

Analyses of the development of the local tourist sector in the field of marine passenger/car transport from Darłowo to Bornholm

INSTITUTE OF MARKET INFORMATION DPCONSULTING - 2011

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INTRODUCTION

The aim of this report is to show the purposefulness of creating a passenger/car ferry route from Darłowo to Bornholm and the conditions that have to be fulfilled.

In order to set up a passenger/car ferry route it is necessary to have relevant infrastructure in the port and its vicinity. This comprises of:

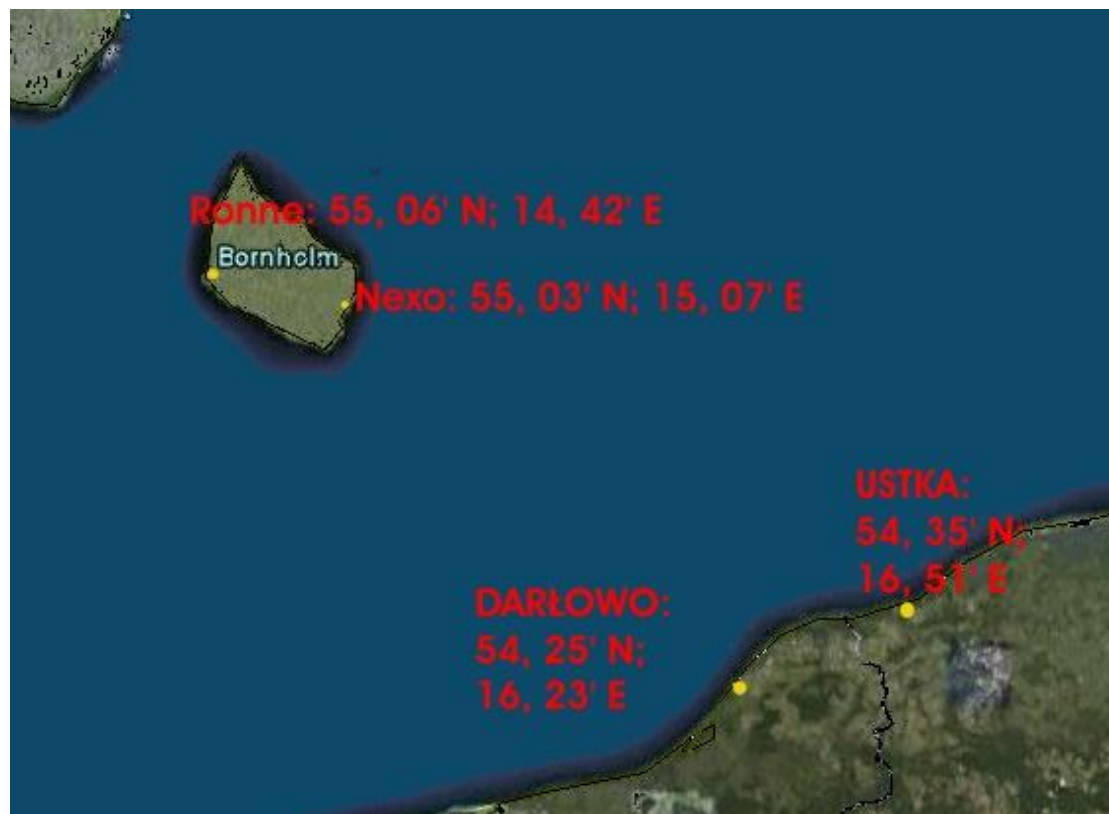
1. The size of the port must allow for the entrance of vessels of such dimensions as to enable the boarding of cars
2. Platforms enabling the boarding of cars
3. Parking space for cars awaiting boarding. The parking space must be large enough to enable the orderly arrangement of awaiting cars and their efficient boarding .
4. Equipment regulating and controlling the entrance of cars to the parking space.
5. A terminal for passengers without cars. Its main aim is to give shelter in case of bad weather whilst awaiting boarding and to provide toilets. Shops, restaurants etc. at the terminal are not essential for passengers – where the terminal is located by promenades, walking areas, cafeterias and shopping centres. However it is advisable, especially in our climatic region, to enable the passengers without cars to board in such a manner so as to be protected from wind, rain etc.
6. Convenient access ways to the port.
7. Roads leading to the city of an adequate capacity.

Apart from the infrastructure, the awareness and willingness to use the ferry connection by potential passengers is essential. This signifies the necessity of identifying the communication channels which will reach potential passengers and encourage them to use the ferry connection.

This report will assess the infrastructure already present in Darłowo, what needs to be changed and what activities should be carried out in the area of promotion.

This report does not refer to the city's development plans, as the survey's aim was not to establish how to incorporate the conditions of the ferry connection with the planned activities, but to show the necessary actions enabling such a connection.

The attractiveness of the city to foreign tourists was not assessed.



CURRENT STATE

Darłowo

The current state of the infrastructure necessary to open a passenger/car ferry connection in Darłowo is as follows:

1. The maximum length of a vessel which can enter the port is 75 meters, however, the Port Captain may allow the entrance of larger vessels.
2. The maximum width of a vessel which can enter the port is determined by the narrowing of the water track and amounts to about 15 meters.
3. The maximum submersion of a vessel which can enter the port is 4 meters, however, the Port Captain may allow the entrance of larger vessels.
4. The maximum length of a vessel which can turn about in the port is 85 meters.
5. No infrastructure enabling car boarding.
6. Lack of parking space for cars awaiting boarding.
7. No passenger terminal.
8. The new Nadmorska street is being built, giving access to the port in 2012.
9. Train connection to Darłowo.
10. Darłowo has the following, important for tourists, road connections with the rest of the country: regional road 203, regional road 206 and national road 37. In order to reach the port it is necessary to drive through the city. During the summer the access ways to Darłowo are sometimes jammed.
11. Tourist accommodation in the city does not influence the intensity of ferry departures from Darłowo. The ferry port in Darłowo will influence areas far from the city along the sea and inland.

About 490 thousand tourists per year come to Darłowo (from Darłowo City Council)

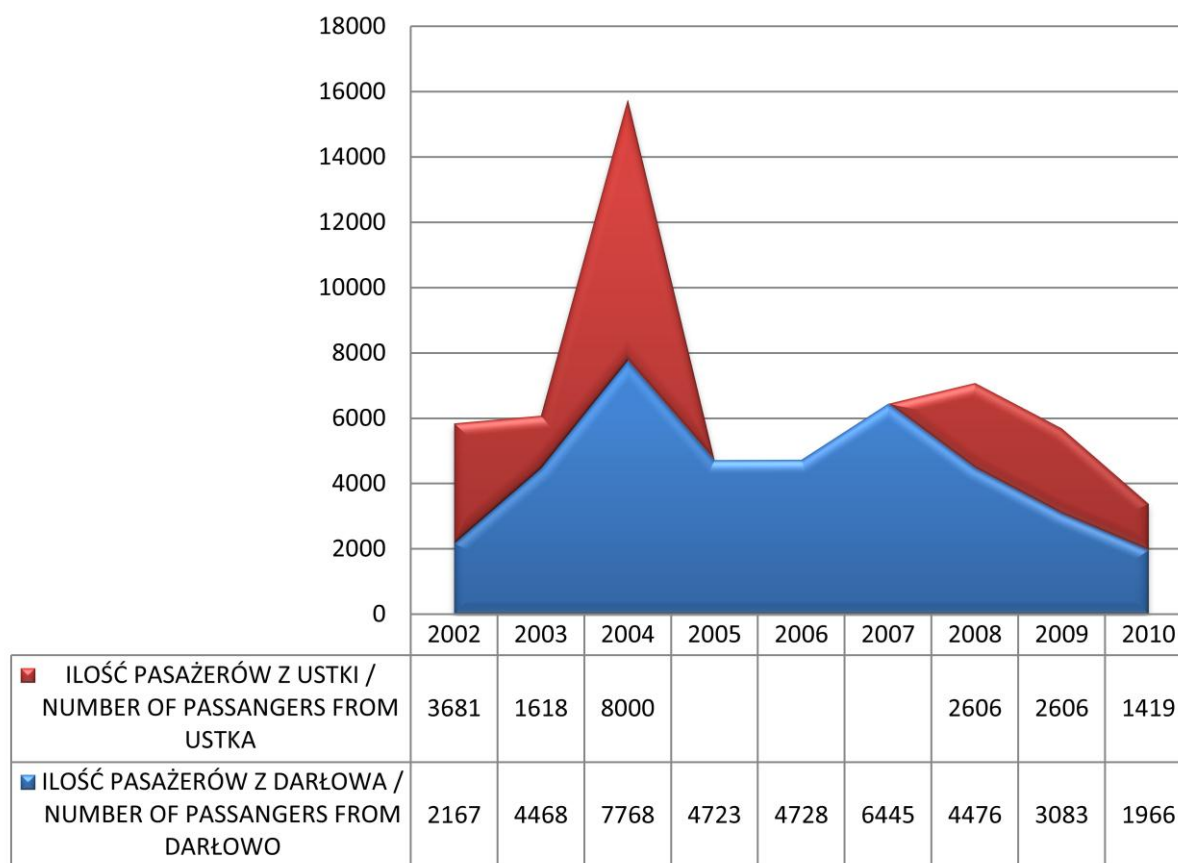
Bornholm

The current state in Bornholm is as follows:

You can travel from Poland to Bornholm by ferry going from Kołobrzeg to Naxø. The route is served by m/s Jantar, which can take 288 passengers. The ferry is not accessible to cars. The trip from Kołobrzeg to Naxø takes 4,5 hours. The cost of a return ticket (return on the same day) for an adult is 180

PLN.

PRZEWOZY PROMOWE Z USTKI I DARŁOWA NA BORNHOLM
NUMBER OF FERRY PASSENGERS FROM USTKA AND DARŁOWO TO BORNHOLM



The second option is a ferry from Świnoujście to Ystad, where one boards a ferry to Rønne. This is however an impractical solution due to the length of the trip (over 12 hours, this varies depending on the chosen option), the necessity of changing ferries in Ystad and high cost (car with five passengers costs 1105 PLN one way).

Tourists travelling by car have practically only one option – the ferry from Sassnitz to Rønne. This is a relatively cheap connection (return ticket - a car plus 4 passengers costs 1460 PLN) and quick. The trip lasts only 3,5 hours. The only inconvenience is the necessity of driving to Sassnitz. This connection enables tourists travelling from central Poland to reach Bornholm in about 12 hours.

Bornholm is visited each year by over 500 thousand tourists. It is difficult to assess the precise number of Poles visiting Bornholm. It

may be assumed that all of them travel by ferry. The ferry crossing g from Świnoujście is marginal, thus we can omit it. This incurs that Poles travel from Kołobrzeg and Sassnitz. The ferry m/s Jantar sailing from Kołobrzeg takes ab. 35 thousand passengers. Many of them return to Poland the same day. Tourists with cars sail from Sassnitz and a rough estimate is that they number about 7 thou. If we discard passengers on one-day trips we are left with 20-25 thou. Poles spending more than 1 day on the island. The nationalities of the tourists are as follows: Danish 55%, German 30%, the remaining are Swedish, Norwegian, Polish and others.

In the years 2002 to 2010 there existed a ferry connection between Ustka and Naxø and Darłowo and Naxø. The connection was run by Żegluga Gdańska and both routes were served by the same vessels (most recently Lady Assa). The diagram shows the number of passengers between these ports and Bornholm in subsequent years.

When the passenger/car connection from Świnoujście was in operation ab. 1900 cars were transported to Bornholm in season. It may be assumed that almost all of this traffic has been taken over by the port in Sassnitz.

The official accommodation base in Bornholm (i.e. for which accommodating people is the main business) can take in ab. 30 thou. tourists. However, there is a large unofficial accommodation base (not to be equated with “grey sector”). As a result, Bornholm in the peak season (July) can accommodate up to 140 thou. tourists. The season in Bornholm is in June, July and August. The island can offer accommodation to a larger number of tourists. The constriction lies in the transport possibilities of ferries. This was to be overcome by the purchase of a new, fast ferry, which due to technical reasons was not exploited in 2011, but should be sailing in the season of 2012. As the accommodation base of the island already exceeds the demand, its development is not planned.

Information obtained from Destination Bornholm ApS indicates that ab. 70% of the visitors return to the island. Due to this it is jokingly considered that the best promotion of the island is to show it at least once. The current promotional campaigns concentrate on the lengthening of the tourist season beyond the traditional holiday months. To this purpose numerous events are organised aimed at encouraging visits to the island in other seasons of the year – also in winter.

SURVEY – THE METHODOLOGY

For the purpose of this study a market survey was conducted in Bornholm and Darłowo.

The survey was to supply answers to several questions:

BORNHOLM

The Bornholm survey was to show the level of interest in spending several days in Poland, the preferred way of spending free time, expectations in regard to ferry crossings, the respondents' level of knowledge of Darłowo, the source of information on tourism. The survey was carried out on a sample group of N=500. The respondents were random passersby. The questionnaires were in five language versions: Danish, German, Swedish, Polish and English. They were handed to the respondents, who could choose their preferred language version and fill out the questionnaire. The survey was conducted in: the Tourist Information Centre in Rønne, the main square in Rønne and aboard the Sassnitz-Rønne ferry. The results of the survey are described in chapter BORNHOLM.

The structure of the sample in Bornholm:

AGE (in the subjective assessment of the interviewer)	Youths	23
	Young	182
	Middle-aged	170
	Mature	125
SEX	Woman	242
	Man	258
NATIONALITY	German (DE)	193
	Danish (DK)	144
	Swedish (SW)	80
	Polish (PL)	34
	Other (X)	49

The questionnaire used in Bornholm

B	ANK	DT	NR	ANSWERS					Please read the questions and choose the answers by marking the relevant blank. If none of the answers are correct go on to the next question.
1	Which country are you from?			PL	DK	S	D	Other	Please choose one answer
2	Where do you obtain information on tourism and spending free time?			Web	Press	TV	Other		You can choose more than one answer
3	What is your favourite way of spending free time/vacation?			Many people-having fun	nature - quiet	Sightseeing – historical monuments, museums etc.	sport – physical activity	other	You can choose more than one answer
4	At which time of the year do you seek the above attractions (in our climatic zone)?			spring	summer	autumn	winter		You can choose more than one answer
5	How much time during your vacation/holidays do you spend engaging in the activities mentioned in point 3?			Up to 1 day	Up to 3 days	Up to 1 week	Up to 2 weeks	Over 2 weeks	Please choose one answer
6	How much time are you prepared to devote to travelling to the place offering the attractions of your interest?			Up to 1 hour	Up to 2 hours	Up to 4 hours	Up to 6 hours	Over 6 hours	Please choose one answer
7	Would you travel by ferry to reach your destination?			YES	NO				Please choose one answer
8	If yes, what would you take with you?			car	bicycle	tent			You can choose more than one answer

9a	With what do you associate Darłowo?	Name of Baltic fish	Name of Polish basketball player	City in Poland	Polish vegetarian dish	Brand of Chinese cars	Please choose one answer
10	Have you considered spending your free time in Poland?	YES	NO	I've been in Poland			Please choose YES or NO and, if applicable, "I've been in Poland"
11	If you have been in Poland, did you travel by ferry? Where to?	Świnoujście	Kołobrzeg	Ustka	Darłowo	Gdynia	You may choose many answers. Mark with a circle the worst port, the others with a cross.
11a	If you travelled by ferry to Poland, how would you describe the quality of the route?	Very bad	bad	Fairly good	good	Very good	Please choose one answer – if you've been in several ports, describe the worst one.
11b	To what do your objections refer?	ship	Service on the ship	terminal	Service at the terminal	Time of journey	You can choose more than one answer-if you've been in several ports, describe the worst one.

DARŁOWO

The survey conducted in Darłowo was to determine the potential level of the willingness to visit Bornholm, the preferred ways of spending free time, expectations in regard to ferry crossings, the respondents' level of knowledge of Bornholm, the source of information on tourism. The survey was carried out on a sample group of N=1500. The respondents were random passersby encountered in Darłowo on the streets, in cafes etc. The questionnaires were in five language versions: Danish, German, Swedish, Polish and English. The survey was carried out by interviewers. The results of the survey are described in chapter DARŁOWO.

The structure of the sample in Darłowo:

AGE (in the subjective assessment of the interviewer)	Youths	64
	Young	586
	Middle-aged	492
	Mature	358
SEX	Woman	744
	Man	794

The questionnaire used in Darłowo

D	ANK	DT	NR	ANSWERS					Please read the questions and choose the answers by marking the relevant blank. If none of the answers are correct go on to the next question.
1	Which country are you from?			PL	DK	S	D	Other	Please choose one answer
2	With what do you associate Bornholm?			Baltic fish	Swedish general	Sea current	Island on the Baltic sea	German dish	You can choose more than one answer
3	Where do you obtain information on tourism and spending free time?			web	press	TV	other		You can choose more than one answer
4	What is your favourite way of spending free time/vacation?			Many people-having fun	nature - quiet	Sightseeing – historical monuments, museums etc.	sport – physical activity	other	You can choose more than one answer
5	At which time of the year do you seek the above attractions (in our climatic zone)?			spring	summer	autumn	winter		You can choose more than one answer
6	How long are you staying in Darłowo?			1 day	Up to 3 days	Up to 1 week	longer		Please choose one answer
7	Would you travel by ferry to reach the place offering the attractions of your interest mentioned in point 4?			YES	NO				Please choose one answer
7a	If yes, what would you take with you?			car	bicycle	tent			You can choose more than one answer
7b	How long would you stay?			1 day	Up to 3 days	Up to 1 week	longer		Please choose one answer



8	Which of Bornholm's tourist attractions are you aware of?	bicycle trails	beaches	monuments	night clubs	other	I don't know any	You can choose more than one answer
9	Have you been to Bornholm? If so, how did you travel there?	ferry	airplane	Private transport	I haven't been there			You can choose more than one answer
9a	If you travelled by ferry to Bornholm, where did you board?	Świnoujście	Kołobrzeg	Ustka	Darłowo	Gdynia		You may choose many answers. Mark with a circle the worst port, the others with a cross.
9b	If you travelled by ferry, how would you describe the quality of the route?	Very bad	bad	Fairly good	good	Very good		Please choose one answer – if you've been in several ports, describe the worst one.
9c	To what do your objections refer?	ship	Service on the ship	terminal	Service at the terminal	Time of journey		You can choose more than one answer-if you've been in several ports, describe the worst one.
10	Would you consider the ferry trip to Bornholm as a tourist attraction in itself?	YES	NO	I don't know				Please choose one answer
10a	While in Bornholm, would you use local organised transport?	YES	NO	I don't know				Please choose one answer

BORNHOLM

HOW TO READ THE DIAGRAMS:

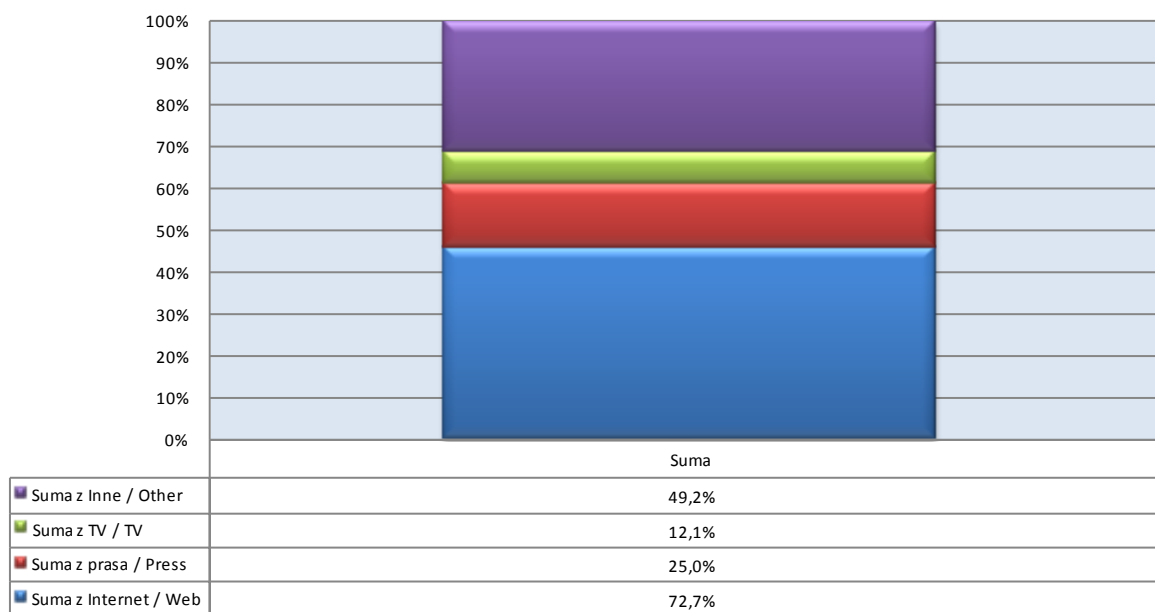
All the diagrams presented in this report are bar charts of two types: the first one shows the answers given by all of the respondents, the second one shows answers depending on nationality. Nationalities are marked as follows: DK – Denmark, DE – Germany, SW – Sweden, PL – Poland, X – other. Single-bar charts – for all nationalities, are easy to interpret. The various colours depict the percentage of the particular answers among all the answers given. Under the diagram there is a table showing the percentage of respondents who chose the relevant answer. In multi-bar charts the situation is slightly more complicated. The colours of the bars depict percentage of the particular answer related to all answers given in the relevant nationality group. The table below shows the percentage related to the whole sample.

Data in the table may not sum up to 100% in cases when multiple answers were possible.

The survey was conducted on a sample of N=500 during street interviews with randomly chosen respondents.

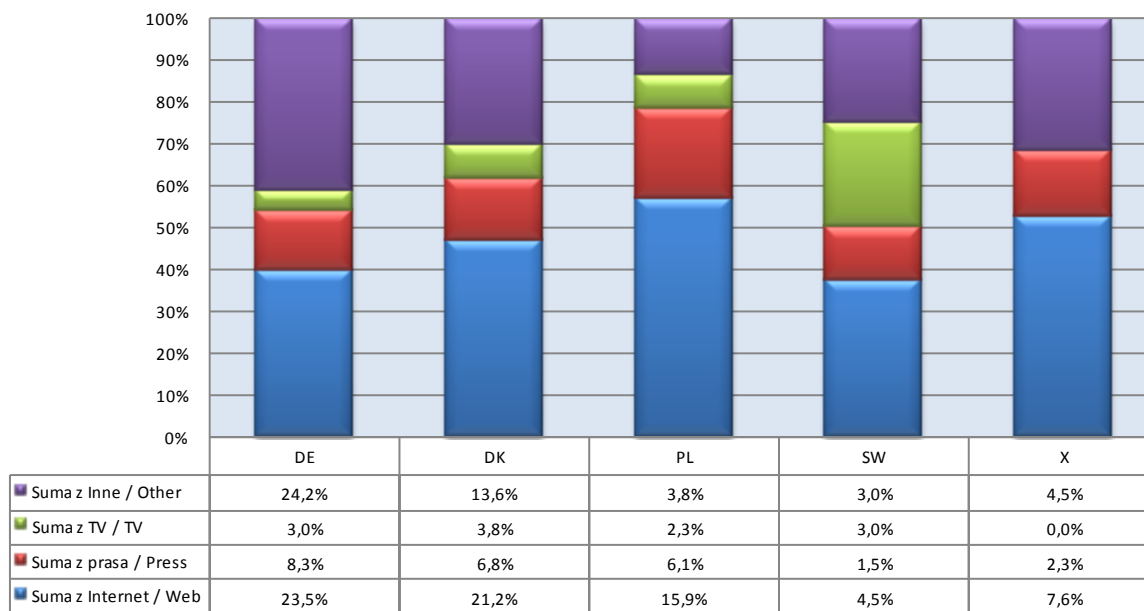


ŹRÓDŁA INFORMACJI DOT. TURYSTYKI SOURCE OF INFORMATION ON TOURISM



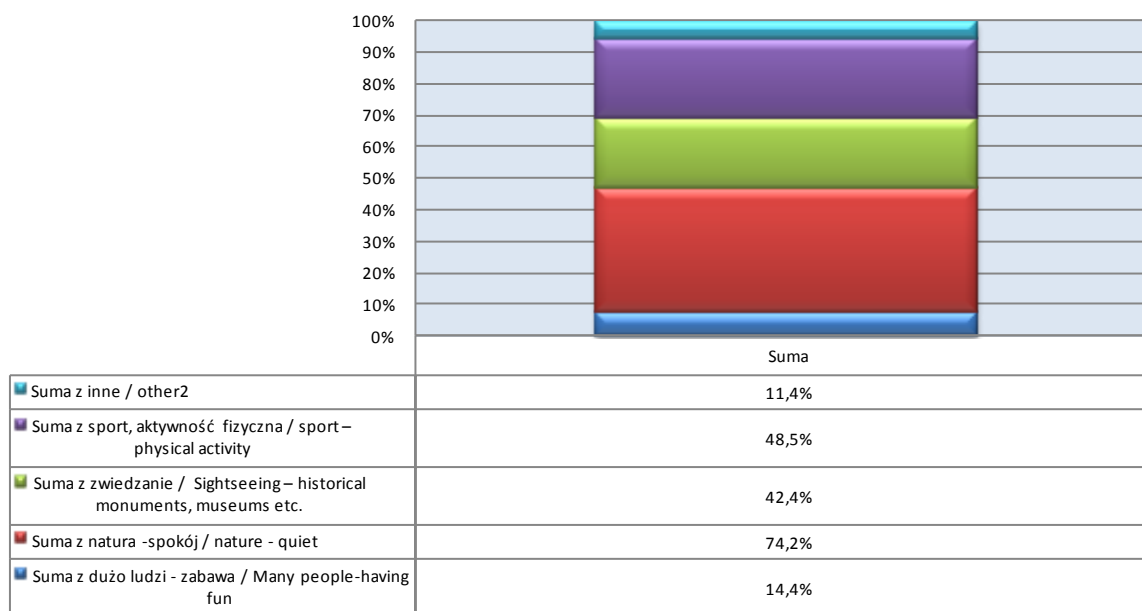
The above diagram shows that the Web is the main source of information on tourism. The second source is “other”, however it cannot be precisely defined.

ŹRÓDŁA INFORMACJI DOT. TURYSTYKI SOURCE OF INFORMATION ON TOURISM



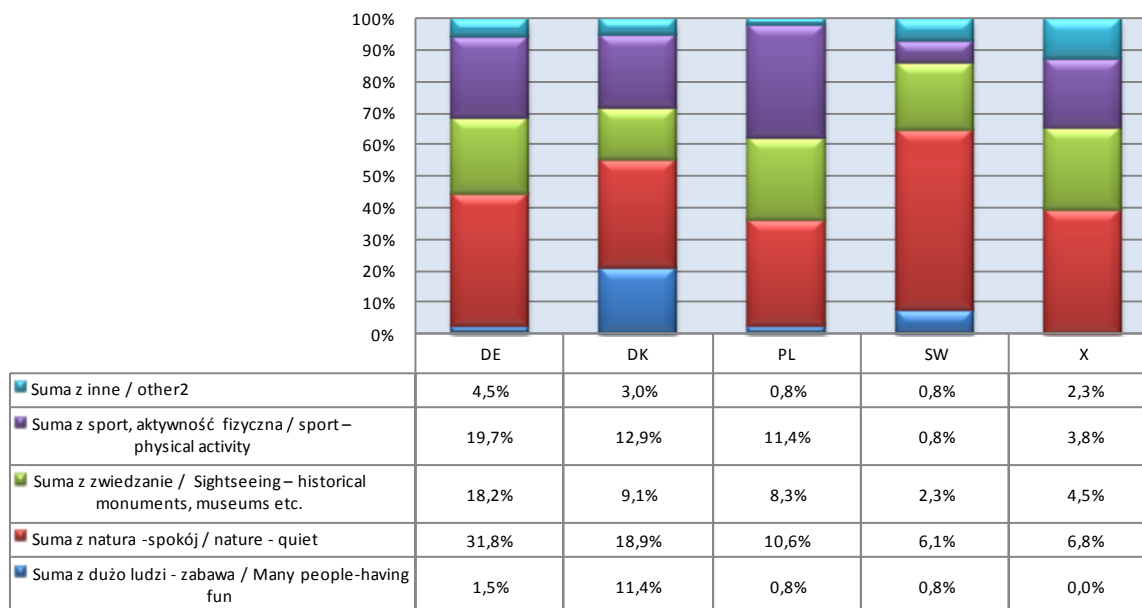
This diagram confirms the information contained in the previous one – the main source of information is the Web , especially in Poland. The relatively high position of the press as a source of information is characteristic of Poland. In Sweden television is an important source. In Germany and Sweden the role of the web is surprisingly small.

ULUBIONE FORMY SPĘDZANIA CZASU FAVOURITE WAYS OF SPENDING TIME



The above diagram shows that the most favourite way of spending free time is contact with nature in peaceful surroundings. In second place is sport and physical activity. Such a result is caused by the sample choice. The respondents were people spending their free time on Bornholm, which main advantage is the possibility of spending free time in peaceful surroundings, travelling by bicycle.

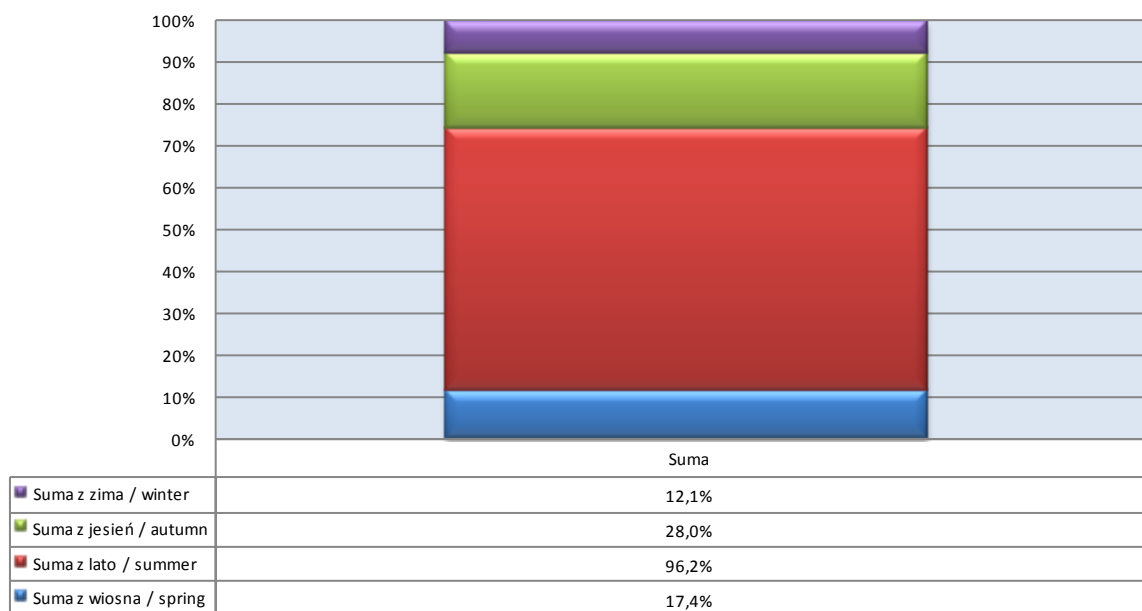
ULUBIONE FORMY SPĘDZANIA CZASU FAVOURITE WAYS OF SPENDING TIME



The diagram shows the declared favourite ways of spending free time in a break-down by nationality. It is a confirmation of the previous chart. The relatively large number of answers pointing to the wish to spend time in large groups of people found in the Danish group results from the structure of the Danish sample. The Danish sample group consisted of the relatively largest amount of young people, for whom the presence of others and having fun in the company of other young people occupies a high position on the list of favourite activities.

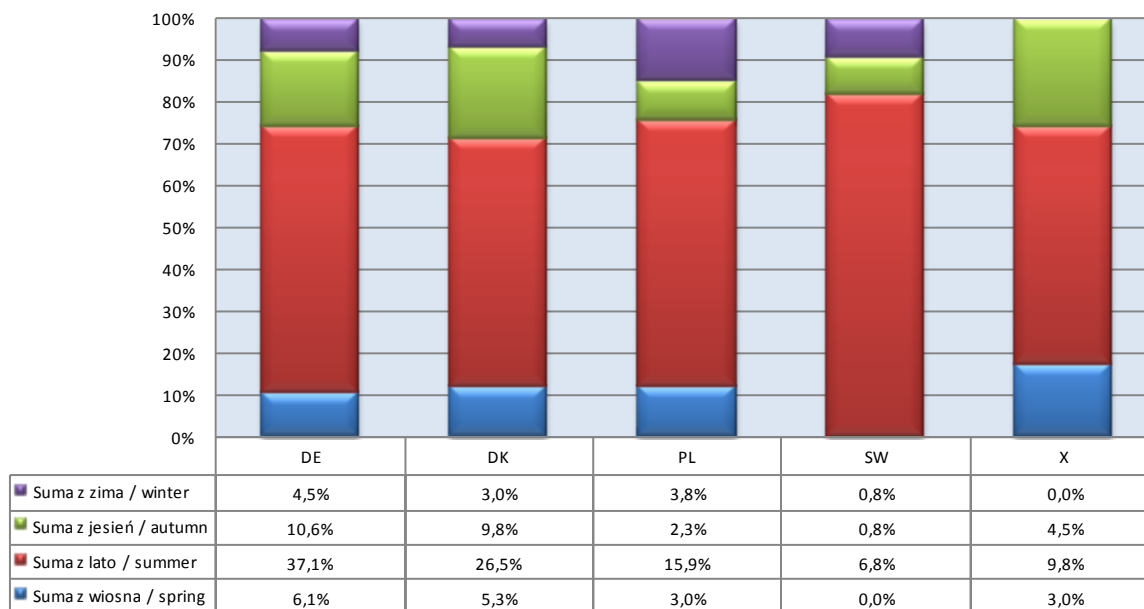


PREFEROWANA PORA WAKACJI PREFERRED HOLIDAY SEASON



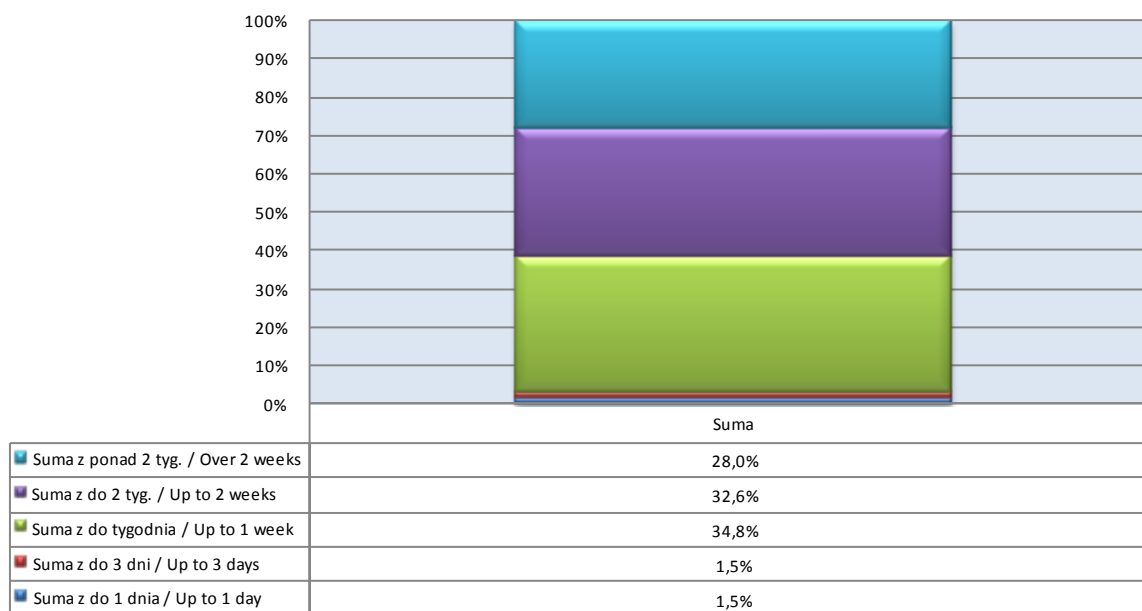
The chart shows in which seasons of the year holiday plans are realised. Summer is of course the first choice. It must be pointed out that the question referred to holidays in our climatic region, so trips to exotic countries were not applicable.

PREFEROWANA PORA WAKACJI PREFERRED HOLIDAY SEASON



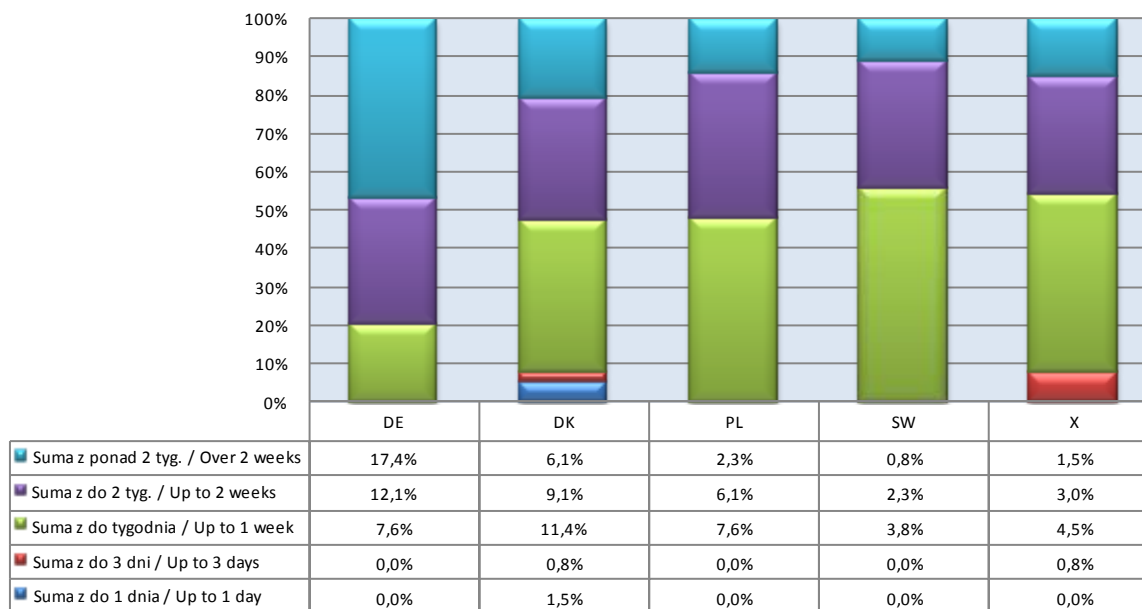
The above chart shows that summer is undisputedly the most favoured holiday time in all the nationality groups.

DEKLAROWANY CZAS WYJAZDU DECLARED DURATION OF STAY



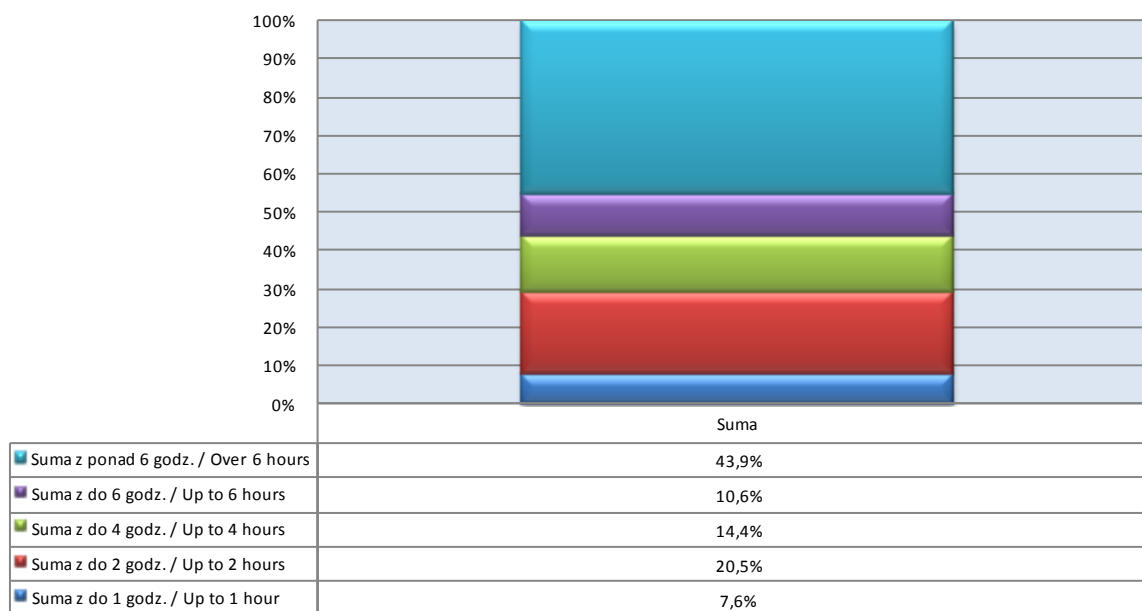
The diagram shows that short trips are not popular. According to the respondents holidays should last at least a week in an interesting location. Two-week stays are equally popular, and what is interesting, the same applies to even longer holidays.

DEKLAROWANY CZAS WYJAZDU DECLARED DURATION OF STAY



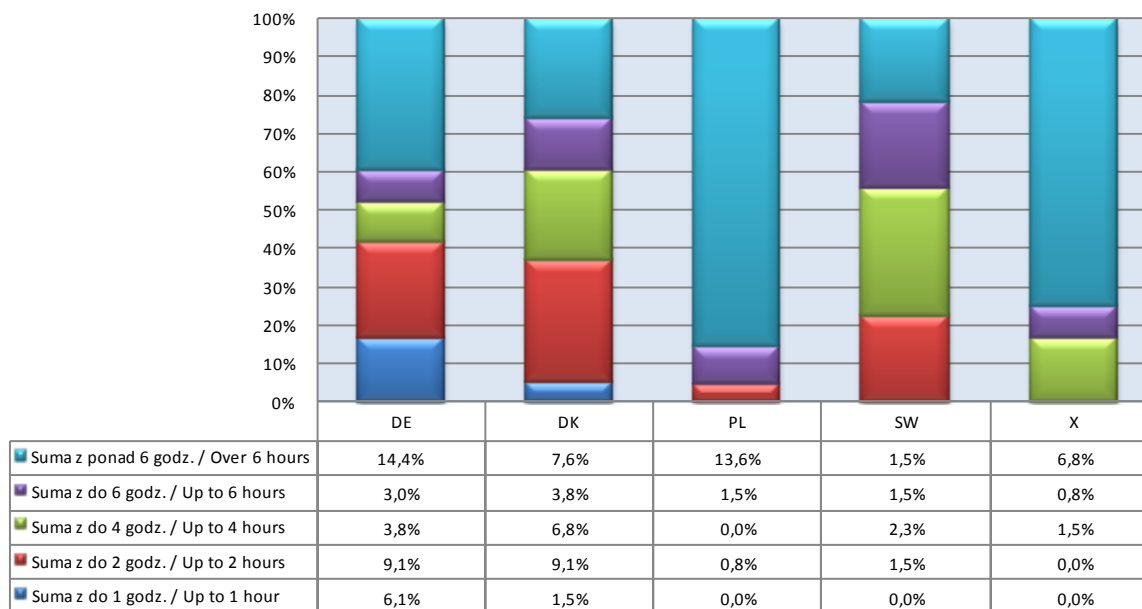
The bar chart shows that Germans are most prone to long stays – even longer than two weeks. In the remaining national groups stays of up to one week oscillate around the 50% mark.

CZAS DOJAZDU TRAVELLING TIME



The above diagram shows that almost half of the respondents is willing to undertake long journeys in order to reach the destination of their holiday. Even a trip exceeding 6 hours is not an obstacle.

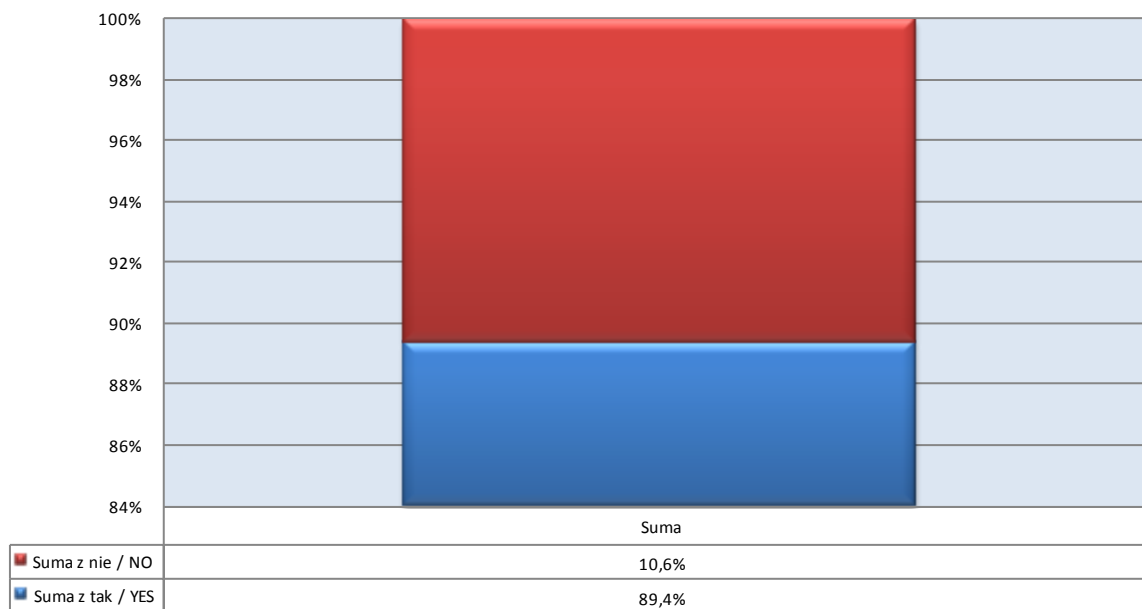
CZAS DOJAZDU TRAVELLING TIME



The diagram shows that Poles are the most immune to the discomforts associated with travelling. Swedes and, to some extent, Danes are the least willing to undertake long trips.



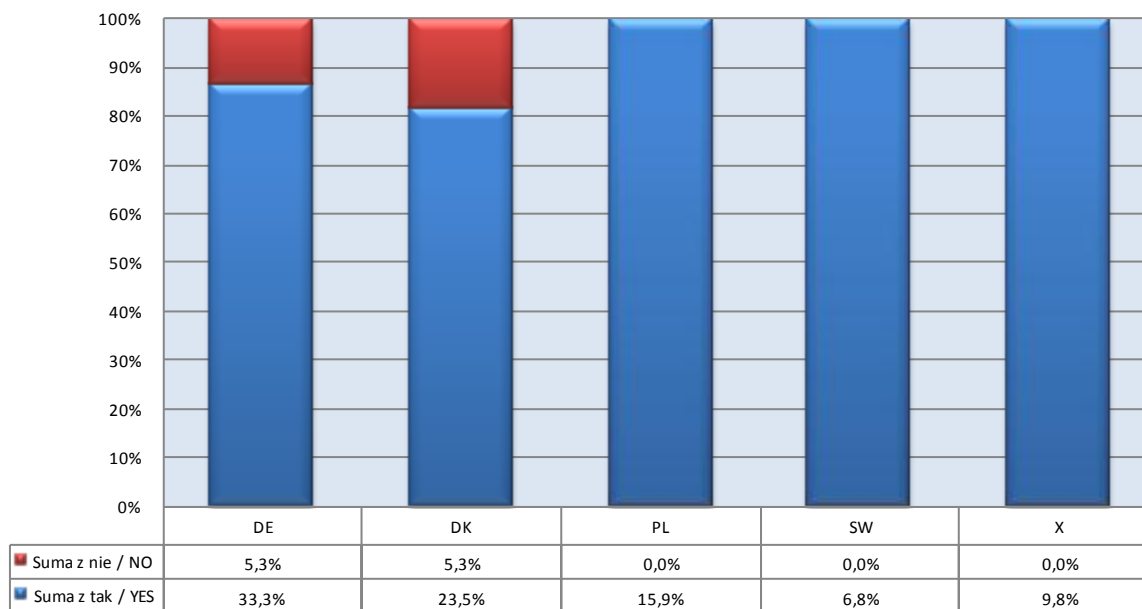
CHĘĆ SKORZYSTANIA Z PROMU WILLINGNESS TO TAKE A FERRY



The vast majority of the respondents is willing to use a ferry during their journey (Note: the vertical scale is shortened and does not start at 0%)



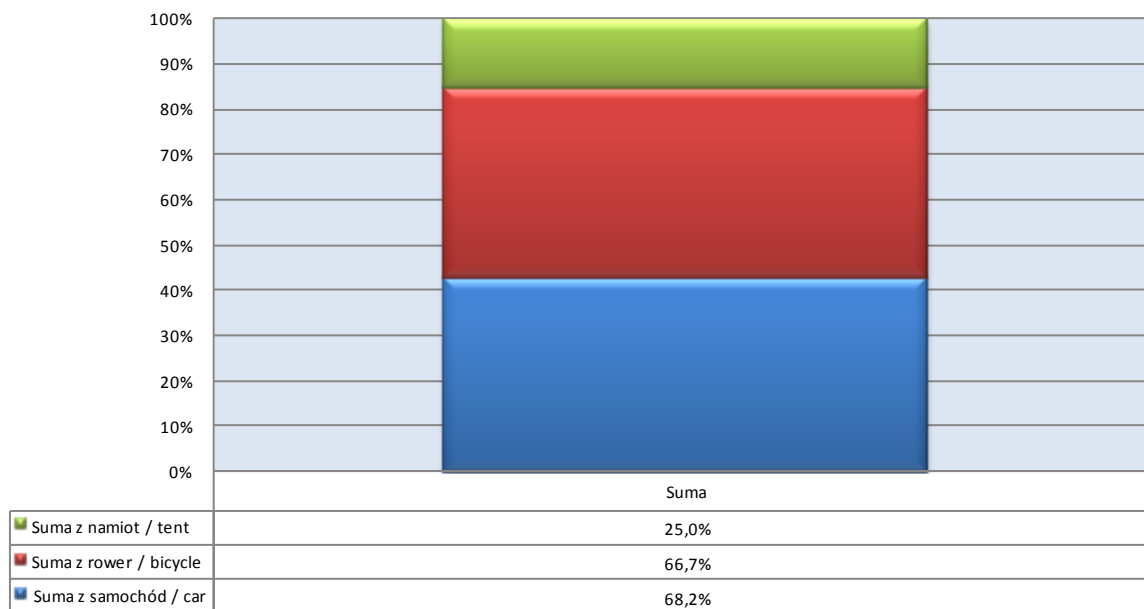
CHĘĆ SKORZYSTANIA Z PROMU WILLINGNESS TO TAKE A FERRY



The diagram show that the only nationalities displaying an aversion to ferry trips are Germans and Danes. However, such negative feelings are shared by only a small number of people.



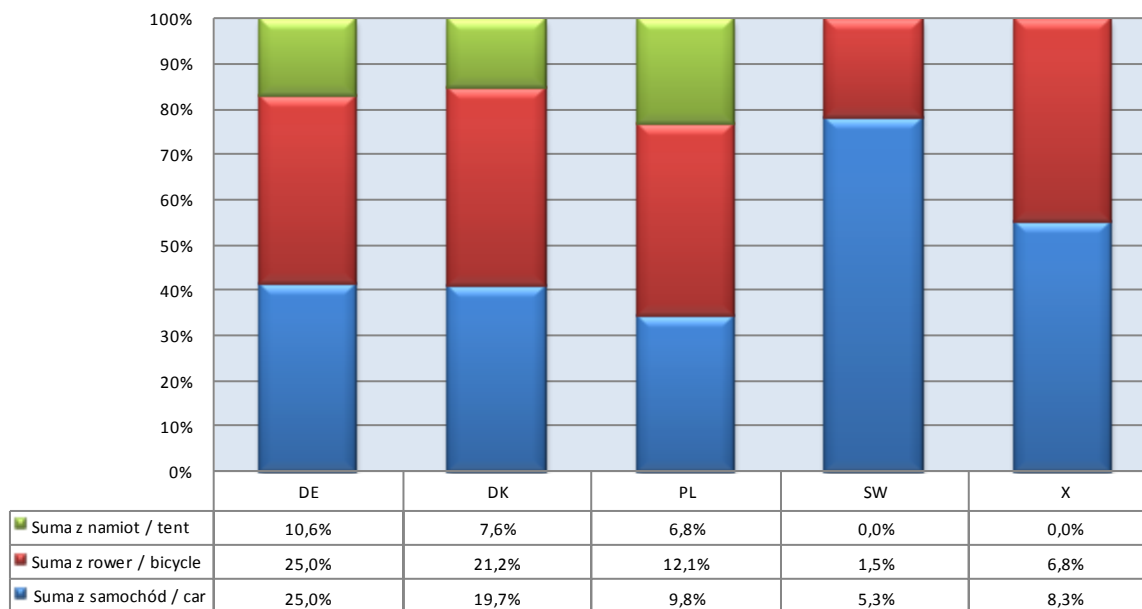
CO ZABIORĘ Z SOBĄ WHAT I WILL TAKE WITH ME



Most of the respondents declare the will to take with them cars and bicycles. Tents are not very popular.



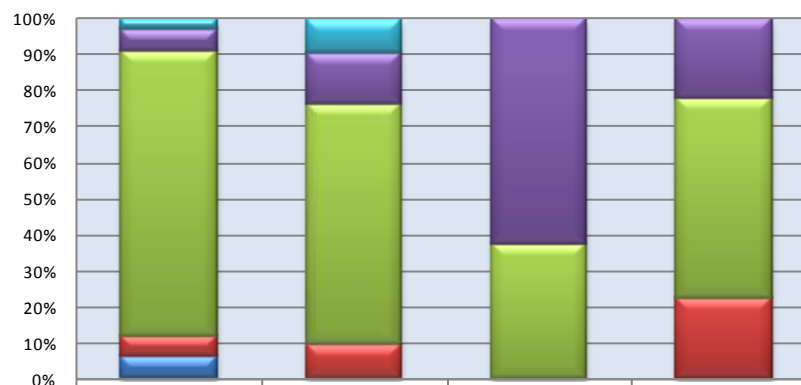
CO ZABIORĘ Z SOBĄ WHAT I WILL TAKE WITH ME



Swedes seem to be absolute admirers of cars. They do not intend to take tents with them. Tents appear to be mostly liked by Poles. The answers given by Germans and Danes hardly differ.



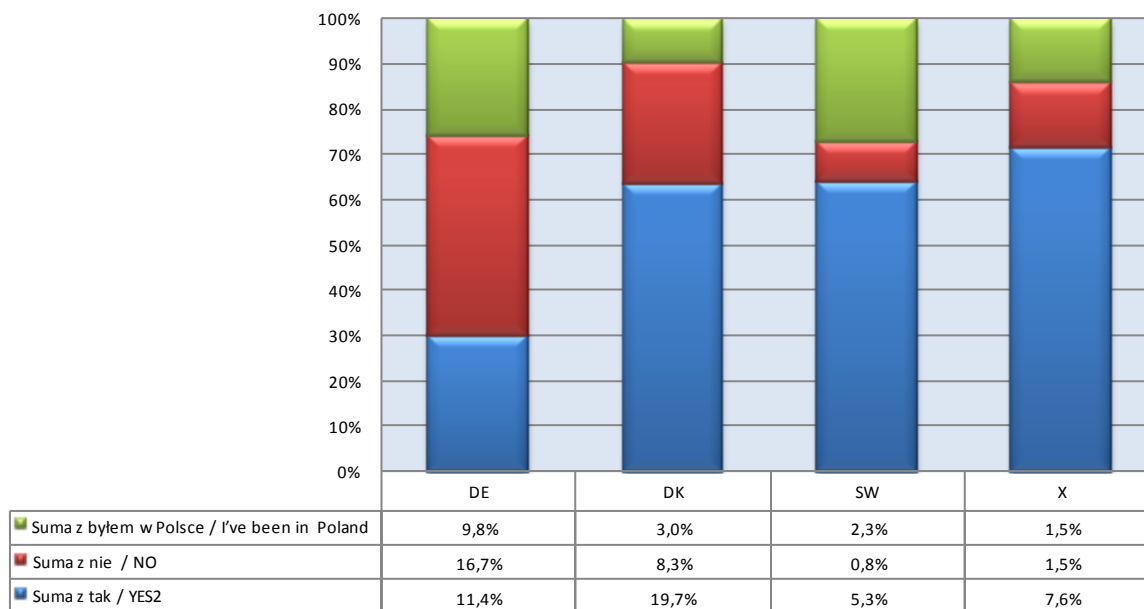
CO TO JEST DARŁOWO? WHAT IS DARŁOWO?



	DE	DK	SW	X
Suma z chiński samochód / Brand of Chinese cars2	0,8%	1,5%	0,0%	0,0%
Suma z polska potrawa / Polish vegetarian dish2	1,5%	2,3%	3,8%	1,5%
Suma z miasto Darłowo / City in Poland	19,7%	10,6%	2,3%	3,8%
Suma z polski koszykarz / Name of Polish basketball player2	1,5%	1,5%	0,0%	1,5%
Suma z ryba bałtycka / Name of Baltic fish	1,5%	0,0%	0,0%	0,0%

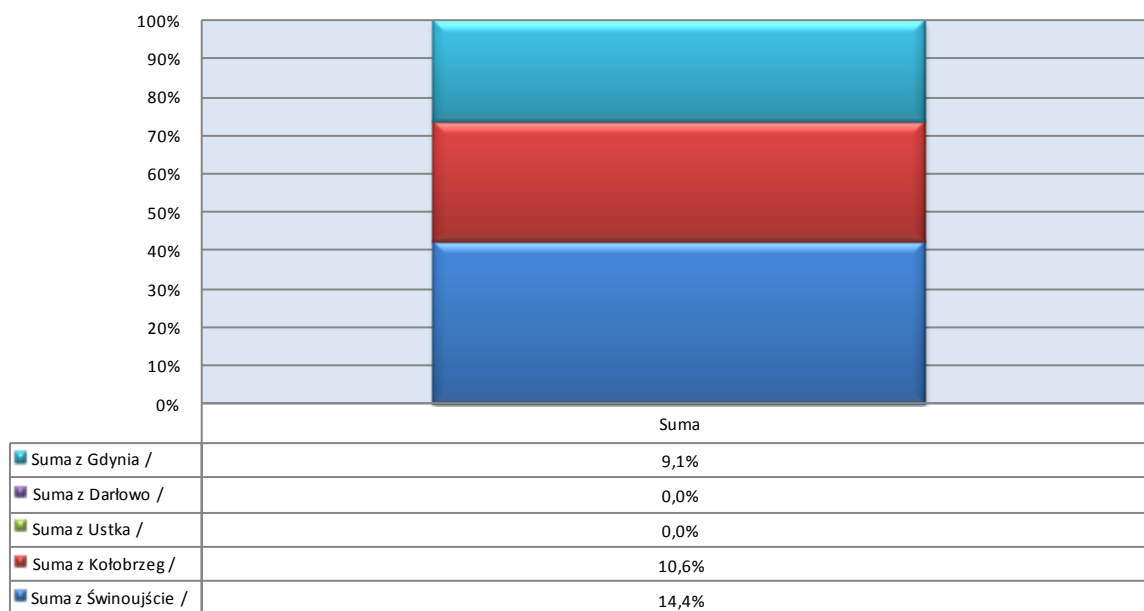
The diagram does not show answers given by Poles. Although the correct answers are predominant, which may suggest a good knowledge of Darłowo among the respondents, they result from the elimination of the least likely options – the very subject matter of the survey inspired the respondents to think „geographically”.

CZY SPĘDZIŁBYŚ WAKACJE W POLSCE? WOULD YOU GO FOR HOLIDAYS TO POLAND?



The diagram does not show answers given by Poles. The willingness of German respondents to spend holidays in Poland is characteristically low.

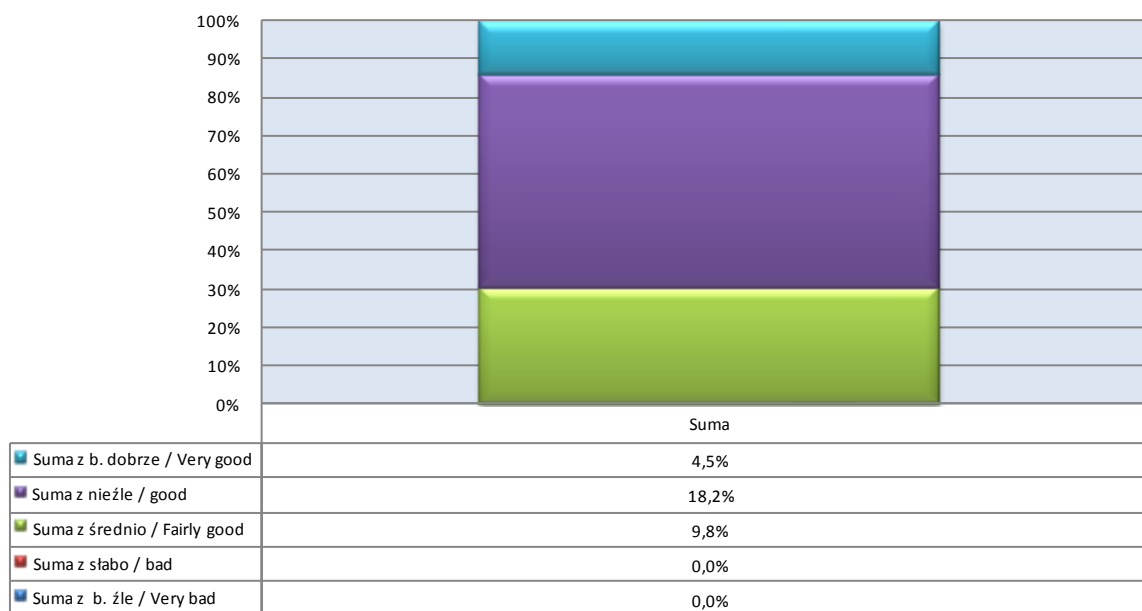
CZY PODRÓŻOWAŁEŚ PROMEM W POLSCE? DID YOU TRAVEL BY FERRY IN POLAND?



The diagram shows that a large part of the respondents travelled by ferry from Polish ports. Unfortunately, none of them boarded in Ustka or Darłowo.



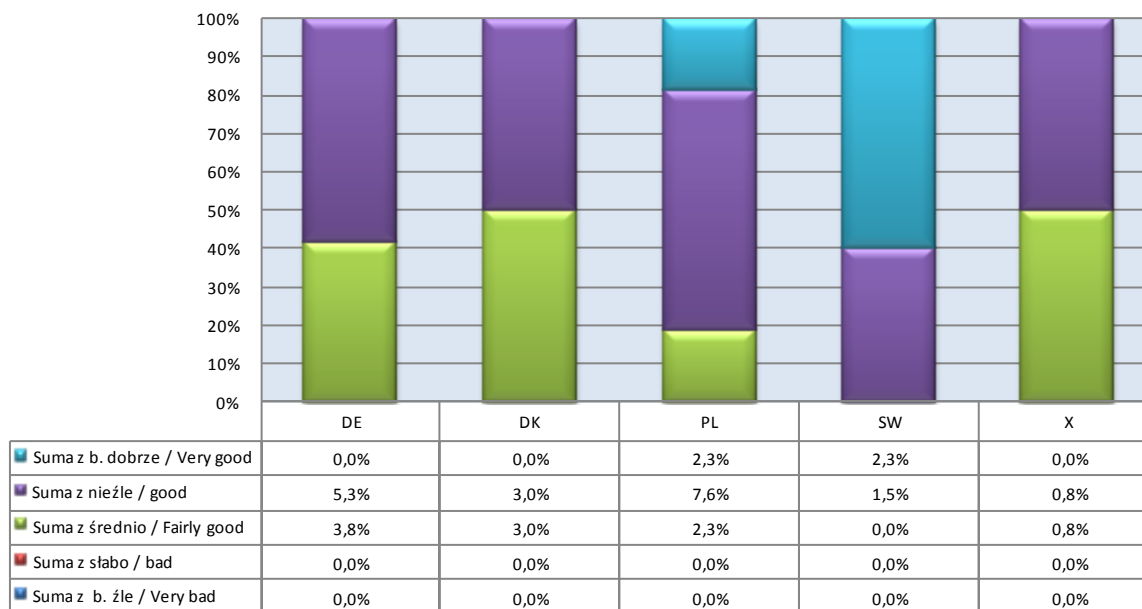
JAK OCENIASZ JAKOŚĆ POŁĄCZENIA PROMOWEGO?
HOW DO YOU ASSESS THE QUALITY OF THE FERRY ROUTE?



The diagram is a continuation from the previous page. It shows that there are no negative remarks on ferries sailing from Poland.

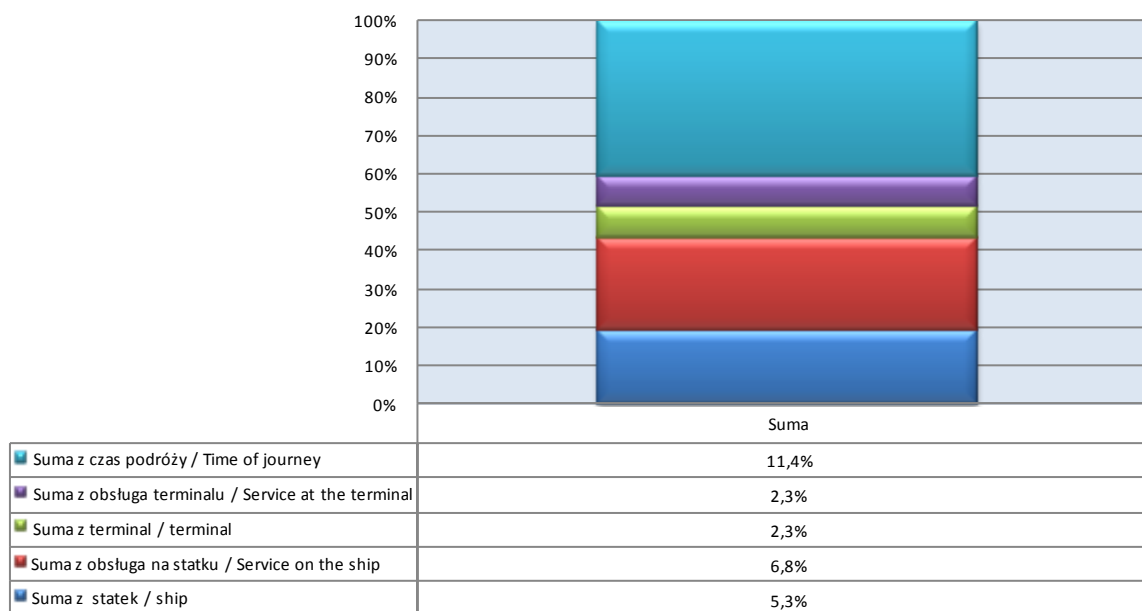


JAK OCENIASZ JAKOŚĆ POŁĄCZENIA PROMOWEGO? HOW DO YOU ASSESS THE QUALITY OF THE FERRY ROUTE?



The diagram shows answers given to the same question as in the previous chart, but in a break-down by nationality. Swedes appear to have a very good opinion of Polish ferries. This most probably results from the fact that they have travelled by large, one can even say luxurious vessels sailing between Poland and Sweden.

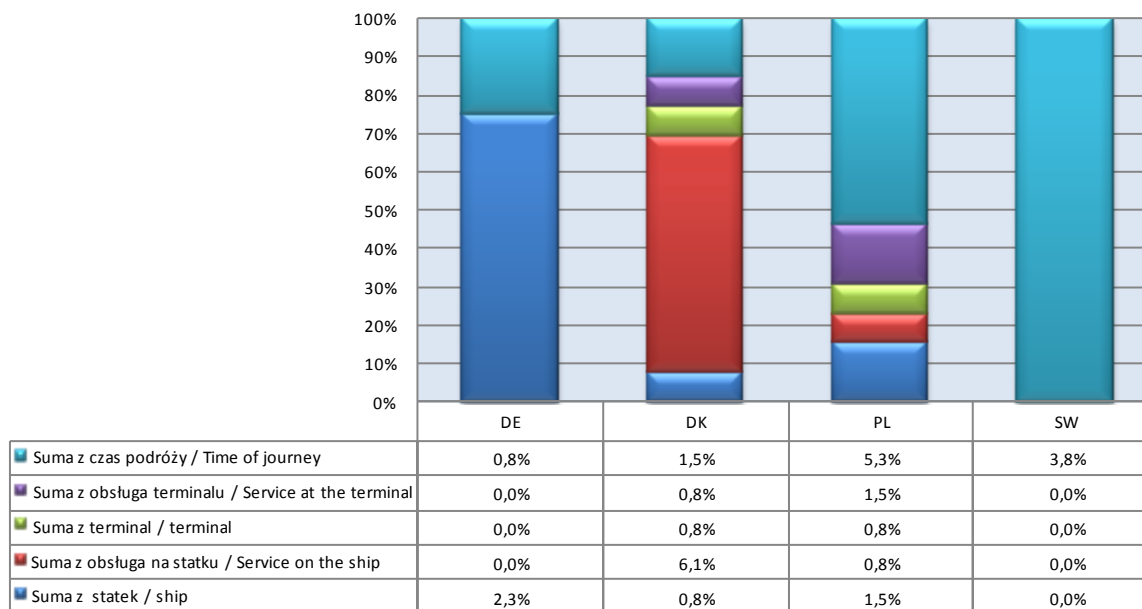
CZEGO DOTYCZĄ ZASTRZEŻENIA NATURE OF THE OBJECTIONS



This diagram refers to the questions described in the two previous charts. It can be seen that the majority of objections are related to the long duration of the ferry trip. The implication is clear: the duration of the trip should be reduced to the maximum.

The quality of service on the ship also draws negative opinions.

CZEGO DOTYCZĄ ZASTRZEŻENIA NATURE OF THE OBJECTIONS



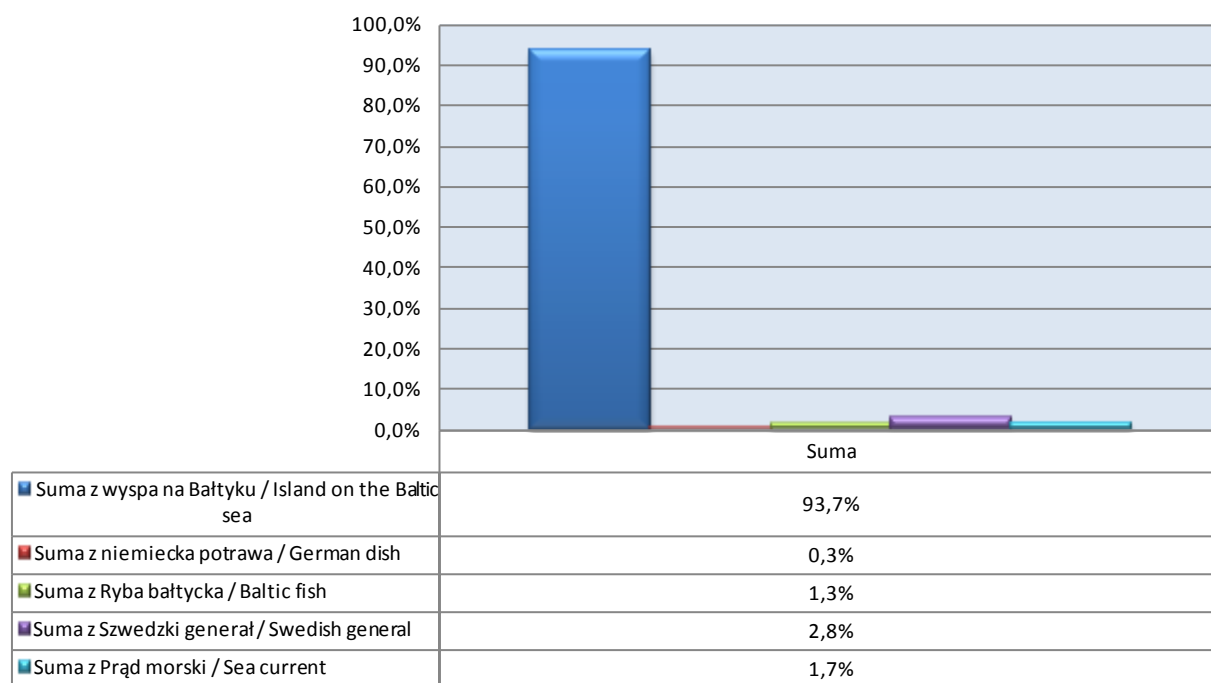
The diagram shows answers given to the same question as in the previous chart, but in a break-down by nationality. Very interesting disparities in the opinions if various nationalities can be seen. Germans complain mostly of the vessel (it most probably offers low comfort of the journey), Danes complain of the quality of the service aboard the vessel (it would be interesting to review to what these objections refer), Swedes and Poles complain of the duration of the journey.

When analysing the above chart please note that these opinions are held only by several percent of the entire sample group.

DARŁOWO

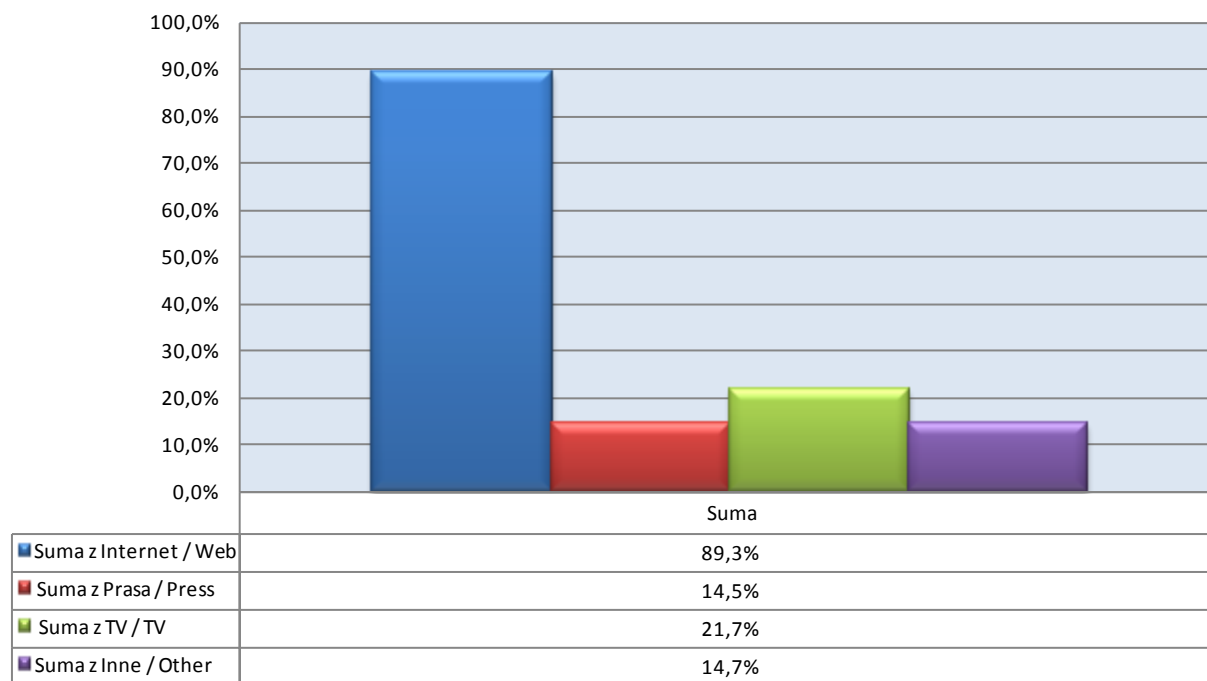
The survey was conducted on a sample of N=1500 during street interviews with randomly chosen respondents.

Co to jest Bornholm? What is Bornholm?



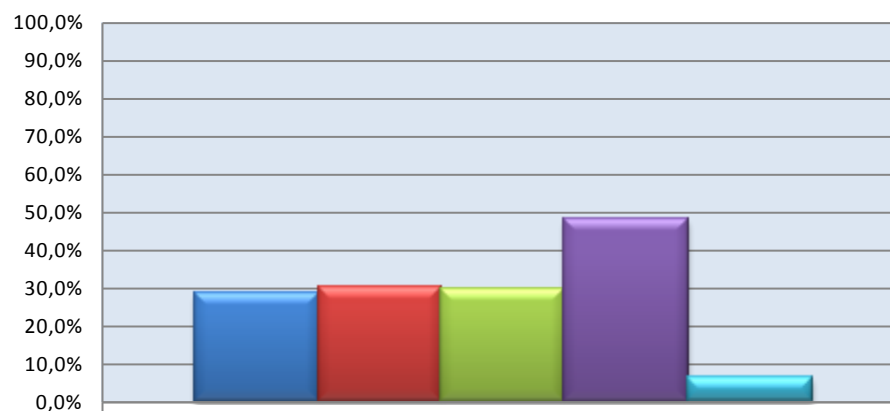
The diagram shows that nearly all the respondents in Darłowo knew the answer to this question.

Źródła informacji o turystyce Source of information on tourism



The diagram show that the majority of the respondents from Darłowo gains information on tourism from the web.

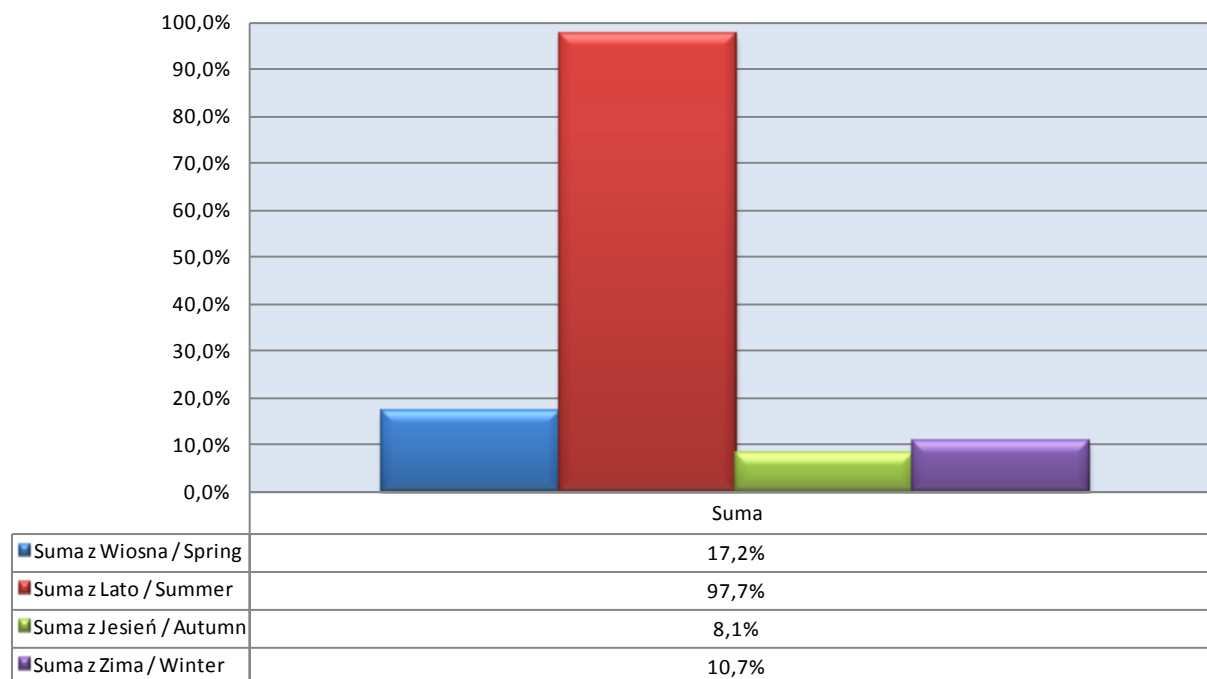
Ulubione formy spędzania czasu Favourite ways of spending time



■ Suma z Dużo ludzi - zabawa / Many people having fun	28,5%
■ Suma z Natura - spokój / Nature - quiet	29,9%
■ Suma z Zwiedzanie / Sightseeing	29,7%
■ Suma z Sport - aktywność fizyczna / Sport - physical activity	48,1%
■ Suma z inne / Other2	6,3%

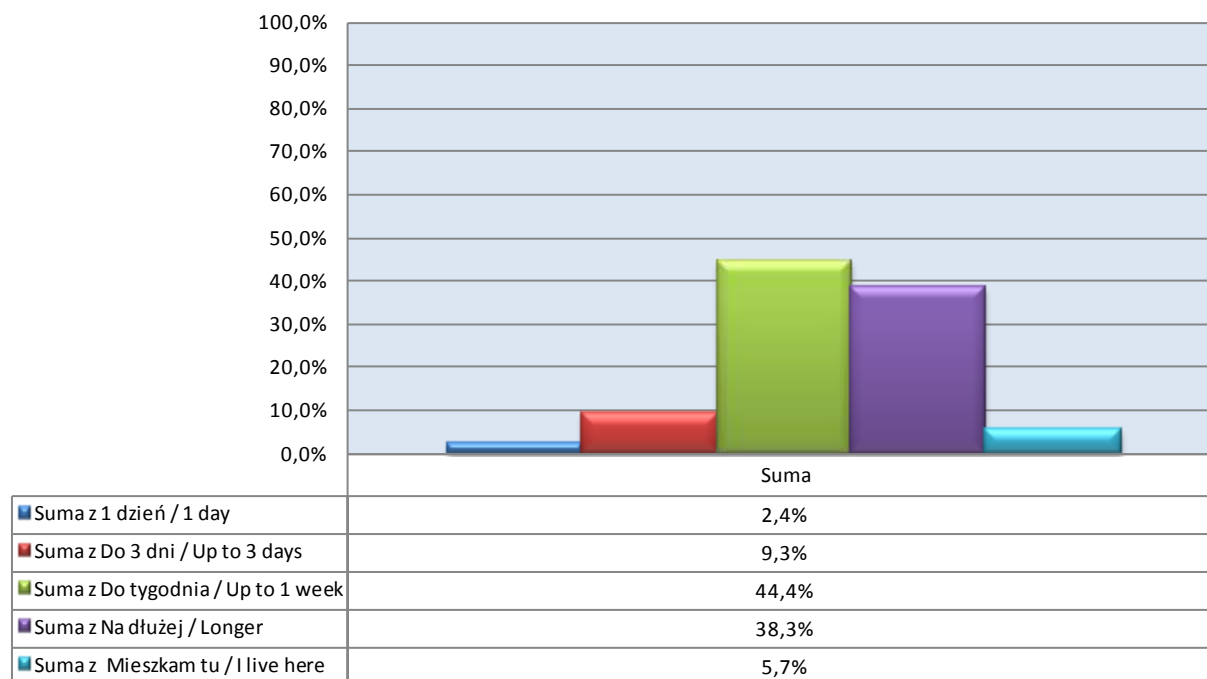
The respondents from Darłowo prefer active forms of spending free time. The remaining suggestions received nearly the same amount of voices each, but decidedly less than sport.

Preferowana pora wakacji Preferred holiday season



Summer is the preferred time for holidays.

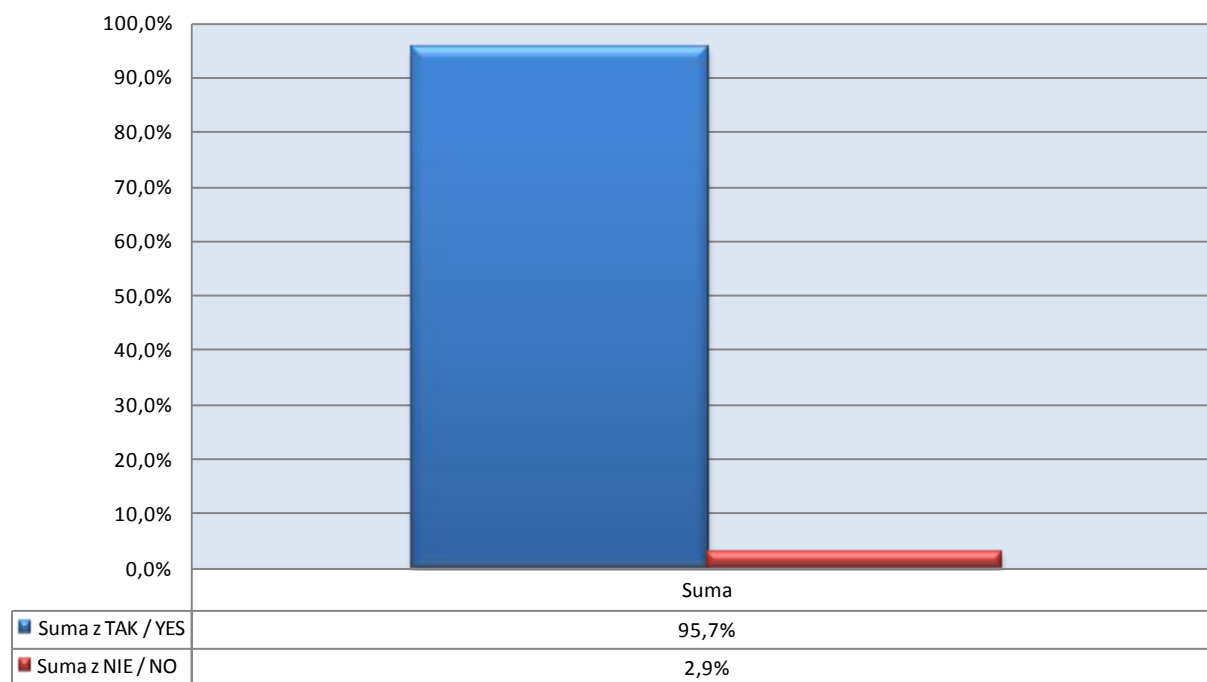
Deklarowany czas pobytu w Darłowie Declared duration of stay in Darłowo



The majority of the respondents declares that they have come to Darłowo for a stay of up to one week and longer.



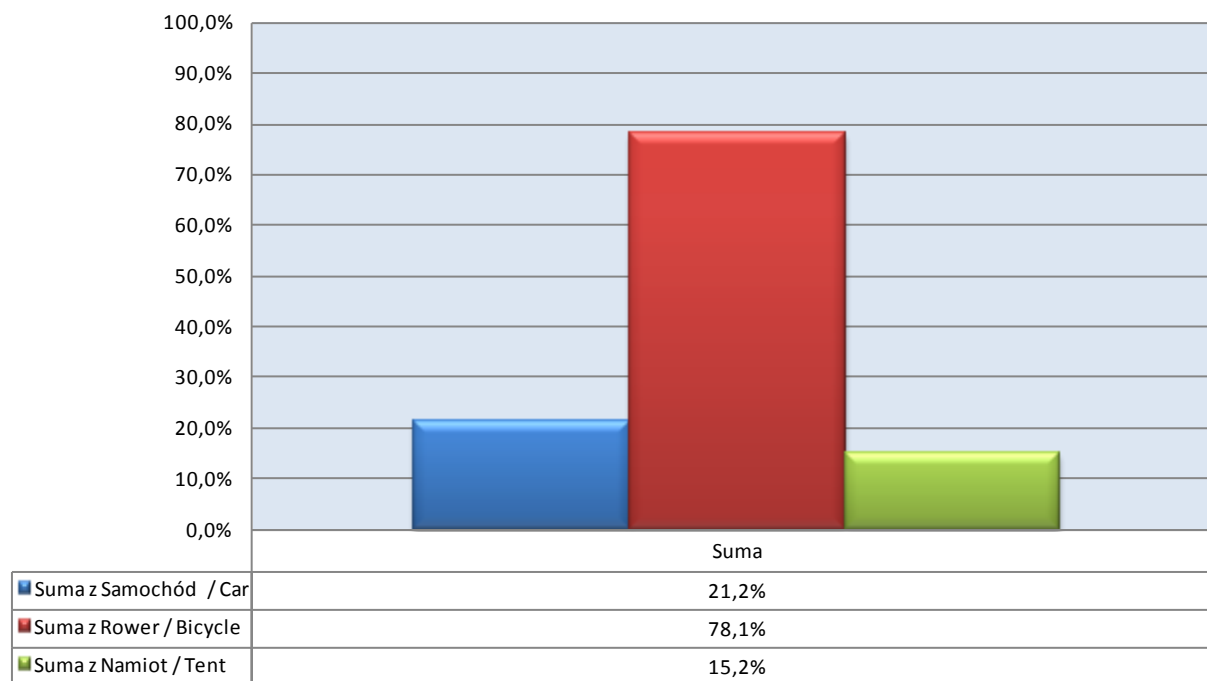
Chęć skorzystania z promu Willingness to take a ferry



The respondents in Darłowo would take a ferry to reach a place where they could realise their passions.

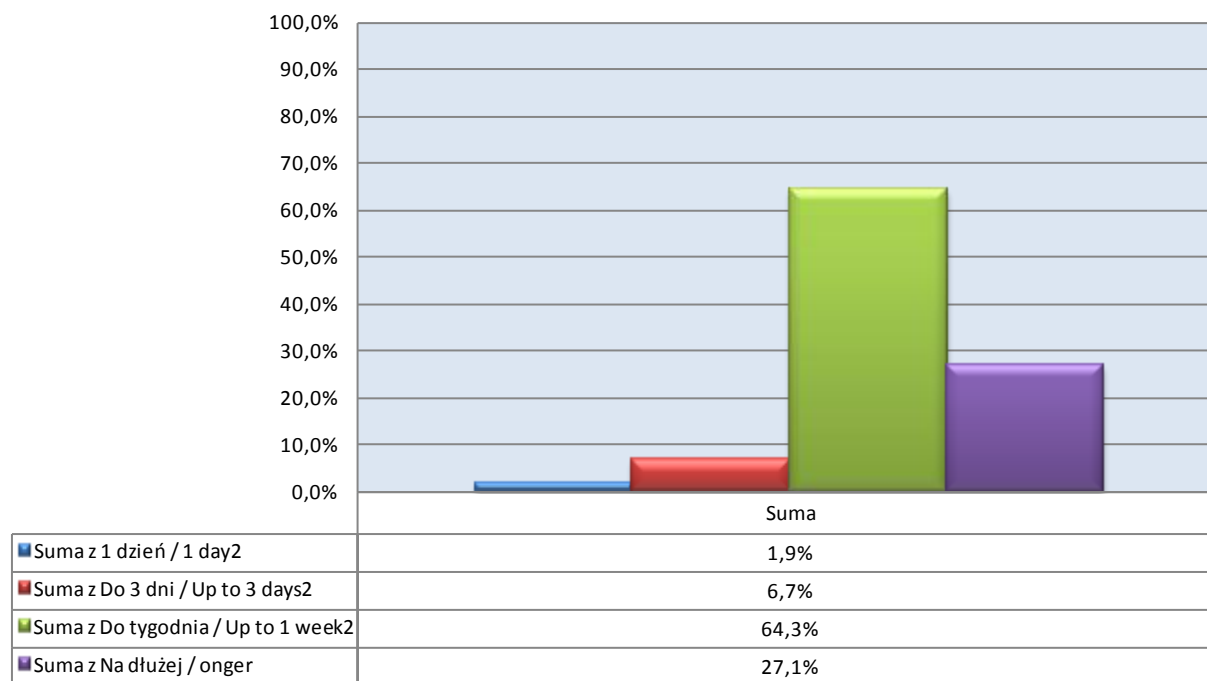


Co zabiorę z sobą What I will take with me



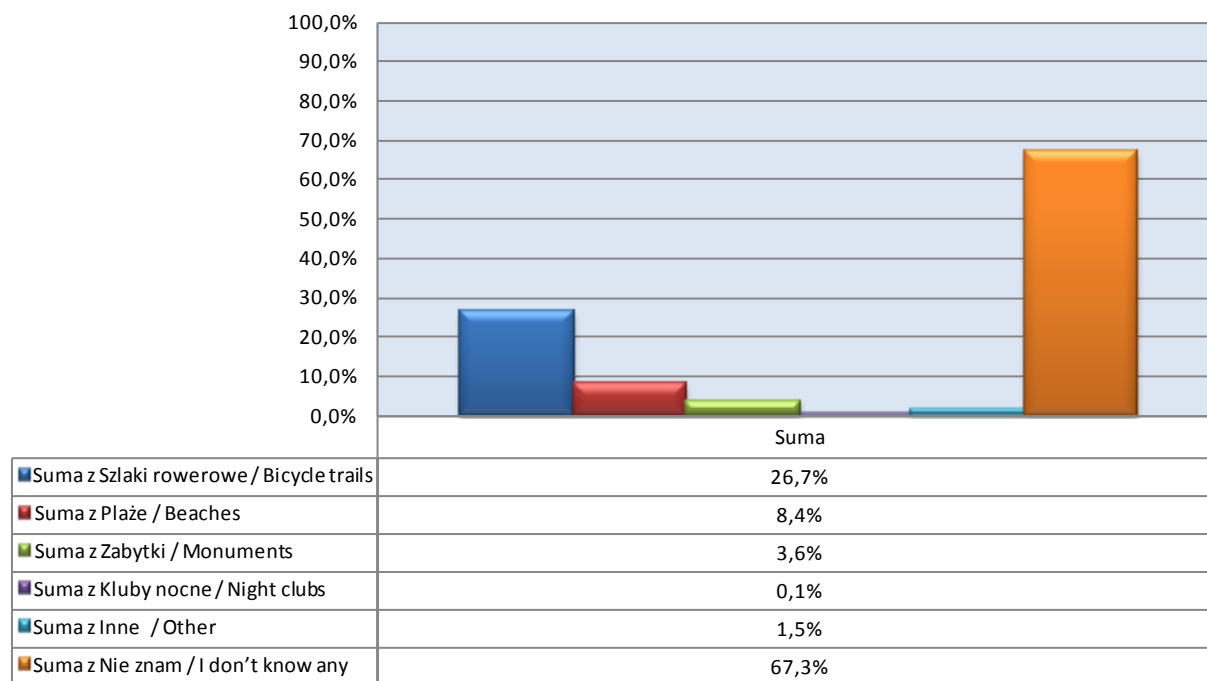
The chart confirms the Darłowo respondents' preference for sport. The majority of them would take a bicycle with them when going on holiday.

Na jak długo pojadę How long I will stay



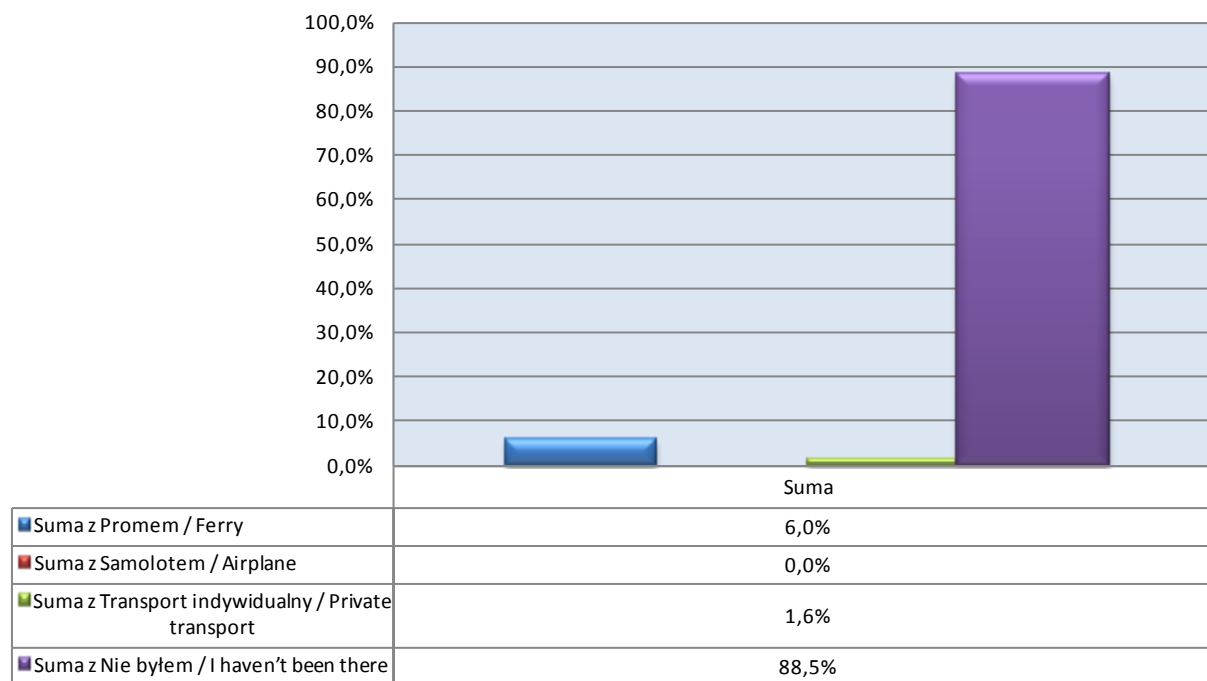
The majority of the respondents in Darłowo would spend up to one week on holiday.

Jakie znasz atrakcje Bornholmu Bornholm's attractions known



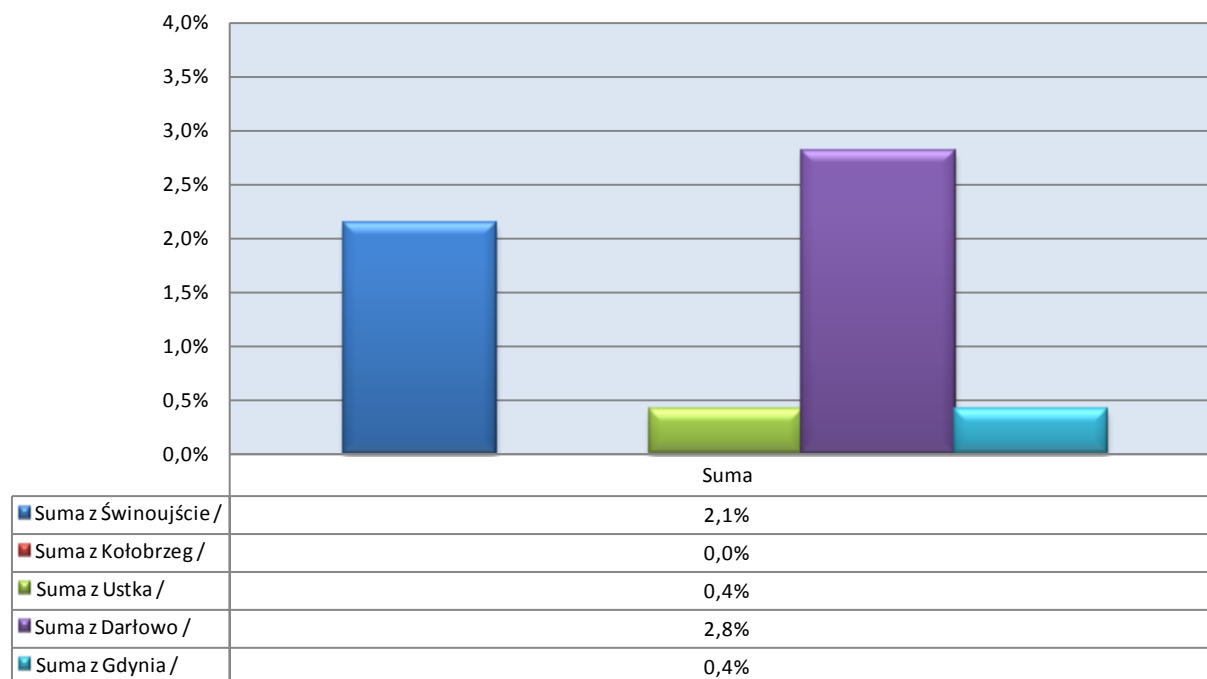
The chart shows that a relatively large number of respondents in Darłowo has knowledge of Bornholm's bicycle trails and beaches. The vast majority knows nothing of the island.

Jak dotarłeś na Bornholm How you got to Bornholm



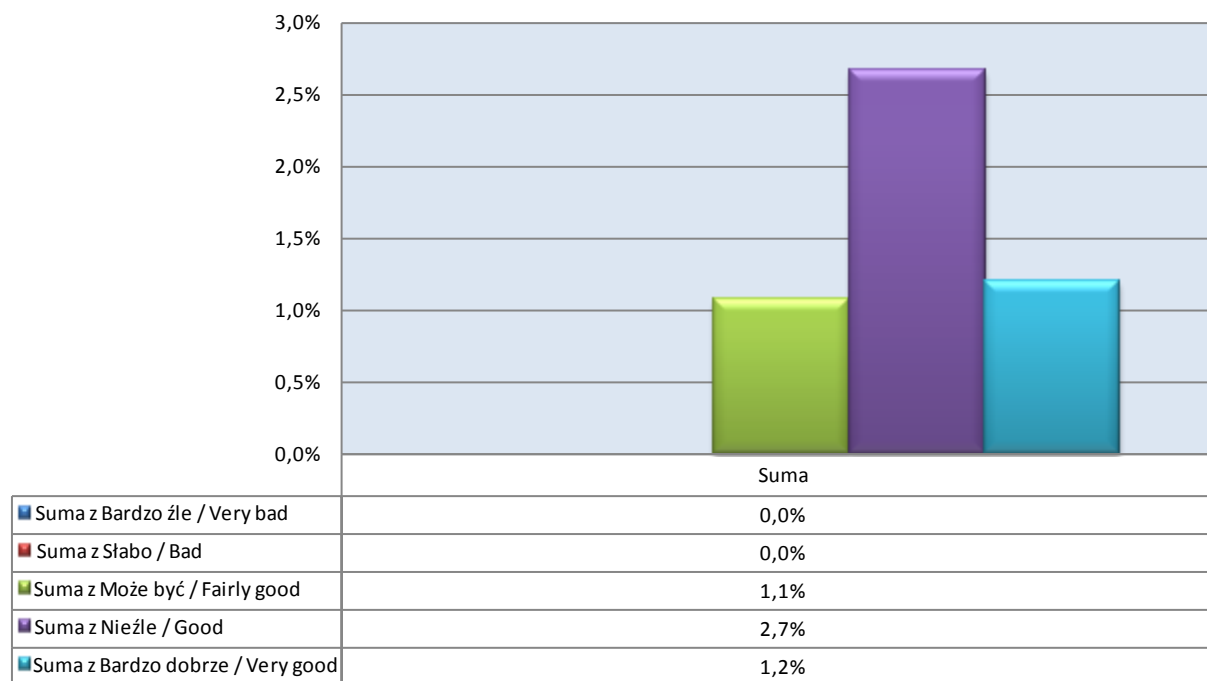
The question was to assess how many people have already been to Bornholm. Most of the respondents in Darłowo have not been to Bornholm. Those who have travelled by ferry.

Skąd płynąłeś promem? Where did you take a ferry from



The next three charts show answers to questions referring to the quality of the ferry connections to Bornholm. Only people who already went by ferry to Bornholm answered the questions. The chart shows that the majority of the respondents in Darłowo boarded the ferry in Darłowo or Świnoujście.

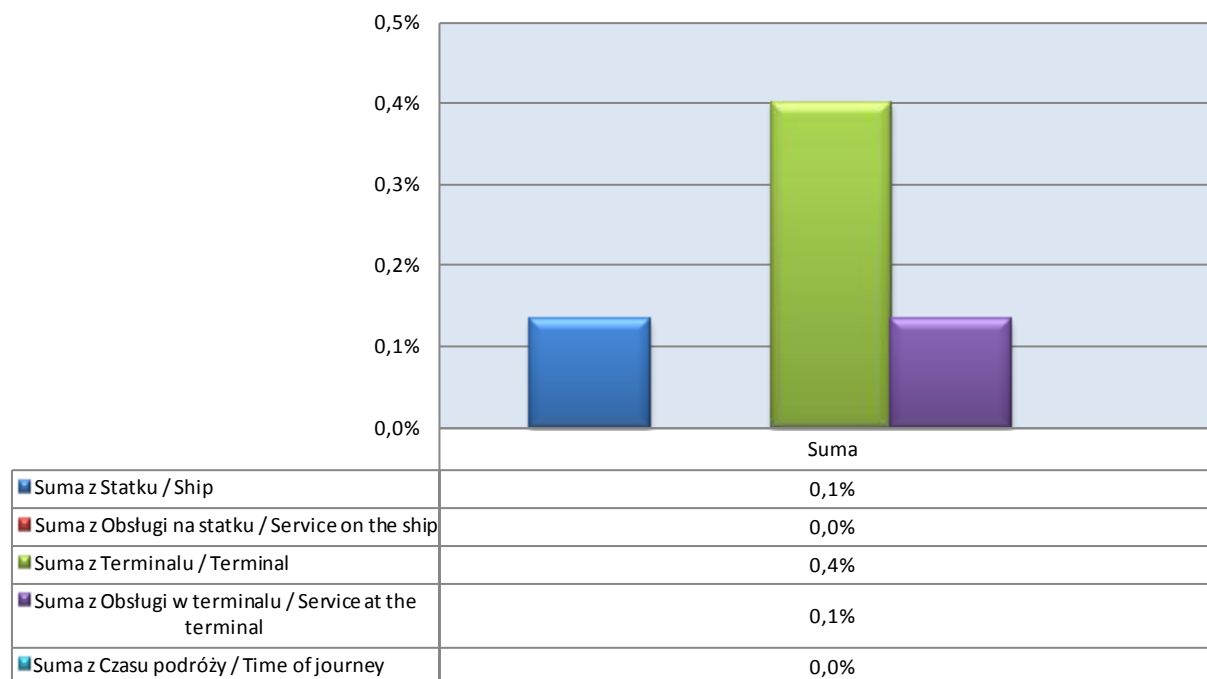
Jak ocenasz jakość połączenia promowego? How do you assess the quality of the ferry route?



The vast majority of the respondents claimed that the quality of the ferry crossing was good.

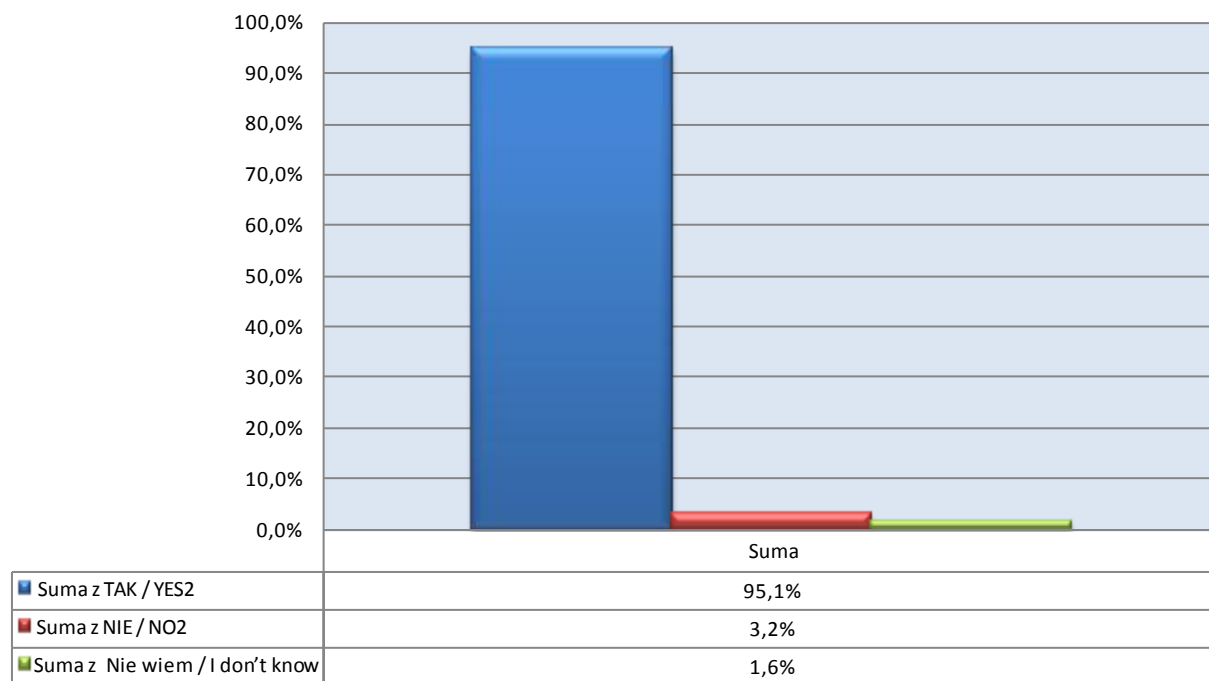


Do czego miałeś zastrzeżenia? What is the nature of the objections?



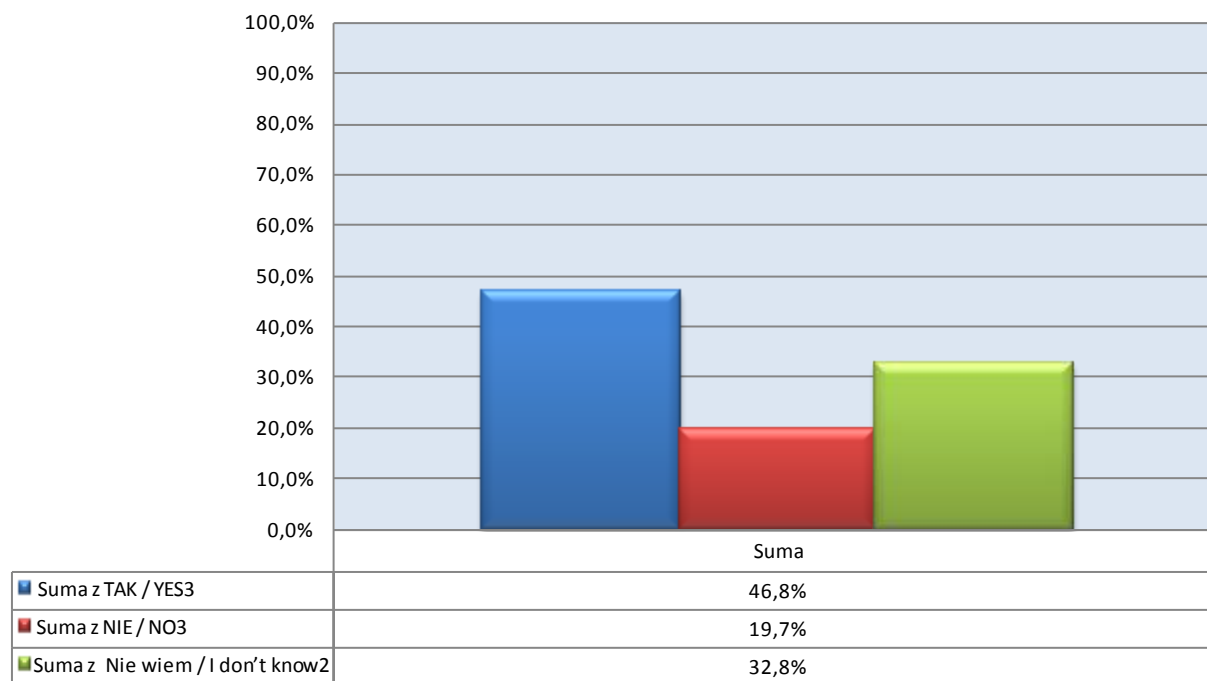
The state of the terminal raised the largest number of complaints.

Czy rejs na Bornholm byłby atrakcją samą w sobie? Would a ferry voyage to Bornholm be an attraction as such?



The vast majority of the respondents in Darłowo would consider a ferry trip to Bornholm as a tourist attraction in itself.

Czy na Bornholmie korzystalibyś z transportu publicznego? Would you use public transport in Bornholm?



The chart shows that the respondents in Darłowo do not have a marked opinion on public transport on Bornholm.



SCENARIOS FOR DARŁOWO

The scenario for the development of a ferry connection between Bornholm and Darłowo is based on the following assumptions:

1. As the starting point we have adopted the number of transports realised by the ferry from Darłowo in 2002 to 2010. It is hard to notice a pattern in the number of passengers then transported. Thus we adopt the starting point arbitrarily with the consideration of the realities of past years. We do not divide passengers by nationality.
2. Our forecast does not refer to any particular ferry, but only to the foreseen demand for ferry crossings.

We present two scenarios:

1. Optimistic scenario:
 - a. Promotional campaigns result in a 15% increase in the number of passengers per year for subsequent 10 years, until the demand reaches the plateau.
 - b. The port infrastructure necessary for car crossings is quickly built (we assume two years) , which results in a major increase in the number of passengers.
2. Pessimistic scenario:
 - a. Promotional campaigns result in a 5% increase in the number of passengers per year and stagnation after 10 years.
 - b. The building of the port infrastructure necessary for car crossings is delayed and takes up to 10 years, which however will result in a major increase in the number of passengers, but not as large as in the case of the earlier opening of a terminal.
 - c. The low quality of promotional campaigns causes the initial number of passengers in 2012 to be lower than in the optimistic scenario.
 - d. The poor effectiveness of informational actions results in that the largest group of passengers go for one day excursions.



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We do not count the number of cars, but passengers.

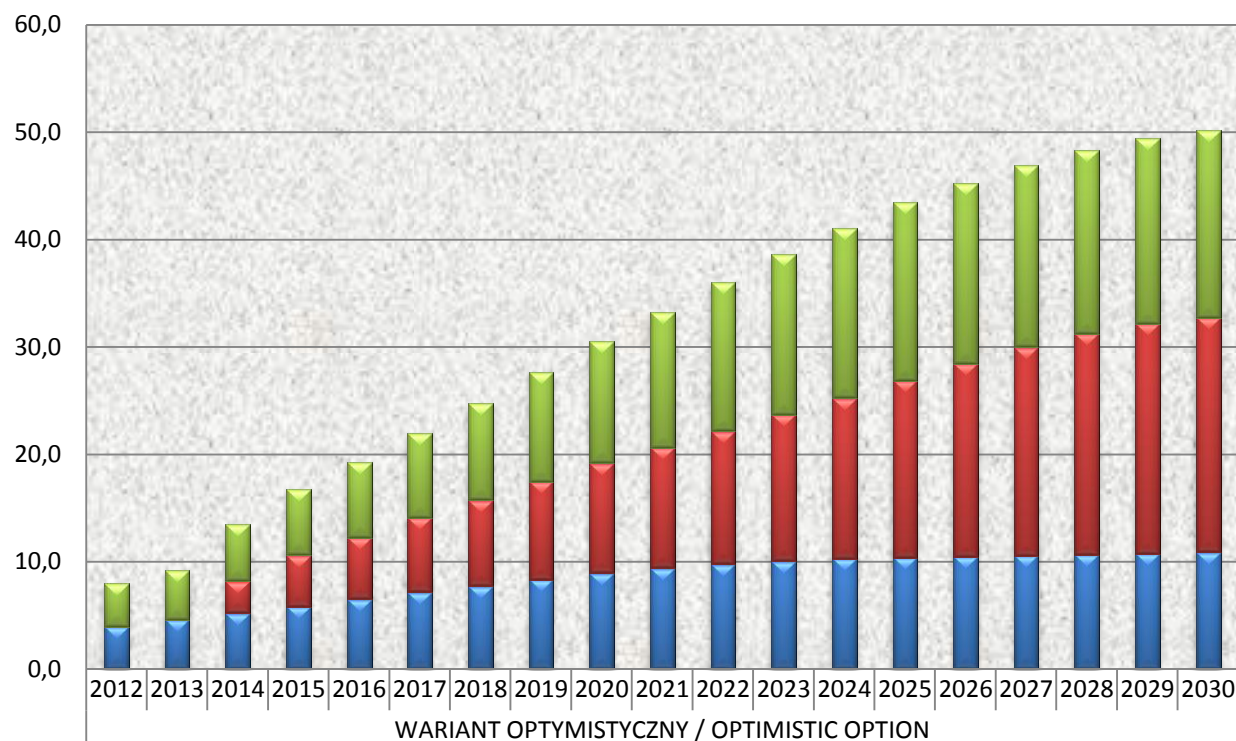
The forecast covers the period from 2012 to 2030.

We assume that even in the pessimistic version the number of passengers will rise year by year - which differs from the experience of previous years.



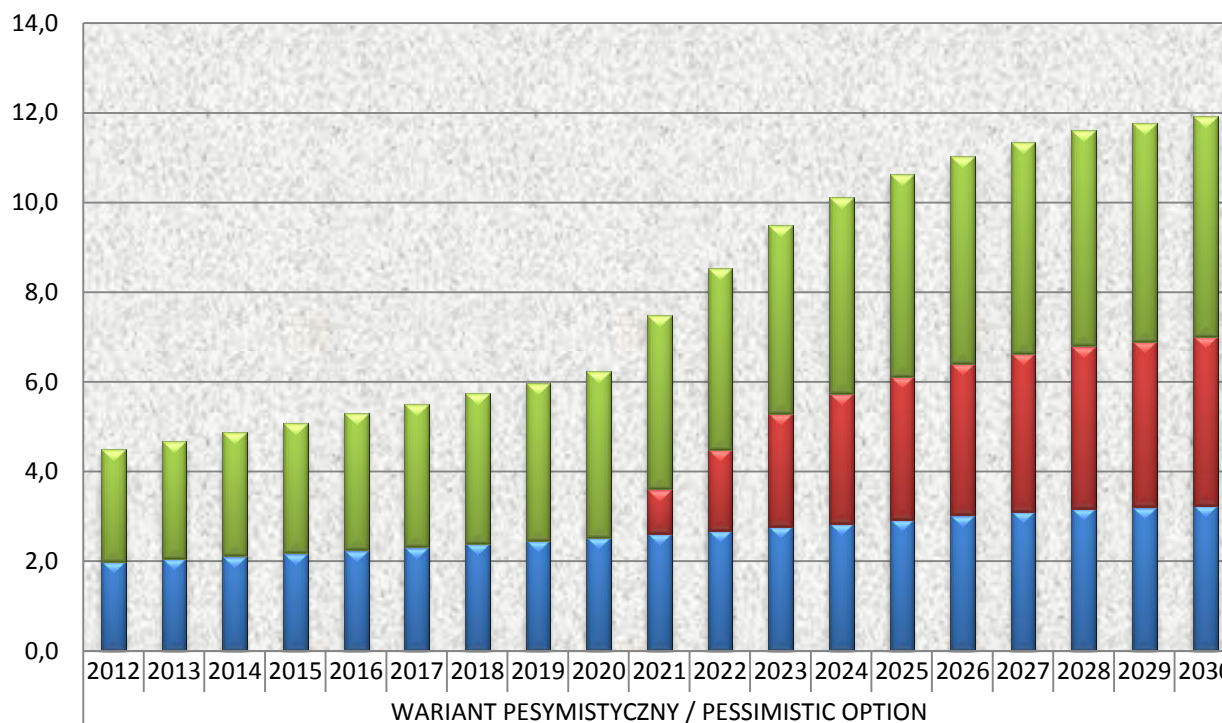
Proгноза przewozów pasażerskich na Bornholm - wariant optymistyczny

Estimation of the number of passangers on the Bornholm route - the optimistic option



■ ilość pasażerów jednodniowych (tys.) / number of one-day trips	4,0	4,6	5,3	6,1	7,0	7,9	8,9	10,1	11,3	12,5	13,8	14,9	15,8	16,6	16,8	16,9	17,1	17,3	17,4
■ ilość pasażerów zmotoryzowanych (tys.) / number of passangers with cars (thousands)	0,0	0,0	3,0	4,8	5,8	6,9	8,0	9,1	10,2	11,3	12,4	13,6	15,0	16,5	18,0	19,4	20,6	21,4	21,8
■ ilość pasażerów niezmotoryzowanych (tys.) / number of passangers without cars (thousands)	4,0	4,6	5,2	5,8	6,5	7,2	7,7	8,4	9,0	9,4	9,8	10,1	10,3	10,4	10,5	10,6	10,7	10,8	10,9

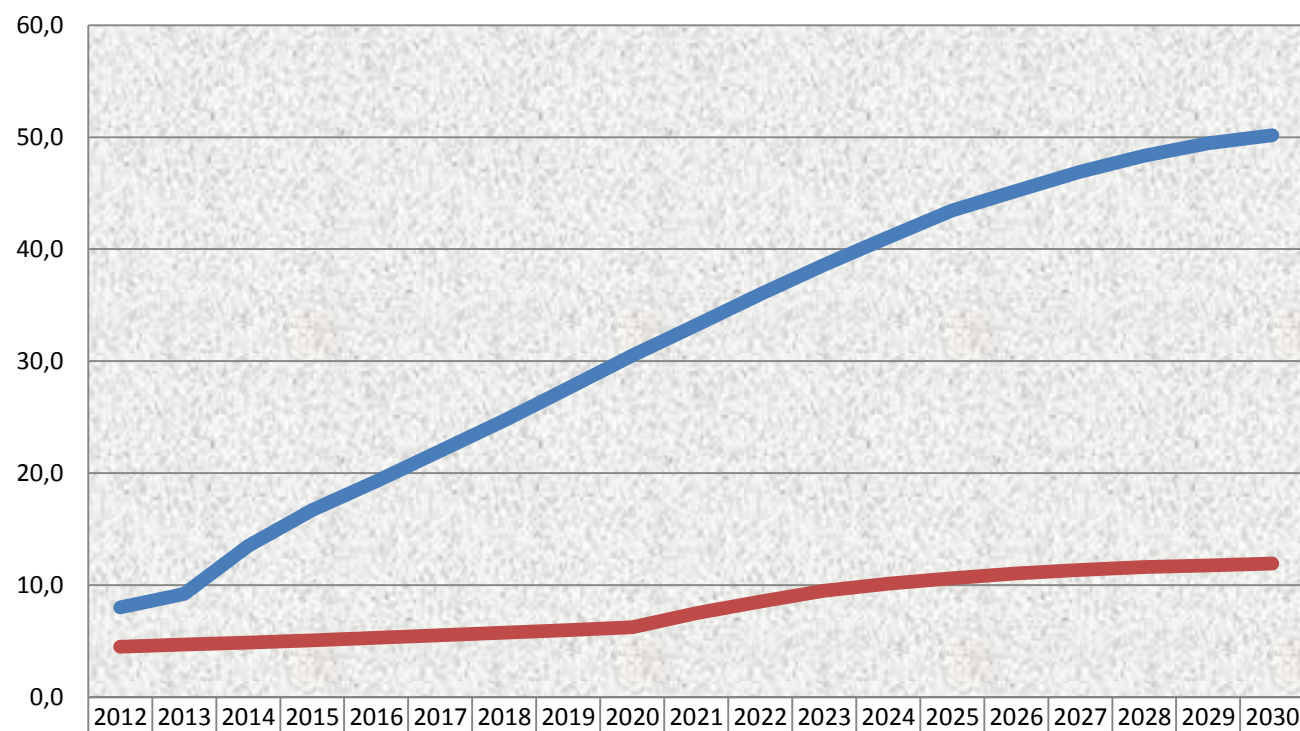
Proгноза przewozów pasażerskich na Bornholm - wariant pesymistyczny Estimation of the number of passengers on the Bornholm route - the pessimistic option



■ ilość pasażerów jednodniowych (tys.) / number of one-day trips	2,5	2,6	2,8	2,9	3,0	3,2	3,4	3,5	3,7	3,9	4,0	4,2	4,4	4,5	4,6	4,7	4,8	4,9	4,9
■ ilość pasażerów zmotoryzowanych (tys.) / number of passengers with cars (thousands)	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	1,0	1,8	2,5	2,9	3,2	3,4	3,5	3,6	3,7	3,8
■ ilość pasażerów niezmotoryzowanych (tys.) / number of passengers without cars (thousands)	2,0	2,1	2,1	2,2	2,3	2,3	2,4	2,5	2,5	2,6	2,7	2,8	2,9	2,9	3,0	3,1	3,2	3,2	3,2



Porównanie prognoz przewozów pasażerskich Comparison of the estimated number of passengers



Porównanie prognoz przewozów pasażerskich / Comparison of the estimated number of passengers

Wariant optymistyczny (tysiące pasażerów) / Optimistic option (thousands of passengers)	8,0	9,2	13,5	16,7	19,3	22,0	24,7	27,6	30,5	33,2	36,0	38,6	41,1	43,5	45,2	46,9	48,4	49,5	50,2
Wariant pesymistyczny (tysiące pasażerów) / Pessimistic option (thousands of passengers)	4,5	4,7	4,9	5,1	5,3	5,5	5,7	6,0	6,2	7,5	8,5	9,5	10,1	10,6	11,0	11,4	11,6	11,8	11,9

CONCLUSIONS

The results of the survey give the following conclusions:

1. There is a big demand on the Polish side for sailings to Bornholm, also with a car.
2. Among the tourists visiting Bornholm there is quite a large group interested in spending holidays (or a part of them) in Poland, also with a car.
3. Among the Polish tourists spending their free time at the coast there is a very low knowledge of Bornholm.
4. Among the tourists spending their free time on Bornholm there is a very low knowledge of the Polish coast of the Baltic.
5. Darłowo currently does not have the necessary port infrastructure for activating passenger-car ferry connections.

Recommendations:

One-day sailings

Passenger crossings on the Darłowo Bornholm route can be started even now. There is tourist potential on both sides of the route. However, this is only potential. In order to change it into actual demand it is necessary to conduct a number of promotional-informational activities. The survey showed that Poles staying in Darłowo have no idea of what can be seen on Bornholm. The same can be said in reference to Poland about people staying on the island.

One-day trips to or from Bornholm to Polish ports can become a popular tourist attraction. In order to popularise such trips local campaigns will suffice. One-day trips are not an offer that could bring in clients from inland. It is an attraction that should be addressed to people already staying in Darłowo and on Bornholm. Due to this the web should not be the main communication channel. Instead, the more traditional forms should be used: flyers, posters, folders etc.

Attractions and entertainment should be prepared for those crossing the sea. They should not be left on their own once they disembark, but should be informed what they can see or try.

The survey shows that the duration of the ferry crossing is a serious inconvenience. Therefore the crossing should be shortened to the maximum, especially so for one-day trips. This of course requires a suitable ferry.

Another issue that can have a serious influence on the success of one-day trips is the price. The price analysis was not included in the survey. However, it is essential to conduct a **price elasticity analysis** in order to find the optimal ticket price for one-day trips.

In order to succeed in the undertaking the strict cooperation of the authorities of Darłowo and Bornholm is essential.

Regular car-passenger ferry transport services

This offer is addressed to those who have decided to visit Bornholm with the intention of spending there several days or to those who, after staying on Bornholm, have decided to spend some time in Poland.

Despite the large potential for car-passenger connections from Poland to Bornholm, it is necessary – as in the case of one-day trips – to implement a wide informational campaign. Promotional activities should be addressed to Polish tourists acquainting them with the possibilities of spending an attractive holiday on Bornholm. Promotional activities should concentrate on the web and also travel agencies, which should be able to sell ferry tickets and inform of the possibilities offered by Bornholm. A special offer should be prepared for foreign tourists which would “code” in their minds the fact that the Polish coast may be an interesting place for holidays. The difference in the quality of the tourist infrastructure (at least currently) must be borne in mind. For this reason the offer must be constructed very carefully, taking into account national preferences and biases (e.g. Germans). Promotional activities should be accompanied by the development of the tourist base, including not only accommodation, but also restaurants, interesting bicycle trails, tourist routes, culture etc.

However, before the above can be implemented it is necessary to convert the port in such a way as to enable the entrance of car-passenger ferries. The following must be built:

1. Platforms for the loading of cars,
2. Parking space for cars awaiting boarding,
3. An adequate passenger terminal,
4. Easy access ways to the port - at the moment the access ways to the port pass through the city.

In accordance with information given by the port authorities it is possible to develop the port in a suitable manner.

The possibility of reaching the port from other Polish regions constitutes a separate problem. The A1 motorway ends in the Tri-city. The expressway S3 ends in Goleniów. Between these two points runs road no 6, by which you can reach Darłowo. Unfortunately there is no convenient, quick road connection from central Poland to middle part of Pomorze. This is an inconvenience, but not to such an extent as to cause drivers to sail from Sassnitz.

The activation of car-passenger transport from Darłowo would result in a drastic fall of the number of Polish passengers from Sassnitz, as the latter is very far from most of Poland's regions. A skilful promotional campaign advertising Bornholmu should not reduce the number of passengers travelling from Kołobrzeg. **Appropriately conducted promotional activities should generate such a number of new clients that the problem of competition with other Polish ports should not arise.**

The growth of the city's and port's rank will be a vital, additional result of the activation of a passenger-car ferry service. This will undoubtedly quicken the development of the city and its surrounding areas.

It is essential to cooperate with a shipping company possessing ferries suitable to the port in Darłowo as well as capable of meeting the growing demand for transport to and from Bornholm.

Close cooperation with Bornholm's local authorities is necessary in order to:

1. Increase knowledge of Darłowo among tourists visiting Bornholm
2. Increase knowledge of Bornholm among tourists visiting Darłowo

It would be advisable to plan wider-scale promotional actions abroad – especially in Germany, advertising Pomorze as an attractive holiday destination.

A further vital issue to be remembered is the need to stretch the tourist season further beyond the traditional summer months of July and August. The period from May to September may be potentially attractive for many tourists.

It must be unconditionally remembered that in order to successfully establish a ferry connection with Bornholm it is necessary to HARMONISE PROMOTIONAL ACTIVITIES WITH INFRASTRUCTURE INVESTMENTS.



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