Report 10/97

Survey of Visitors to Bornholm

January 1996 - December 1996

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Preface

In the latter part of 1994, the Danish Research Council for the Social Sciences funded the establishment of a Unit for Tourism Research at Bornholms Forskningscenter. Tourism is a formidable economic activity within the European Union and in line with this, the focus of the research programme is the investigation of tourism in the peripheral areas of Europe. Many peripheral areas have strong natural environments which make them attractive to tourists, particularly in the light of the public's concern with environmental issues. Experience has shown that tourism has been able to safeguard and create jobs in marginal regions which have little prospect of attracting alternative industries.

The objectives of the Unit are to study:

- Patterns of demand for tourism in peripheral areas;
- The behaviour and structure of the tourism industry;
- The social aspects and consequences of tourism;
- Tourism as a strategy for the development of peripheral areas;
- The integration of relevant theories and development in tourism;
- The sustainable development of communities in terms of economic, environmental and social factors.

The programme is managed by Henrik Christoffersen, AKF - Institute of Local Government Studies, Svend Lundtorp, Bornholms Forskningscenter and Stephen Wanhill, Bournemouth University and Bornholms Forskningscenter; Stephen Wanhill being the researcher responsible for the tourism programme. In addition, the Research Council has approved other partners to undertake projects within the Unit for Tourism Research. Included with the institutions already mentioned are the Danish Institute of Border Region Studies, the Danish Forest and Landscape Research Institute and particular researchers, Anne-Mette Hjalager, Advance/1, Wolfgang Framke, Copenhagen Business School and Jan Mattsson, University of Roskilde.

The passenger survey carried out by the research centre is, to our knowledge, the largest of its kind carried out in Denmark. The survey will continue until the summer of 1999.

Svend Lundtorp
Chief of Research
August 1997

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Survey Design

Introduction

Leisure tourism on Bornholm is more than a century old, having its early beginnings in the 1860s and gaining momentum after the establishment of regular summer steamship links to the island from Copenhagen, Sweden and Germany towards the end of the last century. These links established the pattern of visitor flows that are present to this day, in that the core markets for the tourist product of the island are still domestic (internal) visitors from the rest of Denmark and overseas visitors from Germany, Sweden and, to a lesser extent, Norway.

Apart from records of overnight stays and the number of ferry and air passengers kept by Danmarks Statistik, and evidence from national surveys commissioned by Danmarks Turistråd, there has been very little market research concerning visitors to the island. Earlier studies have been:

- *Tourist Analysis Bornholm 1969*: self-completion returnable postcard survey undertaken from 30 March to 4 October 1969, to obtain information on visitor profiles and levels of satisfaction (Bornholms Turistforening, 1970). The sample size achieved was 22 035;
- *Bornholm as a Holiday Destination for German Tourists*: a source market survey carried out during the months of June and July 1993 (FORSA, 1993). The sample size was 6 043 German people above 14 years of age;
- *Summer House Project Bornholm*: a survey of 2 047 summer house users with the primary purpose of assessing the quality of summer house provision (Hasløv and Kjærsgaard I/S, 1995).

The current survey, undertaken by the Unit for Tourism Research, Bornholms Forskningscenter, is part of a wider and much larger investigation into the role of Tourism in the Peripheral Areas of Europe. In this instance, the survey is being conducted in order to assess the nature of tourism demand in peripheral areas, using Bornholm as a case example for the purposes of fieldwork.

Survey Objectives

The overall objective was to provide a comprehensive description of visitors to Bornholm that was in keeping with the standard analysis of destination surveys. Enclosed as Appendix I is the questionnaire concerning sea departures in the first and second quarter of 1996. Enclosed as Appendix II is the questionnaire concerning the third and fourth quarter of 1996. As can be seen the questionnaires were slightly altered as per 1 July 1996, but still leaving the possibility to compare data across the years. The questionnaires were made up in four different languages (Danish, Swedish, German and English).

Survey Methodology

It was agreed that the survey should run for a complete year, from 1 July 1995 to 30 June 1999. Interviewing arrangements were structured so as to guarantee that, at a minimum, every day of the week and each week in any one month for every quarter of the year was surveyed. This was done so as to ensure that no systematic bias could arise in the quarterly reporting of information. Contacts would only be adults, using as the definition 16 years of age and upwards.

Interviewing was carried out at the main points of exit and departure so that data collection took place mostly on BornholmsTrafikken’s ferry departures to Copenhagen, Ystad (Sweden) and Neu Mukran (Germany) and DFO’s to Saßnitz (Germany), and on Maersk Air’s route between Bornholm and Copenhagen as well as the air-departures during the main season to Germany. The length of the questionnaire and terminal arrangements made it necessary for the interviewers to conduct the survey on the ferries and the aircraft. Cost dictated that respondents would be introduced to the questionnaire and thereafter complete it themselves, with interviewers on hand to deal with any issues that might arise.

The limited number of source markets for Bornholm indicated that the working sample size need not be large. But the paucity of information about visitors to the island commended a strategy of over-sampling so as to ensure results that were robust. A pilot questionnaire was run among tourists visiting the island by ferry in early June with a sample of 50 respondents. A target of 3 000 visitor contacts (departures) per year was set with a screen questionnaire to filter out local residents. It was anticipated that the chosen method of interviewing would lead to some wastage in the form of unusable returns, but this could be accommodated within the target.

The composition of the report covering the year 1996

The report is divided into two sections. The first section describes the visitors departing by ferry and aeroplane in the period January 1996 - December 1996. The questions were asked partly to assess whether the sample was representative of known characteristics of visitors from other sources and partly to be able to analyse the results by key variables. The Bornholm residents were filtered through a screening process, but they were asked some supplementary questions. The findings of these are described in section two.

The year 1996

This report covers the tourists and the residents mainly leaving Bornholm by ferry, and for the first six months also those departing by aeroplane in the period 1 January 1996 - 31 December 1996. The frequency tables in the report are based on the statistics shown in table A.

Table A. Sample

	1st Qtr 1996		2nd Qtr 1996		3rd Qtr 1996		4th Qtr 1996		All Year	
	Base	%	Base	%	Base	%	Base	%	Base	%
Visitors	372	39	771	42	1.188	85	124	26	2.455	59
Residents	573	61	562	58	208	15	363	75	1.706	41
Total	945	100	1.333	100	1.396	100	487	100	4.161	100

Overall, some 88% of the sample were departing by sea, leaving the remainder departing by air. In the fourth quarter of 1996 no tourists departing by air were interviewed. In 1996 some 51% of contacts were male and 49% female.

This report is divided into two sections. In the first section of the report the tabulations are made available in the order suggested by the objectives embedded in the layout of the questionnaire, save that behavioural and attitudinal questions are linked together by topic;

accommodation, visits to attractions, activities pursued by visitors and mode of transport used. These are then followed by expenditure data and the final section deals with overall impressions of Bornholm as a visitor destination, together with the likelihood of returning to the island. It will be appreciated that in a comprehensive survey of this kind, there are a myriad of ways in which to present the data and it is only possible to show the highlights of the findings in this report.

Section two of the report presents the findings from the Bornholm residents. As noted previously the residents were filtered through a screening process, but were asked some supplementary questions.

In both section one and two the tables are laid out in a manner that shows all cell entries as percentages, unless otherwise specified. The basis on which these percentages are calculated are the number of respondents answering that question, or questions in the case of cross-tabulations. The number of respondents is shown in bold type at the top of each table. That number for a given category may change from table to table due to incomplete answers.

Acknowledgements

It would have been impossible to conduct this survey without the help and effort of many people. The ferry companies, BornholmsTrafikken and DFO have been most helpful by supplying free transport for the interviewers as well as by allowing access to the terminal areas in order to interview passengers. Interviewing at the airport and on board the aircraft would not have been possible without the permission and help of the airport authorities at Bornholm and Copenhagen and Maersk Air.

The planning and design of the questionnaire was carried out by Henrik Christoffersen, Ann. Hartl-Nielsen, Nils Finn Munch-Petersen and Stephen Wanhill, with the kind help and support of several colleagues at the Research Centre. During the first year, six interviewers were involved in collecting data and the data processing. Charlotte R. Rassing was responsible for the data processing, mainly the control of the database and analyses work. Charlotte R. Rassing took care also of the overall planning of schedules, contact with transport companies and other administrative duties in regard to the survey.

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1. Profile and Characteristics of Visitors

Profile questions were asked to distinguish between day and stay visitors (domestic and overseas), establish visitors' country of origin, whether they had been to Bornholm before, number of visits, last visit, purpose of visit, party composition, party size, length of stay and socio-economic characteristics such as occupation, age, education and household income.

Findings

1.1. Key Markets

The key markets for Bornholm in all four quarters are Denmark, Germany and Sweden (Table 1.1), which are linked to the island by proximity and, in the main, the sea transport network, because, unlike other island destinations, there have been no major developments of air routes and charter flights. In the first quarter of 1996 more than two thirds of the visitors were from Denmark. This was caused by the great number of VFR visitors during Christmas time. In the main season covered in the third quarter some 38% of the tourists were Danes while 46% were from Germany.

1.2. Type of Visit

Some 72% of visitors interviewed had been to Bornholm before (Table 1.2). As derived from the quarterly reports, the greater part of the repeat visitors are from Denmark. Clearly, Bornholm has a regular repeat following, with strong loyalty to the product. This fact is illustrated in more detail in Tables 1.3 and 1.4. Throughout 1996 some 46% of the tourists had been to Bornholm more than 5 times before. The share increases to 69% in the first quarter.

1.3. Purpose of Visit

The dominant purpose of visit to Bornholm in the second, third and fourth quarter of 1996 is for holidays (Table 1.5). Overall, 59% of visitors gave the purpose of their trip to Bornholm as 'Holiday'. In the first quarter the main purpose was business or other work.

1.4. Party Composition

Visitors were asked about who they were travelling with (Table 1.6) and, apart from those on a day trip who were most likely to be travelling alone, adult couples and families with young children formed the core of the market. This kept average party size to below 3 persons (Table 1.7). There are some differences in the average party size in the four quarters. The average party size is higher during the summer because of more family holiday groups. There is some discontinuity between the answers to party composition and recorded personal party size in the tables. This arises from the fact that party size has an economic connotation: individuals could be travelling with someone, yet economically just paying for themselves.

1.5. Length of Stay

Length of stay is shown in Table 1.8. The visitors in the third quarter of 1996 stayed almost 6 days longer than the visitors in the first quarter of 1996. The absence of a short break market of substance in the third quarter of 1996 is reflected in an average length of stay of 10.78 days. However, the absence of short breaks during this period does not come as a surprise, since this period covers most of the main holiday season. The relatively short average of stay in the first quarter of 1996 is caused by the many day visitors. In the first quarter of 1996 some 21% of the tourists were day visitors combined with 6% in the second quarter, 1% in the third quarter and 12% in the fourth quarter.

1.6. Socio-economic Characteristics

Occupational characteristics of visitors in the period covered are principally professional, managerial and administrative, skilled wage earners and retired persons of similar background (Tables 1.9 and 1.10). The age ranges mirror the results in respect of party composition, with couples at the top and bottom of the age spectrum and family groups in the middle (Table 1.12). Comparisons regarding income should be made with caution due to different taxation systems, leaving different levels of disposable income.

Table 1.1. Visitors by Country of Residence *Percentages*

Country Base: All Visitors	1st Qtr 1996 371	2nd Qtr 1996 771	3rd Qtr 1996 1155	4th Qtr 1996 124	All Year 2421
Denmark	72	54	38	53	49
Sweden	14	10	10	12	11
Germany	10	32	46	32	35
Others	3	4	6	2	5

Table 1.2. Visitors by Type of Visit *Percentages*

Visit Base: All Visitors	1st Qtr 1996 371	2nd Qtr 1996 771	3rd Qtr 1996 1154	4th Qtr 1996 124	All Year 2420
First	6	27	39	14	29
Repeat	94	73	62	86	72

Table 1.3. Visitors by Number of Previous Visits *Percentages*

Previous Visits Base: Repeat Visit	1st Qtr 1996 210	2nd Qtr 1996 333	3rd Qtr 1996 645	4th Qtr 1996 96	All Year 1284
1	10	17	28	15	21
2	6	16	16	9	14
3	6	9	10	3	9
4	6	5	8	4	7
5	4	6	5	3	5
6-10	21	16	11	11	14
11-20	17	11	4	16	9
21-50	15	11	3	10	8
More than 50	16	9	16	28	15

Table 1.4. Visitors by Last Visit *Percentages*

Last Visit Base: Repeat Visit	1st Qtr 1996 337	2nd Qtr 1996 541	3rd Qtr 1996 696	4th Qtr 1996 103	All Year 1677
Earlier this year	32	27	13	67	25
Last year	49	33	29	15	33
Within last 2 years	9	12	12	6	11
Within last 5 years	6	10	15	4	11
More than 5 year	5	18	30	9	20

Percentages

Table 1.5. Visitors by Purpose

Purpose Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Business or other work	34	11	2	3	10
Holiday	15	50	80	38	59
Holiday/VFR	22	17	11	17	15
VFR solely	22	15	3	21	11
Sporting event	0	1	1	2	1
Education	1	1	1	9	1
Other (including above combinations)	4	5	2	9	4

Table 1.6. Visitors by Party Composition *Percentages*

Party Composition Base: All Visitors	1st Qtr 1996 360	2nd Qtr 1996 755	3rd Qtr 1996 1149	4th Qtr 1996 121	All Year 2385
Travelling alone	44	21	7	21	18
Husband/wife/partners only	26	40	34	30	34
Family group: children under 15	11	13	31	17	22
Family group: children grown up	4	5	6	7	5
Family relations/friends	3	5	5	10	5
Friend/friends	6	11	9	9	9
School/club/association/course	0	0	*	4	*
Other	6	5	8	4	6

Note: 1. * means less than 0.5%.

Table 1.7. Visitors by Party Size *Percentages*

Party Size Base: All Visitors	1st Qtr 1996 415	2nd Qtr 1996 415	3rd Qtr 1996 1155	4th Qtr 1996 123	All Year 2108
1	47	48	12	30	27
2	33	33	40	38	37
3	10	9	15	7	12
4	5	6	22	11	15
5	1	2	6	7	4
6-10	2	1	5	4	4
More than 10	1	1	1	3	1
Average (persons)	2.17	2.48	2.94	2.67	2.68

Table 1.8. Visitors by Length of Stay *Percentages*

Period Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1142	4th Qtr 1996 117	All Year 2377
Day visit	21	6	1	12	6
Short stay [1]	32	23	7	23	17
Up to one week	32	42	23	27	31
One - two weeks	11	23	42	29	31
Two - three weeks	1	4	21	3	12
More than three weeks	2	1	6	6	4
Average (days)	5.15	7.01	10.78	9.88	8.68

Note: 1. Up to three days.

Table 1.9. Respondents' Occupation *Percentages*

Occupation Base: All Visitors	1st Qtr 1996 314	2nd Qtr 1996 657	3rd Qtr 1996 1025	4th Qtr 1996 103	All Year 2099
Self-employed	3	5	6	7	5
Professional, managerial and administrative	44	42	48	36	45
Clerical	4	3	3	6	3
Skilled wage earner	19	15	16	20	16
Unskilled wage earner	5	6	6	4	6
Assisting spouse	0	*	*	0	*
Employment not specified	1	2	0	0	1
Retired	14	20	14	11	16
Student	9	6	5	13	6
Economically inactive[1]	2	1	2	3	2

Notes: 1. Includes unemployed and home workers.
2. * means less than 0.5%

Table 1.10. Spouses' Occupation *Percentages*

Occupation Base: All Visitors	1st Qtr 1995 176	2nd Qtr 1995 444	3rd Qtr 1996 380	4th Qtr 1996 62	All Year 1062
Self-employed	5	6	4	7	5
Professional, managerial and administrative	47	40	43	38	42
Clerical	6	3	5	2	4
Skilled wage earner	14	17	21	21	18
Unskilled wage earner	4	5	7	7	6
Assisting spouse	0	1	*	0	1
Employment not specified	1	1	0	0	1
Retired	18	19	11	10	15
Student	2	3	3	10	3
Economically inactive[1]	4	6	7	8	6

Notes: 1. Includes unemployed and home workers.
2. * means less than 0.5%

Table 1.11. Respondents' Education *Percentages*

Education Base: All Visitors	1st Qtr 1996 307	2nd Qtr 1996 625	3rd Qtr 1996 986	4th Qtr 1996 98	All Year 2016
Up to 9 years	16	20	20	16	19
9 - 12 years	22	21	23	20	22
12 years + vocational	35	28	27	33	29
12 years + academic	27	30	31	31	30

Table 1.12. Respondents' Age *Percentages*

Age Base: All Visitors	1st Qtr 1995 338	2nd Qtr 1995 726	3rd Qtr 1996 1072	4th Qtr 1996 109	All Year 2245
16 - 24 years	11	8	6	14	7
25 - 34 years	22	14	15	20	16
35 - 49 years	30	31	44	26	37
50 - 59 years	20	24	20	19	21
60 - 69 years	12	16	11	19	13
Over 69 years	4	7	4	2	5

Table 1.13. Visitors' Gross Family Income per Annum *Percentages*

Family Income Base: All Visitors	1st Qtr 1996 313	2nd Qtr 1996 618	3rd Qtr 1996 966	4th Qtr 1996 96	All Year 1993
Less than 200,000 DKK	27	22	19	41	22
200,000 - 400,000 DKK	41	47	47	32	45
400,000 - 700,000 DKK	27	25	28	25	27
Greater than 700,000 DKK	6	6	6	2	6

2. Awareness and influences on the decision to visit Bornholm

Visitors were asked about the extent of their awareness of Bornholm and how they found out about the island. An important feature of this is school travel (lejrskole), which was made an integral part of the Danish school system in 1953. The contrasting geography of the island in relation to the rest of Denmark has made it a notable destination for school trips, hence visitors were first asked whether they had been to the island when they were children. Questions were then put to ascertain the visitors information sources concerning Bornholm and how significant were the different aspects of Bornholm in influencing their decision to take their holiday on the island.

Findings

2.1. Visit to Bornholm as a Child

The base for the enquiry as to whether visitors had been to Bornholm as a child was those respondents who had been to the island before. The visitors in the first quarter of 1996 were most likely to have come to the island when they were children. This reflects the great number of Danish visitors (72%) in the first quarter. Overall, 33% of the visitors in 1996 had been to Bornholm as a child.

2.2. Source of Information

In asking holiday visitors how they found out about Bornholm, it is common with this type of question that those who have been before or cannot recall exact sources, will tend to attribute this knowledge to ‘Always known’. Add to this the importance of word-of-mouth recommendation from friends and relatives, and the majority of the 2 004 respondents are covered. This fact can be plainly seen in table 2.2. What then matters are the remaining means of communication, and here guide books and brochures are the most important items in 1996.

2.3. Attractiveness of Bornholm as a Destination

Using a Likert preference scale whereby a score of 4 stands for ‘Very important’ and 1 for ‘Unimportant’, holidaymakers were asked to rank the significance of the different components that make up the attractiveness of the Bornholm tourist product (Table 2.3). The highest scores were achieved by general features such as the nature, landscape and the atmosphere of the island, and the lowest in specific activities such as fishing and golf courses. This was true of all quarters. Other aspects of Bornholm that were considered ‘Very important’ by holidaymakers (apart from those having friends or relatives on the island) and which were solicited in an ‘open-ended’ question, were, in order of importance:

- Peaceful atmosphere, relaxing;
- The weather in terms of sun hours for Denmark as a whole;
- The appeal of being an island;
- Favourable position, easy to come to.

Table 2.1. Visited as a Child *Percentages*

As child Base: Repeat Visits	1st Qtr 1996 213	2nd Qtr 1996 343	3rd Qtr 1996 1088	4th Qtr 1996 100	All Year 1744
No	49	59	74	61	67
With family/friends	19	17	12	21	14
With school	17	14	9	9	11
With family/school	12	6	1	1	3
With club/association	1	2	1	1	1
With above combinations	2	2	5	7	4

Table 2.2. Finding Out about Bornholm *Percentages*

Information Source Base: Holidaymakers [1]	1st Qtr 1996 231	2nd Qtr 1996 642	3rd Qtr 1996 1056	4th Qtr 1996 75	All Year 2004
Always known	19	31	38	44	34
Newspaper/magazine ad.	4	5	8	8	7
Poster	1	3	3	5	3
Newspaper/magazine article	3	5	10	5	7
Travel agent	2	6	5	5	5
Club/association	*	2	2	7	2
Family/friends	11	32	49	31	39
Guide book/brochure	3	10	13	9	11
TV ad. or programme	2	4	5	3	4
Radio	*	*	1	1	1
Travel show/exhibition	1	1	1	1	1
Other	2	*	4	7	3

Notes: 1. Includes holidays only, holidays and VFR, and holidays plus other reasons for the visit.
2. Percentages can add up to more than 100% because of multiple choice.
3. * means less than 0.5%

Table 2.3. Aspects of Bornholm

Evaluation Base: Holidaymakers [1]	1st Qtr 1996 231		2nd Qtr 1996 642		3rd Qtr 1996 1056		4th Qtr 1996 75		All Year 2004	
	Score	Ranking	Score	Ranking	Score	Ranking	Score	Ranking	Score	Ranking
Beaches	3.08	5	2.80	7	2.96	5	2.77	6	2.92	5
Landscape	3.68	2	3.73	2	3.57	3	3.60	2	3.64	2
Cycle routes	2.59	9	2.41	9	2.53	9	2.36	9	2.49	9
Walking	3.07	6	2.95	5	2.68	7	2.87	5	2.82	6
Fishing towns	3.16	4	3.26	4	3.15	4	3.15	4	3.19	4
Nature	3.72	1	3.77	1	3.63	1	3.69	1	3.69	1
Golf courses	1.30	13	1.17	13	1.17	13	1.15	13	1.18	12
Fishing	1.66	12	1.41	12	1.33	12	1.54	12	1.40	11
Cultural history	3.00	7	2.82	6	2.72	6	2.70	8	2.78	7
Restaurants	2.44	10	2.39	10	2.32	11	2.16	11	2.35	10
Craft/art workers	2.75	8	2.74	8	2.60	8	2.75	7	2.67	8
Atmosphere	3.51	3	3.61	3	3.59	2	3.55	3	3.59	3
Variety of activities	2.22	11	2.31	11	2.42	10	2.24	10	2.35	10

Notes: 1. Includes holidays only, holidays and VFR, and holidays plus other reasons for the visit.
2. The range was ‘Very Important’=4 to ‘Unimportant’=1

Table 2.4. Aspects of Bornholm Assessed as Very Important *Percentages*

Features Base: Holidaymakers	1st Qtr 1996 231	2nd Qtr 1996 642	3rd Qtr 1996 1056	4th Qtr 1996 75	All Year 2004
Beaches	13	18	32	35	25
Landscape	22	47	62	69	53
Cycle routes	8	12	27	20	20
Walking	10	20	23	28	21
Fishing towns	11	24	33	37	28
Nature	24	51	68	75	58
Golf courses	1	1	3	2	2
Fishing	2	3	4	9	3
Cultural history	9	12	16	21	14
Restaurants	6	6	8	11	7
Craft/art workers	6	13	15	20	14
Atmosphere	20	39	64	58	51
Variety of activities	4	6	13	8	10

3. Organisation of the visit

In addition to asking visitors about channels of marketing communication, they were also asked about the various channels they used in order to secure their booking. All visitors staying in paid accommodation, irrespective of the purpose of their trip, were asked how they made their bookings, and, finally, all visitors were asked whether they had been to a tourist information centre on the island.

Findings

3.1. Bookingpatterns

All holidaymakers reported that they were more likely to make their own arrangements than use a travel intermediary either by purchasing a package tour or going to a travel agent (Table 3.1). Accommodation booking arrangements, as shown in table 3.2, reveal a similar pattern to this, in that all visitors tend to book directly. This was true of all quarters.

3.2. Tourist Information Centre Usage

Of the 7 tourist information centres on Bornholm, the one at Rønne is the most used, followed by the centres at Nexø-Dueodde and North Bornholm, Allinge (Table 3.3). This relates to location at the main point of entry and the concentration of tourist accommodation. The visitors in the third quarter are generally the largest users of the tourist information network. This is not surprising since the third quarter covers the major part of the tourist season on Bornholm, and is the quarter with the highest percentage of first time visitors who are expected to have the greatest need for information.

Table 3.1. Holiday Booking Patterns *Percentages*

Booking arrangements Base: Holidaymakers[1]	1st Qtr 1996 72	2nd Qtr 1996 413	3rd Qtr 1996 1041	4th Qtr 1996 72	All Year 1598
Organised by myself	71	57	65	75	64
Package tour	10	24	11	1	14
Travel Agent	17	17	22	22	20
Club/association	1	3	2	1	2
Other	1	*	*	0	1

Notes: 1. Includes holidays only, holidays and VFR, and holidays plus other reasons for the visit.
2. * means less than 0.5%

Table 3.2. Accommodation Booking Patterns *Percentages*

Booking arrangements Base: All visitors in paid accommodation	1st Qtr 1996 86	2nd Qtr 1996 364	3rd Qtr 1996 1050	4th Qtr 1996 81	All Year 1581
Booked it myself	51	37	49	61	47
Travel Agent	16	24	27	19	25
Bornholm Tourist Office	14	27	9	6	13
Summer house agency	8	7	6	3	6
Family/friends	4	1	1	1	1
Through work	5	1	1	1	1
Club/association	2	2	1	3	1
Chance	0	0	1	0	*
Other	0	1	5	7	4

Table 3.3. Tourist Information Centre Usage ***Percentages***

Information Centre **Base: All Visitors**	**1st Qtr 1996** **207**	**2nd Qtr 1996** **465**	**3rd Qtr 1996** **789**	**4th Qtr 1996** **84**	**All Year** **1545**
Aakirkeby	2	4	8	3	6
Gudhjem	4	8	15	9	11
Hasle	2	4	7	5	5
Nexø-Dueodde	6	8	18	10	13
North Bornholm, Allinge	9	12	14	11	13
Rønne, Velkomstcenter	13	15	18	14	16
Svaneke	7	5	8	9	7

4. Accommodation Usage and Evaluation

All staying visitors were asked about their accommodation on Bornholm in terms of type of place they stayed at, how long they were there and its whereabouts on the island. They were then given a list of attributes concerning their accommodation, including the physical aspects of the premises in respect of rooms, furnishings, equipment and so on. The list concerning the accommodation also takes in intangible attributes such as service and value for money. The visitors were asked to evaluate the list on a five point Likert scale. The range of the scale was 'Excellent' = 5, to 'Poor' = 1.

Findings

4.1. Type of Accommodation

Throughout 1996 summer houses proved to be the most popular type of accommodation used (Table 4.1). For the visitors in the first quarter and the fourth quarter of 1996, staying with friends and relatives was the most significant type of accommodation used. In the third quarter summer houses were most frequently used. Some 36% of the tourists in the third quarter 1996 and 23% of the tourists in the second quarter of 1996 stayed in summer houses. In the second quarter of 1996 some 29% of the tourists used a hotel as accommodation and a similar share stayed with friends and relatives.

4.2. Evaluation of Accommodation

Table 4.2 presents an evaluation by all visitors of their place of accommodation that covers nine aspects:

- The physical accommodation;
- Location;
- Facilities;
- Decor;
- Cleaning standard;
- Food and beverages;
- Service level;
- Price;
- Value for money.

Overall, the average scores on the quality of physical accommodation, location, food and beverages and service were high. There is some concern on the price level. This is reflected in the overall value for money score, which links quality to price. All scores during the third quarter of 1996 are below the annual average and this has a clear effect on the annual scores. Tables 4.3 to 4.11 examine the different aspects of the visitors' perceptions of their place of stay by quarters. Overall, the tourists in the fourth quarter are the most satisfied with all aspects of their accommodation.

Table 4.1. Accommodation Usage *Percentages*

Accommodation Base: All Staying Visitors [1]	1st Qtr 1996 260	2nd Qtr 1996 684	3rd Qtr 1996 1143	4th Qtr 1996 99	All Year 2186
Hotel	18	29	21	19	23
B & B/Private Home	1	1	2	0	1
Farmhouse	*	2	2	1	2
Youth Hostel	*	1	3	0	2
Holiday Centre	2	5	4	2	4
Friends and Relatives	58	29	11	41	24
Summer House	11	23	36	16	28
Camping	*	1	10	0	6
Caravan	0	3	6	0	4
Other	9	6	6	19	7

Notes: 1. The base includes multiple accommodation use.
2. * means less than 0.5%

Table 4.2. Evaluation of Accommodation

Evaluation Average Score [1] Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 881	4th Qtr 1996 60	All Year 2059
Accommodation	4.16	4.17	4.05	4.31	4.12
Location	4.31	4.44	4.33	4.58	4.37
Facilities	4.02	3.91	3.81	4.21	3.90
Decor	4.00	3.96	3.86	4.25	3.93
Cleaning Standard	4.02	4.03	3.93	4.14	3.99
Food and beverages	4.04	4.30	4.11	4.41	4.18
Service	4.13	4.20	4.17	4.31	4.18
Price level	3.91	3.79	3.53	4.02	3.71
Overall value for money	4.06	3.93	3.68	4.22	3.85

Note: 1. The range was ‘Excellent’=5 to ‘Poor’=1

Table 4.3. Quality of Accommodation *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 70	2nd Qtr 1996 340	3rd Qtr 1996 859	4th Qtr 1996 64	All Year 1333
Excellent	49	40	34	50	37
Good	26	39	42	36	40
Average	21	18	20	11	19
Not good enough	1	2	3	2	3
Poor	3	*	1	2	1
Average score [1]	4.16	4.17	4.05	4.31	4.10

Notes: 1. The range was ‘Excellent’=5 to ‘Poor’=1
2. * means less than 0.5%

Table 4.4. Quality of Location *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 72	2nd Qtr 1996 359	3rd Qtr 1996 919	4th Qtr 1996 64	All Year 1414
Excellent	50	54	47	69	50
Good	35	36	40	23	38
Average	13	9	12	6	11
Not good enough	1	1	1	0	1
Poor	1	0	*	2	*
Average score[1]	4.31	4.44	4.33	4.58	4.37

Notes: 1. The range was ‘Excellent’=5 to ‘Poor’=1
2. * means less than 0.5%

Table 4.5. Quality of Facilities *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 64	2nd Qtr 1996 321	3rd Qtr 1996 843	4th Qtr 1996 58	All Year 1286
Excellent	36	28	24	43	26
Good	33	40	41	36	40
Average	30	27	29	19	28
Not good enough	0	5	4	2	4
Poor	2	*	2	2	2
Average score[1]	4.02	3.91	3.81	4.21	3.86

Notes: 1. The range was ‘Excellent’=5 to ‘Poor’=1
2. * means less than 0.5%

Table 4.6. Quality of Decor *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 68	2nd Qtr 1996 348	3rd Qtr 1996 892	4th Qtr 1996 60	All Year 1368
Excellent	34	30	26	40	28
Good	37	42	42	45	42
Average	27	23	25	15	24
Not good enough	2	4	5	0	4
Poor	2	1	2	0	2
Average score[1]	4.00	3.96	3.86	4.25	3.91

Note: 1. The range was ‘Excellent’=5 to ‘Poor’=1

Table 4.7. Cleaning Standard *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 70	2nd Qtr 1996 340	3rd Qtr 1996 703	4th Qtr 1996 49	All Year 1162
Excellent	40	34	32	45	34
Good	31	40	41	33	40
Average	24	22	20	16	21
Not good enough	2	3	5	4	4
Poor	3	1	3	2	2
Average score[1]	4.02	4.03	3.93	4.14	3.97

Note: 1. The range was 'Excellent'=5 to 'Poor'=1

Table 4.8. Quality of Food and Beverages *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 49	2nd Qtr 1996 202	3rd Qtr 1996 488	4th Qtr 1996 44	All Year 783
Excellent	41	50	37	59	42
Good	35	33	43	27	39
Average	18	15	16	11	16
Not good enough	0	2	3	0	2
Poor	6	1	1	2	1
Average score[1]	4.04	4.30	4.11	4.41	4.17

Note: 1. The range was 'Excellent'=5 to 'Poor'=1

Table 4.9. Quality of Service *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 62	2nd Qtr 1996 286	3rd Qtr 1996 555	4th Qtr 1996 49	All Year 952
Excellent	44	45	39	55	42
Good	34	36	42	33	39
Average	18	14	17	4	15
Not good enough	2	3	1	4	2
Poor	3	2	1	4	2
Average score[1]	4.13	4.20	4.17	4.31	4.18

Note: 1. The range was 'Excellent'=5 to 'Poor'=1

Table 4.10. Price Level *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 838	4th Qtr 1996 59	All Year 2015
Excellent	30	22	18	37	22
Good	33	41	31	34	35
Average	33	32	38	24	34
Not good enough	3	5	10	3	7
Poor	0	0	3	2	1
Average score[1]	3.91	3.79	3.53	4.02	3.71

Note: 1. The range was ‘Excellent’=5 to ‘Poor’=1

Table 4.11. Overall Value for Money *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 881	4th Qtr 1996 60	All Year 2059
Excellent	35	27	20	45	26
Good	43	45	38	35	41
Average	18	24	33	17	27
Not good enough	2	3	6	3	4
Poor	3	1	2	0	2
Average score[1]	4.06	3.93	3.68	4.22	3.85

Note: 1. The range was ‘Excellent’=5 to ‘Poor’=1

5. Visits to Attractions

Visitors were presented with a long list of attractions on Bornholm. For ease of presentation the list of attractions has in this report been divided into four categories:

- Heritage attractions;
- Museums;
- Natural attractions;
- Craft and other attractions.

The tables below show whether the tourists had visited the different attractions on this trip or not.

Findings

5.1. Heritage Attractions

As shown in table 5.1, the significant heritage attractions for all visitors are Hammershus Castle and Østerlars round church. The percentages shown in these tables are estimates of the visitor market penetration rate of each listed attraction during the period January - December 1996. As would be expected, the visitors in the third quarter, which constitutes the bulk of the holiday season, have a higher propensity to visit heritage attractions than others. This should be seen in connection with many first time visitors (39%) in the third quarter.

5.2. Natural Attractions

Natural attractions are also of most significance to tourists in the third quarter of 1996 (Table 5.2). The visitor market penetration rates of the natural attractions are lowest in the first quarter.

5.3. Museums

Museums are generally not well attended (Table 5.3), the only exception being the Bornholms Art Museum. The visitors in the third quarter of 1996 are more likely to visit museums than others. It should be taken in consideration that most museums, except for the Bornholms Art Museum and Bornholms Museum, close down at the end of October until mid-May.

5.4. Craft and Other Attractions

Of the remaining attractions, glass blowing and visiting a fish smoke house are the most popular (Table 5.4). In 1996 some 47% of the total number of tourists visited a glass factory/shop and 54% visited a fish smoke house. Both the glass blowers and the fish smoke houses were most frequently visited in the third quarter.

5.5. Additional Attractions Visited

To ensure complete coverage, visitors were also asked to record other attractions they had been to and the following is a list of the features of Bornholm that were mentioned by fifteen or more respondents:

- Døndalen;
- Dueodde;
- Various towns;
- Rø Plantation.

Table 5.1. Visits to Heritage Attractions *Percentages*

Attraction Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Hammershus Castle	17	47	71	39	56
Hammershus exhibition	2	7	16	6	10
Østerlars round church	7	33	46	13	34
Other churches	6	26	44	19	31

Table 5.2. Visits to Natural Attractions *Percentages*

Attraction Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Christiansø	2	12	21	7	15
Gardens	1	5	14	5	9
Randkløve Skaar	1	3	7	1	5
Paradisbakkerne	4	18	32	11	22
Ekkodalen	4	16	29	16	20
Rytterknægten	4	16	26	14	19
Helligdomsklipperne	7	30	49	17	35
Jons Kapel	4	19	35	17	24

Table 5.3. Visits to Museums *Percentages*

Museum Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Bornholms Art Museum	4	15	18	10	15
Bornholms Museum	3	6	11	4	8
Gudhjem Museum	n/a[1]	3	6	2	4
Nexø Museum	n/a[1]	2	5	3	3
Martin Andersen Nexø Museum	n/a[1]	2	4	0	3
Defence Museum	n/a[1]	1	3	2	2
Quarry Museum	n/a[1]	5	9	4	6
Farm Museum	n/a[1]	5	11	4	7
Automobile Museum	n/a[1]	1	5	2	3
Erichsens Gaard	n/a[1]	2	5	2	3

Note: 1. n/a - not available, because the museum was closed during the time in question

Table 5.4. Visits to Craft and Other Attractions *Percentages*

Attraction Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Glass factory/shop	8	39	67	27	47
Ceramic factory/shop	4	20	45	12	29
Art galleries	2	16	38	7	24
Brændesgårdshaven	n/a[1]	5	23	2	13
Fish smoke house	7	50	74	25	54
Zoo	n/a[1]	3	12	2	7
A lighthouse	6	18	37	11	25

Note: 1. n/a - not available, because the attraction was closed during the time in question

6. Activities undertaken by visitors

In addition to being asked about any trips to attractions, visitors were given a list of the common activities available on Bornholm and were asked about their participation in them. Activities were grouped into the following broad categories:

- Water based activities;
- Specific activities;
- Entertainment;
- General recreational activities.

Findings

6.1. Water Based Activities

The most popular water based activity over the year was going to the beach (Table 6.1). Swimming in the sea, and to some extent swimming in a pool and boat trips, were also popular in the third quarter of 1996. Throughout 1996 some 34% of the visitors went to the beach. The corresponding share in the third quarter was 54%, which reflects the island's importance as a beach holiday destination.

6.2. Specific Activities

To complement water activities such as windsurfing or fishing, visitors were asked whether they had played golf, taken a scenic air flight or had gone to the trotting races (Table 6.2). Overall, participation in specific activities is relatively small. This is true of all quarters.

6.3. Entertainment Activities

Many leisure tourists are compulsive shoppers, so it is not surprising that shopping is an important activity (Table 6.3). In 1996 some 51% of the visitors went shopping. In the third quarter of 1996 more than three fourth went shopping. Given that there is a considerable amount of self-catering amongst holidaymakers and there are many people on holiday who are visiting friends and relatives, eating out is also a popular form of entertainment. 46% of all the visitors to Bornholm in 1996 ate out during their stay. The share varies from 10% in the first quarter to 70% in the third quarter.

6.4. Generel Recreational Activities

Commensurate with the image of Bornholm as a holiday island where life proceeds at a leisurely pace, table 6.4 indicates that just relaxing and driving around are common general recreational activities. More than half of the visitors in 1996 were just relaxing (56%) or driving around (52%). Among the visitors in the third quarter of 1996 some 81% were just relaxing and 72% drove around. Cycling is also significant, particularly for visitors in the third quarter.

6.5. Other Activities

Other activities recorded by visitors, but only for small numbers, were horse riding, mini-golf, going to harbour fairs and participating in various sport arrangements. Some of these activities are related to the summer season only.

Table 6.1. Participation in Water Based Activities *Percentages*

Activity Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Going to the beach	6	21	54	11	34
Swimming in the sea	1	5	40	4	21
Swimming in the pool	2	5	20	4	12
Windsurfing	0	*	2	0	1
Boat trips	n/a[1]	6	20	3	12
Fishing	0	3	6	2	4

Notes: 1. n/a - not available during the time in question
2. * means less than 0.5%

Table 6.2. Participation in Specific Activities *Percentages*

Activity Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Scenic air flight	0	1	2	0	1
Golf	0	2	3	0	2
Trotting races	1	2	5	1	3

Table 6.3. Participation in Entertainment Activities *Percentages*

Activity Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Music recitals	1	1	7	0	4
Going to the cinema	1	1	2	3	2
Eating out	10	30	70	26	46
Shopping	13	30	77	45	51

Table 6.4. Participation in General Recreational Activities *Percentages*

Activity Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
Cycling	2	15	38	10	24
Guided coach tour	0	8	8	3	7
Guided walks	1	3	6	5	4
Walks on my/our own	13	29	51	27	37
Just relaxing	19	38	81	51	56
Driving around	14	39	72	54	52

7. Transport

Visitors were asked to name the three most important methods they used for travelling around Bornholm. The results were then cumulated.

Findings

7.1. Transport Mode

1.By far the most popular mode of transport used for travelling about the island is the car (Table 7.1). Some 79% of all visitors in the considered period have used a car. The share is high in all quarters. In second place comes moving around the island by bicycle. In the third quarter of 1996 some 41% of the visitors used a bicycle to move around the island. Altogether in 1996 some 28% used a bicycle as mode of transport.

Use of the car is most frequent amongst those coming in the fourth quarter of 1996 followed by the visitors in the third quarter. It does not come as a surprise that a bicycle is, compared to the use of bicycle during the other quarters, most frequently used amongst the visitors in the third quarter. The first quarter of 1996 was dominated by much snow and ice, it is therefore understandable that use of taxis scores higher in this period than during the other quarters.

Table 7.1. Transport Mode by Country *Percentages*

Transport **Base: All Visitors [1]**	**1st Qtr 1996** **334**	**2nd Qtr 1996** **737**	**3rd Qtr 1996** **1128**	**4th Qtr 1996** **117**	**All Year** **2316**
Public Bus	20	15	16	21	17
Coach Tour	1	10	8	8	8
Taxi	17	8	4	6	7
Car	71	78	82	84	79
Motorbike	0	*	1	0	1
Bicycle	7	18	41	24	28
On foot	30	36	27	51	3
Other	3	1	1	1	1

Notes: 1. Percentages will add up to more than 100% because of multiple use.
2. * means less than 0.5%.

8. Visitor Expenditure

One of the most difficult aspects of the survey were questions to visitors about their expenditure patterns. Overall amounts of expenditure were asked for, including return transport costs from the mainland to Bornholm, together with a more detailed breakdown of expenditure on the island. An important distinction is made between those travelling on an inclusive (package) trip and those travelling independently, albeit that they may have used an agency to make the necessary bookings. Only gross values are shown here but a more detailed analysis is possible.

Findings

8.1. Expenditure per Person per Trip

The expenditure per person per trip reflects the difference between lengths of stay. Visitors in the third quarter stay the longest on average and therefore tend to spend the most (Table 8.1). It is also the case that expenditure tends to be higher on a package tour, at an average of DKK 2 841 per person per trip, than for those travelling under their own arrangements, at an average of DKK 2 497 per person per trip. This is reflective of the fact that visitors on an inclusive tour are more likely to be using serviced accommodation rather than self-catering.

8.2. Expenditure per Person per Day

When comparisons are made on the basis of expenditure per person per day, those on an inclusive tour record the highest daily spending (Table 8.2). Visitors on an inclusive tour spend 406 DKK per person per day while visitors on an independent tour spend DKK 294 per person per day. The difference in expenditure per person per day reflects the seasonality in the prices during the year. The prices are lowest in the fourth and first quarter and highest in the third and second quarter.

Table 8.1. Expenditure per Person per Trip *DKK*

Country Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 979	4th Qtr 1996 225	All Year 2322
Independent	1.319	2.209	3.361	1.594	2.497
Inklusive	1.750	3.096	3.147	2.398	2.841
All	1.333	2.333	3.335	1.769	2.545

Table 8.2 Expenditure per Person per Day *DKK*

Country Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 979	4th Qtr 1996 225	All Year 2322
Independent	276	325	290	240	294
Inklusive	324	512	389	254	406
All	278	351	297	244	307

9. Bornholm as a Visitor Destination

In the final section of the questionnaire, visitors were asked about their overall impressions of Bornholm in terms of:

- Being a place to visit for holidays and recreation;
- Value for money;
- What they thought would improve the island as a tourist destination;
- Any particular likes or dislikes about Bornholm.

Evaluation measurement was carried out on the now familiar five point Likert scale, with a range from 'Excellent' = 5, to 'Poor' = 1. Finally, visitors were asked about the likelihood of their returning to the island.

Findings

9.1. Place to Visit for Holiday and Recreation

As a holiday destination, Bornholm is highly rated by all visitors, without exception (Table 9.1). The results are almost alike in the different quarters. When it comes to the question concerning value for money the visitors in the first quarter and the second quarter proved to be the most satisfied.

9.2. Likes about Bornholm

The most popular remarks on what visitors like about Bornholm are:

- The landscape and nature;
- Local hospitality and friendliness;
- Well marked cycle, foot and jogging paths;
- Clean and nice island;
- Quiet and harmonious, with a good atmosphere, and nice that Bornholm is a small island;
- Houses and gardens are very well kept.

9.3. Dislikes about Bornholm

When asking visitors what they disliked about Bornholm, they tended to repeat the suggestions already made for improvements, save that the ranking, in terms of significance, was changed. Top of their agenda for dislikes are seaweed on the beaches, the weather, too many tourists, lack of value for money and signposting. Beyond this, there are a whole series of individual dislikes that relate to the personal experiences of the respondent. These latter comments serve to amplify the complex nature of the tourist purchase, which involves the visitor coming into contact with a great variety of people and places, so that a poor experience at one service encounter can colour the visitor's whole attitude to the destination.

9.4. Probability of Returning

Table 9.3 examines the probability that visitors will return to Bornholm. The visitors in the first quarter and the fourth quarter of 1996 show the highest likelihood of returning. This has to be seen in connection with the main purpose of visit in those quarters. In both the first quarter and the fourth quarter many tourists come the island to visit friends and relatives or to combine holiday with visiting friends and relatives.

Overall, 42% of the visitors in 1996 replied that they certainly will return to Bornholm.

9.5. Possible Time of Return

With respect to the timings of a return trip to Bornholm, visitors were asked in a staged process, from ‘This year’ up to the ‘Next five years’, when they were likely to come back to the island. The results are shown in table 9.4. There are possibilities of multiple answers here, in that the same respondent could be coming back several times within the time frame given. The answers reported are those saying ‘Certain’ or ‘Likely’ only. Thus, 26% of the visitors in 1996 indicated that they were either certain or likely to return next year. It should be noticed that the difference between the number of visitors saying they will be back this year in the four quarters is caused to some extent by the time of the year the interview took place, hence coming during the fourth quarter of 1996 one would be less inclined to return the very same year than the visitors in the first quarter and the second quarter.

Table 9.1. Bornholm as a Holiday Destination *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1099	4th Qtr 1996 107	All Year 2324
Excellent	74	75	72	74	73
Good	22	22	24	22	23
Average	4	2	4	4	3
Not good enough	*	*	*	1	*
Poor	1	*	0	0	*
Average score[2]	4.67	4.71	4.68	4.68	4.69

Notes: 1. * means less than 0.5%
2. The range was ‘Excellent’ = 5 to ‘Poor’ = 1

Table 9.2. Value for Money *Percentages*

Evaluation Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1005	4th Qtr 1996 92	All Year 2215
Excellent	37	31	22	21	27
Good	30	37	37	36	36
Average	25	26	33	39	30
Not good enough	6	4	7	3	6
Poor	1	1	1	1	1
Average score[1]	3.96	3.92	3.72	3.72	3.83

Note: 1. The range was ‘Excellent’ = 5 to ‘Poor’ = 1

Table 9.3. Probability of Returning *Percentages*

Probability Base: All Visitors	1st Qtr 1996 319	2nd Qtr 1996 705	3rd Qtr 1996 1098	4th Qtr 1996 107	All Year 2229
Certain	57	45	33	62	42
Likely	25	27	31	21	28
Maybe	14	23	30	11	25
Unlikely	4	5	6	6	5
Certainly not	*	1	*	1	*

Note: 1. * means less than 0.5%

Table 9.4. Timing of Return by Country *Percentages*

Timing[1] Base: All Visitors	1st Qtr 1996 361	2nd Qtr 1996 757	3rd Qtr 1996 1150	4th Qtr 1996 123	All Year 2391
This year	32	27	9	24	19
Next year	34	24	23	50	26
Next 2 years	7	13	22	21	17
Next 5 years	6	15	33	20	23

Note: 1. The answers refer to 'Certain' and 'Likely' only as a percentages of all respondents.

10. Characteristics of Bornholm Residents

This part of the report covers the Bornholm residents leaving Bornholm by ferry or aeroplane in the period January - December 1996. The residents were asked about their destination, purpose of trip and party size.

Findings

10.1. Destination

Overall, 66% of the residents stated their destination as somewhere in Denmark and 21% mentioned somewhere in Sweden (Table 10.1). While looking at the quarters it appears that Denmark as a destination is most noticeable in the second quarter. Some 73% of the residents had some place in Denmark as their destination in the second quarter of 1996. In the fourth quarter 35% of the residents were leaving to a destination in Sweden. In the third quarter the corresponding share was 12%.

10.2. Purpose of Trip

Table 10.2 shows purpose of trip. The main purpose for the residents was visiting friends and relatives followed by visiting friends and relatives while on holiday. There are some differences between the quarters. In the third quarter of 1996 ‘holiday’ was the main purpose of the travel. In the fourth quarter ‘day visit’ was the main purpose followed by visiting friends and relatives. Solely visiting friends and relatives was the main purpose in the first quarter and the fourth quarter of 1996 while visiting friends and relatives when on holiday was the most often mentioned purpose in the second quarter of 1996.

10.3. Party size

Party size analysis is shown in table 10.3. In the first six month of 1996 some 49% of the residents were travelling alone. Among the residents in the fourth quarter 46% were travelling alone. In the fourth quarter of 1996 some 42% mentioned a party size consisting of two persons. Overall, average party size was just above two persons. The party size was lowest in the first quarter and highest in the third quarter.

Table 10.1. Residents by Border Destination ***Percentages***

Destination Base: Residents	1st Qtr 1996 589	2nd Qtr 1996 630	3rd Qtr 1996 194	4th Qtr 1996 346	All Year 1759
Denmark	65	73	68	54	66
Sweden	21	17	12	35	21
Germany	4	4	4	5	4
Norway	1	1	3	1	1
Others	9	5	13	5	7

Table 10.2. Residents by Purpose *Percentages*

Purpose Base: Residents	1st Qtr 1996 918	2nd Qtr 1996 907	3rd Qtr 1996 197	4th Qtr 1996 359	All Year 2381
Business conference/ meeting/exhibition	18	17	4	5	15
General business	9	8	6	8	8
Holiday	7	9	35	10	11
Holiday/VFR	13	25	16	10	17
VFR solely	19	18	20	21	19
Sporting event	3	2	2	2	2
Education	6	2	2	3	4
Hospital	6	5	1	2	5
Day Visit	10	8	6	32	12
Other (including above combinations)	9	6	8	7	7

Table 10.3. Visitors by Party Size *Percentages*

Party Size Base: Residents	1st Qtr 1996 609	2nd Qtr 1996 651	3rd Qtr 1996 208	4th Qtr 1996 363	All Year 1831
1	49	49	27	46	46
2	32	32	42	33	33
3	10	8	11	10	9
4	5	7	16	6	7
5	2	2	2	2	2
6	1	1	1	1	1
More than 6	2	2	1	2	2
Average (persons)	2.08	2.42	2.53	2.26	2.29