

Tourism practices and the production of “destinations”
- Representations, networks and strategies

Tourism Business Networking and restructuring on Bornholm

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1.0 Background

This project is part of a major project with the objective of investigating the practices of tourists, locals and tourist businesses. The overall research question is located in the intersection of webs of tourist mobilities and projects of reconstructing destinations. It is also investigating the local consequences of a possible trend towards flexible tourism. To understand the intersections of tourists and tourist industries better, focus is on three main research questions: One on tourist practices, one on tourist industry “destination” building and one on the crucial encounters between them.

1. How are tourist practices spatially structured and culturally experiencing and representing places?
2. How are tourist business networking and restructuring places in producing “destinations”?
3. How are spatial strategies “negotiated” in encounters of tourists, tourist industries and locals?

This report is focusing on the second question. In the research questions, there is underlying the hypothesis that the trends of growing tourist mobility, growing importance of non-local tourist business networking (and concentration) and increased international competition in tourism is giving the local tourist places even more important roles in tourism development.

2.0 Theory

Since tourism basically combines mobility with the high value of experience in proximity in combinations of “face-to-face”, “face-to-place” and “face-the-moment” (Urry, 2000b), we would expect local relations, places and events to play a more important role than national stereotypes. At the same time, the concept of “destination” is problematic as it relies on an “unfit identification of place and practice” (Haldrup, 2000). Tourist mobility seems to work in the combination of experience of mobility with the “Tourist Glance” (Larsen, 2000) and diverse tourist time-geographical strategies of visiting and experiencing as a combination of very different places (Haldrup, 2000). Small signs such as a decline of the number of organised sightseeing tours to Roskilde (interview by Framke) exemplifies a possible trend of what we could call “flexible tourism”. Tourism research on the “tourist” side is increasingly aware of the needs to develop conceptual understandings, where tourists are not only visiting specific places but also travellers in movement. This can be understood as the dynamics of tourist “flow-place”.

The tourist industry includes public and private (more or less business-like) actors in a continuum from the Tourist Board of Denmark, travel agencies and international hotel chains to the local tourism entrepreneurs living with the tourists in her gallery or accommodation. Municipalities, local tourist information offices as well as local events, sights, hotels and restaurants are other important tourist industry actors. The different kinds of networking between such different actors are crucial to the dynamics of the tourism industry. These networks and actors can be analysed in terms of different forms of social capital (Bærenholdt, 2000). Meanwhile, the tourism industry is nothing without interaction with tourist flows in places. The “moments of truth” in tourism are place-bound encounters, where the “tourism product” is essentially a question of the performances and experiences of tourists and industry. (If place is conceived as a route, this is also the case in transporting tourist industry and mobile tourist glances.) Like other experience industries, tourism is a co-production, where the meaning of the conceptual division between production and consumption can be questioned (Haldrup, 2000). Production of places in space can be said to be the very crucial practice in tourism. From the perspective of the practices of the tourist industry, the combination of different kinds of networks (local and non-local, personal and organisation) in place production by projects of “destination building” is in the centre of interest. Clearly, “destination” is a concept of the tourism industry pursuing to make their place a destiny of the tourist. Meanwhile, it is also a network concept of co-operation between actors in the tourism industry (Framke & Bærenholdt, 2000). Therefore, the dynamics of tourism industry practices can be understood as tourist industry “network-place”, which includes all aspects of the projects of “destination construction” or maybe better “destination” building.

Focus is, so far, on tourism practices, defined as practices of tourists and tourist industries, and the place-specific intersections of these practices are in the centre of interest, if we want to understand the very “nature” of tourism

in detail. Therefore, rather than with the metaphor of the destination (the end of the journey), the dynamics of tourism could be better represented in the double intersection of

Tourist “flow-place”
and
Tourist industry “network-place”

Here places are the specific “regions” where tourist experience is produced in proximate interaction with the tourist industry as well as with the

Landscape as place-place of locals

Important actors in local tourism development are to be found at the political level of local authorities (municipalities). Local authorities are actors in the tourist industry “network-place” in so far as they are involved in the development of tourism, but they are also connected to landscape as place-place of locals. Within this project, landscape as place-place of locals is mainly studied as tourist attraction in the form of rural and urban environments and heritage sites at places where also locals live (work and recreate). A deeper understanding of local people and landscape in the production of “destination” and tourism’s consequences for local people and landscape is beyond the scope of this specific project.

In the framework allowing tourists to compose specific routes through places, the role of national marketing and channels of booking (Internet Portals etc.) is a mediator between a number of modes of tourist business organisation from the locally controlled tourist service and attraction to the multinational chain. We expect that specific places (sights, attractions) are crucial nodes in tourists’ reflexive choice and organisation of travelling, oriented towards “true” experiences. Proximity to local “original” key-persons seems to be a major attraction. These locals, often hobby-entrepreneurs more than professional business actors, communicate directly with tourists “face-to-face”. Furthermore, spatially fixed attractions are important for the tourist desire of becoming “face-to-place”, as well as “just-in-time” tourism securing the time-space “unique” experience of being “face-to-event”. Virtual and imaginative travel do not ‘replace’ physical proximity, as virtual and imaginative mobilities constitute new ‘desires’ for co-present experiences. Possibly, more emphasis has to be put into the kinesthetic sense (Urry, 2000a). Crucial tourist experiences are not only perceived but also performed in inscribing movements. This is not only the case in transport between-place, but especially in bodily movement in-place.

Much of these characteristics of tourism, the validity of which we would like to investigate empirically, challenge the traditional concept of “destination” (Haldrup, 2000). Meanwhile, “destinations” are crucial to political strategies of the local and regional tourist managers and politicians in their attempts of governance on behalf of the livelihood of people having the local as their destiny (citizens as opposed to tourists). Destination building can be seen as

projects of developing the attraction of places to and facilitating the in-flows and movement-in-place of tourists. These projects are concrete attempts of local restructuring; on the other hand projects are often developed in networks with non-local or mobile actors (e.g. artists that are permanent seasonal tourists). Also in respect to the innovative dynamics of such projects, there seems to be important intersections of mobility and proximity in the networks (social capital) crucial to the development of such projects (Bærenholdt/Aarsæther, 2000). A crucial point is to investigate whether or not the severe problems in co-operation in the tourist industry, often reported, have any kind of structural reasons due to the character of – more or less flexible – tourism (Framke & Bærenholdt, 2000).

3.0 A structure problem

One way of looking at the concept of destination is to define it from the perspective of *horizontal* and *vertical integration* between tourist enterprises. With the concept of *diagonal relations*, the travel agent or the tourist will take over some of the work of the tour operator by using IT-transmitted information (Poon 1993; Marcussen 1999; Framke 2000;). An important question will then be: how can networks (vertical and diagonal) coordinate the efforts from the territorial perspective of the locality by balancing stability and flexibility, and how do such networks depend on the “insularity” or logistic of the locality?

In order to understand the construction of a destination out of these integrations, relations and networks, it is necessary to define the actors and the motives behind the acting of the actors. Especially the political structure of the destination is important in that respect, since the political structure forms the framework for the stakeholders and entrepreneurs.

The integration process forms, constructs and reconstructs relations and networks at the destination. This process can be described as a three-step process: a structural process, a social process and a psychological process.

The structural process

The structural process forms the framework within which the integration takes place. By studying the structural process of a destination, it is possible to identify driving forces (actors and sectors) and the explicit and implicit motives for interacting initiatives within the destination and thereby better understand how these types of processes arise. Political, commercial and non-profit organisations act in a mix in order to position their interests. Another way of looking at the actors is to divide them into formal and informal actors.

The social process

If the structural process *makes it possible* for sectors and actors to interact, the social process *implements and realises* these possibilities. Networks and co-operation – both formal and informal - is the normal outcome of this process. The social process opens up for the dynamics of a destination. Places – destinations - are not fixed areas but the result of such social processes, where time and place form intersection points for different actions of people over time (Simonsen 1993). Keywords for that process are: contacts, co-operation, dynamics, exchange (formal and informal), experience, networking and so on. The social process causes and is caused by trends and patterns like mobility and flexibility. In other words, the social process constructs or reconstructs the intersection between *flow-place* of tourists and *network-place* of tourism industry at the destination.

The psychological process

When people are involved in the interacting process at a destination, created by actors and sectors within the structural context, they can either refuse or

promote a reconstruction of the structure of the destination. Saying yes to reconstruction, they use the possibilities created by the process and identify themselves with the new integrated situation and feel part of it even emotionally. At that time, it is possible for the original actors and sectors to change the rules for the structure in order to facilitate interaction between different sectors or systems.

4.0 Methods

In the network perspective, a rather general “mapping” of how tourist industries co-operate has been undertaken. This has been investigated through qualitative interviews with carefully selected key-persons starting at local level. A section of each interview is concentrated on the selected case-places as moments in “destination” projects. Attention is given to entrepreneurs active in co-present encounters with tourist in case-places. Different types in respect to networking and projects of “destination” building has been high-lighted.

As a base for the mapping, results from several previous investigations have been used. They rank in time from 1997 up till today and by that they also offer a more long-term perspective to the dynamics of the tourist *flow place* and the tourism in industry *network place*.

5.0 Bornholm

1. *The atmosphere of Bornholm* - a study 1997 by Jan Lingvall.

There has been a lot of studies on the special conditions prevalent on Bornholm for business development. Mikkelsen (1997) investigates 55 different reports on the subject from 1988-1995 and of these are 12 about tourism. From 1995, a quarterly updated survey is managed by the Research Centre of Bornholm (Rassing 2000) which mirrors expectations, experiences and behaviour of tourists when they come to or leave Bornholm.

The reason to start with Lingvall's unpublished and modest report lies in the fact that Lingvall looks upon the island from outside and with the eyes of a former manager of other destinations (in Sweden). He has personal experience of how to cope with tourism as a commercial activity.

I

Lingvall categorizes the attractions of Bornholm into *nature-based* (like Helligdomen and Ekkodalen), *culture-based* (like Hammershus Castle and Bornholm Museum), *man-made* (like Jobo-land) and *events* (like bicycle competition and festivals).

The use of the attractions are interdependent of *service* (like accommodation, shopping, public service etc), *accessibility* (physical like transport capacity, psychological like how the travel has been experienced and economic like if it has been price worthy or not), *information* (like the possibility for the customer to get all kind of offers) and *marketing* (like the efforts to get the tourists to the island).

Lingvall states that it is a delicate task for a destination to offer a comprehensive product and only the tourist can judge the outcome of these efforts. The local residents must be involved in that product since they are a considerable part of the experience of the tourist at the destination.

In order to get use of the components service, accommodation, information and marketing at a destination, the reason for tourists to go there must be known.

By using the *Survey of Visitors to Bornholm* - the data-base run by the Research Centre of Bornholm – and especially the figures from 1995 and 1996, he found three important reasons for tourists to come to Bornholm: *nature*, *landscape* and *atmosphere*. The same patterns were found among Danish, Swedish and German tourists. The total number of tourist overnights in 1997, according to the survey, was almost two and a half millions (Zhang & Rassing 2000).

To start with marketing, the island was not sold very much by brochures or guide-books. Both Swedes and Danes said that relatives and friends were the main information sources. That is, primarily, also the case for the

German tourists but they also use brochures and guide-books. More than half of visitors in 1996 were repeat visitors.

If we turn to attractions, Lingvall found that in 1996, Helligdomsklipperna was the main *nature* attraction that was visited by tourists. A middle group of visited attractions consisted of Ekkodalen, Paradisbakkerna, and Jons Kapel. Christians ö came in the last group of visited attractions (47 000 visitors in 1996). There were no homogenous picture of how nature attractions attracted visitors.

The same year, Hammershus and Østerlars Church were the main *culture* attractions. They were outstanding with 350 000 and 133 000 visitors. The museums were in focus for all visitors: Bornholm Art Museum (72 000), Farm museum (27 335) and Bornholm museum (15 763). Culture attractions formed a more homogenous picture.

Visit the beach, shopping, eating and relaxing were main activities for all tourists on the island, regardless nationality. A minority was walking and cycling. Social “togetherness” seems to be important.

Lingvall met a lot of people talking about the *atmosphere* of Bornholm. He wondered over what that meant. He eventually found that the concept probably was based upon nature, village environments and the local residents.

Nature on Bornholm, he says, is very varying from rocks to sandy beaches. Flora and fauna are interesting features of the island and the climate is comfortable. For some, Bornholm is Denmark as a miniature. It also seems to be important that Bornholm is an island. It is something limited which you can get a comprehensive feeling of.

Village environments, he says, seem to be essential for the image of the island. Villages like Gudhjem and Svaneke represent much of what tourists connect with Bornholm. The small scale, the attractive exterior of the houses, the variety of handcrafters and small shops, the closeness to the sea, the hilly topography and a large and active local population. The expression *small is beautiful* is part of Bornholm.

Local residents play an important role for the atmosphere. He did not find villages and small towns too dominated by tourists. The harbour festivals for example are arranged by locals and not by tourist entrepreneurs.

Despite being an economist, Lingvall has not his focus upon the entrepreneurs. He is judging the attractiveness of the island as a base for commercial activities so he has to start with what draws the tourists to the island. It is very easy to count visitors when they visit attractions where there are some indicators telling how many they are, for example sold tickets. It is of course more difficult to know what tourists do when they are doing things not possible to estimate the degree of. These activities may, however, be of

great importance for understanding the *flow-place* dynamics of the destination.

II

Lingvall's findings are interesting in at least three respects.

First, visits to most attractions are well documented by data from the survey in the cases tourists were asked if they had visited these specific attractions. Culture attractions form a homogenous group of attractions even if they are sparsely commodified. Nature attractions are not exploited in the same manner. There are obviously a lot to do in order to use the resources in a more effective way, especially with regard to nature attractivity.

This is underpinned by other studies (e.g. Fitje 1956). He finds that the organisation of different nature-based tourism-products on Bornholm is loose and relatively unstructured. Many actors contribute in very different ways, which makes it difficult to get a comprehensive picture of the structure. Lack of co-operation can be a result of the lack of organisation structure. Fitje finds, however, co-operation both in horizontal (quality improvements) and vertical (in order to enlarge the season) networking. Examples of horizontal networking is golf and guided tours. Example of vertical networking is Bornholm Traffiken.

Second, atmosphere seems to be a strong image for Bornholm but not very much used because atmosphere is difficult to connect to the single business activity. It is a more comprehensive image, linked to the destination as a whole.

Third, if most tourists come to Bornholm because of information from friends and visitors or own experience, then there is something to do for the marketers.

III

Lingvall's investigation shows some features of the status of Bornholm with regard to tourism. He does, however, not connect to the networking process of Bornholm. He is just mapping parts of the frame for the structure of the destination. The main problem for the island, Mikkelsen (1997) states, is the population development and the insular location. Together with that, he finds that the *lack* of co-operation as the main barrier for a change of the development: “..øn emmer af lokale uenigheder” (p 77).

Elin Sundgaard (1997) gives a picture of the hotel structure with the year 1995 as a base. She states that the majority of the hotels and pensions on the island are small or medium-sized and the owner (and the spouse) is normally fully employed in the own business. Most hotels and pensions are open part of the year and few owners have a background or education from hotel or restaurant management or service.

Sundgaard finds that a majority (75 %) of the hotels, however, are members of some co-operative association. Sundgaard concludes that there is a profound difference between running a hotel or pension in a more central location than what is the case with peripheral Bornholm. Together with Mikkelsen's findings, this conclusion can be a point of departure for a discussion on how Bornholm as a destination copes or should cope with its future.

Lingvall is just mapping parts of the frame of structure of the destination, necessary as a base for that discussion. But his findings indicate a first step.

2. *The Bornholm Tourism Industry and its views on IT, Customers and Competitors* - a study Nov/Dec. 1997 by Wolfgang Framke.

Research Centre of Bornholm offers annually its facilities and environments to guest researchers for a visit at the Centre for shorter or longer periods. Professor Wolfgang Framke, responsible for the tourism program and research at Business School of Copenhagen at that time, spent half a year at the Centre 1997-98 and made an investigation of the tourism industry on Bornholm. It can be seen as a follow-up of Sundgaard's (1997) study and as a more comprehensive attempt to map the frames for the destination.

I

Framke interviewed 25 different actors within the tourism industry of Bornholm. There were eight hotels and five pensions interviewed. Eight local tourist bureaus and coordinators, two transport companies and a local tour operator were also interviewed. The focus of his study is the status of the activity (actor) and networks.

The hotels interviewed by Framke can be divided into two different categories: *all-year-round* hotels (4) and *seasonal* hotels (4). The all-year-round hotels have between 20 to 50 people employed and they rely on business tourism to a great extent. They offer conferences and courses as well as accommodation for bus groups and individual business visitors. The seasonal hotels are open from April to October. They rely more on holidaymakers. The most typical feature for these seasonal hotels is the almost total focus on German tourists (from 50 % to almost 90%).

For the business-oriented *all-year-round hotels*, Danish and Swedish guests dominate. For the biggest one, Scandinavians seem to dominate almost to 100 % and for the smallest one, Germans tend to lag behind while the number of Swedish and Norwegian tourists slightly increase.

Networking seems to be modest for all hotels open all-year-round. Poon (1993) presents three types of networking: horizontal, vertical and diagonal. *Horizontal* networking covers the co-operation between businesses at the same production level, known as chains. The purpose is to facilitate economy-of-scale benefits. *Vertical* networking tries to follow the demand pattern of the tourist and his opinion on the tourism business supply of partial products within an integrated product. The goal is to organise as many of the parts of the integrated product in one organisation as is possible and thus gain control of the integrated tourism product. The *diagonal* networking attempts to combine service providers so that they are able to meet different demands with an integrated product (Poon 1993).

The concept of horizontal, vertical and diagonal networking is possible to adapt to the conditions prevalent on Bornholm but only after modification. For the all-year-round hotels, horizontal networking means co-operation with other local hotels. Just one of the hotels is owned by an international hotel chain. The vertical networking is applicable on the position of the

specific hotel in the booking system, from global level to national, regional and local level. The all-year-round hotels have developed that type of networking very well on a regional and national level as well as on an international level. The diagonal networking for these hotels takes a much more modest form on Bornholm since it is mostly a matter of co-operating with other actors or operators at local level. It may perform in many different forms. One form is to organise package tours where other actors on the island become involved, especially if the package is based upon a bus group. Another form is to use nature or culture as attractions and form a package of oneself with no use of other firms. A third way of diagonal networking has with public sector or organisations to do. The owner of the hotel may be a member of a public board or an organisation. Public educational institutes are also used for training of the staff or for recruiting new staff.

Public authorities are sometimes seen as good co-operators and sometimes as barriers. Transports are generally seen as barriers. One hotel owner, however, looks upon ferry transport as an asset: Bornholm is a place to sail to and it is wonderful to sail. It is also the only place to go to in Denmark where you can sleep during the transport.

The *seasonal hotels* do not have many business tourists. They are totally dependent on holidaymakers, normally from Germany but also from Denmark and Sweden. The Norwegian market is growing.

Significant for these smaller hotels is their structure of networking. Here it is very clear that the concept has to be modified for the local conditions typical for Bornholm. While the bigger hotels always were good at vertical networking (positioning themselves in the booking system) and more modest about horizontal networking (co-operating with other hotels), the small hotels put lesser effort on vertical networking. Their booking strategies are very much *ad hoc*. Horizontal networking is on the other hand quite natural for them, probably because of they are firmly anchored in the local society by being born and grown up there. This co-operation often consists of contact with relatives or friends who are owners of other hotels or facilities. There are a lot of local connections. Diagonal networking has the same base: relatives or friends with one or another offer.

If we go further in Framke's questionnaires, we find that *pensions* confirm that difference according to networking even more than the small hotels. Their *modus vivendi* has very much to do with use of local connections.

Framke asked the hotel owners about attitudes to change and the answers he got indicate that they were aware of changes but not always how to cope with these changes of trends and mobility pattern of the tourists. They think it will function the day they face with the changes. The changes Framke especially asked about were a more demanding attitude from the customers' side with regard to standard, mobility, environment and political correctness.

More important perhaps than change of attitudes are changes of outer conditions. These are normally out of control for the industry even if some can be planned for, like new infrastructure (the new bridges over Store Bælt and Øresund or the fast ferry from Ystad to Rønne). Other changes come like lightning from heaven. The drop of the value of the Swedish currency, for instance, was something that radically changed the conditions for most of the tourist industry on Bornholm.

Framke also interviewed Destination Bornholm and different tour operators and tourist bureaus on the island. Their market consists mainly of the German market and 53 of the guests are coming from there. Destination Bornholm had a clear ambition to strengthen the vertical networking and by that make it easier for the hotels to improve their positions in the booking system. The horizontal networking was not totally the destination's cup of tea. The ambition was there and efforts were made to integrate the different offers of the different entrepreneurs and to synchronise their marketing efforts. But the Destination Bornholm found it important that many small companies, like the smaller pensions, met tourist demands for small and cheap accommodation with personal contact between tourist and host. Interference in that work from the destinations side could be counter productive for the interplay between tourists and entrepreneurs of this scale and level.

Bornholm Trafikken on the other hand was more dedicated to the horizontal and diagonal integration. They try to sell packages where their own transport is the core and then by co-operating with a couple of tourist bureaus on the island which can give added value to Bornholm Trafikken and its transport packages.

The tourist bureau Sydbornholm had a clear focus on horizontal integration. They co-operated both within the island and with actors outside the island. The main offer were summerhouses and the German market dominated totally (88 % for 1997).

II

Framke's findings are interesting out of a couple of aspects.

First, he shows that there is a clear difference between the all-year-round hotels and the seasonal hotels. It has primarily to do with the different use of networks. The all-year-round hotels are more dependent of vertical networking and therefore also elaborating that type of co-operation more than the other hotels. By that, they are more independent of local conditions.

The seasonal hotels and the pensions compensate their lack of ability to use the vertical networks by enlarging their horizontal networks. It is natural for many of these smaller firms since they are owned and run by local residents in most cases. They have their network on the island and they use it as often as they can. That can be seen as a form of social capital, crucial for their survival as entrepreneurs.

The diagonal networks are promoted by the tourist bureaus and the tour operators together with Destination Bornholm. They see it as their task to elaborate webs of contacts between different levels of the tourist industry, especially linking the local industry to different types of regional, national and international contacts not directly seen as part of the local product but as potentials for developing the local products.

Second, his findings show that the networking concept, discussed by Poon (1993) has to be modified in order to work within a small and peripheral, but tourist dominated, destination like Bornholm. The vertical dimension is mostly a question of booking and marketing, the horizontal dimension is more about connection with colleagues at the destination, and finally the diagonal dimension is more about giving added value to the product from different potentials based both on local but also non-local environments. That added value is often given as a result of *ad hoc* activities, not as a result of strategic planning.

Third, his findings also say that hotels with a highly developed product and vertical network rely to a great extent (sometimes totally) on business tourism while hotels and pensions who rely on holidaymakers. Business tourists are mainly domestic or Scandinavian while the holidaymakers are mainly Germans.

III

Framke's investigation forms a more comprehensive picture of the structure of the destination of Bornholm. If we add Framke's finding with those of Lingvall, we can see that there are ideas of how to develop the potentials of the island either by exploiting the nature attractions or by marketing the concept.

If we look at networking in a more traditional way on Bornholm, it is obvious that there is an existing networking which has been working for long time. Hedetoft & Manniche (1999) take their point of departure in citizen associations - *borgerforeninger* – which is a frequent form for local co-operation all over Denmark. On Bornholm, some these associations are quite industrious and active, either on an array of issues or on just a single question. They can be seen as a sort of *social capital* creating a base for co-operation and networking. The question is, however, if transition and change are specific goals for these associations or if sustainability or preservation better reflects the interests of their board members.

An example in the study of Hedetoft & Manniche is an association of people of a small village on Bornholm where the objective was to attract more employment and activity to the village. These attracted or created activities and companies had, however, to fit in with the local structure and were supposed to contribute to places of work with special types of activities like quality handcraft or small-scale business (p 86). It could be labelled as "change in order to encounter change".

The structure is, however, a bit complex. Some of the actors are quite good at using channels for marketing and booking and other actors are good at making their product as diversified as possible within their frames of economy and staff. The former are using their skill on vertical networking while the latter are better at horizontal networking. In both cases, diagonal networking is defined as good contacts with the political system.

The investigation shows that a social process is ongoing on the island but it is not clear in what respect a more psychological process has started. More knowledge has to be produced in order to understand that structure.

3. *The marketing strategy of Bornholm - a study 1999 by Ann Hartl.*

The survey of tourism on Bornholm was designed and managed by professor Stephen Wanhill and administrated by Ann Hartl and Charlotte Rassing. Ann Hartl has, among other sources, used data from the survey for her (forthcoming) PhD-thesis. She has also made a more intense study of Destination Bornholm.

I

Hartl made in 1999 a study of the development of a strategy process on Bornholm. Four topics were in focus: network, strategy, marketing within the concept of the destination as a company. Her study goes by that beyond a study just on mapping the structure of the destination. She looks for a deeper insight in the social and psychological process even if her focus is more upon marketing strategies than on networking.

Hartl starts by a discussion of what destination, marketing and strategy is about. Since destination often is a geographical concept and since Bornholm is a strictly limited geographical area, she accepts the geographical dimension of Destination Bornholm as a restriction of the definition for her study. A definition of marketing includes, however, a concept of labour division at the destination. According to Kotler's marketing theory about the four "p"s (product, price, place and promotion), the destination is supposed to cope with all these "p"s. The destination company has, however, only the possibility to control the fourth "p": promotion. In other words, the destination company is *the* marketer of the destination as a whole but without control over the product (price, development and so on). Kotler's marketing theory has to be modified in order to fit in with destination marketing strategies.

Hartl stresses the fact that marketing is a process ranging from the producing process by the producing company to the promotion of the marketing company. It is a comprehensive, dynamic and on-going process, which includes all its actors. She also points to the distinction between strategy as a process and strategy as a level where strategic decisions are made. In her paper, strategy means primarily a process, or – to be more precise – a description of a strategy process.

From the interviews, there are some answers, which underpin the idea that horizontal networking among smaller businesses are *ad hoc* activities. She writes: "...the networking and co-operation process is not steered by logic and casual connections but are affected by emotions and attitudes and hence rather personal relations.." (p 8). Hartl concludes that all types of noticed co-operation (from the interviews) just is the top of the iceberg. "There is a lot of informal co-operation and networking. The latter not necessarily being a real form for co-operation but for getting to know each other so it may be possible for a later co-operation" (p 10). She also notices that many of the relations are based on personal attributes: persons co-operate with those persons they like or have confidence in.

Hartl finds that economic conditions often are crucial for co-operation and that these conditions also can force competitors to go together with a joint product or concept. Technical knowledge or possible subsidies can play the same role as economy.

Hartl finds the apprehension, that co-operation is poor among entrepreneurs within tourism industry on Bornholm, a bit dubious. Most of the respondents state, that co-operation in practice is prevalent but they lack a more strategic and comprehensive co-operation from above. The destination company is, however, looked upon as a positive part of the tourism industry structure of Bornholm.

As a conclusion, Hartl discusses the public role for steering a destination. She seems to be in favour of a more direct engagement from the destination side in order to encourage a comprehensive strategy for the tourism industry at a destination. Such a strategy is necessary for developing a comprehensive marketing plan for the destination. But it also opens up for a more public interference in the tourism industry since a destination company normally is financed to a certain extent (often a substantial part) of public money..

II

Hartl states that marketing strategies are possible to do only if there is an interplay between actors at a destination, since the whole work with such a strategy is a process. A mapping of the structure and a social awareness and use of the structure is not enough. There must also be a readiness for reconstructing the structure.

Hartl's findings point to a couple of conclusions.

First, she shows that horizontal networking is decisive for smaller entrepreneurs within the tourism industry at peripheral places like Bornholm.

Second, she shows that these networking processes are much *ad hoc* and not planned as a strategy. On the other hand, they are much more frequent than expected.

Third, she discusses the role of public interference with strategy planning for the tourism industry. The positive remarks on destination Bornholm she gets from the respondents, point in that direction.

Destination Bornholm has, according to this investigation, a focus on horizontal networking within a well-defined social structure.

III

If the destination of Bornholm, according to Hartl, is based on a horizontal co-operation among actors, firmly anchored on Bornholm, it is doubtful whether that structure will be suitable to meet new challenges. When Hartl indicates, that more public support may be necessary for the development of co-operation and marketing of the tourism industry of the island (as a

support to the destination company), she is saying something about the status of that structure.

A destination is a conglomerate of several actors within the tourism industry. Hartl says herself at the start of her paper that she will interview actors within the tourism industry and that industry is defined (restricted) as dealing with accommodation, attractions, transports, and catering. Furthermore, it also includes information and tourism bureaus, she says, and at last the destination company.

The destination is hence a mix between companies for production, companies for information and for marketing. The producers operate with almost no subsidies for the production. They pay themselves together with subsidies from the communities for promotion. For comprehensive marketing they rely on a company, subsidised by the local entrepreneurs, the local and regional communities and the state.

Tourism industry is by that defined as a mixture of private and public interests where production is mainly private while co-ordination, strategy plans and marketing are of public interest. A destination has to cope with this mix and also accept that the product (the destination) they promote and market often is multi-sold, where the destination company is just one of several companies involved in the marketing.

The mixture of private and public interests indicates that the state is supposed to interfere in the development of the destination. If so, the reason for public interference must be examined. Why should state and communities interfere at all? What are the latent causes for that?

The definition of a destination as a concept of the tourism industry pursuing to make their place a destiny of the tourist, has to be modified. A destination is as much an instrument for politicians to promote their political ranger ship as a concept for industrial promotion.

4. *Erhvervsliv, transporter og udviklingstendenser på Bornholm* Report written by Jesper Manniche and Lars Nyberg. May 2000.

During the whole period from 1996 to 2000, the building of the Øresund Bridge and the start of the fast ferry have been frequent issues for discussion and predictions on Bornholm. During the winter before the opening of the Øresund Bridge (1/7 2000), several projects in the region started to monitor the process. Also on Bornholm, some projects started to investigate the possible impact of the bridge on Bornholm. The first one presented here is on transports and networking in general and the other one (no.5) presented further on in this paper is on tourism in special.

I

A destination consists of not only the tourism industry. Infrastructure plays a very important role. Transports, service and other types of industry form the structure within which the destination has to work. During the last years, profound changes of the transport pattern in the Öresund region have been planned. They will of course have an impact on Bornholm as a society.

Lars Nyberg and Jesper Manniche made in May 2000 (the fast ferry started in June and the Öresund bridge opened in July) an interview study, where they asked private entrepreneurs on Bornholm on their conditions and expectations. There were, at the time for the investigation, 571 private companies with at least two employed. Tourism enterprises were not asked since they were supposed to have very different expectations and conditions than the others. About 40 % answered. The smallest companies are those with lowest respond frequency.

Focus for the investigation was on transport. The transport situation on Bornholm is an indicator of the peripheral and insular location of the island. Most cargo transport is inbound and most passenger transport is outbound. Transport costs are important for the bigger companies and not very important for a lot of the smaller and more “domestic” companies. Expectations on the new infrastructure was moderate from the cargo side. Companies involved in that type of transport did not believe in better conditions. On the other hand, those companies with interest in passenger transport were more optimistic. A genuine scepticism over the fast ferry was general.

Manniche and Nyberg also studied co-operation among companies on the island. More than half of the entrepreneurs - with exception for the smallest ones – had one or another form for co-operation. It was mostly an informal and non-structured co-operation. Very few of the companies had co-operation based upon common ownership. Networking was important within the existing co-operation. It was about buying or selling co-operatively, about transports and marketing. It was also about common use of available resources.

Most companies on Bornholm had a “domestic” activity and many of them wanted to expand beyond the boundaries of the island. For them, transports were of greater importance than local co-operation. But there were also a lot of “micro”-companies with a high need for networking since they were small but relying on knowledge.

II

Manniche’s and Nyberg’s findings indicate that co-operation exists to a quite great extent on the island. But there is a discrepancy in need for networking between bigger companies and companies which are established on the island and prepared for expansion on one side and the very small companies with high technology. The latter need networking for survival while the other companies probably have an informal and not very conscious co-operation with other actors on the island.

It shows that the tourism industry in many respects reflects the general situation and attitudes on the island.

III

A good background to the understand the peculiar situation on Bornholm a couple of years before the study of Manniche & Nyberg, is formed by a study of Palle Mikkelsen (1997). It is a status report based on a review of 55 reports dealing with the industrial structure of Bornholm between 1988 and 1995. Mikkelsen concludes that the negative population development is the basic problem and it gives birth to other problems. Many of those leaving the island, he claims, do not come back and the inflow of skilled persons is not very significant. That causes lower productivity and education on Bornholm than in Denmark in average. He cannot foresee a quick change of these conditions but a long, hard process for development. Most efforts from the government are encountered by local split.

Mikkelsen finds it remarkable that the public sector, in spite of its dominance on the island, not has been investigated by the researches to any greater extent. It seems to be uninteresting for the development of the industrial sector on the island and that may be true. But the potential, Mikkelsen claims, is there. The communities have the potential of being the vehicle for development by their size and financial muscles. The bridge and ferry will give the island better infrastructure and it will give better openings for the industry and the politicians of Bornholm to a growing Copenhagen area. He concludes, that now – several years before the anticipated bridge and fast ferry – it is time to plan and make decisions.

All these reports show a state of standstill for the industry on the island in many respects. Creativity, co-operation, networking, self-confidence: all these items seem to be lacking on the island. On the other hand, tourism business is running well, even according to Mikkelsen.

5. *Tourism and Integration in the Øresund Region – theory and reality for Bornholm* –by Lise Herslund and Lars Nyberg June 2000

I

The infrastructure of Bornholm is determined by its peripheral and insular location. This should also have an impact on the tourism industry. Lise Herslund and Lars Nyberg made an investigation on both Bornholm and the Øresund Region as tourist destinations in June 2000. They interviewed a lot of actors on both sides of Øresund with connections to the integration process between the two sides of the sound. This was done right before the opening of the bridge.

They find that the tourist mobility pattern is different between the Danish and Swedish side of the sound in two aspects. First, more Swedes go to Denmark for holiday than Danes to Sweden. Between Malmö and Copenhagen, the ratio between Danes and Swedes was 40-60 in 1999, which was a change from previous figures: 35-65. Most of these tourist movements are one-day-visits. Only 18 % of the visits were related to business.

Second, the dominant tourism flow in Skåne is domestic while it is international in the Copenhagen area. About 80 % of the income of the tourism industry originates from international tourism. In Skåne, business tourism has a great part of the total income: 45 % (Forum 1998). Totally, Copenhagen area has 60 % of the income of the whole Øresund Region (Forum 1998).

The tourists who visit Bornholm are coming from Denmark (52 %), Germany (31 %) and Sweden (14 %). Most of them are coming from the regional market. The Danes come from the wider capital region (60 %), the Swedes come from Skåne (70 %) and most Germans come from Mecklenburg, Schleswig-Holstein, Berlin and Hamburg (Rassing 2000).

Since 1996, according to the survey data, the number of tourists to Bornholm has been around half a million. Half of the tourists have been visiting the island more than 5 times and 30 % for the first time. Most of the visitors are grown up couple or families with children under 15. The stay has in average a duration of 8 days (1999 for July and August). It has decreased from almost 11 days in 1996 (Rassing 2000). Herslund & Nyberg also verify the findings of Lingvall that most of the tourists find their way to Bornholm by own experience or by information from relatives and friends, not by marketing efforts from Bornholm. They look for nature, beaches, landscape and atmosphere.

Herslund & Nyberg identify a number of organisations for co-operation over the sound. *Øresund Identity Network* is established by the Swedish and Danish government in order to market the region. It has a clear public structure with a deep anchoring on top political level but also on regional administrative level and there are also 25 companies which have joined the

organisation on local level. *Øresundsbroen* is a marketing company owned by the consortium that is building the bridge. They market the bridge both on TV and in news papers. Probably the most important organisation is, however, *Øresund Forum*. It is a co-operation between tourism companies in the Øresund Region.

The participants of Forum have, however, their main activities outside the co-operation. *Wonderful Copenhagen* is the big actor on the Danish side with focus on business and cruising tourists. According to the company, Copenhagen will design the tourism profile of the Øresund Region. What is good for Copenhagen is good for the whole region (Andersen 2000).

On the Swedish side, *Skånes Turistråd* is the main actor. Summer holidays are the main focus for them but they look forward to more tourists from Denmark after the opening of the bridge (ST 2000). They do not see the co-operation with Denmark as anything more than a dialogue. It is difficult to adjust in the short term perspective to something quite different.

Destination Bornholm is looking forward to the opening of the bridge and the fast ferry. They expect more short visits (day tours especially). The destination wants to co-operate primarily with Wonderful Copenhagen. The problem for Destination Bornholm is that the tourism industry on the island is not prepared for short stay visitors (as a result of the fast ferry and the bridge) or business tourists (as a result of the co-operation with Wonderful Copenhagen). The integration of the Øresund Region can also be seen as a threat since Copenhagen will be even more attractive for skilled persons after the opening of the bridge. There is also a fear that tourists from Denmark stay in Skåne and do not go further to Bornholm. The Destination looks upon Skåne as a competitor. Transforming Bornholm to a multi-destination is not a good strategy, according to Destination Bornholm. Bornholm is a place where people want to rest and enjoy themselves, not go further to other places.

II

Herslund and Nyberg describe a situation where a lot of actors are ready to meet the change but they do not fully know or understand what the change is about. Politicians and leading persons within existing network for the industry on each side of Øresund know that they have to act. But integration is a result of the input into the integration process. And most of these actors have neither the will nor the ability to change conditions in order to facilitate the integration process, not to talk about enforcing the process. They hope instead that this will be a win-win game by the very fact that a bridge is opened.

Bornholm has, according to the interviews, not recognized Skåne as a partner. It is more seen as a competitor. Copenhagen has been seen as the partner. At the end of this process before the opening of the bridge, Bornholmian politicians noticed the fact that they are on both sides of the bridge. Denmark in general is not very interested in the bridge but for

Bornholm it seems to be essential. In that respect, they have the same interests as politicians from Skåne.

Somewhere back in their heads, tourism planners on Bornholm, however, see Skåne as a potential competitor. They fear that the Danes who are coming over the bridge will stop in Skåne and not go further to Bornholm.

III

Rassing & Lundtorp (1999) describe the competitive situation on Bornholm between different actors within the tourism industry (primarily accommodation). The conclusion is that hotels have almost a monopoly on business tourists while the smaller hotels and pensions have their own market segments with focus upon holiday-makers. Other forms of accommodation centres compete to a certain degree with each other but not in a significant manner.

Networking on Bornholm is according to that not enforced by competition among actors on the island but from outside. A capacity, adapted to the demand of today, makes networking not feel very important. A change in demand for accommodation will according to that also cause a change in the need of networking.

6. *The Regional Plan of Bornholm* Bornholms Amt April 2001

The politicians at the Council of Bornholm – Bornholms Amt – started early to plan for the new situation (Debat...Regionplan 2001). In order to do so, the Council invited a broad array of representatives for different interests on the island. The objectives for that group was to come up with ideas for the new regional plan. In that process, focus was on *transport, living, education, Skåne, industry* and *tourism*. The result of that broad discussion was above all an acceptance for Council of Bornholm to be member of the Øresund Committee. But it also had an impact on the forming of the regional plan.

I

What is then the role of the public authorities and politicians? One way to get an understanding of that is to look at the official document which declares the objectives of the tourism policy of the county (The Amt Council of Bornholm): The Region Plan.

The Region Plan of Bornholm has a special chapter on tourism. The objectives with tourism are (p 55):

- a. Tourism shall have good development possibilities
- b. It must be attractive to spend a holiday on Bornholm
- c. The Amt Council will support tourism which is beneficial for the island from an economic and qualitative point of view

The Amt Council will encourage a quality tourism that takes its point of departure in the natural and qualitative environment of the island. At the same time, tourism must not depreciate these qualities for the local residents. The plan sums up these statements by saying, that mass-tourism is not of interest for Bornholm. Tourism should increase employment and give value added to commercial life but not deteriorate nature and culture.

The plan concludes, that since the first plan was made in 1978, the number of tourists has never increased per day the number of residents on Bornholm (48 000 in 1978 and 44 000 in 2000). The Amt Council finds it desirable not to exceed that number in the future either.

Direct activities where the public (the Amt Council) is ready to interfere with the industry are the following:

- Secure necessary facilities for harbours, golf courses paths and parking lots
- Support existing holiday facilities and promote the establishing of new ones
- Contribute to a comprehensive marketing of Bornholm
- Promote initiatives for alternative use of empty houses

The first activity is a normal public activity within the frames of land use planning. It has nothing to do with public interference with the tourism industry other than what is normal from a planning point of view for all types of commercial activity.

The second activity is matter of semantics. What does the words *support* and *promote* mean in this context? It is anyway not frequent public words in other commercial activity contexts. If it means financial support in one or other way, it is a clear interference from the public with the tourist industry. If support is given, it probably is based on the presumption that tourism generates employment and by that also tax revenue.

The third activity has a similar semantic problem. What does *contribute* mean? If it is financial support, this is also a clear interference with the industry. If support is given, it probably is based on the presumption that marketing of Destination Bornholm is also marketing of the Amt of Bornholm and by that contributing to attracting other types of business to the island.

The last activity has more with farm tourism to do and lies with the frames of normal public land use planning.

II

According to the regional plan of Bornholm, the destination is target for some public interference and steering. The comprehensive marketing is obviously of public interest. On Bornholm, tourism is important and is regarded as a potential development factor (as it often is, especially in peripheries).

Another cause to this public interest may also be the short-sightedness which characterises the tourism industry. It is difficult to store tourists and use them when they are needed. One season is followed by another season and the possibility to move results from the fat years to the poor years is negligible in many cases. The structure is hence fragile and since the tourism industry has fiscal interests for the politicians, they want a stable tourism industry structure.

III

The question of what a destination is, has to be answered in the light of these facts. The destination is a mix of many things and by that it is very difficult to manage, which Destination Bornholm has expressed in Hartl's investigation. A deeper understanding of the mechanisms steering the development of a destination has to be done before any recommendations can be made on how to manage the destination.

It is interesting to notice the ambiguity in this matter, revealed in the region plan with the following remark: "Tourism is the third biggest industry on Bornholm and therefore the Amt Council is well disposed towards tourism industry, which, however, finds that the marketing efforts should rest on the industry itself".

2. *Networking on Bornholm* - a study 2001 by Don Getz and Tage Petersen.

I

An attempt to achieve a deeper understanding of the underlying conditions for the tourism industry was taken by Don Getz and Tage Petersen through an interview study on Bornholm in May 2001. Representatives from the industry and from the public sector were asked about their experience of networking within the tourism industry.

Just one *hotel-owner* is interviewed (not anyone of those who were interviewed by Framke). This hotel-owner runs an all-year-round hotel and he has a winter season based on business tourists and a summer season based on holiday makers. The hotel is a rather big hotel and can be seen as a mix, between all-year-round hotels with business tourists and seasonal hotels with holidaymakers, not found in Framke's interviews.

Getz and Petersen interview a *farm tourist* entrepreneur, a category Framke did not interview at all. The farmer says, that the idea of farm tourism was developed by LUIC, which is part of the Farmer Movement in Denmark and with subsidies from public money (including EU-funding). That initiative from "above" was replaced by a horizontal networking. It consisted of a co-operation between the twelve established (as a result of the initiative) farm tourist entrepreneurs on the island. They now support each other and function in a more and more informal network where Internet has a steadily increasing importance for direct booking and marketing.

Getz and Petersen also interviewed a *tourist bureau* (not interviewed by Framke). More than 80 % of customers of the bureau come from Germany. The customers are normally renting a summerhouse and the bureau is organising that. Framke found that almost 90 % of the customers of the tourist bureaus he interviewed, came from Germany. That does not mean that 80-90 % of the summerhouse guests on Bornholm are Germans. The Danes do not book their summerhouses in the same way as the Germans and a lot of the summerhouses are owned by Danes.

The rules for booking summerhouses are quite distinguished, according to the interviewed owner of the tourist bureau. He does not accept that owners of the summerhouses use more than one agent for booking and that is obviously accepted by the other agents on the island. The owners are of course free to market themselves but if they want help, they have to stick to just one agent at a time. He neither makes an appointment with a house owner who is also booking directly. The owner also tells that a majority of Scandinavians use on-line booking on computer while a majority of the Germans want to book by catalogues and phone-calls.

During the peak season (last week in June to third week in August), there are no free summerhouses. It is impossible for "walk-ins" to find a house. They are referred to hotels.

The tourists want better and better houses, according to the interviewed owner. A satellite TV is for instance obligatory. Ten years back, there were many people who came back to the same house for twenty to thirty years. Now, that kind of people are becoming more and more rare and even if they come year after year, they are not always staying in the same house although perhaps in the same area. Repeat visitors today may come every second or every third year back.

The bureaus on the island have some informal meetings with each other but nothing formal. They have made some marketing through a national organisation (Ferienhäuser). The major challenge for the interviewed bureau owner is to let the tourist product be more developed to be better for young people (young adults). Currently, it is for families with young children and for “empty nesters”. In order to achieve that, it is necessary to organise entertainment like discos, meeting points, or active holidays.

When Lingvall made his study on Bornholm, the transport development had not started. During Franke’s investigation, the decisions had been made on Store Bælt-bridge and the Öresund-bridge. It was also under discussion to install a fast-ferry. Now, the bridges are built and the fast-ferry runs for the second season. Getz and Peterson have an interview with the new director of *Bornholm Trafikken* and he really has news to bring.

He says, that he started a year ago and the organisation and that time was completely different to what it is today. The need for change was the customers. The production side of things was there but without recognition of the customers’ need. Now, he says, the production side wants to be a mirror of the customers’ demands and requirements of the company. No passenger must be trapped where someone says that this is not his responsibility.

Only 10 % of the tickets are sold by travel agents but the company has discussed service outlets both in Copenhagen and on Bornholm. They have also discussed co-operation with the post offices. The co-operation with the hotels has not been so good, he thinks. The hotels have empty beds and they want Bornholm Trafikken to come with more passengers. He argues, he says, that they have to come up with some sort of strategy.

He has quite determined opinions on public policy for tourism. The main problem, he says, is that there are too many politicians sitting on everybody and that the tourism industry expects the politicians to solve all problems. The industry has to tell the politicians what they want and the bodies responsible for developing tourism strategies should be non-governmental and be given a more dominant role, especially Destination Bornholm.

He finds conditions for industries - especially for big scale industries - poor on the island, mostly because of the problematic transport situation. Tourism has a clear advantage and he thinks that more entrepreneurs should engage in

tourism. He has told the producer of fish for export, that he should put his energy on tourism instead. More focus is needed on industry and from a political viewpoint, tourism should be given all attention it deserves and clearly at present the attention is minimal. The players (hotels, camp sites etc) need to do much more than they do today but they are probably too small.

The timetable has to be modified, he says, and the company has started meetings with the bus transport organiser on Bornholm. It is a new thing to have these meetings, he says. There is a need for more meetings of that kind. He also organises meetings with the air company. Bornholm Trafikken has taken 28 % of the air market, he claims, but he does not want to step on their toes since they both companies are essential for the development of the island.

The last year (2000) has given them a tremendous increase in the amount of travellers. June 2001 was 30 % up on June last year and that was about 40 000 passengers more (173 000 instead of 133 000 last year). It is of course because of the bridge and the fast ferry but also the ferry was here last year (although the bridge was not in June).

Getz and Petersen also interviewed *TIC*, a centre for technical (not only technological) information to the industry, founded by public money (78 % from the government and the rest from the country). It was established in Denmark in 1970 and on Bornholm (the last place to be established on) in 1981. Tourism industry became a target for their activities only in 1999. TIC offers courses in quality management and strategic management plus environmental control.

Courses are initially meant for managers and leaders and the respondent told a couple of example, where the courses have changed the direction of the management of the participating companies. One hotel owner had two hotels he run in the same way. After the course, he realised that it was better to run each with its own concept. Another hotel owner found that TIC gave him the first possibility to think and do something about the future.

II

The picture of Bornholm as a destination becomes a bit clearer with the results from the investigation of Getz and Petersen. There are hotels, for example, which mix the concepts of all-year-round hotels with business tourists and seasonal hotels with holidaymakers.

Farm tourism has its own type of development. It was initiated by public initiatives and money and end up as a good example of horizontal networking with clear efforts to create some kind of vertical networking too.

Bornholms Trafikken seems to have taken the lead in vertical networking by introducing new strategies, new policies and a new management. The company is also keen to enlarge its horizontal networking by co-operations

and meetings with other actors within the transport and booking sector on Bornholm. According to the director of the company, this is something new on Bornholm.

The new transport situation (bridges and fast ferry) has meant in some ways new travel and accommodation patterns of the tourists. The results of these changes are not obvious yet but the changes seem to challenge parts of the tourism industry. Especially the accommodation occupancy rate has not followed the increased number of passengers with the ferries to the island. More visitors to friends and relatives may have been the result of easier transport facilities from Copenhagen and the rest of Denmark. But there may also have been more day visitors since the possibility for that has at last become available for people outside Bornholm. Previously, the timetable just allowed a two-hour-stay on the island for those who did not overnight.

III

A lot of criticism has been aired from the regional level about the lack of skill and strategies of the tourism industry on Bornholm. Several attempts have been made from regional actors to do something about that situation but in most cases, the entrepreneurs are reluctant to change their approach to courses and education, due to different reasons. These reasons are expressed as lack of confidence in the course operators, lack of time, lack of need of more knowledge or just a tradition not to attend something coming from top to bottom.

Arguments have been put forward to separate the tourism industry from public influence and interference. It is difficult to measure the strength of these arguments with respect to a common interest from the industry.

A broader use of networks on the island seems to be necessary to develop the tourist industry on Bornholm. But this use of networks also seems to be necessary in order to meet new travel patterns from the tourists. If the tourists visit relatives and friends to a greater extent than before, the service sector has to accommodate to the needs of these people.

Day visits give probably another pattern for expenditures. But day trips may in the statistics be mixed up with caravan tours where people sleep in their own wagons. These overnight stops may be done in the North Scandinavian way of doing it: stop at a parking lot or on private ground. That is forbidden in Denmark so in some way the problem has to be solved.

3. *Tourism industry on Bornholm - a study 2001 by Dimitry Ioannides and Tage Petersen.*

I

An even deeper attempt to discover tourism business patterns on Bornholm was made by Dimitri Joannides and Tage Petersen in June 2001. They interviewed 4 hotels (2 all-year-round and 2 seasonal), 2 pensions, 4 holiday establishments, 8 farm tourism entrepreneurs, 2 summerhouse intermediary agents, 1 bus company, 1 restaurant, 1 marine centre, 1 golf course, 1 hoarse riding centre, 1 tropic centre, 1 smokehouse, 1 glass blower, 1 goldsmith, 1 chocolate producer (30 in total). Two of the respondents (hotels) have been interviewed earlier (by Framke).

The interviews with hotels and the pensions do not add something to the picture formed by earlier interviews, except the fact that one of the hotels is part of a national hotel chain. By that, two hotels on the island (among the interviewed) are members of hotel chains which make them fit in better with Poon`s (1993) view of vertical networking. The farm tourism entrepreneurs are all members of a marketing association with connections to national marketing of farm tourism. That is the normal case for farm tourism. Marketing of farm tourism is regarded as a concern for the whole farm industry at the national level in order to promote agriculture in general for political reasons (Nilsson 1998). A local co-operation can, in that respect, both be seen as a horizontal networking but also – and much more – as a diagonal networking with initiatives taken from above.

When the respondents try to promote themselves to the interviewer by telling how attractive their business is for tourists, they present a wide array of attractive items: galleries (5), nature (5), animals (5), Hammershus (4), smokehouses (3), shopping (3), boat excursions (3), art (3), close to a golf course (2), beach (2), riding (2), fauna, historic sights, restaurants (2), tennis courts, swimming hall, glass blowers, fishing, excursions, wildlife, gift shops, candy stores, exhibitions.

According to Lingvall`s findings, culture and nature attractions are on top but also activities connected to the special atmosphere of Bornholm like smokehouses, glass blowers and culture heritage like Hammershus. The amount of animals offered as attraction is probably due to the fairly high rate of farm tourism entrepreneurs among the respondents.

The tourist market is quite stable. A ranking of the most important market for the respondents gave this result: Germany (7) Denmark (6) and Sweden (5). Even if Germany is the most important market for some of the biggest actors on Bornholm (summer house renting and seasonal hotels), the domestic market and Sweden is of importance. Indicators from other sources (Destination Bornholm) say that the numbers of Norwegian and Polish tourists are steadily increasing.

The question of the seasonality problem is of course obvious on Bornholm. But out of 30 interviewed, 12 have open all-year-round. Those open all year were spread among all kinds of companies (from accommodation to shops). Bornholm is not totally dead in winter.

The main offer is accommodation (12). The biggest establishment has 48 rooms and the next has 31 rooms. Then it falls to 10 rooms. Four establishments have flats, from six to 2 flats. Five companies are just “offering guest accommodation facilities”.

Many have “repeat visitors” (4) and some stress that they have “empty nesters” (3) and “families with children” (3). Bus tours, conferences and groups are also mentioned. Close to accommodation offers are two bureaus intermediating summer houses to tourists.

The rest contains of a transportation company, two restaurants (including a smokehouse) and five “special interests”.

If we look at the vertical networking dimension, there are a lot of the entrepreneurs who use Internet:

- E-mail (87 %)
- Internet-based advertising (83 %)
- book-keeping (50 %)
- storing customer data (40 %)
- home banking (23 %)
- No computer (6 %, e.g. 2 companies)

Obviously, IT is used for marketing to a great extent. On the other hand, it does not seem to have made the intermediary agents unnecessary.

In order to understand better how the companies develop the horizontal networking, some data which indicate co-operation were checked:

Courses from TIC or *Erhvervsskolen* (higher vocational education school) were attended by 17 % of the companies. It was courses in marketing, IT (3), personal development, quality management, economy, service, culture, and marketing.

One of the participants in these courses was negative. The rest had only positive remarks: “pleased by the benefit of the courses”, “improved administration considerably”, “use our resources better”, “inspires to new steps”.

Co-operation with other actors on Bornholm or in Denmark was quite frequent: Horesta (2), Farmer associations (3), “Use local farmers for the restaurant”(2), golf associations (2).

The way the companies use their co-operative partners was:

marketing (70 %)
over flow booking (67 %)
package tours (23 %)
booking (20 %)
no co-operation (3 %, i.e. 1 company)

Very few of the entrepreneurs had their children participating in the business (3). Just two could think of handing the company over to the children.

Other types of comments:

“Benefits from the fast ferry and the bridge”

“Problems with authority regulations for signs”

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