

**Working paper nr. 9**

# **Survey of Visitors to Bornholm**

**January - December 2000**

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## Preface

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).

In July 1995 the Research Centre of Bornholm began conducting a survey among visitors to Bornholm departing. 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. During the first year people departing by ferry and plane were interviewed. Since July 1996 only people departing by ferry have been interviewed.

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 for five and a half year (since July 1995) 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.

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

Henning Bender  
February 2001



## Contents

1. Survey design .....	9
1.1. The composition of the report.....	9
1.2. Survey methodology .....	9
1.3. The year 2000 .....	9
1.4. Acknowledgements.....	10
2. Number of visitors and visitors nights.....	11
3. Profile and characteristics of visitors.....	13
3.1. Profile and characteristics of visitors .....	13
Findings .....	13
3.1.1. Key markets .....	13
3.1.2. Type of visit .....	13
3.1.3. Purpose of visit .....	14
3.1.4. Party composition and party size .....	14
3.1.5. Length of stay .....	14
3.1.6. Socio-economic characteristics.....	14
3.2. Awareness and influences on the decision to visit Bornholm .....	18
Findings .....	18
3.2.1. Visit to Bornholm as a child .....	18
3.2.2. Source of information .....	18
3.2.3. Attractiveness of Bornholm as a destination .....	19
3.3. Organisation of the visit.....	20
Findings .....	20
3.3.1. Booking arrangements .....	20
3.3.2. Tourist information centre usage .....	21
3.4. Accommodation usage and evaluation .....	21
Findings .....	22
3.4.1. Type of accommodation .....	22
3.4.2. Evaluation of accommodation .....	22
3.5. Visits to attractions .....	25
Findings .....	26
3.5.1. Heritage attractions .....	26
3.5.2. Natural attractions.....	26
3.5.3. Museums.....	26
3.5.4. Craft and other attractions.....	26
3.5.5. Additional attractions visited .....	26
3.6. Activities undertaken by visitors .....	28
Findings .....	28
3.6.1. Water based activities .....	28
3.6.2. Specific activities .....	28
3.6.3. Entertainment activities .....	28
3.6.4. General recreational activities.....	29
3.6.5. Other activities .....	29
3.7. Transport.....	30
Findings .....	30
3.7.1. Transport mode .....	30
3.8. Visitor expenditure.....	30
Findings .....	31
3.8.1. Expenditure per person per trip.....	31
3.8.2. Expenditure per person per day .....	31
3.9. Bornholm as a visitor destination .....	31

Findings .....	32
3.9.1. Place to visit for holiday and recreation .....	32
3.9.2. Likes about Bornholm.....	32
3.9.3. Dislikes about Bornholm .....	32
3.9.4. Probability of returning.....	32
3.9.5. Possible time of return .....	32
4. Bornholm residents.....	35
4.1. Characteristics of Bornholm residents .....	35
Findings .....	35
4.1.1. Border destination.....	35
4.1.2. Purpose of trip.....	35
4.1.3. Party size.....	35
References .....	37

## Figures and tables

Figure 2-1: Number of visitors and visitor nights .....	12
---	----

Table 1-1: Sample (departing by ferry) .....	10
Table 2-1: Number of visitors and visitor nights (in thousands) .....	12
Table 3-1: Visitors by country of residence .....	15
Table 3-2: Visitors by type of visit .....	15
Table 3-3: Visitors by number of visits .....	15
Table 3-4: Visitors by last visit .....	15
Table 3-5: Visitors by purpose .....	16
Table 3-6: Visitors by party composition .....	16
Table 3-7: Visitors by party size .....	16
Table 3-8: Visitors by length of stay .....	16
Table 3-9: Respondents' occupation .....	17
Table 3-10: Spouses' occupation .....	17
Table 3-11: Respondents' education .....	17
Table 3-12: Respondents' age .....	18
Table 3-13: Visitors' gross family income per annum .....	18
Table 3-14: Visited as a child .....	19
Table 3-15: Finding out about Bornholm .....	19
Table 3-16: Aspects of Bornholm .....	20
Table 3-17: Aspects of Bornholm assessed as very important .....	20
Table 3-18: Booking arrangements .....	21
Table 3-19: Tourist information centre usage .....	21
Table 3-20: Accommodation usage .....	23
Table 3-21: Evaluation of accommodation .....	23
Table 3-22: Quality of accommodation .....	23
Table 3-23: Quality of location .....	24
Table 3-24: Quality of facilities .....	24
Table 3-25: Quality of decor .....	24
Table 3-26: Cleaning standard .....	24
Table 3-27: Quality of food and beverages .....	25
Table 3-28: Quality of service .....	25
Table 3-29: Price level .....	25
Table 3-30: Overall value for money .....	25
Table 3-31: Visits to heritage attractions .....	27
Table 3-32: Visits to natural attractions .....	27
Table 3-33: Visits to museums .....	27
Table 3-34: Visits to craft and other attractions .....	28
Table 3-35: Participation in water based activities .....	29
Table 3-36: Participation in specific activities .....	29
Table 3-37: Participation in entertainment activities .....	29
Table 3-38: Participation in general recreational activities .....	30
Table 3-39: Transport mode .....	30
Table 3-40: Expenditure per person per trip .....	31
Table 3-41: Expenditure per person per day .....	31
Table 3-42: Bornholm as a holiday destination .....	33
Table 3-43: Value for money .....	33
Table 3-44: Probability of returning .....	33
Table 3-45: Timing of return by country .....	33
Table 4-1: Residents by border destination .....	35

Table 4-2: Residents by purpose ..... 36

Table 4-3: Residents by party size..... 36

# **1. Survey design**

## **1.1. The composition of the report**

The report is divided into four chapters. This 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 - 2000. The third section describes the visitors departing by ferry in the period January - December 2000. 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.

## **1.2. Survey methodology**

Enclosed as Appendix I is the questionnaire concerning sea departures in 2000. The questionnaires were made up in five different languages (Danish, Swedish, German, English and Polish). 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 Sassnitz. The length of the questionnaire and terminal arrangements make it necessary for the interviewers to conduct the survey on the ferries. 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.

## **1.3. The year 2000**

This report covers a representative sample of the tourists and the residents leaving Bornholm by ferry in the period 1 January - 31 December 2000. During the summer of 2000 a new bridge (Øresundsbroen) between Zealand and Sweden was opened on 1 July and a fast ferry between Ystad (Sweden) and Rønne (Bornholm) was taken into use in May. This means that the travel time between Rønne and Copenhagen is almost halved from five to two and a half hour.

The frequency tables in the report are based on the statistics shown in table A. Over the year 2,597 visitor questionnaires were collected, with a wastage rate of just below 4% together with 1,135 screen responses containing basic information about trip movements of the residents of Bornholm. Overall, some 70% of the sample was visitors. Some 53% of the contacts were male and 47% female.

**Table 1-1: Sample (departing by ferry)**

	<b>1st Qtr 2000</b> <b>510</b>		<b>2nd Qtr 2000</b> <b>718</b>		<b>3rd Qtr 2000</b> <b>1,627</b>		<b>4th Qtr 2000</b> <b>1,877</b>		<b>All Year</b> <b>3,731</b>	
	Base	%	Base	%	Base	%	Base	%	Base	%
<b>Visitors</b>	240	47	508	71	1,398	86	451	51	2,597	70
<b>Residents</b>	270	53	210	29	229	14	425	49	1,134	30

In chapter 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.

## **1.4. 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.

During 2000, three interviewers, Hanne Nimskov, Kiss Knak and Malene Riis, were involved in collecting data and the data processing. Johnny Rassing has been responsible for the data processing, mainly the control of the database. The author has made the tables in the report and taken care also of the overall planning of schedules and other administrative duties in regard to the survey.

## 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:

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

Table 2-1 shows the results of the calculations.

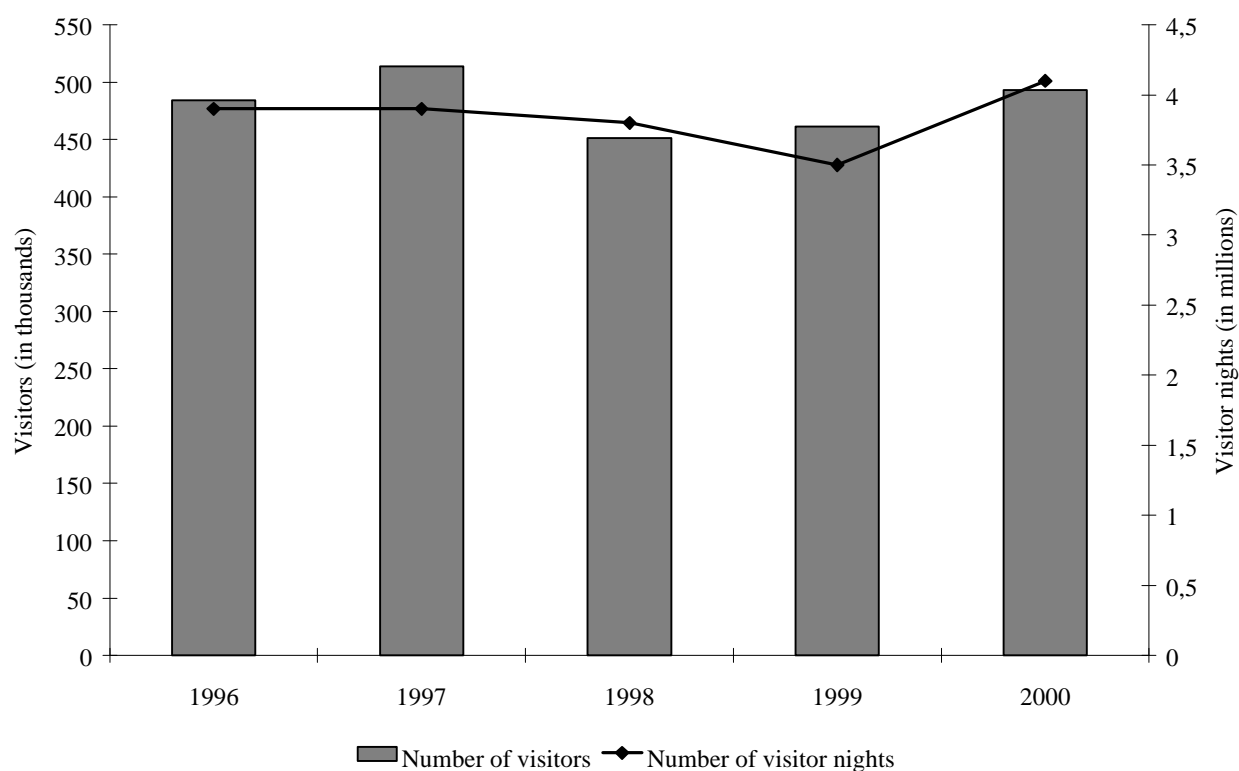
**Table 2-1: Number of visitors and visitor nights (in thousands)**

	1996	1997	1998	1999	2000 <sup>1</sup>
Average length of stay	8.0	7.6	8.3	7.8	8.4
Number of visitors	484	514	451	461	493
Number of visitor nights	3,900	3,900	3,800	3,500	4,100

Note: 1. The number of passengers for the fourth quarter of 2000 is estimated in the light of the passenger flow in previous years and the development in the number of passengers in the third quarter of 2000 after the fast ferry was taken into use.

In the period 1996 to 1998 the total number of visitor nights on Bornholm was about the same level. In 1999 the number of visitor nights declined but in 2000 the number went up again to the highest level in the period observed.

**Figure 2-1: Number of visitors and visitor nights**



In 2000 the total number of visitors turned out to be above the level in 1996, 1998 and 1999 but still below the level of 1997. The average length of stay has increased in 2000 to the highest level observed. Overall Bornholm experienced an increase in the number of visitors and visitor nights in 2000 compared with 1998 and 1999. Especially the increase in the number of visitors was expected as a consequence on the new bridge between Zealand and Sweden and the faster ferry connection between Sweden and Bornholm.

### **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 - December 2000 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**

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 1995-1999 it becomes evident that the key markets have not changed. The key markets for the Bornholm are still the rest of Denmark, Germany and Sweden. This was true for all quarters of 2000 (Table 3-1). Overall, some 57% of the visitors in 2000 were from the rest of Denmark. This is above the share in previous years. The share varies between 53% in the second quarter of 2000 to 70% in the fourth quarter as a result of the many people travelling to visit friends and relatives during Christmas Time.

Sweden and Germany 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. Throughout the year Germans account for 26% of the visitors to the island and the Swedes account for 13%. The Germans share of all visitors is almost constant throughout the year while the Swedes mainly visit Bornholm in the first three quarters. In the first half of 2000 some 14% of the visitors to Bornholm were from Sweden. In 1999 the corresponding share was 24%. The decline can be seen as a result of the annulment of the tax-free sale between Ystad (Sweden) and Rønne (Bornholm). In the second half of 2000 Swedes accounted for 12% of the visitors compared with 8% in 1999. This increase can be seen as a result of the now fast ferry connection between Ystad and Rønne.

#### **3.1.2. Type of visit**

About 78% of the visitors interviewed during 2000 had been to Bornholm before (Table 3-2). This tendency was also the case in 1996, 1997, 1998 and 1999. The greater part of the repeat visitors (68%) are from Denmark, 18% are from Germany and 11% are from Sweden. Clearly, Bornholm has a regular repeat following, with strong loyalty to the product. This fact is illustrated in Table 3-3 and Table 3-4.

Outside the peak season about half of the visitors have been to the island more than 20 times before and even in the peak season the share is 40%. Throughout 2000 more than 60% of the tourists had been to Bornholm more than 5 times before. The share increases to 73% in the fourth quarter. This pattern has been the same during the surveyed period from 1996 to 2000 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 people visiting Bornholm are going on holiday (Table 3-5). This is true of all quarters. Also people on holiday while visiting friends and relatives are important for the tourism on the island together with people travelling solely to visit friends and relatives.

Overall, 55% of visitors in 2000 gave the purpose of their trip to Bornholm as *holiday*. This is the lowest number observed until now and just below the level of 1999. In 1996, 1997 and 1998 the corresponding shares were respectively 59%, 67% and 61%.

### **3.1.4. Party composition and party size**

Visitors were asked about whom they are travelling with (Table 3-6). Adult couples and families with children below 15 years form the core of the market. This keeps average party size to just above 3 persons (Table 3-7). Average party size is below the level in 1999 but still above the level in 1995, 1996, 1997 and 1998.

There are some differences in the average party size throughout the year. Typically average party size is higher during the third quarter when families travel together on holiday. In this period average party size in 2000 was 3.58 while the average party size in the other quarters were below three 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**

Visitors to Bornholm in the third quarter of 2000 stayed on average for 8.83 days. These visitors stayed more than three days longer than the visitors in the first quarter (Table 3-8). Throughout the year 2000 the average length of stay was 7.73 days. The average length of stay declined from 1996 – 1999 but increased a bit from 1999 to 2000.

In the second half of 2000 about 26% of the visitors to Bornholm stayed for less than 8 days on the island. The corresponding share in the second half of 1999 was 19%, in 1998 it was 14%, in 1997 it was 13% and in 1996 the share was 11%. This indicates that the new bridge between Zealand and Sweden and the fast ferry between Sweden and Bornholm has caused an increase in the short break market as was also expected.

### **3.1.6. Socio-economic characteristics**

Occupational characteristics of respondents in the period July 1995 - December 2000 covered are principally professional, managerial and administrative. This is reflected in the relatively high education level among the visitors (Table 3-11). 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***Percentages*

Country	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>240</b>	<b>507</b>	<b>1,398</b>	<b>450</b>	<b>2,595</b>
Denmark	60	53	54	70	57
Sweden	13	15	14	6	13
Germany	25	28	26	23	26
Norway	1	3	4	*	3
Others	1	1	2	1	1

Note: \* means less than 0.5%

**Table 3-2: Visitors by type of visit***Percentages*

Visit	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>231</b>	<b>489</b>	<b>1,362</b>	<b>429</b>	<b>2,511</b>
First	14	22	25	15	22
Repeat	86	78	75	85	78

**Table 3-3: Visitors by number of visits***Percentages*

Previous Visits	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: Repeat Visit</b>	<b>200</b>	<b>425</b>	<b>1,199</b>	<b>373</b>	<b>2,197</b>
1	9	11	16	5	12
2	11	10	11	8	10
3	7	5	8	5	7
4	4	4	5	3	4
5	3	4	4	5	4
6-10	11	10	10	12	10
11-20	10	6	6	11	7
More than 20	45	50	40	51	46

**Table 3-4: Visitors by last visit***Percentages*

Last Visit	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: Repeat Visit</b>	<b>225</b>	<b>469</b>	<b>1,273</b>	<b>415</b>	<b>2,382</b>
First visit	14	23	24	13	21
Earlier this year	18	22	15	57	24
Last year	44	26	18	11	21
Within last 2 years	11	6	7	5	7
Within last 5 years	3	7	10	5	8
More than 5 year	10	16	27	9	20

**Table 3-5: Visitors by purpose***Percentages*

Purpose	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>230</b>	<b>485</b>	<b>1,369</b>	<b>430</b>	<b>2,514</b>
Business or other work	11	10	4	12	7
Holiday	29	49	68	33	55
Holiday/VFR	19	19	14	22	17
VFR solely	23	9	6	19	11
Sport event	3	1	2	3	2
Education	0	2	*	1	1
Other (including above combinations)	15	10	6	10	7

Note: 1. \* means less than 0.5%

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

Party Composition	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>231</b>	<b>485</b>	<b>1,365</b>	<b>430</b>	<b>2,511</b>
Travelling alone	25	14	9	24	14
Husband/wife/partners only	29	36	40	26	36
Family group: children under 15	20	15	25	20	22
Family group: children grown up	2	7	7	7	6
Family relations/friends	4	5	5	4	5
Friend/friends	11	13	7	7	8
Other	9	10	7	12	9

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

Party Size	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>237</b>	<b>508</b>	<b>1,398</b>	<b>449</b>	<b>2,492</b>
1	32	22	10	28	18
2	33	43	43	35	41
3	14	12	14	14	13
4	15	14	19	14	17
5	1	6	7	4	5
More than 5	5	3	7	5	6
Average (persons)	2.70	2.86	3.58	2.98	3.26

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

Period	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>230</b>	<b>486</b>	<b>1,366</b>	<b>431</b>	<b>2,513</b>
Day visit	13	7	4	13	7
Short stay <sup>1</sup>	34	25	16	30	22
Up to one week	36	44	42	43	42
One - two weeks	13	20	27	11	22
Two - three weeks	3	2	7	2	5
More than three weeks	1	2	4	1	2
Average (days)	5.56	6.49	8.86	6.74	7.73

Note: 1. Up to three days.

**Table 3-9: Respondents' occupation***Percentages*

Occupation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>166</b>	<b>346</b>	<b>1,131</b>	<b>355</b>	<b>1,998</b>
Self-employed	11	7	8	11	8
Professional and managerial	15	28	24	22	24
Administrative	34	37	23	25	27
Clerical	4	7	8	5	7
Skilled/unskilled wage earner	16	10	16	16	15
Assisting spouse	1	2	*	*	1
Employment not specified	1	0	0	0	*
Retired	13	5	15	11	12
Student	5	4	5	10	6
Economically inactive <sup>1</sup>	0	0	1	0	*

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

**Table 3-10: Spouses' occupation***Percentages*

Occupation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>106</b>	<b>228</b>	<b>882</b>	<b>228</b>	<b>1,444</b>
Self-employed	4	8	5	5	6
Professional and managerial	12	29	16	18	18
Administrative	37	33	28	28	29
Clerical	1	10	9	8	9
Skilled/unskilled wage earner	23	14	23	13	20
Assisting spouse	9	1	1	4	2
Employment not specified	1	0	*	0	*
Retired	9	3	11	11	10
Student	3	2	3	6	3
Economically inactive <sup>1</sup>	1	0	4	7	3

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

**Table 3-11: Respondents' education***Percentages*

Education	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>182</b>	<b>399</b>	<b>1,147</b>	<b>361</b>	<b>2,089</b>
Up to 9 years	20	15	15	19	16
9 – 12 years	29	24	22	22	23
12 years + vocational	32	31	30	28	30
12 years + academic	19	30	33	31	31

**Table 3-12: Respondents' age***Percentages*

Age	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	200	463	1,257	397	2,317
16 - 24 years	6	5	3	9	5
25 - 34 years	15	18	14	18	16
35 - 49 years	41	30	36	35	35
50 - 59 years	25	26	28	22	26
60 - 69 years	10	13	13	12	13
Over 69 years	5	8	6	4	6

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

Family Income	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	173	381	1,072	346	1,972
Less than 200,000 DKK	19	17	12	16	14
200,000 - 400,000 DKK	40	40	41	36	40
400,000 - 700,000 DKK	30	32	36	34	34
Greater than 700,000 DKK	11	12	11	14	12

## 3.2. Awareness and influences on the decision to visit Bornholm

Visitors were asked about the extent of their awareness of and how they found out about Bornholm. 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 the respondents who had been to the island before. More than half of the visitors in the first and fourth quarter had been to the island when they were children (Table 3-14). This reflects the great number of Danish visitors in these quarters and the tendency is true for all of the surveyed the period 1996-2000.

Some 13% of the visitors to Bornholm in 2000 had visited the island before with their school. Overall, 48% of the visitors in had been to Bornholm as a child. This share varies between 56% in the fourth quarter and 45% in the third which is the largest number observed.

### 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 are the most important items.

### 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 surveyed period July 1995 - December 2000 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. Throughout 2000 some 64% found the nature on the island very important for their decision to visit; only 4% mention golf courses as very important.

Other aspects of Bornholm that were considered very important by the visitors in 2000 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;
- Own holiday cottage on the island;
- A possibility to combine work and holiday.

**Table 3-14: Visited as a child**

*Percentages*

As child	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: Repeat Visits</b>	<b>228</b>	<b>471</b>	<b>1,315</b>	<b>415</b>	<b>2,429</b>
No	45	55	55	44	52
Lived on Bornholm as a child	15	13	5	14	9
With family/friends	15	12	11	15	12
With/visit family/friends	4	3	2	4	3
With school	13	10	14	12	13
With club/association	2	1	2	1	2
With above combinations	6	6	11	10	9

**Table 3-15: Finding out about Bornholm**

*Percentages*

Information Source	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>134</b>	<b>241</b>	<b>700</b>	<b>222</b>	<b>1,297</b>
Always known	56	47	50	49	50
Family/friends on Bornholm	38	26	21	35	26
Newspaper/magazine ad.	5	8	8	5	7
Poster	4	3	3	3	3
Newspaper/magazine article	4	7	8	4	7
Travel agent	2	5	3	3	3
Club/association	4	4	3	3	3
Military	3	3	2	4	3
Recommended by family/friends	19	22	32	19	27
Guide book/brochure	8	9	9	7	9
TV ad. or programme	3	3	4	2	3
Radio	*	1	1	1	1
Travel show/exhibition	2	2	1	*	1
Other <sup>3</sup>	5	5	7	4	6

- Notes:
1. Percentages can add up to more than 100% because of multiple choices.
  2. \* means less than 0.5%.
  3. Includes the Internet.

**Table 3-16: Aspects of Bornholm**

Evaluation	1st Qtr 2000		2nd Qtr 2000		3rd Qtr 2000		4th Qtr 2000		All Year	
Base: All Visitors	176		373		1,174		336		2,059	
	Score	Ranking	Score	Ranking	Score	Ranking	Score	Ranking	Score	Ranking
Family/friends on Bornholm	3.03	3	2.56	8	2.10	12	2.95	4	2.42	9
Beaches	2.65	5	2.79	5	2.85	5	2.65	6	2.79	5
Landscape	3.27	2	3.53	2	3.50	2	3.32	2	3.46	2
Cycle routes	2.22	9	2.37	10	2.33	9	2.15	10	2.30	10
Walking	2.55	7	2.70	7	2.52	7	2.61	7	2.57	7
Fishing towns	2.86	4	3.02	4	3.12	4	2.84	5	3.04	4
Nature	3.37	1	3.59	1	3.57	1	3.38	1	3.52	1
Golf courses	1.28	13	1.36	14	1.20	14	1.30	14	1.25	14
Fishing	1.58	12	1.58	13	1.33	13	1.55	13	1.43	13
Cultural history	2.58	6	2.71	6	2.73	6	2.51	8	2.68	6
Restaurants	2.08	11	2.26	11	2.29	11	2.01	12	2.22	12
Craft/art workers	2.24	8	2.44	9	2.50	8	2.33	9	2.44	8
Atmosphere	3.27	2	3.47	3	3.48	3	3.19	3	3.42	3
Variety of activities	2.10	10	2.25	12	2.32	10	2.10	11	2.25	11

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

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

Features	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: Holidaymakers	176	373	1,174	336	2,059
Friends/family on Bornholm	58	44	29	56	39
Beaches	29	32	30	30	30
Landscape	50	63	58	58	58
Cycle routes	16	22	20	15	19
Walking	21	27	18	23	21
Fishing towns	27	31	35	30	33
Nature	57	68	63	63	64
Golf courses	4	8	3	4	4
Fishing	10	9	4	9	6
Cultural history	20	20	19	16	19
Restaurants	10	13	10	9	10
Craft/art workers	9	13	12	11	12
Atmosphere	49	58	57	48	55
Variety of activities	9	12	14	11	13

### 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 2000 reported that they were most likely to book transport directly with the carrier (Table 3-18). Some 73% booked the transport directly with the carrier, which is on the same level as in 1999. When it comes to accommodation booking arrangements 35% booked directly with the landlord/proprietor and 28% booked accommodation through a travel agent. Visitors using a travel agent tend to use one near their home.

There are some differences between the four quarters. Especially in the first and fourth quarter of 2000 many visitors stayed with friends and relatives meaning they did not have to book accommodation 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 is host for many hotels and guesthouses 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 holidaymakers who are expected to have the greatest need for information.

**Table 3-18: Booking arrangements**

*Percentages*

Information Centre	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	165	348	980	322	1,815
Booked transport directly with the carrier	80	76	71	71	73
Booked transport through travel agent	33	41	42	36	40
Company took care of the bookings	11	8	4	11	7
Family/friends booked transportation	12	3	4	6	5
Booked accommodation directly with the landlord	26	28	44	17	35
Booked accommodation through a travel agent	22	35	28	26	28
Staying with friends and relatives	55	39	29	57	39
Family/friends booked accommodation	17	8	4	11	7
Bought a package tour from a travel agent	6	21	21	10	18
Used a travel agent near home	14	23	22	17	20
Used a travel agent in Bornholm	7	13	13	5	11
Booked through holiday cottage booking agency on Bornholm	3	7	8	7	7
Booked holiday cottage through agency elsewhere	3	6	5	6	5
Travel with club/association	3	7	6	3	5

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

**Table 3-19: Tourist information centre usage**

*Percentages*

Information Centre	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	175	346	993	321	1,835
Aakirkeby	2	3	5	2	4
Gudhjem	1	5	10	4	7
Hasle	1	4	5	2	4
Nexø-Dueodde	4	7	10	7	8
North Bornholm, Allinge	4	7	11	8	9
Rønne, Velkomstcenter	9	11	18	11	15
Svaneke	3	4	8	4	6

## 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 and fourth quarter of 2000 staying with friends and relatives was preferred as type of accommodation (Table 3-20). In the second and third quarter holiday cottages proved to be the most popular type of accommodation used followed by hotels. Hotels together with holiday cottages and staying with friends and relatives account for almost three quarters of the visitors' choice of accommodation.

Throughout the period July 1995 – December 2000 hotels and holiday cottages proved to be 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 2000 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 the previous years. 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 - 2000 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 2000. Overall, the tourists in the first and fourth quarter of 2000 are the most satisfied with all aspects of their accommodation.

**Table 3-20: Accommodation usage***Percentages*

Accommodation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Staying Visitors<sup>1</sup></b>	<b>192</b>	<b>444</b>	<b>1,337</b>	<b>368</b>	<b>2,341</b>
Hotel	24	25	24	14	23
B & B/Private Home	0	1	1	1	1
Farmhouse	1	1	2	2	2
Youth Hostel	2	2	4	1	3
Holiday Centre	1	6	5	4	4
Friends and Relatives	48	25	18	41	25
Holiday cottage	14	27	25	27	25
Camping	2	4	9	1	6
Caravan	*	2	7	*	4
Other	8	9	6	9	7

Notes: 1. The base includes multiple accommodation use.

2. \* means less than 0.5%.

**Table 3-21: Evaluation of accommodation**

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Average Score<sup>1</sup></b>	<b>88</b>	<b>260</b>	<b>887</b>	<b>184</b>	<b>1,419</b>
<b>Base: All Visitors</b>					
Accommodation	4.30	4.21	3.99	4.25	4.07
Location	4.43	4.40	4.30	4.44	4.35
Facilities	4.01	3.89	3.73	4.06	3.88
Décor	3.99	3.95	3.86	4.14	3.86
Cleaning Standard	4.17	3.87	3.78	4.02	3.85
Food and beverages	4.23	4.26	4.04	4.23	4.11
Service	4.17	4.20	4.03	4.15	4.08
Price level	3.96	3.73	3.50	3.92	3.62
Overall value for money	3.98	3.86	3.71	4.06	3.80

Note: 1. The range was *excellent*=5 to *poor*=1.**Table 3-22: Quality of accommodation***Percentages*

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>87</b>	<b>255</b>	<b>823</b>	<b>176</b>	<b>1,341</b>
Excellent	46	39	33	45	36
Good	40	38	41	40	40
Average	12	20	22	13	20
Not good enough	2	1	3	1	3
Poor	0	2	2	2	2
Average score <sup>1</sup>	4.30	4.21	3.99	4.25	4.07

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

**Table 3-23: Quality of location***Percentages*

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	88	260	887	183	1,418
Excellent	57	54	48	56	51
Good	32	36	37	34	36
Average	10	9	12	9	11
Not good enough	0	1	3	1	2
Poor	1	1	*	1	1
Average score <sup>1</sup>	4.43	4.40	4.30	4.44	4.35

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 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	81	242	814	173	1,310
Excellent	31	28	22	34	25
Good	44	38	38	42	39
Average	20	31	33	20	30
Not good enough	5	3	6	3	5
Poor	0	1	2	1	1
Average score <sup>1</sup>	4.01	3.89	3.73	4.06	3.88

Note: 1. The range was *excellent*=5 to *poor*=1.**Table 3-25: Quality of decor***Percentages*

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	83	255	847	184	1,369
Excellent	31	29	23	36	26
Good	49	42	40	42	41
Average	11	26	30	20	27
Not good enough	4	3	5	2	4
Poor	5	*	2	0	2
Average score <sup>1</sup>	3.99	3.95	3.86	4.14	3.86

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

2. \* means less than 0.5%.

**Table 3-26: Cleaning standard***Percentages*

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	63	208	750	146	1,167
Excellent	43	32	28	34	30
Good	37	36	36	40	37
Average	18	23	26	21	24
Not good enough	2	8	7	3	6
Poor	2	2	3	2	3
Average score <sup>1</sup>	4.17	3.87	3.78	4.02	3.85

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

**Table 3-27: Quality of food and beverages***Percentages*

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>56</b>	<b>161</b>	<b>554</b>	<b>107</b>	<b>878</b>
Excellent	54	47	37	50	41
Good	29	35	37	32	36
Average	9	16	21	14	19
Not good enough	5	1	3	2	3
Poor	4	1	2	3	2
Average score <sup>1</sup>	4.23	4.26	4.04	4.23	4.11

Note: 1. The range *excellent*=5 to *poor*=1.**Table 3-28: Quality of service***Percentages*

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>70</b>	<b>210</b>	<b>803</b>	<b>143</b>	<b>1,226</b>
Excellent	50	46	35	42	38
Good	30	31	40	36	37
Average	13	20	21	18	20
Not good enough	1	1	3	1	2
Poor	6	1	2	2	2
Average score <sup>1</sup>	4.17	4.20	4.03	4.15	4.08

Note: 1. The range was *excellent*=5 to *poor*=1.**Table 3-29: Price level***Percentages*

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>80</b>	<b>244</b>	<b>808</b>	<b>167</b>	<b>1,299</b>
Excellent	34	25	18	31	22
Good	33	33	29	37	31
Average	28	31	40	27	36
Not good enough	6	9	10	4	9
Poor	0	1	3	1	2
Average score <sup>1</sup>	3.96	3.73	3.50	3.92	3.62

Note: 1. The range was *excellent*=5 to *poor*=1.**Table 3-30: Overall value for money***Percentages*

Evaluation	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>85</b>	<b>248</b>	<b>833</b>	<b>176</b>	<b>1,342</b>
Excellent	34	26	21	33	25
Good	38	40	40	44	41
Average	22	28	29	19	27
Not good enough	4	4	7	3	5
Poor	2	1	3	1	2
Average score <sup>1</sup>	3.98	3.86	3.71	4.06	3.80

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 2000.

## 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 in the previous years surveyed. As would be expected, the visitors in the third quarter, which constitute the bulk of the holiday season, have a high propensity to visit heritage attractions. This should be seen in connection with many first time holidaymakers in the third quarter.

### 3.5.2. Natural attractions

Throughout the period July 1995 - December 2000 natural attractions are also of most significance to tourists in the third quarter. Many tourists visit especially Helligdomsklipperne (48%), Jons Kapel (37%), Ekkodalen (35%) and Paradisbakkerne (35%) in the main season.

The visitor market penetration rates of the natural attractions are lowest in the first quarter where Helligdomsklipperne, which is the most visited natural attraction, is only visited by 22%.

### 3.5.3. Museums

Museums are generally not well attended throughout the period surveyed, the only exceptions being the Bornholms Art Museum and the Oluf Høst Museum. In the third quarter of 2000 Bornholms Art Museum was visited by 22% and the Oluf Høst Museum was visited by 16% of the tourists to Bornholm.

Overall, visitors in the third quarter 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 throughout the period July 1995 – December 2000. 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 66% of the total number of tourists in 2000 visited a smoke house and 62% visited a glass factory/shop.

Mid May year 2000 a new attraction, Natur Bornholm, was opened. In the third quarter the attraction was visited by 41% of the tourists and in the fourth quarter it was visited by 26%.

### 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;
- Butterfly park in Nexø;
- Dueodde beach;

- Sweet factory in Svaneke;
- Various markets/flea markets;
- Various towns.

**Table 3-31: Visits to heritage attractions**

*Percentages*

Attraction	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>230</b>	<b>485</b>	<b>1,369</b>	<b>429</b>	<b>2,513</b>
Hammershus Castle	44	58	71	43	62
Hammershus exhibition	7	15	23	9	18
Østerlars round church	16	36	51	26	41
Other churches	18	35	46	29	39

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

*Percentages*

Attraction	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>230</b>	<b>485</b>	<b>1,369</b>	<b>429</b>	<b>2,513</b>
Christiansø	3	18	24	5	19
Gardens	4	17	23	10	18
Randkløve Skaar	3	3	7	8	6
Paradisbakkerne	15	28	35	18	29
Ekkodalen	18	28	36	17	30
Rytterknægten	15	25	31	18	27
Helligdomsklipperne	22	40	48	29	42
Jons Kapel	16	27	37	23	31

**Table 3-33: Visits to museums**

*Percentages*

Museum	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>230</b>	<b>485</b>	<b>1,369</b>	<b>429</b>	<b>2,513</b>
Bornholms Art Museum	12	16	22	13	19
Bornholms Museum	10	8	10	4	9
Gudhjem Museum	n/a <sup>1</sup>	4	7	3	5
Oluf Høst Museum	n/a <sup>1</sup>	10	16	6	12
Nexø Museum	n/a <sup>1</sup>	4	4	3	4
Martin Andersen Nexø Museum	n/a <sup>1</sup>	3	6	4	5
Defence Museum	n/a <sup>1</sup>	1	3	2	2
Quarry Museum	n/a <sup>1</sup>	7	10	4	8
Farm Museum	n/a <sup>1</sup>	4	8	8	7
Automobile Museum	n/a <sup>1</sup>	4	8	4	6
Erichsens Gaard	n/a <sup>1</sup>	4	6	2	5

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

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

Attraction	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>230</b>	<b>485</b>	<b>1,369</b>	<b>429</b>	<b>2,513</b>
Glass factory/shop	23	56	74	43	62
Ceramic factory/shop	9	33	48	20	38
Art galleries	6	25	45	10	33
Joboland Brændesgårdshaven	n/a <sup>1</sup>	15	28	n/a <sup>1</sup>	19
Fish smoke house	17	63	81	36	66
Natur Bornholm <sup>2</sup>	-	-	41	26	38
A lighthouse	14	34	45	32	39

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

2. Was not mentioned in the questionnaire in the first two quarters of 2000. The attraction opened in May 2000.

### 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 also was the case in the previous years the most popular water based activities in 2000 was going to the beach (Table 3-35). In 2000 more than 60% of the visitors went to the beach. Especially in the third quarter swimming in the sea is also an important water based activity. More than half of the visitors in the third quarter went swimming in the sea.

Obviously there are differences between the quarters. The share that went to the beach in 2000 varied from 24% in the first quarter to 74% in the third. This reflects the island's importance as a beach holiday destination. The share that went swimming in the sea was 52% in the third quarter of 2000 compared with 67% in the third quarter of 1999. This has to be seen as a result of the cold summer in year 2000 compared with 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 July 1995 – December 2000 participation in these specific activities has been small.

There has been a tendency to higher participation in golf and fishing in 1999 and 2000 compared with the years 1996 - 1998. This can be seen as a result of the promotion by Destination Bornholm directed towards these specific markets and the publication of modernised brochures in 1999.

### 3.6.3. Entertainment activities

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 an important form of

entertainment (Table 3-37). Overall 66% of all the visitors to Bornholm in 2000 ate out during their stay. The share varies between 33% in the first quarter and 78% in the third quarter.

Many leisure tourists are compulsive shoppers, so it is not surprising that shopping is an important activity. In the third quarter of 2000 almost 90% of the visitors went shopping. Music recitals and going to the cinema were not important activities to the visitors neither in 1996, 1997, 1998, 1999 nor 2000.

### 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 2000 some 83% drove around the island and 88% were just relaxing. Walks on my/our own were also significant, 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 and audience at rallies. Some of these activities are related to the summer season only.

**Table 3-35: Participation in water based activities**

*Percentages*

Activity	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	230	485	1,369	429	2,513
Going to the beach	24	55	74	37	61
Swimming in the sea	3	20	52	6	36
Swimming in the pool	6	16	26	9	20
Wind surfing	0	2	1	0	1
Boat trips	4	14	22	3	16
Fishing	13	10	7	8	8

**Table 3-36: Participation in specific activities**

*Percentages*

Activity	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	230	485	1,369	429	2,513
Scenic air flight	2	2	3	0	2
Golf	2	9	5	3	5
Trotting races	0	4	6	4	5

**Table 3-37: Participation in entertainment activities**

*Percentages*

Activity	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	230	485	1,369	429	2,513
Music recitals	1	4	10	3	7
Going to the cinema	4	1	3	4	3
Eating out	33	63	78	42	66
Shopping	60	76	89	67	81

**Table 3-38: Participation in general recreational activities***Percentages*

Activity	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	230	485	1,369	429	2,513
Cycling	8	25	36	14	28
Guided coach tour	1	13	11	4	9
Guided walks	3	16	14	7	12
Walks on my/our own	36	49	54	42	50
Just relaxing	62	86	93	81	88
Driving around	71	82	87	76	83

### 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 has been true throughout the period July 1995 – December 2000.

Throughout 2000 some 90% of all visitors (own car, hired car or private car provided by firm or friends) as transport mode. The share varies from 86% in the third quarter to 99% in the fourth quarter. The share of people using a car to move around the island has increased in 2000 and can be seen as a result of the new bridge (Øresundsbroen) between Zealand and Sweden.

**Table 3-39: Transport mode***Percentages*

Transport	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors <sup>1</sup>	215	446	1,320	388	2,369
Public Bus	11	11	10	10	10
Coach Tour	3	9	6	2	6
Taxi	6	3	2	4	3
Car	97	92	86	97	90
Motorbike	0	1	1	*	1
Bicycle	15	26	34	20	28
On foot	24	23	25	26	25
Other	1	0	1	2	1

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

2. \* means less than 0.5%

### 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). In the fourth quarter visitors to Bornholm spend DKK 1,555 on average compared with 2,578 in the third quarter.

### 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 on average DKK 386 per person per day while visitors on an independent tour spend on average DKK 293 per person per day. Overall the visitors to Bornholm spend DKK 303 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 surveyed from July 1996 to December 2000.

**Table 3-40: Expenditure per person per trip**

**DKK**

Country	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	230	485	1,369	429	2,513
Independent	294	286	303	250	293
Inclusive	234	321	453	291	386
All	285	293	316	253	303

**Table 3-41: Expenditure per person per day**

**DKK**

Country	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
Base: All Visitors	230	485	1,369	429	2,513
Independent	1,585	1,643	2,573	1,511	2,156
Inclusive	1,363	1,560	2,615	1,586	2,106
All	1,555	1,626	2,578	1,517	2,149

## 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 very highly rated by all visitors, without exception throughout the period July 1995 to December 2000. Throughout the period 95% of all visitors regard Bornholm as good/excellent as a destination for holiday. The visitors in the fourth quarter of 2000 are most satisfied with Bornholm as a holiday destination (Table 3-42) while the visitors in the third quarter are less satisfied (although still very satisfied).

When it comes to the question concerning value for money the visitors in the first quarter proved to be the most satisfied while the visitors in the second quarter are the least satisfied. Throughout 2000 almost none of the visitors were dissatisfied (not good enough/poor) with Bornholm as a destination for holiday and only 6% of the visitors were unsatisfied (not good enough/poor) with the value for money. This was also the case in 1999.

### 3.9.2. Likes about Bornholm

The most popular remarks on what visitors like about Bornholm in 2000 were:

- The landscape and nature;
- Quiet, harmony and atmosphere;
- Good language skills of local people;
- Good walking and bicycle paths;
- Local hospitality and friendliness.

### 3.9.3. Dislikes about Bornholm

When asking visitors in 2000 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;
- Bad sign posting;
- Transport too long/old ferries;
- Too many places closed outside the peak season;

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 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 to the island to visit friends and relatives or to combine holiday with visiting friends and relatives. Overall, 46% of the visitors in 2000 reply that they certainly will return to Bornholm while 1% answer certainly not.

### 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 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>195</b>	<b>451</b>	<b>1,271</b>	<b>387</b>	<b>2,304</b>
Excellent	72	70	70	74	71
Good	22	27	25	20	25
Average	6	3	4	6	5
Not good enough	0	*	0	0	*
Poor	0	0	0	0	0
Average score <sup>1</sup>	4.66	4.66	4.66	4.67	4.66

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 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>168</b>	<b>395</b>	<b>1,145</b>	<b>336</b>	<b>2,044</b>
Excellent	42	28	29	36	31
Good	29	34	37	30	35
Average	24	31	28	30	29
Not good enough	5	5	5	3	5
Poor	0	1	1	*	1
Average score <sup>1</sup>	4.07	3.83	3.88	3.98	3.91

Notes: 1. The range was *excellent*=5 to *poor*=1.  
2. \* means less than 0.5%

**Table 3-44: Probability of returning**

*Percentages*

Probability	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>199</b>	<b>456</b>	<b>1,270</b>	<b>395</b>	<b>2,320</b>
Certain	62	49	37	63	46
Likely	18	27	32	19	27
Maybe	15	20	24	15	21
Unlikely	4	4	7	3	5
Certainly not	2	1	1	1	1

**Table 3-45: Timing of return by country**

*Percentages*

Timing <sup>1</sup>	1st Qtr 2000	2nd Qtr 2000	3rd Qtr 2000	4th Qtr 2000	All Year
<b>Base: All Visitors</b>	<b>148</b>	<b>253</b>	<b>491</b>	<b>172</b>	<b>1,064</b>
This year	84	72	42	70	59
Next year	75	66	60	85	67
Next 2 years	82	60	61	77	65
Next 5 years	76	63	67	76	68

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 2000. The residents answered some 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

Throughout 2000 more than 80% of the residents stated their destination as somewhere in Denmark and 12% mentioned somewhere in Sweden (Table 4-1). While looking at the quarters it appears that Denmark as a destination was most noticeable in the fourth quarter of 2000. In the last quarter of 2000 some 87% of the residents had some place in Denmark as their destination.

The share of residents going to somewhere in Denmark has increase from 65% in the period 1996-1999 to 81% in 2000. This has happened at the expense of the residents travelling to Sweden. In the period 1996 – 1999 some 23% of the residents were travelling to somewhere in Sweden; in 2000 the share was down to 12%. The explanation has two sides. If the results from 1999 and 2000 are compared with the results from 1996 - 1998 it is seen that the share of residents going to Sweden after the second quarter of 1999 has declined remarkably. This reflects the annulment of the duty-free sale on the ferry between Rønne and Ystad by 1 July 1999. Also the bridge between Sweden and Zealand plays an important role since the bridge makes it easier for Bornholm residents to go to the rest of Denmark via Sweden.

##### 4.1.2. Purpose of trip

Table 4-2 shows purpose of trip among residents leaving Bornholm by ferry in 2000. The main purposes for the residents were holiday and visiting friends and relatives. Residents going on holiday accounted for almost one third in the third quarter of 2000 while residents travelling to visit friends and relatives accounted for 30% in the first quarter.

##### 4.1.3. Party size

Party size analysis is shown in Table 4-3. In the first three months of 2000 almost half of the residents were travelling alone which was also the case in the same period in 1999. Throughout the year 2000 some 36% were travelling alone and 37% were travelling two persons together.

Overall, average party size in 2000 was 2.65 persons. The party size was lowest in the fourth quarter (2.49) and highest in the first quarter (2.93).

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

*Percentages*

Destination	1st Qtr 2000	2nd Qtr 2000	3 <sup>rd</sup> Qtr 2000	4th Qtr 2000	All Year
Base: Residents	263	187	227	420	1,097
Denmark	73	79	79	87	81
Sweden	14	14	16	9	12
Germany	4	*	1	2	2
Norway	2	1	*	1	1
Others	7	6	4	1	4

Note: 1. \* means less than 0.5%

**Table 4-2: Residents by purpose***Percentages*

<b>Purpose</b>	<b>1st Qtr 2000</b>	<b>2nd Qtr 2000</b>	<b>3rd Qtr 2000</b>	<b>4th Qtr 2000</b>	<b>All Year 2000</b>
<b>Base: Residents</b>	<b>258</b>	<b>183</b>	<b>190</b>	<b>370</b>	<b>1,001</b>
Business conference/meeting/exhibition	7	4	2	12	8
General business	9	6	9	10	9
Holiday	16	17	32	11	17
Holiday/VFR	10	18	13	7	11
VFR solely	30	12	11	14	17
Sporting event	2	1	2	*	2
Education	5	2	1	2	3
Hospital	2	2	3	2	2
Party	4	22	6	24	15
Day Visit	4	6	7	8	6
Other <sup>1</sup> (including above combinations)	11	10	14	10	10

Notes: 1. Military service, specific interests, etc.

2. \* means less than 0.5%

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

<b>Party Size</b>	<b>1st Qtr 2000</b>	<b>2nd Qtr 2000</b>	<b>3rd Qtr 2000</b>	<b>4th Qtr 2000</b>	<b>All Year 2000</b>
<b>Base: Residents</b>	<b>270</b>	<b>210</b>	<b>230</b>	<b>424</b>	<b>1,134</b>
1	46	32	25	36	36
2	31	40	40	37	37
3	9	11	14	13	12
4	4	9	15	9	9
5	3	3	4	2	3
6	2	2	*	1	1
More than 6	5	3	2	2	2
Average (persons)	2.93	2.72	2.57	2.49	2.65

Note: 1. \* means less than 0.5%.

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