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The Polish Market for Holidays on Bornholm – By Sea and Air

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Acknowledgement: Includes contributions by Jagna Noren, Anna Pallikaras and Lene Feldthus Andersen

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Foreword

The project was initiated by Bornholm Airport, Destination Bornholm, the Regional Municipality of Bornholm and Danvifo and funded by Bornholm's Growth Forum, the Regional Municipality of Bornholm and Bornholm Airport. The objective was twofold:

- On the one hand, to address the question of how to improve accessibility to Bornholm for visitors from Poland;
- On the other hand, to address the question of how to encourage the visitors from Poland to stay longer once on Bornholm.

In 2006 there were 72% one day visitors among the Polish arrivals from Poland via Nexø and 38% one day visitors from Poland via Rønne. Altogether there were 47.000 passengers (23.500 arrivals) from Poland via Nexø in 2006, and about 12.000 passengers (6.000 arrivals) via Rønne. Of these 59.000 passengers (29.500 arrivals) 35% or 10.300 stayed overnight. Close to 90% or about 9.200 were Poles of which 6.100 came via Nexø and 3.100 via Rønne. The Polish visitors who came via Nexø stayed on average 2.5 nights. Those who came via Rønne stayed at least 5 nights, resulting in just over 30.000 bed nights in total, corresponding to just about one night on average per Polish arrival to Bornholm. There were just below 20.000 registered polish bed nights in 2006, distributed as follows:

- 71% in official camping sites (71%),
- 28% in hotels/holiday centres and
- 1% in youth hostels (1%).

The remaining 10.000 Polish bed nights were in holiday cottages, other types of camping sites and other alternative types of accommodations (B & B, farm holidays etc.).

Bornholm had about 18% of all Polish registered bed nights in Denmark in 2006 and as much as 35% of all the ferry passengers on routes between Poland and Denmark. Thus Bornholm has a prominent position on the Polish market compared to other destinations in Denmark. Even so, we believe that Bornholm's position on the Polish market can be improved.

When it comes to making the Polish visitors stay on Bornholm for a holiday and not just one day excursions, there are development opportunities by both sea and air. These development opportunities are investigated in this report. In 2006, Bornholm succeed in attracting two new scheduled summer routes from Hamburg and Oslo which supplemented the seasonal route from Billund, established in 2005. With Bornholm Airport as one of the initiators of the project, naturally the possibility for air-based trips to Bornholm is illuminated in the report. Expanding the ferry service is however also discussed. Currently there are a handful of ships by five different ferry lines, offering Poles the opportunity to travel directly to Bornholm: Jantar, Lady Assa and Pomerania all based in Poland plus BornholmExpress making a few tours mainly for Bornholm residents and finally Bornholmstrafikken with its ferry route to Sassnitz and connecting bus service from Stettin. Particularly the plans which have been underway for some time for building a medium-sized car ferry that would sail all year will be discussed.

Mikkel Jensen	Peter Hviid
Destination Bornholm	Bornholm Airport

Overview of contents

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Introduction

Since the beginning of the millennium the Polish market for air travel has been growing rapidly: From 2005 to 2006 alone, the number of international airplane passengers to and from Poland increased by 38 %. During the same period Polish tourists have increasingly discovered Bornholm as a holiday destination while the only means of transportation between Poland and Bornholm so far, are ferries.

Thus the purpose of the study is to investigate the following questions:

1. How can Bornholm increase the accessibility of Polish tourists to Bornholm?
2. How can Polish visitors be encouraged to stay overnight on the island to a greater extent than in the past?

The project tries to answer these questions by investigation the following issues:

- What does the updated statistics about the Polish economy and the outgoing Polish international tourism say about the potential of the Polish market? This update includes the number of passengers departing by airplanes and ferries as well as Polish bed nights in Denmark and on Bornholm from 2000 or 2002 to and including 2006.
- What are the possibilities of getting more Polish visitors to Bornholm by ferry?
- What are the possibilities of offering Polish visitors air travel to Bornholm?
- Which attractions and types of accommodation could be particularly suited for Poles visiting Bornholm by ferry or plane, respectively?
- What are the possibilities of marketing Denmark, specifically Bornholm, in Poland, and how can Bornholm best be promoted in Poland (directly or via agents or tour operators)?

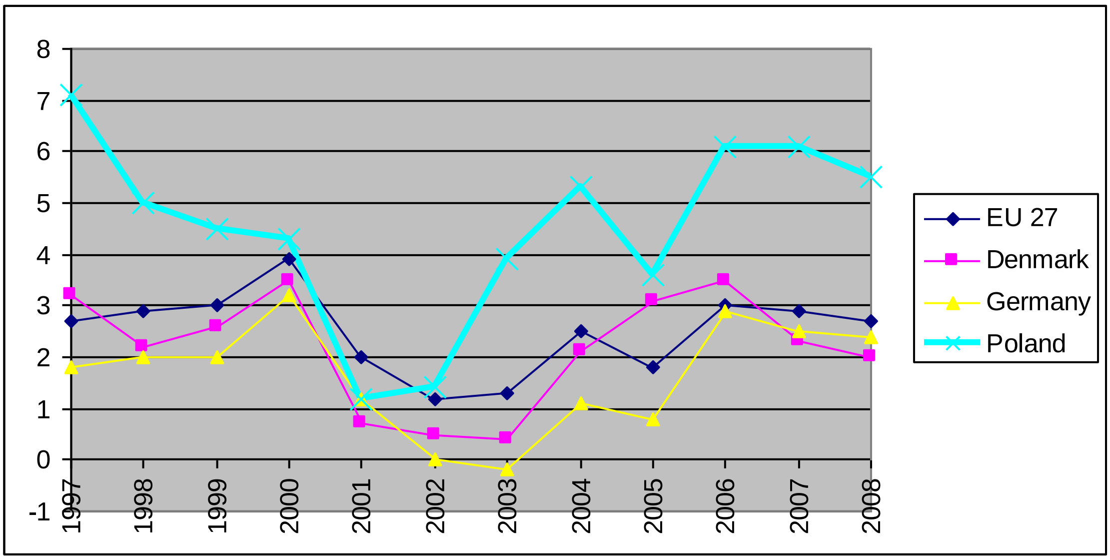
The central outputs of the project are:

- A final report as well as separate memos and power point presentations.
- A survey among departing passengers on the scheduled summer airline routes Hamburg-RNN, Oslo-RNN, Billund-RNN. The results are presented in Enclosure C.
- A round of interviews among tour operators and airlines in Poland. The results are summarized in the last section of chapter 7 and presented in full in Enclosure B.
- A summary of existing analysis and knowledge of the Polish market. It is presented in full in Enclosure D (in Danish).

Economy and demographics, Poland

In Poland, economic growth has been above the EU average every year since 1997 with the exception of 2001. In Germany, 2002 and 2003 were difficult years with no/negative growth.

Figure 1 Real GDP growth in percent per year in Poland and other EU countries 1997-2006, 2007, 2008



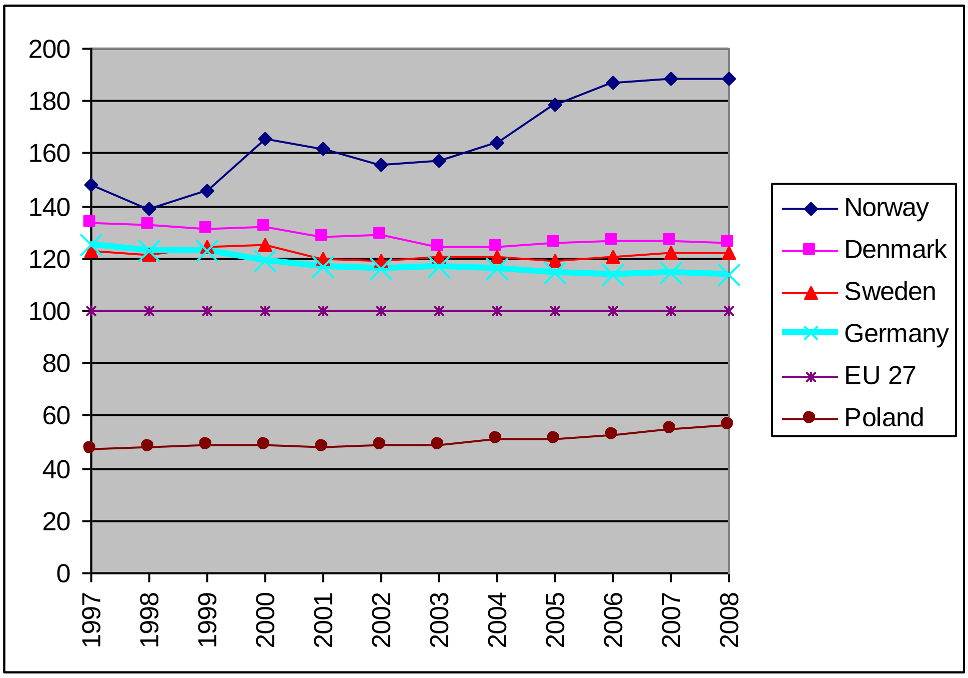
Source: Eurostat, Real GDP growth rate.

In 2008 the purchasing power per capita in Poland is expected to be 57% of the EU average, up from 49% in 2003, the year before Poland became a member of the EU (se figure 2).

The population in Poland has declined slightly over the past 10 years, but there are still 38 million people living in Poland. There are close to half as many people living in Poland as in Germany and almost twice as many in Poland as in Denmark, Sweden and Norway (Scandinavia) in total (se figure 3).

In Poland, there are relatively more young people and relatively fewer older people than in Germany, Scandinavia and the EU overall. However in the middle-aged range, from 25-64, when people are typically in the labour market, Poland, Germany and Denmark are about the EU average. Comparing Poland and Germany, there are relatively many young people in Poland, relatively many elderly people in Germany (se figure 4).

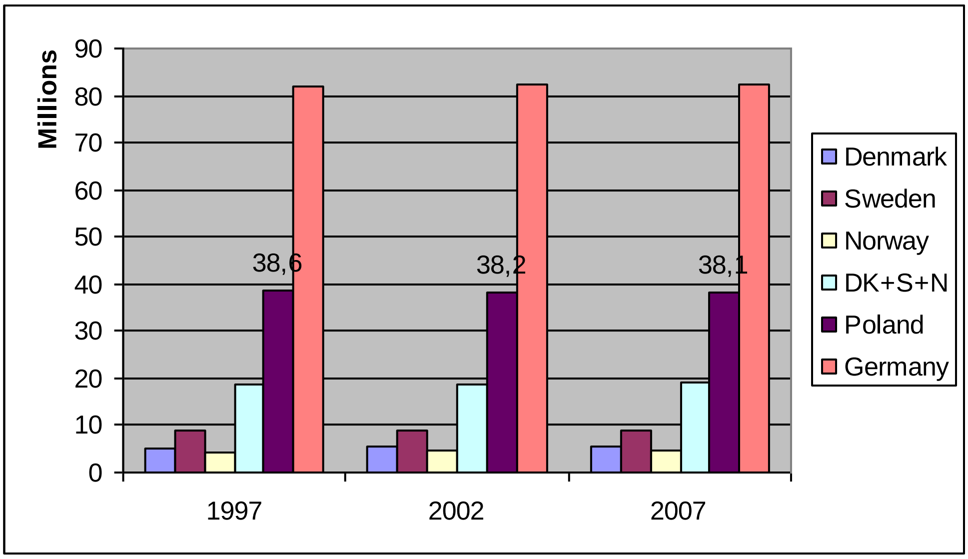
Figure 2 GDP per capita in Purchasing Power Standards (PPS) (EU-27 = 100)



Source: Eurostat, Real GDP growth rate.

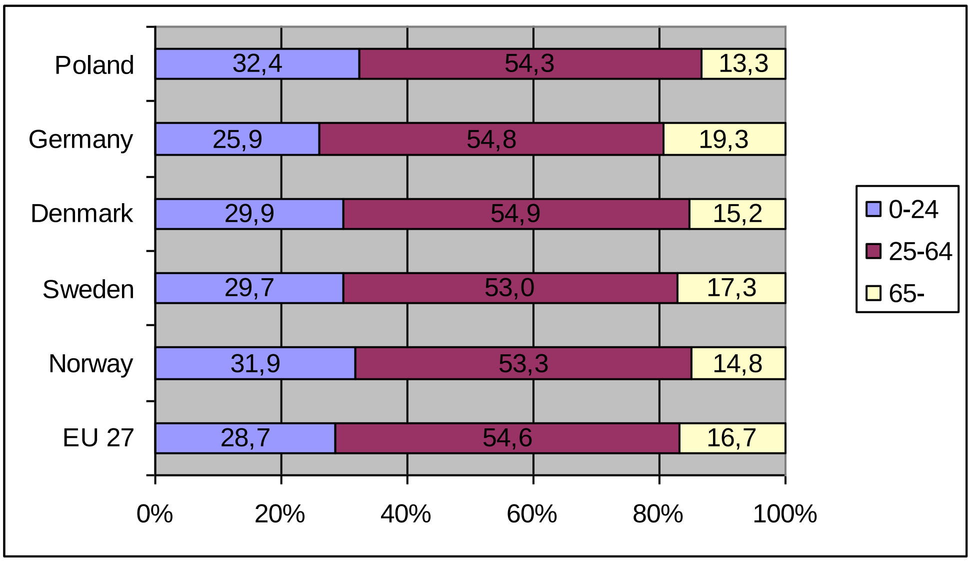
The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

Figure 3 Population in Poland, Germany, and Scandinavia 1997, 2002, 2007



Source: Eurostat.

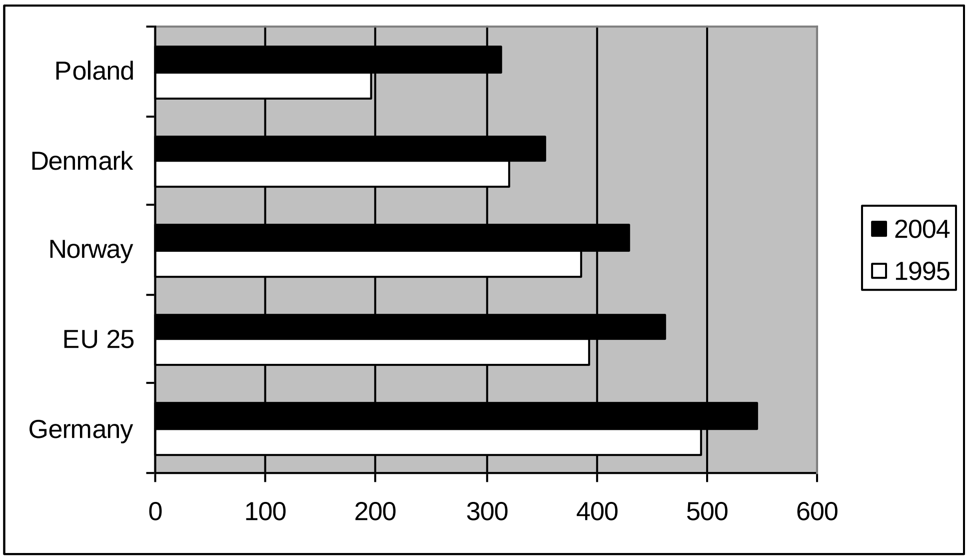
Figure 4 Age distribution in Poland, Germany, Scandinavia and the EU, 2006



Source: Eurostat.

The number of cars per 1000 inhabitants in Poland is quickly approaching the same level as in Denmark.

Figure 5 Cars per 1000 inhabitants in Poland, Scandinavia, Germany and the EU, 1995 and 2004



Source: Eurostat.

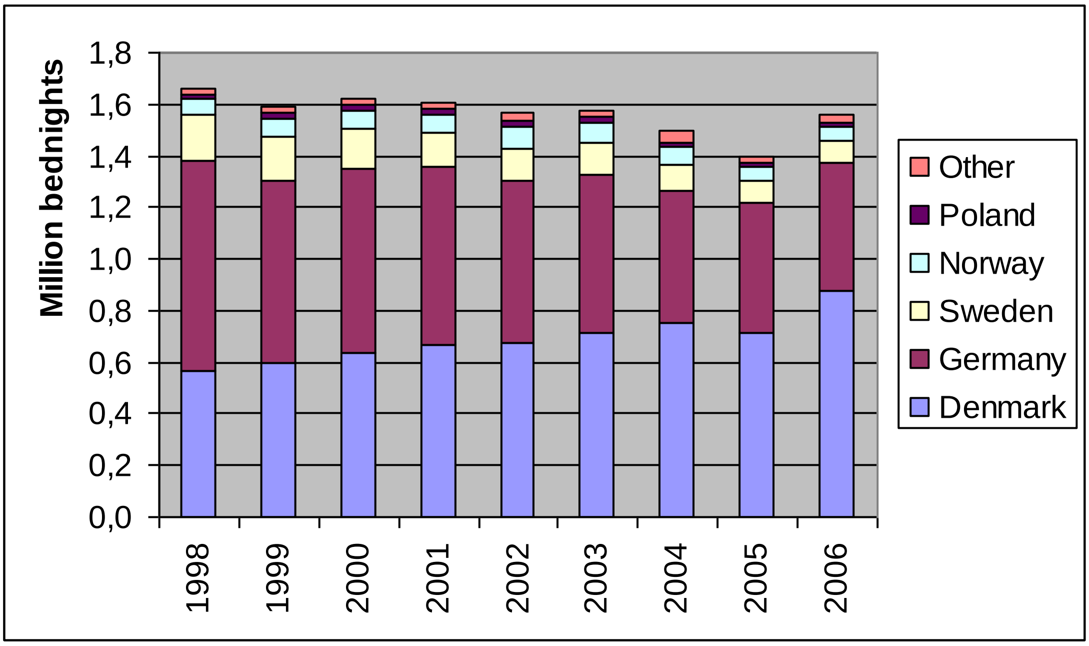
The increasing number of cars in Poland reflects the increasing wealth in Poland.

Tourism on Bornholm – from Poland and in general

Accommodation

In 2006 Bornholm had almost 1.6 million registered bed nights.

Figure 6 Registered bed nights on Bornholm by market, 1998-2006



Source: Based on data reported to Danmarks Statistik.

Table 1 Registered bed nights on Bornholm by market, 1998-2006

Bornholm	2000	2001	2002	2003	2004	2005	2006
Denmark	39%	42%	43%	45%	50%	51%	56%
Germany	44%	43%	40%	39%	34%	36%	32%
Sweden	9%	8%	8%	8%	7%	6%	6%
Norway	5%	4%	6%	5%	5%	4%	3%
Poland	**1,2%**	**1,3%**	**1,5%**	**1,3%**	**1,0%**	**1,2%**	**1,3%**
Other	1%	1%	2%	2%	3%	2%	2%
Bornholm	100%	100%	100%	100%	100%	100%	100%
Mio. nights	1,62	1,61	1,56	1,58	1,50	1,40	1,56

Source: Based on data reported to Danmarks Statistik.

There were 20.000 registered Polish bed nights on Bornholm in 2006 for three types of accommodation only: Hotels/holiday centres, camping and youth hostels. Holiday cottages and nights spent on sailing boat in ports on Bornholm were not included. Also some Polish tourists stay at camping sites that do not report bed nights to Denmark's Statistics. So, with these three additional types of accommodation there were probably 30.000 Polish bed nights on Bornholm in 2006. However that means just one night per Polish visitor on average, indicating a rather large potential for increasing the number of Polish bed nights on Bornholm. As we shall see below, there is already an increase of Polish bed nights on Bornholm in 2007 of about 10% (based on the first eight months).

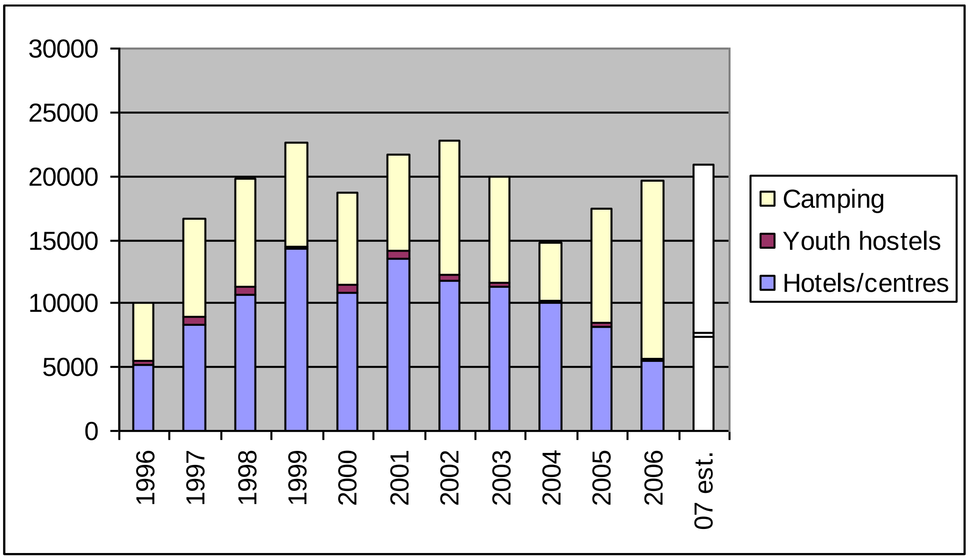
There were 43.000 persons living on Bornholm by the beginning of 2007, i.e. 0.8% of the population of Denmark (5.45 million).

There are Poles living in Denmark and on Bornholm: 0.3% of the people living in Denmark are born in Poland and correspondingly 0.3% of the persons living on Bornholm are born in Poland. Thus although Bornholm is close to Poland there is not more Polish-born people living on Bornholm than in the rest of Denmark. Specifically, there are 44 Polish males and 72 Polish females living on Bornholm.

- Bornholm has 0.8% of Denmark's population.
- Bornholm had 3.5% of the registered bed nights in Denmark in 2006.
- But Bornholm had 18% of the bed nights of Polish visitors in Denmark in 2006.

So, Bornholm is obviously a popular Danish holiday destination in Poland as Bornholm gets a high share of the Polish bed nights in Denmark.

Figure 7 Polish registered bed nights on Bornholm, 1996-2006, est. 2007

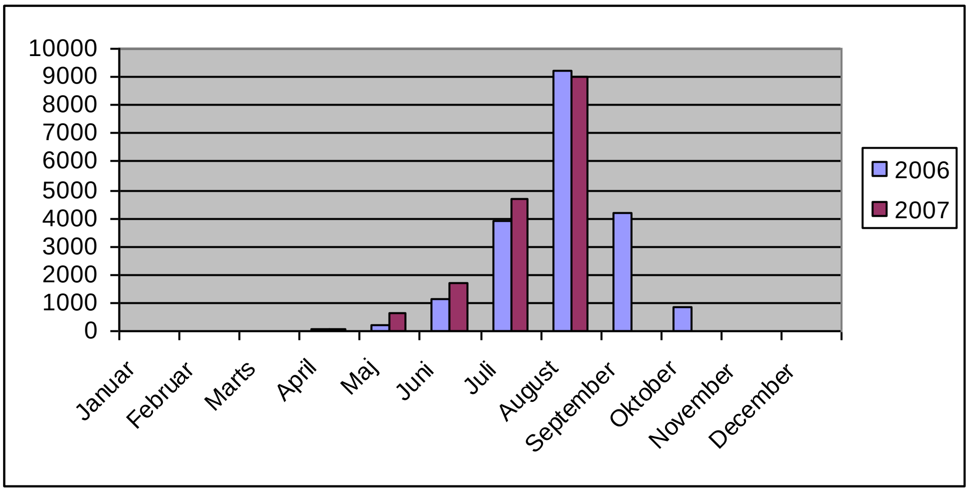


Source: Danmarks Statistik, according to VisitDenmark.com.

Note: The 2007 estimate is based on the first 8 months, representing about 74% of the full year.

During the first eight months of 2007 the number of registered Polish bed nights on Bornholm was 10% higher than for the corresponding period in 2006.

Figure 8 Increase of 10% in number of Polish bed nights on Bornholm during first 8 months in 2007



Bornholm had 17% of the Polish bed nights in Denmark in 2006. Although there is a fair increase in the number of bed nights during the first eight months of 2007 of 10%, the corresponding increase for all Polish bed nights in Denmark as a whole is higher, namely 44%. So, Bornholm's share of Polish bed nights in Denmark is likely to be a little lower in 2007.

There was a particularly high increase in the number of bednights in youth hostels during the first eight months of 2007 compared to the corresponding period of 2006 (+155%). One explanation could be the new route by the Low Cost Carrier, LCC, Norwegian to Copenhagen bringing in more Polish visitors there. That does not appear to be the reason as the growth in Copenhagen was 71% for Polish youth hostel bednights. Only 12% of the increase in Polish youth hostel bednights are in the Capital region and over half was in Zealand and Southern Denmark. A possible explanation could be Polish workers staying in youth hostels while working in Denmark.

Table 2 Polish youth hostel bed nights are increasing quickly in Denmark as a whole

	Region Capital	Region Sealand	Region Syddanmark	Region Midtjylland	Region Nordjylland	DK
Jan-Aug 2006	2.457	2.188	2.268	2.382	398	9.693
Jan-Aug 2007	4.192	7.679	6.822	3.670	2.381	24.744
Change %	71%	251%	201%	54%	498%	155%
Change, abs.	1.735	5.491	4.554	1.288	1.983	15.051
Split of increase	12%	36%	30%	9%	13%	100%

Table 3 Increasing number of Polish bed nights during 2007, both on Bornholm and in Denmark overall

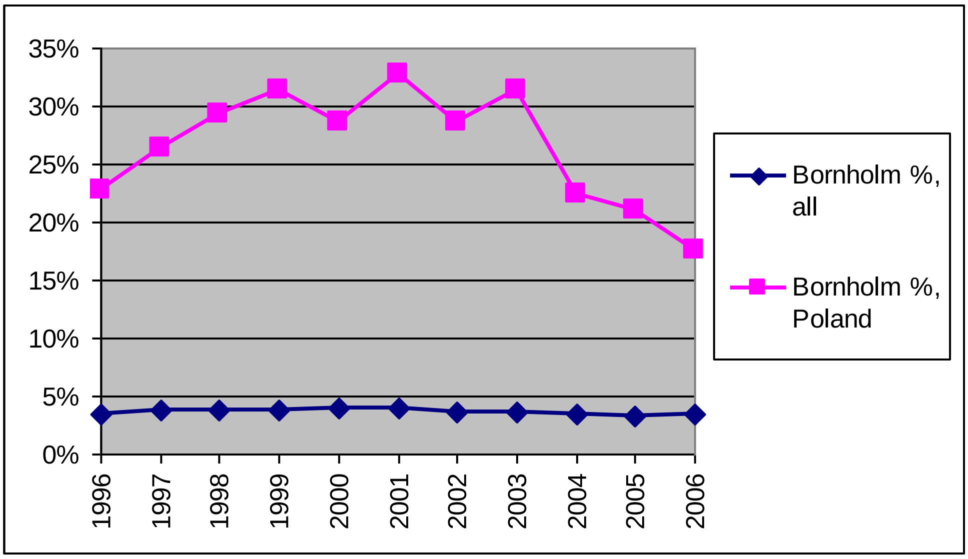
Bornholm	Hotels/centres	Youth hostels	Camping	Three types	% of full year
All of 2006	5.428	279	13.985	19.692	100%
Jan-Aug 2006	5.210	279	9.153	14.642	74%
Jan-Aug 2007	7.138	303	8.650	16.091	
Change	37%	9%	-5%	10%	

Bornholm	Hotels/centres	Youth hostels	Camping	Three types
All of 2006	28%	1%	71%	100%
Jan-Aug 2006	36%	2%	63%	100%
Jan-Aug 2007	44%	2%	54%	100%

Denmark	Hotels/centres	Youth hostels	Camping	Three types	% of full year
All of 2006	49.357	19.396	43.816	112.569	100%
Jan-Aug 2006	32.579	9.693	28.129	70.401	63%
Jan-Aug 2007	37.075	24.744	39.264	101.083	
Change	14%	155%	40%	44%	

Denmark	Hotels/centres	Youth hostels	Camping	Three types
All of 2006	44%	17%	39%	100%
Jan-Aug 2006	46%	14%	40%	100%
Jan-Aug 2007	37%	24%	39%	100%

Figure 9 Bornholm's share of all bed nights in Denmark and Bornholm's share of Polish bed nights in Denmark.



Source: Based on data from Danmarks Statistik, according to VisitDenmark.com.

Attractions and activities

Some of the main attractions on Bornholm are:

- Joboland amusement park, www.joboland.dk/index.php?pl (in Polish)
- NaturBornholm experience centre, www.naturbornholm.dk/default.asp?m=341
- Bornholm's Medieval Centre, www.bornholmsmiddelaldercenter.dk/Default.asp?m=86 (Polish)
- The round churches, www.rundkirker.dk/ (in German)
- The museums
- The Butterfly Park in Nexø, http://sommerfugleparken.dk/en/ (English)

NaturBornholm had some 3.000 Polish visitors in 2005, 5.000 in 2006, and will reach at least 7.000 in 2007. NaturBornholm had 69.230 visitors in 2006 and expects 72.000 in 2007 with more Polish visitors than any other attraction on Bornholm. NaturBornholm has been very active in marketing their attraction in the Polish market[1]. In 2006, 14% of the Polish visitors to Bornholm via Nexø went on island bus tours that included a visit to NaturBornholm.[2]

Bornholm's Medieval Centre has about 60.000 visitors per year of which some 2.5% are from Poland. Five percent (5%) of the around 30.000 Polish visitors to Bornholm per year visit the Medieval Centre, i.e. 1500 (2006).

Joboland has over 100.000 visitors per year of which around 1% are from Poland. Four percent (4%) of the around 30.000 Polish visitors per year visit Joboland, i.e. 1200 (2006).[3]

All in all, 14% + 57% = 71% of the Poles who visited Bornholm via Nexø in 2006 went on island bus tours with or without a visit to NaturBornholm (plus about 1.600 Germans via Nexø also going on bus tours). In other words, this is the most popular and common thing for visitors from Poland to do while on Bornholm and as well the most popular paid-for activity apart from the transport itself.

Table 4 Passengers via Nexø and Rønne 2006, arrivals, one day visitors and staying, share of Poles among passengers, and Polish bed nights on Bornholm

2006	Passen-gers	Arrivals	One day visitors	Staying	Polish%	Poles	Average nights, min.	All nights	Registered bednights	Other bednights
Nexø	47.000	23.500	72%	6.580	92%	6.054	2,5	15.134		
Rønne	12.000	6.000	38%	3.720	84%	3.125	5	15.624		
Total	59.000	29.500	65%	10.300	89%	9.178	3,4	30.758	19.692	11.066

Table 5 Talking bus tours is one of the most popular undertakings for Poles visiting Bornholm (2006)

Nexø	Arrivals	Tour %	Tours	Tours
Poles	21.620	71%	15.350	91%
Germans	1.880	84%	1.579	9%
Total, 06	23.500	72%	16.929	100%

Bicycling is also very popular among Polish visitors to Bornholm. As much as 16% go bicycling on their own bike and 7% rent a bike, i.e. 21% cycle around Bornholm among Polish visitors via Nexø and via Rønne the percentage of cyclist is probably higher, since 8% of the passengers on the route Swinoujscie-Rønne came by bicycle (source: statistikbanken.dk) and a high percentage of those coming by car via Rønne bring bicycles. Thus cycling is also a popular and common activity for Polish holiday makers on Bornholm whether one day visitors or longer staying visitors.

[1] Bornholms Tidende, 4th October 2007 p. 1 and 11.
[2] 57% of Polish visitors via Nexø went on an island bus tour which did not include a visit to Natur Bornholm.
[3] http://www.crt.dk/media/Polske_marked_færgetransport_Bornholm_Carl_Henrik_Marcussen_WP29_CRT.pdf

Ferry travel – to/from Poland and to/from Bornholm

Overview of ferry travel

In 2006, more than 1.7 million passengers passed through the sea ports to/from Poland while the airports had 13.1 million international passengers. There were 166.000 passengers on the routes between Denmark and Poland of which 108.000 were between Swinjoucie and Copenhagen. There were 58.000 passengers between Poland and Bornholm of which 47.000 were to/from Nexø and 11.000 to/from Rønne.

"In seaports 1.7 million persons were cleared, i.e. by 2.8% fewer than in the previous year (in 2005 a decline by 35.9% respectively). The sea border crossings in Gdynia and Świnoujście were used by 1.4 million persons (by 0.8% fewer than in the corresponding period of the previous year), which accounted for 82.0% crossings of Poland's border by sea." [4]

Figure 10 Passengers between Poland and Denmark per year, 1992-2006

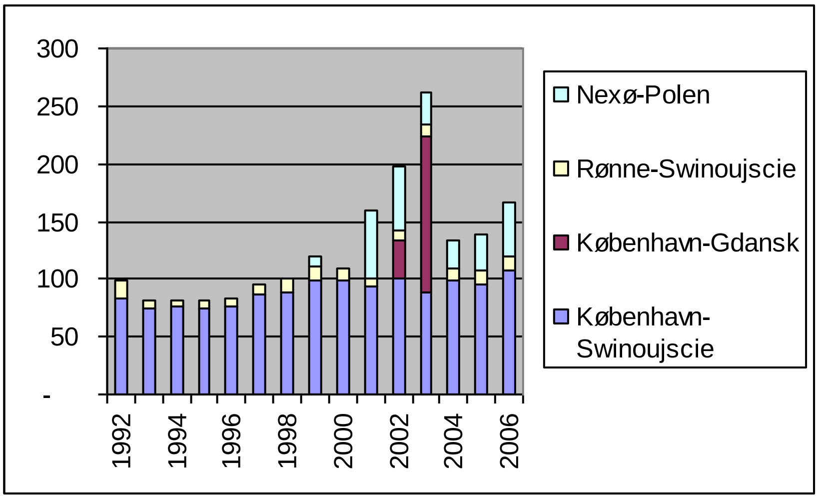
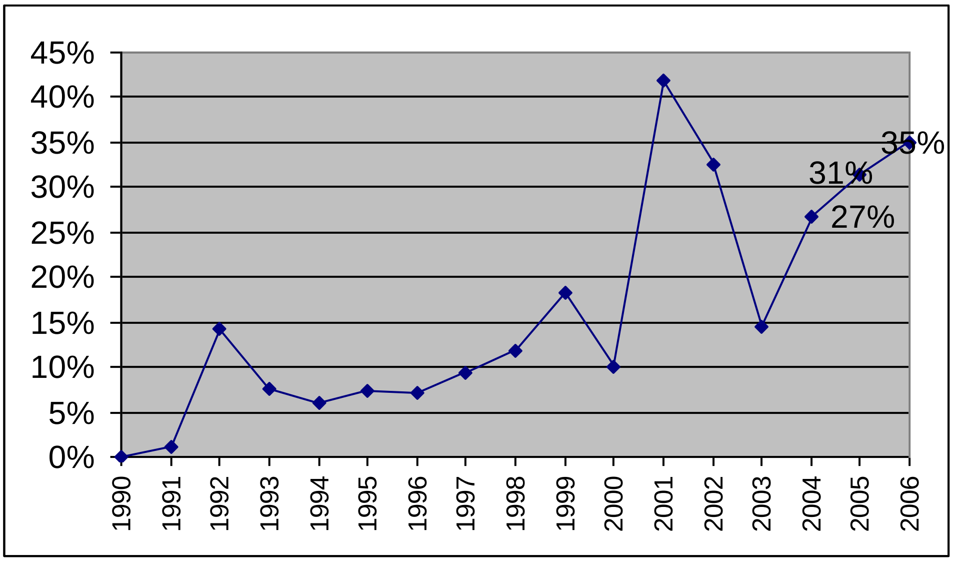


Figure 11 Bornholm's share of ferry passengers on routes between Poland and Denmark: 35% in 2006



[4] www.stat.gov.pl/cps/rde/xbcr/gus/PUBL_poland_quarterly_statistics_04_2006.pdf

Source: Based on data from Danmarks Statistik, Statistikbanken.dk

In 2003 the route Copenhagen-Gdansk ran for a full year and had many passengers, thus the drop in Bornholm's share in 2003. There were many excursionists (one day visitors) to Nexø in 2001 and 2002 when the sailings to Nexø were stepped up. Thus Bornholm's share of Denmark's sea passengers on the routes from/to Poland was particularly high in 2001 and 2002.

Figure 12 Passengers on the ferries from Poland to Bornholm by port, 1992-2006

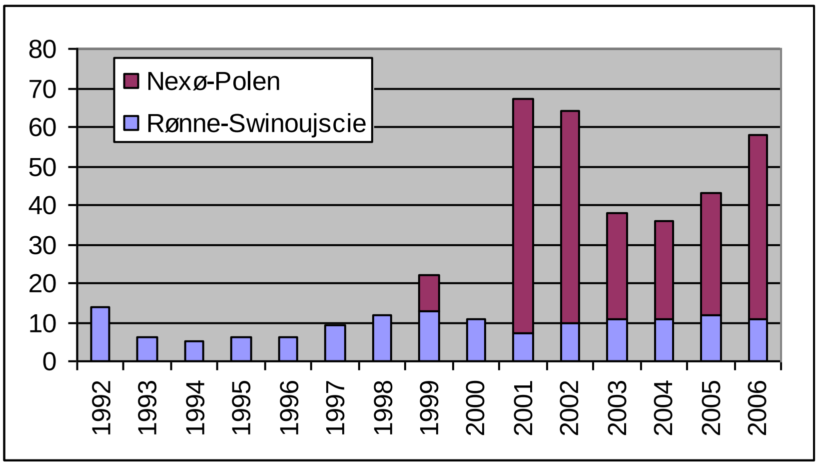


Figure 13 Passengers on the ferries from Poland to Bornholm by month and port, 2006

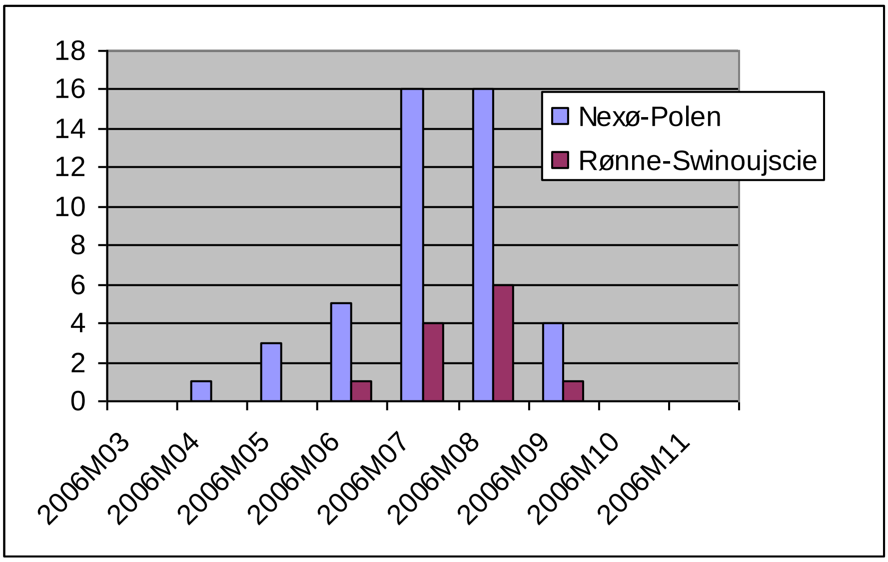
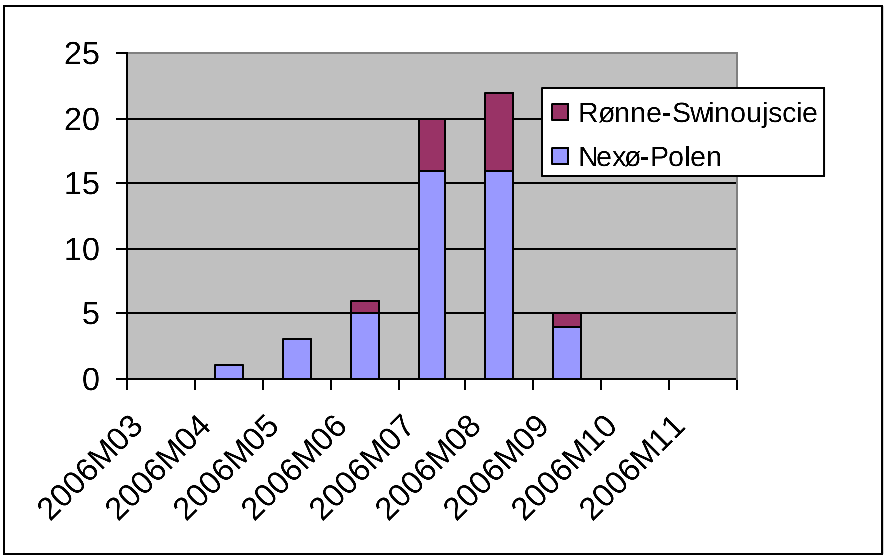


Figure 14 Passengers on the ferries from Poland to Bornholm by month and port, and total, 2006



Poland – Nexø

Table 6 Two percent more passengers to/from Nexø in 2007 by the end of August

Nexø	Passengers	Roundtrips	Source:
Full year 2006	47000	117	Danmarks Statistik
Per 31 August 2006	41832	104	Nexø Port 26 Sep. 07
Per 31 August 2007	42571	108	Nexø Port 26 Sep. 07
Change, per 31 Aug.	2%	4%	

Jantar – of KZP

Jantar of Kolobrzeska Zegluga Pasazerska, KZP, takes up to 260 passengers. Jantar carried 35.400 passengers to/from Bornholm in 2006 on 97 roundtrips. Jantar leaves Kolobrzeg at 07.00 in the morning and arrives in Nexø after 4½ hours at 11.30. Most of the passengers go on an excursion by bus around the island. Jantar leaves Nexø again at 18.00, arriving back in Kolobrzeg at 22.30. In summary, 9 hours spent on the ship and 6½ hours on Bornholm.

Lady Assa – of Zegluga

A second ship, Lady Assa, of a different company, Zegluga, takes up to 700 passengers and carried 11.200 passengers to/from Bornholm in 2006. Lady Assa sails to Nexø from Kolobrzeg or Darlowo. When Lady Assa sails from Kolobrzeg it leaves at 06.30 and arrives in Nexø 3½ hours later at 10.00. Then there is a 7 hour stay on Bornholm. The ferry leaves Nexø at 17.00 and is back in Kolobrzeg at 20.30. The sailing time from Darlowo is 15 minutes longer but the stay on Bornholm is also ½ hour longer. Sailings are not regular but the connections from Darlowo are on Wednesdays and Saturdays and the sailing period in 2007 was from 5th July to 31st August from Kolobrzeg and from 8th July to 29st August from Darlowo.[5]

[5] www.zegluga.pl/

Bornholm Express – of Christiansøfarten

A third ship, Bornholm Express, based on Bornholm, made two roundtrips in 2006 with about 360 passengers. In May 2007, Bornholm Express made several roundtrips, in September 2007 three roundtrips per week for three weeks, i.e. nine roundtrips. The sailings in the spring 2007 did not bring the number of passengers hoped for.[6] The sailings targeted the local market but apparently not many people living on Bornholm wanted to make tours to Poland. Sailings between Poland and Bornholm would probably have to be targeted the Polish market, i.e. Polish passengers with the sailing schedule reflecting this in order to bring satisfactory passenger numbers. Thus, sailings should be scheduled to suit the Polish tourists wanting to visit Bornholm and not the other way around.

Neko Seaways - A new car ferry?

For some time now, actually since 2003, plans have been underway to build a car ferry capable of taking 50 cars and up to 390 passengers between Poland and Bornholm. According to the foreword of the Business Plan of Neko Seaways dated 25th June 2007, starting capital had reached DKK 720.000 with an aim to reach DKK 1.5 million.[7] According to recent local news, "3 million DKK (EUR 400.000) is needed to get started with the project."[8]

Poland - Rønne

Pomerania – of Polferries

Polferries sailed 10 roundtrips in 2007 on Saturdays from 30th June to 1st September. This was one roundtrip less than in 2006 (with a total of 12.000 passengers in 2006) and back in 2005 there were 12 roundtrips to Rønne. The ferry leaves Świnoujście at 10.00, arrives 5 hours and 15 minutes later in Rønne, at 15.15. It leaves Rønne again at 17.30 and is back in Świnoujście at 22.45.

When the ferry M/F Pomerania that can take up to 1,000 passengers and 273 passenger cars or 26 lorries (or at least as many busses) sail between Świnoujście and Copenhagen, it has a special offer to busses: If there are at least 25 paying passengers in the bus, the bus itself is free. However, when the same ferry sails between Świnoujście and Rønne this offer does not apply. Secondly, when the Polferries ferry M/F Wawel sails between Świnoujście and Ystad busses are also transported for free when there are at least 25 paying passengers. Thirdly, when the Polferries ferry M/F Scandinavia sails between Gdansk and Nynäshamn busses are transported for free when there are at least 25 paying passengers. In light of this skewed price policy, it is easy to understand why there are hardly any busses from Poland to Bornholm on the route Świnoujście-Rønne. Thus it would be a good idea for Polferries to transport busses for free to Bornholm as well, since they would get more paying passengers. For Bornholm as a destination it would mean more Polish tourists coming to Bornholm and staying for a week if busses were transported for free on the route to Rønne as they are on the routes to Copenhagen and Ystad.

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[6] www.bornholm.nu, 25th may 2007, "Kun få med Polensejlads" (Only few passengers on tour from Bornholm to Poland) 14th April 2007: "Ture til Polen med rabat" (Trips to Poland with discount).
[7] Neko Seaways ApS, Business plan, http://biznes.koszalin.pl/file.php?fileName=1187963910_businessplan%2C_ORION.24042007.doc&orgFileName=Biznes+plan
[8] www.dr.dk, 27th Sept. 2007, "Nexø-Polen-færge får politisk støtte" (Nexø-Poland ferry gets political support).

In 2006 there was 1 (one) bus transported (i.e. one way, not return) on 11 roundtrips on the route Swinoujscie-Rønne. In comparison, there were 441 busses transported on 214 roundtrips, i.e. one bus per departure on other Polferries routes. So, Rønne is missing out on about 20 busses on the route Swinoujscie-Rønne, i.e. 10 bus-roundtrips. With 30 passengers per bus, staying for one week, Bornholm could get 30*10=300 additional guests from Poland per year, each staying seven nights, i.e. 2,100 additional bed nights. Since there were about 20,000 Polish bed nights on Bornholm in 2006 and about 10% more in 2007, i.e. 22,000, Bornholm could get about 10% more Polish bed nights if Polferries changed their price policy.

The offer of free transport of busses to Rønne could be restricted to months other than August (or second half of August), to ensure that the car deck is available for passenger cars rather than busses in the peak season. In August 2006 there were twice as many cars per departure on the route Swinoujscie-Rønne (114) as on the route Swinoujscie-Copenhagen (57). However, as the ferry takes up to 273 cars, it is clear that the ferry Swinoujscie-Rønne on average is less than half full even during August and only completely full during a couple of weekends in August. On the route Swinoujscie-Copenhagen, May and September are peak seasons for busses. Thus Polferries could extend their sailing period to Bornholm with a focus on busses in September. Alternatively Polferries could add a mid-week sailing, although a Wednesday sailing was not a success for Bornholmstrafikken when they tried it with a ship of the same size during the summer of 1998 and 1999. While the number of roundtrips on the route doubled in the years mentioned, the number of passengers did not.

Table 7 Ferry statistics, Swinoujscie-Copenhagen and Swinoujscie-Rønne, 1990-2006

Udenrigs færgetransport efter færgerute, enhed og tid

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
København-Swinoujscie																	
Dobbeltture	258	281	314	339	287	328	370	271	258	257	262	258	258	260	248	253	214
Passagerer, 1000	84	94	84	75	76	75	77	87	88	98	99	93	100	89	98	95	108
Personbiler	9900	12400	10199	7505	8215	8572	9118	10962	11607	11275	13028	12726	12482	11450	14191	16387	19332
Busser	200	100	168	203	313	348	410	424	391	429	438	331	400	330	333	393	441
Rønne-Swinoujscie																	
Dobbeltture	0	10	17	14	9	10	11	11	22	22	12	10	10	11	12	12	11
Passagerer, 1000	0	1	14	6	5	6	6	9	12	13	11	7	10	11	11	12	11
Personbiler	0	0	93	255	309	466	783	1262	1716	1865	1365	1289	1688	1627	1449	1659	1505
Busser	0	0	7	2	2	0	0	4	5	8	3	1	3	2	5	5	1

In 2007 Polferries took 10 roundtrips to Rønne. In 2006 it was 11 roundtrips and in 2005 and 2004 it was 12 roundtrips per season to Rønne. Thus another way to increase accessibility and number of passengers is to increase the number of roundtrips to the levels of 2004 and 2005.

Table 8 Ferry statistics, Swinoujscie-Copenhagen and Swinoujscie-Rønne, by month 2006

Udenrigs færgetransport efter færgerute, enhed og tid

	2006M01	2006M02	2006M03	2006M04	2006M05	2006M06	2006M07	2006M08	2006M09	2006M10	2006M11	2006M12	2006
København-Swinoujscie													
Dobbeltture	17	7	18	14	22	21	22	22	21	18	17	15	214
Passagerer, 1000	5	2	8	8	11	9	14	13	12	11	8	8	109
Personbiler	1252	521	1108	1299	1511	1649	2787	2517	1918	1930	1455	1385	19332
Busser	4		54	54	**73**	45	39	38	**75**	38	15	6	441
Busses per departure	0,1	0	1,5	1,9	1,7	1,1	0,9	0,9	**1,8**	1,1	0,4	0,2	1,03
Person cars per departure	36,8	37	31	46	34	39	63	57	46	54	43	46	45
Rønne-Swinoujscie													
Dobbeltture						1	5	4	1				11
Passagerer, 1000						1	4	6	1				12
Personbiler						39	493	915	58				1505
Busser								1					1
Busses per departure								0,1					0,05
Person cars per departure						20	49	114	29				68

Bornholmstrafikken – bus service from Stettin via Sassnitz

Bornholmstrafikken sailed 11 roundtrips on Wednesdays Rønne-Swinoujscie back in 1998 and 1999 but did not get the number of passengers hoped for. The crossing to Swinoujscie was possibly too long to attract one day visitors or the market on Bornholm for one day trips to Poland is simply too small.[9]

Since April 2007 it has been possible to travel by bus between Szczecin in Poland and Sassnitz in Germany on Saturdays where arrival is coordinated with the departures and arrivals of Bornholmstrafikken's ferry. From the middle of July, the bus route was also running on Wednesdays.[10] Thus, there is a possibility for people from Bornholm to get a prolonged weekend in Szczecin or people from Poland to stay 3 or 4 nights on Bornholm. The price for an adult going one-way Szczecin-Rønne was 254 kr., i.e. 508 kr. or 68 Euro for a return. There is a discount for children. In Szczecin tickets are sold by Biuro Podróży Interglobus Tour s.c.[11]

Apparently it is a minibus which serves the route Szczecin -Sassnitz (-Rønne). Single or return tickets with start in Szczecin or Rønne/Bornholm are available. For groups of at least 10 persons special prices are available.

[9] Cf. also the May and September sailings from Bornholm to Poland by BornholmExpress in 2007.
[10] www.bornholmstrafikken.dk/nyheder/76we.aspx?newsId=1596
[11] ul. Kolumba 1, www.interglobus.pl, biuro@interglobus.pl -- Bornholmbus: www.bornholm-bus.pl/

Air travel – from/to Poland, to/from Bornholm

Airports in Poland

"In 2006 there was still a high dynamics of the border traffic in airports, where 13.1 million persons were cleared, i.e. by 38.1% more than in the previous year (in 2005 there was an increase by 39.6%), of which at the Okęcie airport – 6.8 m (more by 15.5%). Clearances in the Okęcie airport accounted for 52.0% of border traffic in Polish airports. Although the share of that airport in the passenger service is a dominant one, attention should be paid to the rising significance of regional airports, in particular in Kraków Bielice. In 2006 the number of clearances in that airport amounted to 2.1 million (by 55.8% more than in the previous year), and the share thereof in airport clearances increased from 14.5% in 2005 to 16.3%. Also the number of clearances made in Katowice – Pyrzowice is going up (share in clearances – 10.4%). In 2006 the traffic in that airport increased up to 1.4 million, i.e. by 28.8% on the annual basis. However, the highest dynamics of border traffic was recorded in Gdańsk - Rębiechowo and Wrocław – Strachowice, where respectively 113.5% and 130.8% more persons were cleared than in 2005." [12]

Table 9 Number of international air passengers in regular air traffic to/from Poland by country 2006.

	2006	2006, %
United Kingdom	2.867.713	21%
Germany	2.322.519	17%
Italy	834.567	6%
Ireland	712.800	5%
France	679.363	5%
United States	485.888	4%
Greece	369.803	3%
Spain	368.885	3%
Sweden	338.392	**2,5%**
Denmark	322.702	**2,4%**
Netherlands	320.607	2%
Egypt	294.448	2%
Belgium	256.170	2%
Turkey	247.199	2%
Austria	217.061	2%
Tunesia	216.142	2%
Norway	206.729	**1,5%**
Switzerland	199.343	1%
Hungary	169.668	1%
Other	2.007.383	15%
	13.437.382	100%

[12] www.stat.gov.pl/cps/rde/xbcr/gus/PUBL_poland_quarterly_statistics_04_2006.pdf

The table shows the passengers of scheduled airlines on routes between Poland and other countries, domestic Polish traffic not included

(Source: www.stat.gov.pl/cps/rde/xbcr/gus/PUBL_transport_activity_results_in_2006.pdf p. 188.)

Table 10 Number of air routes in and from Poland, and length, 2004, 2005, 2006

Routes	2004	2005	2006	2004-6 %
National	8	10	10	25%
International	61	97	128	110%
Air routes	69	107	138	100%

Average km	2004	2005	2006	2004-6 %
National	286	276	276	-3%
International	1.468	1.485	1.622	10%
Air routes	1.331	1.372	1.524	14%

Length	2004	2005	2006	2004-6 %
National	2.291	2.764	2.764	21%
International	89.572	144.040	207.599	132%
Air routes	91.863	146.804	210.363	129%

Source: Source: Central Statistical Office: ”Transport – Activity Results in 2006”, www.stat.gov.pl

Table 11 Air passengers to/from Poland

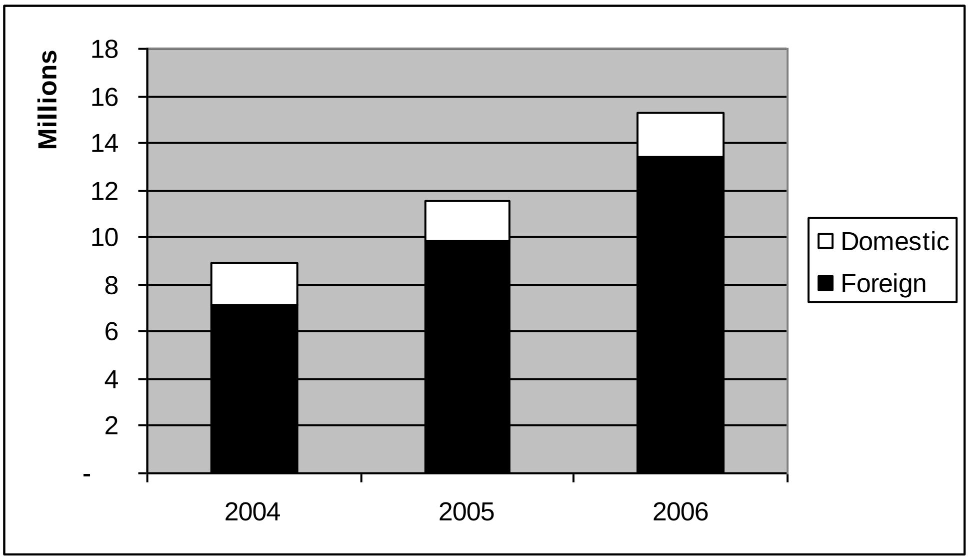
	Foreign	Domestic	Total
2004	7.097.347	1.783.213	8.880.560
2005	9.808.156	1.743.013	11.551.169
2006	13.437.382	1.881.443	15.318.825

2004-2005	38%	-2%	30%
2005-2006	37%	8%	33%

2004-2006	89%	6%	72%

Source: Source: Central Statistical Office: ”Transport – Activity Results in 2006”, www.stat.gov.pl

Figure 15 Air passengers to/from Poland



Source: Source: Central Statistical Office: "Transport – Activity Results in 2006", www.stat.gov.pl

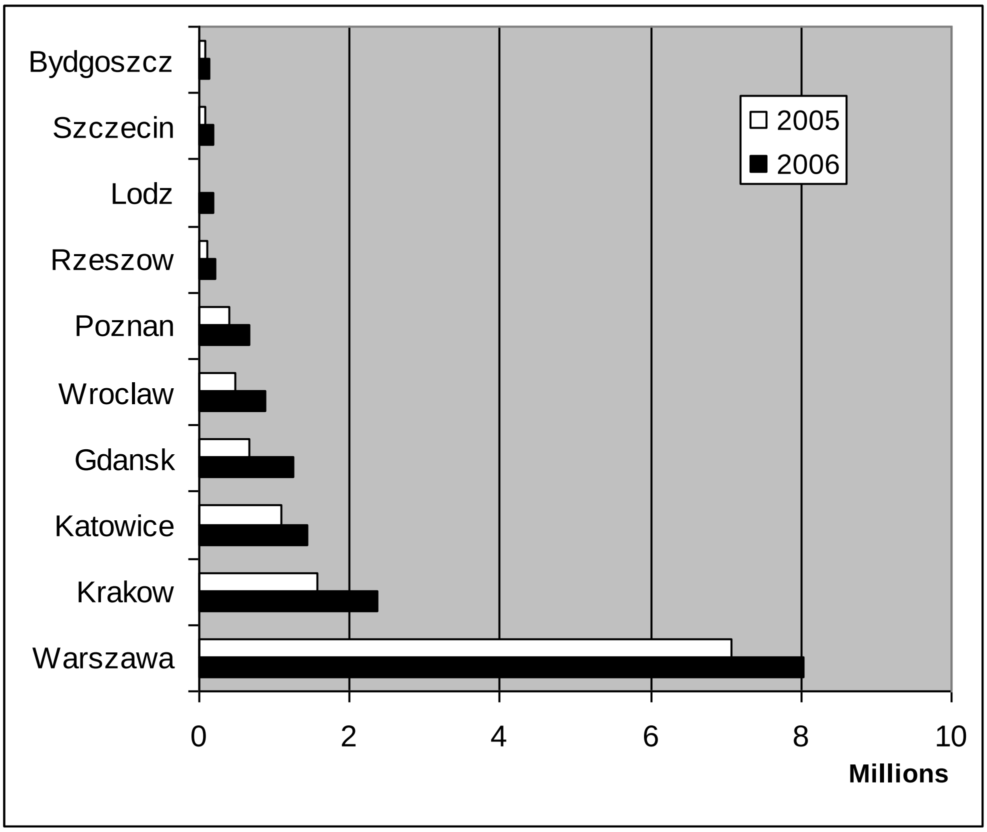
Figure 16 Airports in Poland

Source: www.lotnisko-chopina.pl/porty.php

Table 12 Passengers per airport in Poland, 2005, 2006

Airport	2005	2006	Increase	Increase %
Warszawa	7.071.881	8.031.729	959.848	14%
Krakow	1.568.838	2.353.813	784.975	50%
Katowice	1.083.209	1.445.641	362.432	33%
Gdansk	667.893	1.249.753	581.860	87%
Wroclaw	465.528	865.934	400.406	86%
Poznan	398.093	651.827	253.734	64%
Rzeszow	93.968	208.102	114.134	121%
Lodz	18.063	189.580	171.517	950%
Szczecin	68.399	180.182	111.783	163%
Bydgoszcz	76.910	133.662	56.752	74%
Zielona Gora	957	8.602	7.645	799%
Szymany	332	-	(332)	-100%
Total	11.514.071	15.318.825	3.804.754	33%

Figure 17 Passengers per airport in Poland, 2005, 2006



Warsaw

Warsaw Frederic Chopin Airport [13]

Welcome to Warsaw Frederic Chopin Airport, the biggest and most modern facility of its kind in Poland.

Warsaw Airport handles more than 50% of the overall air passenger traffic in the country. Departing aircrafts carry passengers to various countries in America, Africa, Asia and Europe.

At present, Warsaw Airport operates provides approximately 100 scheduled flights to/from major airports in Poland and worldwide and the number of its charter connections is always increasing. Passengers' favourite destinations are London, Frankfurt, Paris and Amsterdam. In terms of domestic traffic, most passengers travel to Krakow, Wrocław and Gdańsk.

In the last few years, the passenger traffic has been growing steadily. In 2006, Warsaw Airport served over 8 m passengers. In comparison to the previous year, the total number of passengers grew by more than fourteen percent.

Warsaw Airport is located 10km south-west of the city centre. It is situated on more than 500 hectares. Air operations are served by two runways of the following dimensions: 3690m x 60m and 2800m x 50m. Aircrafts move on 21 taxiways. Warsaw Frederic Chopin Airport has a capacity of 34 air operations per hour.

In Terminal 1, there are 46 check-in desks. Passengers and their baggage are checked-in by the ground personnel of two companies, i.e. LOT Ground Services oraz Warsaw Airport

[13] www.lotnisko-chopina.pl

Services. Some airlines carry out their own passenger check-in. - Terminal 1 is open 24 hours a day.

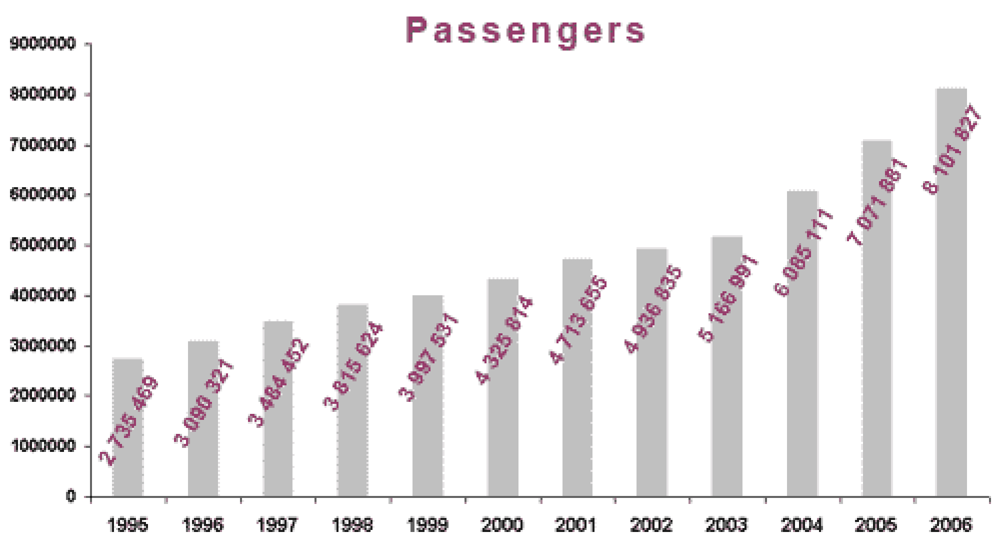
Etiuda Terminal:

At the end of March 2004, Warsaw Frederic Chopin Airport opened a new passenger terminal named "Etiuda". It is situated in the southern part of the airport, behind the exit from the fly-over access road. The Etiuda terminal serves DEPARTING passengers only. -- At present, The Etiuda Terminal serves passengers of air italy, easyJet, Germanwings, Norwegian Air Shuttle, Ryanair, SkyEurope, Wizz Air and a part of Centralwings flights.

Terminal 2:

Construction works on the new Terminal 2 began in May 2004. The infrastructure of the new terminal is specifically designed to meet current and future passenger and airline needs by providing state-of-the-art services and facilities. The new facility will be capable of handling 6.5 million passengers per annum and when combined with Terminal 1 that will give Warsaw F. Chopin Airport the capacity of about 10-12 million passengers per year. According to the contractor's declarations the whole project will be completed by November 2007.

Figure 18 Passengers from/to Warsaw Airport



Source: Warsaw Airport, www.lotnisko-chopina.pl/katalog/statystyki/en/statystyki.php

Of the 33 airlines, which are mentioned on Warsaw Airport's home page, the following have airplanes stationed at the airport: Centralwings, Norwegian.no, LOT / EuroLOT.

There are two different terminals at Warsaw Airport, the original one, plus a separate one with more limited facilities to the low cost airlines. Prices of the different services are 40 or 50% lower in the low cost terminal than in the original terminal.

Table 13 Selected prices in WAW for Terminal 1 and "Etiuda" Terminals, respectively

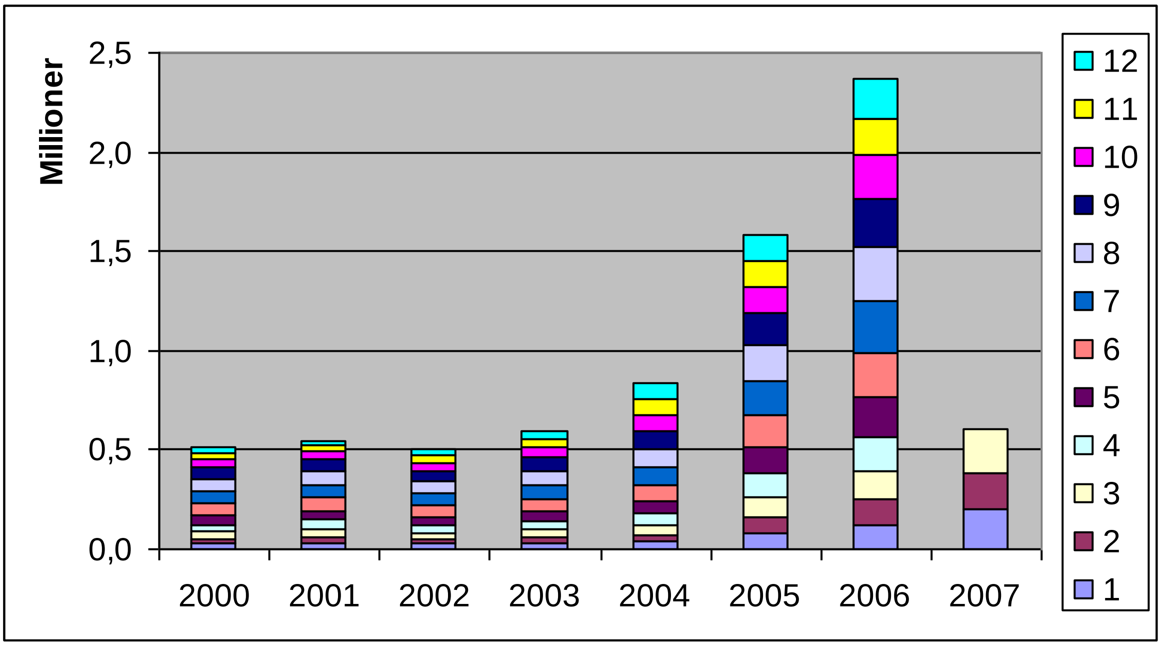
Charge for the use of centralized infrastructure	Calculation criteria	Net Price
Check-in desks in Terminal 1	departing passenger	0.28 PLN
Check-in desks in 'Etiuda' Terminal	departing passenger	0.15 PLN
Sorting baggage area in Terminal 1	departing passenger	1.00 PLN
Sorting baggage area in 'Etiuda' Terminal	departing passenger	0.60 PLN

Source: www.lotnisko-chopina.pl/katalog/oplaty/en/pliki/2007_07/infrastructure_charges.pdf

Krakow

There were 2.4 million passengers from/to Krakow Airport in 2006. During the period 2000 to 2003 there were only between 0.5 and 0.6 million passengers per year. During the first three months of 2007 there were 55% more passengers from/to Krakow Airport than during the same period in 2006. Krakow Airport is the second largest in Poland.

Figure19 Development in the number of passengers from/to Krakow Airport

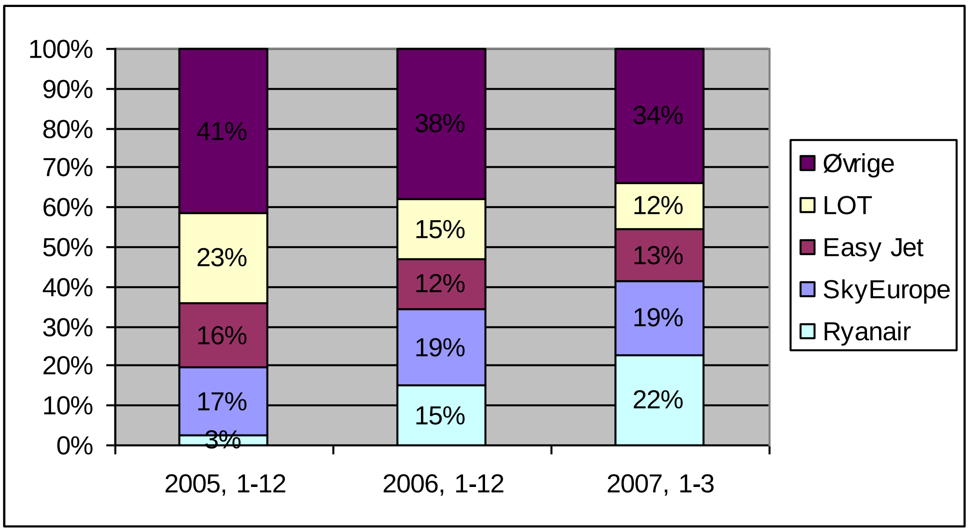


Source: Website of Krakow Airport.

"John Paul II Kraków-Balice International Airport's activity covers directly approximately 7.9 million inhabitants in the radius of 100 km from Kraków, which is the equivalent of approximately a 90-minute drive from the airport. This is a world standard in the evaluation of the potential passenger market by airlines to use an airport. To compare, similar areas of Polish airports' coverage are as follows: Warsaw - 6.4 million, Poznań - 4.2 million, Gdańsk - 3.0 million, Rzeszów - 2.6 million and Szczecin - 1.4 million inhabitants."[14]

Krakow airport even state the different airlines' share of passengers. In the first quarter of 2007 Ryanair took over the first place at Krakow Airport by number of passengers, with SkyEurope in second place, easyJet number 3, and LOT now in 4th place, after LOT was number one in 2005, and SkyEurope was number one in Krakow in 2006.

Figure20 Share of passengers per airline at Krakow Airport, 2005, 2006, 1. quarter 2007



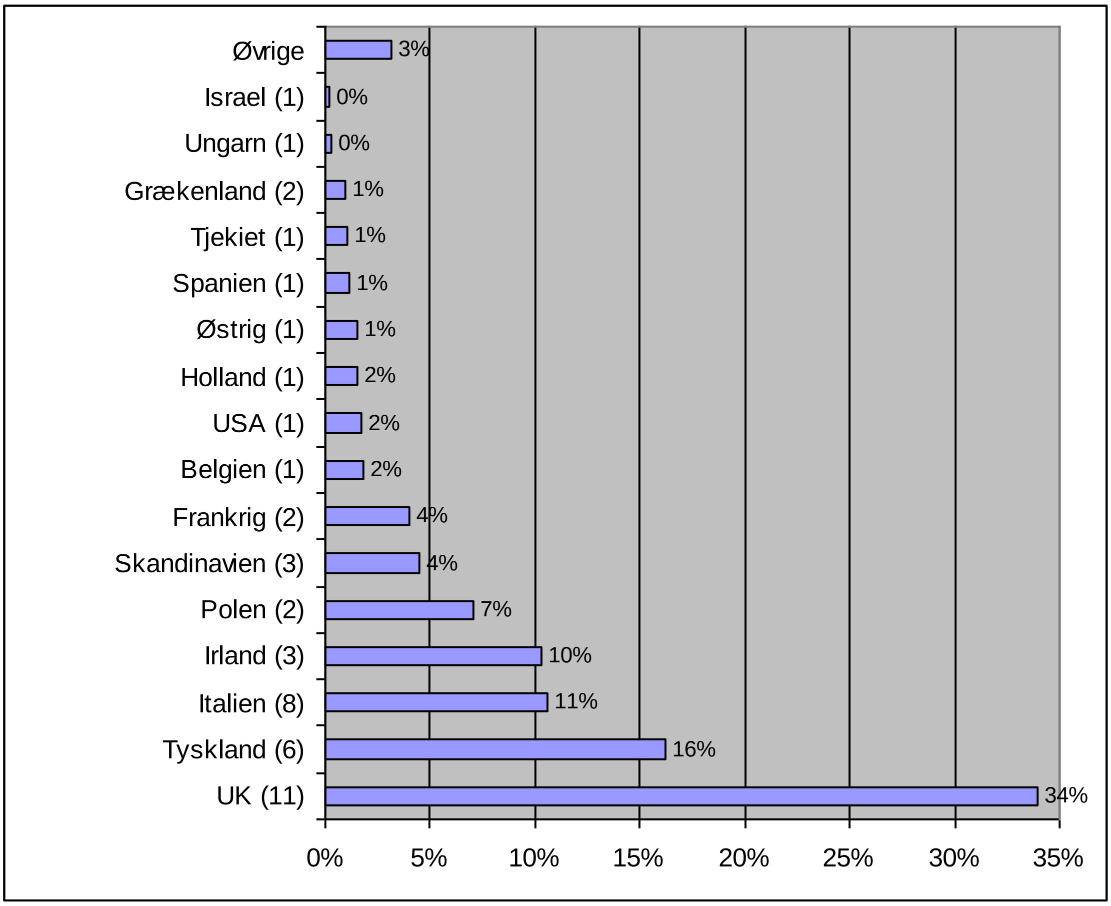
Source: Based on numbers from the website of Krakow Airport.

When it comes to Krakow, SkyEurope has a relatively strong position even though they have lost 1st place to Ryanair. However, SkyEurope is withdrawing from most of their routes from Krakow by the end of 2007.

One cannot say that Scandinavia is the big hit at the moment from/to Krakow Airport. During Q1.2007 the airports in the 3 Scandinavian capitals accounted for just 4% of the passengers, of which Kastrup one fourth, 1%. SAS had 0.4% of the passengers in Krakow Airport in 2005, 0.0% in 2006 and 0.0% in Q1.2007. Of the 45 largest destination airports from Krakow 11 British airport accounted for 34%, and 6 German for 16%, i.e. half in total.

[14] Krakow Airport's website.

Figure21 Share of passengers by country for passengers between Krakow and 45 other airports



While SAS apparently stopped flights to/from Krakow in 2006, apparently Sterling started a route from Copenhagen to Krakow on 19th September 2006, flying three times a week.[15]

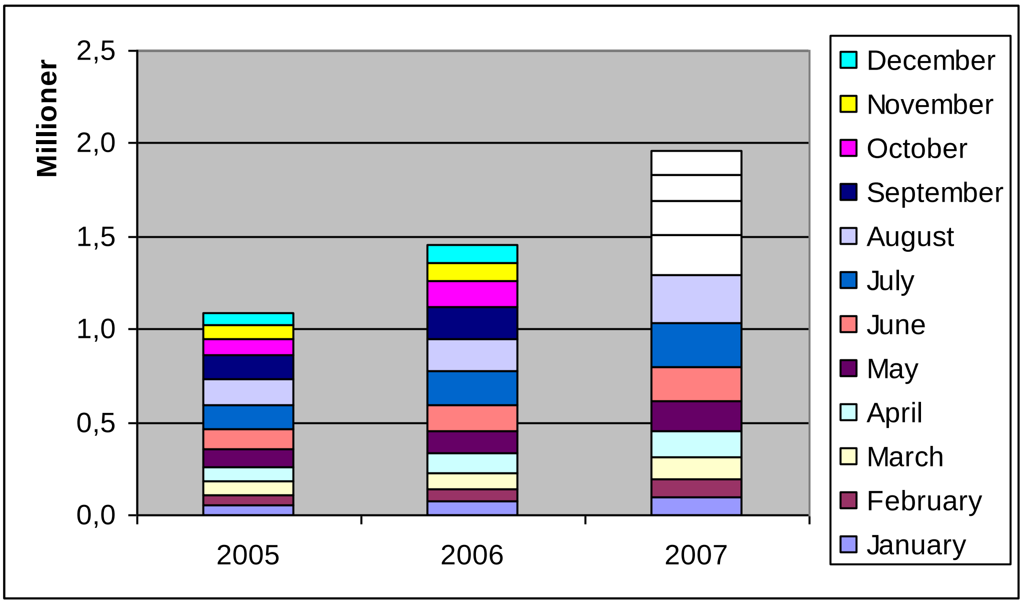
It seems like where one airline moves out; another immediately considers the possibility of moving in. Thus there is every reason to keep an eye on announcements of closing as well as opening of new routes.

Katowice

The number of passengers to/from Katowice increased by 34% from 2005 to 2006 and after the first 8 months of 2007, it looks like der af 2007 there will be a further increase of 35% from 2006 to 2007. There were 1.1 million passengers in 2005, about 1.5 milliion in 2006 and there will be about 2 million in 2007.

[15] www.federacja-polonia.dk/dk/nyheder.html

Figure 22 Number of passengers to/from Katowice Airport, 2005, 2006, 2007 (est.)



The plans of Katowice shows that Wizzair has departures to 23 different foreign destinations while LOT / EuroLOT primarily has domestic departures to Warszawa (small planes) and München and Torino. Lufthansa has flights to/from Frankfurt and Düsseldorf. Finally Centralwings has two routes to Ireland. Thus Wizzair dominates the picture in Katowice.

From Katowice Airport scheduled flights go to the north and west, a few south, whereas charter flights to south. Scheduled carriers serving Krakow include: LOT Polish Airlines/EuroLOT, Lufthansa, Wizz Air, and Centralwings.

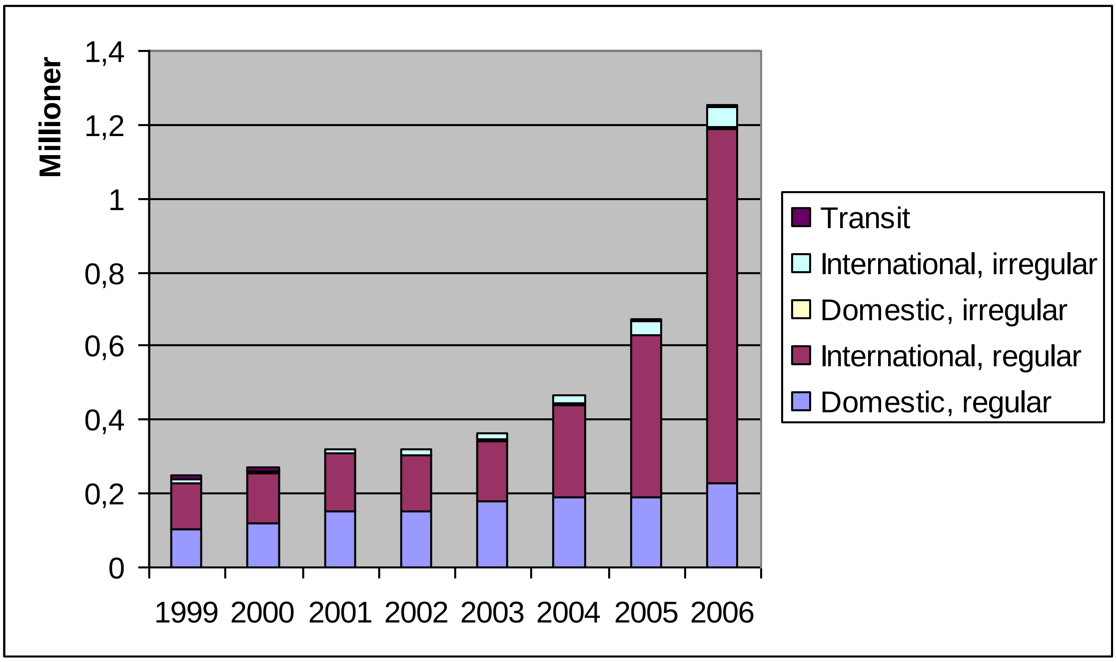
There are far more airlines in Katowice than those mentionned above. Actually there are 39 airlines - scheduled, charter, cargo – Polish and foreign.[16]

The Polish ones are: LOT Polish Airlines/EuroLOT, Lufthansa, Wizz Air, Centralwings; Prima Charter, White Eagle; and Sky Express which only flies freight.

[16] www.katowice-airport.com/eng/index.html?page=linie_lotnicze

Gdansk

Figure 23 Development in the number of passengers from/to Gdansk Airport



Source: www.airport.gdansk.pl/

The growth in Gdansk Airport seems to continue: The number of passengers in the first half of 2007 was more than 40% of the number in the same period in 2006.

Among the latest news from Gdansk should be mentionned:

2007-08-27: Blekinge Flyg starts new route from Gdańsk Lech Walesa Airport to Ronneby. Book tickets at www.blekingeflyg.se.

2007-08-21: More flights to Copenhagen. Starting from 3rd September SAS will change number of flights from Gdansk Lech Walesa Airport to Copenhagen.

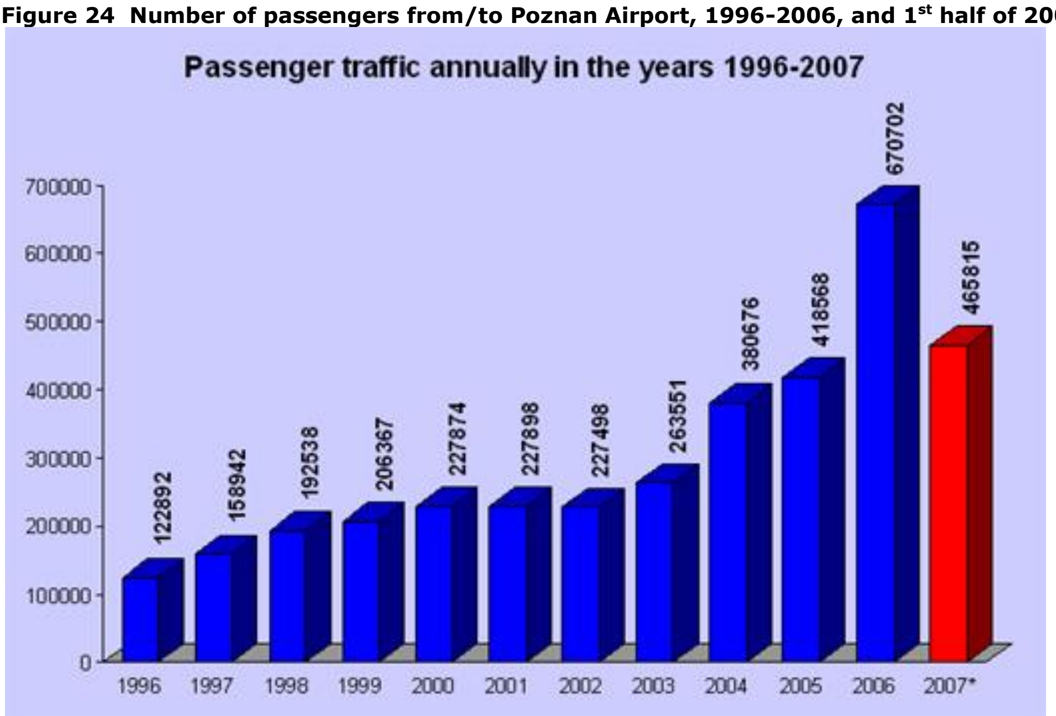
2007-08-16: More Dublin!!! -- For Autumn 2007 Ryanair, Europe's largest low fares airline announced increase frequency of flights to Dublin. Thanks new flight weekly frequencies on this route will be increased by 2 a week to 3.

2007-08-14: From Gdansk to Belfast. -- Starting from 30.10.2007 easyJet will start new route from Gdansk Lech Walesa Airport to Belfast.

Poznan

Wizzair starts a new base in Poznan from 31 January 2008. There will be routes to Doncaster/Sheffield, Prestwick/Glasgow, Malmo/Copenhagen and Oslo Torp. Bornholm is on the line Poznan – Oslo Sandefjord/Torp. Sandefjord/Torp lies about 120 km south of Oslo in Vestfold.

Figure 24 Number of passengers from/to Poznan Airport, 1996-2006, and 1st half of 2007



The number of passengers in Poznan grew significantly from 2005 to 2006 and it looks like it will grow even more in 2007.

September 2005 Wizzair opened a route to London Luton with five weekly departures. The same month Ryanair opened a route to London Stansted with a daily departure. Subsequently both airlines have opened new routes to/from Poznan.

Stettin / Szcecin

From Stettin there are flights to Warsaw (LOT, mainly ATR, 4 times per day, 6 or 7 days per week), Oslo (Norwegian, B737, twice a week), Dublin (Centralwings, B737, 4 times per week) and London Stansted (Ryanair, B737, four times per week). – Furthermore there are charter flights to Turkey, Tunesia and Egypt.

Since Stettin is located fairly close to the sea ports Sassnitz, Swinjoucie and Kolobrzeg, and since there is even a bus connection from Stettin connecting to the ferry of BornholmsTrafikken, Stettin is in too direct competition with the ferries in order for a summer route to Bornholm to be feasible.

Anyway, is there any small/medium plane from LOT stationed in Stettin Saturdays or Sundays, apparently idle? No, there is not. But there is a LOT plane in Warsaw on Saturday afternoon, when it does not fly to Stettin. So, when LOT does not fly the usual roundtrip WAW-Stettin, the airplane could fly a round WAW-Bornholm in stead, between 13.40 (dept. WAW) and 16.55 (arr. WAW). Flying time is 90 minutes, turnaround time in Stettin 25 minutes. The distance and flying time WAW-Bornholm is like WAW-Berlin, (95 or) 100 minutes by an ATR, so a bit of time would be missing, so a bit of adaptations would be needed. See section about LOT / euroLOT.

Table 14 Warsaw-Szcecin by LOT: One plane is in Warsaw on Saturday afternoon, when it does not fly

From Warsaw to

→ **Szczecin** SZZ + 0200

Xe7	0725	–0855	LO3931(K2)	ATR	0
Xe6	1340	–1510	LO3933(K2)	ATR	0
Xe24	1635	–1805	LO3935(K2) 01Jul–03Sep	ATR	0
Xe4	1635	–1805	LO3935(K2) 04Sep–27Oct	ATR	0
4	1710	–1840	LO3935(K2)	ATR	0
X	2220	–2330	LO3939	ER4	0

From Szczecin to

→ **Warszawa** WAW + 0200

Xe7	0555	–0700	LO3940	ER4	0
X	0920	–1040	LO3932(K2)	ATR	0
Xe6	1535	–1655	LO3934(K2)	ATR	0
Xe24	1830	–1950	LO3936(K2) 01Jul–03Sep	ATR	0

Wroclaw

Cimber Air has a route Copenhagen-Wroclaw, with through tickets to Bornholm. See section about Cimber.

Airlines

Out of the 15 largest airlines measured in number of passengers in 2006 and 1. quarter 2007, eight were lowcost airlines (LCCs): 2. Ryanair, 3. Wizzair, 4. Centralwings, 6. Skyeurope, 7. easyJet, 8. Norwegian Air Shuttle, 11. Aer Lingus and 14. Germanwings (the number indicates the rank).

The other airlines in the top 15 in Q1.2007 are: 1. LOT, 5. Lufthansa, 9. British Airways, 10. Air France, 12. SAS, 13. Alitalia and 15. KLM.

The share of the LCCs measured in passengers to/from Poland grew from 31.4% in 2005 to 46.2% in 2006 og 48.5% in Q1.2007.

LOT’s share of passangers fell from 43.8% in 2005 to 33.6% in 2006 and 32.6% in Q1.2007. The other Polish airlines were in Q1.2007 Centralwings (a subsidiary of LOT), Directfly and Skyexpress. These local airlines had all together a share of 48.6% i 2005, 41.3% i 2006 and 38.4% in Q1.2007. Directfly, a subsidiary of Skyexpress suspended flights on 7 May 2007.

See enclosure, “Passenger transportation in regular air traffic according to actual airlines in 2006.”

Out of the 10 largest airlines in Poland, 7 are lowcost carriers: Wizzair, Ryanair (Ireland), Centralwings (Poland), SkyEurope (Slovakia), easyJet (UK), Germanwings (Germany) and Norwegian Air Shuttle (Norway).[17]

LOT is without doubt the largest traditionel airline in Poland. Lufthansa si no. 5. Other large traditionel airlines in Poland includes British Airways, SAS and KLM, the latter two presumably outside of the top 10.

[17] Warsawvoice.pl, Soaring Market, 4. okt. 2006.

Norwegian

The Norwegian lowcost carrier Norwegian has a total of 96 routes to 60 destinations including some to/from Poland:

Warszawa: Copenhagen, Oslo, Oslo-Rygge, Stockholm Arlanda, München, Salzburg, Rom-Fi., Athens, Alicante, Malaga.

Gdansk: Oslo.

Krakow: Oslo, Stockholm Arlanda.

Szczecin: Oslo, Oslo-Rygge.

Oslo Moss/Rygge Lufthavn does not open until 1 Oktober 2007. Thus some of the routes mentionned above must be in the planning stage.

Norwegian opened 8 routes to/from Poland in September 2006 while four others to/from Poland were opened in July 2006 (PR, 22 June 2006). There are however, several of the 12 routes of 2006 that do not exist in 2007:Æ Warszawa-Milano, WAW-Dublin, WAW-Girona/Barcelona og WAW-Nice as well as Wroclaw-Stockholm og Wroclaw-Oslo.

Oslo, 22. juni 2006. Norwegian utvider med flere ruter fra Polen

Norwegian lanserer i dag åtte nye ruter fra Polen. Det opprettes nye flygninger mellom Warszawa og Stockholm, Roma, Milano, Dublin og Aten. I tillegg blir det nye ruter fra Wroclaw til Stockholm og Oslo samt fra Krakow til Stockholm. De nye rutene vil starte fra og med 14. september. Disse rutene vil komme i tillegg til de rutene som tidligere er annonsert og som starter 13. juli – Warszawa til Alicante, Malaga, Girona/Barcelona og Nice. – Selv om en rute startes om, er det altså langt fra nogen

Administrerende direktør i Norwegian, Bjørn Kjos, sa på dagens pressekonferanse i Warszawa, - Vi er veldig godt fornøyd med responsen i det polske markedet så langt, og derfor øker vi vår tilstedeværelse med disse åtte nye rutene. Vi har stor tro på at de nye rutene fra Warszawa og andre polske byer vil bli godt mottatt.

Billettsalget starter 23. juni kl. 14.00 med priser fra NOK 196 inkludert skatter og avgifter.

Fornebu, 25. februar 2005

Nye ruter:

Norwegian flyr lavpris til Polen

Norwegian satser på Polen med to nye ruter Oslo-Krakow fra 14. april og Oslo-Warszawa fra 15. april. – Polske destinasjoner trenger et lavprisselskap som Norwegian og vi har store forventninger til disse rutene både fra Norge og fra Polen, sier adm. direktør Bjørn Kjos.

Oslo-Krakow – to ukentlige avganger – torsdager og søndager. Midtsommer flys ruten onsdager og søndager.

Oslo-Waszawa – tre ukentlige avganger – mandager, onsdager og fredager.

- Med den trafikkstrømmen som har utviklet seg mellom Norge og Polen, er det på høy tid at med økt konkurranse i dette markedet både på frekvens og ikke minst på pris. Med en frapris på kr 396,- en vei inkludert skatter og avgifter, har vi virkelig tro på disse to nye rutene, sier Kjos.

Med utvidelsene til Polen vil Norwegian tilby totalt 43 ruter i 2005 – ni innenlands og 34 utenlands.

Norwegian åpner Oslo – Szczecin og Stavanger – Warszawa
- Største selskap mellom Skandinavia og Polen

Norwegian lanserer i dag to nye ruter fra Norge til Polen. De nye rutene er fra Oslo til Szczecin og fra Stavanger til Warszawa.

- Med dette forsterker vi vår posisjon på markedet mellom Polen og Skandinavia, hvor vi nå er den klart største aktøren med 80 ukentlige flygninger på 9 ruter, sier rutedirektør i Norwegian, Daniel Skjeldam.

- Vi gleder oss også over å knytte Stavanger til vår sterkt voksende base i Warszawa, samt ytterligere å øke tilgjengeligheten mellom Norge og Polen ved å lansere Szczecin som vår fjerde destinasjon i Polen, sier Skjeldam.

Szczecin er på størrelse med Oslo og har stolte tradisjoner innen fiske og skipsbygging, i tillegg har byen et stort antall parker og grønt arealer. Rutene Oslo – Szczecin og Stavanger - Warszawa vil gå to ganger i uken, henholdsvis tirsdag/lørdag og onsdag/ lørdag.

Rutetabell:

Oslo - Szczecin (fra 30.okt)			Stavanger - Warszawa (fra 31.okt)		
	Tirsdag	Lørdag		Onsdag	Lørdag
Oslo	12:25	07:50	Stavanger	09:35	18:05
Szczecin	14:00	09:25	Warszawa	11:40	20:15
Szczecin	14:25	09:50	Warszawa	12:10	20:45
Oslo	16:00	11:25	Stavanger	14:20	22:55

Prisene starter på 299 kroner, inkludert skatter og avgifter, og rutene vil ligge i salg fra og med i dag klokken 12.

Norwegian tilbyr totalt 96 ruter til 60 destinasjoner – 10 ruter innenlands og 86 ruter utenlands.

On the Polish website of Norwegian the following routes and prices are listed: Warszawa-Copenhagen for 229 zł/NOK 466/DKK 433, incl. taxes etc. The other direction Copenhagen-Warszawa return is available at similar low prices.

Warszawa- Birmingham 104zł, Warszawa – Rom 104zł, Warszawa – Stockholm 104zł, Warszawa – Athens 200zł, Warszawa - Copenhagen 104zł, Warszawa - Bergen 104zł, Warszawa – Oslo 104zł, Warszawa – München 101zł, Warszawa – Stavanger 104zł, Warszawa – Salzburg 200zł, Warszawa - Alicante 298zł, Warszawa - Malaga 298zł, Gdańsk – Oslo 92zł, Kraków – Oslo 93zł, Kraków – Stockholm 93zł, Szczecin – Oslo 73zł (1 zlotty is about 2 DKK (1,96)).

The route Copenhagen-Warszawa was opened on 29 October 2006 and has four weekly departures: on Mondays, Wednesdays, Fridays and Saturdays.

SkyEurope

About SkyEurope: "SkyEurope is the first premium low-cost low-fare airline in Central and Eastern Europe. We offer connections to the main European airports with punctuality, dependability and comfort provided by one of the youngest fleets in Europe. Our fleet consists of 14 brand new Boeing 737-700NG aircraft and over the past 12 months we have carried more than 3 million customers. By 2011, SkyEurope's fleet shall grow to 32 new Boeing 737-700 Next Generation aircraft."

Centralwings – low cost subsidiary of LOT

Nowy Przewoźnik Sp. z o.o. (Centralwings),

ul. 17 Stycznia 39,

00-906 Warsaw

Poland

+48 22 606 68 XX

Centralwings flies from 8 Polish cities mainly to the British Isles, but also France, Spain, Portugal, Italy, Greece, Bulgaria: "Centralwings fly to the main European airports and (in the summer) to the destinations where other low cost airlines do not."[18]

– The shortest flights from Warsaw are about 3 times as long as a possible flight from Warsaw to Bornholm. – Centralwings uses 9 planes from the LOT fleet, i.e. two different types of Boing 737, of which 3 Boing 737-300 for 145 passengers and 6 Boing 737-400 for 162 passengers.

Centralwings has 22 routes from Warsaw, 5 from Krakow, 5 from Katowice, 4 from Wroclaw, 4 from Poznan, 4 from Gdansk, 2 from Lodz, 1 from Stettin. For example in August 2007, there were up to 6 departures per day by Centralwings from Warsaw: Monday, Friday, Saturday 6 departures, Tuesday 5, Thursday 4, Wednesday 3, Sunday 2. – The two Sunday departures are to Mallorca and Lisbon. Although there are only two departures on Sundays, this does not mean that there is a plane standing in the airport most of the day, but the 06.45 plane to Mallorca is not back in Warsaw until late in the evening, 21.40. In the meantime the plane makes a roundtrip to Katowice. The Lisbon plane leaves Warsaw at 21.45, and is not back in Warsaw until Monday morning. So, there might be an idle Centralwings plane in Warsaw during the day on Sundays.

The easiest thing to do would perhaps be just to look in the airport during the weekend in Warsaw to see which planes are there.

Centralwings makes strong move into Krakow as Sky Europe resigns [19]

In Krakow, Centralwings wants to acquire part of routes and a base that Sky Europe is withdrawing from. Starting in November, Sky Europe will offer only Krakow-Vienna flights. Yesterday, Waldemar Krolikowski, Centralwings CEO and Kamil Kaminski, CEO of the Krakow airport Balice, signed a letter of intent.

Centralwings is not the only carrier interested in having its base in Balice. Norwegian Airlines is also negotiating the same option. Bjorn Kjos, Norwegian CEO, met Balice management last week to discuss the case.

"No decisions have been made yet because we don't have the airplanes. It's possible however that next year the situation will change", Kjos said. Kaminski believes that the airport's potential is big enough for other bases for other carriers.

One of the effects of the agreement signed between Balice and Centralwings is that four new routes from Krakow will be offered: to Dublin, Manchester, Girona (near Barcelona) and Athens. Centralwings will employ over 70 people at the base.

The low-cost carrier plans to launch further routes in the summer, possibly to points east. Centralwings management has also decided to shift the headquarters from Lodz to Warsaw.

Source: Puls Biznesu 2007-09-09

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[18] www.centralwings.com.
[19] www.polandbusinessnetwork.pl/news/index.php?contentid=147163

[July 23, 2007] Airline Sues Ex-Board [20]

(Polish News Bulletin Via Thomson Dialog NewsEdge) Centralwings, the budget airline owned by LOT, is awaiting new changes. The board, selected two months ago, has announced plans to modify and increase its number of connections, and to lease three planes next year. "The company has gathered speed but it needs some orderliness and further development. Its capital has been raised recently," said Waldemar Krolikowski, the company's CEO. He also said that upon joining the company, he encountered obstacles when he tried to find out about the company's financial situation. "The audit which we've ordered is to show the condition of the company at the moment of the new board's entry," he added. The report is to be ready in a few months. Meanwhile, the Public Prosecutor's Office has been notified about irregularities revealed by the audit. "We do not accuse anyone personally," said Krolikowski. He emphasised, however, that the former board did not receive a vote of acceptance by the supervisory board, which means that it was assessed negatively.

LOT – and EuroLOT

EuroLOT S.A., a wholly owned subsidiary of Polskie Linie Lotnicze LOT S.A., is an operator providing air transport services mainly for LOT. It flies to domestic and international regional airports. Its ATR72 and ATR42 aircraft make total approximately 29,000 flights per year carrying 1,000,000 passengers. In-flight services are rendered by EuroLOT's own personnel.

Apart from providing air links between 20 domestic and international airports, EuroLOT is also a provider of commuter flights for international air operations, being an important part of Warsaw Okęcie hub.

EuroLOT's fleet is comprised of 14 short-range turboprop airliners: six 44/46-seat ATR42-500s and eight 64-seat ATR72-202s. They have an optimum operational range of 1,200 km with a full complement of passengers, and a maximum range of approximately 2500 km.

Charter flights by EuroLOT:

Aviation services provided by EuroLOT include charter flights. These are mainly so-called ad-hoc flights for organized groups. The offer includes flights from all domestic and international airports at which EuroLOT aircraft are allowed to land. This offer is aimed at groups of up to 64 passengers.

This form of air transport is well suited to all kinds of business or recreational events such as e.g.: integration camps, picnics, conferences, business trips, music band and sports club tours and so on. Air transport guarantees speed and in the case of EuroLOT it is provided at competitive prices.

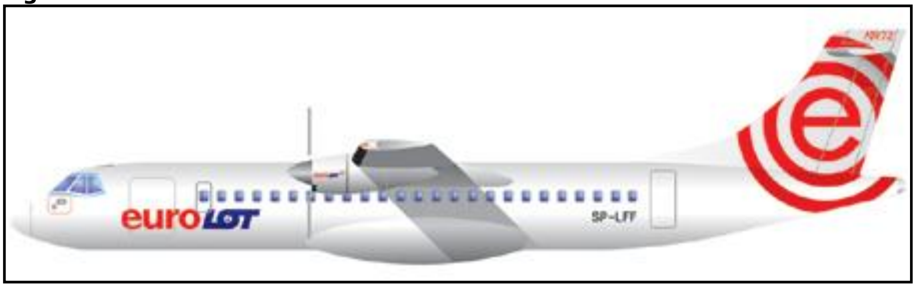
As part of EuroLOT's charter flight operations, its aircraft have already been flying to Ibiza, Corfu, Malta, Aalesund, Barcelona, Belgrade, Berlin, Braunschweig, Bremen, Budapest, Chisinau, Copenhagen, Frankfurt, Goteborg, Hamburg, Hannover, Haugesund, Helsinki, Heringsdorf, Kiev, Klagenfurt, Köln, Lviv, Malmö, Milan, Minsk, Mönchengladbach, Munich, Münster, Nice, Prague, St. Petersburg, Riga, Rome, Sofia, Split, Simferopol, Stavanger, Trondheim, Vienna, Zaporizhya and the majority of domestic airports.

[20] http://www.tmcnet.com/usubmit/2007/07/23/2805744.htm

Figure 25 ATR-42-500 - Number- 5

Source: www.lot.com.

Figure 26 ATR – 72 - Number- 8



Source: www.lot.com.

According to the flight schedules of LOT, the ATR planes are currently being employed for the following flights from Warsaw:

Domestic: Bydgoszcz, Gdansk, Katowice, Krakow, Poznan, Rzeszow, Szczecin, Wroclaw

International: Berlin, Kaliningrad, Lviv (Western Ukraine), Prague, Vilnius

Figure 27 Boundaries of the destinations of LOT / EuroLOT's 5 ATR 42 and 8 ATR 72 airplanes from WAW

Source: LOT's Timetable, 25 Mar 2007 / 27 Oct 2007, www.lot.com/Schedule2/img/Rozklad_Lato_2007-2.pdf

"Airlines of Poland": [21]

- Centralwings
- EuroLOT
- Jet Air
- LOT Polish Airlines
- Primacharter
- Silesian Air
- White Eagle Aviation
- Wizz Air

WEA - White Eagle Aviation

WEA was established in 1992 and started operations in 1993, initially operating sightseeing tours. In 1995 the company moved to Okecie Airport starting regular flights for United Parcel Service Inc. (UPS). The airline is owned by Katarzyna Frank-Niemczycka (50%) and Zbigniew Niemczycki (50%).

[21] http://en.wikipedia.org/wiki/Category:Airlines_of_Poland

WEA is based in Warzaw. It seems that of the 4 ATR42-300 of WEA, one is in the UK and one or more are in Italy. Thus there should be at least two planes stationed in Warsaw.

Figure 28 ATR 42 of White Eagle Aviation

Source: http://en.wikipedia.org/wiki/White_Eagle_Aviation

About WEA [22]

White Eagle Aviation is a full JAR OPS 1 operator registered in Poland, having the Air Operator Certificate (AOC) nr PL-004/06 and works in conjunction with its sister company WEA Cargo (trading name ACMS) – EASA Part 145 certified maintenance organization.

After 2004 when Poland joined the European Union WEA became a European low cost service provider for both airlines and non-aviation clients.

WEA provides both air services and full support in Europe with our Aircraft fleet, this support is backed up by years of knowledge and experience gained in the aviation market place.

WEA is a Polish carrier and operates four ATR-42 aircraft. It has its base in Warsaw. White Eagle´s main focus is on adhoc charter flights and wetleasing their aircrafts, e.g. operating for other European start-ups. [23]

[22] www.flywhoosh.com/aboutWEA.aspx
[23] www.whiteeagle.com.pl/

Jet Air

Jet Air Sp. z o.o. is a Polish air operator that provides leased aircraft to commercial end users. Jet Air started its operation activity in 2001 in business aviation as a broker rendering services (small aircraft and helicopters) to local operators and companies. Jet Air started scheduled operation for LOT Polish Airlines as of winter 2005/06 with three BAe Jetstream 32.

The airline mostly operates in the domestic Polish market, connecting Warsaw with Bydgoszcz, Katowice, Łódź and Zielona Góra. However, other airports within Poland (Gdańsk, Kraków, Poznań) are also served. Plans for expanding its international services are under discussion. [24]

Jet Air destinations as of November 2005 are listed below, with the IATA airport code shown in parentheses. They fly mainly to domestic destinations, but also operate charter international flights to Berlin, Dortmund, Klagenfurt, Vilnius, and other cities.

Domestic:

Bydgoszcz (BZG), Katowice (KTW), Kraków (KRK), Łódź (LCJ), Warsaw (WAW) -- hub city, Zielona Góra (IEG)

Fleet:

The Jet Air fleet consists of the following aircraft (as of August 2006): 3 BAe Jetstream 32

Bae 32 takes 18 passengers, and is a turbo prop airplane.

Jet Air operates the following flights on the LOT domestic network: Warsaw - Bydgoszcz, Warsaw - Katowice, Warsaw - Krakow, Warsaw - Lodz, Warsaw - Zielona Gora.

When necessary, Jet Air also operates other routes, such as: Warsaw - Gdańsk, Warsaw – Poznań, Warsaw - Szczecin.

Furthermore, Jet Air operates charter flights.

Figure 29 Fleet of Jet Air – three Jetstream 32 – for 18 passengers each

Source: www.jetair.pl

[24] http://en.wikipedia.org/wiki/Jet_Air

Blekingeflyg – of Sverigeflyg

Blekingeflyg fly a roundtrip Ronneby-Gdansk Mondays, Wednesdays and Fridays and advertise prices ranging from 295 SEK + taxes, at the moment 94 SEK.[25]

2007-08-28: Blekinegflyg have flights direct to Gdansk – Monday 27nd August Blekingeflygs primary flights between Ronneby and Gdansk. A route that ensures Blekinge comes closer to Polen and Europe.[26]

Apparently are there primary discussiontaking place about business flights on route. The types of aircraft servicing this route are, SAAB 2000 with places for 32 passengers.

Sverigefly consists of the following: gotlandsflyg.se, kullaflyg.se, blekingeflyg.se, sundsvallsflyg.se, kalmarflyg.se and smålandsflyg.se.

Sverigeflyg Holding is a partner in a collaboration of 6 Swedish Airlines. The conglomerate is both run

Sverigefly Holding are part owners in 6 local aircraft companies in Sweden. The company represents both domestic and international flights at a low cost concept. The first company, Gotlandsflyg, was introduced in 2001 and the growth of the company has been approximately 75% per year. The company is responsible for operation, business issues etc. The company carries aproximately 500000 passengers per year and has a turnover of approximately 420 million kroner, SEK (2007). There are approximately 70 employees in the company. The management team consists of the 6 managers of the aircraft company and 6 persons at the office in Visby.[27]

The route between Ronne – Gdansk, pricing and the subsequent aircraft type can, and the used aircraft type can be used too as an example for future routes between Poland and Bornholm.

Other examples to follow are the aircraft type which today serves summer routes and all year routes to and from Bornholm, typically aircrafts with seats for approximately 46 passengers, some aircraft more passengers.

Wonder if the aircraft has seats available the days, on which there are no flights to Gdansk, meaning on other days than Monday, Wednesday and Friday. – A look in the flight schedule shows that there are no planned flights to and from Ronneby on Saturdays during the summer period.

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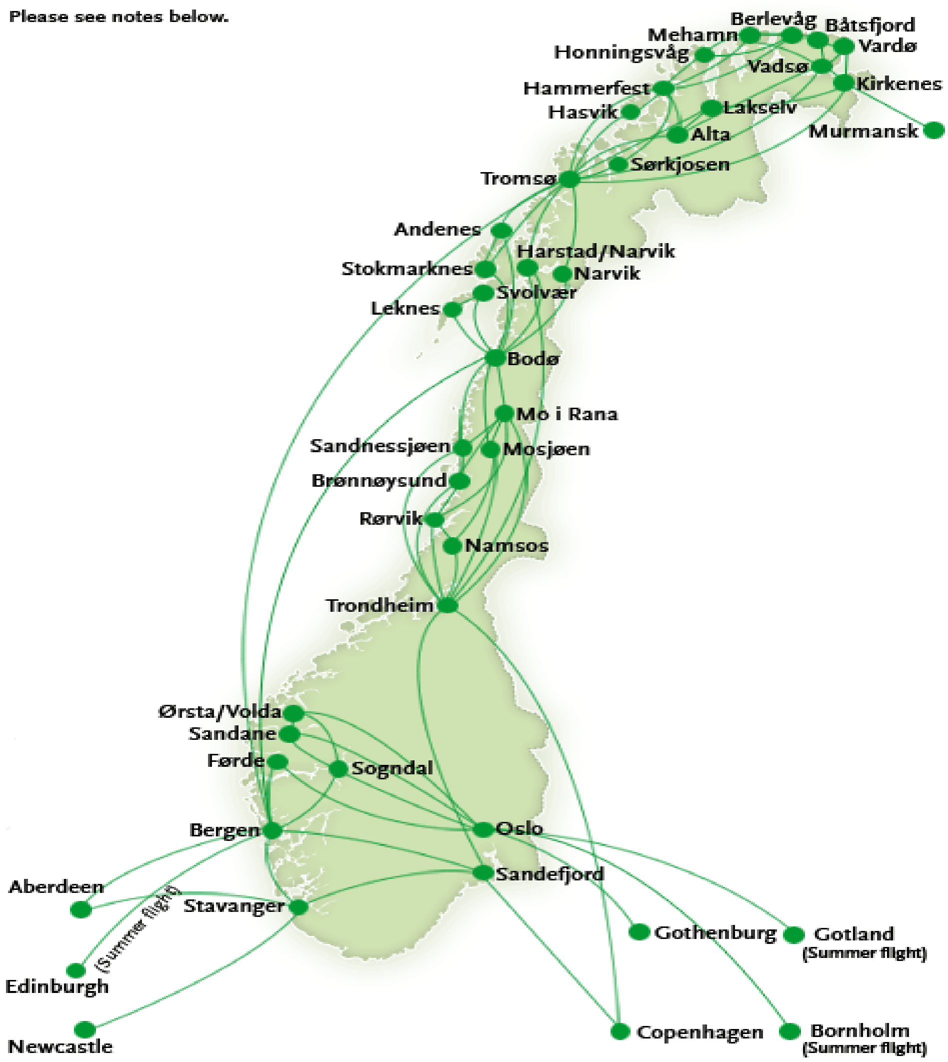
25 www.blekingeflyg.se/pdf/BLF-paussid1-polen-0708.indd.pdf
26 www.blekingeflyg.se/presstext.asp?pr_id=4
27 www.sverigeflyg.se/pdf/SVF-annons-platsannonsCFO-0707.pdf

Wideroe

Perhaps Wideroe would extend their Sunday (and Thursday) flight from Oslo-Bornholm, to Bornholm-Poland. – Or Bornholm-Stockholm Arlanda, return. But there are no examples from their route network of such an <u>international</u> route A-B-C-B-A. <u>Domestically</u> within Norway it is being done, though. For example Oslo – Kirkenes is offered with from 0 to 5 stops by Wideroe and/or SAS.

Figure 30 Route network of Wideroe



Notes: Bergen - Bodø: From Oct 28. 2007. - Bergen - Tromsø: Until Dec 31. 2007

Source: www.wideroe.no

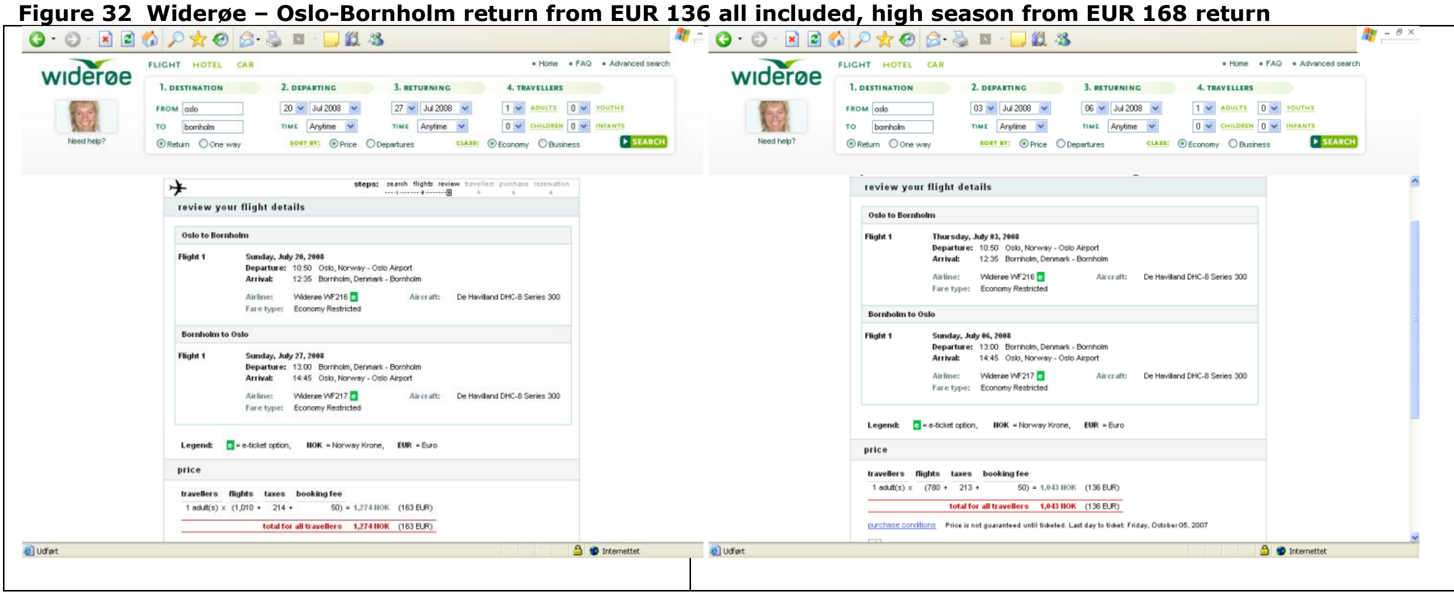
If Wideroe made a roundtrip from Bornholm to an airport in Poland before returning to Oslo, in case of any problems, Widereo would be able to get the passengers home to Oslo via Copenhagen. Within the EU, there are strict panalties, in case passengers are not transported home after a few hours from scheduled departure time. On the Wideroe website just one direct flight per day is offered between Gdansk and Oslo via another airline (Norwegian), and three per day between Warsaw and Oslo (two by LOT, one by Norwegian). From Poznan there are direct flights from/to Oslo, offered on the Wideroe website.

Figure 31 Wideroe - De Havilland Canada DHC-8-311 Dash 8, 50 seats

Source: www.wideroe.no

Wideroe will also fly Oslo-Bornholm in 2008, and the price in the high season is EUR 168 return including taxes and booking fee. In the beginning of the season, Thursday 3rd July to Sunday 6th July 2008 the price is 1043 NOK, i.e. 136 EUR including taxes and Internet booking fee. The flying time is 1 hour and 45 minutes each way. And the turnaround time in Bornholm Airport is 25 minutes.

Figure 32 Widerøe – Oslo-Bornholm return from EUR 136 all included, high season from EUR 168 return



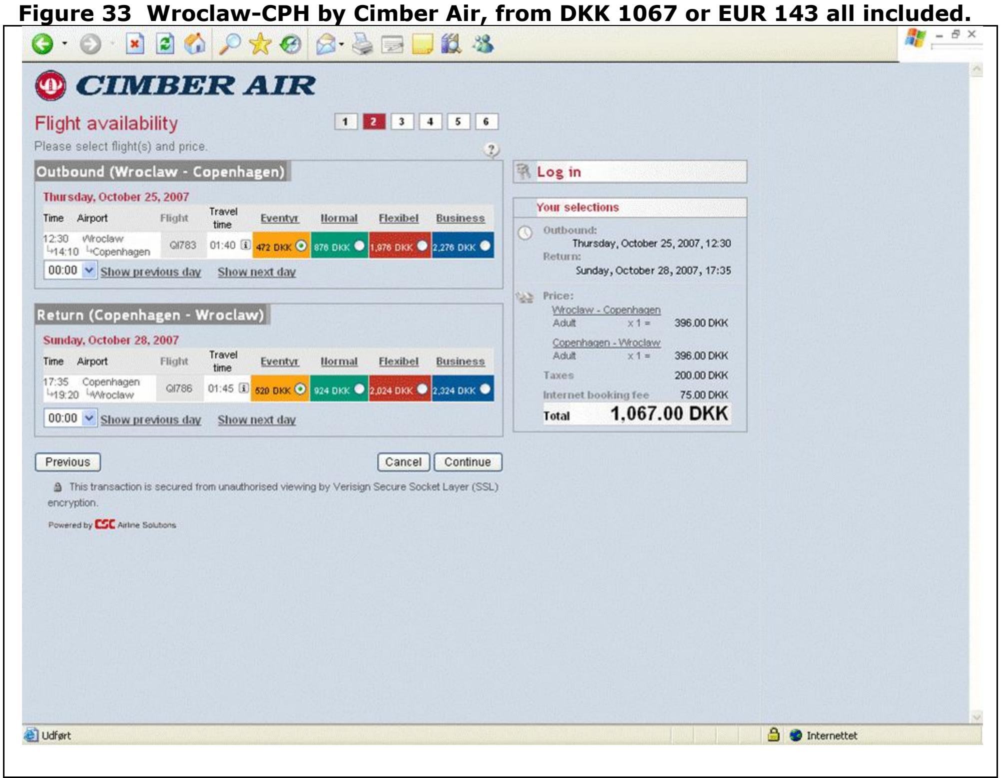
Lufthansa flew Hamburg-Bornholm in the summer 2007, and has announced that they will fly to Bornholm also during the summer season 2008. Lufthansa use the following aircraft type CRJ 100/200 with 50 seats. However, unlike Wideroe, seats on the Lufthansa flights were not yet bookable in the autoumn 2007, but they have announced that they will fly Hamburg-Bornholm again in the summer season 2008.

Cimber Air

Cimber Air has, among other routes, the route Copenhagen-Wroclaw, which it has operated since October 2002, when SAS discontinued the route. It is flewn daily, except Saturday. So, on Saturdays perhaps Cimber could fly Bornholm-Wroclaw or Bornholm-Warsaw in stead. The price for Wroclaw-CPH return cost from DKK 1067 return, including taxes and booking fee, i.e. EUR 143. – The ticket type is called Adventure – Eventyr. The Adventure (Eventyr) ticket is also available for example in July 2008, where most days are available at the lowest prices.

The distance Wroclaw-CPH is about the same as Wroclaw-Bornholm, or Warsaw-Bornholm or Warsaw-Berlin (523 km). The flying time Wroclaw-CPH is 1 hour and 40 minutes. The turnaround time in Wroclaw is 25 or 40 minutes. The route is flown by an ATR72 with 64 seats.

Figure 33 Wroclaw-CPH by Cimber Air, from DKK 1067 or EUR 143 all included.



Source: Cimber.dk, found 5 weeks before the return date.

Copenhagen – Wroclaw

Dep.	M	T	W	T	F	S	S	Arr.	Flight no.
1020	•	•	•	•	•			1205	QI 782
1735							•	1920	QI 786

Wroclaw - Copenhagen

Dep.	M	T	W	T	F	S	S	Arr.	Flight no.
1230	•	•	•	•	•			1410	QI 783
2000							•	2145	QI 787

Furthermore, it is actually possible to book a ticket at Cimber.dk from Wroclaw to Bornholm, however with change in Copenhagen. The Adventure (Eventyr) ticket is not available for through tickets Wroclaw-Bornholm via CPH.

The price of the through ticket Wroclaw-Bornholm via CPH return cost from DKK 2545. – Return tickets CPH-Bornholm cost from DKK 546 return, but a the time do not fit with the times of the Adventure (Eventyr) ticket. The price of a return ticket CPH-Bornholm, which fits with the Wroclaw-CPH fligt cost DKK 756 return. So, the minimum price Wroclaw-Bornholm via CPH is DKK 1067 (EUR 143) plus DKK 756 (EUR 102), i.e. EUR 245 in total.

But ideally tourists ought to be able to get from a major city in Poland to Bornholm for about EUR 143, like for the Wroclaw-CPH return flight, by a direct flight.

Cimber Air makes 6 roundtrips per day on the route Copenhagen-Bornholm, Monday-Friday, 3½ on Saturdays, and 6½ on Sundays. So, is there any extra capacity on Saturdays, to extend one of the flights CPH-Bornholm flights to include a return flight Bornholm-Gdansk or Bornholm Warsaw or Bornholm-Krakow?

The answer is that the plane is busy all the time from its start Saturday morning in RNN at 07.45, until the plane arrives to CPH Saturday afternoon 15.55, which is a full day’s work, with the exception a two hour lunch break in CPH from landing 12.20 to next departure 14.15. Friday evening a Cimber Air aircraft parks in Bornholm Airport.

Table 15 Cimber Air, summer schedule – Bornholm-CPH, CPH-Bornholm

Bornholm - Copenhagen

Dep.	M	T	W	T	F	S	S	Arr.	Flight no.
0650	•	•	•	•	•			0735	QI 606
0745						•		0820	QI 610
0800					•			0835	QI 604
0850	•	•	•	•				0925	QI 604
0945						•		1020	QI 612
0955							•	1030	QI 614
1135	•	•	•	•	•			1210	QI 618
1145						•		1220	QI 624
1200							•	1235	QI 620
1435	•	•	•	•	•		•	1510	QI 624
1520						•		1555	QI 626
1650	•	•	•	•	•		•	1725	QI 626
1840							•	1915	QI 628
1930	•	•	•	•	•			2005	QI 644
2030							•	2105	QI 644

Copenhagen - Bornholm

Dep.	M	T	W	T	F	S	S	Arr.	Flight no.
0705					•			0740	QI 603
0755	•	•	•	•				0830	QI 603
0850						•		0925	QI 611
0900							•	0935	QI 613
1035	•	•	•	•	•			1110	QI 617
1045						•		1120	QI 623
1100							•	1135	QI 619
1335	•	•	•	•	•		•	1410	QI 623
1415						•		1450	QI 625
1555	•	•	•	•	•		•	1630	QI 625
1745							•	1820	QI 627
1830	•	•	•	•	•			1905	QI 643
1930							•	2005	QI 643
2210	•	•	•	•	•		•	2245	QI 651

Source: Cimber.dk, summer schedule

SAS – Scandinavia Airlines

SAS has itself flights between Copenhagen and the following airports in Poland: Warsaw, Poznan and Gdansk. The Gdansk route goes right over Bornholm. Furthermore Air Baltic, the SAS subsidiary, has a route Vilnius-Warsaw, and a second SAS subsidiary, Blue1, has a route Helsinki-Warsaw.

During the third week of August 2008 there will be as many as four roundtrips by SAS itself, every day Monday-Friday, two roundtrips on Saturdays and three on Sundays.

So, on Saturdays, there should be the opportunity to make a roundtrip Gdansk-Bornholm for a SAS plane. The plane from CPH arrives in Gdansk 10.20. In stead of returning after 30 minutes at 10.40, it could possibly make a return flight Gdansk-Bornholm. From the start of one roundtrip Gdansk-CPH there is 4 hours and 20 minutes. A roundtrip to Bornholm could be done in 4 hours, easily, with two times 30 minutes for turnarounds, and some 45 minutes flying time each way.

The type of airplane used on the relevant day and time is a De Havilland DHC-8 400 Series, also known as Dash8/Q400, which has 72 seats. SAS has 13 of this type of aircraft.

As mentioned SAS is also serving the route CPH-WAW, and CPH-Poznan. CPH-WAW is flewn twice a day, every day, by SAS itself, and by a partner airline, actually LOT, also twice a day. SAS uses the Dash8/Q400 for the route (72 seats). Since the route CPH-WAW is flewn in the same manner every day, there does not seem to be avaialble capacity to make a trip WAW-RNN, except by cancelling the Saturday flight in July and August, and in stead fly a round WAW-RNN, i.e then fly one round-trip CPH-WAW in stead of two. Economy prices for WAW-CPH by SAS are from EUR 175 (DKK 1305) including taxes and booking fee. – Gdansk-CPH by SAS is more expensive and cost from DKK 1732 (EUR 233).

SAS's CPH-Poznan route is actually operated by Cimber Air, using the Canadair Regional Jet 200. It has 50 seats, and is the same type which is used on the route Billund-Bornholm. The price for a return economy ticket is DKK 1571, EUR 211.

The route is flewn once a day, except on Saturdays. Dept. CPH 12.05, flying time is 1.05; arr. Poznan 13.10, turnaround time is 25 minutes, dept. Poznan 13.35, arr. CPH 14.40. Of course it could be possible to make a roundtrip Poznan-Bornholm, before returning from Poznan to CPH. But Saturday would be the preferred day of a flight Poznan-Bornholm, but on Saturdays the Cimber CJR200 is not coming to Poznan.

So, with respect to the three cities in Poland, which is served by SAS, or Cimber: Warsaw (SAS), Gdansk (SAS), Poznan (operated by Cimber for SAS) and Wroclaw (Cimber), Gdansk seems to be only one of the four cities, were a plane, judged from the timetables, could be made available, with a single modification of the schedules: The return flight on the second round from Gdansk should be postponed about three hours, and in the meantine a roundtrip Gdansk-Bornholm could be made, in two times 45 minutes for the flight, at two times 25 minutes for the turnarounds, i.e. 140 minutes, two hours and 20 minutes, mininum, but lets say 2½ hours, or certainly no more than 3 hours.

Possibilities of increased tourism from Poland to Bornholm – by sea

The following indicators of the interest in and potential for visits to Bornholm from various counties of Poland were developed in a study done in 2006 of the Polish market. These have in turn implications for both sea and air travel to/from Poland.

The table shows the following four indicators:

1. Befolkning % = Percent of the Polish population which come from each county.
2. Nexø % = Percent of Polish visitors via Nexø who come from each county.
3. Rønne % = Percent of Polish visitors via Nexø who come from each county.
4. DB info % = Percent of information requests received by Destination Bornholm, www.bornholm.info, from Poland by county.

Table 16 Population, passengers via Nexø, passengers via Rønne and interest in Bornholm by county in Poland 2006

Voivodship / Amt	Hovedby	Befolk-ning %	Nexø %	Rønne %	DB info. %
Zachodnio-pomorskie	Szczecin	4%	**21%**	15%	11%
Wielkopolskie	Poznań	9%	13%	14%	11%
Lubuskie	Gorzów Wielkopolski	3%	3%	2%	3%
Łódzkie	Łódź	7%	**10%**	3%	4%
Mazowieckie	Warszawa	13%	11%	**22%**	27%
Pomorskie	Gdańsk	6%	6%	**12%**	8%
Warmińsko-mazurskie	Olsztyn	4%	3%	1%	2%
Kujawsko-pomorskie	Bydgoszcz	5%	3%	**5%**	**6%**
Śląskie	Katowice	12%	9%	8%	8%
Małopolskie	Kraków	9%	5%	4%	5%
Dolnośląskie	Wrocław	8%	5%	**8%**	**8%**
Opolskie	Opole	3%	1%	**3%**	**3%**
Świętokrzyskie	Kielce	3%	**3%**	1%	1%
Lubelskie	Lublin	6%	**4%**	1%	2%
Podlaskie	Białystok	3%	1%	1%	1%
Podkarpackie	Rzeszów	5%	1%	2%	1%
Total		100%	100%	100%	100%

Source: The Polish market for ferry transport to Bornholm, CRT, 2006.

For example, the table shows that 13% of the population in Poland come from the Warsaw area, 11% of visitors via Nexø (with its many one day visitors) come from the Warsaw area, but 22% of the Polish tourists who come by car to Bornholm are from the Warsaw area, and finally, 27% of those who show an interest in visiting Bornholm come from the Warsaw area.

Tourism trade fairs in Poland

There are two major tourism fairs in Poland: TT Warsaw in September and Tour Salon in Poznan in October.

Also, there are several other tourism fairs, for example in Katowice in April.

Table 17 Travel Trade Fairs in Poland - 2007

16-18.02.2007	Spring Tourism Exchange 2007	Poznan
02-04.03.2007	13th International Touristic Sites Fair WHERE CULTURES MEET 2007	Lodz
22-24.03.2007	EuroGastro - 11th International Food Service and Hotel Equipment Trade Fair	Warsaw
30.03-01.04.2007	GLOB 2007 - 13th International Fair for Tourism, Sailing and Sport Equipment	Katowice
13-15.04.2007	WARM BALTIC 2007 - Tourism Investment Fair	Gdansk
13-15.04.2007	GTT 2007 - Gdansk Tourism Fair	Gdansk
20-22.04.2007	12th Fair of Tourism and Recreation - LATO 2007 (SUMMER 2007)	Warsaw
20-22.09.2007	15th International Travel Show - TT Warsaw Tour & Travel 2007	Warsaw
24-27.10.2007	TOUR SALON 2007 - XVIII International Tourism Fair – Fair of Regions and Tourist Products www.tour-salon.pl/	Poznan

Source: http://business.poland.com/fair-and-exhibitions/

At Tour Salon 2006, exhibitors included the following: VisitDenmark, KontaktBornholm and Bornpol. Ferry lines included: Polferries, Unity Line, Bornholmstrafikken in Kołobrzeska Żegluga Pasażerska (KZP).[28]

VisitDenmark was present with a stand at the TT Warsaw fair, Tour & Travel 2007. Novasol also had a stand, promoting cottage holidays in all of Scandinavia. Norway had a prominent presence at the exhibition and the Danish stand was in a hall mostly occupied by Norwegian stands.

Obviously, one way to promote Bornholm tourism in Poland is to participate in one or more of the above fairs. At the Danish stand, there was great interest in Bornholm among the visitors.

[28] www.baltic-travel.com/?screen=news&action=wiecej&id=1146

All year sailings – should they be from Germany or Poland (or both) during the winter?

If a new car ferry is built, sailing from the south to and from Bornholm, it could either sail to Germany or to Poland, or serve both countries. In the summer time there are lots of Polish holiday makers who would like to bring their cars with them to Bornholm. In the winter, it may not be so.

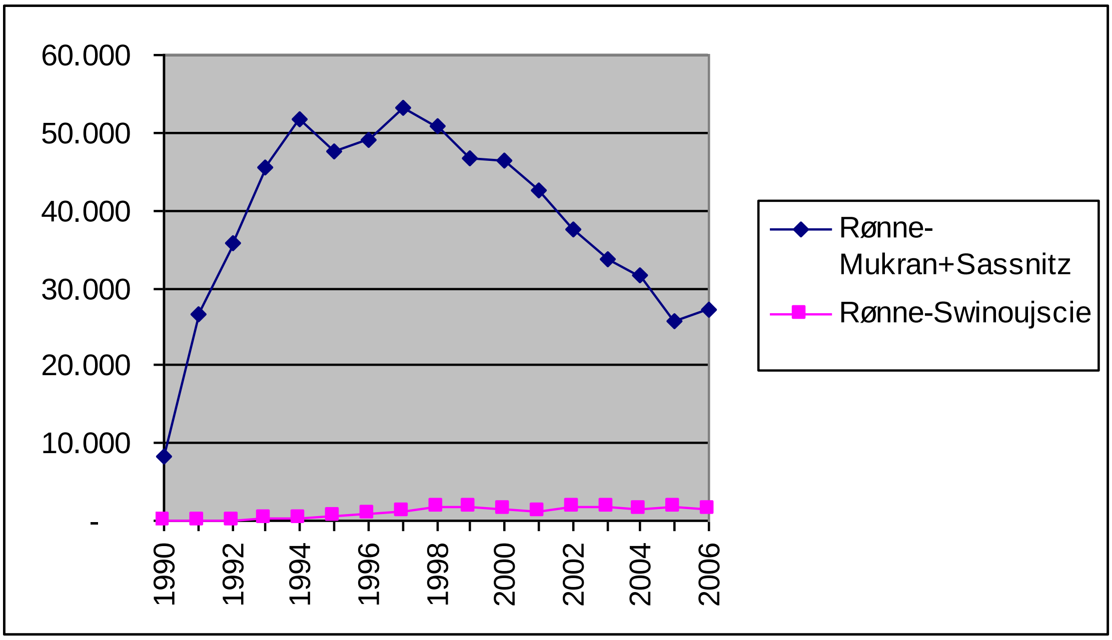
In 2006 there were 69 cars per departure to/from Poland and 86 cars per departure to/from Germany. However, the sailing season was longer and the number of roundtrips per week was higher to/from Germany than to/from Poland. Eleven roundtrips were made to/from Poland by the car ferry to Rønne and 158 roundtrips were made to/from Sassnitz. In 2006 a total of 27,230 cars were transported between Germany and Bornholm, but only 1,513 between Poland and Germany, i.e. from/to Poland there were just 6% of the number of cars to/from Germany. This could mean two things: That the German market for transport of cars to Bornholm is much larger than the Polish market for transport of cars to Bornholm or that there is a great potential to develop the Polish market for transport of cars to Bornholm. It could also be a combination of the two explanations which is more likely.

Table 18 Number of cars on routes between Poland and Bornholm, and Germany and Bornholm, 1990-2006

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Rønne-Swinoujscie	0	0	101	257	317	472	799	1274	1728	1880	1372	1290	1691	1633	1465	1666	1513
Rønne-Mukran	0	0	0	8752	12915	18155	19992	22524	23302	21906	20953	21736	0	0	0	0	0
Rønne-Sassnitz	8300	26500	35746	36821	38910	29317	29093	30583	27546	24766	25483	20835	37680	33665	31526	25811	27230
Rønne-Germany	8300	26500	35746	45573	51825	47472	49085	53107	50848	46672	46436	42571	37680	33665	31526	25811	27230
Poland in % of Germany	0,0%	0,0%	0,3%	0,6%	0,6%	1,0%	1,6%	2,4%	3,4%	4,0%	3,0%	3,0%	4,5%	4,9%	4,6%	6,5%	5,6%

Source: Statistikbanken.dk

Figure 34 Number of cars on routes between Poland and Bornholm, and Germany and Bornholm, 1990-2006



Source: Based on Statistikbanken.dk

For a number of years until 2002 there were all year sailings from Germany to Bornholm, even by two different ferry lines, Bornholmstrafikken and Scandlines. In the meantime, the number of German bed nights in Denmark as a whole dropped dramatically, from a high of 19.8 million in 1995 (via 15.7 in 2000) to 13.6 million in 2006, i.e. a drop of 31%. The drop from 2000 to 2006 was 13%. On Bornholm the drop has been even more dramatic, from a high of 982,000 in 1994 (via 716,000 in 2000) to an all time low of 496,000 in 2006, a drop of 49%. The drop on Bornholm in German bed nights was 31% from 2000 to 2006. One could argue that Bornholm has lost ground on the German holiday market compared to Denmark as a whole, going from a 5.1% share in 1994, over 4.6% in 2000 to 3.7% share in 2006, because accessibility from Germany to Bornholm has decreased dramatically. In 1994, the number of roundtrips to/from Germany was 395 and in year 2000 352 by two ferry lines, in 2006 the number was 158 roundtrips by only one ferry line.

Figure 35 Cars per departure on ferries per month from Germany and Poland to/from Bornholm, 2000-2006

	1	2	3	4	5	6	7	8	9	10	11	12
Rønne-Mukran 2000	43	**11**	23	60	65	76	93	95	111	44	20	**21**
Rønne-Mukran 2001	**18**	19	28	68	87	79	96	94	108	55	19	25
Rønne-Sassnitz 2000	96	21	**20**	64	64	54	71	85	84	**44**		
Rønne-Sassnitz 2002				52	64	74	72	83	85	49	27	
Rønne-Sassnitz 2002	**15**	18	37	49	116	88	103	108	144	91	**13**	22
Rønne-Sassnitz 2003	41		31	65	115	88	84	114	155	78	22	
Rønne-Sassnitz 2004				61	108	80	94	104	118	76		
Rønne-Sassnitz 2005					107	70	84	91	117	80		
Rønne-Sassnitz 2006				46	97	73	76	98	128	77		
Rønne-Sassnitz 2007			68	49	104	81						
Rønne-Swinoujscie 2000						23	47	100	14			
Rønne-Swinoujscie 2001						33	42	102	34			
Rønne-Swinoujscie 2002						26	51	123				
Rønne-Swinoujscie 2003						24	41	121				
Rønne-Swinoujscie 2004						25	54	101	12			
Rønne-Swinoujscie 2005						21	65	112	22			
Rønne-Swinoujscie 2006						20	50	115	30			
Rønne-Swinoujscie 2007						52						

Source: Based on data from Danmarks Statistik, statistikbanken.dk

Consistently there have been fewer cars per departure on the routes from/to Poland compared to the routes from/to Germany during the months of June, July and September. Only in August does the number of cars per departure on the routes from Poland match the corresponding numbers from Germany. The sailing season in 2008 for Bornholmstrafikken will according to the sailing schedule be from 15th March to 2nd November (in 2007 it was from 31st March to 28th October). Thus the following is suggested:

A new car ferry could make (2 or) 3 roundtrips to/from Germany, Sassnitz, immediately following the end of the sailing season by Bornholmstrafikken thereby reintroducing all year sailings to Germany. At the same time, depending on demand, there could be all year sailings between Poland and Bornholm with 2 (or 3) roundtrips per week. From a freight perspective, if transport of trailers is desirable, it should not matter too much whether the sailings are to/from one of the Polish ports or to/from Sassnitz. In the past, when there were all year sailings Bornholm-Germany, the same number of trucks were sailed across per week in the winter as in the summer, although one ferry route took about 5 roundtrips per week during the summer and only 2 roundtrips per week during the winter half. When there were winter sailings (all year sailings) Germany-Bornholm, there were around two roundtrips per week per ferry line during the winter period and five roundtrips per ferry line per week during the summer (Based on Rønne-Mukran by Bornholmstrafikken in 2000 and 2001, and Rønne-Sassnitz in 2002 by Scandlines).

Table 19 Winter and summer sailings Bornholm-Germany, 2000, 2001, 2002 (average)

Per week, two lines	Summer	Winter	Year
Roundtrips per week	7,9	2,8	5,3
Cars per week	1.386	175	780
Trucks per week	20	17	18
Trucks / all cars, %	1%	10%	2%
All cars per departure	88	32	73
Trucks per departure	1,3	3,0	1,7

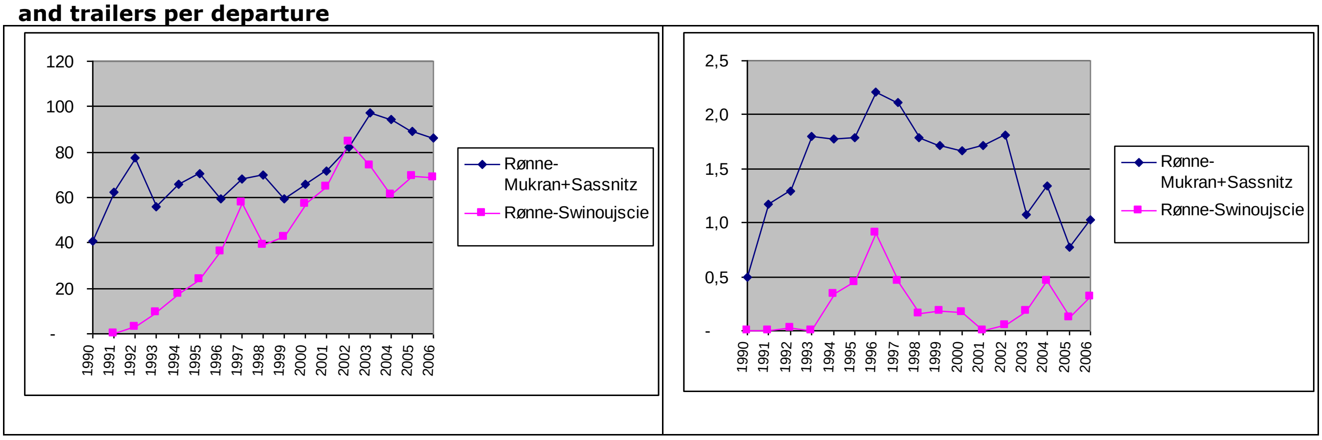
Per week, one line	Summer	Winter	Year
Roundtrips per week	4,8	2,2	3,5
Cars per week	922	133	527
Trucks per week	12	13	12
Trucks / all cars, %	1%	10%	2%
All cars per departure	96	30	75
Trucks per departure	1,2	3,0	1,8

Note: One line is based on Bornholmstrafikken in 2000 and 2001 (Mukran), Scandlines in 2002 (Sassnitz).

Over the whole sailing season, ever since 1994 till and including 2006, there has always been less than one truck per departure on the route Rønne-Swinoujscie with 0.3 trucks per departure on average: Seven trucks on 22 departures (11 roundtrips). In comparison, there were 1.7 trucks or trailers per departure on the routes between Bornholm and Germany from 1994 to 2006 but in 2006 it was down to 1.0 per departure. On the freight route Rønne-Køge, there were 26 trailers per departure in 2006. After the all year sailings Bornholm-Germany stopped in 2002 less freight goes via Rønne-Sassnitz. Thus it seems that there would be limited freight on routes Bornholm-Poland and Bornholm-Germany. In the winter, there were historically (2000-2002) 30 vehicles of which 3 were trucks/trailers per departure on one route to Germany.

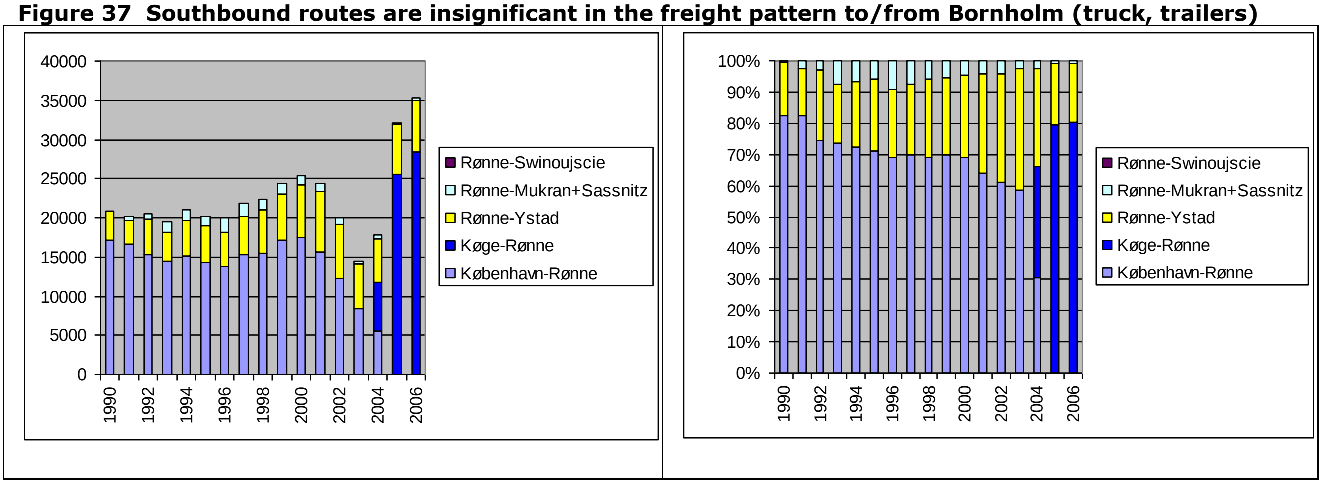
In the meantime (from 2000 to 2006), German tourists on Bornholm have dropped by 31%. Even so, with all year sailings with a big ship there should be some 20 vehicles of which two would be trucks per departure in the winter period on a route between Sassnitz and Bornholm. With a small ship there would be less, perhaps 10 vehicles of which 1 would be a truck/trailer per departure. Counting 1 truck/trailer as 6 person cars it would correspond to 9+6=15 person car units per departure. This is a higher number of cars per departure than would be expected in the winter on a route Poland-Bornholm. Moreover, there would probably be 3 persons per vehicles on average, i.e. 45 passengers per departure from/to Germany. On trips Germany-Bornholm there would not be any one-day visitors. If or when the same ship sails Poland-Bornholm there would be at least as many passengers per departure in the winter period as on a route to Germany but there would be fewer cars in the winter. Ten vehicles (15 person car units) would probably be up near the maximum that could be achieved on a route Poland-Bornholm in the winter. However, if winter sailings were made to two countries instead of only one, it might be economically feasible to establish all year sailings to both Poland and Germany. It has to be said though, that in the winter it seems there would be a greater transport demand Germany-Bornholm than Poland-Bornholm. All year sailings Poland-Bornholm may thus be economically feasible if winter sailings Germany-Bornholm are restarted with a smaller ship than is currently undertaking sailings Germany-Bornholm. During the winter half, when no other ships are sailing between Germany and Bornholm there will be greater transport demand Germany-Bornholm than Poland-Bornholm, notably from private vehicles. Thus, if a ship is built and utilized part of the week on Germany-Bornholm route, the ship could also make roundtrips Poland-Bornholm in the winter period while being busy on Poland-Bornholm during the summer.

Figure 36 all cars on routes between Bornholm, Poland and Germany per year, per departure. And: Trucks and trailers per departure



Source: Based on Statistikbanken.dk

Figure 37 Southbound routes are insignificant in the freight pattern to/from Bornholm (truck, trailers)



Source: Based on Statistikbanken.dk

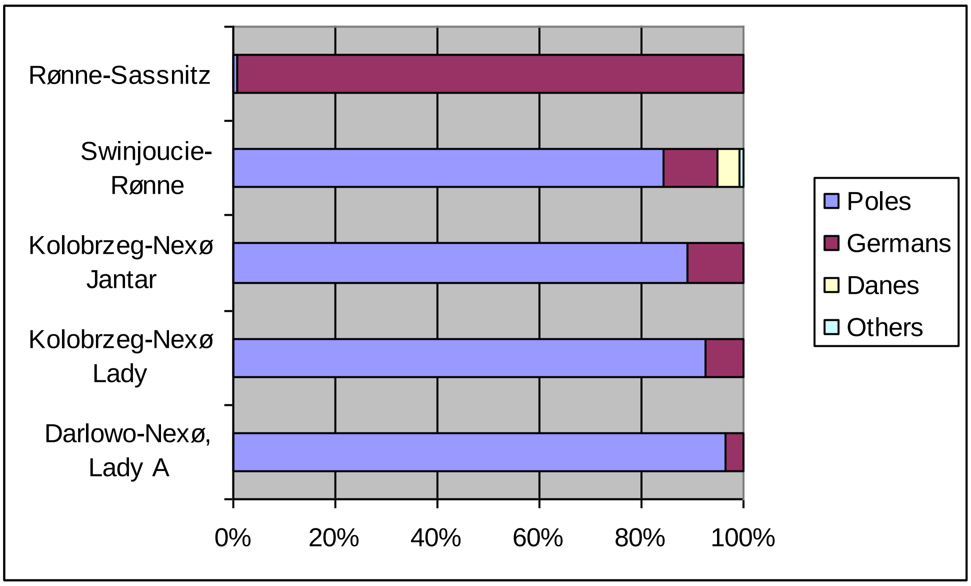
According to schedules published by Bornholmstrafikken for 2008 there will be three weekly roundtrips from 15th March to 25th May and from 22nd September to 2nd November. Between these periods there will be more than three weekly roundtrips. In the low seasons mentioned above, the weekly trips are on Thursdays, Saturdays and Sundays.

Above it is argued that a small/medium car ferry should continue with sailings to/from Sassnitz from November to middle of March when Bornholmstrafikken no longer sails and if not on Thursdays, Saturdays and Sundays, then perhaps on two out of these three days. This would reintroduce all year roundtrips by boat Germany-Bornholm[29].

Moreover history shows that Polish people prefer to sail from Poland to Bornholm, and German prefer to sail from Germany to Bornholm. After sailing for about 15 years on the route Swinjoucie-Rønne, Polferries had 84% polish, just 11% Germans, and 5% Danes/others in 2006. On the routes further east there were either the same or a lower percentage of Germans and other non-Polish. And correspondingly, there were few Poles on the route Sassnitz-Rønne, the overwhelming majority being Germans.

[29] In a recent survey on Rønne-Sassnitz German visitors were asked what could bring them to visit Bornholm outside of the main season. Many respondents pointed out the lack of a ferry connection as the main obstacle to such visits (CRT).

Figure 38 Nationality split on sailing routes between Poland, German and Bornholm



Source: The polish market for ferry transport to Bornholm, CRT 2006.

In summary:

- A car ferry (for about 50 car units) could get more cars per departure during winter by sailing Germany-Bornholm instead of Poland-Bornholm. A new car ferry could serve both markets though during the winter. A new car ferry could thereby reintroduce winter sailings between Germany and Bornholm as well as make winter sailings Poland-Bornholm, if the latter could prove profitable.
- In the summer, a medium-sized car ferry should be busy enough on Poland-Bornholm route(s) and if not, supplementary spring and autumn sailings between Germany and Bornholm could be undertaken.
- In May and September, the bus transport market in Poland could be targeted by a car ferry operator, whether Polferries or an additional operator.

Possibilities of establishing summer route between Poland and Bornholm – by air

LOT / EuroLOT

An analysis of the departures from Warsaw by the 13 ATR planes shows that Saturdays are clearly the day where there are fewest departures: 30 on Saturdays vs. up to 38 during midweek. The second-most quiet day for the ATR planes is Sunday and the third-most quiet day by the ATRs is Tuesday.

This is good news for the possibilities of establishing a summer route to Bornholm since Saturday is the first priority travel day for holiday makers to Bornholm. Sunday is second priority and a midweek day such as Tuesday third priority. If Bornholm should have two arrivals from a foreign country such as Poland, Saturday and Tuesday would be preferable. It would make it possible for holiday makers to choose a full week, typically Saturday-Saturday or a three night stay Saturday-Tuesday or a four night stay (for example for the price of three nights) Tuesday-Saturday.

Thus for Bornholm, the priorities would be as follows in the case of ATR planes from LOT/EuroLOT:

1. Saturday and Tuesday – Saturday a 64 or 46 seat airplane, 64 in the peak season, 46 seat ART on Tuesdays.
2. Saturday only.
3. Sunday only.

Table 20 Number of departures from WAW per day and week by 13 ATR planes, 25 March – 27 Oct. 2007

Destination	1 MO	2 TU	3 WE	4 TH	5 FR	6 SA	7 SU	Per week	Minutes
Bydgoszcz	1	1	1	1	1	1	1	7	60
Gdansk	7	7	7	7	6	5	6	45	65
Katowice	1	1	1	1	1	1	1	7	60
Krakow	4	4	4	4	4	4	4	28	60
Poznan	5	4	5	4	5	4	4	31	65
Rzeszow	2	2	2	3	2	3	3	17	60
Szczecin	3	2	3	3	3	2	2	18	90
Wroclaw	8	8	8	8	8	5	6	51	70
Domestic	31	29	31	31	30	25	27	204	**67**
Berlin	1	1	1	1	1	1	1	7	100
Kaliningrad	1	1	1	1	1	1	1	7	75
Lviv (Ukraine)	1	1	1	1	1	1	1	7	80
Prague	2	2	2	2	2	1	1	12	100
Vilnius	1	2	2	2	2	1	2	12	85
International	6	7	7	7	7	5	6	45	**89**
Total	37	36	38	38	37	30	33	249	**71**

Source: www.LOT.com, Timetable, 25 Mar 2007 / 27 Oct 2007

http://www.lot.com/Schedule2/img/Rozklad_Lato_2007-2.pdf

Bornholm	0	1	0	0	0	1	0	2	100
		46 seater				46 / 64 seater			

LOT's EuroLOT planes, ATR 46 and/or ATR 72 could fly to Bornholm at the following times:

1) Saturdays and Tuesdays, 01 July – 03 Sept., instead of Szczecin (90 min. flight).

1a) Available, on Saturdays: WAW Dept. 13.40, arr. Szczecin SZZ 15.10.

Suggestion: Dept. WAW 13.50, arr. Bornholm 15.30 (a 100 min. flight).

Dept. Bornholm 16.05, arr. WAW 17.45 (35 min. turnaround, 100 min. flight).

There is a departure from Bornholm Airport at 15.20 on Saturdays.

Therefore departure from WAW should be 13.50 rather than 13.40.

1b) Available, on Tuesdays: WAW Dept. 16.35, arr. Szczecin SZZ 18.05.

Suggestion: Dept. WAW 16.35, arr. Bornholm 18.15 (a 100 min. flight).

Dept. Bornholm 18.50, arr. WAW 19.30 (35 min. turnaround, 100 min. flight).

Airplane type and size: "Equipment varies", but either ATR 46 or ATR 72.

Other arrivals and departures in Bornholm Airport, around the mentioned times:

Saturdays: There is a departure by Cimber at exactly 15.20. –

So delay arrival and departure by 5 or 10 minutes.

The departure by Cimber 15.20 is the last currently scheduled operation at Bornholm Airport after which it closes. Thus the airport on Bornholm would need to be kept open an extra hour or so. This would incur extra costs for Bornholm Airport.

Tuesdays: There is an arrival by Cimber on Tuesdays at 19.05. The previous operation is a Cimber departure at 16.50. DAT has an arrival from CPH at 18.05. Thus it should be no problem to receive the EuroLOT airplane at Bornholm Airport 10 minutes later at 18.15. Likewise, it should be no problem to have a EuroLOT departure on Tuesdays at 18.50, since it is 15 minutes before the Cimber arrival.

2) Sundays: Instead of Prague which is not flown on Sundays,

A 100 min. flight, like WAW-Bornholm:

Dept. WAW 07.40, arr. Bornholm 09.20.

Dept. Bornholm 09.55, arr. WAW 11.35.

Airplane type and size: "Equipment varies", but either ATR 46 or ATR 72.

Other arrivals and departures in Bornholm Airport, around the mentioned times:

Sundays: There is an arrival by a Cimber flight at Bornholm Airport on Sundays at 09.35, so it should be no problem receiving a EuroLOT plane 15 minutes earlier at 09.20.

Apart from the flights by the ATRs from/to WAW, there is a daily flight by an ATR from/to Hamburg, two daily flights Poznan-Frankfurt Main, one daily flight Wroclaw-Frankfurt Main, two daily flights by ATRs Krakow – Vienna (one on Saturdays), two daily flights by ATRs Poznan-Munich (one on Saturdays), two daily flights by ATR's Wroclaw-Munich,

The flight Krakow – Vienna which is not flown on Saturdays dept. Krakow 07.35 arr. Vienna 08.45, dept. Vienna 09.40 arr. Krakow 10.55. In due course, if a route WAW-Bornholm becomes a success, a second route could be considered, i.e. Krakow-Bornholm, on Saturdays at the times when the Krakow – Vienna route is not flown.

Price examples

Ferry prices, Kolobrzeg-Nexø - KZP

A day-return by the ferry Kolobrzeg – Nexø return is PLN 160, by KZP (43 EUR).

Single tickets on the ferry cost PLN 110 each way, i.e. PLN 220 return, 59 EUR.

Table 21 Prices Kolobrzeg-Nexø 2007 – 110 PLN one way, 160 PLN same day return

KOŁOBRZEG - NEXØ	tour/ retour *	one way
Adults	160 PLN	110 PLN
Children from 4 up 12 years	130 PLN	100 PLN
Children less 4 years	free	free
family ticket: Two adults + children from 4-12 years (price per one person)	140 PLN	100 PLN
Group ticket min. 15 persons (price per one person)	130 PLN	100 PLN
Bicycle	40 PLN	20 PLN
Moped	100 PLN	50 PLN
Motorbicycle	150 PLN	130 PLN
Cargo per 1 kg per 1m3	2 PLN 100 PLN 100 PLN	

* Price for return tickets
is valid retourning on the same day

Source: www.kzp.man.pl

LOT – price example

The lowest price WAW – CPH return is PLN 623. – Next lowest is PLN 768. On top of the PLN 623 which includes taxes comes a booking fee of PLN 25, i.e. final price is PLN 648 return, minimum (174 EUR). The ticket is electronic.

Warsaw (WAW) - Copenhagen (CPH) return ticket 22.09.2007 - 29.09.2007

Norwegian – price example

Norwegian.no sell WAW – CPH return for PLN 499, Saturday 22nd Sept. – Saturday 29th Sept., checked about five days before departure. Lowest price is PLN 325 including taxes and fees, for example 18th Sept. to 24th Sept., checked at 9th Sept. – Lowest price is PLN 229 for 25th – 26th Sept. or Tuesday 25th Sept. – Monday 1st Oct. or Thursday 27th Sept. - Monday 1st Oct.. So, when booked two or three weeks ahead, if taking three days off, Polish holiday makers can get to Copenhagen and back to Warzaw for PLN 229 (62 EUR) plus the four nights of accommodation of course.

The PLN 229 is largely same price as a return ticket from Copenhagen to Bornholm by bus or train and fast ferry. Also, it is the same as two single tickets by the ferry from Kolobrzeg to Nexø and back, since they cost PLN 110 each, i.e. PLN 220 (EUR 59).

Outbound: Warsaw - Copenhagen

Thursday 27 Sept 2007 14:10

Flight DY2062 - Low fare

1 Adult 104 zł

Return: Copenhagen - Warsaw

Monday 1 Oct 2007 09:25

Flight DY2065 - Low fare

1 Adult 125 zł

Total price (all inclusive) 229 zł (62 EUR)

Currency note: The total price is charged in Norwegian kroner (NOK).

Total price: 466 NOK

Wizzair – price example

Wizzair offers many flights from Warzaw to Malmö (near Copenhagen and near Bornholm) for PLN 1 each way plus taxes and fees. – Including taxes the price is PLN 159 return, plus payment fee of EUR 3 per passenger per one way flight, i.e. EUR 6 extra. – In total around EUR 40+6=46. However, Malmö Sturup Airport is not a destination per se. There is a long way from that airport to central Copenhagen. It takes 45 minutes each way by an airport bus, which cost EUR 15 each way, i.e. EUR 30 return. So, the total price for return air ticket and transfer is EUR 76. In Warsaw the airport bus cost about EUR 1.20 return (PLN 2.40 each way). – However, there is a good share of Polish workers going to Sweden (and back), and a good deal of Swedish wanting to visit Poland.

Going Out

Warsaw Etiuda Terminal >>

Malmo

W6 441 - Depart WAW 2:35 PM 09/27/07

Arrive MMX 3:50 PM 09/27/07

Coming Back

Malmo >>

Warsaw Etiuda Terminal

09/30/07 W6 442

Depart MMX 4:30 PM

Price Summary

Going Out

WAW >> MMX

1 Adult @ 1 PLN 1 PLN

Taxes / Fees [details] 66 PLN

Coming Back

MMX >> WAW

1 Adult @ 1 PLN 1 PLN

Taxes / Fees [details] 91 PLN

Price excluding payment handling fee 159 PLN (43 EUR!).

Price including payment fee would be 43+6=49 EUR (181 PLN).

Ryanair – price example

By Ryanair Warsaw-Dublin is available for PLN 316 return including taxes, e.g. 27 Sept – 1 Oct. 2007 (EUR 85). Insurance for PLN 57 is offered, but can be deselected. To check in one bag is PLN 48 per one way flight. – On top of this probably comes payment card fee of EUR 3 per person per one way trip, but it is hard to tell, since that fee does not show up until after billing address and email address etc. has been stated. – The basic return flight including taxes, excluding insurance, no bags, but including 2*3 EUR payment fee would be EUR 85 + 6 = EUR 91 (PLN 338).

Centralwings – price example

Price example: Warsaw – London Stansted:

OUTWARD FLIGHT - Fri, 28 Sep 07

Flight C0 279 13:20 Depart Warsaw (WAW)

14:50 Arrive, London Stansted (STN)

RETURN FLIGHT - Mon, 01 Oct 07

Flight C0 280 19:35 Depart London Stansted (STN)

22:50 Arrive, Warsaw (WAW)

Checked on 11th Sept., more than two weeks ahead of departure.

Going Out

1 Adult at 199,00 PLN 199,00 PLN

Fixed Passenger's Charge 99,00 PLN

Coming Back

1 Adult at 159,00 PLN 159,00 PLN

Fixed Passenger's Charge 99,00 PLN

Total 556,00 PLN (149 EUR).

Summary - of price examples

The table below summarises the price example provided

Table 22 Summary of price examples

Carrier	Route	PLN, min.	EUR, min.	DKK
SAS	Gdansk - Copenhagen, return	865	232	1732
SAS	Warsaw - Copenhagen, return	652	175	1305
LOT	Warsaw - Copenhagen, return	648	174	1298
Wideroe	Oslo - Bornholm, return, high season	625	168	1252
Centralwings	Warsaw - London Stansted	556	149	1113
Cimber Air	Wroclaw - Copenhagen, return	533	143	1067
Wideroe	Oslo - Bornholm, return, begin. season	506	136	1013
Ryanair	Warsaw-Dublin return, with payment fee	338	91	678
Norwegian	Warsaw - Copenhagen, return	229	62	459
Ferry, KZP	Kolobrzeg - Nexø, return (2* single)	220	59	441
Wizz Air	Warsaw-Malmö, return, with payment fee	181	49	363
Ferry, KZP	Kolobrzeg - Nexø, return, same day	160	43	320

Tour operators and travel agents

The largest Polish and foreign tour operators on the Polish market:

Poland's largest tour operator, PBP Orbis Travel, has maintained the leading position on the tour operators' market, mainly thanks to the fact that its domestic operations are increasingly significant.

The next largest are foreign wholesalers of tours: Scan Holiday, TUI Polska, Neckerman Polska, My Travel and Ecco Holiday. Some Polish operators, such as Triada, Itaka, Sindbad and Sigma Travel, have a secure position on the market, but they have had to significantly lower their margins.

Source: www.tourismtrade.org.uk/Images/Poland_Trade_tcm12-34401.pdf -- Cf. Also: www.tourismtrade.org.uk/NewsletterArticles/MarketingNewsOpportunities/NewsItems200506/PolandInsights2005.asp

- www.orbis.com.pl/
- www.scanholiday.pl/
- www.tui.pl/
- www.neckermann.pl/ (Thomas Cook)
- www.eccoholiday.com
- www.triada.pl/
- www.itaka.pl/
- www.sindbad.pl/ (TUI)
- www.sigma-travel.com.pl/

MyTravel – is no longer on the Polish market, and MyTravel has been taken over by Thomas Cook.

Orbis is oriented towards incoming tourism to Poland.

SIGMA TRAVEL

ul. Marszałkowska 140

00-061 Warszawa

biuro@sigma-travel.com.pl

Sigma Travel has bus tours to Scandinavia, with a focus on the three capitals and the Norwegian Fjords. Sigma has 6 bus tours, each lasting 10 days, of which 3 tours from Gdansk, 3 tours from Gdynia.

Table 23 Top 10 Tour operators in Poland 2006

Tabela 10. Podstawowe dane charakteryzujące czołowych operatorów turystycznych w Polsce

Wyszczególnienie	Liczba klientów w 2005 r. (tys.)	Liczba klientów 2006 r. (tys.)	Dynamika	Liczba biur własnych	Liczba agentów
Triada	152	162	*106,6%*	49	713
TUI Polska	110	130	*118,2%*	50	400
Neckermann	94	123	*130,9%*	16	400
Exim Tours	76	80	*105,3%*	13	3 000
Itaka	65	75	*115,4%*	43	600
Rainbow Tours	60	72	*120,0%*	22	850
Alfa Star	53	72	*135,8%*	1	2 500
Ecco Holiday	50	60	*120,0%*	4	3 000
Oasis Tours	35	52	*148,6%*	16	1 500
Orbis Travel	bd	50		43	1 600

Źródło: Prospekt emisyjny, obliczenia własne

Source:
www.polonia.com.pl/down/Prospekt%20emisyjny%20RAINBOW%20TOURS%20SA/Rainbow_raport_analityczny.pdf

Or: www.bankier.pl/static/att/34000/1635550_Rainbowraportanalityczny.pdf

Table 24 Twelve tour operator brands in Poland:

Alfa Star	GTI	Itaka	Jet Touristic	Neckermann	Orbis
Pegas	Rainbow	Scan Holiday	Triada	Tui	Wezyr

Source: www.lexan.pl/biuro_podrozy_dok/karta_agenta.pdf

Table 25 Top 10 tour operators in Poland 2005

Tabela. Podstawowe dane charakteryzujące czołowych operatorów turystycznych w Polsce

	Liczba klientów w 2005 r. w tys.	Przychody w 2005 r. w mln zł	Zmiana do 2004 r. w %	Zysk netto w 2005 r. w mln zł	Zmiana do 2004 r. w %	Przychody w I pół. 2006 r. w mln zł	Zysk netto w I pół. 2006 r. w mln zł	Zatrudnienie na koniec 2005 r.
Orbis Travel*	1.100	686	4,9	1,1	-24,3	b.d.	b.d.	543
Triada	152	183	-14,4	0,5	-75,2	49	-1,1	146
TUI Polska	110	230	24,3	b.d.	b.d.	b.d.	b.d.	171
Neckermann	94	188	17,5	10,9	47,3	b.d.	b.d.	90
Exim Tours	76	b.d.	b.d.	b.d.	b.d.	b.d.	b.d.	86
Itaka	65	b.d.	b.d.	b.d.	b.d.	b.d.	b.d.	100
RAINBOW TOURS	**60**	**82**	**32**	**1,1**	**162**	**37**	**0,2**	**63**
Alfa Star	53	88	8,7	0,02	-98,3	51	1,8	26
Ecco Holiday	50	100	b.d.	1	25	b.d.	b.d.	140
Oasis Tours	35	54	22,6	b.d.	b.d.	14	b.d.	32

Źródło: http://www.eximtours.com.pl/page_nagrody.html na dzień 20.04.2007 r.

** Orbis Travel zajmuje się sprzedażą organizowanych przez siebie wycieczek, sprzedażą agencyjną, sprzedażą ubezpieczeń i biletów lotniczych*

http://bossa.pl/analizy/emisje/2007/emisje/rainbow/Prospekt_Emisyjny_Rainbow_Tours.pdf (291 pages)

Table 26 Tour operators and major travel agents in Poland

Agencje turystyczne i touroperatorzy

Firma	Prezes/właściciel	Adres	Telefon/faks	E-mail	Strona WWW
5 Stars Club International	Paweł Muszyński – dyr. generalny	02–626 Warszawa al. Niepodległości 69 Budynek BTC	022 322 71 50–52 faks 022 322 76 56	5stars@5star.com.pl	www.5stars.com.pl
Almatur Polska BPiT	Mirosław Sikorski	00–359 Warszawa ul. Kopernika 15	022 826 26 39 faks 022 827 08 16	office@almatur.pl	www.almatur.pl
AQUASPORTS Nurkowe Biuro Podróży	Anna Sośnierz	00–517 Warszawa ul. Marszałkowska 76	022 596 37 22 faks 022 596 37 23	nurkowanie@aquasports.pl	www.aquasports.pl
DAMIS Travel	Paweł Wójcik – dyr. biura	03–905 Warszawa ul. Francuska 47	022 616 18 74 76 faks 022 616 03 69	turystyka@travel.damis.pl	www.travel.damis.pl
Fly Away Travel	Bartłomiej Budzyński – dyrektor	02–402 Warszawa ul. Przyłęcka 26	022 332 77 77 faks 022 332 77 00	sekretariat@flyaway.pl	www.flyaway.pl
Gromada OST	Roman Budzyński	00–353 Warszawa ul. Cicha 7	tel./faks 022 826 41 25	ctz@gromada.pl	www.gromada.pl
Grupa Traveligo	Bartosz Nowik	04–031 Warszawa ul. Wzorcowa 25	infolinia 0801 407 406 022 517 16 00–10	rezerwacje@traveligo.pl	www.traveligo.pl
GTI Travel & Charters	Sławomir Szulc – dyr. generalny	00–679 Warszawa ul. Wilcza 66/68	022 627 11 60 faks 022 626 96 80	gti@gtitravel.pl	www.gti-travel.pl
HAPPY HOLIDAY TRAVEL	Małgorzata Kaszuba Marek Kaszuba	00–043 Warszawa ul. Czackiego 3/5	022 826 28 21 faks 022 826 23 00	happy@htravel.com.pl	www.happyholidaytravel.com.pl
Holiday Travel	Ryszard Cetnarski	00–653 Warszawa ul. Nowowiejska 10	022 825 95 01 022 825 64 05–06	info@holidaytravel.pl	www.holidaytravel.pl
Neckermann Polska	Krzysztof Piątek	00–182 Warszawa ul. Dubois 9	022 536 98 98 faks 022 635 96 94	bp@neckermann.pl	www.neckermann.pl
Nowa Itaka Główny salon firmowy w Warszawie	Mariusz Jańczuk Leszek Szagdaj	45–057 Opole ul. Ozimska 9–11 00–533 Warszawa ul. Mokotowska 65	077 44 29 202 faks 077 44 29 203 022 622 10 10	info@itaka.pl	www.itaka.pl
Oasis Tours	Zied Zghal	00–019 Warszawa ul. Złota 11	022 501 94 94 faks 022 622 38 93	oasistours@oasistours.com.pl	www.oasistours.com.pl
RAINBOW TOURS	Grzegorz Baszczyński	90–361 Łódź ul. Piotrkowska 270	042 680 38 80 faks 042 680 38 89–90	lodz@rainbowtours.pl	www.rainbowtours.com.pl
Scan Holiday	Fritz Baumgartner	02–672 Warszawa ul. Wołoska 7	022 874 36 94	office@scanholiday.com.pl	www.scanholiday.pl
Sports-Tourist	Krzysztof Góralczyk	00–514 Warszawa ul. Marszałkowska 84/92	022 813 23 86 022 629 47 55	sports@sports-tourist.com.pl	www.sports-tourist.com.pl
TRIADA	Piotr Zawistowski Marek Markiewicz Maciej Truskolaski	00–695 Warszawa ul. Nowogrodzka 42	022 622 33 22	triada@triada.pl	www.triada.pl
TUI Poland	Fritz Baumgartner	02–672 Warszawa ul. Wołoska 7	022 874 36 94	office@tui.pl	www.tui.pl

Source: http://www.ow.com.pl/numery/ow_1_2007/str_36_38.pdf

Table 27 Tour operators – mainly in Warsaw

Name	City	Website
5 Stars Club International	Warsaw	www.5stars.com.pl
Almatur Polska BPiT	Warsaw	www.almatur.pl
AQUASPORTS	Warsaw	www.aquasports.pl
DAMIS Travel	Warsaw	www.travel.damis.pl
Fly Away Travel	Warsaw	www.flyaway.pl
Gromada OST	Warsaw	www.gromada.pl
Grupa Traveligo	Warsaw	www.traveligo.pl
GTI Travel & Charters	Warsaw	www.gti-travel.pl
HAPPY HOLIDAY TRAVEL	Warsaw	www.happyholidaytravel.com.pl
Holiday Travel	Warsaw	www.holidaytravel.pl
Neckermann Polska	Warsaw	www.neckermann.pl
Nowa Itaka	Opole	www.itaka.pl
Oasis Tours	Warsaw	www.oasistours.com.pl
RAINBOW TOURS	Lodz	www.rainbowtours.com.pl
Scan Holiday (TUI)	Warsaw	www.scanholiday.pl
Sports-Tourist	Warsaw	www.sports-tourist.com.pl
TRIADA	Warsaw	www.triada.pl
TUI Poland	Warsaw	www.tui.pl

Source: http://www.ow.com.pl/numery/ow_1_2007/str_36_38.pdf

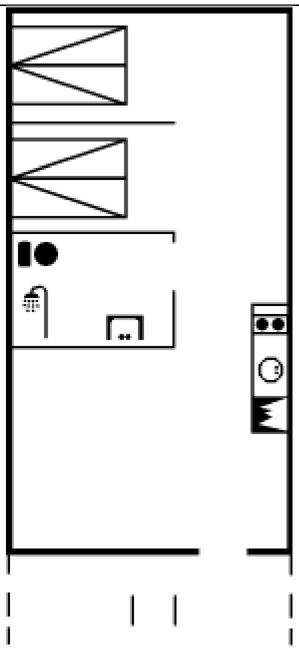
TUI Poland

Figure 39 www.tui.pl

TUI Polska offers package tours by charter flights to Southern Europe and holidays by scheduled flights to many other parts of the world including the Caribbean, South America, Africa, the Middle and Far East. Apparently there are no offers to Northern European destinations at all.

However, TUI in Germany, Wolters Reisen, has over 100 holiday cottages and apartments in its programme, actually the same houses which are offered by the Danish brand Sol & Strand, www.sonneundstrand.com. Prices start at EUR 235 for an apartment for four people.

Figure 40 TUI in Germany – Wolters Reisen, has got plenty of accommodation offers on Bornholm



Beschreibung: Ferienhaus in Åkirkeby
Diese gut eingerichtete Ferienwohnung in einem Steinreihenhaus, 1970 gebaut und 2005 renoviert, liegt am Stadtrand von Åkirkeby, nur 500 m vom Erlebniscentrum NaturBornholm entfernt. Offene Terrasse mit Gartenmöbeln. Innen gibt es Holzböden, Steinwände und Gipsdecken - alles in hellen und freundlichen Farben. Die Wohnung ist mit Badezimmer mit Dusche eingerichtet. Kombinierte Küche und Wohnzimmer mit u. a. TV mit Gemeinschaftsantenne, Stereoanlage mit CD-Spieler, DVD-Spieler sowie Zutritt zur Terrasse. Die Schlafplätze verteilen sich auf 2 Zimmer mit Doppelbett. Die Wohnung liegt auf einem Gemeinschaftsgelände mit Außenswimmingpool (20x10x0,7-1,8 m) und Spielplatz mit Schaukel. Die weißen Sandstrände aus Südbornholm liegen nur 8 Km von der aktiven Stadt Åkirkeby entfernt.

Alle Gebührenangaben ohne Gewähr

Source: www.tui.com/WOT, boh25002 Åkirkeby, Dänemark Drucken

Scan Holiday – now a TUI brand - offers package holidays to:

- Greece: Calkidiki (peninsula), Corfu, Crete, Peloponez (peninsula), Rhodes.
- Spain: Majorca, Gran Canaria, Teneriffe
- Turkey
- Egypt
- Tunesia.

TUI restructures its business in the Polish source market [30]

Hanover/Warsaw, 17 June 2004.

TUI, Europe's leading travel group, is restructuring its business in the Polish source market. With effect from 01.01.2005, all the activities of the two travel agency brands TUI Polska Sp z o.o and Scan Holiday Sp z o.o will be bundled within one lead company. The new company called TUI Poland will be headquartered in Warsaw. The current head of TUI Polska, Fritz Baumgartner, will be the new CEO.

TUI Poland will pursue the same brand policy as the two tour operators: pack-age holidays in the medium to premium quality and price segments will be sold under the TUI brand. The Scan Holiday brand stands for package holidays in the medium to budget quality and price segments, and will be positioned more strongly then before as a low budget brand. This involves intensifying the pricing and further expanding the already strong direct sales (call centre) and high street retailing through travel agencies. "We are already very well positioned in the middle and premium segments with the TUI brand. We are now optimising our position in the budget segment by sharpening Scan Holi-day's profile," says Fritz Baumgartner. Plans also include centralising control over purchasing, planning and marketing. Staff at Scan Holiday Sp z o.o will receive job offers. The Scan Holiday headquarters in Posen will close in the first half of 2005. Scan managing director Anna Pradszinska takes over a senior position at TUI Poland.

With a 16 per cent market share and around 100 000 customers in 2003, TUI Poland is the market leader in the Polish package tour market. Following a period of market consolidation, experts are again predicting above average growth of eight to 15 per cent per year in air-inclusive package holidays. A turnover of around Euro 50 million was generated in the 2003 financial year.

This press release is also posted at www.tui.com

Mario Köpers, Telephone +49(0)511 566-1489

16 percent = 100.000 air-inclusive package holidays, 2003.

100 percent = 625.000 packages.

1.250.000 charter passengers in 2003.

"TUI Poland sold more holidays in 2004 than in 2003 and consolidated its market position."[31]

[30] www.tui.pl/strony/50891.php
[31] TUI Group, annual report 2005, www.tui-group.com.

“In Poland, demand in the travel market grew again thanks to strong economic growth. TUI Poland sold more tours than in 2005 and consolidated its market position.”[32]

Since TUI in Germany, specifically Wolters Reisen, have already contracted with as many as 13 accommodations on Bornholm, it would be very easy for TUI Poland to utilise the same accommodation offers.

Table 1 13 hotels on Bornholm, online bookable at www.tui-ferienhaus.de

Hotel	TUI Stars	Nights	Weekly offers
Hotel Hammersø in Sandvig	3,5	Yes	Yes
Hotel Klintely in Sandkås	2,5	Yes	Yes
Pension Koch in Gudhjem	3,0	Yes	Yes
Hotel Balka Söbad in Balka	2,5	Yes	Yes
Hotel Romantik in Sandvig	3,5	Yes	Yes
Dueodde Badehotel in Dueodde	4,0		Yes
Pension Langebjerg in Sandvig	2,5	Yes	
Pension Slægtsgården in Allinge	2,5	Yes	
Hotelpension Snogebæk in Snogebæk	2,5	Yes	
Hotel Balka Strand in Balka	4,0	Yes	
Hotel Skovly in Rønne	2,5	Yes	
Hotel Byskrivergården Garni in Allinge	2,5	Yes	
Hotel Friheden in Sandkås	3,0	Yes	

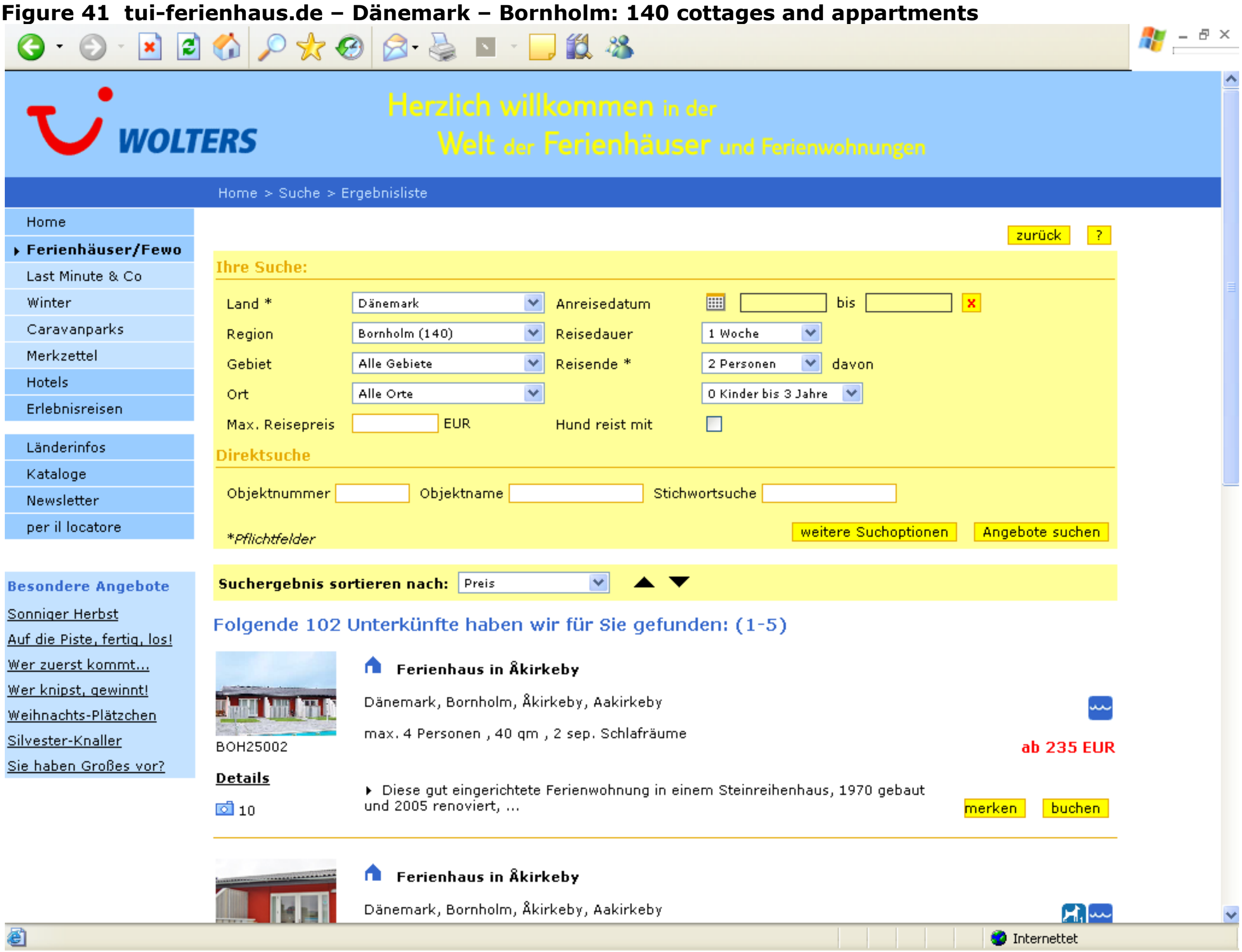
Source: www.tui-ferienhaus.de/hotels_daenemark.html, hereunder: Bornholm

It should be noted that it is not possible to complete a booking online with any of these accommodations with weekly offers for a stay in October. But it would probably be possible to book the weekly offers by other communication channels such as email or telephone or fax.

Within the TUI Group, Wolters has 140 holiday cottages on Bornholm, the same houses as Sol & Strand.

[32] www.tui-group.com/en/ir/reports/gb_2006/divisions/tourism.html

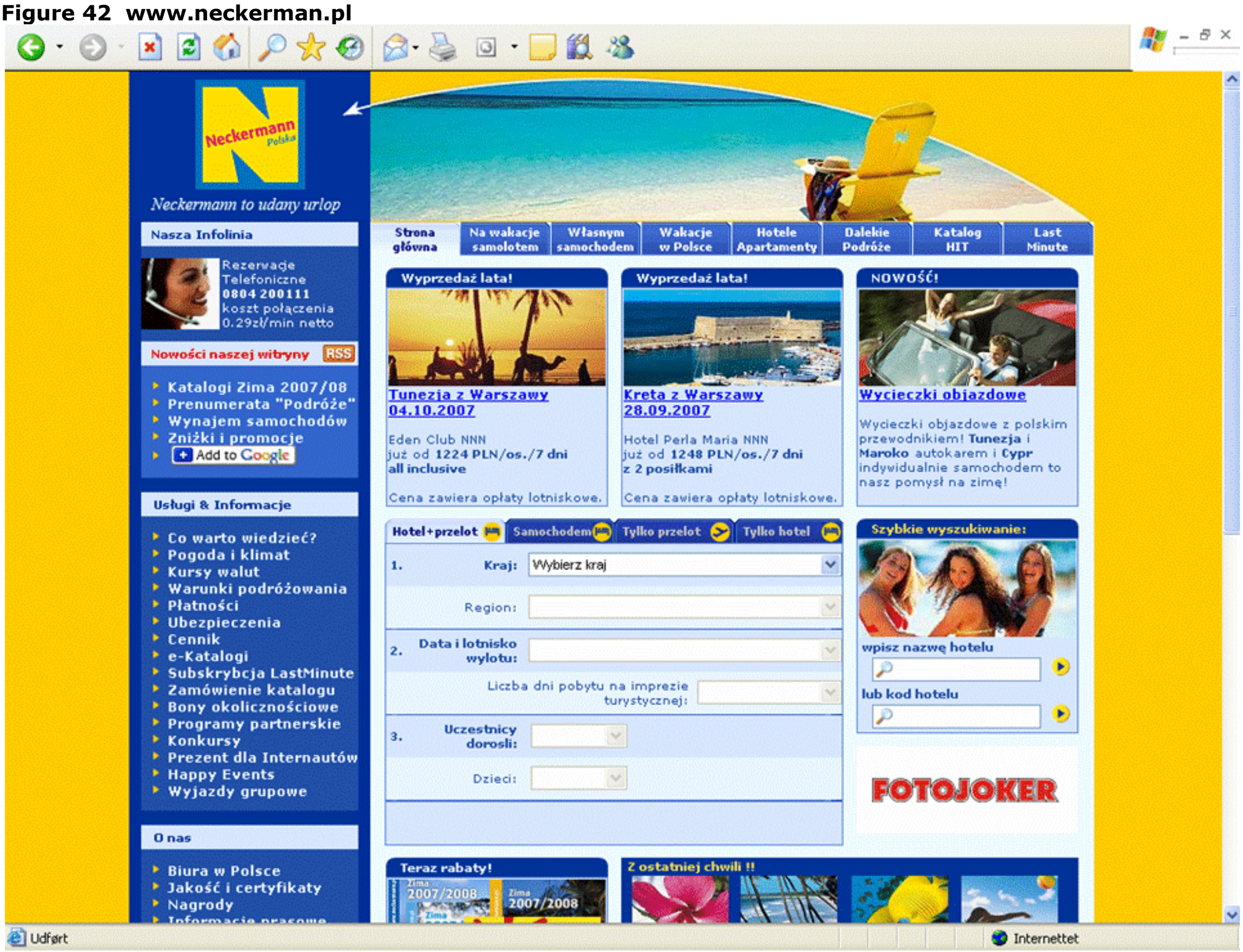
Figure 41 tui-ferienhaus.de – Dänemark – Bornholm: 140 cottages and appartments



Source: http://www.tui-ferienhaus.de, Dänemark, Bornholm

Neckerman Polska

Figure 42 www.neckerman.pl



<table border="1"><tr><td>

■ Poland

Neckermann Poland beat its record result of the previous year by more than 60 percent in the financial year under review and the company's market position was significantly enhanced as a result. The number of customers rose by 20 percent, utilisation of flight capacity in the case of the brochure brand increased while the last-minute share declined. Thanks to the expansion of the volume brand Hit in the tour operator sector and the growth of the online distribution channel into a comprehensive leisure travel portal, the 2004/2005 financial year saw the cornerstone put in place for a further strengthening of the company's market position in the future.

</td></tr></table>

Source: www7.thomascook.de/tck/downloads/Geschaeftsbericht_0405_ThomasCookAG_english.pdf

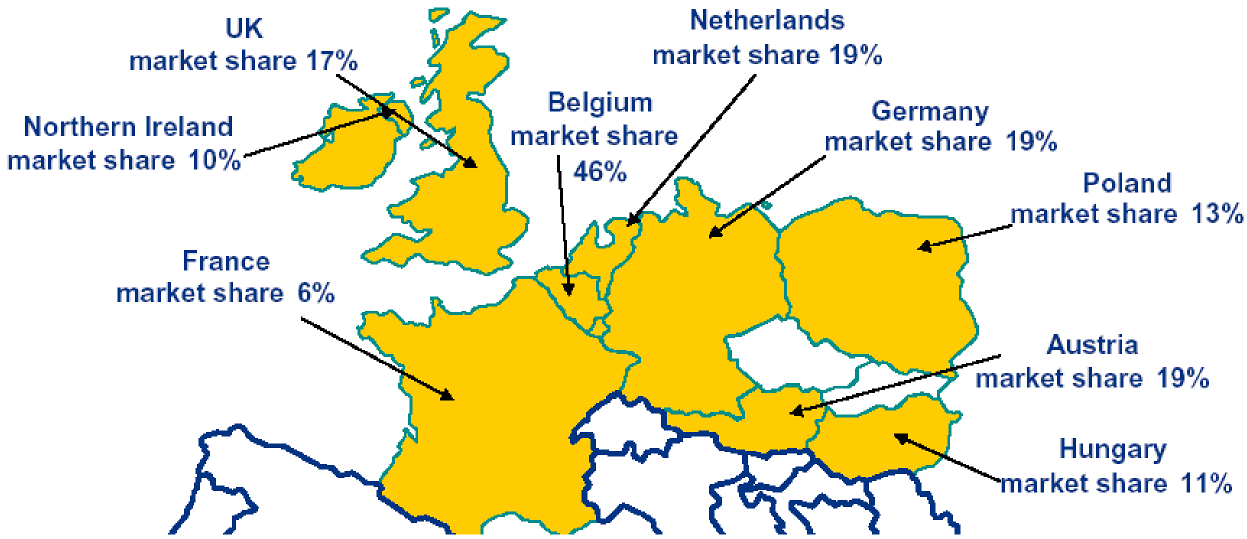
Table 28 Thomas Cook in Poland (2005/2006)

• Sales	50.2 million Euro
• Customers	102,049
• Travel agencies	35
• Of which own	16
• Franchise	19
• Employees	80
• Tour operators	10
• Travel agencies	43
• Other	27

Location

Source: www6.thomascook.de/tck/downloads/Company_Portrait_2007.pdf

Figure 43 Thomas Cook AG is the no. 2 in Europe and the thirdlargest leisure travel group worldwide



Source: www6.thomascook.de/tck/downloads/Company_Portrait_2007.pdf

Thomas Cook has a 13% market share in Poland.

Figure 44 Thomas Cook about the Polish market (box) – 2006 (1 Nov. 2005 – 31 Oct. 2006).

◆ Poland

Thanks to the good state of the economy, the industry developed positively. Growth was about 5.5 percent. Despite the positive development, there were some spectacular failures in the 2005 / 06 business year: operator Open Travel and the airline Fischer Air both filed for bankruptcy.

Thomas Cook Poland grew considerably faster than the market. The Neckermann brand achieved a turnover of 50.2 million euros – up 45.8 percent. The number of guests increased by 40.3 to more than 100,000. The most popular summer destinations were Crete and Majorca, and the Salzburger Land, the Dolomites and Slovakia for winter. The launch of the "Hit-Preisknüller" discount offer went well and increased the demand for short- and medium-haul holidays.

The stationary sales network was developed further. Online sales through www.neckermann.pl and www.kataloghit.pl developed very well. Charter business in Poland is largely determined by Centralwings, a subsidiary of the national airline LOT. Attempts by the competition to establish themselves on the charter market failed. By contrast, the low-cost carriers recorded extraordinary growth of almost 100 percent.

Source: www6.thomascook.de/tck/downloads/BPK2007_Annual_Financial_Report.pdf

Triada

Figure 45 www.triada.pl

TRIADA Biuro Podróży Sp. z o.o.

ul. Nowogrodzka 42

00-695 Warszawa

tel. +48 22 33 33 999

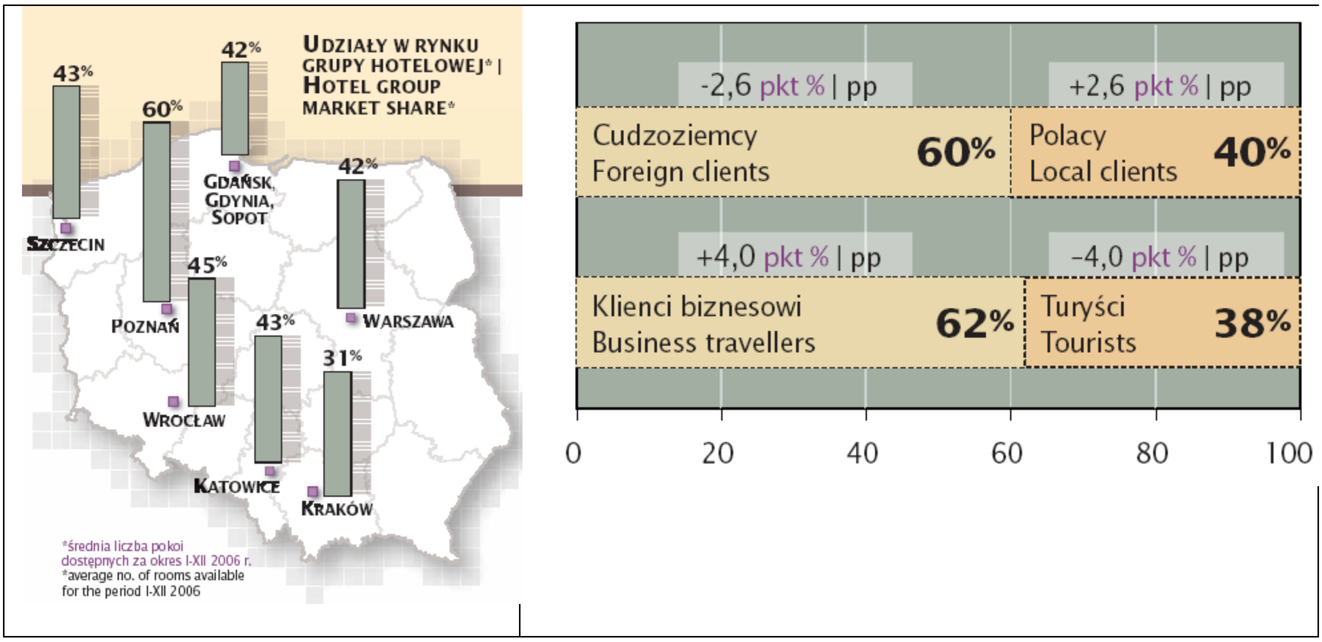
fax +48 22 33 33 903

e-mail: triada@triada.pl

Orbis Travel

Figure 46 www.orbis.com.pl

Table 29 Room night sales structure – Orbis hotels



- "Orbis Travel is the largest Polish incoming tourist and the fourth largest outgoing tour-operator".[33]
- "Orbis Travel is the largest and best known Polish tour operator with a universal service profile. A sales network including 42 branches owned by the company and over 1600 agents provides a widely accessible and efficient service."[34]
- "Orbis Transport is the largest Polish international coach operator, with services to over 100 cities in Europe."

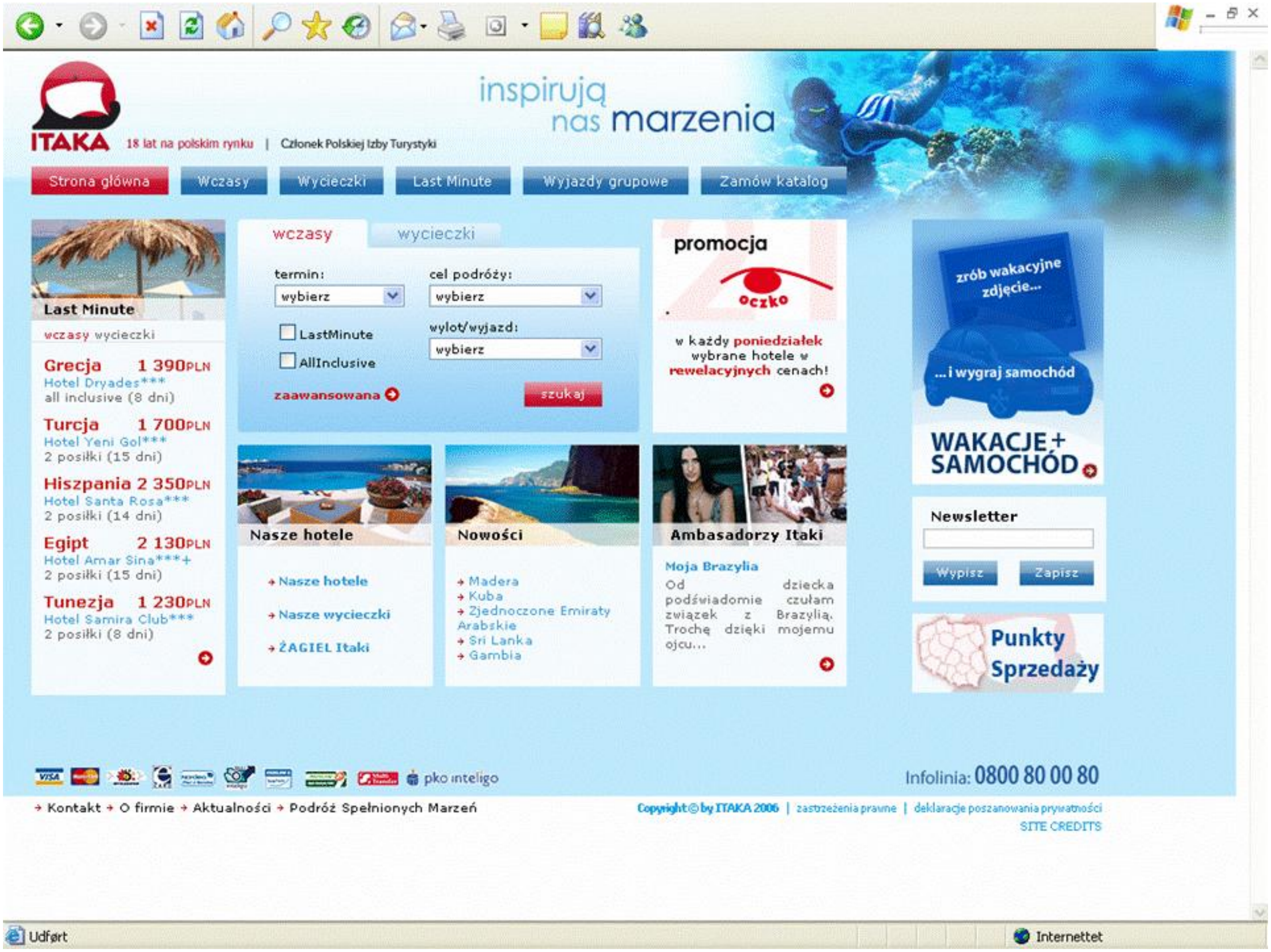
[33] Orbis, Annual Report 2006, www.orbis.pl/ir/pliki/Publiczne/raporty_roczne/rap_2006.pdf
[34] http://www.orbis.pl/ir/pliki/Publiczne/raporty_roczne/rap_2006.pdf

Orbis Travel is the largest Polish tourist office organising visits to Poland, and one of the leading tour operators offering holidays abroad and at home. It offers a full range of holiday and travel services aimed at corporate and individual clients. In 2006, Orbis Travel strengthened its position in the implementation of its Business Travel Service program. In 2006, Orbis Travel provided services for 2000 companies and institutions on the basis of general co-operation agreements.

The company has a sales network including 42 of its own sales outlets located in the largest Polish cities and a network of 1600 agents.

1.2 MILLION CLIENTS USED THE SERVICES OF ORBIS TRAVEL IN 2006

Itaka


inspirują nas marzenia
ITAKA
18 lat na polskim rynku | Członek Polskiej Izby Turystyki
Strona główna
Wczasy
Wycieczki
Last Minute
Wyjazdy grupowe
Zamów katalog
Last Minute
wczasy wycieczki
Grecja 1 390PLN
Hotel Dryades***
all inclusive (8 dni)
Turcja 1 700PLN
Hotel Yeni Gol***
2 posiłki (15 dni)
Hiszpania 2 350PLN
Hotel Santa Rosa***
2 posiłki (14 dni)
Egipt 2 130PLN
Hotel Amar Sina***+
2 posiłki (15 dni)
Tunezja 1 230PLN
Hotel Samira Club***
2 posiłki (8 dni)
wczasy
wycieczki
termin:
wybierz
cel podróży:
wybierz
LastMinute
AllInclusive
wylot/wyjazd:
wybierz
zaawansowana
szukaj
promocja
oczko
w każdy poniedziałek wybrane hotele w rewelacyjnych cenach!
zrób wakacyjne zdjęcie...
...i wygraj samochód
WAKACJE + SAMOCHÓD
Nasze hotele
Nasze hotele
Nasze wycieczki
ŻAGIEL Itaki
Nowości
Madera
Kuba
Zjednoczone Emiraty Arabskie
Sri Lanka
Gambia
Ambasadorzy Itaki
Moja Brazylia
Od dziecka podświadomie czułam związek z Brazylią. Trochę dzięki mojemu ojcu...
Newsletter
Wypisz
Zapisz
Punkty Sprzedaży
pko inteligo
Infolinia: 0800 80 00 80
Kontakt
O firmie
Aktualności
Podróż Spełnionych Marzeń
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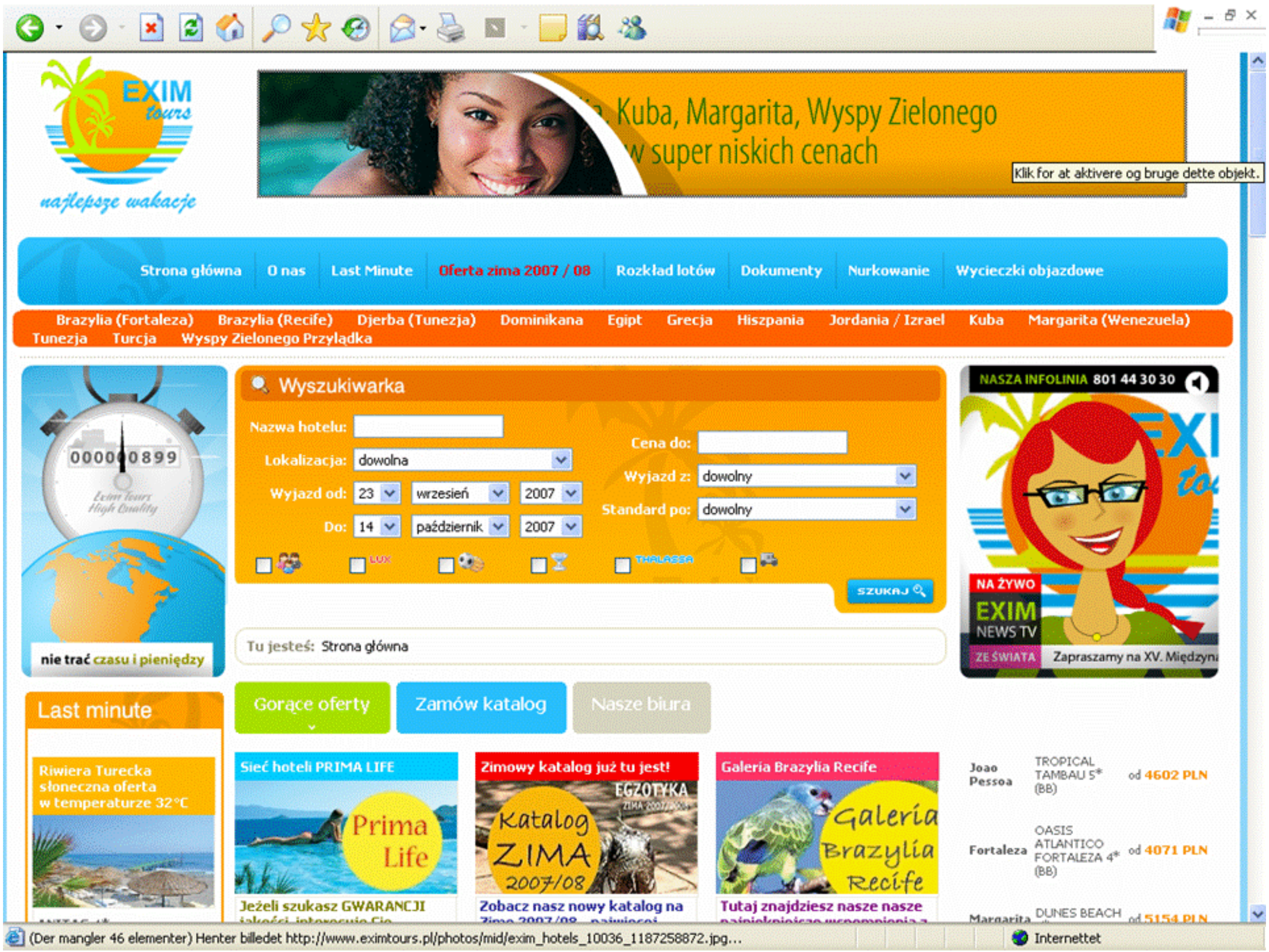


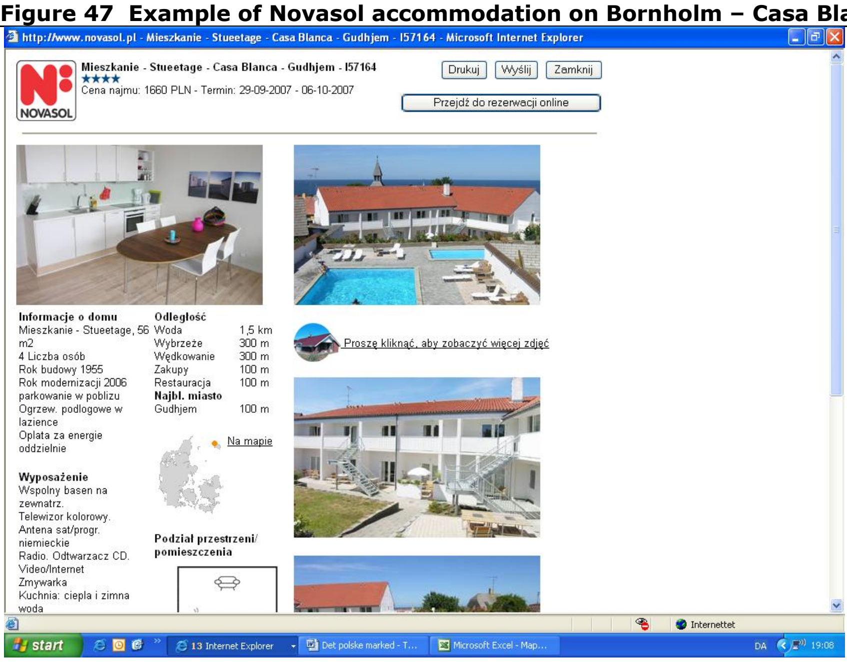
Novasol – a Danish cottage letting agency with website and catalogue in Polish

Danish holiday cottage letting agencies with website in Polish language:

- Novasol: Yes, in Polish
- Dansommer.dk Not in Polish
- Dancenter.dk: Not in Polish
- Sologstrand.dk: Not in Polish
- Feriepartner.dk Not in Polish

Novasol was present at the TT Warsaw fair in September 2007.

Figure 47 Example of Novasol accommodation on Bornholm – Casa Blanca, Gudhjem



A-Sezon 3480 PLN	14-7-2007 - 4-8-2007
B-Sezon 3320 PLN	7-7-2007 - 14-7-2007 4-8-2007 - 11-8-2007
C-Sezon 2740 PLN	30-6-2007 - 7-7-2007 11-8-2007 - 25-8-2007 29-12-2007 - 5-1-2008
D-Sezon 2155 PLN	16-6-2007 - 30-6-2007 25-8-2007 - 1-9-2007

Cena (wg sezonu) (PLN)

A	B	C	D	E	F
3480	3320	2740	2155	1660	1275

Source: http://www.novasol.pl/

Figure 48 Example of Novasol accommodation on Bornholm – Ryttergaarden, Roenne

Source: http://www.novasol.pl/

Report of meetings with Tour Operators and Travel Agencies at TT Warsaw Tour & Travel 2007 – by Jagna Noren

After meetings and follow up telephone conversations with major tour operators in Poland and several smaller travel agencies, the overall conclusion is that Bornholm is a destination with growing interest among Polish tourists. Words such as "trendy" and "modern" were used to describe the interest in Bornholm.

As an answer to the question "How do we get more Polish tourists to Bornholm?", the advice was to make an effort to promote Bornholm in a larger scale with a focus on:

- perfect conditions for bicycle vacation,
- the fact that almost all Scandinavian landscapes are represented on the island,
- the fact that there are efforts to preserve the regional identity and culinary heritage at Bornholm, which results in a genuine experience of the island,
- the silence, peace of mind and stress-less way of living,
- handicraft, etc.

As an answer to the question "How do we get Polish tourists to stay longer at Bornholm?", the responses focused on Scandinavia's reputation for offering very expensive accommodations, making it difficult to make the Polish tourists stay longer. Marketing, special offers etc. should have Polish tourists in mind for April, May, June, mid August and September when accommodation costs on Bornholm are less expensive.

We should also be aware of special Polish holidays. For example in the last days of April there are some days off in Poland, therefore people only need to take 2-3 days off from work to get a whole weeks' vacation. In general summer holiday at primary schools starts on the first Friday after the 18th of June and lasts until the end of August.

Winter holiday at primary school lasts for two weeks, starting in January and ends at the end of February. High school and university students have their summer vacation from July to October.

As a result of above mentioned interviews and advises Bornholm plans to arrange a study tour to Bornholm, preferably latest in November 2007, for major tour operators on the Polish market. Invited tour operators would represent approx. 80% of the Polish tourism market. Becoming a product in their offers, as soon as possible, will help to promote Bornholm widely and increase the existing interest in Bornholm. It is probably too late to include Bornholm in catalogues for 2008, but Bornholm could be offered on tour operator's home pages. The planned study tour should include a general guided tour around Bornholm as an introduction to the island. One day the focus should be on meetings with potential co-operation partners (hotels, holiday houses, camping, etc.) and transportation companies that bring Polish tourists to the island (Polferries, Bornholmstrafikken, KZP, Zegluga Gdanska). A 5-10 minute presentation of each participant might be helpful to get an efficient and result-oriented day.

There are plans and actions to arrange a tour to Bornholm for the Polish press in the beginning of April 2008, to ensure Bornholm a solid position in a very competitive tourism industry.

Conclusion -- Summary

There are several airlines which could fly between Poland and Bornholm:

- Scheduled airlines, with one or more airplanes stationed in Poland
- Scheduled airlines, with bases in Scandinavia
- Charter airlines, with small/medium sized airplanes in Poland or Scandinavia

Scheduled airlines with one or more airplanes stationed in Poland include the LOT and several low cost airlines (LCCs): Centralwings, Wizz Air, and Norwegian Air Shuttle. Skyeurope is scaling down in Poland. All the LCC have got rather large airplanes with seat capacity from 145 to 180 whereas LOT has got medium-sized planes as well, for example ATR42 with 46 seats.

There are also airlines based in Denmark as well as in Norway and in Sweden that could potentially serve a summer route between Poland and Bornholm. Currently, SAS has three routes to/from Poland (Gdansk, Warsaw, Poznan), Cimber (Wroclaw, and operate the Poznan route for SAS, using a 50 seat jet plane) and Sterling (Crakow). Additional airlines include DAT and Skyways. Wideroe, a SAS subsidiary, opened a summer route from Oslo to Bornholm in 2007, using DASH8-300 with 50 seats.

Finally, a summer airline route from Poland to Bornholm could be based on some kind of charter arrangement. Eurolot and WEA are examples of airlines chartering out small/medium sized airplanes. It should be stressed that all three current summer routes to Bornholm are scheduled routes, not charter flights. In connection with such a charter option tour operators become crucial.

Top tour operators such as TUI, Neckerman and one more, would need to take about 15 seats each on a 46 passenger airplane for such a charter arrangement to get started.

Alternatively, a big jet aircraft with at least 145 passengers could be employed in a combined scheduled and charter flight. In this case anything from 50 to 100 seats or more would need to be “guaranteed” by the tour operators. Thus no matter whether it is a small/medium-sized aircraft with 46 seats or a big aircraft with 145 seats or more, at least 46 seats needs to be guaranteed.

Transport by air from Poland to Bornholm can only be a small supplement to the transport of persons and cars by ferries. In Germany around 90.000 passengers are transported by ferry, and on top of this come 1% by air (first year, 2007). For Poland, it could be 60.000 passengers by sea, and with a 46 seat passenger plane it could be 600 passengers by air, first year (300 each way). With about 80% seat load factor, it would mean 8 rounds. In comparison Lufthansa puts in 12 roundtrips with a 50 seat jet plane on Saturdays and Wideroe did 14 roundtrips during 7 weeks on Thursdays and Sundays.

In the case of a big jet plane from Poland to Bornholm, the prices per seat would be considerably lower than on the small/medium-sized planes with about 50 seats. Apart from the tour operator sales, with the right low prices, the seat only sales could be considerable. All the sales by Lufthansa and Wideroe were seat only. In Poland and other countries all the sales of the Low Cost Carriers are seat only with a few exceptions. Thus Centralwings of Poland has considerable charter business and Wizzair has a couple of pure charter flights (to Bulgaria and Cos).

In the area of sea-based transport Poland-Bornholm, there should be opportunities to further develop the traffic even based on existing ships. At the moment four ships service the routes between Poland and Bornholm: Jantar, Lady Assa, Bornholm Express (all Nexø), and Pomerania sail to Rønne. Furthermore Poles can make use of the ferries from Bornholmstrafikken, sailing from Sassnitz to Rønne.

There should be possibilities to develop one day trips, car based traffic, and bus based traffic (with or without busses carried across). Also the feeder lines with the trains to Kolobrzeg and Swinoujicie could be further developed.

The two most important fairs in Poland with respect to promoting holidays to Bornholm is Tour Salon in Poznan in October and TT Warsaw in September.

If a new car ferry is build, it is suggested that it should serve both Poland and Germany, in the summer mainly or only Poland and in the winter with an emphasis on Germany.

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Enclosures

Enclosure A. Weekly flights to/from Gdansk Airport

NEW SCHEDULED CONNECTIONS FROM GDANSK AIRPORT

IN THE FLIGHT TIMETABLE FOR SUMMER 2007

PASSENGER

CITY	WEEKLY	AIRLINE
RONNEBY (RNB)	3	BLEKINGEFLYG

SCHEDULED CONNECTIONS FROM GDANSK AIRPORT

IN THE FLIGHT TIMETABLE FOR SUMMER 2007

PASSENGER

CITY	WEEKLY	AIRLINE
COLOGNE/BONN (CGN)	3	WIZZAIR
COPENHAGEN (CPH)	19	SAS
CORK (ORK)	3	WIZZAIR
DONCASTER-SHEFFIELD (DSA)	4	WIZZAIR
DORTMUND (DTM)	7	WIZZ AIR
DUBLIN (DUB)	3	CENTRALWINGS
DUBLIN (DUB)	2	RYANAIR
EDINBURGH (EDI)	3	CENTRALWINGS
FRANKFURT (FRA)	14	LOT
FRANKFURT HAHN (HHN)	4	RYANAIR
GLASGOW-PRESTWICK (PIK)	3	WIZZAIR
HAMBURG (HAM)	7	LOT
HAMBURG-LUBECK (LBL)	4	WIZZAIR
HELSINKI (HEL)	4	FINNAIR
LIVERPOOL (LPL)	3	WIZZAIR
LONDON LUTON (LTN)	11	WIZZ AIR
LONDON STANSTED (STN)	7	RYANAIR

MALME-STURUP (MMX)	3	WIZZAIR
MUNICH (MUC)	7	LOT
MUNICH (MUC)	13	LUFTHANSA
OSLO (OSL)	3	NORWEGIAN
ROME (CIA)	3	CENTRALWINGS
SHANNON (SNN)	2	CENTRALWINGS
STOCKHOLM-SKAVSTA (NYO)	3	WIZZ AIR
WARSAW (WAW)	51	LOT

Source: Gdansk Airport

Enclosure B. Passenger transportation in regular air traffic by airlines in 2006 and Q1.2007

Passenger transportation for regular air traffic in accordance to actual airline figures in 2006.

See next page.

The coloumn shows:

- Rank by number of passengers 2006
- Name of airline
- Number of passengers 2006
- Share of passengers 2006
- Number of passengers 2005
- Share of passengers 2005
- Increase in percent, 2005-2006.
- Change in percentage point share 2005-2006.

Source: www.pata.pl/pliki/lotnictwo_cywilne/Liczba_pasazerow_w_latach_2005_2006.pdf

Passenger transportation in regular air traffic in accordance to actual airline figures in the first quarter of 2007.

See following pages.

The column shows:

- Rank by number of passengers Q1 2007
- Name of airline
- Number of passengers Q1 2007
- Share of passengers Q1 2007
- Number of passengers Q1 2006
- Share of passengers Q1 2006
- Number of passengers 2006
- Share of passengers 2006

Source: www.pata.pl/pliki/lotnictwo_cywilne/statystyki_I_kw_2007.pdf

Liczba odprawionych/przybyłych pasażerów w polskich portach lotniczych w ruchu regularnym według przewoźnika faktycznego w latach 2005 - 2006.

L.P.	NAZWA PRZEWOŹNIKA	Łącznie porty				zmiana liczby pax	zmiana udziału w pkt. %
		SUMA 2006	udział	SUMA 2005	udział		
1.	LOT POLISH AIRLINES	4 715 236	33,58%	4 517 449	43,81%	4,38%	-10,23%
2.	WIZZAIR	2 069 481	14,74%	1 237 574	12,00%	67,22%	2,74%
3.	RYANAIR	1 545 251	11,01%	260 583	2,53%	493,00%	8,48%
4.	CENTRALWINGS	1 055 434	7,52%	496 540	4,82%	112,56%	2,70%
5.	LUFTHANSA DEUTSCHE AIRLINES	706 103	5,03%	620 761	6,02%	13,75%	-0,99%
6.	SKYEUROPE	574 117	4,09%	472 389	4,58%	21,53%	-0,49%
7.	EASYJET	444 246	3,16%	416 081	4,04%	6,77%	-0,87%
8.	BRITISH AIRWAYS	291 390	2,08%	282 878	2,74%	3,01%	-0,67%
9.	GERMANWINGS	283 502	2,02%	201 300	1,95%	40,84%	0,07%
10.	AIR FRANCE	262 819	1,87%	209 757	2,03%	25,30%	-0,16%
11.	NORWEGIAN AIR SHUTTLE	258 034	1,84%	55 822	0,54%	362,24%	1,30%
12.	ALITALIA	235 316	1,68%	180 121	1,75%	30,64%	-0,07%
13.	SCANDINAVIAN AIRLINES SYSTEM	232 553	1,66%	259 003	2,51%	-10,21%	-0,86%
14.	AER LINGUS	232 307	1,65%	84 148	0,82%	176,07%	0,84%
15.	ROYAL DUTCH AIRLINES	209 595	1,49%	221 302	2,15%	-5,29%	-0,65%
16.	SWISS INTERNATIONAL AIR LINES	127 080	0,91%	85 135	0,83%	49,27%	0,08%
17.	AUSTRIAN AIRLINES	126 321	0,90%	123 569	1,20%	2,23%	-0,30%
18.	CZECH AIRLINES	99 850	0,71%	99 086	0,96%	0,77%	-0,25%
19.	MALEV HUNGARIAN AIRLINES	79 765	0,57%	63 036	0,61%	26,54%	-0,04%
20.	FINNAIR	73 921	0,53%	51 593	0,50%	43,28%	0,03%
21.	AEROFLOT	65 311	0,47%	59 045	0,57%	10,61%	-0,11%
22.	BRUSSELS AIRLINES	47 768	0,34%	45 803	0,44%	4,29%	-0,10%
23.	AIR EUROPA	45 591	0,32%	57 397	0,56%	-20,57%	-0,23%
24.	TURKISH AIRLINES	41 515	0,30%	32 950	0,32%	25,99%	-0,02%
25.	EL AL ISRAEL AIRLINES	24 246	0,17%	25 274	0,25%	-4,07%	-0,07%
26.	DIRECTFLY	22 812	0,16%	0	0,00%	-	0,16%
27.	AEROSFIT	22 448	0,16%	29 674	0,29%	-24,35%	-0,13%
28.	TUNIS AIR	19 186	0,14%	18 648	0,18%	2,89%	-0,04%
29.	BLUE 1	17 164	0,12%	0	0,00%	-	0,12%
30.	CIMBER AIR	15 848	0,11%	14 863	0,14%	6,63%	-0,03%
31.	HELIOS AIRWAYS	10 792	0,08%	19 734	0,19%	-45,31%	-0,11%
32.	SKYEXPRESS	9 968	0,07%	0	0,00%	-	0,07%
33.	AIRCRAFT MAINTENANCE COMPANY	9 926	0,07%	0	0,00%	-	0,07%
34.	ALPHAJET	9 554	0,07%	0	0,00%	-	0,07%
35.	STYRIAN	8 846	0,06%	22 835	0,22%	-61,26%	-0,16%
36.	STRELING	8 643	0,06%	0	0,00%	-	0,06%
37.	AIR BALTIC	7 811	0,06%	0	0,00%	-	0,06%
38.	BELAVIA	7 380	0,05%	9 916	0,10%	-25,57%	-0,04%
39.	JET 2	6 699	0,05%	0	0,00%	-	0,05%
40.	SUNEXPRESS	4 396	0,03%	0	0,00%	-	0,03%
41.	SKY AIRLINES	2 604	0,02%	0	0,00%	-	0,02%
42.	EUROCYPRIA AIRLINES LIMITED	2 102	0,01%	67	0,00%	3037,31%	0,01%
43.	LTE INTERNATIONAL AIRWAYS	2 084	0,01%	0	0,00%	-	0,01%
44.	ADRIA AIRWAYS	1 930	0,01%	1 163	0,01%	65,95%	0,00%
45.	AIR MEMPHIS	1 893	0,01%	0	0,00%	-	0,01%
46.	CONSULTAS	837	0,01%	0	0,00%	-	0,01%
47.	SUN D'OR INTERNATIONAL AIRLINE	398	0,00%	0	0,00%	-	0,00%
48.	SLOVAKAIR	373	0,00%	0	0,00%	-	0,00%
49.	CORSAIR	275	0,00%	0	0,00%	-	0,00%
50.	EAE	95	0,00%	2 250	0,02%	-95,78%	-0,02%
51.	AIR BERLIN GMBH	0	0,00%	9 079	0,09%	-100,00%	-0,09%
52.	AIR LITHUANIA	0	0,00%	1 432	0,01%	-100,00%	-0,01%
53.	DAUAIR	0	0,00%	5 190	0,05%	-100,00%	-0,05%
54.	LUX AIR	0	0,00%	7 418	0,07%	-100,00%	-0,07%
55.	MAERSK AIR	0	0,00%	8 918	0,09%	-100,00%	-0,09%
56.	NIKI	0	0,00%	542	0,01%	-100,00%	-0,01%
SUMA		**14 040 816**	**100,00%**	**10 310 325**	**100,00%**	**36,18%**	**0,00%**
LCCs*		***6 486 235***	***46,20%***	***3 234 058***	***31,37%***	***100,56%***	***14,83%***
Przewoźnicy polscy**		***5 803 450***	***41,33%***	***5 013 989***	***48,63%***	***15,75%***	***-7,30%***

*Przewoźnicy:AER LINGUS, AIR BERLIN GMBH, BLUE 1, CENTRALWINGS, EASYJET, GERMANWINGS, JET 2, NIKI, NORWEGIAN AIR SHUTTLE, RYANAIR, SKYEUROPE, WIZZAIR

**Przewoźnicy: LOT POLISH AIRLINES, CENTRALWINGS, DIRECTFLY, SKYEXPRESS

Uwaga: Dane nie uwzgledniają pasażerów w ruchu tranzytowym.

Źródło: Opracowanie ULC na podstawie informacji uzyskanych z portów lotniczych, Warszawa, Luty 2007

Liczba odprawionych/przybyłych pasażerów w polskich portach lotniczych w ruchu regularnym według przewoźnika faktycznego w I kwartałach lat 2005 - 2007

NAZWA PRZEWOŹNIKA	ŁĄCZNIE PORTY							
	Suma I kwartał 2007	Udział	Suma I kwartał 2006	Udział	Suma I kwartał 2005	Udział	Suma rok 2006	Udział
LOT POLISH AIRLINES	***1 119 468***	***32,64%***	***942 673***	***36,56%***	***946 950***	***48,98%***	***4 715 236***	***33,58%***
RYANAIR	515 972	15,04%	212 475	8,24%	2 800	0,14%	1 545 251	11,01%
WIZZAIR	495 761	14,45%	399 194	15,48%	226 213	11,70%	2 069 481	14,74%
CENTRALWINGS	188 643	5,50%	146 001	5,66%	9 980	0,52%	1 055 434	7,52%
LUFTHANSA DEUTSCHE AIRLINES	182 759	5,33%	124 948	4,85%	118 278	6,12%	706 103	5,03%
SKYEUROPE	131 726	3,84%	115 407	4,48%	98 624	5,10%	574 117	4,09%
EASYJET	118 546	3,46%	90 745	3,52%	99 713	5,16%	444 246	3,16%
NORWEGIAN AIR SHUTTLE	98 637	2,88%	53 339	2,07%	0	0,00%	258 034	1,84%
BRITISH AIRWAYS	61 358	1,79%	53 647	2,08%	55 574	2,87%	291 390	2,08%
AIR FRANCE	61 249	1,79%	45 375	1,76%	40 799	2,11%	262 819	1,87%
AER LINGUS	57 481	1,68%	40 526	1,57%	11 500	0,59%	232 307	1,65%
SCANDINAVIAN AIRLINES SYSTEM	51 603	1,50%	44 114	1,71%	49 504	2,56%	232 553	1,66%
ALITALIA	46 877	1,37%	41 055	1,59%	25 688	1,33%	235 316	1,68%
GERMANWINGS	46 371	1,35%	65 147	2,53%	38 704	2,00%	283 502	2,02%
ROYAL DUTCH AIRLINES	42 924	1,25%	35 794	1,39%	40 490	2,09%	209 595	1,49%
SWISS INTERNATIONAL AIR LINES	36 559	1,07%	23 256	0,90%	18 918	0,98%	127 080	0,91%
AUSTRIAN AIRLINES	26 882	0,78%	25 669	1,00%	22 346	1,16%	126 321	0,90%
CZECH AIRLINES	22 294	0,65%	19 424	0,75%	20 693	1,07%	99 850	0,71%
MALEV HUNGARIAN AIRLINES	15 222	0,44%	15 901	0,62%	10 140	0,52%	79 765	0,57%
AEROFLOT	15 218	0,44%	12 144	0,47%	12 217	0,63%	65 311	0,47%
FINNAIR	14 432	0,42%	7 782	0,30%	8 658	0,45%	73 921	0,53%
JET 2	12 170	0,35%	0	0,00%	0	0,00%	6 699	0,05%
TURKISH AIRLINES	11 411	0,33%	7 346	0,28%	6 791	0,35%	41 515	0,30%
BRUSSELS AIRLINES	10 223	0,30%	11 569	0,45%	8 067	0,42%	47 768	0,34%
AIR EUROPA	10 189	0,30%	12 991	0,50%	9 040	0,47%	45 591	0,32%
EL AL ISRAEL AIRLINES	5 930	0,17%	5 424	0,21%	4 412	0,23%	24 246	0,17%
STERLING	5 910	0,17%	0	0,00%	0	0,00%	8 643	0,06%
DIRECT FLY	5 402	0,16%	0	0,00%	0	0,00%	22 812	0,16%
AEROSWEET	4 937	0,14%	5 930	0,23%	7 041	0,36%	22 448	0,16%
CIMBER AIR	3 896	0,11%	875	0,03%	3 533	0,18%	15 848	0,11%
BLUE 1	3 804	0,11%	244	0,01%	0	0,00%	17 164	0,12%
SKYEXPRESS	3 096	0,09%	0	0,00%	0	0,00%	9 968	0,07%
BELAVIA	1 920	0,06%	1 892	0,07%	2 383	0,12%	7 380	0,05%
ADRIA AIRWAYS	1 121	0,03%	553	0,02%	0	0,00%	1 930	0,01%
AIR BERLIN GMBH	194	0,01%	0	0,00%	9 079	0,47%	0	0,00%
AIR BALTIC	0	0,00%	113	0,00%	0	0,00%	7 811	0,06%
ALPHAJET	0	0,00%	0	0,00%	0	0,00%	9 554	0,07%
AIRCRAFT MAINTENANCE COMPANY	0	0,00%	0	0,00%	9 926	0,51%	9 926	0,07%
AIR LITHUANIA	0	0,00%	0	0,00%	46	0,00%	95	0,00%
DAU	0	0,00%	1 758	0,07%	0	0,00%	2 102	0,01%
EAE	0	0,00%	95	0,00%	891	0,05%	10 792	0,08%
EUROCYPRIA AIRLINES LIMITED	0	0,00%	0	0,00%	67	0,00%	2 084	0,01%
HELIOS AIRWAYS	0	0,00%	4 824	0,19%	4 031	0,21%	0	0,00%
LTE INTERNATIONAL AIRWAYS	0	0,00%	1 404	0,05%	1 922	0,10%	0	0,00%
MAERSK AIR	0	0,00%	0	0,00%	4 458	0,23%	8 846	0,06%
NIKI	0	0,00%	0	0,00%	542	0,03%	19 186	0,14%
STYRIAN	0	0,00%	3 462	0,13%	0	0,00%	0	0,00%
TUNIS AIR	0	0,00%	5 250	0,20%	3 265	0,17%	0	0,00%
SUNEXPRESS	0	0,00%	0	0,00%	0	0,00%	4 396	0,03%
SKY AIRLINES	0	0,00%	0	0,00%	0	0,00%	2 604	0,02%
AIR MEMPHIS	0	0,00%	0	0,00%	0	0,00%	1 893	0,01%
CONSULTAS	0	0,00%	0	0,00%	0	0,00%	837	0,01%
CORSAIR	0	0,00%	0	0,00%	0	0,00%	275	0,00%
SLOVAKAIR	0	0,00%	0	0,00%	0	0,00%	373	0,00%
SUN D'OR INTERNATIONAL AIRLINE	0	0,00%	0	0,00%	0	0,00%	398	0,00%
SUMA	3 430 185	100,00%	2 578 346	100,00%	1 933 283	*100,00%*	14 040 816	100,00%
LCCs*	***1 675 215***	***48,48%***	***1 123 078***	***43,56%***	***497 155***	***25,72%***	***6 514 064***	***46,39%***
Przewoźnicy polscy**	***1 316 609***	***38,38%***	***1 088 674***	***42,22%***	***956 930***	***49,50%***	***5 803 450***	***41,33%***

*Przewoźnicy:AER LINGUS, AIR BERLIN GMBH, BLUE 1, CENTRALWINGS, EASYJET, GERMANWINGS, JET 2, NIKI, NORWEGIAN AIR SHUTTLE, RYANAIR, SKYEUROPE, WIZZAIR, STERLING

**Przewoźnicy: LOT POLISH AIRLINES, CENTRALWINGS, DIRECTFLY, SKYEXPRESS

Uwaga: Dane nie uwzględniają pasażerów w ruchu tranzytowym.

Źródło: Opracowanie ULC na podstawie informacji uzyskanych z portów lotniczych, Warszawa' 2007

Enclosure C. The Trade – the travel industry in Poland

www.tourismtrade.org.uk/Images/Poland_Trade_tcm12-34401.pdf

Overview of Trade Structure

The tourism market in Poland is currently in the process of very significant development and transformation from a market of marginal importance into one of the leading markets in Europe.

Currently, there are approximately 2,600 companies in the tourism sector, registered by the Ministry of Economy, Labour and Social Policy. The majority of Polish travel offices are rather small companies with up to nine employees. 74% of all employees in the tourism sector work in those small travel agencies or with tour operators.

Only seven Polish tour operators and travel agencies had revenues of approximately 25 million PLN (£4 million) and three had revenues in the range of 10-20 million PLN (£1.5-3 million). These ten Polish companies are able to compete with large Western European firms. However, none of them is expected to be able to compete in equal terms with large German and Scandinavian companies that serve larger numbers of clients than the total of outbound Polish tourism. The remainder of companies in the market are expected to become travel agents representing large tour operators. Small travel companies are also expected to concentrate on specialised trips such as sailing tours, language travel courses, horse riding trips and custom-made trips.

Polish Tour Operators

There are approximately 600 tour operators, both incoming and outgoing, in the Polish market and around 2,000 companies that are both tour operators and travel agencies. Tour operators and tour agents must be holders of special licences. Standard requirements for establishing and running a travel business are stipulated in the new bill on tourist services, valid from August 1997. The majority of tour operators are rather small companies (up to nine employees) and operate in the incoming sector. In fact only about 200 tour operators are able to prepare their own catalogues and Internet sites.

Poland's largest tour operator, PBP Orbis Travel, has maintained the leading position on the tour operators' market, mainly thanks to the fact that its domestic operations are increasingly significant.

The next largest are foreign wholesalers of tours: Scan Holiday, TUI Polska, Neckerman Polska, My Travel and Ecco Holiday. Some Polish operators, such as Triada, Itaka, Sindbad and Sigma Travel, have a secure position on the market, but they have had to significantly lower their margins.

Today approximately 30 Polish tour operators offer British products. The main ones are:

PBP ORBIS: offering groups and individuals, hotels, coaches, flight tickets, incentives, conferences and special interest programmes

TRIADA: offering groups and individuals, coaches and flight tickets and transport

ITAKA: tour operator and coach company, offering groups and individuals and providing a full service

ATAS: innovative tour operator for language holidays and language schools, language courses for youths and adults and accommodation in hotels, youth residences or with host families

STA Travel: travel offices offering flight and bus tickets and accommodation for groups and individuals (franchised to STA Travel Group)

Almatur: offering full service programmes for groups and individuals, hotels and transport

Polish Travel Agencies

There are over 2,000 agencies in Poland. The majority are either franchises of, or wholly owned by, the major chains (TUI Polska, Neckermann Polska, PBP ORBIS). The remainder are privately owned. The trend is for the smaller, privately owned agencies either to become franchises of the major chains, or to be bought by the chains as wholly owned agencies.

While the larger agencies are doing well, they recognise at the same time the need for massive investment in technology to remain in business.

The smaller companies are finding that margins are under pressure and that they can no longer run the operation as a family business.

Most agencies are computerised. Internet and booking system technologies are being actively used by most of them. Poles have a good technical education and are not afraid of new systems, but smaller agents often still work with faxes and paper.

Reaching the Trade

Trade Fairs

Tour Salon Travel Fair, Poznan is the largest trade show of its type organised in Poland, with over 20,000 visitors in 2006, including 7,000 trade visitors. The fair is held during the latter part of October in the city of Poznan in western Poland.

TT Warsaw is the largest holiday fair for trade and consumers in Poland. In 2006, 478 exhibitors and over 30,000 visitors attended the show. The show is held at the Palace of Culture and Science in Warsaw at the end of September.

Polish Agents' Sales Guide - VisitBritain produces an annual Agents' Sales Guide for the Polish market that is the definitive guide for agents that book travel to Britain. This has a circulation of 5,000 across the country. Have your product or service featured from just £200.

Enclosure D. Summary of meetings with Tour Operators and Travel Agencies in Warsaw, 19th – 21st of September at TT Warsaw Tour & Travel – by Jagna Noren

We (Carl Henrik Marcussen and Jagna Noren) spoke with:

ORBIS Travel, Anna Swidnicka, Director for the division of roundtrips, by flight as well

- aware of customers growing interest in Bornholm
- filled out questionnaire
- Informed that the division responsible for Scandinavia is in Olsztyn
- New products are created in August each year. Deadline for catalogue in October

TUI Polska, Andrzej Wasiluk, Product Manager, Self Drive Division

- Bornholm is requested by clients and becoming modern
- Bornholm needs to become visible in polish media.
- Will send a draft co-operation contract for info
- Don't believe in Bornholm as a flight destination as it is too expensive and the distance is too short.
- Flights can only be considered for targeted groups. Golf?

Neckermann Polska, Magda Plutecka Dydon, PR Manager (General Manager: Krzysztof Piatek)

- Bornholm is becoming trendy
- Deadline for catalogue 2008 is in November
- Send e-mail with questioner and information to
  Product Manager of Self Drive division, Mr Michal Olejnik Michal.olejnik@neckermann.pl
  and to Product Manager of Flight division, Mrs Aleksandra Kusto
  aleksandra.kusto@neckermann.pl with copy to m.plutecka-dydon@neckermann.pl

TRIADA, Jacek Socha, Product Director

- Haven't considered Bornholm as a new product
- Became motivated
- Wants to meet on fairs in Poznan with an representative from Bornholm

ITAKA

- Flight and bus to warm countries
- Bustrips to Scandinavia
- Send info about Bornholm to Dorota Wodecka, dorota.wodecka@itaka.pl

And many different travel agencies, which already have or consider having Scandinavia in their offer:

Biuro Turystyki Skandynawskiej – FREGATA, Ryszard Szczepanski, Manager

- Have sold Bornholm as both self drive and bus trips in cooperation with Scandlines, both form Sassnitz and Swinoujscie
- Bornholmstrafikken´s timetable is not good
- Accommodations expensive

Nordic Tours Norge AS, Rob Mulder, General Manager

- might be interested in Bornholm for conferences
- asks for information of Bornholm in English or Danish

ESSENZ UNLIMITED, Natalia Samarcande, Manager

Organizing eco-friendly tours all over the world, no knowledge of Bornholm, became motivated

Active Travel, Mateusz Kozbial, Sales Manager

Active trips, conferences, send materials

Opal Travel, Szymon Sado, Managing Director

Travel AND action, Katarzyna Bobinska

Bicycle vacations, golf

September 2007

Jagna Norén

Enclosure E. Results from the Airport Survey – Task Force Poland – by Anna Pallikaras

Introduction

A survey was conducted in connection with three airline flights from Oslo, Hamburg and Billund to Bornholm to learn more about the summer routes in general and specifically with a view to determine whether or not there is a basis for opening a flight to Poland. Bornholm receives 29.000 Polish tourists every year (58.000 passengers), and many businesses on Bornholm wish to attract even more. At present there is no flight between Poland and Bornholm, and it is therefore difficult to ask Polish flight passengers. The method has therefore been to conduct a survey based on two international flights and one domestic flight where parallels hopefully can be drawn to a potential flight to Poland. The following results are a summary of the available data:

The results

Based on a population of 243 (100%) 35% of the passengers were from the Oslo flights, 19% were from the Hamburg flights and 46% were from the Billund flights. The Billund flight was therefore the most popular, but this is no surprise as `the rest of Denmark´ is Bornholm´s largest market. Even though there appeared to be a difference in percentage between the number of passengers on the Oslo flights and Hamburg flights, there was in fact an equal amount of passengers on the Hamburg and Oslo flights.

Based on a population of 244 (100%) 89% of the passengers arrived by plane, 10% had used other means of transport, and 2% did not respond, but all departed by plane of course. It is possible that it is the passengers from the Billund flights who have arrived by ferry and have departed by plane. It is very likely that visitors use the same means of transport (plane) once a flight has been opened, and it is mainly Danes who combine means of transport (ferry & plane).

Based on a population of 244 (100%) 6% had stayed in their own home (meaning house, summerhouse or holiday home), 32% had stayed in a hotel, 16% had stayed in a holiday centre, 14% had stayed in a summerhouse, 5% had stayed in a camping site, 4% had stayed in a hostel, 21% had stayed with family and friends, 1% had indicated another form of accommodation such as bed & breakfast and `a room´, and 1% did not respond. Staying at a hotel was the most popular, but staying with family and friends, in a summerhouse or holiday centre was also very popular. It can therefore be said that there is a connection between purchase of an airline ticket and an expensive form of overnight accommodation. There were only 5% who stayed at a camping site and 4% which stayed at a hostel. In this connection it should be mentioned that staying at a camping site often requires a little more than the allowed weight and number of luggage units (20-22 kilos on a short flight), which is why an airline ticket determines the type of overnight facility chosen at the destination.

Based on a population of 244 (100%) 19% travelled alone, 29% travelled with a partner or spouse, 11% travelled as part of a family (small children), 10% travelled as part of a family (large children), 14% travelled as part of a family group, 12 % travelled with a friend or friends, 4% travelled with other travel companions and 1% didn´t respond. Travelling with your family in different types of constellations was the largest segment (35%), where travelling with your spouse was the second largest segment (29%). The 4% which travelled with other types of companions were in fact also `family groups´ in the sense that the companions were `bonus family´. With around 80% travelling with others, these results confirm Bornholms image as a family destination, but certainly also as a place you visit just with your partner.

Besides visitors from the rest of Denmark, Norwegians and Germans, people from Brazil, Canada, England and Austria also found their way to Bornholm by airplane. It is quite possible that they originally travelled to Billund from another destination and have taken a domestic flight to Bornholm.

Based on a population of 244 (100%) there was only 5% of the passengers who used a transfer bus to Rønne, and just 3% used a transfer bus to another destination on Bornholm. Taxi and rented car was very popular and they held a share of 31% and 11% respectively. Private cars had a share of 10%, which indicates that many of the passengers have friends or family on the island. It is also an indication of the fact that it is easier to get to the final destination by car than by bus, which is why cars in one way or another is the preferred means of transport. The same picture presents itself when the flight passengers were asked if they used the same means of transport from Bornholms airport to the overnight facility – 78% answered yes, 18% answered no and 3% didn´t respond.

Regarding the overall impression of Bornholm as a holiday destination, 59% of the respondents were so pleased that they ticked off `excellent´, and 34% had a `good´ impression of Bornholm. Only 5% felt that they had gotten an average impression of Bornholm, and 2% didn´t answer. This of course means that Bornholm is doing really well and has a lot to offer tourists, meaning that these same tourists are likely to visit again. This is confirmed by the next question where the results of this survey show that 35% are first-time visitors while 57% are repeat visitors. Only 8% chose not to answer this question.

Regarding booking of the actual flight/trip, 70% booked it over the internet. The next largest share comprising 10% was booking through a travel agent. Only 5% booked directly with the airline, and 8% had booked the trip in another manner (for example through the hotel). This confirms that the internet to a larger and larger degree is used to purchase products, and that it is here effort should be focused.

Regarding booking of overnight facility a different picture presents itself. 32% booked their stay over the internet, 12% booked through a travel agent, 1% booked through the airline but 40% had booked through family or friends or acquaintances. Direct booking through the hotel was also common.

The fact that there is difference between preferred ways of booking an airline ticket and booking a stay at a hotel can be a result of the fact that visitors in general have a better overview over airlines and airline offers than individual overnight facilities at the end destination, unless of course you are a repeat visitor. It can also mean that it isn´t possible to book stays over the internet everywhere on Bornholm. As will become apparent later on, it is also very common that information and booking is acquired through a network of family and friends.

When the respondents were asked if they had bought a package deal to Bornholm (flight and accommodation) only 11% answered yes and 80% answered no, and 9% didn´t respond (population 244). 15% of the respondents who had bought a package deal estimated the value of the package deal to be `very good´, while 33% estimated it to be good. Only 2%

didn't feel that it was good enough. Half of the respondents didn´t answer. Purchase of package deals has not been particularly popular, but the tourists who did buy felt that they received value for money. Two things can be concluded: package deals to Bornholm are of good quality and are at a reasonable price level, but package deals aren´t that popular. If there is a general interest in creating more package deals, then the packages shouldn´t be inflexible.[35]

The next question the respondents had to answer was where they had found information about Bornholm prior to their visit. Based on a population of 244(100%) 11 % had found information in a brochure or a catalogue, 6% had found information in an advertisement, 17% had used www.bornholm.info, 6% had found an internet advertisement, 15% had used a search engine on the internet, 1% had been inspired by a news flash on TV, 2% had found information in a weekly magazine or newspaper, 2% had asked a travel agent/package tour operator, but 36% had received information through other channels. It is quite evident that www.bornholm.info is effective and also evident that potential tourists `Google´ on the internet to find information. The web-based share is therefore at least 28% in total, and confirms that people in general use the internet to a very high degree – not just for information but also booking. The other media such as magazines and newspapers hold a small share, but it is quite interesting that 36% of the respondents have their information from other channels, which also include a lot of internet sources. When you look into the written answers, the respondents have often heard about Bornholm through family and friends. When one looks at the share `word of mouth´ has one can´t avoid the notion that people in general listen to advice and recommendations from friends and family. In this connection it should also be repeated that visitors in general have a very good impression of Bornholm, and pass on `the message´, which is one of the best and effective forms of exposure available (and quite free of charge).

It is also interesting to look at the spread in age groups. It is visitors between 25 and 59 years that collectively hold the largest share, although the age group 50 -59 had the largest single share. But the spread is quite even meaning that visitors in all age groups find Bornholm worth visiting. From this one can conclude that there are many offers (in different price ranges) to people in many different age groups.

[35] But tourism businesses on Bornholm and Destination Bornholm are already aware of this.

Which age group do you belong to?

Population	244 (100%)
16-24 years	14 (6%)
25-34 years	43 (18%)
35-49 years	51 (21%)
50-59 years	63 (26%)
60-69 years	38 (16%)
Over 69 years	17 (7%)
No answer	18 (7%)

There was a slightly more uneven spread in connection with level of education; 7 % had attended school for 9 years (basic schooling), 18% had between 9-12 years of education, 23% had 12 years of education plus non academic further education (vocational), and 39% had 12 years of schooling plus an academic education. 15% of the respondents didn´t answer. Visitors with further education held the largest share and a parallel can be drawn to annual household income (AHI). Out of the total population 7% had an AHI under 200.000 DKK, 21% had an AHI between 200.000 -400.00, 32% had an AHI between 400.00-700.000 (which was the largest single share). 19% had an AHI over 700.000 and 20% didn´t answer. It can be concluded that it is visitors with a good AHI who visit Bornholm which correlates with educational level.

Out of the total population 40% were men and 51% were women, and 9% didn´t answer, probably meaning that the questionnaire was filled in jointly. It is a fairly even spread meaning that Bornholm has offers which appeal to men and women.

The average length of stay for the total population was 7.5 bed nights. The average for the Oslo flight was 6.2, 8.7 for the Hamburg flight and 8 for the domestic Billund flight. They are quite similar to each other and it looks like the visitors tend stay for a week.

Cross references

		Did you buy a package deal to Bornholm (flight and accommodation at a single price?			
		Base	Yes	No	No answer
Where did you stay during your visit?	**Base**	**244** **100%**	**27** **100%**	**196** **100%**	**21** **100%**
	Own home (house, summer house, summerhouse, holiday home)	**15** **6%**	- -	13 7%	2 10%
	Hotel	**77** **32%**	21 78%	51 26%	5 24%
	Holiday centre	**39** **16%**	6 22%	30 15%	3 14%
	Summer house	**34** **14%**	- -	34 17%	- -
	Campingplads	**13** **5%**	- -	11 6%	2 10%
	Vandrerhjem	**9** **4%**	- -	7 4%	2 10%
	Hos familie og venner	**52** **21%**	- -	48 24%	4 19%
	Andet (skriv hvor)	**2** **1%**	- -	2 1%	- -
	Intet Svar	**3** **1%**	- -	- -	3 14%

In the above table it is possible to see where the visitors who have bought a package deal have stayed. They are mainly divided between stay at a hotel which comprises 78% of the total population and stay at a holiday centre which comprises 22 % of the total. There is a much more even spread between stay at an overnight facility for people who haven´t bought a package deal. The largest share is still stay at a hotel, but it is only 26% of the total. The next largest share was staying with friends and family which was 24% of the total. Next followed stay in a summerhouse (17%) and stay in a holiday centre (15%).

			Route		
		Base	Billund	Oslo	Hamborg
Where did you stay during your visit	**Base**	**243** **100%**	**111** **100%**	**85** **100%**	**47** **100%**
	Own home (house, summer house, holiday home)	**15** **6%**	9 8%	3 4%	3 6%
	Hotel	**77** **32%**	21 19%	38 45%	18 38%
	Holiday centre	**39** **16%**	21 19%	16 19%	2 4%
	Summer house	**33** **14%**	7 6%	6 7%	20 43%
	Campingsite	**13** **5%**	9 8%	2 2%	2 4%
	Youth hostel	**9** **4%**	5 5%	2 2%	2 4%
	With family and friends	**52** **21%**	36 32%	16 19%	- -
	Other (write where)	**2** **1%**	1 1%	1 1%	- -
	No answer	**3** **1%**	2 2%	1 1%	- -

The table above indicates flight and choice of accommodation. As is evident visitors from Oslo prefer to stay in a hotel, comprising 45% of the population (85). They also like to stay with friends and family and in holiday centres both holding a share of 19%. In connection with the Hamburg flight there was an even spread between stay at a hotel – 38% of the total – and stay in a summerhouse which was 43% of the total. The other types of accommodation were not so popular. In connection with the Billund flights it was most popular to stay with friends and family (a share of 32%). The second largest shares were stays in a holiday centre and at a hotel – each holding a share of 19%. It can therefore be concluded that visitors from Oslo preferred hotels, holiday centres and friends and family, visitors from the Hamburg flight preferred either hotel or summerhouse, while the Billund passengers preferred staying with friends and family.

			Country of origin				
		Base	Denmark:	Norway:	Germany:	Other	No answer
Where did you stay during your visit?	**Base**	**244** **100%**	**110** **100%**	**84** **100%**	**44** **100%**	**6** **100%**	**-** **-**
	Own home (house, summer house, holiday home)	**15** **6%**	9 8%	3 4%	3 7%	- -	- -
	Hotel	**77** **32%**	20 18%	38 45%	15 34%	4 67%	- -
	Holiday centre	**39** **16%**	21 19%	16 19%	2 5%	- -	- -
	Summer house	**34** **14%**	7 6%	7 8%	19 43%	1% 17%	- -
	Campingsite	**13** **5%**	8 7%	2 2%	3 7%	- -	- -
	Youth hostel	**9** **4%**	5 5%	2 2%	2 5%	- -	- -
	With family and friends	**52** **21%**	36 33%	15 18%	- -	1 17%	- -
	Other (indicate where)	**2** **1%**	1 1%	1 1%	- -	- -	- -
	No answer	**3** **1%**	3 3%	- -	- -	- -	-

When one compares the above table with the previous one a similar pattern presents itself. The visitors which have used the different flights live in either: Germany, Norway or Jutland, and the preferred type of accommodation divides itself up over the nationalities in the same way as the actual flights.

Parallels to a potential Polish flight

- If a flight between Poland and Bornholm is opened up it is likely that it will be used for a round trip and that a combination of plane and ferry will be avoided.
- An airline ticket structures or determines type of accommodation chosen, and it is usually of the more expensive kind. Polish tourists will most likely chose a hotel, a holiday centre or a summerhouse.
- As it is mainly couples and families who use the Oslo, Hamburg and Billund flights, it would be possible to market Bornholm to couples and families in Poland, and package deals for couples would be particularly suitable.
- As 93% of the respondents liked Bornholm very much, it is likely that Polish tourists would find Bornholm just as attractive and would visit the island again.
- The trips should be `bookable´ on the internet and preferably in Polish and package deals should include airline ticket and accommodation as there is a language barrier (both ways) which may hinder direct contact with the hotel.
- In general Bornholm should be exposed on the internet.
- It is likely that Polish visitors will be between the ages of 25 and 59, meaning the active part of the labour market which also has the means to travel.
- It is likely that the visitors will stay for a week.

Supplementary analysis of departing airline passengers to Hamburg, Oslo, and Billund

By Carl Henrik Marcussen

Table 30 Germany, Hamburg: Percent of population, percent of info. requests, percent of passengers

	State in Germany	Population	Percent of population	Percent of requests	Hamburg by air %	Capitol
1	Schleswig-Holstein	2.828.760	3%	9%	18%	Kiel
2	Hamburg	1.734.830	2%	7%	35%	Hamburg
3	Bremen	663.213	1%	2%	3%	Bremen
4	Mecklenburg-Vorpomme	1.719.653	2%	4%	3%	Schwerin
5	Berlin	3.387.828	4%	7%	10%	Berlin
6	Brandenburg	2.567.704	3%	3%	0%	Potsdam
7	Niedersachsen	8.000.909	10%	19%	5%	Hanover
8	Sachsen-Anhalt	2.494.437	3%	2%	0%	Magdeburg
9	Nordrhein-Westfalen	18.075.352	22%	22%	10%	Düsseldorf
10	Hessen	6.097.765	7%	6%	3%	Wiesbaden
11	Thüringen	2.355.280	3%	1%	0%	Erfurt
12	Sachsen	4.296.284	5%	5%	0%	Dresden
13	Rheinland-Pfalz	4.061.105	5%	2%	0%	Mainz
14	Saarland	1.056.417	1%	0%	0%	Saarbrücken
15	Bayern	12.443.893	15%	6%	8%	Munich
16	Baden-Württemberg	10.717.419	13%	6%	8%	Stuttgart
	Germany	82.500.849	100%	100%	100%	Berlin

1-8	North	23.397.334	28%	51%	73%
9-16	South	59.103.515	72%	49%	28%
	Germany	82.500.849	100%	100%	100%

28% of the population, 51% of the information requests and 73% of the travelers on the route Hamburg-Bornholm came from the eight northern bundesländer.

51% of the travelers came from Hamburg and Schleswig-Holstein which was initially defined as the catchment area for Hamburg Airport. On top of this comes 8% from Bremen and Niedersachsen. A bit surprising perhaps, as much as 10% come from Berlin.

Table 31 Norway, Oslo: Percent of population, percent of info. Requests, percent of passengers

7	County	Admin. centre	Population	Population %	Requests %	Air visits%
1	**03 Oslo**	Oslo	529.846	11,5%	13,6%	18,8%
1	**02 Akershus**	Oslo	494.218	10,7%	16,6%	30,6%
2	**04 Hedmark**	Hamar	188.376	4,1%	4,3%	4,7%
2	**05 Oppland**	Lillehammer	183.174	4,0%	3,1%	3,5%
3	01 Østfold	Sarpsborg	258.542	5,6%	8,0%	8,2%
3	**06 Buskerud**	Drammen	243.491	5,3%	7,4%	5,9%
3	07 Vestfold	Tønsberg	220.736	4,8%	4,1%	0,0%
3	08 Telemark	Skien	166.289	3,6%	3,1%	3,5%
4	09 Aust-Agder	Arendal	103.596	2,2%	2,8%	2,4%
4	10 Vest-Agder	Kristiansand	161.276	3,5%	3,0%	0,0%
4	11 Rogaland	Stavanger	393.104	8,5%	7,0%	8,2%
5	12 Hordaland	Bergen	448.343	9,7%	8,1%	2,4%
5	14 Sogn og Fjordane	Leikanger	107.032	2,3%	1,7%	2,4%
5	15 Møre og Romsdal	Molde	244.689	5,3%	3,6%	1,2%
6	16 Sør-Trøndelag	Trondheim	272.567	5,9%	5,7%	0,0%
6	17 Nord-Trøndelag	Steinkjer	128.444	2,8%	2,3%	0,0%
7	18 Nordland	Bodø	236.825	5,1%	3,1%	4,7%
7	19 Troms	Tromsø	152.741	3,3%	2,3%	1,2%
7	20 Finnmark	Vadsø	73.074	1,6%	0,2%	2,4%
	Total, Norway, 2005	Oslo	4.606.363	100,0%	100,0%	100,0%

02+03+04+05+06	Gardermoen	1.639.105	36%	45%	64%
01+07+08	Sandefjord Torp	645.567	14%	15%	12%
01+**06**+07+08	Torp w/**Buskerud**	889.058	19%	23%	18%

64% of the travellers on the route Oslo-Bornholm came from the five counties which were initially defined as the catchment area of Oslo Gardermoen Airport.

No.	The 7 parts of Norway	Main cities	Population	Population %	Requests %	Air visits%
1	Oslo og Akershus	**Oslo**	1.024.064	22,2%	30,2%	49,4%
2	Hedmark og Oppland	**Hamar**, Lillehammer	371.550	8,1%	7,4%	8,2%
3	Sør-Østlandet	Sarpsborg, **Drammen**, Tønsberg, Skien	889.058	19,3%	22,6%	17,6%
4	Agder og Rogaland	Arendal, Kristiansand, **Stavanger**	657.976	14,3%	12,8%	10,6%
5	Vestlandet	**Bergen**, Leikanger, Molde	800.064	17,4%	13,4%	5,9%
6	Trøndelag	**Trondheim**, Steinkjer	401.011	8,7%	8,0%	0,0%
7	Nord-Norge	**Bodø**, Tromsø, Vadsø	462.640	10,0%	5,6%	8,2%
	Total		4.606.363	100,0%	100,0%	100,0%
	1+2+3	Gardermoen	2.284.672	50%	60%	75%

50% of the population, 60% of information request and 75% of travellers on the route Oslo-Bornholm came from the Oslo/Akershus, Hedmark and Oppland, and Sør-Østlandet parts of Norway.

Table 32 Denmark, Billund: Percent of population, percent of info. requests, percent of passengers

County	Population	% of popula.	% requests	% requests	Air visits
Københavns Kommune	501.664		2005	2006	2007
Frederiksberg Kommune	91.721				
Københavns Amt	618.407				
Storkøbenhavn	1.211.792	22,5%	26,2%	25,1%	2%
Frederiksborg Amt	373.688	6,9%	7,2%	7,9%	1%
Roskilde Amt	237.089	4,4%	6,1%	5,1%	0%
Vestsjællands Amt	302.479	5,6%	7,2%	7,0%	0%
Storstrøms Amt	261.884	4,9%	3,9%	4,5%	0%
Bornholms Region	43.774	0,8%	0,3%	0,3%	5%
Fyns Amt	475.082	8,8%	10,1%	10,1%	4%
Sønderjyllands Amt	252.936	4,7%	4,5%	4,6%	10%
Ribe Amt	224.595	4,2%	2,9%	2,8%	8%
Vejle Amt	355.691	6,6%	7,2%	7,4%	27%
Ringkøbing Amt	274.830	5,1%	3,6%	3,7%	15%
Århus Amt	653.472	12,1%	10,6%	11,3%	15%
Viborg Amt	234.659	4,3%	3,2%	2,9%	6%
Nordjyllands Amt	495.669	9,2%	7,1%	7,3%	8%
I alt	5.397.640	100%	100,0%	100,0%	100%
Billund	1.743.247	32%	27%	28%	70%

70% of the travellers on the Billund-Bornholm route came from what was originally defined as the catchment area. On top of that comes 5% from Bornholm, i.e. 75% in total. Another 10% of the travellers on the route came from what was previously called Southern Jutland County, Sønderjyllands Amt.

Enclosure F. Overview of existing reports and information about Poland as a market for Bornholm – by Lene Feldthus Andersen, April 2007

<table>
<tr><td colspan="2">Det polske marked for færgetransport til Bornholm
http://www.crt.dk/media/Polske_marked_færgetransport_Bornholm_Carl_Henrik_Marcussen_WP29_CRT.pdf

Af Carl Henrik Marcussen og Birgit Nahrstedt

Udgivet af Center for Regional og Turismeforskning, oktober 2006.

116 sider</td></tr>
<tr><td>Formål</td><td>Hovedkonklusioner/resultater</td></tr>
<tr><td>Formålet med undersøgelsen er at afdække behovet for færgetransport mellem Polen og Bornholm med særligt henblik på ruten mellem Kolobrzeg og Nexø.

Denne afdækning er foretaget ved at besvare følgende spørgsmål:

1. Historikken:

Hvordan er historikken i hyppigheder, passagerer og tonnage på ruterne mellem Polen og Bornholm, hvordan er historikken i polske overnatninger på Bornholm, hvordan har billedet været på ruterne mellem Polen og København, og hvor stor en del af de polske overnatninger i Danmark tegner Bornholm sig for?

2. Karakteristika ved polske turister på Bornholm:

Hvilke typer af turister kan det polske marked opdeles i? Hvor store er de enkelte grupper af turister? Hvordan er sammensætningen af de turister, der i dag besøger Bornholm? Er der forskel på de polske turister, der kommer via Rønne, og dem, der kommer via Nexø? (Antal, opholdslængde, transportformer: med/uden bil, med/uden cykler). Hvad foretager de polske turister sig, når de er på</td><td>Der har været sejlet fra Polen til Bornholm siden starten af 1990'erne. Der har fra 2005 til 2006 været en stigning på over 30% i antallet af passagerer, hvilket skyldes, at skibet Jantar næsten har fordoblet sit passagertal, både i kraft af flere rundture og bedre belægning.

Polakkerne overnatter på Bornholm primært i to overnatningstyper: Camping og feriecentre. For det tredje overnattes i feriehuse. Da polakker har en lav gennemsnitsindkomst, hører de primitive lejrpladser også med i billedet af polakkernes overnatninger.Ca. en fjerdedel af polakkernes overnatninger på Bornholm ligger udenfor de almindelige registrerede overnatningstyper.

På ruterne fra Polen til Nexø såvel som Rønne er der ca. 90% polakker og 10% tyskere. Polakkerne, som kommer til Bornholm via Nexø, har en gennemsnitsalder på 36 år, mens tyskerne er betydeligt ældre, nemlig 64 i gennemsnit. Tyskerne, som kommer til Bornholm via Nexø er alle endagsturister. De cykler heller ikke. og de har overhovedet ikke anvendt Internet som informationskilde forud for deres besøg på Bornholm. I modsætning hertil står polakkerne, for hvem Internet er den vigtigste informationskanal. De</td></tr>
</table>

Bornholm? Hvor tilfredse er de med opholdet og hvorfor? Hvor i Polen kommer de fra?

3. Efterspørgslen og tonnagen:

Hvor stort er behovet (markedet) for transport af personer, biler og lastbiler (gods) mellem Polen og Bornholm? I hvilken udstrækning bor kunderne i Polen eller på Bornholm? Hvordan er mulighederne for at få flere polske lejrskoler til Bornholm? Er der basis for indsætning af tonnage til transport af personbiler på ruten mellem Kolobrzeg og Nexø, når der er mulighed for transport af biler på ruten mellem Swinoujscie og Rønne? Er det relevant med mulighed for transport af gods (lastbiler) på ruten mellem Kolobrzeg og Nexø?

Indholdsfortegnelse:

holder meget af at cykle på Bornholm. Blandt polakker, som kommer til Bornholm via Nexø, er de 72% endagsbesøgende, mens 28% af overnattende gæster, som gennemsnitlig opholder sig 3,84 nætter på Bornholm. De polakker der kommer til Bornholm via Rønne har en næsten dobbelt så lang opholdstid.

82% af tyskerne og 71% af polakkerne tager på udflugt fra Nexø, deraf hver femte med afsluttende besøg på NaturBornholm, der arbejder meget aktivt med det polske marked. Sommerfugleparken i Nexø, Middelaldercentret, Joboland, museumsbesøg, Balka Dyrepark hører også med til aktiviteterne.

Der er dog også en ganske betydelig andel af endagsbesøgende polakker via Rønne, nemlig hele 38%. De resterende polakker, som kommer via Rønne til Bornholm, består af 7% cyklister og 55% bilister. Mens polakker via Rønne havde flere overnatninger på Bornholm i 2005, så overhalede Nexø i 2006 Rønne på det punkt. Totalt set anvendes der ca. 15 mio. kr. af polakker via Nexø, deraf godt 6 mio. til transporten for at komme til/fra øen og ca. 9 mio. kr. på øen, mens de polakker, der kommer til Bornholm via Rønne bruger ca. 7 mio. kr. deraf godt 2 mio. kr. til færgebilletterne og knap 5 mio. kr. på øen.

Ruterne til Nexø har en relativ stærk position i 6 af 16 amter med følgende hovedbyer: Szczecin, Poznan, Lodz, Katowice, Krakow og Gorzow Wlkp. Disse amter tegner sig for i alt 61% af polakker via Nexø. Herudover er der 5 yderligere amter, hvor der er et stort potentiale og gode vækstmuligheder for passagerer til Nexø: Amter med disse hovedbyerne Warszawa, Gdansk, Wroclaw, Bydgoszcz.

Fragtbehovet mellem Polen og Bornholm ligger på ca. 400 trailere med konsumfisk p.a., hvortil evt. kan komme transport af industrifisk. Der forgår desuden suppleringsleverancer af briketter og brændselspiller samt import af møbler og glasprodukter, men fisk og fiskehalvfabrikata tegner sig for langt hovedparten af det samlede fragtbehov mellem Polen og Bornholm.

3.1 Survey blandt afrejsende på Nexø Havn, 2006		
3.2 Observationsundersøgelse på Rønne Havn, 2006		
3.3 Sammenligning af turister via Nexø vs. Rønne		
4 Vurdering af det polske marked for færgetransport til/fra Bornholm 4.1 Fire vækststrategier ud fra et havneperspektiv		
4.2 Vurdering og prioritering af de polske amter		
4.3 Om tyskere, som besøger Bornholm via Polen: Det tyske marked		
4.4 Overnattende gæster i havnebyerne langs den polske kyst		
4.5 Persontransport		
4.6 Om at rejse med tog til færgen – i Polen		
4.7 Om flyrejser – og måske aften/natsejladser - fra/til Gdansk		
4.8 Sæsonudsving		
5 Sammenfatning		

Feasibility of establishing seasonal flights to Bornholm http://www.crt.dk/media/WP%2028%20Feasibility%20flights.pdf Af Carl Henrik Marcussen Center for Regional og Turismeforskning, 2006. 121 sider.	
Formål	**Hovedkonklusioner/resultater**
Formålet med undersøgelsen er at afdække potentialet for etablering af yderligere sæsonflyruter. Dette blev gjort ved at vurdere udvalgte udenlandske lufthavne og deres opland (100 km radius) ud fra følgende tre kriterier: 1. Der har i 2005 været mindst 500 efterspørgsler efter information om Bornholm fra området. 2. Der er mindst 1 million indbyggere i oplandet. 3. Afstanden fra oplandet til en færgehavn er mindst 500 km. Samt ved at screene de forskellige potentielle markeder for sæsonflyruter: Tyskland, Sverige, Norge, Polen, Holland, Schweiz, Storbritannien, Østrig, Finland, Italien, øvrige internationale markeder og det hjemlige marked.	Oslo og Stockholm opfylder alle tre kriterier. Hamborg, Berlin, Düsseldorf og Hannover er de mest lovende lufthavne i Tyskland for afgange til Bornholm. Køln-Bonn ligger i Düsseldorfs opland. Zürich og Basel har også potentiale. Warszawa og Krakow var med i undersøgelsen som polske lufthavne med opland. Disse to lufthavne lander som henholdsvis nr. 18 og 20 på listen med 28 mulige lufthavne i undersøgelsen. Vedr. sceeningen af det polske marked konkluderer undersøgelsen, at der er en relativ høj interesse for Bornholm i det nordvestlige Polen omkring Stetting og Gdansk og blandt de bedrestillede i Warszawa. Den nordøstlige del af Polen har ringe potentiale, både fordi det regional BNP er relativt lavt og fordi der er ringe interesse for Bornholm fra denne del af Polen.

Indholdsfortegnelse:

Rapport om de bornholmske virksomheders muligheder i de nye EU-lande i Østersøregionen

http://www.crt.dk/media/WP%2028%20Feasibility%20flights.pdf

Af Mikkel Toudal og Lars Espersen

Bornholms Erhvervscenter, juni 2005.

39 sider.

Formål

Formålet med rapporten er at beskrive mulighederne for det bornholmske erhvervsliv i de fire nye EU-lande ved Østersøen: Polen, Litauen, Letland og Estland.

Udover rapporten er der udarbejdet en *Guide til bornholmske virksomheders muligheder i nye EU-lande*

Der er indledningsvis en sammenfatning og konklusion i rapporten. Her står der blandt andet:

Hovedkonklusioner:

Mange af de bornholmske virksomheder er interesserede i de fire lande, men usikre på markedernes potentiale. Det gør dem tilbageholdende med at satse ressourcer på opdyrkning af markederne.

At virksomhederne, der ser et potentiale i markederne, bør indlede forretningskontakter, også selvom det i første omgang er små initiativer.

At import og ikke kun eksport skal betragtes som en fordel for udviklingen af det bornholmske erhvervsliv.

Et vigtigt budskab til rådgivningssystemet er, at rådgivning i forhold til international handel og særligt i forhold til Polen, Litauen, Letland og Estland skal integreres i den almindelige rådgivning.

Politikere og de offentlige institutioner kan i mange tilfælde hjælpe de bornholmske virksomheder i de fire lande i kraft af et udbygget kontaktnet og et grundigt kendskab til landene. Anbefalingen til det offentlige, at der formuleres en fælles Østersøpolitik med følgende vigtige elementer:

- Udvælgelse af en række samarbejdsområder, der kan hjælpe til koordinering af de ressourcer, bornholmske institutioner bruger i landene.

- Synliggørelse af den viden samt de kompetencer og kontakter, der eksisterer hos de bornholmske rådgivere, embedsmænd og politikere.

- Den internationale dimension i erhvervsrådgivning styrkes, så det bliver et naturligt element i forhold til alle brancher.

- Fokus på at øge virksomhedernes og medarbejdernes kompetencer i forhold til internationale forretninger.

- Der arbejdes for bedre transportforbindelser.

Som udgangspunkt for en diskussion anbefales følgende områder som strategiske samarbejdsområder:

- Det nordlige Polen

- Klaipeda i Litauen

- Riga i Letland

- Hiiumaa og Saaremaa i Estland.

Det polske feriemarked for Norden

TemaNord 2005:515

78 sider

Formål
Baggrunden for at iværksætte analysen er EU's udvidelse og forventningen om, dels at de nye EU-lande vil opleve en generel stigning i leve-standarden. Dels at Tyskland, som i dag er nordisk turismes vigtigste nærmarked, fremtidigt kan suppleres af Polen som nyt turismemæssigt nærmarked for Norden.

Formålet med en fællesnordisk indsats på dette område er at øge forståelsen for rejsemønstre og efterspørgslen efter turismetilbud i Polen, der som nyt - og geografisk nært placeret - EU-land vurderes at have et særligt potentiale for det nordiske turismeerhverv. Målet er at tilvejebringe grundlaget for at styrke den indgående turisme til Norden.

Formålet med indeværende analyse er således at få ny viden om omfanget og karakteren af det potentiale, som findes i Polen for ferieturisme til Norden på kort sigt (2005) og på lang sigt (2010).

Hovedkonklusioner/resultater

Det polske marked for ferieturisme er i væsentlig udvikling. I dag er det under halvdelen af den polske befolkning, der foretager ferierejser. 57 pct. af de undersøgte polske befolkningsgrupper har ikke foretaget en ferierejse i ind- eller udland inden for det seneste år. På trods af, at Polen med sine 38,5 mio. indbyggere er et stort og potentielt marked for de nordiske destinationer, estimerer undersøgelsen, at det reelle markedsgrundlag udgør ca. 5,7 mio. personer, der kendetegnes som "rejseaktive". Det er de personer, der i dag foretager ferierejser til udlandet og/eller i Polen.

Undersøgelsen afdækker polakkernes egne forventninger til ferierejser på kort og længere sigt, og tendensen er, at antallet af ferierejser vil stige jævnt, dog langt fra eksplosivt. Antallet af udlandsrejsende vil inden for de næste par år stige fra ca. 3,1 mio. til godt 6 mio. personer.

Polakkerne er nysgerrige, viser undersøgelsen. Interesserede i at se nye og ukendte steder, og det er den primære drivkraft bag udlandsrejser i dag, sammen med et stærkt ønske om at nyde solen, stranden og slappe af. Mulighed for at opleve nye attraktioner, naturen og at have en aktiv ferie spiller endvidere en vigtig, om end sekundær rolle. Som følge af begrænsede feriebudgetter er ønsket om at få en billig ferie, såvel i hjemlandet som i udlandet, også fremherskende.

De nordiske lande og selvstyreområder har i dag en samlet markeds-andel på 7 pct. (7 pct. af de i dag rejseaktive polakker har holdt ferie i Norden inden for de seneste tre år). Det svarer til ca. 215.000 personer. Konkurrencen er imidlertid skarp fra lande som eksempelvis Italien, Frankrig og Kroatien på den ene side og nabolande som Tyskland og Tjekkiet på en anden.

Med hensyn til muligheden for at tiltrække flere turister fra Polen til Norden de kommende år, identificerer undersøgelsen både muligheder og barrierer. Mulighederne er:

- En stigende interesse blandt den polske befolkning for de nordiske destinationer.
- Der er positive associationer til Norden (blandt dem, som kender lidt til Norden) som et sted med storslået natur og gode muligheder for afslapning, aktiv ferie og nye oplevelser. Især Norge og til dels Sverige og Finland har unikke positioner som attraktive destinationer for natur- og aktiv ferie.
- At Norden er en nær destination for polakker, som kan nås med bil/færge og ved busrejser, hvilket i dag er de mest udbredte transport-former i forbindelse med ferierejser.

Barriererne er:

- Lavt kendskab i den polske befolkning til Norden og hvert af de nordiske lande og selvstyreområder. Nordens image er ensidigt, og opfattelsen af Norden som et koldt ferieland vejer tungt.
- Konkurrencen fra især Sydeuropa er skarp, og polakkernes interesse for sol, varme og badeferier er høj, især blandt de formentlig trendsættende højindkomstgrupper. Derudover er der skarp konkurrence fra hjemlandet Polen, som fortsat forventes at være et populært rejsemål, og som tilbyder natur, afslapning og aktiv ferie i direkte konkurrence med de nordiske lande.
- Polakkernes mulighed for at foretage ferierejser de kommende år vil fortsat være hæmmet af begrænset økonomisk råderum.

Indholdsfortegnelse