5%

Ave. weeks	Ophold, uger	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	1,2	1,2	1,1	1,1	1,1	1,1	1,0	1,0	-2%
Germany	Tyskland	1,8	1,7	1,7	1,7	1,7	1,7	1,6	1,6	4%
Sweden	Sverige	1,1	1,0	1,0	1,0	1,1	1,1	1,0	1,0	1%
Norway	Norge	1,2	1,1	1,1	1,2	1,2	1,2	1,1	1,1	-1%
Others	Øvrige	1,3	1,1	1,1	1,2	1,2	1,2	1,2	1,2	3%
Total	I alt	1,6	1,5	1,5	1,5	1,5	1,4	1,3	1,3	1%

Nights p.p.	Nætter p.p.	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	8,3	8,2	7,7	7,7	7,6	7,4	7,3	7,2	-2%
Germany	Tyskland	12,7	12,1	12,2	12,0	11,9	12,0	10,9	11,3	4%
Sweden	Sverige	7,6	7,2	7,0	7,2	7,4	7,4	7,2	7,2	1%
Norway	Norge	8,6	7,7	7,6	8,3	8,3	8,2	7,9	7,8	-1%
Others	Øvrige	9,0	7,9	7,9	8,5	8,7	8,5	8,2	8,5	3%
Total	I alt	11,4	10,6	10,5	10,4	10,2	10,1	9,3	9,4	1%

Persons (1000)	Personer (1000)	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	13,0	17,3	18,4	20,7	20,4	22,3	25,7	26,7	4%
Germany	Tyskland	40,2	37,2	37,0	36,2	34,5	33,0	33,4	29,5	-12%
Sweden	Sverige	2,1	2,5	2,3	2,5	2,3	2,3	2,2	2,1	-7%
Norway	Norge	2,1	2,3	3,3	2,5	3,0	2,9	3,0	2,4	-20%
Others	Øvrige	2,3	2,7	3,9	3,2	3,7	3,4	3,6	3,1	-15%
Total	I alt	57,4	59,4	61,0	61,6	60,0	60,2	64,1	60,3	-6%

Party size	Personer/hus	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	4,5	4,5	4,5	4,9	4,8	4,7	4,6	4,5	-1%
Germany	Tyskland	4,4	4,3	4,2	4,2	4,2	4,2	4,0	3,9	-3%
Sweden	Sverige	5,1	5,2	5,2	5,1	4,9	5,0	5,1	4,8	-4%
Norway	Norge	5,1	4,6	5,1	5,4	5,6	5,3	5,4	5,3	-1%
Others	Øvrige	4,7	4,4	4,9	5,1	5,2	4,9	4,9	4,8	-2%
Total	I alt	4,4	4,4	4,3	4,4	4,4	4,3	4,3	4,2	-2%

The above table shows that there was a drop of 5% in the number of bednights in holiday cottages on Bornholm in 2005. All foreign markets dropped: Germany -9%, Sweden -6%, Norway -21%, other international markets -5%, whereas the Danish market increased 2%.

Statistics for holiday cottage letting in Denmark, 2000-2005

Contracts	Kontrakter	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	48.381	53.613	53.782	56.985	62.934	70.380	78.440	85.146	9%
Germany	Tyskland	263.872	246.282	250.829	248.264	260.669	259.237	248.865	249.511	0%
Sweden	Sverige	6.405	8.336	9.762	8.797	8.770	8.657	9.894	9.016	-9%
Norway	Norge	14.907	14.907	16.150	13.321	15.109	16.610	20.391	14.520	-29%
Others	Øvrige	24.611	23.838	26.073	23.057	25.656	28.955	33.648	27.672	-18%
Total	I alt	343.269	332.069	340.446	337.103	358.029	367.229	370.847	371.345	0%

house weeks	husuger	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	54.480	59.656	59.987	62.610	66.822	73.892	80.844	87.966	9%
Germany	Tyskland	407.571	372.060	375.614	360.274	376.987	380.916	363.696	343.127	-6%
Sweden	Sverige	6.925	8.321	9.355	8.988	8.865	9.036	9.936	9.463	-5%
Norway	Norge	17.233	16.531	17.228	15.250	17.310	19.057	19.644	16.590	-16%
Others	Øvrige	30.575	28.520	30.380	28.131	31.029	34.826	36.263	33.409	-8%
Total	I alt	499.551	468.557	475.336	460.003	483.703	498.670	490.739	473.965	-3%

bednights (1000)	overnatninger (1000)	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	1.756	1.927	1.883	2.082	2.208	2.414	2.621	2.826	8%
Germany	Tyskland	13.459	12.017	11.734	11.277	11.534	11.622	10.587	10.014	-5%
Sweden	Sverige	266	322	356	345	334	332	356	343	-4%
Norway	Norge	684	637	668	601	692	732	735	626	-15%
Others	Øvrige	1.112	1.024	1.061	995	1.102	1.200	1.225	1.136	-7%
Total	I alt	16.593	15.290	15.034	14.699	15.178	15.568	14.789	14.319	-3%

Ave. weeks	Ophold, uger	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	1,1	1,1	1,1	1,1	1,1	1,0	1,0	1,0	0%
Germany	Tyskland	1,5	1,5	1,5	1,5	1,4	1,5	1,5	1,4	-6%
Sweden	Sverige	1,1	1,0	1,0	1,0	1,0	1,0	1,0	1,0	5%
Norway	Norge	1,2	1,1	1,1	1,1	1,1	1,1	1,0	1,1	19%
Others	Øvrige	1,2	1,2	1,2	1,2	1,2	1,2	1,1	1,2	12%
Total	I alt	1,5	1,4	1,4	1,4	1,4	1,4	1,3	1,3	-4%

Nights p.p.	Nætter p.p.	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	7,9	7,8	7,8	7,7	7,4	7,3	7,2	7,2	0%
Germany	Tyskland	10,8	10,6	10,5	10,2	10,1	10,3	10,2	9,6	-6%
Sweden	Sverige	7,6	7,0	6,7	7,2	7,1	7,3	7,0	7,3	5%
Norway	Norge	8,1	7,8	7,5	8,0	8,0	8,0	6,7	8,0	19%
Others	Øvrige	8,7	8,4	8,2	8,5	8,5	8,4	7,5	8,5	12%
Total	I alt	10,2	9,9	9,8	9,6	9,5	9,5	9,3	8,9	-4%

Persons (1000)	Personer (1000)	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	223	247	241	271	297	328	363	391	8%
Germany	Tyskland	1.245	1.136	1.119	1.110	1.139	1.130	1.035	1.040	1%
Sweden	Sverige	35	46	53	48	47	45	51	47	-8%
Norway	Norge	85	82	89	75	86	91	109	78	-28%
Others	Øvrige	128	122	130	117	130	143	162	134	-17%
Total	I alt	1.629	1.548	1.538	1.539	1.605	1.638	1.597	1.603	0%

Party size	Personer/hus	1998	1999	2000	2001	2002	2003	2004	2005	04-05 %
Denmark	Danmark	4,6	4,6	4,5	4,8	4,7	4,7	4,6	4,6	-1%
Germany	Tyskland	4,7	4,6	4,5	4,5	4,4	4,4	4,2	4,2	0%
Sweden	Sverige	5,5	5,5	5,4	5,5	5,4	5,2	5,1	5,2	1%
Norway	Norge	5,7	5,5	5,5	5,6	5,7	5,5	5,3	5,4	1%
Others	Øvrige	5,2	5,1	5,0	5,1	5,1	4,9	4,8	4,9	1%
Total	I alt	4,7	4,7	4,5	4,6	4,5	4,5	4,3	4,3	0%

Encl. 3. People interested in visiting Bornholm by city in Germany

People interested in visiting Bornholm (2005) – by state and city in Germany

	Frequency	Percent	Cumulative Percent
01: Kiel	25	,7	,7
01: Lübeck	23	,6	1,3
01: Other	291	7,8	9,0
02: Hamburg	248	6,6	15,7
03: Bremen	71	1,9	17,6
03: Bremerhaven	5	,1	17,7
04: Other	111	3,0	20,6
04: Rostock	23	,6	21,3
05: Berlin	262	7,0	28,2
06: Cottbus	1	,0	28,3
06: Other	85	2,3	30,5
06: Potsdam	14	,4	30,9
07: Braunschweig	27	,7	31,6
07: Göttingen	23	,6	32,2
07: Hanover	108	2,9	35,1
07: Oldenburg	21	,6	35,7
07: Osnabrück	12	,3	36,0
07: Other	500	13,3	49,3
07: Salzgitter	3	,1	49,4
07: Wolfsburg	4	,1	49,5
08: Halle	22	,6	50,1
08: Magdeburg	17	,5	50,6
08: Other	21	,6	51,1
09: Bergisch Gladbach	4	,1	51,2
09: Bielefeld	38	1,0	52,3
09: Bochum	19	,5	52,8
09: Bonn	12	,3	53,1
09: Bottrop	6	,2	53,2
09: Dortmund	27	,7	54,0
09: Duisburg	16	,4	54,4
09: Düsseldorf	19	,5	54,9
09: Essen	24	,6	55,5
09: Gelsenkirchen	5	,1	55,7
09: Hagen	11	,3	56,0
09: Hamm	13	,3	56,3
09: Herne	4	,1	56,4
09: Krefeld	5	,1	56,5
09: Cologne	32	,9	57,4
09: Leverkusen	8	,2	57,6
09: Moers	6	,2	57,8
09: Mülheim/Ruhr	4	,1	57,9
09: Münster	24	,6	58,5
09: Mönchengladbach	5	,1	58,7

09: Neuss	5	,1	58,8
09: Oberhausen	5	,1	58,9
09: Other	451	12,0	71,0
09: Paderborn	12	,3	71,3
09: Recklinghausen	2	,1	71,3
09: Remscheid	8	,2	71,5
09: Siegen	7	,2	71,7
09: Solingen	8	,2	71,9
09: Witten	6	,2	72,1
09: Wuppertal	18	,5	72,6
09: Aachen	3	,1	72,7
10: Darmstadt	3	,1	72,7
10: Frankfurt/Main	12	,3	73,1
10: Kassel	13	,3	73,4
10: Offenbach	1	,0	73,4
10: Other	172	4,6	78,0
10: Wiesbaden	12	,3	78,3
11: Erfurt	3	,1	78,4
11: Gera	1	,0	78,4
11: Other	50	1,3	79,8
12: Chemnitz	10	,3	80,0
12: Dresden	30	,8	80,8
12: Leipzig	25	,7	81,5
12: Other	121	3,2	84,7
13: Koblenz	1	,0	84,8
13: Ludwigshafen	6	,2	84,9
13: Mainz	8	,2	85,1
13: Mannheim	3	,1	85,2
13: Other	69	1,8	87,1
14: Other	6	,2	87,2
14: Saarbrücken	4	,1	87,3
15: Augsburg	4	,1	87,4
15: Fürth	5	,1	87,6
15: Ingolstadt	3	,1	87,7
15: München	34	,9	88,6
15: Nürnberg	13	,3	88,9
15: Other	171	4,6	93,5
15: Regensburg	4	,1	93,6
16: Freiburg im Breisgau	13	,3	93,9
16: Heidelberg	8	,2	94,1
16: Heilbronn	2	,1	94,2
16: Karlsruhe	9	,2	94,4
16: Other	187	5,0	99,4
16: Pforzheim	1	,0	99,4
16: Reutlingen	4	,1	99,5
16: Stuttgart	15	,4	99,9
16: Ulm	2	,1	100,0
Total	3749	100,0	

People interested in visiting Bornholm (2005) – ranked by cities in Germany

	Frequency	Percent	Cum. %
05: Berlin	262	7	7
02: Hamburg	248	6,6	13,6
07: Hanover	108	2,9	16,5
03: Bremen	71	1,9	18,4
09: Bielefeld	38	1	19,4
15: München	34	0,9	20,3
09: Cologne	32	0,9	21,2
12: Dresden	30	0,8	22
07: Braunschweig	27	0,7	22,7
09: Dortmund	27	0,7	23,4
01: Kiel	25	0,7	24,1
12: Leipzig	25	0,7	24,8
09: Essen	24	0,6	25,4
09: Münster	24	0,6	26
01: Lübeck	23	0,6	26,6
04: Rostock	23	0,6	27,2
07: Göttingen	23	0,6	27,8
08: Halle	22	0,6	28,4
07: Oldenburg	21	0,6	29
09: Bochum	19	0,5	29,5
09: Düsseldorf	19	0,5	30
09: Wuppertal	18	0,5	30,5
08: Magdeburg	17	0,5	31
09: Duisburg	16	0,4	31,4
16: Stuttgart	15	0,4	31,8
06: Potsdam	14	0,4	32,2
09: Hamm	13	0,3	32,5
10: Kassel	13	0,3	32,8
15: Nürnberg	13	0,3	33,1
16: Freiburg im Breisgau	13	0,3	33,4
07: Osnabrück	12	0,3	33,7
09: Bonn	12	0,3	34
09: Paderborn	12	0,3	34,3
10: Frankfurt/Main	12	0,3	34,6
10: Wiesbaden	12	0,3	34,9
09: Hagen	11	0,3	35,2
12: Chemnitz	10	0,3	35,5
16: Karlsruhe	9	0,2	35,7
09: Leverkusen	8	0,2	35,9
09: Remscheid	8	0,2	36,1
09: Solingen	8	0,2	36,3
13: Mainz	8	0,2	36,5
16: Heidelberg	8	0,2	36,7
09: Siegen	7	0,2	36,9
09: Bottrop	6	0,2	37,1
09: Moers	6	0,2	37,3
09: Witten	6	0,2	37,5
13: Ludwigshafen	6	0,2	37,7

03: Bremerhaven	5	0,1	37,8
09: Gelsenkirchen	5	0,1	37,9
09: Krefeld	5	0,1	38
09: Mönchengladbach	5	0,1	38,1
09: Neuss	5	0,1	38,2
09: Oberhausen	5	0,1	38,3
15: Fürth	5	0,1	38,4
07: Wolfsburg	4	0,1	38,5
09: Bergisch Gladbach	4	0,1	38,6
09: Herne	4	0,1	38,7
09: Mülheim/Ruhr	4	0,1	38,8
14: Saarbrücken	4	0,1	38,9
15: Augsburg	4	0,1	39
15: Regensburg	4	0,1	39,1
16: Reutlingen	4	0,1	39,2
07: Salzgitter	3	0,1	39,3
09: Aachen	3	0,1	39,4
10: Darmstadt	3	0,1	39,5
11: Erfurt	3	0,1	39,6
13: Mannheim	3	0,1	39,7
15: Ingolstadt	3	0,1	39,8
09: Recklinghausen	2	0,1	39,9
16: Heilbronn	2	0,1	40
16: Ulm	2	0,1	40,1
06: Cottbus	1	0	40,1
10: Offenbach	1	0	40,1
11: Gera	1	0	40,1
13: Koblenz	1	0	40,1
16: Pforzheim	1	0	40,1
Cities w/100.000+	1514	40,1	
07: Other	500	13,3	
09: Other	451	12	
01: Other	291	7,8	
16: Other	187	5	
10: Other	172	4,6	
15: Other	171	4,6	
12: Other	121	3,2	
04: Other	111	3	
06: Other	85	2,3	
13: Other	69	1,8	
11: Other	50	1,3	
08: Other	21	0,6	
14: Other	6	0,2	
Other	2235	59,7	
Total	3749	100	

Encl. 4. Splitting Nordrhein-Westfalen into 3 catchment areas, by airport

Cities in NW	Population	Requests	km			Requests	Requests	Requests
			Düsseldorf	Köln	Münster	Düsseldorf	Köln	Münster
09: Recklinghausen	124.800	2	62	103	85	2		2
09: Dortmund	588.300	27	67	100	92	27	27	27
09: Bochum	387.600	19	47	92	98	19	19	19
09: Hagen	205.500	11	75	82	102	11	11	
09: Bottrop	122.000	6	45	89	104	6	6	
09: Duisburg	517.700	16	32	77	124	16	16	
09: Düsseldorf	568.300	19	9	56	150	19	19	
09: Essen	589.900	24	32	77	107	24	24	
09: Gelsenkirchen	278.100	5	42	87	100	5	5	5
09: Krefeld	238.200	5	21	84	150	5	5	
09: Moers	106.000	6	31	88	135	6	6	
09: Mülheim/Ruhr	174.000	4	25	70	123	4	4	
09: Mönchengladbach	266.400	5	40	83	179	5	5	
09: Neuss	150.000	5	15	58	160	5	5	
09: Oberhausen	221.900	5	33	77	115	5	5	
09: Witten	103.800	6	61	87	108	6	6	
09: Wuppertal	368.600	18	52	65	124	18	18	
09: Herne	175.200	4	51	93	93	4	4	4
Cities near Düsseldorf	5.186.300	187						
09: Other near do.	6.151.621	237						
Düsseldorf Airport	11.337.921	424						
09: Solingen	163.900	8	45	42	144	8	8	
09: Remscheid	117.100	8	57	50	133	8	8	
09: Bergisch Gladbach	106.300	4	65	24	156	4	4	
09: Bonn	311.800	12	90	27	198	12	12	
09: Köln	966.800	32	64	19	192	32	32	
09: Leverkusen	162.500	8	48	28	161	8	8	
09: Siegen	110.000	7	141	97	177		7	
09: Aachen	240.300	3	88	84	232	3	3	
Cities near Köln-Bonn	2.178.700	82						
09: Other near do.	2.584.219	104						
Köln-Bonn Airport	4.762.919	186						
09: Münster	265.500	24	123	156	27			24
09: Hamm	178.000	13	111	129	67			13
09: Bielefeld	322.000	38	184	202	86			38
09: Paderborn	137.700	12	183	195	108			12
Cities near Münster	903.200	87						
09: Other near do.	1.071.312	110						
Münster Airport	1.974.512	197						
Nordrhein-Westfalen	18.075.352	807				594	605	326
09: Big cities	8.268.200	356				262	267	144
09: Other	9.807.152	451						
Big cities %	46%	44%				44%	44%	44%

Encl. 5. HLX and Wolters Reisen within the TUI Group

Within the TUI Group, Wolters Reisen has already got the following 13 hotels on Bornholm in their programme “Erlebnis Nordland” with prices, and availability data. So, 13 hotels on Bornholm can already be booked online in real-time on the website www.tui-ferienhaus.de, under the section hotels. Wolters Reisen rule out the possibility that they would charter flights to Bornholm.

Table 31 13 hotels on Bornholm, online bookable at www.tui-ferienhaus.de

Hotel	TUI stars	Daily rates, double rooms	Weekly rates, apartments
Hotel Skovly	2,5	X	
Byskrivergården Hotel Garni	2,5	X	
Pension Slægtsgården	2,5	X	
Hotel Romantik	3,5	X	X
Hotel Hammersø	3,5	X	X
Hotel-Pension Langebjerg	2,5	X	
Pension Kock	3	X	X
Hotelpension Snogebæk	2,5	X	
Hotel Klintely	2,5	X	X
Hotel Friheden	3	X	
Hotel Balka Søbad	2,5	X	X
Hotel Balka Strand	4	X	
Dueodde Badehotel	4		X

Source: www.tui-ferienhaus.de/hotels_daenemark.html, hereunder: Bornholm.

**Table 32 Cheapest weekly rate for hotels on Bornholm
www.tui-ferienhaus.de/hotels_daenemark.html: Hotel Hammersø (3,5 TUI stars)**

Price in Euro per week without breakfast	Appartment per person	per person per week	Month
01.05.-27.05.06	271	135,50	May
28.05.-24.06.06	336	168,00	June
25.06.-05.08.06	438	219,00	July
06.08.-26.08.06	328	164,00	August
27.08.-01.10.06	271	135,50	September

Return flight from Germany to Bornholm may very well become available for EUR 200 return including taxes and fees, and an apartment for minimum EUR 219 per person in the high season based on two persons sharing, and a taxi is EUR 51 (per way, two persons sharing).²¹ This gives a total price of EUR 200 + 219 + 51 = EUR 470 per person for a week in the high season, July, as a minimum, based on two persons sharing and apartment, without breakfast.²² In the shoulder seasons in May and September, the minimum would be EUR 200 for the return flight, EUR 136 per person for the apartment, EUR 51 for the taxi, i.e. EUR 387 in total per person, minimum.²³

So, lets go and check the TUI website and see what a week to Alcudia on Majorca would cost as a minimum, in May, June, July and September, departure from any airport in Nordrhein-Westfalen (NW), accommodation in any three star hotel, no requirements about meals. The result is the following: In May, June and September the lowest package price from NW (typically Düsseldorf) was EUR 354 per person, for flight with on board meals, transfers and accommodation (no meals), and in July and August the lowest package price was EUR 499 per person.

²¹ Prices as low as EUR 99 return Hamburg-Bornholm have been mentioned in the Danish press. Plus booking fee of EUR 18, presumably.

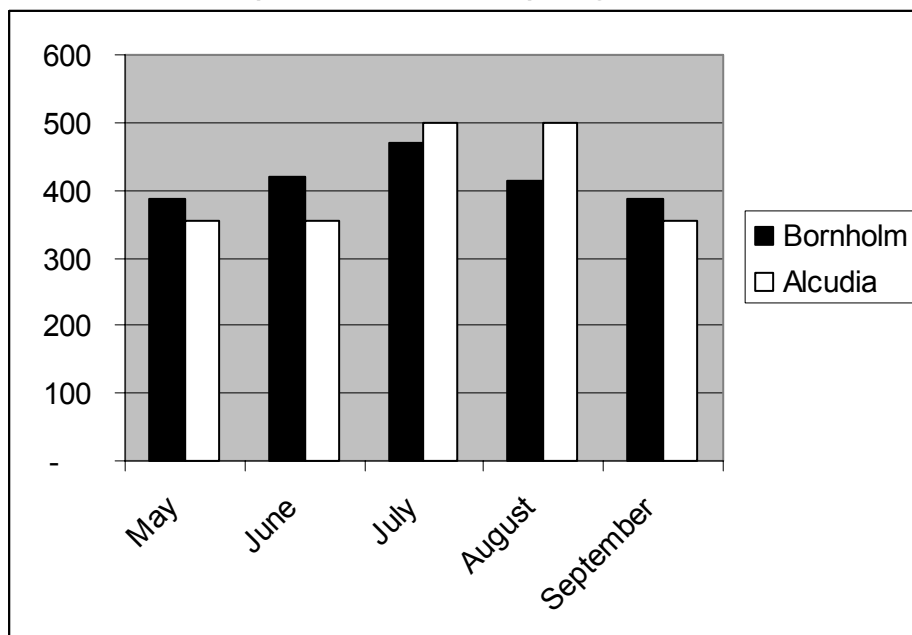
²² Half board would be EUR 19 per person per day, i.e. EUR 133 per person per week, i.e. EUR 603 in the high season, minimum.

²³ Plus EUR 133 for half board.

Assuming a return flight price from NW to Bornholm of EUR 200, and given taxi and accommodation price as previously mentioned, the following result is found:

Bornholm beats Majorca (specifically: *Allinge beats Alcudia*) on price in July and August, but not in May, June and September. It is possible, though, that given airlines would fly for under EUR 200 per person in some of the months.

Figure 67 Bornholm vs. Majorca (Alcudia): Minimum prices in EUR per person for ticket+transfer+3 star hotel on Bornholm vs. minimum prices at www.TUI.de of packages with 3 star hotel from NW



It seems that Bornholm is by no means totally lost in a tentatively direct price comparison with Majorca for the same standard hotels, with flights from the middle of Germany. In average over the whole season from May to and including September, it's EUR 415 for Bornholm (for a specific 3,5 TUI stars hotel, assuming a 200 EUR return flight, and transfer by taxi) vs. EUR 412 in average for Alcudia on Majorca, for packages by 1-2-Fly (the low cost TUI brand).

It is, perhaps, rather unlikely that tourists happen to know or are able to guess that in order to book these hotels on Bornholm, they have to type www.tui-ferienhaus.de (www.wolters-reisen.de) after which they should click on hotels and select Denmark, and under Denmark select Bornholm. The hotel booking portal of TUI, www.tui-hotels.com, does not contain any of the above 13 hotels, but it does include one hotel on Bornholm, namely the Radisson SAS Fredensborg Hotel Bornholm. If one searches on "Bornholm" at www.tui-hotels.com one gets a list of 8 hotels from different parts of Denmark, and by the end of this list the only hotel at www.tui-hotels.com actually located on Bornholm is listed, i.e. the Fredensborg. So, booking hotels on Bornholm at www.tui-ferienhaus.de or www.tui-hotels.com is not straightforward. A better solution would be flights from HLX.com, and at the same site, at separate products, not as packages, hotels can be booked. For example, if choosing the destination Sylt at the HLX.com site, one gets a list of 29 hotels and other accommodations. So, to book the flight and the accommodation separately would work just fine.

A very good price is found at www.bornholm-booking.dk, a site to which there is a link from the hotels own home page. You can get not only the breakfast but also the dinner for free if you book at the hotel's site. That is the same price as without breakfast and dinner at the site mentioned before.

Encl. 6. re. Sweden

The current visitors to Bornholm from Sweden (2005) are distributed by the first digit in the zip code as follows:

Table 33 Information requests sent to Destination Bornholm – from Sweden – by 1st digit post codes

1st digit	including	Frequency	Percent
1	Stockholm	435	17%
2	Malmö, Lund	673	26%
3	Halmstad, Kalmar	295	11%
4	Gothenburg, Varberg	342	13%
5	Jön- / Linköping	327	13%
6	Norrköping, Nyköp.	196	8%
7	Örebro, Uppsala	223	9%
8	Sundsvall, Gävle	70	3%
9	Umeå, Luleå	32	1%
Sweden total		2593	100%

Table 34 Top 15 municipalities in Sweden

Rank	Municipality	Population
1	Stockholm	765.044
2	Gothenburg	481.410
3	Malmö	269.142
4	Uppsala	182.076
5	Linköping	136.912
6	Västerås	131.014
7	Örebro	126.982
8	Norrköping	124.410
9	Helsingborg	121.179
10	Jönköping	119.927
11	Umeå	110.705
12	Lund	101.423
13	Borås	98.886
14	Sundsvall	93.707
15	Gävle	92.081

Source: <http://encyclopedia.quickseek.com/index.php/Sweden#Counties>

Encl. 7. Splitting Switzerland into three catchment areas

Canton	Capital	Population	Info requests	km to Zürich	km to Basel	km Geneve	Friedrichshafen	Zürich, requests	Basel, requests	Geneve, requests
Zürich (Zurich)	Zürich	1.228.600	39	-	86	279	137	39	39	
Zug	Zug	100.900	1	39	120	289	191	1		
Thurgau	Frauenfeld	228.200	2	45	124	317	102	2		
Aargau (Argovia)	Aarau	550.900	13	49	54	236	179	13	13	
Schaffhausen	Schaffhausen	73.400	1	52	97	324	86	1	1	
Uri	Altdorf	35.000		54	136	305	209	-		
Lucerne	Lucerne	350.600	7	65	97	266	217	7	7	
Glarus	Glarus	38.300	1	71	153	346	145	1		
Schwyz	Schwyz	131.400	2	73	135	303	190	2		
Nidwalden	Stans	38.600	1	78	110	278	230	1		
Appenzell Ausser.	Herisau	53.200	-	84	164	357	90	-		
Obwalden	Sarnen	32.700	1	85	117	264	237	1		
St. Gallen	St. Gallen	452.600	8	86	165	358	83	8		
Appenzell Inner.	Appenzell	15.000	-	100	179	372	79	-		
Graubünden	Chur	185.700	6	123	205	398	127	6		
Ticino	Bellinzona	311.900	1	190	236	405	342	1		
Zürich Airport		3.827.000	83							
Basel-Stadt	Basel	186.700	6	86	-	251	217	6	6	
Basel-Landschaft	Liestal	261.440	12	80	18	234	210	12	12	
Jura	Delémont	69.100	-	119	43	202	249		-	
Solothurn	Solothurn	245.500	2	97	69	180	228	2	2	
Bern (Berne)	Bern	947.100	28	126	98	159	237		28	
Neuchâtel	Neuchâtel	166.500	1	151	123	123	281		1	
Fribourg	Fribourg	239.100	1	159	131	138	289		1	
Basel Airport		2.115.440	50							
Geneva	Geneva	414.300	5	279	251	-	410			5
Vaud	Lausanne	626.200	6	229	201	64	360			6
Valais	Sion	278.200	5	280	252	164	411			5
Geneva Airport		1.318.700	16							
Switzerland		7.261.140	149	<--No overlap	With overlap-->			103	110	16

Encl. 8. re. Switzerland: The Bodensee-Airport Friedrichshafen (D)

South of the border to Germany, and not far from the Austrian border, there is the Bodensee-Airport Friedrichshafen airport, which had just under 600.000 passengers in 2005 (535.000 in 2004). However, since it is located 166 km from Zurich, it will hardly be considered an alternative to Zurich by many Swiss people.²⁴

Figure 68 Friedrichshafen Bodensee Airport – on the German side



Source: http://de.wikipedia.org/wiki/Bild:Karte_Bodensee.png

Within a 100 km catchment area of Friedrichshafen in Southern Germany there is a population of 2,1 million people, of which 55% from Germany²⁵, 17% from Austria (Vorarlberg) and 28% from Switzerland (St. Gallen, Schaffhausen, Appenzell ..). There were only 22 information requests sent to Destination Bornholm in 2005 from the catchment area around Friedrichshafen Bodensee Airport. Of these only 2 came from Switzerland, only 1 from Austria and the rest, 19, from Germany. So, Friedrichshafen in southern Germany is *not* an alternative to Zurich (or Basel) as a potential departure airport for flights to Bornholm.

Table 35 Friedrichshafen in Southern Germany: Not an alternative to Zurich for flights to Bornholm

Country	Catchment	Catchment %	Requests
Germany	1.173.865	55%	19
Austria	360.168	17%	1
Switzerland	594.200	28%	2
Friedrichshafen	2.128.233	100%	22

²⁴ <http://www.fly-away.de/en/tourism/3countries-1airport/frame3countries1airport>

²⁵ Region Bodensee-Oberschwaben, Landkreis Konstanz, Lindau, Kempten, Memmingen, Tuttlingen.

Encl. 9. Homepages of hotels at Bornholm

Hotel name	Web site	E-mail	Rooms
Hotel Griffen	www.Bornholmhotels.dk	info@hotelgriffen.dk	142
Hotel Ryttergården	www.hotel-ryttergaarden.dk	info@hotel-ryttergaarden.dk	133
Hotel Balka Søbad	www.hotel-balkasoebad.dk	mail@hotel-balkasoebad.dk	106
Hotel Balka Strand	www.hotelbalkastrand.dk	mail@hotelbalkastrand.dk	95
Hotel Abildgård	www.hotel-abildgaard.dk	mail@hotel-abildgaard.dk	83
Radisson SAS Fredensborg	www.bornholmhotels.dk	info@hotelfredensborg.dk	72
Hotel Friheden	www.hotel-friheden.dk	post@hotel-friheden.dk	59
Hotel Sandkås	www.hotelsandkaas.dk	hotelsandkaas@mail.tele.dk	56
Strandhotellet	www.strandhotellet.dk	bornholm@strandhotellet.dk	52
Dueodde Badehotel	www.dueodde-badehotel.dk	mail@dueodde-badehotel.dk	51
Hotel Hammersø	www.hotel-hammersoe.dk	kjaer@hotel-hammersoe.dk	50
Hotel Romantik	www.hotel-romantik.dk	bornholm@hotel-romantik.dk	44
Hotel Pepita	www.pepita.dk	info@pepita.dk	36
Gretha's Pension	www.grethaspension.dk	info@grethaspension.dk	33
Hotel-Restaurant Skovly	www.hotel-skovly.dk	info@hotel-skovly.dk	30
Snogebæk Hotelpension	www.zzz-zzz.dk	shop@zzz-zzz.dk	25
Pension Slægtsgården	www.slaegtsgaarden.dk	info@slaegtsgaarden.dk	25
Grønbechs Hotel	www.groenbechs-hotel.dk	groenbechs-hotel@tdcadsl.dk	24
Pension Klostergården	www.pension-klostergaarden.dk	info@pension-klostergaarden.dk	24
Hotel Klintely	www.familieferiebornholm.dk	info@familieferiebornholm.dk	24
Sverre's Small Hotel	www.sverres-hotel.dk	sverreshotel.dk@mail.tele.dk	20
Byskrivergaarden Hotel Ga	www.byskrivergaarden.dk	hotel@byskrivergaarden.dk	20
Pension Koch	www.familieferiebornholm.dk	info@familieferiebornholm.dk	18
Jantzens Hotel	www.jantzenshotel.dk	jantzenshotel@mail.dk	16
Therns Hotel	www.therns-hotel.dk	post@therns.dk	13
Ny Søborg spise & sovehus	www.ny-soeborg.dk	info@ny-soeborg.dk	12
Pension Langebjerg	www.langebjerg.dk	langebjerg@mail.dk	12
Hotel Casa Blanca	hotel-bornholm.com/hotels/gudhjem	hotel.casa-blanca.gudhjem@mail.c	33
Pension Solgården	www.pension-solgaarden.dk	solgaarden@mail.tele.dk	18
Pension Sandbogaard	www.sandbogaard.dk	sandbogaard@mail.dk	21
Hotel Gudhjem	www.hotelgudhjem.dk	info@hotelgudhjem.dk	57
Hotel Siemensens Gaard	www.siemensens.dk	hotel@siemensens.dk	49
Hotel Sandvig	www.hotel-sandvig.dk/	Contact formular @ home page	45
Hotel Allinge	www.hotelallinge.dk	hotel.allinge@bornholm.net	36
Hotel-Pension Verona	verona.dk/	verona@bornnet.dk	27
Hotel Sjølyst	www.sjolyst.dk	hotel-sjolyst@mail.tdcadsl.dk	26
Hotel Nordland	www.hotel-nordland.dk	info@hotel-nordland.dk	24
Badehotel Melsted	www.melsted-badehotel.dk	info@melsted-badehotel.dk	21
Hotel Herold	www.hotelherold.dk	helle@hotelherold.dk	18
Hotel Pension Klippen	www.pension-klippen.dk/	klippen@bornholm.net	17
Hotel Pension Mary	www.pensionmary.dk	larsen@pensionmary.dk	17
Pension 'Lindesdal'	www.lindesdal.dk	k.mckay@mail.dk	14
Pension Holmegård	www.pensionholmegaard.dk	holmegaard.6@get2net.dk	12
Næsgården	www.naesgaarden.dk	mail@naesgaarden.dk	10
Christiansø Kro & Gæstgiv	www.christiansoekro.dk	christiansoekro@postkasse.com	6
Mckay's (Pension Lis)	www.bornholm.net/pension/lis/ind	NA	6
Danchels Hus	www.danchelshus.dk/	info@danchelshus.dk	3
Total			1.735

Tidligere udgivelser

- Anna Pallikaras: *Fart på lokale fødevarer – en rapport fra bornholm og de danske småøer*. Marts 2006.
- Per Åke Nilsson: *The Norwegian Coastal Express (Hurtigruten/Pikareitti)*. An alternative for the Gulf of Bothnia? December 2005.
- Carl Henrik Marcussen: *Destination Danmark på nettet*. Online booking af danske feriehuse, hoteller og andre overnatningstjenester 2004-2005. August 2005.
- Per Åke Nilsson: *The White Sea Extension*. Possible tourism connections between the Bothnian Arc Region and Russian Karelia. August 2005.
- *Cruise tourism in the Baltic and Bothnian Sea – A pilot study on maritime tourism*. Seagull. An EU Interreg III B project. Februar 2005.
- Ann Hartl: *Developing marketing strategies for tourism destinations in peripheral areas of Europe: the case of Bornholm*. December 2004.
- *Bornholms udviklingsmuligheder*. Bilagsrapport. December 2004.
- *Bornholms udviklingsmuligheder – en SWOT-analyse*. December 2004.
- *Forskning på klippegrund*. CRT 1994-2004. Oktober 2004.
- Jesper Manniche: *Digitalt Bornholm*. Ikt-mæssig opkvalificering af øvrige erhverv – Visioner, aktiviteter og resultater. Marts 2004.
- Anders Hedetoft: *Regional fødevarerproduktion*. Rammebetingelser og udviklingsmuligheder på Bornholm. Januar 2004.
- Nick Johns og Szilvia Gyimothy: *Varemærket kro*. Danske kroers brand mytologi. December 2003.
- Svend Lundtorp: *Free Riders in Tourism*. Oktober 2003.
- Peter Billing og Tage Petersen: *På egne ben i nye omgivelser*. Sydöstra Skåne og Bornholms möjligheter i Öresundsregionen. Udarbejdet for samarbejdet Sydöstra Skåne/Bornholm. August 2003.
- Carl Henrik Marcussen: *Undersøgelse af hindringer for transittrafik mellem Bornholm og det øvrige Danmark gennem Sverige*. Udarbejdet for samarbejdet Sydöstra Skåne/Bornholm. August 2003.
- Ann Hartl: *Survey of Visitors to Bornholm*. January - December 2002. June 2003.
- Per Åke Nilsson: *Turismeerhvervet på Bornholm - netværksarbejde og omstrukturering*. Juli 2002.
- Per Åke Nilsson: *Rekreation og tilgængelighed i et tætbeholdt område - brug og attituder i det agrare Danmark*. Juni 2002.
- Ann Hartl and Charlotte R. Rassing: *Survey of Visitors to Bornholm*. January 2001 - December 2001. Maj 2002.
- Tage Petersen: *Strategier for kompetenceudvikling i det bornholmske turismeerhverv*. September 2001.
- Jesper Manniche og Lars Nyberg: *Bornholm fra industri- til informationssamfund*. Regionale perspektiver af transportændringerne og den informationsteknologiske udvikling. August 2001.
- Charlotte R. Rassing og Johnny Rassing: *STEAM for Færøerne maj 2000 - april 2001 sammenlignet med maj 1999 - april 2000*. August 2001.
- Szilvia Gyimothy et al: *Kulturarv*. Du er guiden! Juli 2001.
- Charlotte R. Rassing og Anders Sørensen: *Revideret udgave*. Spørgeskemaundersøgelse af personer, der afrejser Færøerne, 15. maj 1999 - 14. maj 2000. Marts 2001.
- Charlotte R. Rassing: *Survey of Visitors to Bornholm*. January 2000 - December 2000. Februar 2001.
- Jesper Manniche: *Forudsætninger og muligheder for den fremtidige IKT-udvikling på Bornholm*. En regional IKT-analyse. November 2000.
- Charlotte R. Rassing og Anders Sørensen: *Spørgeskemaundersøgelse af personer, der afrejser Færøerne*, 15. maj 1999 - 14. maj 2000. Oktober 2000.
- Tage Petersen: *Rammer for en bornholmsk videregående uddannelsesstrategi*. Juni 2000.
- Jie Zhang og Charlotte Rassing: *Tourism Impact Studies*. The Case of Bornholm. Maj 2000.
- Jesper Manniche og Lars Nyberg: *Erhvervsliv, transporter og udviklingsbetingelser på Bornholm*. Rapport fra en spørgeskemaundersøgelse. Maj 2000.
- Szilvia Gyimothy: *The Quality of Visitor Experience*. A Case Study in Peripheral Areas of Europe. Ph.d.-afhandling. Maj 2000.
- Charlotte R. Rassing: *Survey of Visitors to Bornholm*. January 1999 - December 1999. April 2000.
- Anders Sørensen: *Travellers in the periphery*. December 1999.
- Svend Lundtorp: *Statens engagement på Bornholm*. November 1999.

- Jie Zhang og Charlotte R. Rassing: Dansk sammendrag af: Betydningen af turismen på Bornholm. Oktober 1999.
- Carl Henrik Marcussen: Internet Distribution of European Travel and Tourism Services. The Market, Transportation, Accommodation and Package Tours. August 1999.
- Edited by Frances Brown and Derek Hall: Case Studies of Tourism in Peripheral Areas. August 1999.
- Anders Hedetoft og Jesper Manniche: De bornholmske landdistrikter. Analyse af udviklingsrammer og muligheder. August 1999.
- Charlotte Rassing og Svend Lundtorp: Konkurrence mellem overnatningsformer. Juli 1999.
- Susanne Storm: Air Transport Policies and Frequent Flyer Programmes in the European Community - a Scandinavian Perspective. Maj 1999.
- Peter Saabye Simonsen, Birgitte Jørgensen, Derek Robbins: Cycling tourism. Marts 1999.
- Charlotte Rømer Rassing: Survey of Visitors to Bornholm. January 1998 - December 1998. Februar 1999.
- Edited by Jesper Manniche: Searching and Researching the Baltic Sea Region. Proceedings from an international research seminar on Bornholm, April 1998. December 1998.
- Petter Dybedal: Theme Parks as Flagship Attractions in Peripheral Areas. December 1998.
- Carl Henrik Marcussen, Mulighederne for forbedret udnyttelse af IT til markedsføring og slag/distribution af bornholmske turismeprodukter. Oktober 1998.
- Benedicte Bull: Encouraging Tourism Development Through the EU Structural Funds - the implementering of EU programmes on Bornholm and the tourism sector's use of them. September 1998.
- Per Åke Nilsson: Bo på Lantgård - en studie av bondgårdsturism som idé. Juli 1998.
- Ed. by Jesper Manniche: Baltic Social Science Research in Scandinavian countries and Germany. State of the Art. Juli 1998.
- Lars Lund og Ulrik Storm: Bornholms Teknologiske Udvikling - Vurdering af konkrete forslag til IT-investeringer. Maj 1998.
- Tomas Vedsmand: Fiskeriets regulering og erhvervsudvikling - i et institutionelt perspektiv. Ph.d.-afhandling. Maj 1998.
- Carl Henrik Marcussen: Distribution af danske turismeprodukter i Europa - status, trends og udviklingsmuligheder. Maj 1998.
- Charlotte R. Rassing: Survey of Visitors to Bornholm, January 1997 - December 1997.
- Kresten Storgaard, Birgit Jæger, Jesper Manniche, Carl Henrik Marcussen, Jimmi Hansen, Sune Johansson: Bornholm på Nettet. December 1997.
- Kresten Storgaard, Jesper Manniche, Jimmi Hansen: IT-initiativer på Bornholm. BTU-projektets handlingsrettede arbejde. December 1997.
- Tage Petersen: Videregående uddannelsesinstitutioner og regional udvikling i perifere områder - et case-studie på Gotland. December 1997.
- Jie Zhang og Svend Lundtorp: Bornholms Trafikkens økonomiske og beskæftigelsesmæssige betydning for Bornholm. Oktober 1997.
- Charlotte R. Rassing: STEAM. Datainput og -bearbejdning. Oktober 1997.
- Charlotte R. Rassing: STEAM for Allinge-Gudhjem Kommune. 1995 sammenlignet med 1996. Oktober 1997.
- Charlotte R. Rassing: STEAM for Ebeltoft Kommune. 1995 sammenlignet med 1996. Oktober 1997.
- Charlotte R. Rassing: STEAM for Sydthy Kommune. 1995 sammenlignet med 1996. Oktober 1997.
- Charlotte R. Rassing og Ann. Hartl-Nielsen: Survey of Visitors to Bornholm, January 1996 - December 1996. August 1997.
- Elin Sundgaard: Hotel- og restauranterhvervet - med Bornholm som case. Juni 1997.
- Ann. Hartl-Nielsen, Charlotte Rømer Rassing and Stephen Wanhill: Survey of Visitors to Bornholm. October - December 1996. Juni 1997.
- Ann. Hartl-Nielsen, Charlotte Rømer Rassing and Stephen Wanhill: Survey of Visitors to Bornholm. July - September 1996. Juni 1997.
- Jie Zhang: The Economic Relations between the European Union and East Asia. Ph.D. thesis. Juni 1997.
- Birgit Jæger & Kresten Storgaard (eds.): Telematics and rural development. Proceedings from an International Workshop on the Danish Island of Bornholm. Juni 1997.

- Svend Lundtorp: Turisme - struktur, økonomi og problemstillinger. Maj 1997.
- Palle Mikkelsen: Status for Bornholm. April 1996.
- Ann. Hartl-Nielsen, Charlotte Rømer Rassing and Stephen Wanhill: Survey of Visitors to Bornholm. July 1995 - June 1996. April 1997.
- Anne-Mette Hjalager: Environmental regulation of tourism. Strategies and prospects on three European islands: Bornholm, Mallorca and the Isle of Wight. November 1996.
- Udkantsområder - Regional- og turismeforskning på Bornholms Forskningscenter. En antologi. November 1996.
- Louise Twining-Ward og Tom Twining-Ward: Tourist Destination Development. The Case of Bornholm and Gotland. November 1996.
- Peter Saabye Simonsen og Birgitte Jørgensen: Cykelturisme. En økonomisk og miljømæssig bæredygtig turismereform? Oktober 1996.
- Carl Henrik Marcussen: Turistinformations- og bookingsystemer. Oktober 1996.
- Steen Schønemann: Bornholm: Economic Structures and Development. Oktober 1996.
- Ann. Hartl-Nielsen, Charlotte Rassing Riis, Stephen Wanhill: Survey of Visitors to Bornholm. April - June 1996. Oktober 1996.
- Ann. Hartl-Nielsen, Charlotte Rassing Riis, Stephen Wanhill: Survey of Visitors to Bornholm. January - March 1996. Oktober 1996.
- Ann. Hartl-Nielsen, Charlotte Rassing Riis, Stephen Wanhill: Survey of Visitors to Bornholm. October - December 1995. Oktober 1996.
- Birgitte Nohr Jørgensen: Beskæftigelsesfremskrivninger i RIMO og EMIL. September 1996.
- Stephen Wanhill: Survey of Visitors to Bornholm. July - September 1995. September 1996.
- Kresten Storgaard, Jesper Manniche, Carl Henrik Marcussen: Teknologi-anvendelse og -fornyelse i bornholmske erhverv. September 1996.
- Anne-Mette Hjalager: Miljøinitiativer i turisme og fritid. August 1996.
- Keld Jensen og Tage Petersen: Uddannelsespolitik i et udkantsområde. Juni 1996.
- Keld Jensen og Tage Petersen: Analyse af uddannelsesstrukturen på det bornholmske arbejdsmarked. Juni 1996.
- Anders Fitje: Naturbasert oplevelsesturisme på Bornholm. April 1996.
- Thomas Rafn: Turismens økonomiske betydning for de danske amter. April 1996.
- Kirstin Blomgren Jørgensen: Kirkerne og turismen. Marts 1996.
- Stephen Wanhill: Principles of Tourist Destination Development. Januar 1996.
- Keld Jensen: Befolkningsudviklingen på Bornholm. December 1995.
- Tage Petersen: Interreg-Bornholm. December 1995.
- Birgit Jæger, Jesper Manniche, Carl Henrik Marcussen og Kresten Storgaard: Telematik. Nye veje for Bornholm? November 1995.
- Svend Lundtorp: Denmark og EU's Committee of Regions. Juni 1995.
- Jesper Manniche: Informationsteknologi i bornholmske erhverv. Juli 1995.
- Thomas Rafn: Turismens økonomiske betydning for Bornholm. Juni 1995.
- Susanne Jensen og Christian Hansen: Turisme og beskæftigelse. Marts 1995.
- Steen Schønemann: En ø uden tilskud. Januar 1995.
- Steen Schønemann: Bornholms befolkning, erhvervsstruktur og udvikling. Marts 1994.