

Det polske marked for ferier på Bornholm

- med færger og fly

Bornholm, 22.10.2007

Af Carl Henrik Marcussen, seniorforsker
Center for Regional- og Turismeforskning, www.crt.dk
Baseret på en undersøgelse foretaget for: Task Force Polen

Formålet med undersøgelsen er at pege på:

- Hvordan Bornholm kan skaffe flere polske turister til øen?
- Hvordan det kan lade sig gøre, i højere grad end hidtil, at få de polske gæster til i at overnatte på øen?

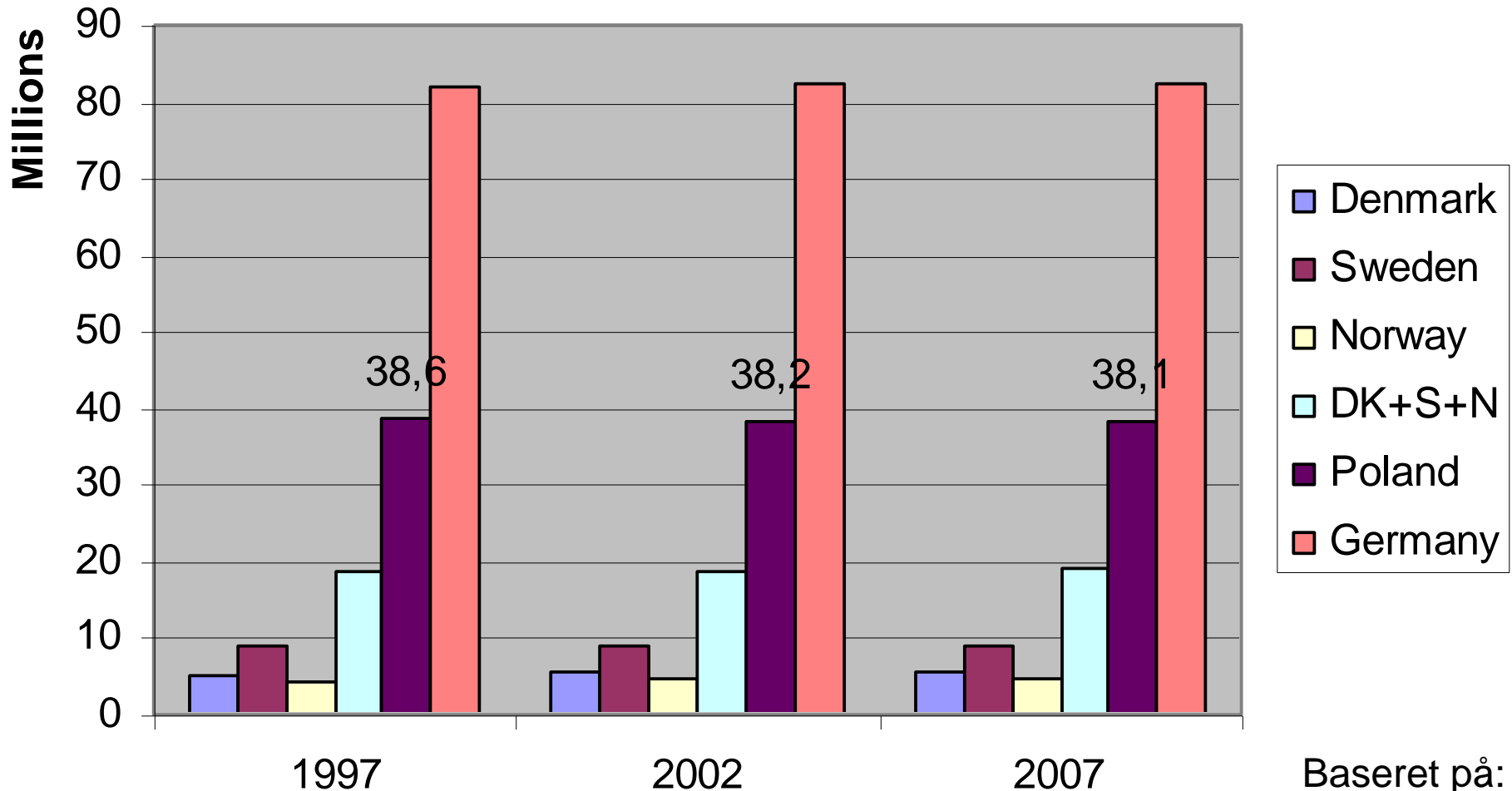
Problemstillinger

- Hvordan ser den opdaterede **statistik** ud for den polske økonomi og den polske udgående internationale turisme? Herunder antal afrejsende til udlandet med fly og færge samt polske overnatninger i Danmark og på Bornholm, fra 2000/2002 til om med 2006 (2007).
- Hvordan er mulighederne for at få flere polakker til Bornholm med **færge**?
- Hvordan er mulighederne for at tilbyde polakkerne **flyrejser** til Bornholm?
- Hvilke **attraktions- og overnatningstilbud** kunne være særligt oplagte for polakker der besøger Bornholm med henholdsvis færge og fly?
- Hvilke muligheder er der for at **markedsføre** Danmark, specifikt Bornholm, i Polen, og hvorledes kan man bedst sælge Bornholm til polakkerne (direkte eller via agenter eller rejsearrangører).

Oversigt

1. Indledning
2. Økonomi og demografi
3. Turismen på Bornholm
4. Færgerejseaktivitet
5. Flyrejseaktivitet
6. Mulighederne for øget turisme fra Polen til Bornholm – med færge
7. Mulighederne for at etablere sommerflyrute mellem Polen til Bornholm
8. Sammenfatning

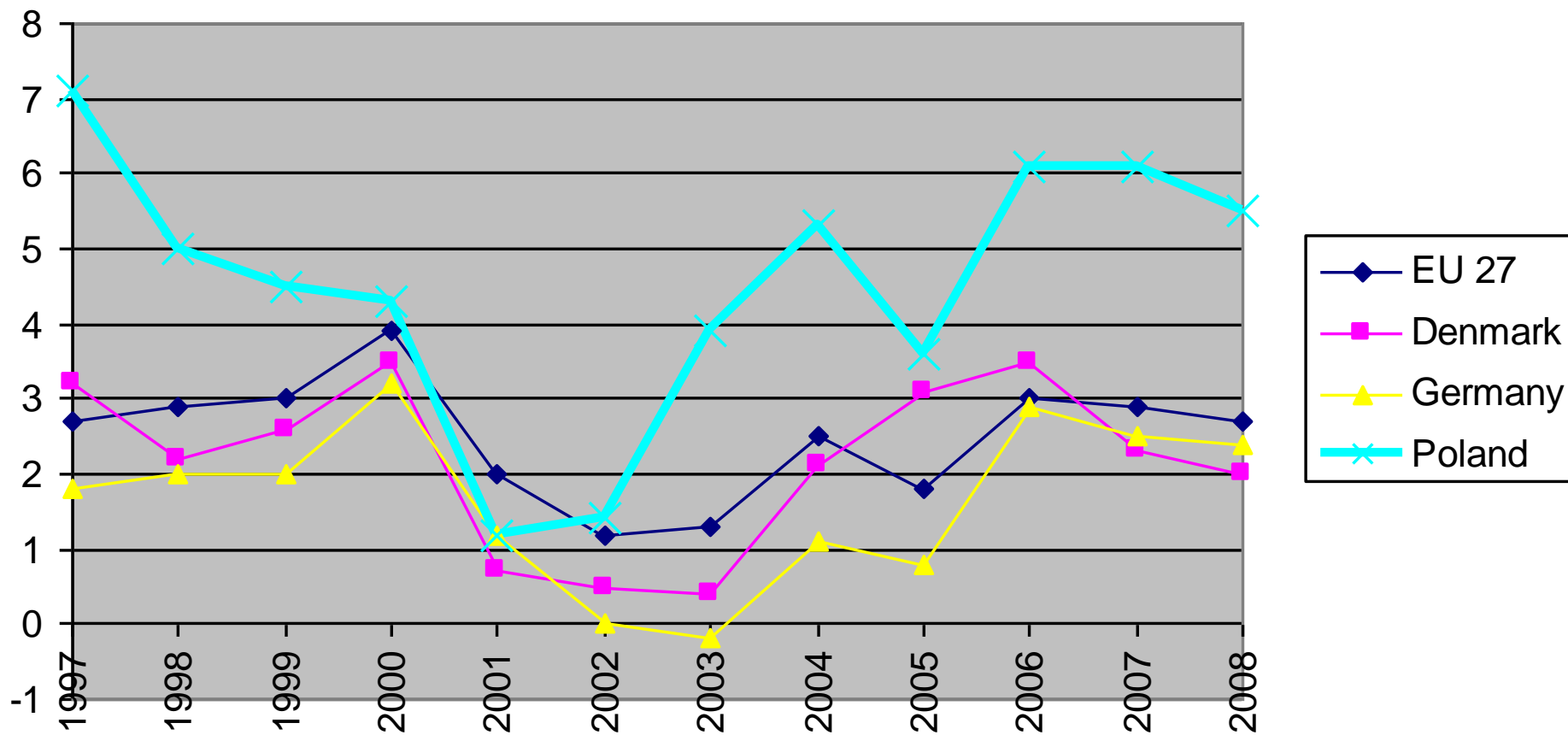
Befolkning: Dobbelt så mange polakker som skandinaver. – Halv så mange polakker som tyskere.



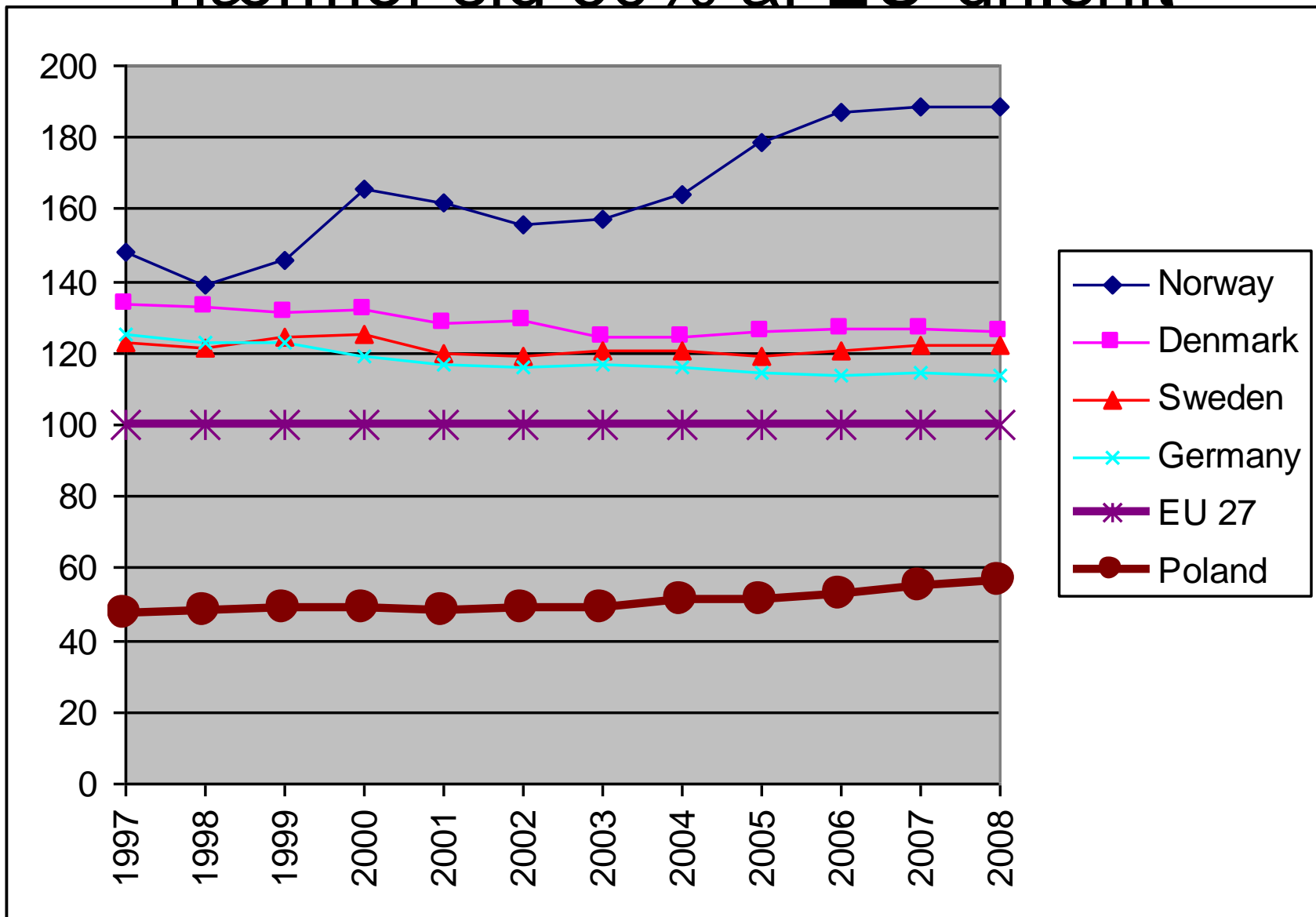
Baseret på:
Eurostat

Væksten i Polen har ligget over EU-snit næsten hvert år de seneste 10 år

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



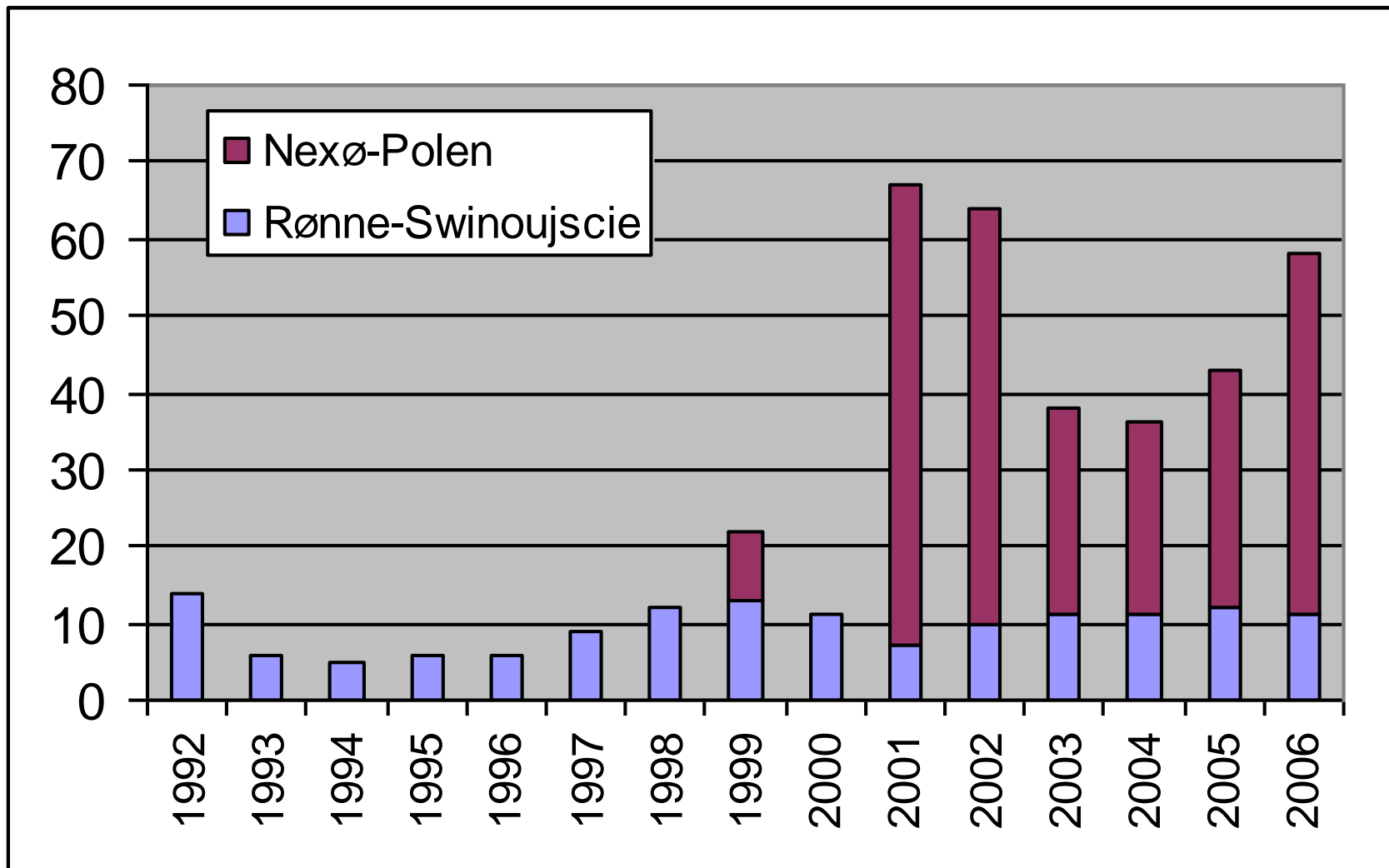
Købekraften pr. indbygger i Polen nærmer sig 60% af EU-gnsnit



Note: GDP per capita in Purchasing Power Standards (PPS) (EU-27 = 100). Eurostat

Næsten 60.000 passagerer Polen-Bornholm p.a.

Number ferry passengers per year Poland-Bornholm 1992-2006 – 2007: About 60.000.



Source: Danmarks Statistik, statistikbanken.dk

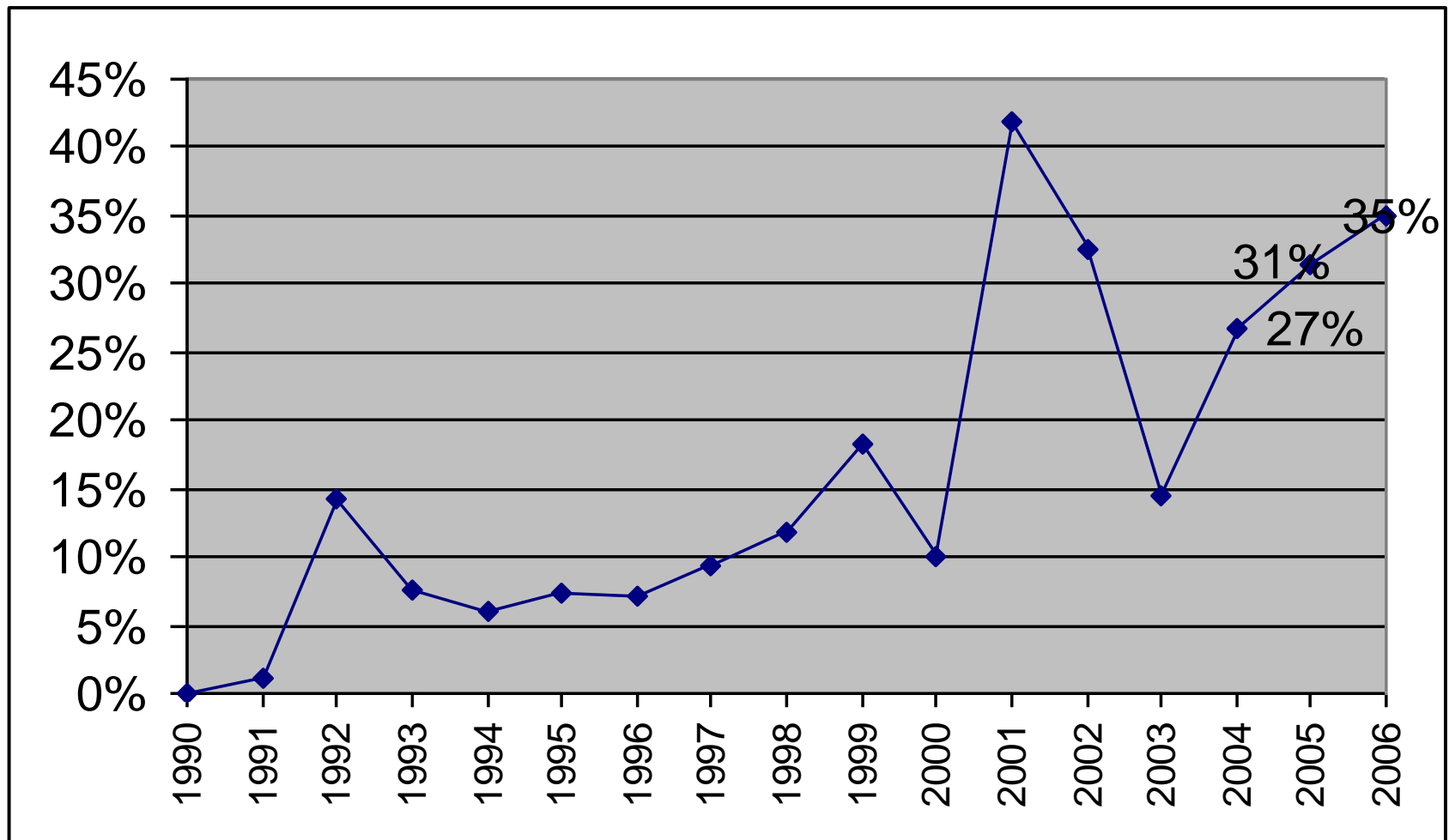
Antal færgepassagerer Poland-Bornholm 2006, 2007

- Nexø: Plus 2% t.o.m. August '07
(739 flere passagerer)
- Rønne: 10 runder i 2007, vs. 11 in '06
(ca. 1.100 passagerer per rundtur)
- $47.000 + 12.000 = 59.000$ in 2006, og ca. det samme antal totalt set i 2007

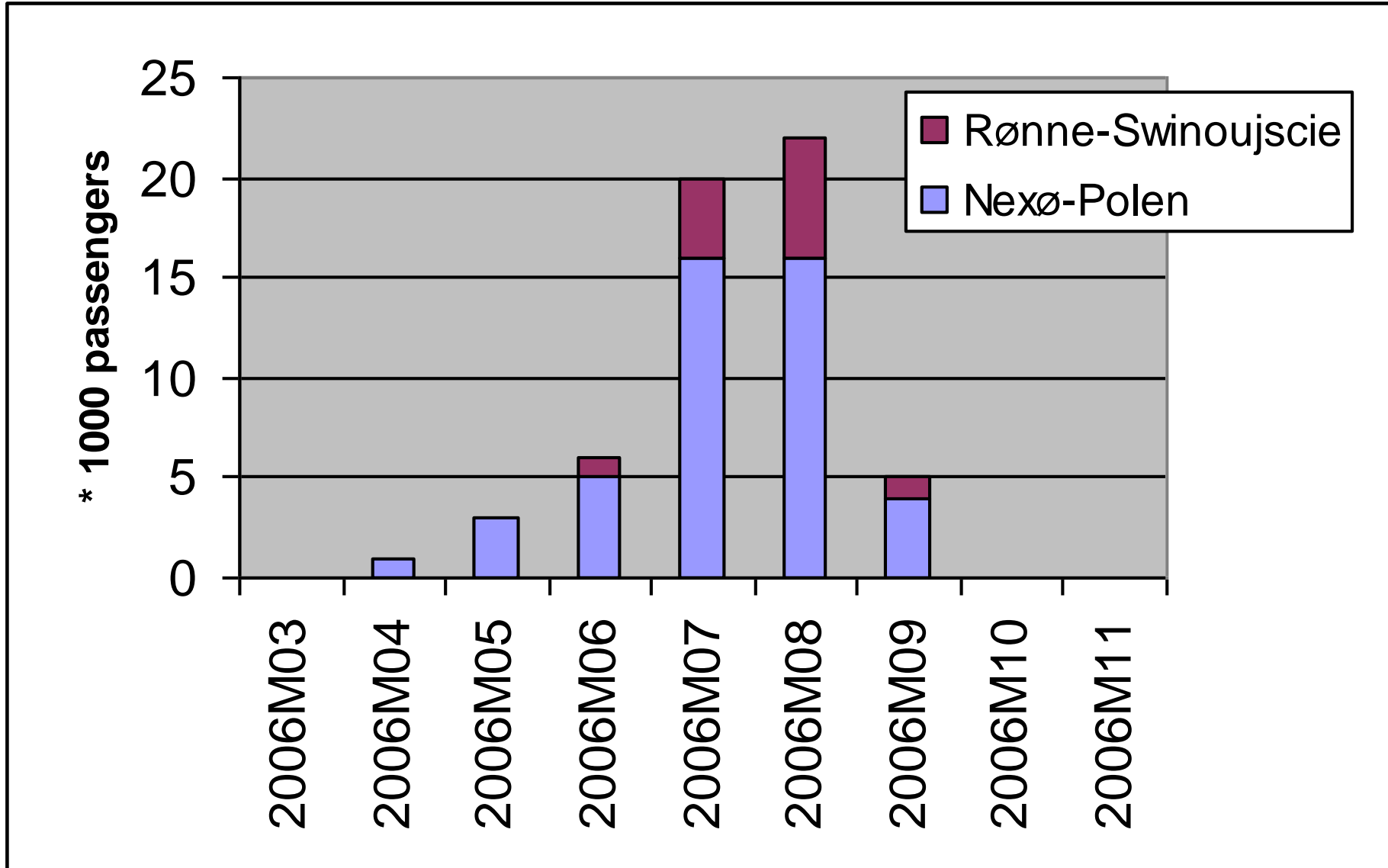
Bornholm havde i 2006:

35% af samtlige færgepassagerer på ruterne mellem Polen og Danmark

- og: 18% af de registrerede polske overnatninger i Danmark

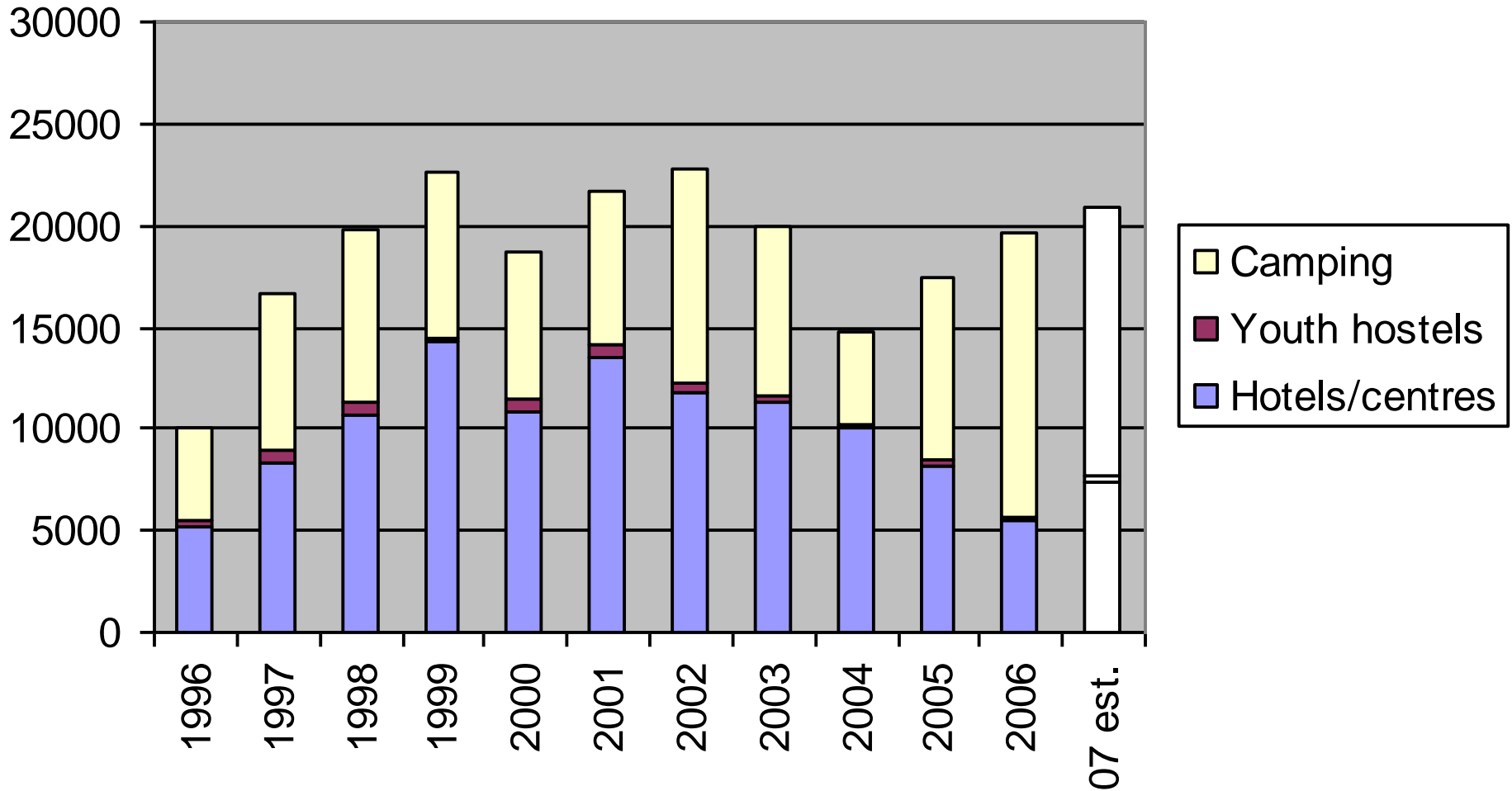


Færgepassagerer pr. måned 2006 – på ruter fra/til Polen-Bornholm



Polske overnatninger på Bornholm

Polish bednights on Bornholm



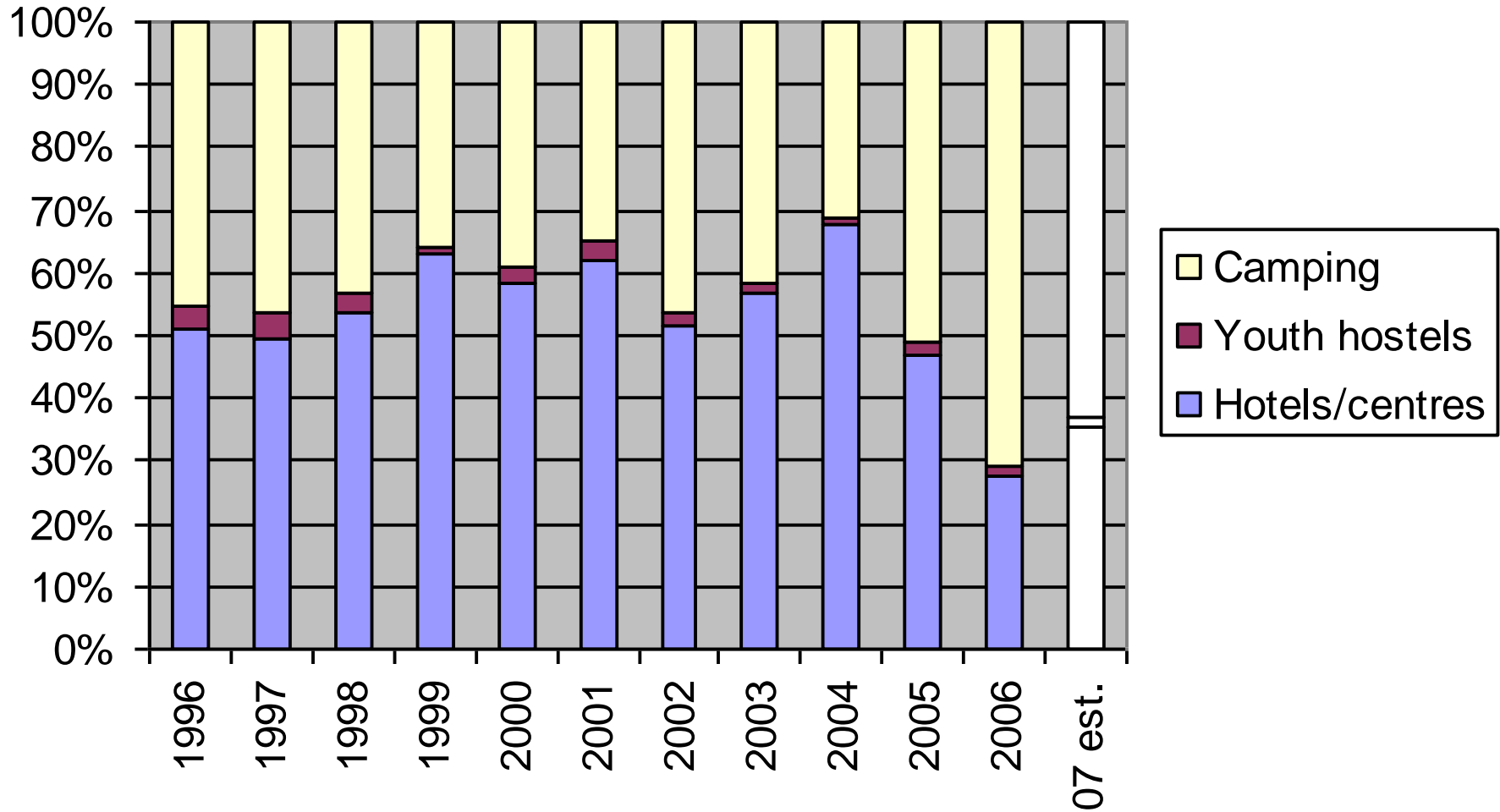
10 procent flere polske overnatninger på Bornholm t.o.m. august 2007 i.f.t. året før

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%	

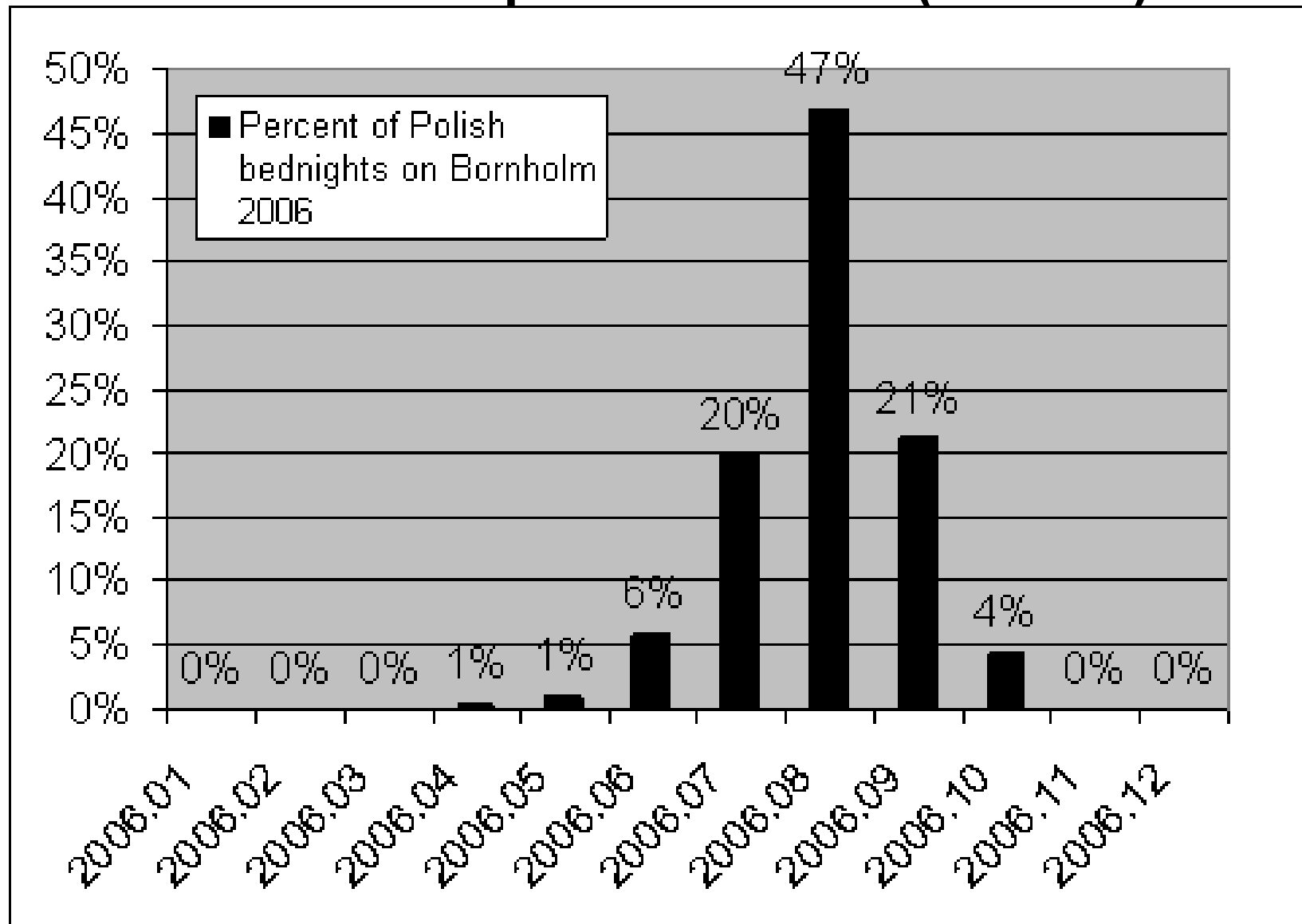
Bornholm	Hotels/centres	Youth hostels	Camping	Three types
All of 2006	28%	1%	71%	100%
Jan-Aug 2006	36%	2%	63%	100%
Jan-Aug 2007	44%	2%	54%	100%

Polske overnatninger på Bornholm

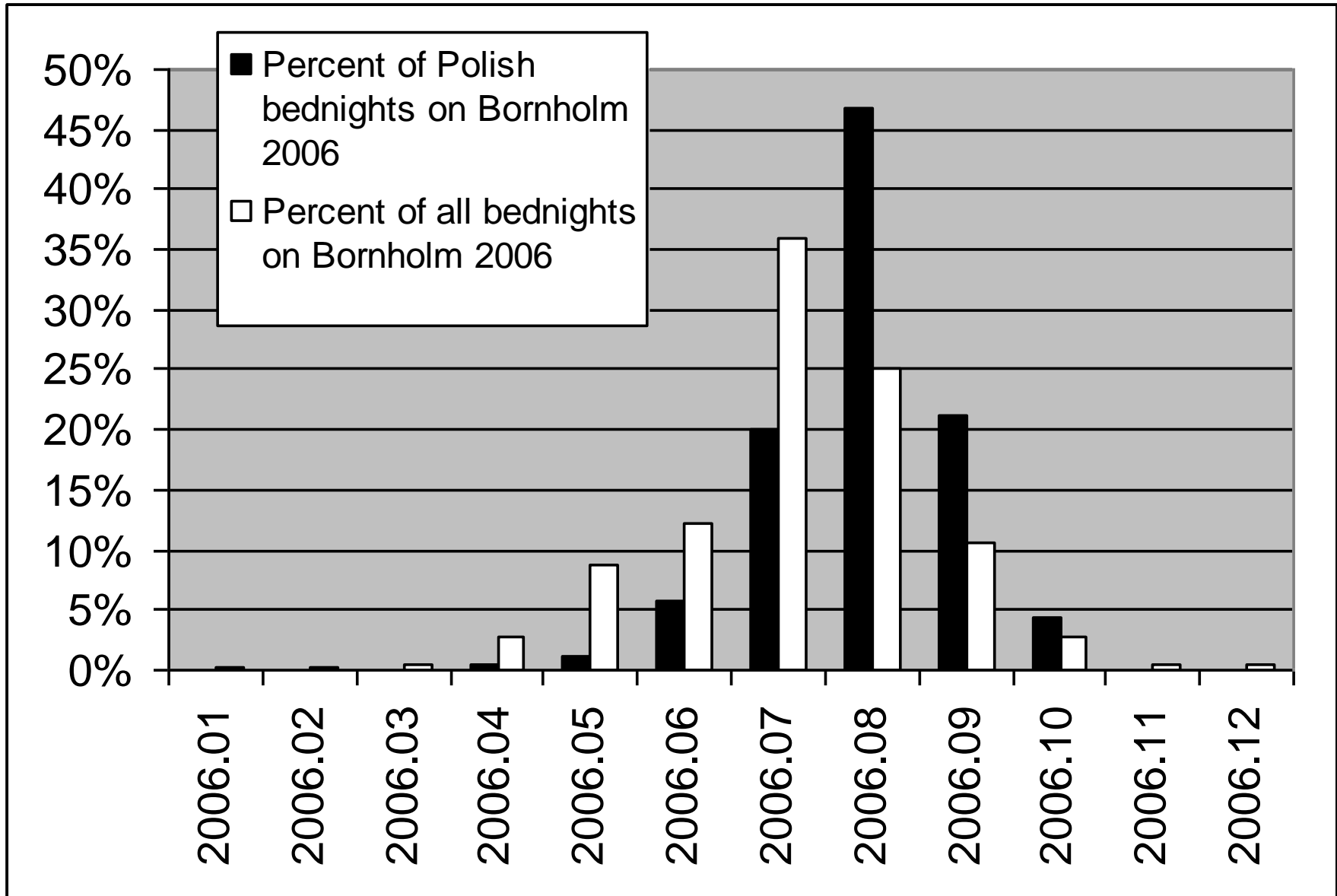
Polish bednights on Bornholm (Percent)



Fordeling af sengenætter på Bornholm pr. måned (2006)



Fordeling af polske og ALLE sengenætter på Bornholm pr. måned (2006)



Populære attraktioner og aktiviteter på Bornholm - blandt polakker

- Natur Bornholm
- Joboland
- Middelaldercentret
- Rundkirkerne
- Museerne
- Sommerfugleparken
- Busrundture
- Cykling

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%

Pr. amt i Polen

- 1) Amtets andel af Polens befolkning (2006)
- 2) Polske gæster via Nexø pr. amt (2006)
- 3) Polske gæster via Rønne pr. amt (2006)
- 4) Interessen for Bornholm pr. amt (henvend.)

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%

Om færge – fra Polen: Nuværende tonnage

- Jantar, KZP, Kolobrzaska Zegluga Pasazerska
 - Lady Assa, Zegluga Gdanska
 - Pomerania (bilfærge), Polferries
-
- BornholmExpress, Chr.Ø-farten
 - Bornholmstrafikken: Stettin, via Sassnitz

Flere med nuværende skibe

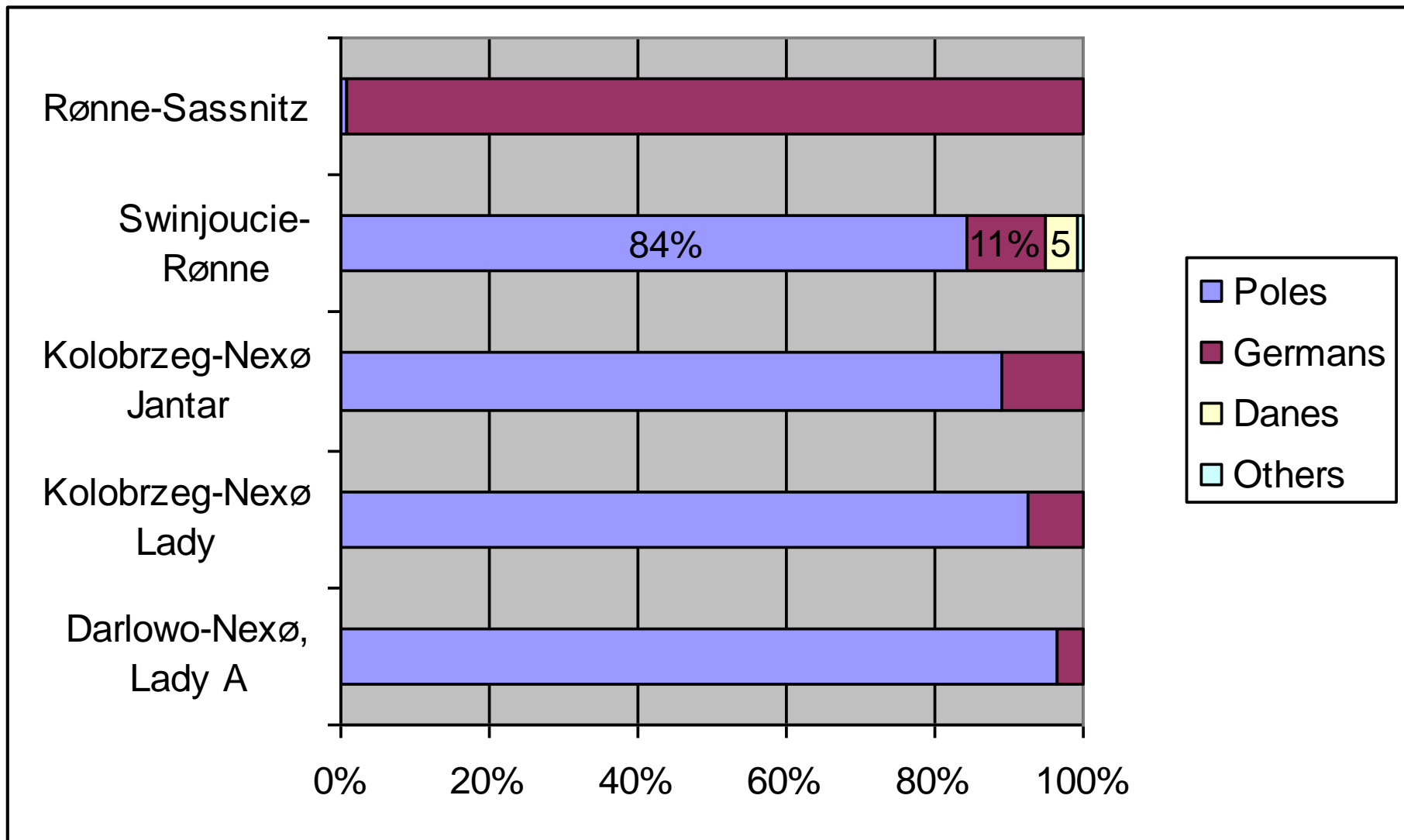
Nexø:

- Længere sejlperiode, højere frekvens

Rønne:

- Længere sejlperiode: Fx flere lørdage
- Evt. mere gunstig prispolitik overfor busser
(→gratis v/min. 25 betalende – i stedet for DKK 1150 pr. vej pr. bus)

Polakker sejler fra Polen, Tyskere sejler fra Tyskland



Evt. helårssejlad – med bilfærge

- Færgesejlad er et modent marked: Passagertallet eksploderer næppe. Skib bør ligge i Polen. Vigtigt med gode salgskanaler, polske.
- Priserne: Med relativ lav gennemsnitsindkomst må man ikke være for optimistisk mht. indtægt pr. passager. Tradition for endagsrejser: Min. 25% rabat. Min. 10% lavere priser udenfor højsæsonen. Gruppe-rabatter.
- I vintermånederne kunne der sejles Tyskland-Bornholm (også). Større efterspørgsel Tyskland-Bornholm end Polen-Bornholm. Usandsynligt, at tyskerne vil køre til Polen.

Rangordning
af
nuværende
og
kommende
mulige
sæson-
afgangs-
lufthavne
t/Bornholm

Polske:

1. Warszawa (19)

2. Katowice (21)

3. Poznan (24)

4. Gdansk (26)

Billund, Hamburg, Oslo .. og?

1	Billund (3*week)	16	Sandefjord Torp
2	Aalborg, DK	17	Cologne-Bonn NW3
3	Hamburg (w/SH)	18	Amsterdam
4	Oslo Gardermoen	19	Warsaw, PL
5	Stockholm Arlanda	20	Hahn (RF+Saarl.)
6	Hanover (NS)	21	Katowice (Krakow)
7	Düsseldorf (NW1)	22	Zürich (ex. overlap)
8	Gothenburg	23	Helsinki
9	Berlin-Brandenburg	24	Poznan
10	Norrköping	25	Basel (ex. overlap)
11	Munich (BY)	26	Gdansk
12	Bremen	27	Brussels (100% B)
13	Stuttgart (BW)	28	Paris
14	Frankfurt (HS)	29	London
15	Münster (NW2)	30	Milan (Lombardia)
		31	Vienna (50% of A)

Rangordning af nuværende og kommende mulige sæson- afgangs- lufthavne t/Bornholm

	Airport	Criteria	Criteria	Criteria
		1:	2:	3:
		Requests	Catchment	Distance
1	Billund (3*week)	3250	1,7	352
2	Aalborg, DK	842	0,5	502
3	Hamburg (w/SH)	587	5,2	327
4	Oslo Gardermoen	559	1,6	628
5	Stockholm Arlanda	558	2,5	673
6	Hanover (NS)	524	6,7	474
7	Düsseldorf (NW1)	424	11,3	720
8	Gothenburg	386	1,5	327
9	Berlin-Brandenburg	372	6,0	309
10	Norrköping	276	1,0	527
11	Munich (BY)	240	12,4	866
12	Bremen	238	1,8	425
13	Stuttgart (BW)	235	10,7	912
14	Frankfurt (HS)	213	6,1	808
15	Münster (NW2)	209	2,2	596
16	Sandefjord Torp	189	0,6	586
17	Cologne-Bonn NW3	186	4,8	742
18	Amsterdam	165	15,7	787
19	Warsaw, PL	158	5,1	527
20	Hahn (RF+Saarl.)	97	5,1	919
21	Katowice (Krakow)	78	8,0	654
22	Zürich (ex. overlap)	83	3,8	1126
23	Helsinki	65	2,1	930
24	Poznan	63	3,4	303
25	Basel (ex. overlap)	50	2,1	930
26	Gdansk	49	2,2	348/248
27	Brussels (100% B)	40	10,4	913
28	Paris	29	9,6	1215
29	London	29	7,4	1186
30	Milan (Lombardia)	28	9,1	1425
31	Vienna (50% of A)	25	4,0	959

Om Billund-Bornholm iflg. Survey: Kører dem fra Nordjylland til BLL?

- 70% af de rejsende på ruten Billund-Bornholm kom fra en radius på 100 km fra BLL.
 - Yderligere 5% kom fra Bornholm, i.e. 75% i alt.
 - Andre 10% kom fra Sønderjyllands Amt.
 - 6% kom fra Viborg Amt
 - **8% kom fra Nordjylland Amt**
-
- Aalborg-RNN direkte ville tage en del passagerer fra ruten CPH-RNN

Om HAMBORG-RNN iflg. Survey: Kører dem fra øvrige Tyskland til Hamborg?

- 6% af befolkningen bor i SH, HH og Bremen.
- 18% af interessen for Bornholm kommer fra do.
- 59% af de tyske rejsende på ruten Hamborg-Bornholm kom SH, HH og Bremen

På sigt evt.:

- Düsseldorf (eller Münster)
- Berlin

Om fly

- Passagerer fra **Aalborg** er relativt villige til at skifte i København
- **Stockholm**: Mindst samme potentiale som Oslo. Men dog ikke køre gennem 3. land.
- Polen: Primært **Warszawa**,
- Sekundært: **Katowice**, Poznan, Gdansk
- Men **det ser svært ud** med fly fra Polen

Sidste slide:

Om fly (fortsat)

- Polske ruteflyselskaber
- Skandinaviske ruteflyselskaber
- Charter

Men selv med sommerruteflyvning må rejsearrangører ind i billedet.

Rejsearrangørerne er også vigtige ved færgebaserede rejser.

Resume af priseksempler

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

Appendix A

The Polish Market for Holidays on Bornholm

by Sea and Air

Bornholm, 22.10.2007

By Carl Henrik Marcussen, senior researcher
Centre for Regional- and Tourism Research, www.crt.dk
Based on research being undertaken for: Task Force Poland

Overview

1. Introduction
2. Economy and demographics, Poland
3. Tourism on Bornholm
4. Ferry travel – to/from Poland, to/from Bornholm, Poland-Bornholm.
5. Air travel – from/to Poland, to/from Bornholm
6. Possibilities of increased tourism from Poland to Bornholm – by sea
7. Possibilities of establishing summer route between Poland and Bornholm – by air
8. Summary

The purpose of the study is to investigate the following:

- How can Bornholm get more tourists to the island from Poland?
- How would it be possible to encourage the Polish visitors to stay longer on Bornholm?

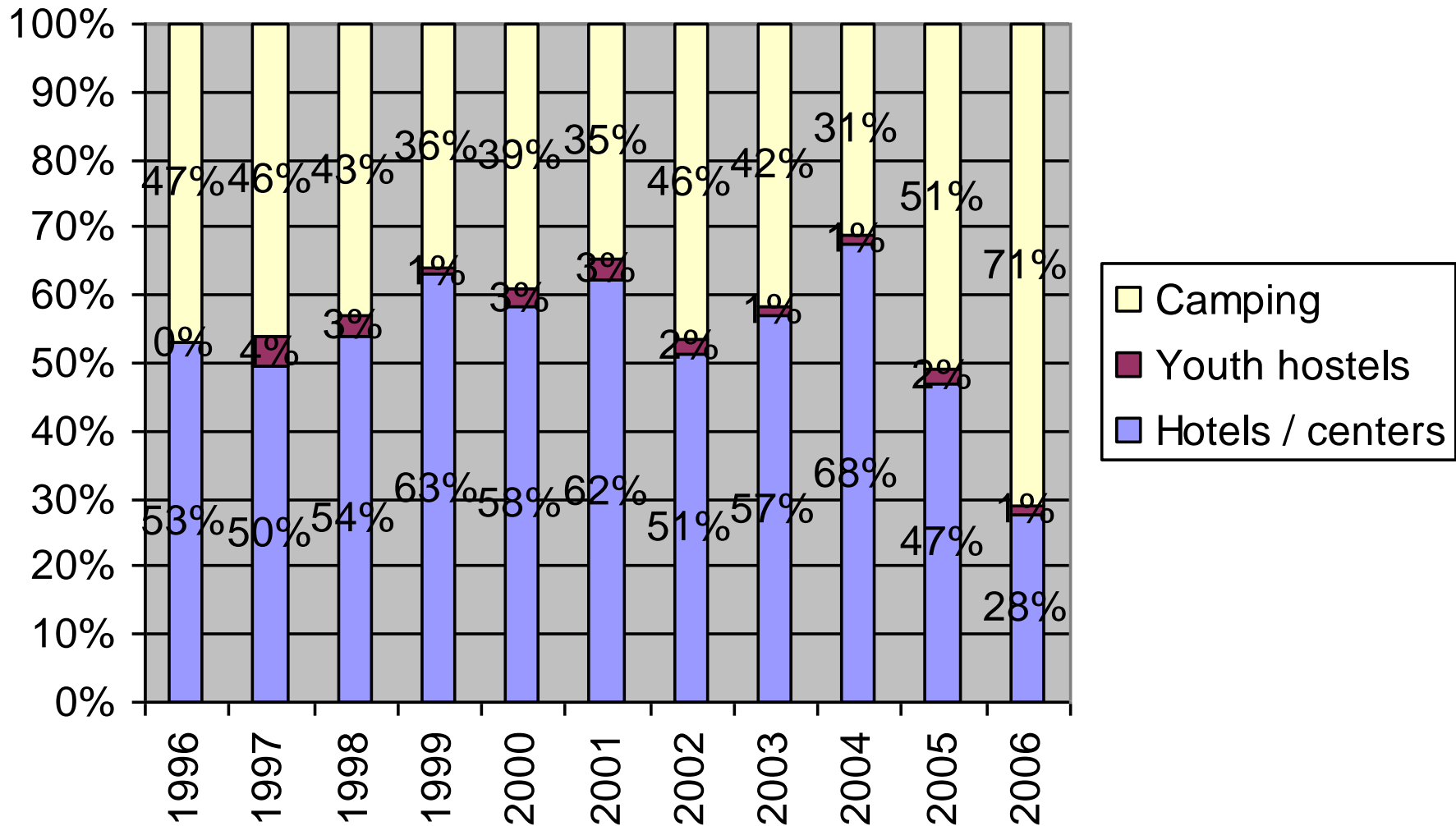
Issues to be investigated

- What do the updated statistics for the Polish economy and the outgoing Polish international tourism look like? Hereunder number of passengers departing by airplanes and ferries as well as Polish bednights in Denmark and on Bornholm, from 2000 or 2002 to and including 2006 - or 2007?
- What are the possibilities of getting more Polish visitors to Bornholm by ferry?
- What are the possibilities of offering the poles airtours 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)?

Number ferry passengers per year Poland-Bornholm 2006 – 2007

- Nexø: Plus 2% till end of August '07 (739 passengers more)
- Rønne: 10 rounds in 2007, vs. 11 in '06 (around 1.000 passengers per round)
- $47.000 + 12.000 = 59.000$ i 2006, and about the same in total in 2007

Polish bednights on Bornholm



Per county in Poland

- 1) Population in percent by county (2006)
- 2) Polish guests via Nexø by county (2006)
- 3) Polish guests via Rønne by county (2006)
- 4) Interest in Bornholm by county (based on information requests sent to bornholm.info, '05)

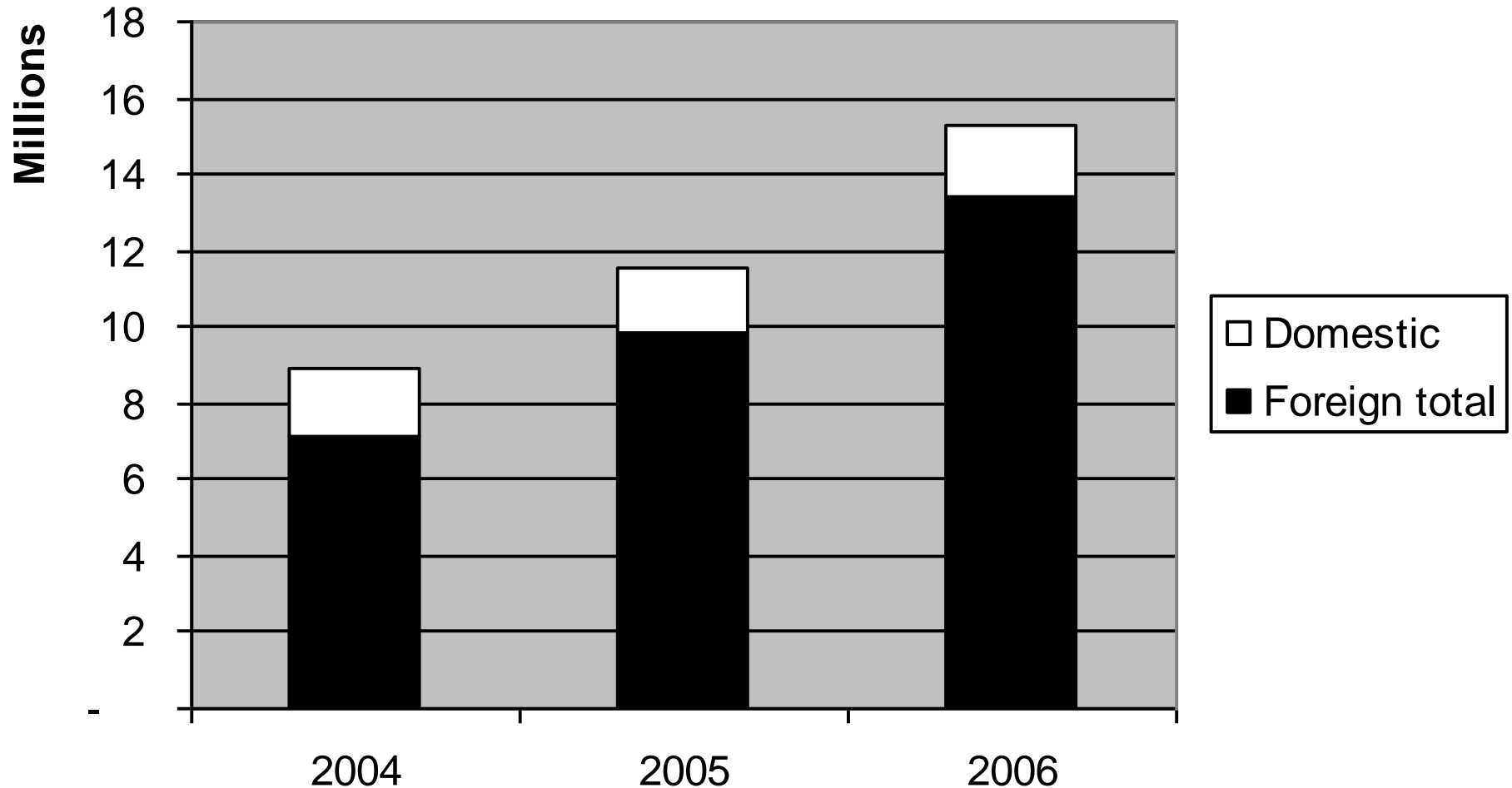
Number of air routes in and from Poland

Routes	2004	2005	2006
National	8	10	10
International	61	97	128
Air routes	69	107	138

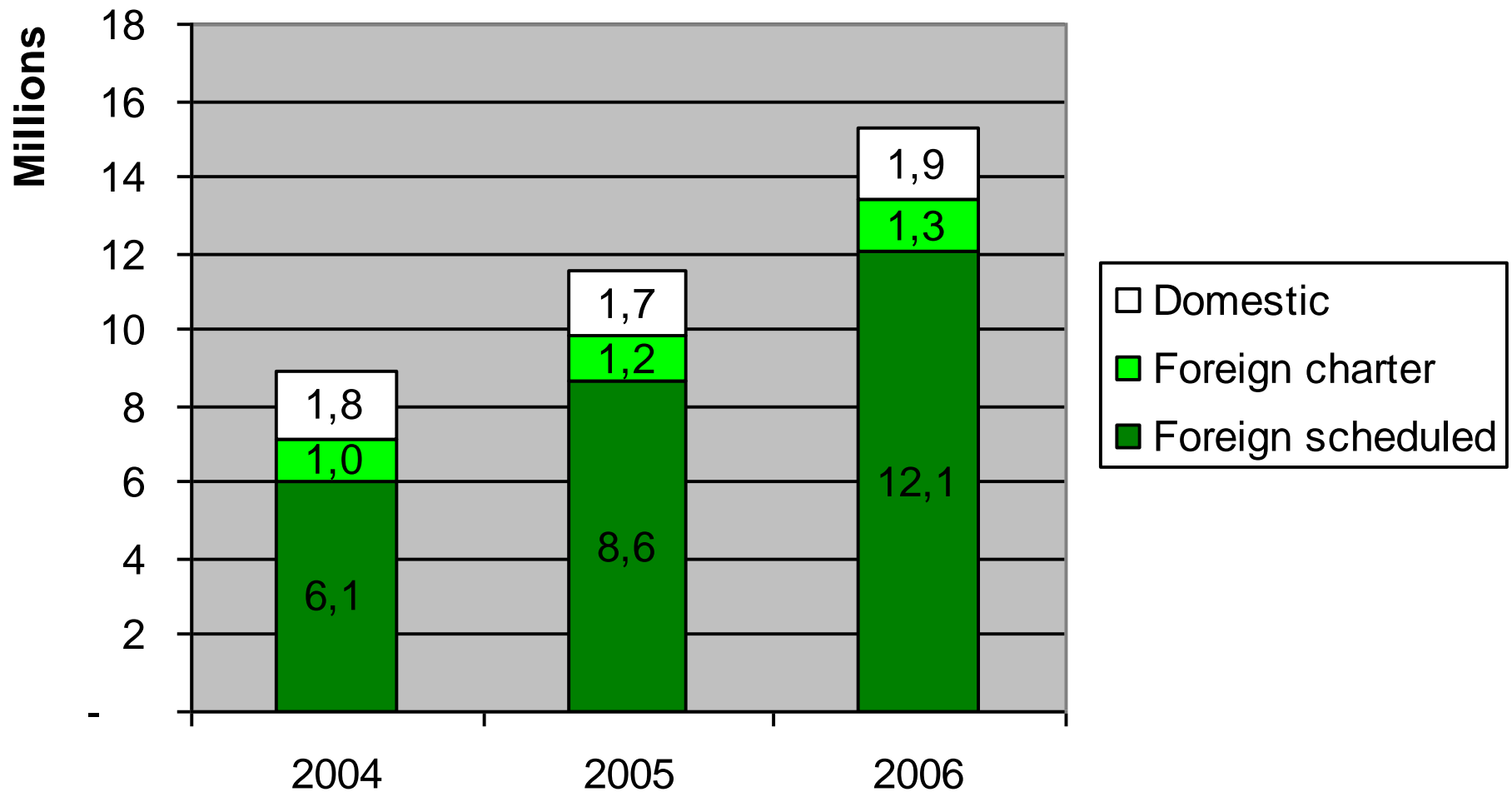
Distances – by air - km

- Warsaw - London 1469
- Warsaw - Copenhagen 666
- Warsaw - Berlin 523
- Warsaw - Bornholm 523 (same)

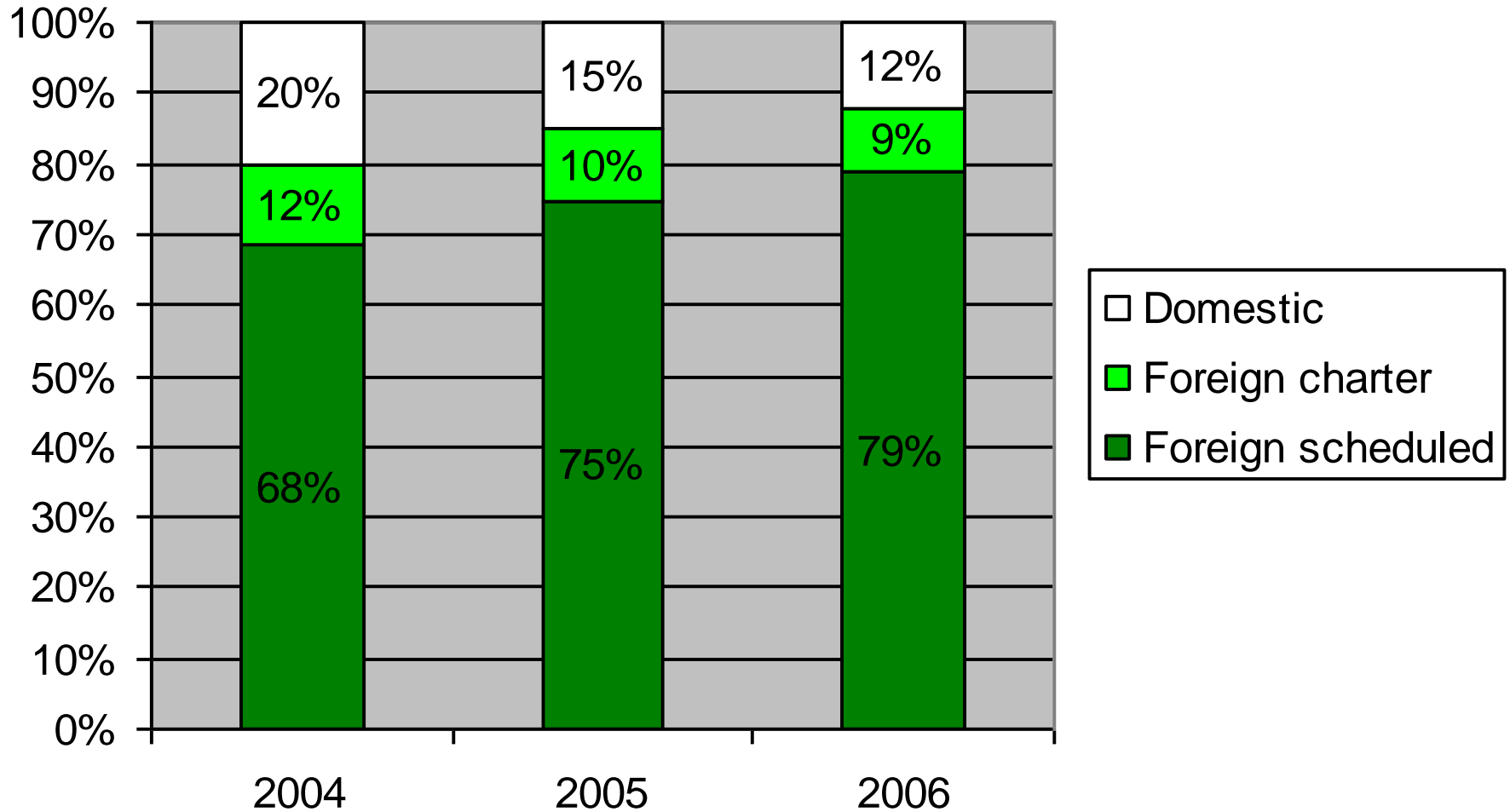
Air passengers to/from Poland



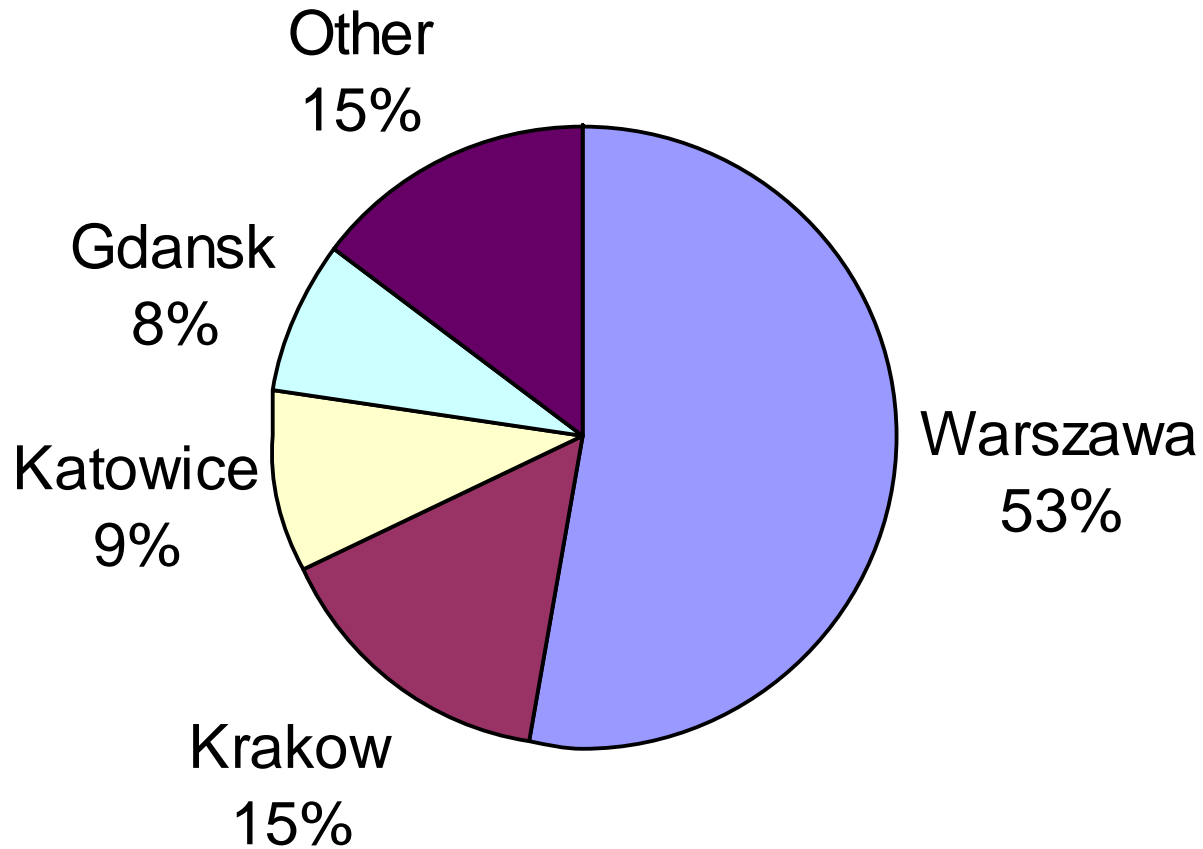
Air passengers to/from Poland



Air passengers to/from Poland

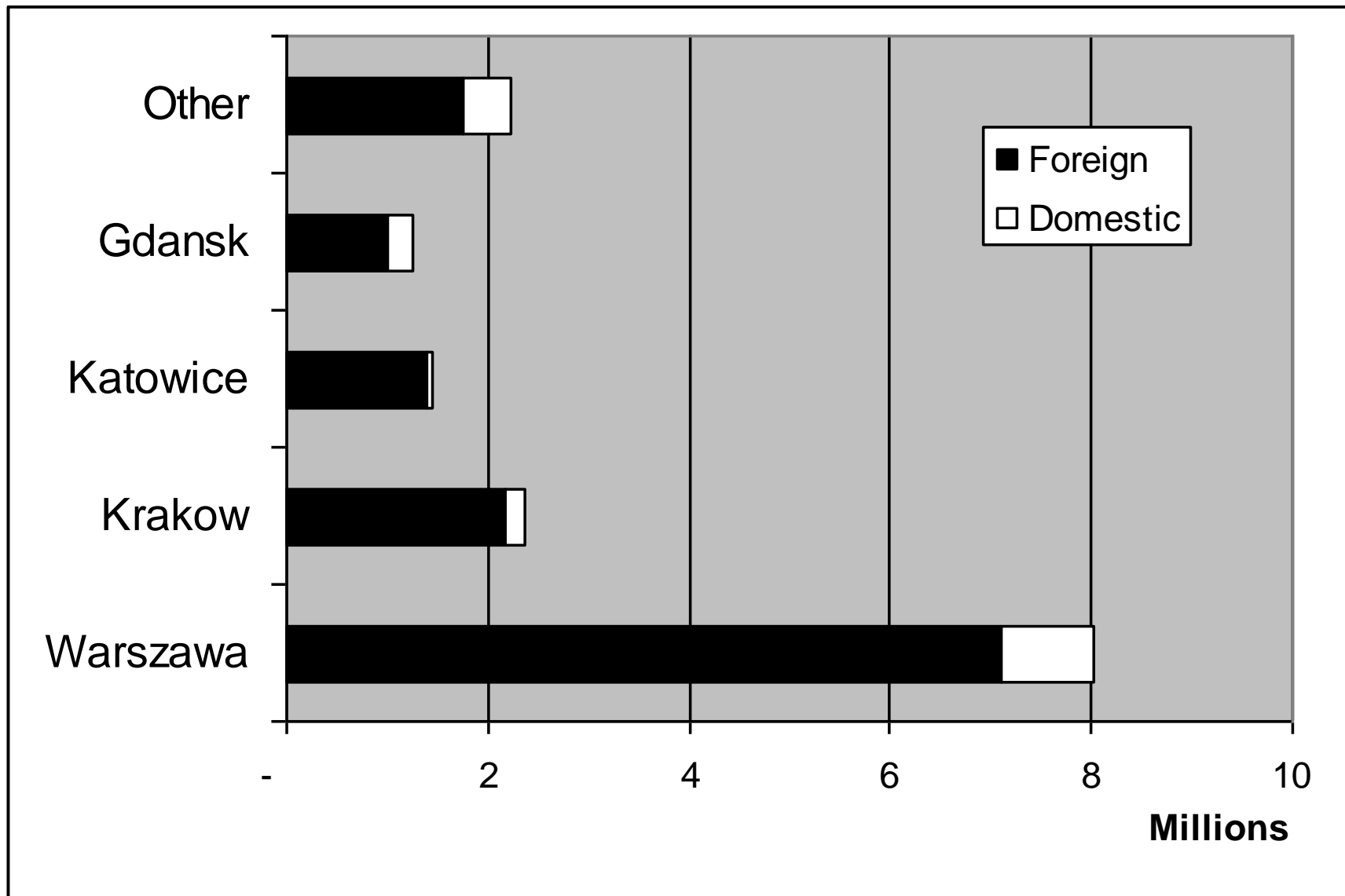


Top 4 airports in Poland - 2006



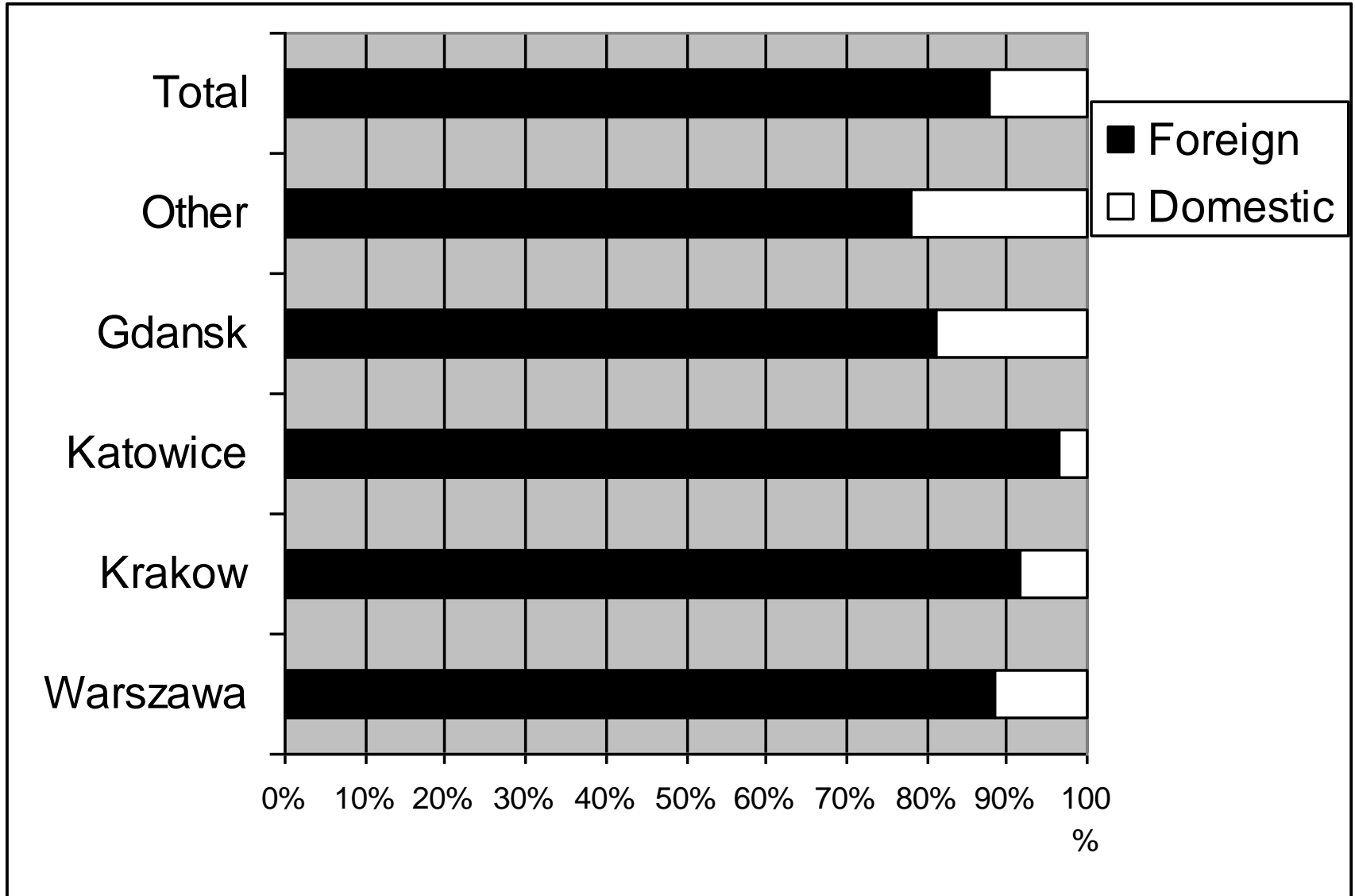
Top 4 airports in Poland – 2006

Domestic and international

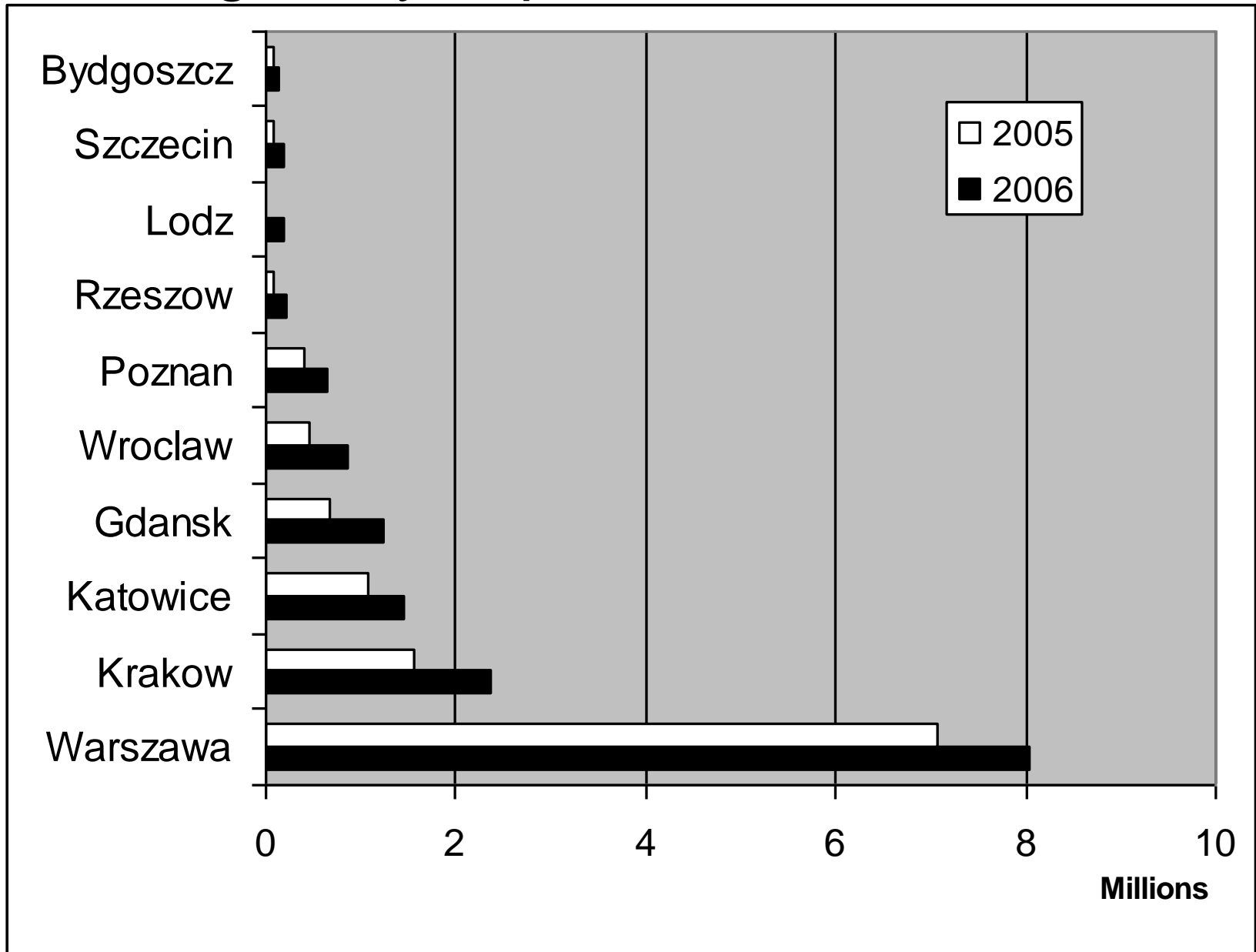


Top 4 airports in Poland – 2006

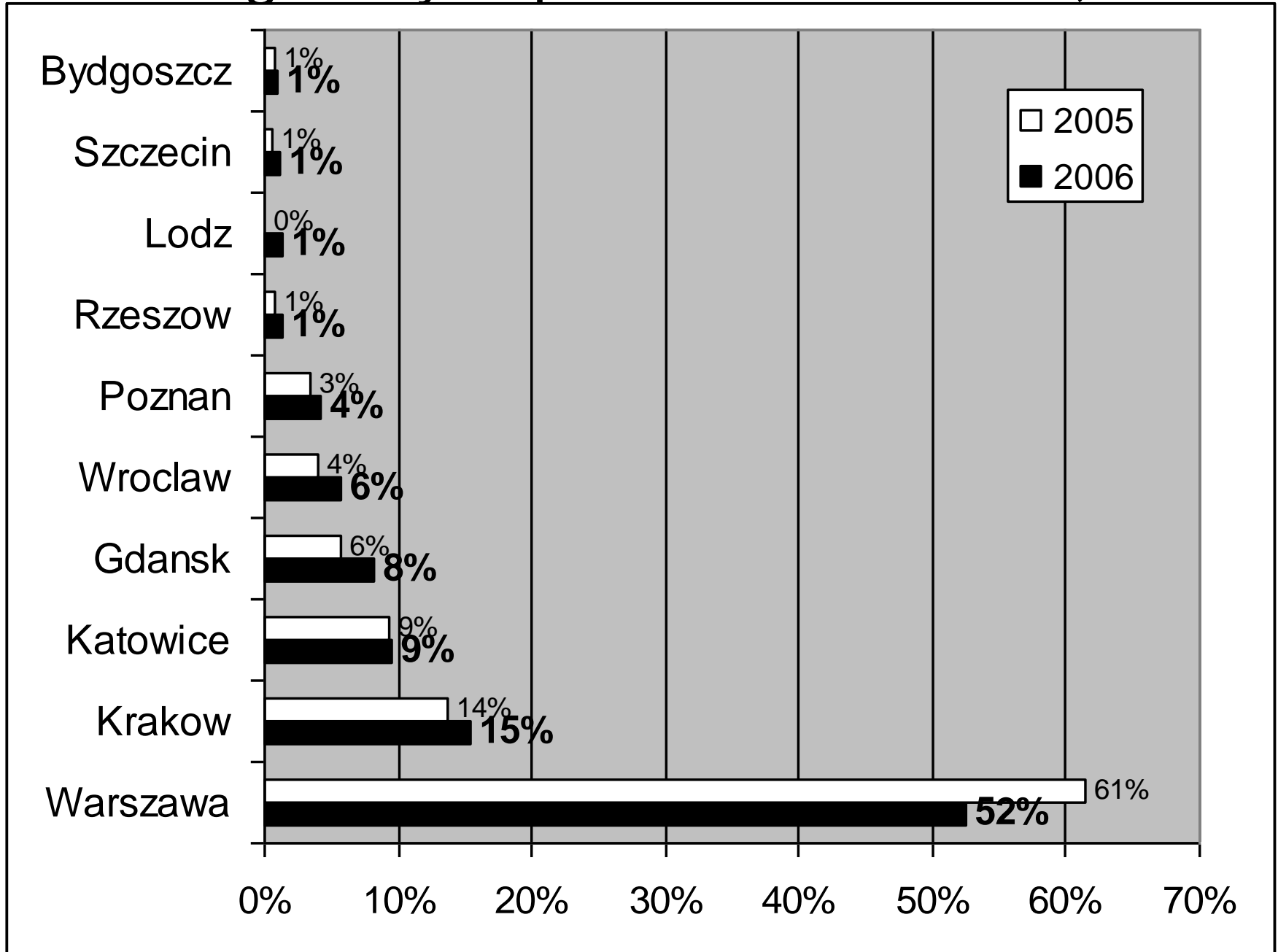
Domestic and international



Passengers by airport in Poland 2005, 2006



Passengers by airport in Poland 2005, 2006

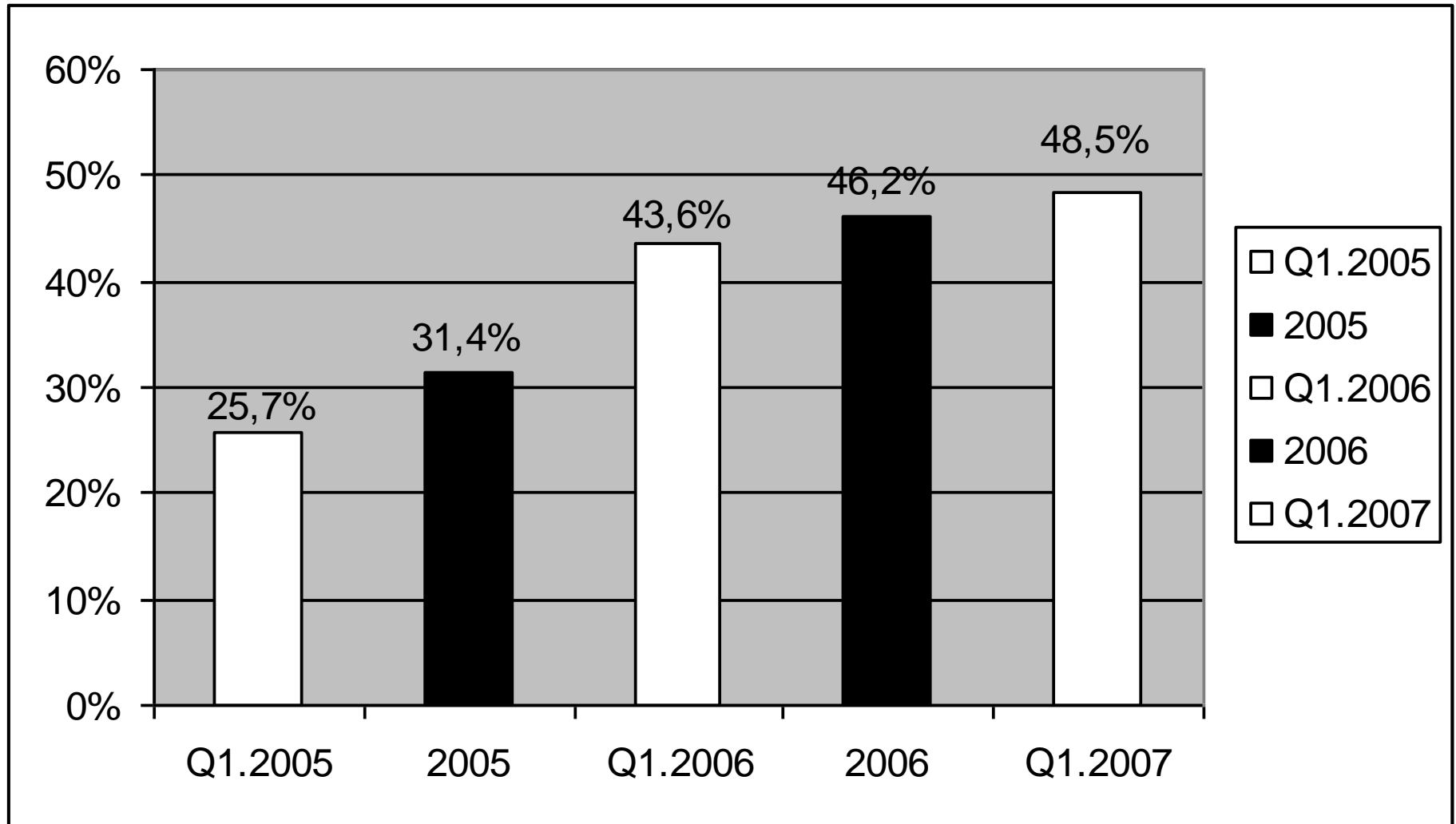


Number of
international
air
passengers
to/from
Poland by
country

	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%

Source: Central Statistical Office
"Transport – Activity Results
in 2006". <http://www.stat.gov.pl>

Share of the LCCs, Low Cost Carriers (Airlines)



Top airlines by number of passengers to/from Poland 2006

L.P.	NAZWA PRZEWOZNIKA	Łączna		zmiana udziału w pkt. %
		SUMA 2006	udział	
1.	LOT POLISH AIRLINES	4 715 236	33,58	-10,23%
2.	WIZZAIR LCC	2 069 481	14,74	2,74%
3.	RYANAIR LCC	1 545 251	11,01	8,48%
4.	CENTRALWINGS LCC	1 055 434	7,52	2,70%
5.	LUFTHANSA DEUTSCHE AIRLINES	706 103	5,03	-0,99%
6.	SKYEUROPE LCC	574 117	4,09	-0,49%
7.	EASYJET LCC	444 246	3,16	-0,87%
8.	BRITISH AIRWAYS	291 390	2,08	-0,67%
9.	GERMANWINGS LCC	283 502	2,02	0,07%
10.	AIR FRANCE	262 819	1,87	-0,16%
11.	NORWEGIAN AIR SHUTTLE LCC	258 034	1,84	1,30%
12.	ALITALIA	235 316	1,68	-0,07%
13.	SCANDINAVIAN AIRLINES SYSTEM	232 553	1,66	-0,86%
14.	AER LINGUS LCC	232 307	1,65	0,84%
15.	ROYAL DUTCH AIRLINES	209 595	1,49	-0,65%

Source: Passenger transportation in regular air traffic, www.pata.pl

LCC = Low Cost Carrier

Poland's largest tour operators

- 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.

Source: www.tourismtrade.org.uk

Tourism trade fairs - Poland

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.

2007: 24-27 Oct.

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.

2007: 20-22 Sept.

Source: www.tourismtrade.org.uk

Also: www.tour-salon.pl/en

www.ttwarsaw.pl/ (c/o www.mtpolska.com.pl)

Can we get a summer route to
Bornholm Airport from Warsaw?

Maybe, maybe not.

Time will tell.

Appendix B

Number of air routes in and from Poland, and lenght

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%

Air passengers to/from Poland

	Foreign total	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%
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Passengers by airport in Poland 2005, 2006

	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%
	11.514.071	15.318.825	3.804.754	33%

Top airlines by number of passengers to/from Poland 2005 and 2006

L.P.	NAZWA PRZEWOZNIKA	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%

16-56: Left out

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