

TRENDS IN TOURISTS' TRAVEL PATTERNS IN THE BALTIC SEA REGION

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AT PROJECT MEETING, RØNNE HAVN A/S, RØNNE 23RD OCT. 2018

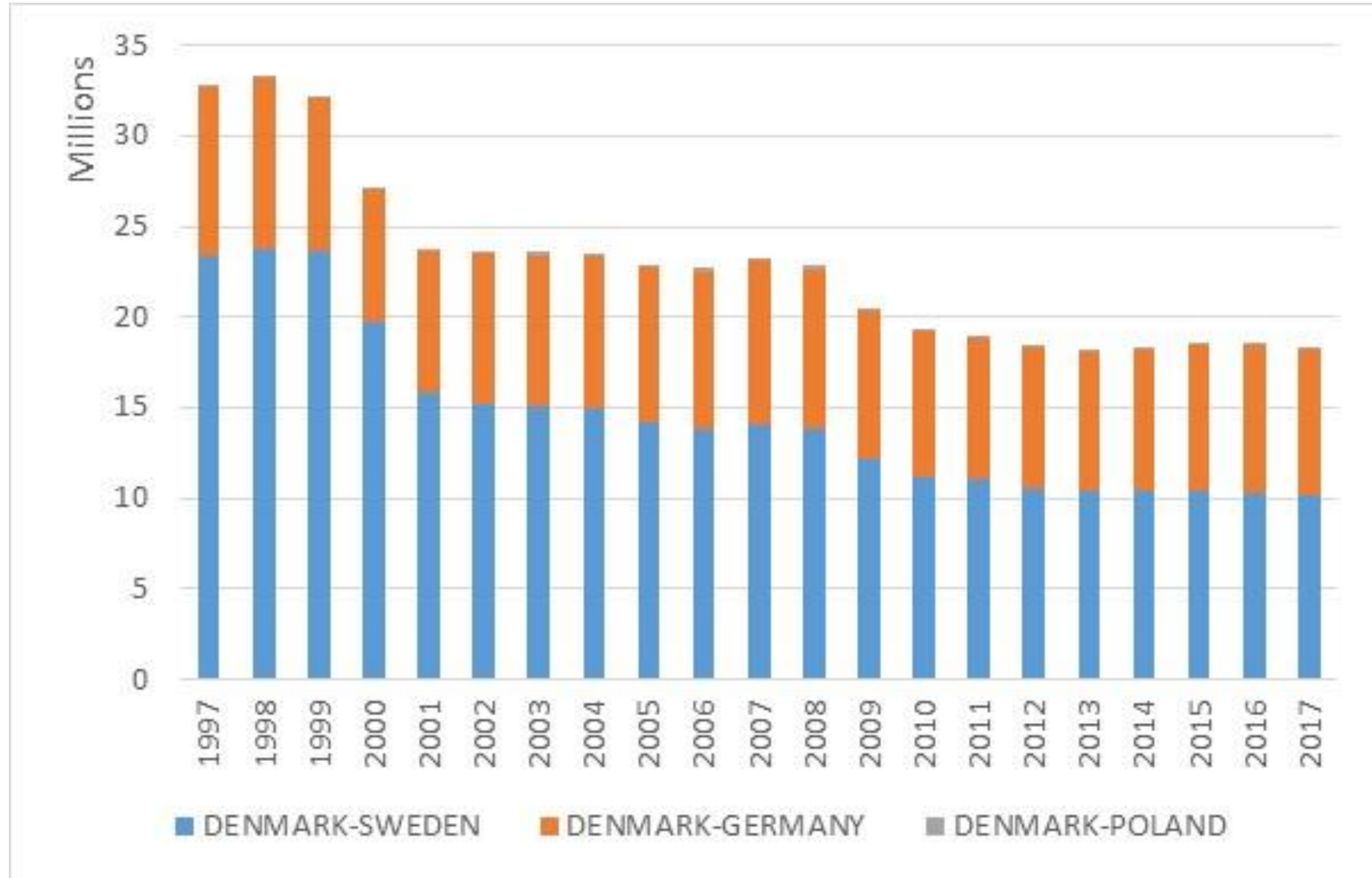
IN THE DANISH TRANSPORT INNOVATIONS NETWORK (TINV). THEME.

“TRENDS IN THE BALTIC SEA – FREIGHT & LOGISTICS AND TOURISM”

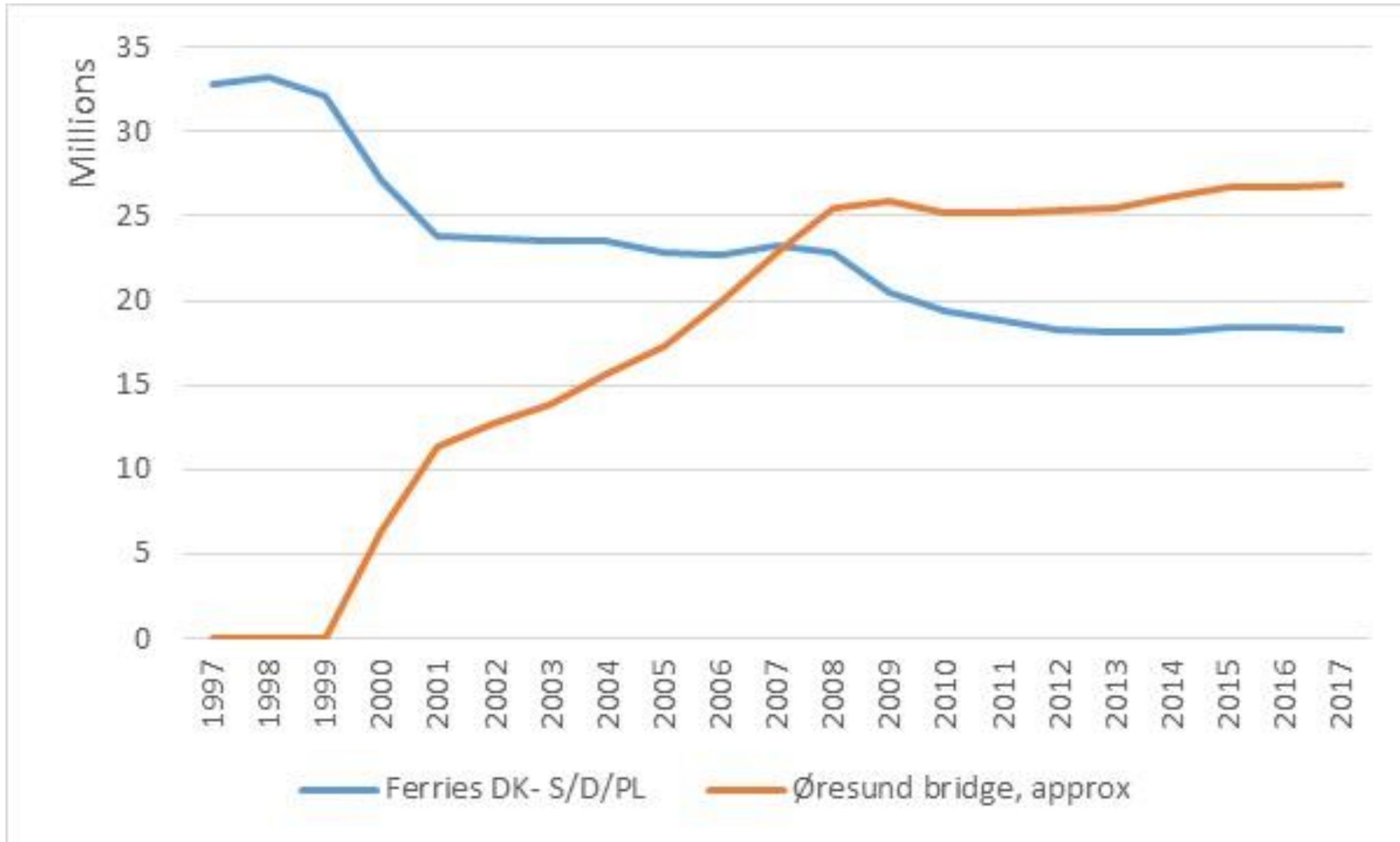
OVERVIEW

- Ferry passenger numbers and trends (DK, D, S, ..)
- Cruise tourism trends (CPH, ..)
- Air transport trends
- Trends in tourist nights
- Other related trends

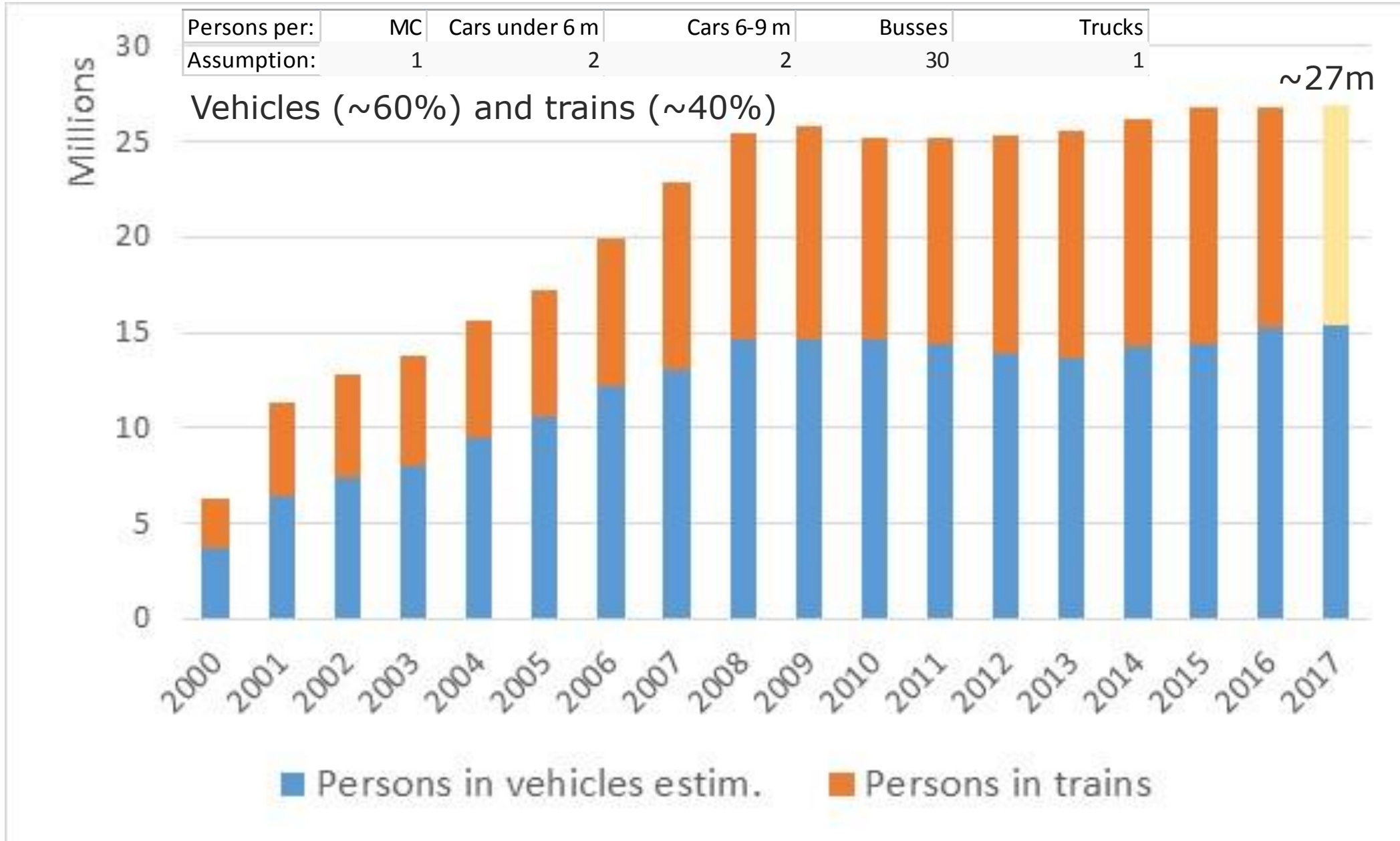
NO. OF FERRY PASSENGERS, DK-SWEDEN, DK-GERMANY, ..



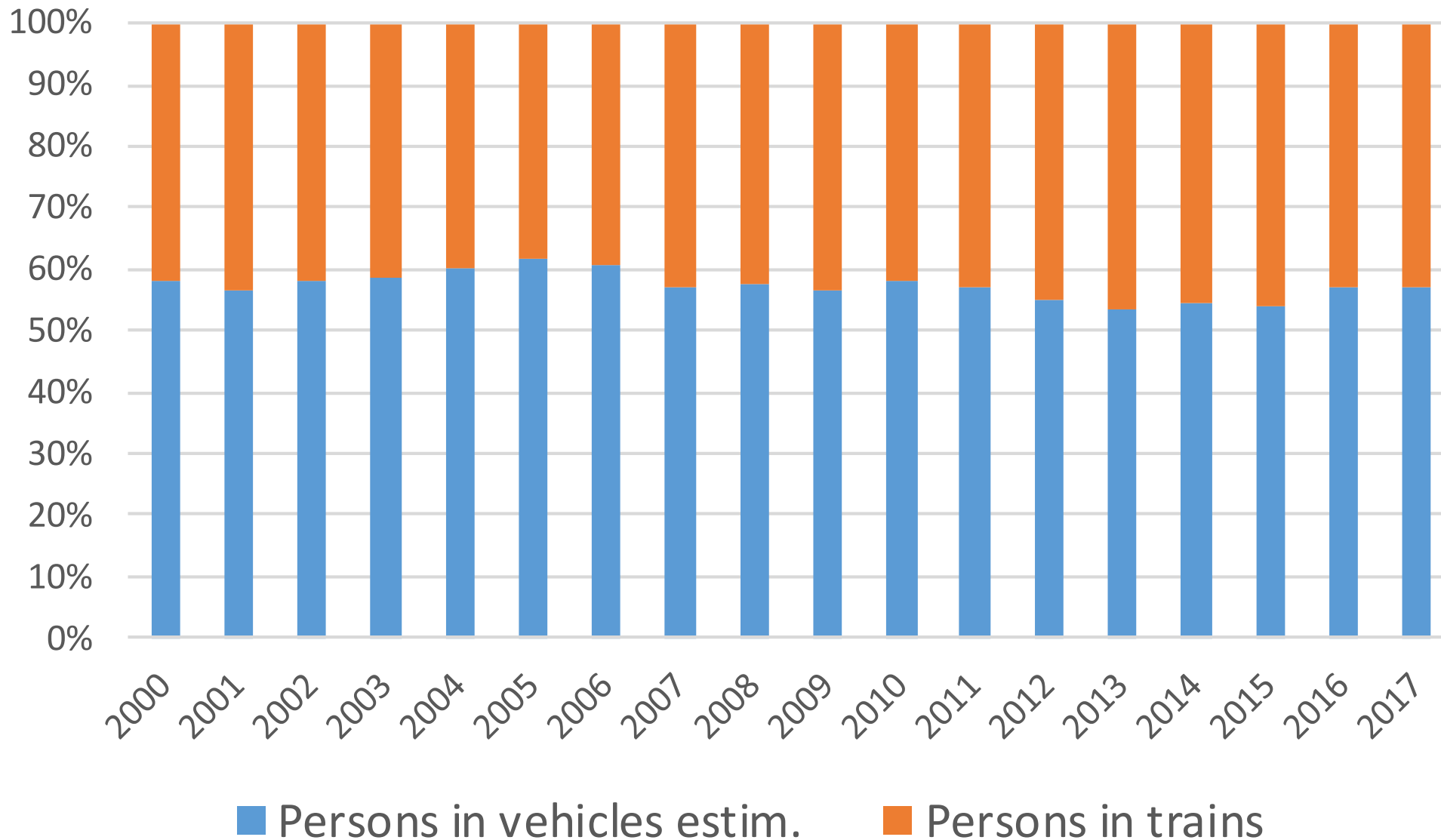
NO. OF FERRY PASSENGERS DK-S + DK-D , AND PERSONS CROSSING THE ØRESUND BRIDGE



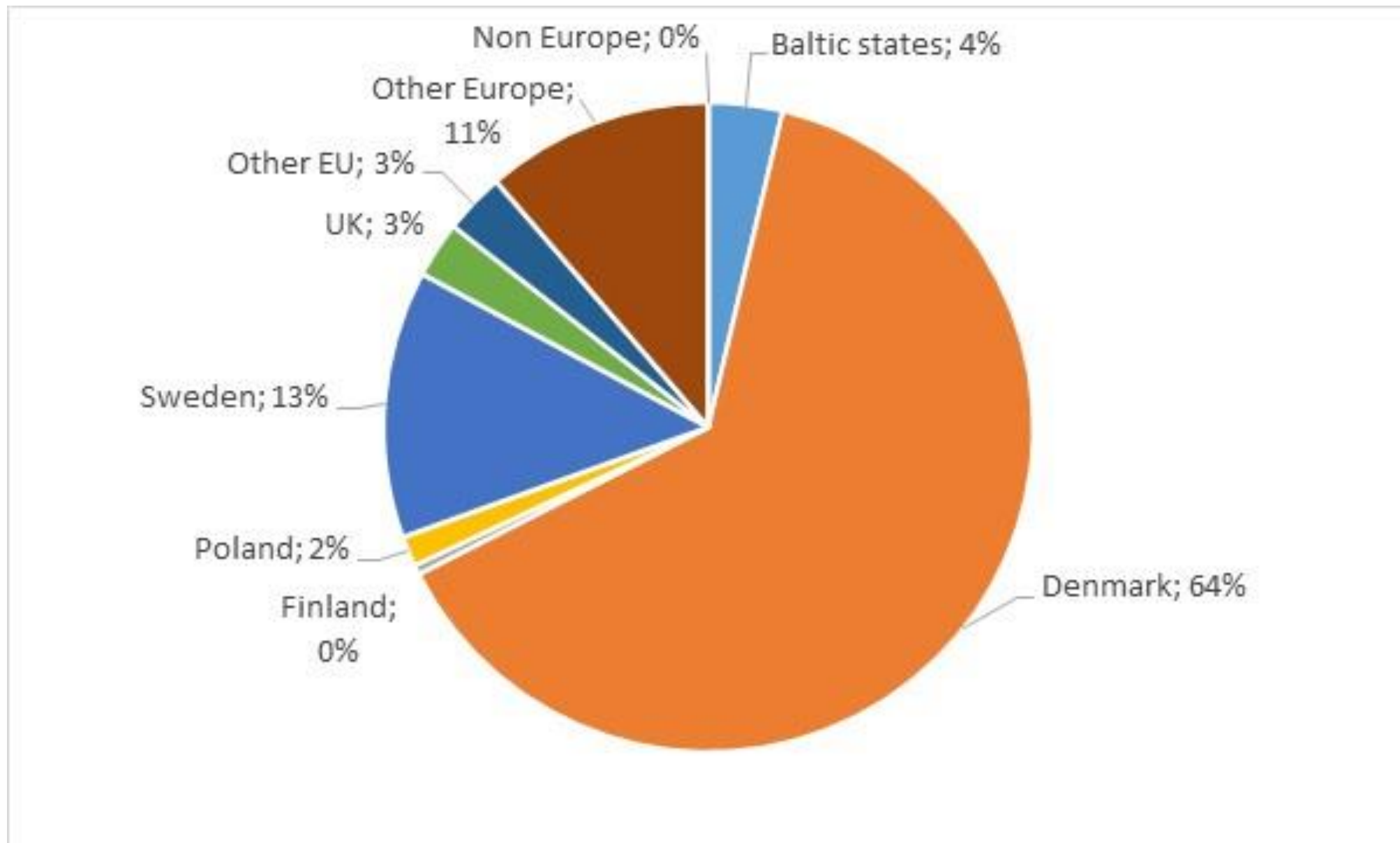
PERSONS CROSSING THE ØRESUND BRIDGE – BY VEHICLES AND TRAINS (~27 MILLIONS)



PERSONS CROSSING THE ØRESUND BRIDGE – BY VEHICLES (~60%) AND TRAINS (~40%)



FERRY PASSENGERS TO/FROM GERMANY (2017: 13,35 M)



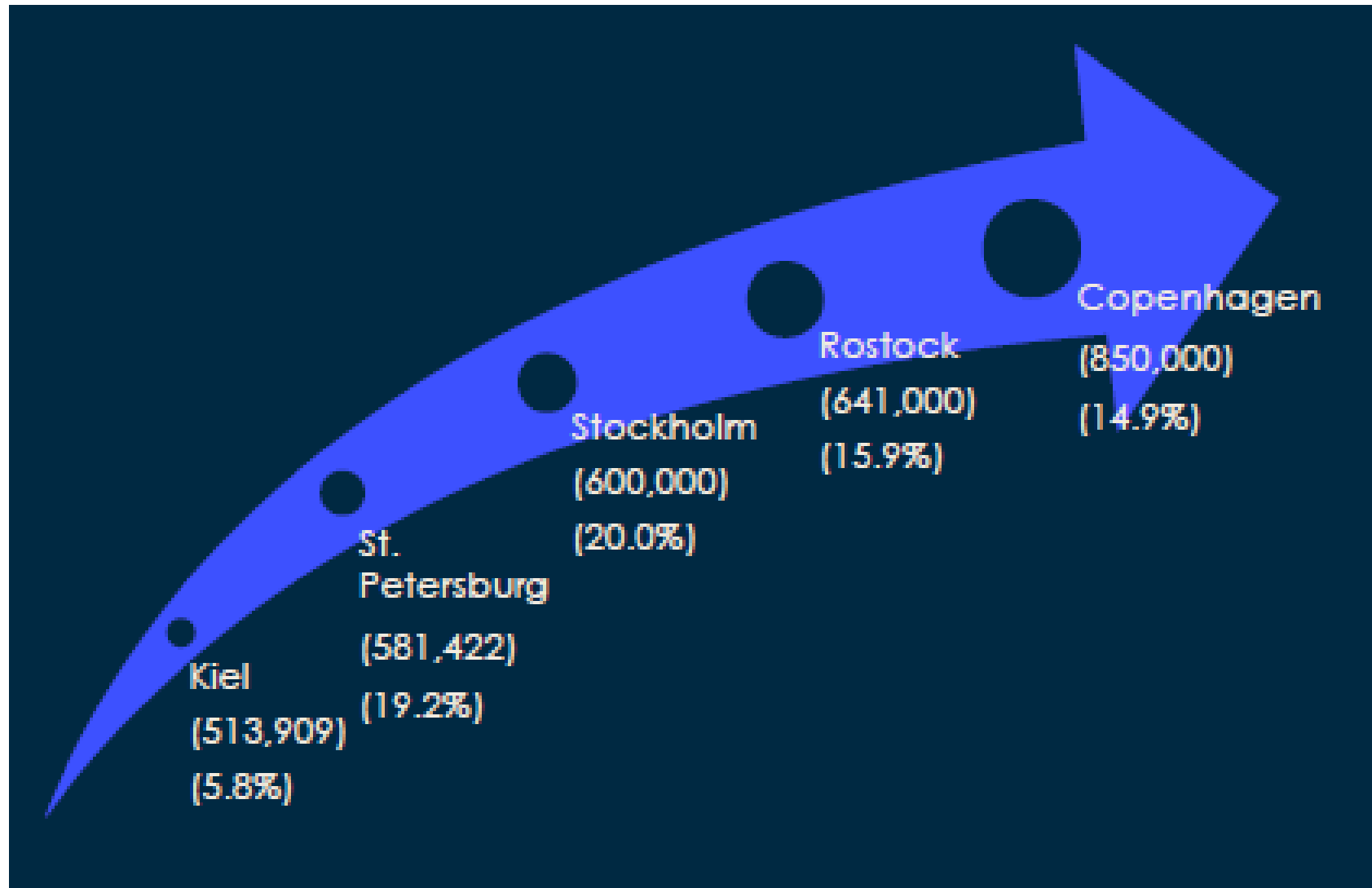
PASSENGERS TO/FROM BORNHOLM, SEA+AIR

	2008	2010	2012	2014	2016	2017	2016-17%
Ystad	1.310	1.190	1.310	1.313	1.375	1.450	5,4%
Simrishamn	25	24	26	-	-	-	
Sealand	99	82	59	59	67	70	4,7%
Germany	103	93	98	97	109	107	-1,5%
Poland	60	45	26	30	32	31	-3,1%
Airplane	194	249	180	240	276	263	-4,8%
Total (*1000)	1.791	1.683	1.699	1.739	1.859	1.921	3,3%

Source: CRT, based on data from Statistics Denmark (Danmarks Statistik, DST).

Note: Two ferrylines Poland-Rønne sailing on Saturdays in season are not included.

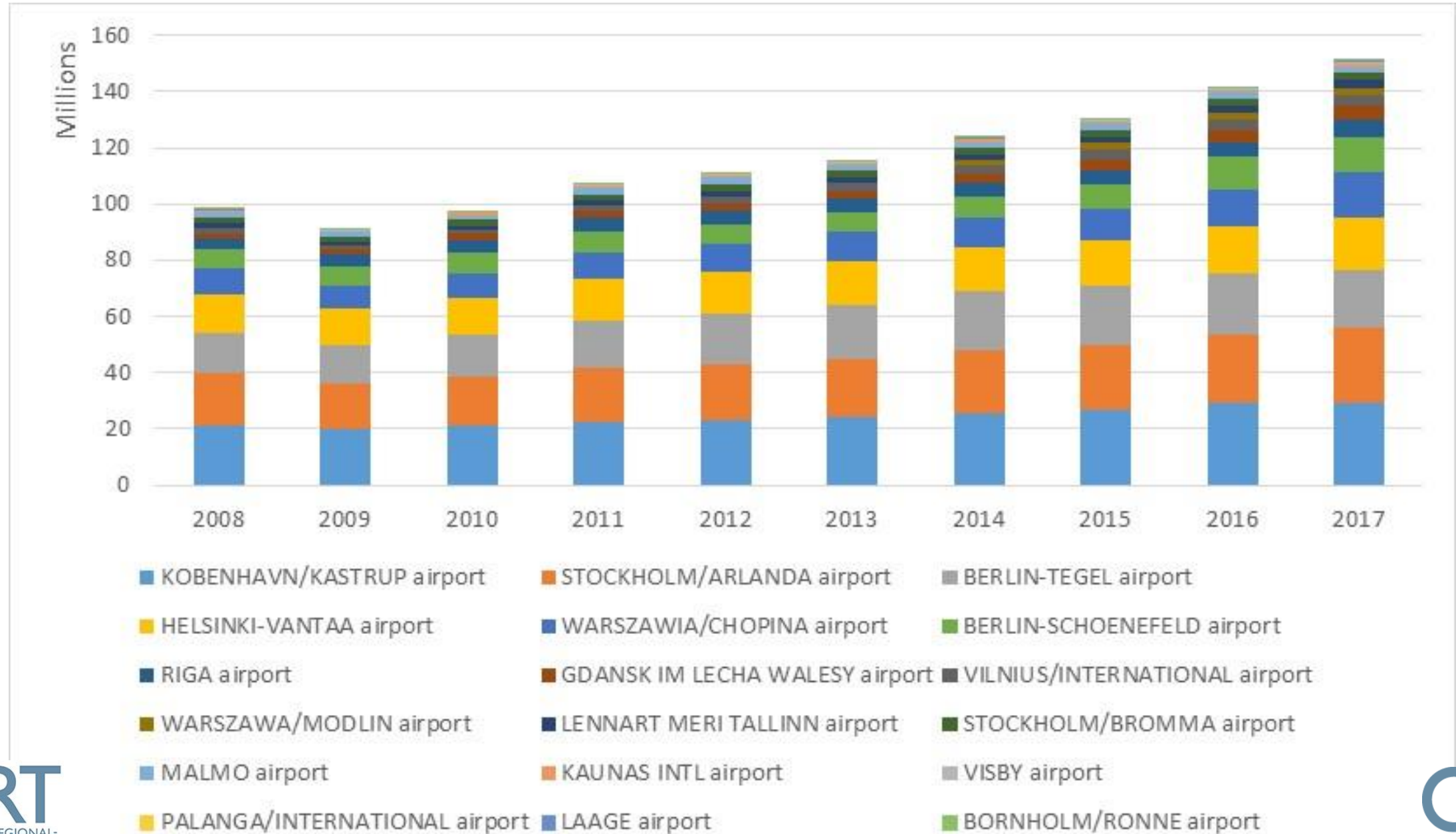
CRUISE STATISTICS: CRUISE BALTIC



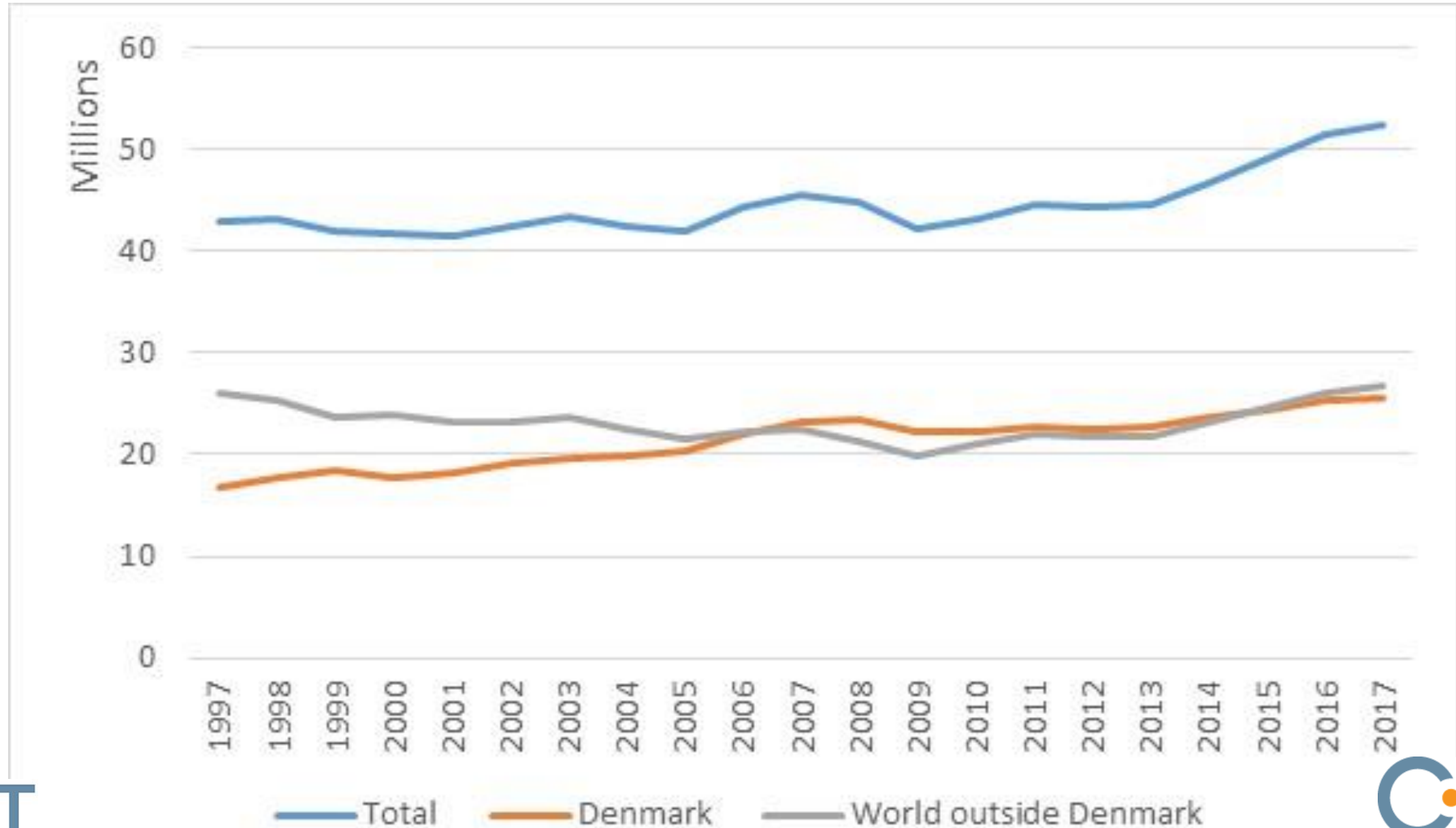
CRUISE STATISTICS: CRUISE BALTIC

Small (0-24 calls)	Mariehamn (19), Lübeck-Travemünde (14), Fredericia (8), Turku (7), Kalundborg (6), Elsinore (6), Karlskrona (6), Arendal (5), Helsingborg (5), Saaremaa (5), Kotka (4), Kalmar (1) Kemi (0), Malmö (0)
Medium (25-49 calls)	Gothenburg (41), Aarhus (36), Aalborg (35), Skagen (31), Rønne (26)
Large (50-199 calls)	Rostock (190), Kiel (143), Oslo (101), Riga (85), Kristiansand (52), Gdansk (64), Klaipeda (63), Visby (59)
X-Large (200+ calls)	Copenhagen (325), St. Petersburg (319), Tallinn (311), Helsinki (266), Stockholm (264)

NO. OF PASSENGERS, SELECTED AIRPORTS IN THE BALTIC SEA AREA



NO. OF REGISTERED TOURIST OVERNIGHTS IN DK, 1997-2007



NO. OF REGISTERED TOURIST OVERNIGHTS IN COUNTRIES AROUND THE BALTIC SEA

	2008	2012	2016	2017	2017 index
EU28+EFTA4	2.435.849.136	2.686.368.960	3.164.765.945	3.281.782.360	135
Denmark (DST)	44.716.826	44.428.455	51.453.932	52.313.730	117
Germany	323.876.009	350.349.425	388.851.871	388.851.871	120
Estonia	4.602.212	5.544.537	6.228.128	6.509.299	141
Latvia	3.501.063	3.546.736	4.416.597	4.950.929	141
Lithuania	3.249.339	5.741.252	6.992.674	7.364.924	227
Poland	56.645.518	62.014.890	79.393.860	83.880.915	148
Finland	19.465.620	20.317.582	20.343.433	21.914.154	113
Sweden	46.540.868	48.585.972	57.234.148	57.234.148	123
Baltic Sea area	502.597.455	540.528.849	614.914.643	623.019.970	124

Source: Eurostat + Statistics Denmark (DST)

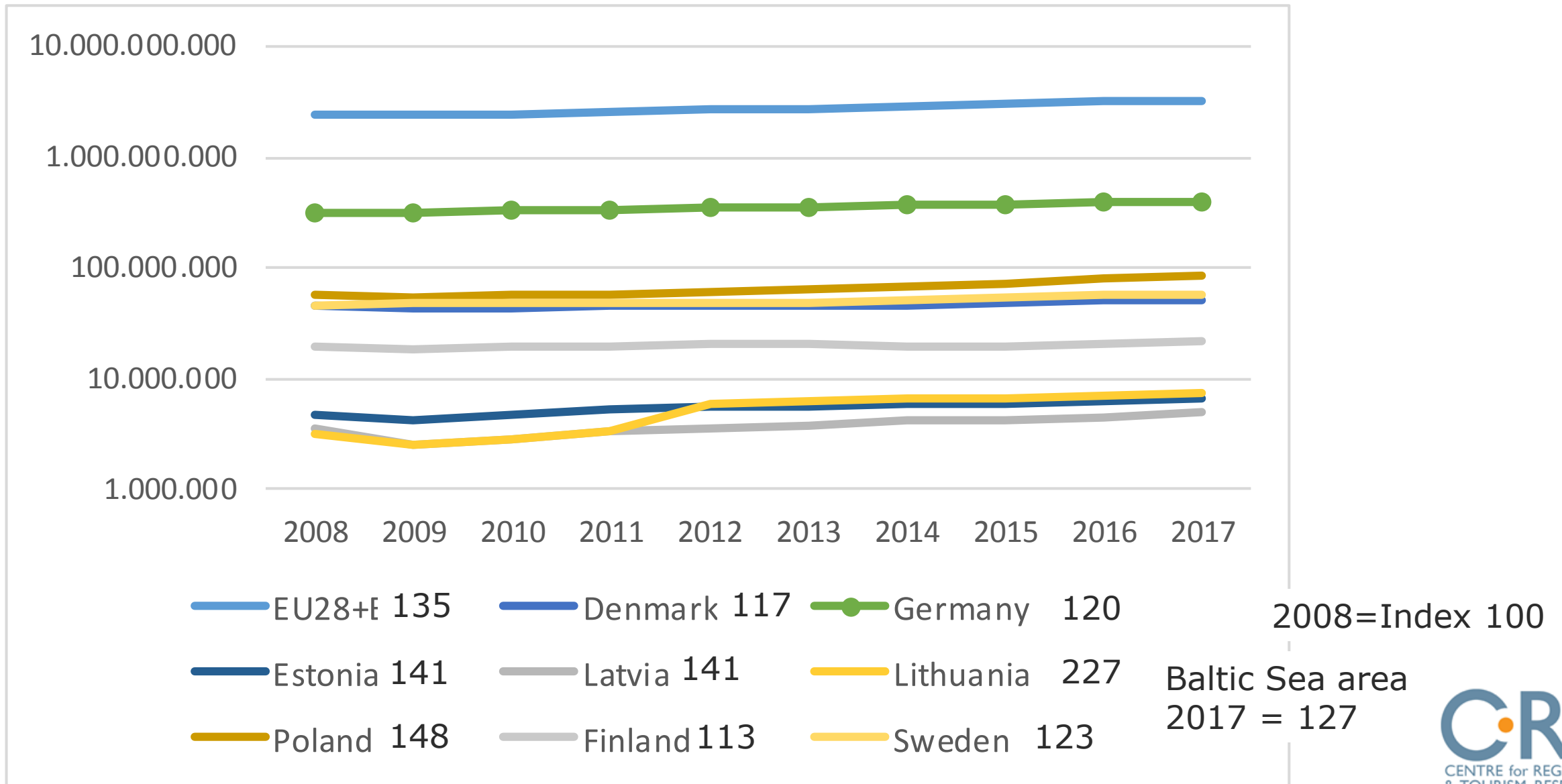
NO. OF REGISTERED TOURIST OVERNIGHTS IN COUNTRIES AROUND THE BALTIC SEA

	2008	2010	2012	2014	2016	2017	2017 index
EU28+EFTA4	2.435.849.136	2.496.553.921	2.686.368.960	2.895.312.484	3.164.765.945	3.281.782.360	135
Denmark (DST)	44.716.826	43.135.540	44.428.455	46.813.559	51.453.932	52.313.730	117
Germany	323.876.009	325.439.525	350.349.425	366.527.398	388.851.871	388.851.871	120
Estonia	4.602.212	4.700.680	5.544.537	5.809.464	6.228.128	6.509.299	141
Latvia	3.501.063	2.834.104	3.546.736	4.158.418	4.416.597	4.950.929	141
Lithuania	3.249.339	2.792.135	5.741.252	6.465.004	6.992.674	7.364.924	227
Poland	56.645.518	55.794.467	62.014.890	66.579.589	79.393.860	83.880.915	148
Finland	19.465.620	19.248.057	20.317.582	19.786.022	20.343.433	21.914.154	113
Sweden	46.540.868	47.900.298	48.585.972	52.280.371	57.234.148	57.234.148	123
Baltic Sea area	502.597.455	501.844.806	540.528.849	568.419.825	614.914.643	623.019.970	124

EUROSTAT:

- Registered bednights per year per country.
- By domestic and foreign; By type of accommodation.
- Even by months; Also by NUTS2 regions per country.
- Overnights can be shown per 1000 inhabitants or area.

NO. OF REGISTERED TOURIST OVERNIGHTS IN COUNTRIES AROUND THE BALTIC SEA + INDEX



OTHER TRENDS IN TRAVEL AND TOURISM

- Shorter and more holidays
- Later bookings
- Internet dominating (info., booking)
- Ageing population (D, DK)
- Population and overnights →→ Cities

THANK YOU
FOR YOUR ATTENTION !

Questions,
comments,
discussion

