

Survey of Visitors to Bornholm

January 1999 - December 1999

**Results prepared by
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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 the Research Centre of Bornholm. 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, the Research centre of Bornholm and Stephen Wanhill, Bournemouth University and the research Centre of Bornholm; 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 as a part of the Unit will continue until the end of 1999. This report is the last survey report financed by the programme. Recently it has been decided to continue the survey for an indefinite period at the Research Centre's own expense.

April 2000

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The composition of the report

The report is divided into four chapters. The first chapter provides the reader with some general information about the survey design. In the second chapter the collected data are used to estimate the number of visitors and visitor nights in the years 1996 - 1999. The third section describes the visitors departing by ferry in the period January 1999 - December 1999. 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 chapter four. Throughout the report there will be made comparisons with the previous years when appropriate.

1. Survey design

1.1. Introduction

Leisure tourism on Bornholm is not a new phenomenon. It began in the 1860s and gained 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 and Poland.

Apart from records of overnight stays and the number of ferry and air passengers kept by Denmark's Statistic and Bornholms Airport, and evidence from national surveys commissioned by the Danish Tourist Board, 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 holiday cottage users with the primary purpose of assessing the quality of summer house provision (Hasløv and Kjærsgaard I/S, 1995).

1.2. Survey objectives

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.

The overall objective is to provide a comprehensive description of visitors to Bornholm that was in keeping with the standard analysis of destination surveys. Because the survey has been conducted in four and a half year the data can also disclose trends in visitor patterns. The questionnaire is structured to include the following as objectives of the enquiry:

- Demographics: the profile and characteristics of visitors;
- Communication: awareness and influences on the decision to visit;
- Behaviour: what visitors do on the islands;
- Attitudes: what visitors think about their experiences on Bornholm;
- Expenditure: how much visitors spend on the island.

Enclosed as Appendix I is the questionnaire concerning sea departures in 1999. The questionnaires were made up in five different languages (Danish, Swedish, German, English and Polish).

1.3. Survey methodology

Interviewing arrangements are structured so as to guarantee representative data on a quarterly basis (at a minimum, every day of the week and each week in any one month for every quarter of the year is surveyed). This is done so as to ensure that no systematic bias can arise in the

quarterly reporting of information. Contacts will only be adults, using as the definition 16 years of age and upwards.

Interviewing is carried out at the main points of exit and departure so that data collection take place mostly on BornholmsTrafikken's ferry departures to Copenhagen, Ystad (Sweden) and Sassnitz (Germany) and Scandlines/DFO's to Ystad and Sassnitz. The length of the questionnaire and terminal arrangements make it necessary for the interviewers to conduct the survey on the ferries and the aircraft. Cost dictate that respondents will be introduced to the questionnaire and thereafter complete it themselves, with interviewers on hand to deal with any issues that may arise.

The limited number of source markets for Bornholm indicates that the working sample size need not be large. But the paucity of information about visitors to the island commends a strategy of over-sampling so as to ensure results that are robust. A pilot questionnaire was run among tourists visiting the island by ferry in early June 1995 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 is anticipated that the chosen method of interviewing can lead to some wastage in the form of unusable returns, but this will be accommodated within the target.

1.4. The year 1999

This report covers the tourists and the residents leaving Bornholm in the period 1 January 1999 - 31 December 1999. The frequency tables in the report are based on the statistics shown in table A. over the year 1,358 visitor questionnaires were collected, with a wastage rate of just over 4% together with 1,077 screen responses containing basic information about trip movements of the residents of Bornholm.

Table A Sample (departing by ferry)

	1st Qtr 1999		2nd Qtr 1999		3rd Qtr 1999		4th Qtr 1999		All Year	
	Base	%	Base	%	Base	%	Base	%	Base	%
Visitors	152	34	313	44	516	78	377	62	1,358	56
Residents	299	66	399	56	146	22	233	38	1,077	44
Total	451	100	712	100	662	100	610	100	2,435	100

Overall, some 56% of the sample were visitors. Some 58% of the contacts were male and 42% female.

In section two and three 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.

1.5. Acknowledgements

It would have been impossible to conduct this survey without the help and effort of many people. The ferry companies, BornholmsTrafikken and DFO/Scandlines 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.

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 1999, three interviewers, Tino Deuleran, Kasper Hansen and Hanne Nimskov, were involved in collecting data and the data processing. The author was responsible for the data processing, mainly the control of the database and analyses work. The author took care also of the overall planning of schedules, contact with transport companies and other administrative duties in regard to the survey. Johnny Rassing has made the tables in the report.

2. Number of visitors and visitors nights

The Research Centre of Bornholm has been collecting data among visitors departing the island since July 1995. By using this data it is possible to make an estimate of the total number of visitors on Bornholm and the total number of visitor nights on the island.

The essential data are:

- N = the total number of contacted parties leaving Bornholm in the period (The Research Centre of Bornholm)
- N_{sea} = the total number of contacted parties on the departing ferries (The Research centre of Bornholm)
- N_{air} = the total number of contacted parties on the departing aeroplanes (The Research Centre of Bornholm)
- PV_{sea} = average party size among the visitors on the departing ferries (The Research centre of Bornholm)
- PV_{air} = average party size among the visitors on the departing aeroplanes (The Research Centre of Bornholm)
- PR_{sea} = average party size among the residents on the departing ferries (The Research centre of Bornholm)
- PR_{air} = average party size among the residents on the departing aeroplanes (The Research Centre of Bornholm)
- R_{sea} = the number of Bornholm residents among the contacts made on the departing ferries (The Research Centre of Bornholm)
- R_{air} = the number of Bornholm residents among the contacts made on the departing aeroplanes (The Research Centre of Bornholm)
- V_{sea} = the number of visitors among the contacts made on the departing ferries (The Research Centre of Bornholm)
- V_{air} = the number of visitors among the contacts made on the departing aeroplanes (The research Centre of Bornholm)
- S = the total number of passengers departing Bornholm by ferry (Denmark's Statistic)
- A = the total number of passengers departing Bornholm by aeroplane (Bornholms Airport)
- L_{sea} = average length of stay among tourists departing by ferry (The Research Centre of Bornholm)
- L_{air} = average length of stay among tourists departing by aeroplane (The Research Centre of Bornholm)

$$N = N_{sea} + N_{air} = (R_{sea} + V_{sea}) + (R_{air} + V_{air})$$

The interviewers from the Research Centre are not allowed to interview two persons from the same party. Regarding this procedure every respondent represents a party and not only one person. This has to be taken into account when the total number of visitors is calculated.

The total number of people represented in the interviews made on the ferries and aeroplanes is:

$$P_{total} = P_{sea} + P_{air} = ((R_{sea} * PR_{sea}) + (V_{sea} * PV_{sea})) + ((R_{air} * PR_{air}) + (V_{air} * PV_{air})) = (RPR_{sea} + VPV_{sea}) + (RPR_{air} + VPV_{air})$$

The total number of visitors (T_{total}) on Bornholm is:

$$T_{total} = T_{sea} + T_{air} = ((VPV_{sea} / P_{sea}) * S) + ((VPV_{air} / P_{air}) * A) = (TV_{sea} * S) + (TV_{air} * A)$$

The total number of visitor nights on Bornholm can be calculated as:

$$O_{total} = (L_{sea} * T_{sea}) + (L_{air} * T_{air})$$

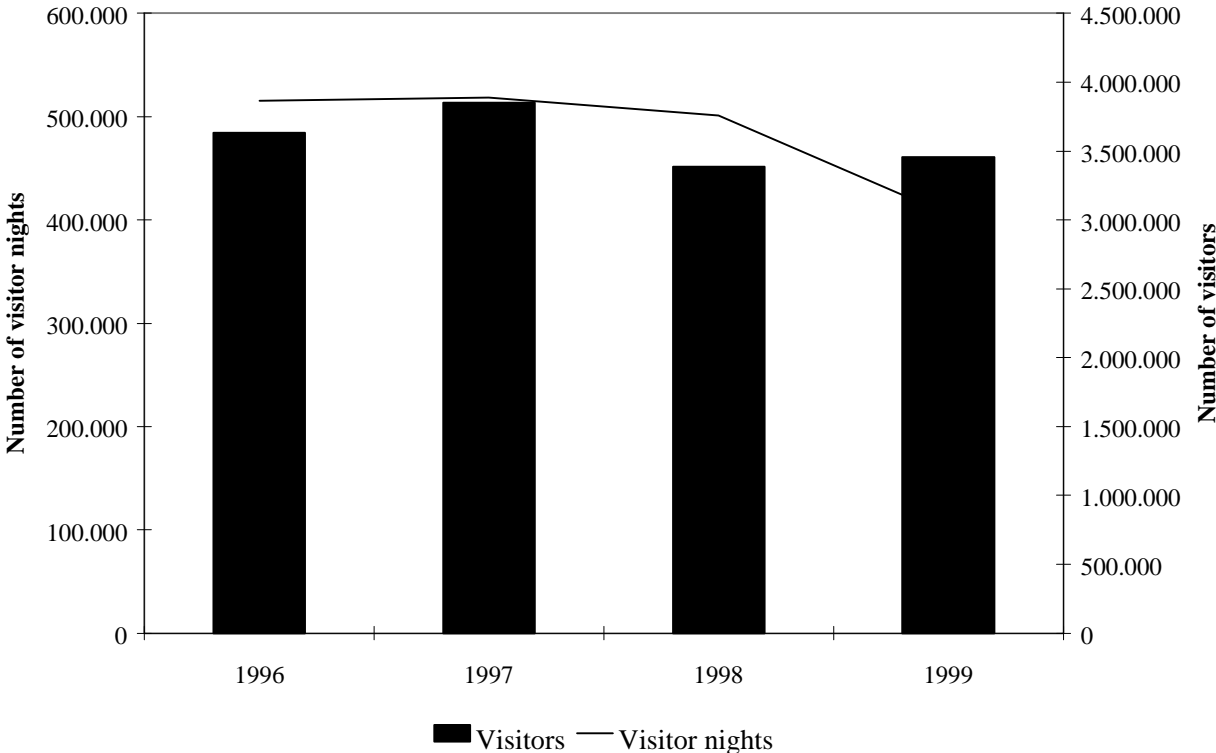
Table 2-1 shows the results of the calculations.

Table 2-1: Number of visitors and visitor nights

	1996	1997	1998	1999
Average length of stay	7.98	7.57	8.32	6.59
Number of visitors	484,000	514,000	451,000	461,000
Number of visitor nights	3,860,000	3,890,000	3,760,000	3,080,000

In both 1996 and 1997 the total number of visitor nights on Bornholm was almost 3.9 millions. In 1998 the number of visitor nights declined to 3.7 millions and in 1999 the total number was 3.1 million.

Figure 2-1: Number of visitors and visitor nights



In 1999 the total number of visitors turned out to be 461,000 compared with 451,000 visitors in 1998, 514,000 in 1997 and 484,000 in 1996. The average length of stay decreased from 1996 to 1997, increased from 1997 to 1998 and decreased again from 1998 to 1999 to the lowest level in the surveyed period.

3. Profile and characteristics of visitors

In this section of the report the data collected among visitors departing Bornholm by ferry in the period January 1999 - December 1999 are reported. Where appropriate comparisons with the previous years will be made.

3.1. 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

3.1.1. Key markets

The key markets for the island are Denmark, Germany and Sweden (Table 3-1). This is true for all quarters of 1999. Overall, some 52% of the visitors to Bornholm in 1999 were from the rest of Denmark.

These countries 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 fourth quarter of 1999 almost 60% of the visitors were from Denmark. The great number VFR visitors during Christmas time caused this. In the main season covered in the third quarter some 46% of the tourists were Danes and 38% were from Germany.

Comparing the results from the third quarter of 1999 with the results from the summer of 1969, the summer of 1976 and the third quarter of 1995, 1996, 1997 and 1998 it becomes evident that the key markets have not changed.

3.1.2. Type of visit

About 70% of the visitors interviewed during 1999 had been to Bornholm before (Table 3-2). This was also the case in 1996, 1997 and 1998. 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 Table 3-3 and Table 3-4.

Throughout 1999 almost 60% of the tourists had been to Bornholm more than 5 times before. The share increases to 65% in the fourth quarter. This pattern has been the same during the surveyed period from 1996 to 1999 and is closely related to the many tourists visiting friends and relatives around Christmas time.

3.1.3. Purpose of visit

The majority of the visitors to Bornholm in 1999 were on holiday. This is true for all quarters. In the second quarter of 1999 some 24% combined a holiday with visiting friends and relatives while one fifth of the visitors in the first and fourth quarter came solely to visit friends and relatives

The visitors to Bornholm in the period 1996 - 1999 came for holiday purposes (Table 3-5). Overall, 56% of visitors in 1999 gave the purpose of their trip to Bornholm as *holiday*.

This is the lowest number observed until now. In 1996, 1997 and 1998 the corresponding shares were respectively 59%, 67% and 61%.

3.1.4. Party composition

Visitors were asked about whom they were travelling with (Table 3-6) and adult couples and families with children below 15 years formed the core of the market. This kept average party size to 3.43 persons (Table 3-7) compared with 3.18 persons in 1998, 2.86 persons in 1997 and 2.68 persons in 1996. The average party size has increased during the period 1996 - 1999.

There are some differences in the average party size throughout the year 1999. The average party size is higher during the third quarter because of more family holiday groups. In the third quarter the average party size is 4.20 while the average party size in the first and second quarter is 2.85 persons. It should be noticed that 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.

3.1.5. Length of stay

The visitors in the third quarter stayed almost three days longer than the visitors in the first quarter (Table 3-8). Throughout 1999 the average length of stay was 7.32 days. The average length of stay has declined from 1996 - 1999. In 1996 it was 8.68 days, in 1997 it was 9.11 days and in 1998 it was 8.42 days.

The absence of a short break market of substance on Bornholm in the main season (July and August) is reflected in an average length of stay which was 9.25 days in the third quarter of 1995, 10.78 days in the third quarter of 1996, 10.05 in the third quarter of 1997, 9.98 days in the third quarter of 1998 and 8.12 days in the third quarter of 1999. Less than 23% of all the visitors in the period 1996 - 1999 have been on day visits or short break holidays.

3.1.6. Socio-economic characteristics

Occupational characteristics of visitors in the period July 1995 - December 1999 covered are principally professional, managerial and administrative.

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 3-12).

Table 3-1: Visitors by country of residence

Country	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	152	313	515	377	1357
Denmark	55	55	46	58	52
Sweden	28	22	12	3	14
Germany	16	20	38	37	31
Others	1	3	4	2	3

Table 3-2: Visitors by type of visit

Percentages

Visit	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	313	490	365	1241
First	12	26	36	20	27
Repeat	88	74	64	80	73

Table 3-3: Visitors by number of visits

Percentages

Previous Visits	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: Repeat Visit	122	313	305	283	861
1	7	7	23	10	13
2	6	9	19	8	12
3	4	8	8	7	7
4	3	5	7	5	5
5	3	4	4	5	4
6-10	16	16	12	11	10
11-20	15	12	8	10	10
21-50	35	17	8	8	11
More than 50	11	22	11	36	28

Table 3-4: Visitors by last visit

Percentages

Last Visit	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: Repeat Visit	107	236	471	360	1174
First visit	1	26	33	19	25
Earlier this year	23	17	15	46	26
Last year	63	34	11	13	21
Within last 2 years	3	8	7	9	7
Within last 5 years	3	6	11	5	8
More than 5 year	8	10	23	8	14

Table 3-5: Visitors by purpose

Percentages

Purpose	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1231
Business or other work	16	7	4	8	7
Holiday	32	55	73	43	56
Holiday/VFR	17	24	14	18	16
VFR solely	20	7	4	21	11
Education	2	0	1	1	1
Other (including above combinations)	13	7	4	9	9

Note: 1. * means less than 0.5%

Table 3-6: Visitors by party composition*Percentages*

Party Composition	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	120	263	489	366	1238
Travelling alone	26	23	8	21	17
Husband/wife/partners only	25	41	41	28	36
Family group: children under 15	16	13	23	22	20
Family group: children grown up	4	3	6	7	5
Family relations/friends	2	6	4	3	4
Friend/friends	15	8	9	5	8
Other	12	6	9	14	10

Table 3-7: Visitors by party size*Percentages*

Party Size	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	152	313	511	377	1353
1	33	24	11	23	20
2	33	46	46	35	41
3	11	11	13	15	13
4	9	12	17	11	13
5	5	3	4	6	5
More than 5	9	4	9	10	9
Average (persons)	2.88	2.84	4.20	3.10	3.43

Table 3-8: Visitors by length of stay*Percentages*

Period	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	122	253	481	365	1221
Day visit	21	10	5	3	6
Short stay ¹	24	12	10	21	16
Up to one week	30	45	43	47	43
One - two weeks	20	27	32	22	27
Two - three weeks	2	4	6	4	5
More than three weeks	3	2	4	3	3
Average (days)	5.43	6.85	8.12	7.22	7.32

Note: 1. Up to three days.

Table 3-9: Respondents' occupation*Percentages*

Occupation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year 1009
Base: All Visitors	93	174	409	333	1009
Self-employed	10	3	3	4	4
Professional and managerial	17	26	15	10	15
Administrative	22	17	30	40	30
Clerical	7	7	3	*	3
Skilled/unskilled wage earner	18	22	19	19	19
Assisting spouse	3	1	2	2	2
Employment not specified	0	0	1	1	1
Retired	10	14	22	16	19
Student	12	7	4	7	6
Economically inactive ¹	1	3	1	1	1

Notes: 1. Includes unemployed and home workers.

2. * means less than 0.5%

Table 3-10: Spouses' occupation*Percentages*

Occupation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year 702
Base: All Visitors	60	101	311	230	702
Self-employed	5	6	1	3	3
Professional and managerial	17	12	8	9	10
Administrative	18	22	33	37	31
Clerical	13	9	2	2	4
Skilled/unskilled wage earner	26	27	24	22	24
Assisting spouse	0	4	6	6	5
Employment not specified	0	15	2	1	1
Retired	14	0	21	15	18
Student	7	3	2	4	3
Economically inactive ¹	0	1	1	1	1

Note: 1. Includes unemployed and home workers.

Table 3-11: Respondents' education*Percentages*

Education	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year 1001
Base: All Visitors	97	208	379	316	1001
Up to 9 years	21	15	18	14	17
9 – 12 years	30	29	28	29	28
12 years + vocational	30	35	28	32	31
12 years + academic	20	21	26	25	24

Table 3-12: Respondents' age

Age	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	107	235	446	346	1134
16 - 24 years	12	7	3	7	6
25 - 34 years	22	15	16	13	15
35 - 49 years	32	29	32	36	33
50 - 59 years	14	23	22	24	22
60 - 69 years	14	19	20	15	17
Over 69 years	7	7	8	5	7

Table 3-13: Visitors' gross family income per annum

Family Income	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	97	197	352	297	946
Less than 200,000 DKK	30	25	17	21	21
200,000 - 400,000 DKK	43	45	45	40	44
400,000 - 700,000 DKK	20	26	32	32	29
Greater than 700,000 DKK	7	5	7	6	6

3.2. 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, 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 visitor's 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

3.2.1. 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 and fourth quarter of both 1997, 1998 and 1999 were most likely to have come to the island when they were children. This reflects the great number of Danish visitors in these quarters.

Some 12% of the visitors to Bornholm in 1999 had visited the island before with school. Overall, 40% of the visitors in had been to Bornholm as a child. This share varies between 59% in the first quarter and 36% in the third.

3.2.2. 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/relatives and family/friends on the island and the majority of the respondents are covered (Table 3-15). What then matters are the remaining means of

communication, and here guide books/brochures and newspaper/magazine advertisement are the most important items in 1996, 1997, 1998 and 1999.

3.2.3. 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 3-16). The highest scores in the period July 1995 - December 1999 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.

Other aspects of Bornholm that were considered very important by the visitors in 1999 and which were solicited in an open-ended question, were, in order of importance:

- The weather in terms of sun hours for Denmark as a whole;
- Peaceful atmosphere, relaxing;
- Peace and harmony;
- To experience the islands nature and specific language.

Table 3-14: Visited as a child

Percentages

As child	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: Repeat Visits	99	240	474	361	1174
No	41	64	66	56	60
Lived on Bornholm as a child	10	7	4	16	9
With family/friends	12	7	9	10	9
With/visit family/friends	3	4	2	3	2
With school	16	10	16	8	12
With club/association	2	*	1	*	1
With above combinations	16	7	2	7	7

Note: 1. * means less than 0.5%

Table 3-15: Finding out about Bornholm

Information Source	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	67	124	211	184	586
Always known	44	40	41	49	43
Family/friends on Bornholm	28	20	16	31	22
Newspaper/magazine ad.	6	5	8	5	6
Poster	3	3	2	1	2
Newspaper/magazine article	3	5	7	3	5
Travel agent	3	5	5	3	4
Club/association	8	5	3	1	3
Military	5	3	3	3	3
Recommended by family/friends	17	16	38	29	28
Guide book/brochure	3	8	10	9	8
TV ad. or programme	1	5	5	3	4
Radio	1	1	1	1	1
Travel show/exhibition	1	*	1	1	1
Other ⁴	1	2	5	7	5

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 choices.

3. * means less than 0.5%

4. Includes the Internet.

Table 3-16: Aspects of Bornholm

Evaluation	1st Qtr 1999		2nd Qtr 1999		3rd Qtr 1999		4th Qtr 1999		All Year	
	Score	Ranking	Score	Ranking	Score	Ranking	Score	Ranking	Score	Ranking
Base: All Visitors	83		171		401		289		944	
Family/friends on Bornholm	3.13	4	2.82	6	2.00	12	2.75	5	2.51	9
Beaches	2.80	6	2.84	5	2.97	5	2.83	4	2.89	5
Landscape	3.25	3	3.43	2	3.55	2	3.43	1	3.47	2
Cycle routes	2.55	8	2.22	12	2.42	9	2.36	9	2.42	10
Walking	2.63	7	2.69	9	2.62	7	2.68	6	2.65	7
Fishing towns	2.90	5	2.88	4	3.15	4	2.97	3	3.03	4
Nature	3.40	1	3.39	3	3.62	1	3.43	1	3.50	1
Golf courses	1.45	13	1.72	13	1.44	13	1.25	13	1.38	14
Fishing	1.74	12	1.59	14	1.43	14	1.53	12	1.51	13
Cultural history	2.55	8	2.79	7	2.85	6	2.55	7	2.72	6
Restaurants	2.47	9	2.67	10	2.31	11	2.00	11	2.29	12
Craft/art workers	2.31	10	2.74	8	2.56	8	2.48	8	2.55	8
Atmosphere	3.30	2	3.48	1	3.51	3	3.41	2	3.45	3
Variety of activities	2.20	11	2.44	11	2.41	10	2.22	10	2.34	11

Note: 1. The range was very important=4 to unimportant=1

Table 3-17: Aspects of Bornholm assessed as very important

Features	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year 944
Base: Holidaymakers	83	171	401	289	944
Friends/family on Bornholm	67	50	25	48	41
Beaches	34	35	35	34	35
Landscape	58	58	62	61	61
Cycle routes	35	22	25	20	24
Walking	28	27	22	27	25
Fishing towns	30	31	38	32	34
Nature	64	56	70	62	64
Golf courses	7	11	8	3	7
Fishing	15	7	4	6	6
Cultural history	23	29	21	16	21
Restaurants	24	23	11	5	13
Craft/art workers	16	28	17	14	18
Atmosphere	53	62	60	57	59
Variety of activities	9	23	14	11	14

3.3. 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, 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

3.3.1. Booking arrangements

All visitors in 1999 reported that they were more likely to book transport directly with the carrier than use a travel agent (Table 3-18). More than 70% booked the transport directly with the carrier while 18% bought a package tour from a travel agent, 27% used a travel agent near their home and 13% used a travel agent in Bornholm. Visitors using a travel agent tend to choose a travel agent near their home.

When it comes to accommodation booking arrangements 34% booked directly with the landlord/proprietor and a similar share booked accommodation through a travel agent. There are some differences between the four quarters. Especially in the first and fourth quarter many visitors are staying with friends and relatives meaning they do not have to book at all.

3.3.2. Tourist information centre usage

Of the 7 tourist information centres on Bornholm, Velkomstcentret at Rønne is the most used, followed by the centre at North Bornholm, Allinge and the centre at Nexø-Dueodde (Table 3-19). This relates to location at the main point of entry and the concentration of tourist accommodation. The ferries to Bornholm arrive at Rønne harbour, North Bornholm are host for many hotels and the majority of the holiday cottages are located in the areas surrounding Nexø. 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 3-18: Booking arrangements

Information Centre	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	85	155	306	256	802
Booked transport directly with the carrier	81	82	60	73	71
Booked transport through travel agent	30	51	58	45	51
Company took care of the bookings	9	14	7	7	8
Family/friends booked transportation	8	11	11	8	10
Booked accommodation directly with the landlord	31	36	40	25	34
Booked accommodation through a travel agent	9	24	45	29	34
Staying with friends and relatives	46	33	25	52	38
Family/friends booked accommodation	14	12	6	5	7
Bought a package tour from a travel agent	8	17	26	11	18
Used a travel agent near home	14	11	34	24	27
Used a travel agent in Bornholm	2	10	16	13	13
Booked through holiday cottage booking agency on Bornholm	9	7	9	11	9
Booked holiday cottage through agency elsewhere	7	11	8	8	8
Travel with club/association	8	10	6	4	6

Note: 1. Percentages can add up to more than 100% because of multiple choices.

Table 3-19: Tourist information centre usage

Information Centre	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	86	152	324	258	820
Aakirkeby	0	3	6	7	5
Gudhjem	6	9	11	5	8
Hasle	3	2	8	5	5
Nexø-Dueodde	3	9	11	13	10
North Bornholm, Allinge	6	12	12	6	10
Rønne, Velkomstcenter	14	15	18	11	15
Svaneke	4	4	6	7	5

3.4. 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

3.4.1. Type of accommodation

In the first, second and fourth quarter of 1999 staying with friends and relatives were preferred as type of accommodation (Table 3-20). In the third quarter holiday cottages proved to be the most popular type of accommodation used followed by hotels.

Throughout the period 1996 - 1999 hotels and holiday cottages were very popular as types of accommodation. This reflects the supply on the island. The hotels and the holiday cottages account for more than two-thirds of the bed capacity on Bornholm.

3.4.2. Evaluation of accommodation

Table 3-21 presents an evaluation by all visitors in 1999 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/beverages and service were high which was also the case in both the second half of 1995, all 1996, 1997 and 1998. There is some concern on the price level. This is reflected in the overall value for money score, which links quality to price. This is also true for the whole period.

Throughout the period 1996 - 1999 all scores during the third quarter are below the annual averages for the year and this has a clear effect on the annual scores.

Table 3-22 to Table 3-30 examine the different aspects of the visitors' perceptions of their place of stay by quarters of 1999. Overall, the tourists in the first half of 1999 are the most satisfied with all aspects of their accommodation except the location in the second quarter. The results from 1999 are the most positive in the surveyed period. All the average scores are above the levels in 1996, 1997 and 1998.

Table 3-20: Accommodation usage

Accommodation	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year 1001
Base: All Staying Visitors¹	84	188	387	339	1001
Hotel	19	23	29	15	22
B & B/Private Home	1	*	1	1	1
Farmhouse	1	*	*	2	1
Youth Hostel	0	2	1	1	1
Holiday Centre	1	2	4	2	3
Friends and Relatives	51	36	17	39	31
Holiday cottage	21	27	39	32	37
Camping	0	1	3	1	1
Caravan	0	3	2	1	1
Other	5	7	5	6	2

Notes: 1. The base includes multiple accommodation use.

2. * means less than 0.5%

Table 3-21: Evaluation of accommodation

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Average Score¹					
Base: All Visitors	84	133	342	165	1024
Accommodation	4.51	4.20	4.15	4.16	4.19
Location	4.71	4.37	4.38	4.39	4.40
Facilities	4.40	3.98	3.90	3.96	3.97
Decor	4.51	4.01	3.89	4.07	4.00
Cleaning Standard	4.26	4.14	3.93	3.98	4.01
Food and beverages	4.41	4.28	4.16	4.24	4.23
Service	4.36	4.33	4.17	4.20	4.23
Price level	3.98	3.96	3.68	3.74	3.77
Overall value for money	4.19	4.07	3.84	3.87	3.92

Note: 1. The range was *excellent*=5 to *poor*=1.

Table 3-22: Quality of accommodation*Percentages*

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	53	133	329	158	673
Excellent	64	45	40	36	42
Good	25	35	39	48	39
Average	9	16	19	14	16
Not good enough	2	4	2	2	2
Poor	0	1	1	1	1
Average score ¹	4.51	4.20	4.15	4.16	4.19

Note: 1. The range was *excellent*=5 to *poor*=1.

Table 3-23: Quality of location*Percentages*

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	52	134	342	165	693
Excellent	73	54	51	52	53
Good	21	32	38	38	36
Average	4	10	10	9	9
Not good enough	2	2	1	1	1
Poor	0	2	*	1	1
Average score ¹	4.62	4.31	4.38	4.39	4.40

Notes: 1. The range was *excellent*=5 to *poor*=1.

2. * means less than 0.5%

Table 3-24: Quality of facilities*Percentages*

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	53	122	309	149	633
Excellent	59	36	29	24	32
Good	26	31	39	51	39
Average	8	28	26	24	24
Not good enough	6	4	4	1	4
Poor	0	1	2	1	1
Average score ¹	4.32	3.98	3.90	3.96	3.97

Note: 1. The range was *excellent*=5 to *poor*=1.

Table 3-25: Quality of decor

Percentages

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	53	123	331	164	671
Excellent	64	37	28	26	32
Good	25	32	39	56	41
Average	9	29	28	18	24
Not good enough	2	2	4	1	3
Poor	0	1	1	0	1
Average score ¹	4.51	4.01	3.89	4.07	4.00

Note: 1. The range was *excellent*=5 to *poor*=1.

Table 3-26: Cleaning standard

Percentages

Evaluation	1st Qtr 1999	2 nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	53	113	273	111	543
Excellent	57	43	32	34	36
Good	28	37	37	39	37
Average	11	15	25	21	21
Not good enough	4	3	6	4	5
Poor	0	3	1	3	2
Average score ¹	4.38	4.14	3.93	3.98	4.01

Note: 1. The range was *excellent*=5 to *poor*=1.

Table 3-27: Quality of food and beverages

Percentages

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	39	104	196	66	405
Excellent	69	47	41	52	47
Good	10	34	38	27	32
Average	13	19	18	15	17
Not good enough	8	0	4	6	4
Poor	0	0	0	0	0
Average score ¹	4.41	4.28	4.16	4.24	4.23

Note: 1. The range *excellent*=5 to *poor*=1.

Table 3-28: Quality of service

Percentages

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	50	119	253	104	526
Excellent	54	50	40	39	44
Good	30	34	40	46	39
Average	14	14	19	12	16
Not good enough	2	2	*	1	1
Poor	0	0	1	2	1
Average score ¹	4.36	4.33	4.17	4.20	4.23

Notes: 1. The range was *excellent*=5 to *poor*=1.

2. * means less than 0.5%

Table 3-29: Price level

Percentages

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	49	119	321	147	636
Excellent	45	42	22	22	28
Good	20	19	33	38	31
Average	27	33	37	34	35
Not good enough	4	4	6	5	5
Poor	4	2	2	1	2
Average score ¹	3.98	3.96	3.68	3.74	3.77

Note: 1. The range was *excellent*=5 to *poor*=1.

Table 3-30: Overall value for money

Percentages

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	47	128	326	153	654
Excellent	51	36	26	21	28
Good	23	39	40	49	41
Average	19	22	29	28	27
Not good enough	6	2	4	1	3
Poor	0	1	2	1	1
Average score ¹	4.19	4.07	3.84	3.87	3.92

Note: 1. The range was *excellent*=5 to *poor*=1.

3.5. 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. The percentages shown in the tables are estimates of the visitor market penetration rate of each listed attraction during the period January - December 1999.

Findings

3.5.1. Heritage attractions

As shown in Table 3-31, the significant heritage attraction for all visitors is Hammershus Castle, which was also the case in 1996, 1997 and 1998. As would be expected, the visitors in the third quarter, which constitutes the bulk of the holiday season, have a higher propensity to visit Hammershus Castle, Østerlars round church and other churches. This should be seen in connection with many first time visitors in the third quarter.

3.5.2. Natural attractions

Throughout the period 1996 - 1999 natural attractions are also of most significance to tourists in the third quarter. Many tourists visit especially Helligdomsklipperne and Jons Kapel in the main season. In 1999 more than half of the tourists visited Helligdomsklipperne and Jons Kapel was visited by 46%.

The visitor market penetration rates of the natural attractions are lowest in the first quarter.

3.5.3. Museums

Museums are generally not well attended in the period July 1995 - December 1999, the only exception being the Bornholms Art Museum. In the second quarter of 1999 this museum was visited by 24% of the tourists to Bornholm while 20% of the visitors in the third quarter took a trip to Bornholms Art Museum. Also Gudhjem Museum and Nexø Museum were visited by more tourists in the second than the third quarter of 1999. The rest of the museums experienced most visitors in the third quarter.

Overall the visitors in the second and third quarter of 1999 were 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.

3.5.4. Craft and other attractions

Of the remaining attractions, glass blowing and visiting a fish smoke house were the most popular in 1996, 1997, 1998 and 1999. Both glass blowers and fish smoke houses were most frequently visited in the third quarter which again reflects the composition of the visitors to the island in the different quarters and the accessibility of the attractions.

Around 78% of the total number of tourists in 1999 visited a smoke house and 73% visited a glass factory/shop. These are the highest observed visiting frequencies in the period 1996 - 1999.

3.5.5. 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 in 1999:

- Døndalen;
- Various markets/flea markets;
- Various towns.

Table 3-31: Visits to heritage attractions

Attraction	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1232
Hammershus Castle	34	55	74	50	60
Hammershus exhibition	6	28	26	14	21
Østerlars round church	16	36	57	33	43
Other churches	24	35	59	32	44

Table 3-32: Visits to natural attractions*Percentages*

Attraction	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1232
Christiansø	6	17	30	11	20
Gardens	5	21	25	10	18
Randkløve Skaar	4	9	14	6	10
Paradisbakkerne	18	22	43	26	32
Ekkodalen	9	29	41	21	30
Rytterknægten	11	24	38	19	27
Helligdomsklipperne	14	37	55	30	41
Jons Kapel	13	23	46	27	34

Table 3-33: Visits to museums*Percentages*

Museum	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1232
Bornholms Art Museum	11	24	20	12	17
Bornholms Museum	7	10	15	5	10
Gudhjem Museum	n/a ¹	8	7	4	6
Oluf Høst Museum ³	-	-	12	5	-
Nexø Museum	n/a ¹	8	7	3	6
Martin Andersen Nexø Museum	n/a ¹	5	7	4	5
Defence Museum	n/a ¹	3	6	4	4
Quarry Museum	n/a ¹	12	14	4	10
Farm Museum	n/a ¹	6	13	8	9
Automobile Museum	n/a ¹	5	9	4	6
Erichsens Gaard	n/a ¹	6	9	3	6

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

2. Was not mentioned in the questionnaire in the first two quarters of 1999.

Table 3-34: Visits to craft and other attractions*Percentages*

Attraction	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1232
Glass factory/shop	18	53	73	46	57
Ceramic factory/shop	10	36	53	22	37
Art galleries	8	29	44	16	30
Brændesgårdshaven	n/a ¹	16	26	2	18
Fish smoke house	8	59	78	46	60
Zoo	n/a ¹	1	3	-	2
A lighthouse	9	34	57	26	39

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

3.6. 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

3.6.1. Water based activities

As was the case in 1996, 1997 and 1998 the most popular water based activities in 1999 were going to the beach and swimming in the sea (Table 3-35). In 1999 almost 60% of the visitors went to the beach and 40% went swimming in the sea.

Obviously there are differences between the quarters. The share that went to the beach in 1999 varied from 17% in the first quarter to 79% in the third. The share that went swimming in the sea was 67% in the third quarter. This reflects the island's importance as a beach holiday destination. Swimming in a pool and boat trips were also popular activities in the third quarter of 1999.

3.6.2. Specific activities

To complement water activities such as wind surfing or fishing, visitors were asked whether they had played golf, gone to the trotting races or taken a scenic air flight (Table 3-36). Throughout the period from 1996 - 1999 participation in these specific activities has been small.

There is a tendency to higher participation in golf in 1999 compared with the years 1996 - 1998. In the second and third quarter of 1999 some 9% played golf compared with 3% in 1996 and 4% in 1997 and 1998. This can be seen as a result of the promotion by Destination Bornholm directed towards this market and the publication of a modernized golf brochure in 1999.

3.6.3. Entertainment activities

Many leisure tourists are compulsive shoppers, so it is not surprising that shopping is an important activity (Table 3-37). Throughout 1999 almost 80% of the visitors went shopping. In the second and third quarter more than 85% 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. Some 62% of all the visitors to Bornholm in 1999 ate out during their stay. The share varies between 34% in the first quarter and 75% in the second quarter. Music recitals and going to the cinema were not important activities to the visitors neither in 1996, 1997, 1998 nor 1999.

3.6.4. General recreational activities

Commensurate with the image of Bornholm as a holiday island where life proceeds at a leisurely pace, Table 3-38 indicates that just relaxing and driving around are common

general recreational activities. In 1999 some 81% drove around the island and 87% were just relaxing. Walks on my/our own were also significant in 1999, particularly for visitors in the third quarter.

3.6.5. Other activities

Other activities recorded by visitors in 1999, but only for small numbers, were horse riding, audience at rallies, looking at old houses in the small towns, and participating in various sport arrangements. Some of these activities are related to the summer season only.

Table 3-35: Participation in water based activities

Percentages

Activity	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1232
Going to the beach	17	50	79	44	59
Swimming in the sea	*	26	67	16	40
Swimming in the pool	9	15	27	13	19
Wind surfing	2	1	2	1	2
Boat trips	7	15	24	7	16
Fishing	9	4	6	8	7

Note: 1. * means less than 0.5%

Table 3-36: Participation in specific activities

Percentages

Activity	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1232
Scenic air flight	2	1	2	1	2
Golf	2	12	8	2	6
Trotting races	2	3	6	3	4

Table 3-37: Participation in entertainment activities

Percentages

Activity	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1232
Music recitals	2	4	8	3	5
Going to the cinema	5	5	5	6	5
Eating out	34	75	74	43	62
Shopping	45	88	86	74	79

Table 3-38: Participation in general recreational activities

Percentages

Activity	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	123	254	489	366	1232
Cycling	2	23	38	20	27
Guided coach tour	2	14	13	4	10
Guided walks	2	7	9	7	8
Walks on my/our own	23	57	63	47	54
Just relaxing	68	92	92	83	87
Driving around	60	89	85	78	81

3.7. Transport

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

Findings

3.7.1. Transport mode

By far the most popular mode of transport used for travelling about the island is the car (Table 3-39). This is true throughout the period 1996 - 1999.

Some 84% of all visitors in 1999 used a car (own car, hired car or private car provided by firm or friends) as transport mode. The share varies from 77% in the first and second quarter to 93% in the fourth quarter. In second place comes walking. Almost half of the visitors in 1999 moved around the island on foot

Table 3-39: Transport mode

Transport	<i>Percentages</i>				
	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors¹	111	247	463	355	1176
Public Bus	13	13	57	13	14
Coach Tour	9	2	9	4	7
Taxi	9	5	4	4	5
Car	77	77	83	93	84
Motorbike	0	0	1	1	1
Bicycle	23	15	29	22	23
On foot	38	48	49	45	47
Other	1	8	1	2	1

Note: 1. Percentages will add up to more than 100% because of multiple uses.

3.8. Visitor expenditure

One of the most difficult aspects of the survey was questions to visitors about their expenditure patterns on Bornholm. Overall amounts of expenditure were asked for, including return transport costs from the mainland to the island, 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

3.8.1. Expenditure per person per trip

The expenditure per person per trip reflects the difference between lengths of stay on the island. Visitors in the third quarter stay the longest on average (Table 3-8) and therefore tend to spend the most (Table 3-40). It is also the case that expenditure tends to be higher on a package tour, at an average of DKK 3,114 per person per trip in 1999, than for those travelling under their own arrangements, at an average of DKK 1,949 per person per trip. This reflects the fact that visitors on an inclusive tour are more likely to be using serviced

accommodation (hotels, guesthouses etc.) rather than self-catering (holiday cottages, camp sites etc.).

3.8.2. 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 3-41). Visitors on an inclusive tour spend DKK 402 per person per day while visitors on an independent tour spend DKK 258 per person per day. Overall the visitors to Bornholm spend DKK 276 per person per day.

The level of the expenditure per person per trip and per person per trip per day has been about the same throughout the period 1996 - 1999.

Table 3-40: Expenditure per person per trip

	<i>DKK</i>				
Country	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	85	154	368	285	892
Independent	1,046	1,866	2,229	1,869	1,949
Inclusive	1,867	3,007	3,647	2,148	3,114
All	1,058	2,054	2,442	1,897	2,093

Table 3-41: Expenditure per person per day

	<i>DKK</i>				
Country	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1998	All Year
Base: All Visitors	85	154	368	285	892
Independent	203	271	286	229	258
Inclusive	622	424	426	322	402
All	207	297	309	236	276

3.9. 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

3.9.1. Place to visit for holiday and recreation

As a holiday destination, Bornholm is highly rated by all visitors, without exception in both 1996, 1997, 1998 and 1999. Throughout the period 95% of all visitors regard Bornholm as good/excellent as a destination for holiday.

The visitors in the first quarter of 1999 are most satisfied with Bornholm as a holiday destination while the visitors in the second quarter are less satisfied (although still very satisfied). When it comes to the question concerning value for money the visitors in the second and first quarter proved to be the most satisfied while the visitors in the third quarter are the least satisfied. Throughout 1999 almost none of the visitors was dissatisfied (not good enough/poor) with Bornholm as a destination for holiday and only 5% of the visitors were unsatisfied (not good enough/poor) with the value for money.

3.9.2. Likes about Bornholm

The most popular remarks on what visitors like about Bornholm in 1999 were:

- The landscape and nature;
- Quiet, harmony and atmosphere;
- Good walking and bicycle paths;
- Local hospitality and friendliness.

3.9.3. Dislikes about Bornholm

When asking visitors in 1999 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 lack of value for money, lack of maintenance of beaches and nature in general, transport to long/old ferries, and too many places closed outside the main season. 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.

3.9.4. Probability of returning

Table 3-44 examines the probability that visitors will return to Bornholm. Throughout the years 1996, 1997, 1998 and 1999 the visitors outside the peak season show the highest likelihood of returning. This has to be seen in connection with the main purpose of visit in those quarters. Outside the main season many visitors come the island to visit friends and relatives or to combine holiday with visiting friends and relatives.

Overall, 47% of the visitors in 1999 replied that they certainly would return to Bornholm. In 1996, 1997 and 1998 the corresponding shares were respectively 42%, 38% and 44%.

3.9.5. 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 3-45. 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.

Table 3-42: Bornholm as a holiday destination

Percentages

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	74	204	445	333	1460
Excellent	76	63	72	71	70
Good	20	31	24	26	26
Average	4	4	4	3	4
Not good enough	0	0	0	0	0
Poor	0	1	*	0	*
Average score ²	4.72	4.57	4.68	4.68	4.65

Notes: 1. The range was *excellent*=5 to *poor*=1.

2. * means less than 0.5%

Table 3-43: Value for money

Percentages

Evaluation	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	63	180	394	279	930
Excellent	35	38	28	29	30
Good	37	36	37	35	36
Average	24	23	29	31	29
Not good enough	5	2	5	4	4
Poor	0	1	1	1	1
Average score ¹	4.02	4.08	3.87	3.87	3.92

Note: 1. The range was *excellent*=5 to *poor*=1.

Table 3-44: Probability of returning

Percentages

Probability	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	77	208	437	337	1086
Certain	66	50	31	59	47
Likely	18	29	32	23	27
Maybe	16	16	29	12	20
Unlikely	0	4	8	5	5
Certainly not	0	1	1	1	1

Table 3-45: Timing of return by country

Percentages

Timing ¹	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: All Visitors	62	107	209	113	491
This year	95	76	32	57	61
Next year	82	75	59	85	73
Next 2 years	100	68	59	78	67
Next 5 years	86	65	58	69	63

Note: 1. The answers refer to *certain* and *likely* only as percentages of all respondents.

4. Bornholm residents

This part of the report covers the Bornholm residents leaving Bornholm by ferry in the period January - December 1999. The residents answered a number of questions in the screening procedure concerning their border destination, purpose of trip and party size.

4.1. Characteristics of Bornholm residents

Findings

4.1.1. Border destination

In both 1996, 1997, 1998 and 1999 more than 60% of the residents stated their destination as somewhere in Denmark and more than one fifth mentioned somewhere in Sweden (Table 4-1).

While looking at the quarters it appears that Denmark as a destination was most noticeable in the second half of 1999. In the second half of 1999 some 76% of the residents had some place in Denmark as their destination. In the first half of 1999 relatively many of the residents were leaving to a destination in Sweden.

If the results from 1999 are compared with the results from 1996 - 1998 it is seen that the share of residents going to Sweden in the second half of the year has declined remarkably. This reflects the annulment of the duty-free sale on the ferry between Denmark and Sweden by the first of July 1999.

4.1.2. Purpose of trip

Table 4-2 shows purpose of trip among residents in 1999. The main purpose for the residents was visiting friends and relatives.

Once again the effect of the annulment of the duty-free sale is seen. In the first half of 1999 some 27% of the residents were on a day trip compared with 3% in the second half of 1999. In the fourth quarter of 1999 only 3% of the residents were day visitors compared with more than 30% in the fourth quarter of 1996, 1997 and 1998.

4.1.3. Party size

Party size analysis is shown in Table 4-3. In the first three month of 1999 almost half of the residents were travelling alone. Among the residents in the second quarter 34% were travelling alone. In the third and fourth quarter of 1999 about 34% mentioned a party size consisting of two persons.

Overall, average party size in 1999 was 2.75 persons. The party size was lowest in the third quarter (2.25) and highest in the fourth quarter (3.11).

Table 4-1: Residents by border destination*Percentages*

Destination	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: Residents	293	391	139	233	1056
Denmark	71	61	76	76	69
Sweden	25	32	14	9	22
Germany	1	5	3	9	5
Norway	*	*	4	1	1
Others	2	2	3	5	3

Note: 1. * means less than 0.5%

Table 4-2: Residents by purpose*Percentages*

Purpose	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: Residents	296	392	137	233	1058
Business conference/meeting/exhibition	2	*	7	6	3
General business	8	8	12	6	7
Holiday	6	14	23	19	14
Holiday/VFR	25	5	5	6	11
VFR solely	8	30	34	34	26
Sporting event	3	1	2	2	2
Education	6	5	1	0	4
Hospital	1	0	4	2	1
Party	11	4	3	13	8
Day Visit	24	29	3	3	18
Other ¹ (including above combinations)	6	3	6	9	6

Notes: 1. Including wedding, party, funeral etc.
 2. * means less than 0.5%

Table 4-3: Residents by party size*Percentages*

Party Size	1st Qtr 1999	2nd Qtr 1999	3rd Qtr 1999	4th Qtr 1999	All Year
Base: Residents	299	399	146	233	1077
1	47	34	41	43	39
2	24	26	34	34	28
3	12	15	12	9	12
4	7	14	6	10	10
5	5	5	3	*	4
6	1	3	1	1	1
More than 6	4	3	3	3	6
Average (persons)	2.55	2.65	2.25	3.11	2.75

Note: 1. * means less than 0.5%.

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