

Working paper nr. 15

Survey of Visitors to Bornholm

January - December 2002

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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 visitors from the rest of Denmark and overseas visitors from Germany, Sweden and, to a lesser extent, Norway.

Apart from records of overnight stays and passenger traffic kept by Denmark's Statistic, BornholmsTrafikken 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;*
- *Tourist Analysis Bornholm 1976: survey carried out by the county of Bornholm (Bornholms Amtskommune, 1976);*
- *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 (now: Centre for Regional and Tourism Research) began conducting a survey among visitors to Bornholm. The survey was 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 arriving and departing by ferry and plane were interviewed. From July 1996 only people departing by ferry were 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 seven and a half year altogether, the data can also disclose trends in visitor patterns.

The passenger survey carried out by the Centre for Regional and Tourism Research is, to our knowledge, the largest of its kind carried out in Denmark.

Due to cost and a change in organisational structure at the CRT, it was decided to cease the data collection in the way it had been carried out from the start. It is, however, the CRT's intention to use the data collected to this point for an assessment of Bornholm tourism in the future as well. Nevertheless, this is the last report of this kind.

*Peter Billing
June 2003*

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1. Executive summary in Danish

- Undersøgelsen blandt afrejsende turister fra Bornholm blev påbegyndt i juli 1995.
- Hvert år interviewes mere end 3.000 rejsende fordelt på ca. 1.000 fastboende bornholmere og ca. 2.000 besøgende.

Besøgende:

- I 2002 modtog Bornholm totalt set 595.000 besøgende, der tegnede sig for 4,3 mio. overnatninger. Beregningerne omfatter ferierejsende, forretningsrejsende, besøgende til familie/venner mv. Antallet af såvel besøgende som overnatninger er det højeste i den observerede periode.
- Hovedmarkederne for Bornholm er særligt det øvrige Danmark men også Tyskland og Sverige.
- Over tre fjerdedele af de besøgende til Bornholm har været på øen før.
- Størstedelen af de besøgende er ferierejsende, og selskabet består typisk af par eller familier med små børn.
- Det gennemsnitlige ophold er på knap en uges varighed, med faldende tendens.
- Hovedårsagerne for at vælge Bornholm som feriedestination nævner natur, atmosfære og landskab.
- Anvendelsen af internettet i forbindelse med booking af transport og overnatning er steget i forhold til år 2001.
- Der er generelt stor tilfredshed med forskellige aspekter vedrørende overnatningsudbuddet på øen.
- Godt 90% af de rejsende anvender bil (egen, lånt eller lejet) som transportmiddel under opholdet.
- En gennemsnitsbesøgende bruger i alt omkring DKK 2.150 på sin tur til Bornholm inklusive transport til og fra øen. Dette svarer til cirka DKK 355 i døgnet.
- Overordnet set er de besøgende tilfredse med Bornholm som feriedestination. Også når det gælder valuta for pengene er tilfredsheden forholdsvis høj, dog lavere end den generelle tilfredshed.

Fastboende:

- Størstedelen af de fastboende på Bornholm rejser væk fra øen for at besøge andre steder i Danmark.
- De fastboende rejser typisk for at holde ferie, besøge familie og venner eller kombinere en ferie med et besøg hos familie/venner.
- Den gennemsnitlige selskabsstørrelse er på godt 2 personer; 42% rejser alene.

2. Survey design

2.1. The composition of the report

The report is divided into five chapters. This chapter provides the reader with some general background information about the survey design. In the following chapter the collected data are used to estimate the number of visitors and visitor nights in the years 1996 - 2002. The method and the results are presented numeric as well as graphic. The fourth section describes the visitors departing Bornholm by ferry in the period January - December 2002. The questions were asked partly to assess whether the sample is representative of known characteristics of visitors from other sources and partly to be able to analyse the results by key variables. Bornholm residents were filtered through a screening process, but were asked some supplementary questions. The findings of these are described in chapter five. Throughout the report comparisons with previous years will be made when appropriate.

2.2. Survey methodology

Enclosed, as Appendix 2 is the questionnaire concerning sea departures used during the period of January - December 2002 is shown. In the middle of 2001, the questionnaire went through an extensive tidying-up operation. Some answer categories did no longer seem relevant and thus were removed from the questionnaire to reduce the length of the questionnaire, partly because the decreased travel time on the fast ferry gave the respondents less time for filling in a questionnaire of up to 6 pages. However, this prevents the reader from comparing the results with corresponding results from previous years directly. The tidying-up process, on the other hand gave the respondents more time to answer the remaining questions and made room for adding trailer questions of relevance whenever suitable. This relates amongst other places in the report to Table 4-15, Table 4-32, Table 4-33, and Table 4-36.

The questionnaires were available in four different languages (Danish, Swedish, German and English). Interviewing arrangements were 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 was done so as to ensure that no systematic bias could arise in the quarterly reporting of information. Contacts are only 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 took place on ferry departures to Copenhagen, Ystad (Sweden) and Sassnitz (Germany). Cost dictate that respondents were introduced to the questionnaire and thereafter completed it themselves, with interviewers on hand to deal with any issues that might arise.

The limited number of source markets for Bornholm indicated that the working sample size needed 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 were 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 was anticipated that the chosen method of interviewing could lead to some wastage in the form of unusable returns, but this was accommodated within the target.

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.

2.3. The year 2002

This report covers a representative sample of the visitors and residents departing Bornholm by ferry in the period 1 January - 31 December 2002. During the summer of 2000 a new fixed link (tunnel and bridge, termed Øresundsbron) between Denmark and Sweden opened and a fast ferry connection between Ystad (Sweden) and Rønne (Bornholm) was taken into use in May. This meant that the travel time between

Rønne and Copenhagen is almost halved from 5-6 hours down to 2-3 hours. The effect of the change on the number of visitors is illustrated in Table 3-1, however, the increase in number of passengers is not reflected in the increase in contacts and thus a slightly smaller sample size in comparison to last year. The sample size is illustrated in Table 2-1.

The frequency tables in this report are based on the statistics shown in Table 2-1. Over the year 2 516 visitor questionnaires were collected, with a wastage rate of just below 5% together with 955 screen responses containing basic information about trip movements of the residents of Bornholm. Overall, 73% of the sample was visitors. Some 51% of the contacts were male and 49% female.

Table 2-1: Sample (departing by ferry)

	1st Qtr 2002		2nd Qtr 2002		3rd Qtr 2002		4th Qtr 2002		All Year	
	Base	%	Base	%	Base	%	Base	%	Base	%
Visitors	313	48	695	78	1,199	84	309	60	2,516	73
Residents	336	52	192	22	221	16	206	40	955	28

In chapter three and four the tables are laid out in a manner that show all cell entries as percentages, unless otherwise specified. The basis on which these percentages are calculated are the number of respondents answering that question. The number of respondents is shown in bold type at the top of each column. That number for a given category may change from table to table because of incomplete answers.

2.4. Acknowledgements

It would have been impossible to conduct this survey without the help and effort of many people. The ferry company, BornholmsTrafikken was 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 2002, two interviewers, Kiss Knak and Martin Jensen, were involved in collecting data. Hasse Jensen was responsible for the daily data processing, mainly the frequency control of the database. Charlotte Rassing was so kind as to assist with the detailed data control, and together with Hasse Jensen made most of the tables in the report. Finally, Ann Hartl took care of the overall planning of schedules, together with writing the commentary and editing of the final version of this report.

3. Number of visitors and visitors nights

As already mentioned in the preceding sections, the Centre for Regional and Tourism Research (CRT) has collected 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:¹

- N = the total number of contacted parties leaving Bornholm in the period (CRT)
- N_{sea} = the total number of contacted parties on the departing ferries (CRT)
- N_{air} = the total number of contacted parties on the departing aeroplanes (CRT)
- PV_{sea} = average party size among the visitors on the departing ferries (CRT)
- PV_{air} = average party size among the visitors on the departing aeroplanes (CRT)
- PR_{sea} = average party size among the residents on the departing ferries (CRT)
- PR_{air} = average party size among the residents on the departing aeroplanes (CRT)
- R_{sea} = the number of Bornholm residents among the contacts made on the departing ferries (CRT)
- R_{air} = the number of Bornholm residents among the contacts made on the departing aeroplanes (CRT)
- V_{sea} = the number of visitors among the contacts made on the departing ferries (CRT)
- V_{air} = the number of visitors among the contacts made on the departing aeroplanes (CRT)
- 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 (CRT)
- L_{air} = average length of stay among tourists departing by aeroplane (CRT)

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

The interviewers from the Centre for Regional and Tourism Research are not allowed to interview more than one person from the same party. Regarding this procedure every respondent represents a party and not necessarily 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 3-1 shows the results of the calculations.

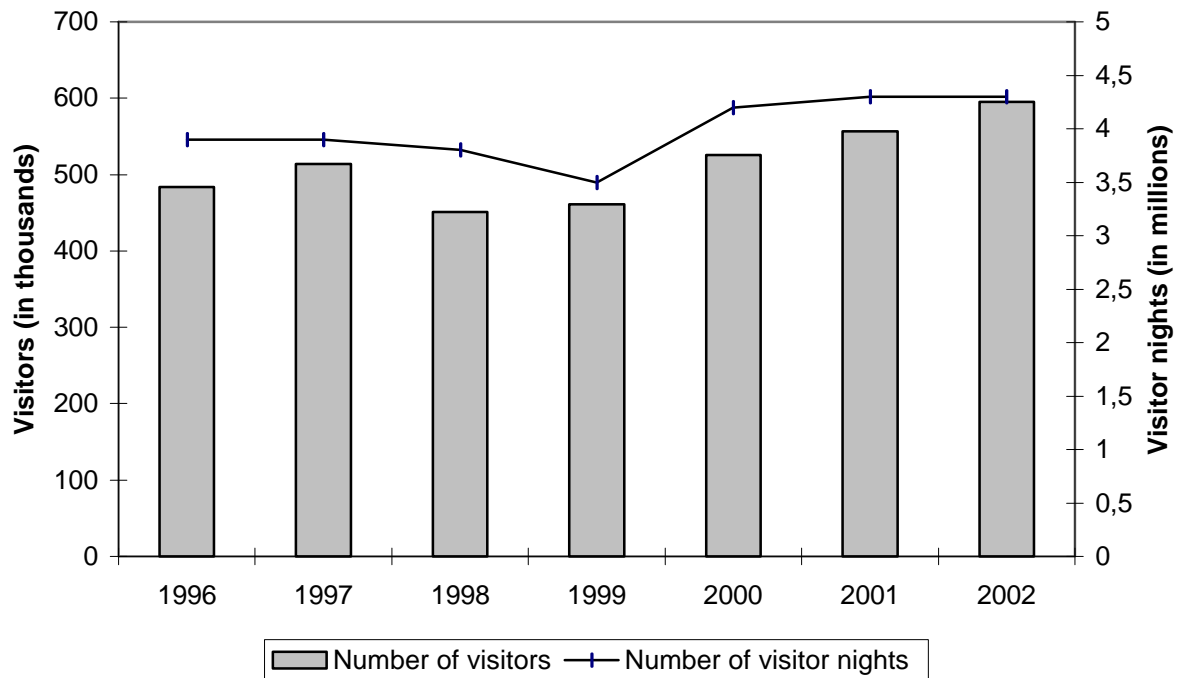
Table 3-1: Number of visitors and visitor nights (in thousands)

	1996	1997	1998	1999	2000	2001	2002
Number of visitors	484	514	451	461	526	557	595
Number of visitor nights	3,900	3,900	3,800	3,500	4,200	4,300	4,300

¹ Please note that figures on air passengers is based on the data collected by the centre during the first year of the survey.

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 and again in 2001 the number went up.

Figure 3-1: Number of visitors and visitor nights



A fast ferry connection between Rønne and Ystad started operating in the summer of 2000 and the fixed link (bridge and tunnel) between Denmark and Sweden opened for traffic on 1 July 2000. Thereby travel time between Copenhagen and Rønne was reduced from 5-6 hours to 2½-3 hours. The impact on the number of visitors was obvious for the year 2000 and 2001. Again in 2002 the visitor number increased, now to 595 000, which is the highest level in the period surveyed.

Overall Bornholm experienced an increase in the number of visitors, whilst visitor nights stagnated in 2002. Compare also table 4-8.

4. Profile and characteristics of visitors

In this section of the report the data collected among visitors leaving Bornholm by ferry in the period January - December 2002 are reported. Where appropriate, comparisons with previous years will be made.

4.1. 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

4.1.1. Key markets

Comparing the results from the third quarter of 2002 with the results from the summer of 1969, the summer of 1976 and the third quarter of 1995-2001 it becomes evident that the key markets for Bornholm have not changed. The key markets are still the rest of Denmark, Germany and to some extent Sweden. This is true for the second and third quarter of 2001 (Table 4-1). In the first and fourth quarter of the year the Swedes only counted for about 4% and 2% respectively of the total number of visitors. This is the lowest level observed since the data collection began in July 1995.

Overall, some 69% of the visitors in 2001 were from the rest of Denmark. This is remarkably above the levels of previous years. Back in 1996 Danes accounted for 49% of the total number of visitors. In 1997 the share went down to 42%. In 1998 and 1999 visitors from Denmark accounted for about half of the total number of visitors. Presumably as a result of the improved connection between the Greater Copenhagen area and Bornholm the share of Danes increased to 57% in 2000. In 2001 the share was 65%.

During the year 2002 the share of Danes varies between 63% in the third quarter to 84% in the first quarter as a result of the many people travelling to visit friends and relatives on Bornholm.

Sweden and Germany are linked to the island by proximity and, in the main, the sea transport network, because, unlike other island destinations, e.g. in the Mediterranean, there have been no major developments of air routes and charter flights. Throughout the year Germans account for one fifth of the visitors to the island and Swedes account for 11%.

4.1.2. Type of visit

About 79% of the visitors interviewed during the year 2002 had been to Bornholm before (Table 4-2). A tendency that already prevailed in the period 1996 to 2001. More than three quarters of the repeat visitors in 2001 were from Denmark. Visitors from Germany, account for 12% of the repeat visitors to Bornholm, while Swedes account for 6%. In total the key markets for Bornholm (Denmark, Germany and Sweden) account for 98% of the repeat visitors to the island. Clearly, Bornholm has a regular repeat following, with strong loyalty to the product. This fact is illustrated in Table 4-3 and Table 4-4.

Overall, about 54% of the visitors to Bornholm in 2002 had visited the island more than ten times before. In the first and fourth quarter between 56 and 63% of the respondents stated that they had visited the island more than 20 times before. Throughout year 2002 more than two thirds of the visitors had been to Bornholm more than 5 times before. The share increased to above 80% in the fourth quarter. This pattern was the same during the period from 1996 to 2000 and is closely related to the many tourists visiting friends and relatives for the Christmas holidays.

Some 24% of the repeat visitors in 2002 were back for at least the second time in the current year (Table 4-4). The time of year for the interview is reflected in the variations in the different quarters. In the fourth quarter some 60% state that they had been to Bornholm earlier this year compared to 24% in the first quarter, which of course is not surprising.

4.1.3. Purpose of visit

It is no surprise that the majority of the people visiting Bornholm during 2002 were on holiday (Table 4-5). There are some variations during the year. In the first quarter many visitors are on a business trip, visiting friends and relatives or combining holiday with a visit to friends and relatives. In the second and third quarter the majority of the visitors come to Bornholm for holiday purposes. In the fourth quarter holiday, holiday combined with a stay at friends and relatives' and solely visiting friends and relatives are the dominant purposes for the visit to the island.

Overall, 51% of visitors in year 2002 state the main purpose of their trip to Bornholm as holiday. This is the lowest number observed until now and just below the level of 1999-2001. In 1996, 1997 and 1998 the corresponding shares were respectively 59%, 67% and 61%.

4.1.4. Party composition and party size

Visitors were asked about whom they were travelling with (Table 4-6). Especially adult couples – but also families with children below 15 years - form the core of the market. This keeps average party size to just below three persons (Table 4-7). Average party size is below the level in 2000, 1999 and 1998 but still above the level in 1997 and 1996.

Some differences in the average party size throughout the year can be observed. Typically average party size is higher during the second and third quarter when families travel together on holiday. In this period average party size in 2002 is 3.2 while the average party size in the first and fourth quarter is below 2.3 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.

4.1.5. Length of stay

During the year 2002 visitors to Bornholm stayed on average for 6.8 days. The average length of stay varies between the different quarters from 4.8 in the fourth quarter to 7.6 in the third quarter, which covers the peak season (Table 4-8). The average length of stay during 2002 is below the level in the period observed from 1996 - 2001.

In the first and fourth quarter of 2002 approximately half of the visitors to the island stayed for less than four days. In the second half, almost one quarter of the visitors to Bornholm stayed for less than four days. This is at the same level as in 2000. 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 improved transport conditions have caused the increase in the short break market, a development that had been anticipated.

4.1.6. Socio-economic characteristics

Occupational characteristics of respondents in the period July 1995 - December 2001 are principally professional, managerial and administrative (Table 4-9). This is reflected in the relatively high educational level among the visitors (Table 4-11). 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 4-12).

Table 4-1: Visitors by country of residence

Percentages

Country	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	313	695	1,199	309	2,516
Denmark	84	66	63	83	69
Sweden	4	10	13	2	9
Germany	11	19	19	14	17
Norway	1	3	5	*	3
Others	*	2	2	1	1

Note: * means less than 0.5%

Table 4-2: Visitors by type of visit

Percentages

Visit	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	305	661	1,141	309	2,416
First	5	24	27	11	22
Repeat	95	76	73	89	79

Table 4-3: Visitors by number of visits

Percentages

Previous Visits	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: Repeat Visit	294	618	1,093	299	2,304
1	4	13	13	4	11
2	4	10	11	7	9
3	5	8	7	4	7
4	4	5	6	3	5
5	5	3	5	2	4
6-10	14	9	10	10	10
11-20	8	7	5	7	6
More than 20	56	45	43	63	48

Table 4-4: Visitors by last visit

Percentages

Last Visit	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: Repeat Visit	298	616	1,070	301	2,285
First visit	4	19	23	10	18
Earlier this year	24	18	18	60	24
Last year	52	20	17	10	22
Within last 2 years	5	10	6	5	7
Within last 5 years	6	10	9	5	8
More than 5 year	9	23	26	10	21

Table 4-5: Visitors by purpose

Percentages

Purpose	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	301	654	1,138	306	2,399
Business or other work	20	6	3	9	7
Holiday	18	54	63	32	51
Holiday/VFR	24	13	18	23	18
VFR solely	26	9	5	28	12
Sport event	2	4	4	*	4
Education	1	2	*	0	1
Cultural event	1	3	1	1	1
Other (including above combinations)	9	10	5	7	7

Note: 1. * means less than 0.5%

Table 4-6: Visitors by party composition

Percentages

Party Composition	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	303	658	1,125	307	2,393
Travelling alone	35	11	8	24	14
Husband/wife/partners only	26	41	38	31	37
Family group: children under 15	14	14	25	24	20
Family group: children grown up	4	5	6	4	5
Family group /relations	6	5	4	4	4
Friend/friends	4	8	8	3	7
Other	11	16	11	10	13

Table 4-7: Visitors by party size

Percentages

Party Size	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	313	695	1,196	308	2,513
1	47	21	11	29	21
2	30	50	43	37	42
3	10	12	17	14	14
4	8	12	18	13	15
5	4	4	6	6	5
More than 5	1	1	5	1	3
Average (persons)	2.0	2.5	3.2	2.3	2.7

Table 4-8: Visitors by length of stay

Percentages

Period	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	302	655	1,137	305	2,399
Day visit	15	4	3	7	5
Short stay ¹	34	23	16	44	24
Up to one week	41	52	48	38	47
One - two weeks	7	18	27	10	20
Two - three weeks	*	3	5	1	3
More than three weeks	2	1	2	1	1
Average (days)	5.1	7.0	7.6	4.8	6.8

Note: 1. Up to three days.

Table 4-9: Respondents' occupation

Percentages

Occupation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	259	511	927	262	1,959
Self-employed	4	6	4	8	5
Professional and managerial	23	17	21	18	20
Administrative	29	26	28	28	28
Clerical	5	6	7	7	7
Skilled wage earner	21	17	17	13	17
Unskilled wage earner	1	1	1	*	1
Assisting spouse	0	*	*	0	*
Employment, not further specified	1	*	0	0	*
Retired	10	21	17	17	16
Student	5	4	4	8	5
Economically inactive ¹	1	2	1	1	1

Notes: 1. Includes unemployed and home workers.

2. * means less than 0.5%.

Table 4-10: Spouses' occupation

Occupation	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	163	377	741	190	1,471
Self-employed	2	5	5	5	4
Professional and managerial	20	16	17	18	17
Administrative	36	23	25	28	26
Clerical	7	7	9	8	8
Skilled wage earner	18	18	23	15	20
Unskilled wage earner	1	1	1	0	1
Assisting spouse	1	1	1	2	1
Employment not specified	1	*	0	0	*
Retired	6	21	14	19	17
Student	4	3	2	3	2
Economically inactive ¹	4	5	3	3	4

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

Table 4-11: Respondents' education

Education	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	254	540	974	270	2,035
Up to 9 years	17	18	14	12	15
9 - 12 years	19	26	27	24	25
12 years + vocational	37	30	31	33	32
12 years + academic	28	26	28	32	28

Table 4-12: Respondents' age

Age	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	288	610	1,075	289	2,262
16 - 24 years	5	2	3	4	3
25 - 34 years	19	12	12	20	14
35 - 49 years	26	27	37	35	33
50 - 59 years	33	31	26	23	28
60 - 69 years	12	21	17	18	18
Over 69 years	5	8	5	2	5

Table 4-13: Visitors' gross family income per annum

Family Income	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	256	514	936	267	1,973
Less than 200,000 DKK	11	12	11	11	11
200,000 - 400,000 DKK	32	41	38	31	37
400,000 - 700,000 DKK	38	37	40	42	39
Greater than 700,000 DKK	18	10	11	17	13

4.2. 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

4.2.1. Visit to Bornholm as a child

The base for the enquiry as to whether visitors had been to Bornholm as a child, were those respondents who had been to the island before. More than two thirds of the visitors in the first and fourth quarter had been to the island when they were children (Table 4-14). This reflects the great number of Danish visitors in these quarters and the tendency is true for all of the surveyed period 1996-2000.

About 14% of the visitors to Bornholm in 2002 had visited the island before with their school. Overall, 50% of the visitors in 2002 had been to the island as a child. This is a slightly larger share as in previous years. The share of visitors in 2002, who had been to Bornholm as a child varies between 68% in the fourth quarter and 43% in the third quarter. This of course has to do with the composition of the visitors' nationality throughout the year.

4.2.2. 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 recommended by family/friends and family/friends on the island and the majority of the respondents are covered (Table 4-15). What then matters are the remaining means of communication, and here guide books/brochures seem to be the most important items. Please note that this question was affected by the changes made in the questionnaire during 2001.

4.2.3. Attractiveness of Bornholm as a destination

Using a Likert preference scale whereby a score of 4 stands for very important and 1 for unimportant, visitors were asked to rank the significance of different components that make up the attractiveness of the Bornholm tourist product (Table 4-16). The highest scores in the surveyed period July 1995 - December 2002 have been achieved by general features such as the nature, atmosphere and landscape, and the lowest in specific activities such as fishing and golf courses.

Throughout 2002 some 64% evaluate the nature on the island as very important for their decision to visit; only 3% mention golf courses as very important. The tendency is reflected in all quarters of 2002.

Table 4-14: Visited as a child

As child	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: Repeat Visits	288	637	1,097	299	2,321
No	33	55	57	32	50
Lived on Bornholm as a child	19	9	6	28	11
With family/friends	16	11	11	12	12
With/visit f amily/friends	5	2	2	1	2
With school	13	14	15	15	14
With club/association	*	1	1	0	1
With above combinations	14	8	8	12	10

Note: 1. * means less than 0.5%

Table 4-15: Finding out about Bornholm

Information Source	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	301	654	1,138	306	2,399
Always known	55	50	52	57	53
Family/friends on Bornholm	44	20	20	32	24
Recommended by family/friends	9	24	27	12	22
Guide book/brochure	4	18	15	7	14
Internet	2	7	7	2	6
Other	1	3	3	3	3

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

Table 4-16: Aspects of Bornholm

Scores / Rank

Evaluation	1st Qtr 2002		2nd Qtr 2002		3rd Qtr 2002		4th Qtr 2002		All Year 1,914	
	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank
Base: All Visitors	261		490		904		259			
Family/friends on Bornholm	3,24	2	2,29	11	2,22	12	3,01	3	2,48	8
Beaches	2,66	5	2,58	7	2,85	5	2,74	5	2,74	6
Landscape	3,24	2	3,52	2	3,47	3	3,29	1	3,43	2
Cycle routes	2,20	9	2,31	10	2,30	11	2,15	9	2,28	12
Walking	2,54	7	2,69	6	2,57	7	2,58	7	2,60	7
Fishing towns	2,90	4	3,08	4	3,09	4	2,97	4	3,05	4
Nature	3,31	1	3,61	1	3,56	1	3,29	1	3,51	1
Golf courses	1,21	13	1,28	14	1,23	14	1,33	13	1,29	14
Fishing	1,66	12	1,51	13	1,40	13	1,56	12	1,48	13
Cultural history	2,55	6	2,87	5	2,78	6	2,66	6	2,76	5
Restaurants	2,13	10	2,32	9	2,45	9	2,14	10	2,34	10
Craft/art workers	2,21	8	2,43	8	2,49	8	2,26	8	2,42	9
Atmosphere	3,15	3	3,45	3	3,50	2	3,17	2	3,41	3
Variety of activities	2,03	11	2,27	12	2,42	10	2,10	11	2,30	11

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

Table 4-17: Aspects of Bornholm assessed as very important

Percentages

Features	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	All
	2002	2002	2002	2002	Year
Base: Holidaymakers	261	490	904	259	1,914
Friends/family on Bornholm	66	35	30	58	40
Beaches	27	23	29	29	27
Landscape	51	61	55	54	56
Cycle routes	17	20	18	14	18
Walking	21	24	20	23	21
Fishing towns	33	35	35	35	35
Nature	58	70	63	58	64
Golf courses	3	4	3	4	3
Fishing	10	10	5	7	7
Cultural history	18	24	21	24	22
Restaurants	7	11	13	7	11
Craft/art workers	7	13	12	10	11
Atmosphere	44	57	59	47	55
Variety of activities	10	13	14	11	13

4.3. 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

4.3.1. Booking arrangements

Overall, the visitors in 2002 report that they were most likely to book transport directly with the carrier (Table 4-18), whereas proportionately the use of a travel agent when booking accommodation is more common. However, as a some fifth of all respondents stay with friends and relatives, they do not have to make accommodation bookings at all. An increasing number of visitors mark that they booked directly with the carrier by using the Internet. As this question was changed as a result of the major change of the questionnaire in 2001, respondents are no longer required to indicate yes or no for each response possibility in question 14, therefore results are no longer directly comparable with previous years. For this year's report it has been chosen to take percentages of the overall number of respondents, whilst it was still possible to render multiple returns, it is reckoned that the picture provided in Table 4-18 reflects the responses as correctly as possible.

There are some differences between the four quarters. Especially in the fourth quarter of 2002 many visitors stayed with friends and relatives meaning they did not have to book accommodation at all.

4.3.2. Tourist information centre usage

Of the seven tourist information centres in Bornholm, the Welcome Centre (Velkomstcentret) in Rønne is the most used (Table 4-19). This relates to location at the main point of entry, as the ferries to Bornholm arrive at Rønne harbour.

Not surprisingly the visitors in the third quarter are those, who use the tourist information network most extensively. 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 4-18: Booking arrangements

Information Centre	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	649	887	1420	515	3 471
Booked transport directly with the carrier	29	33	40	30	35
Booked transport through travel agent	6	19	20	12	16
Booked transport through the internet	7	11	12	12	11
Company took care of the transport booking	3	4	2	2	3
Family/friends booked transportation	2	2	3	3	2
Booked accommodation directly with the landlord	8	18	23	9	17
Booked accommodation through a travel agent	3	16	18	7	13
Booked accommodation through the internet	1	6	7	2	5
Staying with friends and relatives	25	17	19	32	21
Family/friends booked accommodation	17	3	3	1	5
Bought a package tour from a travel agent	1	9	9	4	7
Used a travel agent near home	2	5	5	4	4
Used a travel agent in Bornholm	1	2	3	1	2
Booked through holiday cottage booking agency on Bornholm	1	2	3	1	2
Booked holiday cottage through agency elsewhere	-	2	2	1	1
Travel with club/association	15	10	9	1	9

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

Table 4-19: Tourist information centre usage

Information Centre	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	240	504	918	249	1,911
Aakirkeby	1	4	4	2	3
Gudhjem	3	8	9	5	7
Hasle	3	5	5	1	4
Nexø-Dueodde	4	7	7	8	7
North Bornholm, Allinge	4	6	8	6	7
Rønne, Velkomstcenter	6	14	15	7	13
Svaneke	3	6	5	3	5

4.4. Accommodation usage and evaluation

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

Findings

4.4.1. Type of accommodation

In the first and fourth quarter of 2002 approximately half of the visitors preferred staying with friends and relatives as type of accommodation (Table 4-20). Conversely, in the second and third quarter holiday cottages are a preferred choice when visitors choose their place of stay. Looking at the year altogether, hotels together with holiday cottages and staying with friends and relatives account for more than three quarters of the visitors' choice of accommodation. This distribution of accommodation usage is keeping with the overall tendency throughout the period surveyed.

Generally speaking, hotels and holiday cottages proved to be very popular as types of accommodation throughout the period July 1995 – December 2001. This reflects the supply on the island, as the hotels and the holiday cottages account for more than two-thirds of the bed capacity on Bornholm (see Appendix I).

4.4.2. Evaluation of accommodation

Table 4-21 presents an evaluation by all visitors of their place of accommodation in 2002, covering 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. However, there is some concern on the price level. This is reflected in the overall value for money score, which links quality to price. This concern has been expressed throughout the whole period 1996-2002.

Also, throughout the period 1996-2002, particularly scores during the third quarter are below the annual averages for the year and this has a clear effect on the annual scores.

Table 4-22 to Table 4-30 examine the different aspects of the visitors' perceptions of their place of stay by quarters of 2002. Overall, the tourists in the first quarter are the most satisfied with all aspects of their accommodation.

Table 4-20: Accommodation usage

Accommodation	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Staying Visitors ¹	349	323	1,334	372	2,378
Hotel	13	25	26	15	23
B & B/Private Home	1	1	2	*	1
Farmhouse	*	*	1	1	1
Youth Hostel	0	3	3	1	2
Holiday Centre	2	5	4	3	4
Friends and Relatives	55	19	19	47	26
Holiday cottage	32	33	29	31	31
Camping	*	6	10	0	6
Caravan	*	2	3	0	2
Other	2	5	3	1	3

Note: 1. The base includes multiple accommodation use.

Table 4-21: Evaluation of accommodation

Average scores

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Average Score ¹					
Base: All Visitors	349	398	722	94	1,563
Accommodation	4.35	4.28	4.03	4.18	4.14
Location	4.55	4.47	4.30	4.45	4.38
Facilities	4.25	4.01	3.82	4.10	3.92
Décor	4.35	4.03	3.82	4.10	3.93
Cleaning Standard	4.46	4.04	3.83	4.00	3.94
Food and beverages	4.31	4.18	4.01	4.33	4.10
Service	4.38	4.26	4.06	4.22	4.15
Price level	3.80	3.86	3.53	3.71	3.66
Overall value for money	4.16	3.95	3.78	3.87	3.86

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

Table 4-22: Quality of accommodation

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	72	390	713	89	1,264
Excellent	50	47	34	39	39
Good	35	35	41	44	39
Average	15	17	21	14	19
Not good enough	0	*	4	2	2
Poor	0	*	1	1	1
Average score ¹	4.35	4.28	4.03	4.18	4.14

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

Table 4-23: Quality of location

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	71	398	722	94	1,285
Excellent	61	58	49	54	53
Good	34	31	36	36	34
Average	6	10	13	10	11
Not good enough	0	*	2	0	1
Poor	0	0	1	0	*
Average score ¹	4.55	4.47	4.30	4.45	4.38

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

2. * means less than 0.5%.

Table 4-24: Quality of facilities

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	64	370	671	89	1,194
Excellent	45	34	27	35	30
Good	36	37	36	45	37
Average	17	27	33	17	29
Not good enough	2	2	4	2	3
Poor	0	*	1	1	1
Average score ¹	4.25	4.01	3.82	4.10	3.92

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

2. * means less than 0.5%.

Table 4-25: Quality of décor

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	68	373	704	89	1,234
Excellent	50	35	25	34	30
Good	37	38	39	48	39
Average	12	23	30	14	26
Not good enough	2	4	5	3	4
Poor	0	1	2	1	1
Average score ¹	4.35	4.03	3.82	4.10	3.93

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

Table 4-26: Cleaning standard

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	63	355	644	74	1,136
Excellent	54	39	27	35	33
Good	38	34	40	39	38
Average	8	20	25	19	22
Not good enough	0	5	7	4	6
Poor	0	2	2	3	2
Average score ¹	4.46	4.04	3.83	4.00	3.94

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

Table 4-27: Quality of food and beverages

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	51	276	486	46	859
Excellent	45	44	35	50	39
Good	41	35	36	33	36
Average	14	17	24	17	21
Not good enough	0	3	4	0	3
Poor	0	1	1	0	1
Average score ¹	4.31	4.18	4.01	4.33	4.10

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

Table 4-28: Quality of service

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	68	351	653	80	1,152
Excellent	50	47	37	43	41
Good	38	35	39	44	38
Average	12	16	19	13	17
Not good enough	0	1	4	1	3
Poor	0	1	2	1	1
Average score ¹	4.38	4.26	4.06	4.22	4.15

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

Table 4-29: Price level

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	66	359	683	83	1,191
Excellent	32	32	19	19	23
Good	24	31	30	40	31
Average	39	32	39	35	36
Not good enough	2	5	10	5	8
Poor	3	1	2	2	2
Average score ¹	3.80	3.86	3.53	3.71	3.66

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

Table 4-30: Overall value for money

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	68	372	685	87	1,212
Excellent	40	33	25	24	28
Good	38	35	38	48	38
Average	21	28	30	22	28
Not good enough	2	3	6	2	4
Poor	0	2	2	3	2
Average score ¹	4.16	3.95	3.78	3.87	3.86

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

4.5. 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.

Once again, this section is affected by the fundamental modification of the questionnaire in the summer of 2001. It had shown that throughout the period, many of the answer categories were only used by a very small numbers of respondents, thus it was decided to remove these categories, as it was assessed that this could be done without compromising the overall quality of the returns.

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 2002.

Findings

4.5.1. Heritage attractions

As shown in Table 4-31, the significant heritage attraction for all visitors is Hammershus Castle, which was also the case 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 the majority of first time visitors in this quarter.

4.5.2. Natural attractions

Throughout the period July 1995 - December 2001 natural attractions are also of most significance to tourists in the third quarter. Many tourists visit especially Helligdomsklipperne, Jons Kapel, Ekkodalen and Paradisbakkerne.

The visitor market penetration rates of the natural attractions are lowest in the first quarter where Helligdomsklipperne, which overall is the most visited natural attraction, is only visited by 8%.

4.5.3. Museums

Museums are generally not well attended throughout the period surveyed, the only exceptions being Bornholm's Art Museum and the Oluf Høst Museum. In the second quarter of 2001 Bornholm's Art Museum was visited by a quarter and the Oluf Høst Museum by 15% of the tourists.

It is important to notice that the museums, except for the Bornholm's Art Museum and Bornholm's Museum, close down from the end of October until mid-May.

4.5.4. Craft and other attractions

Of the remaining attractions, glass blowing and visiting a fish smoke house are the most popular throughout the whole period surveyed. Both glass blowers and fish smoke houses are 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 64% of the total number of tourists in 2001 visited a smoke house and 57% visit a glass factory/shop.

In May 2000 a new attraction, Natur Bornholm, opened. In the third quarter of 2000 the attraction was visited by 41% of the tourists and in the fourth quarter it was visited by 26%. In 2001 the corresponding shares are 31% and 13%. Overall in 2001, Natur Bornholm was visited by 28%.

4.5.5. 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 2001:

- Dueodde beach;
- Slotslyngen;
- Almindingen;
- Dørdalen;
- Old mills;
- Butterfly park in Nexø;
- Various towns.

Table 4-31: Visits to heritage attractions

Percentages

Attraction	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	301	654	1,138	306	2,399
Hammershus Castle	28	63	65	35	57
Hammershus exhibition	3	20	24	8	18
Østerlars round church	8	43	44	23	37
Other churches	13	42	43	19	36

Table 4-32: Visits to natural attractions

Percentages

Attraction	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	301	654	1,138	306	2,399
Christiansø	4	19	19	5	16
Paradisbakkerne	8	29	32	14	26
Ekkodalen	6	37	32	16	28
Rytterknægten	11	31	30	12	26
Helligdomsklipperne	8	40	46	16	37
Jons Kapel	7	31	32	9	26

Table 4-33: Visits to museums

Percentages

Museum	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	301	654	1,138	306	2,399
Bornholms Art Museum	10	19	19	4	16
Oluf Høst Museum	n/a ¹	17	15	7	13
Farm Museum	n/a ¹	7	9	4	7
Other museums	3	17	19	6	14

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

Table 4-34: Visits to craft and other attractions

Attraction	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	301	654	1,138	306	2,399
Glass factory/shop	17	58	68	30	55
Ceramic factory/shop	4	38	44	15	36
Art galleries	4	39	44	12	34
Textile shop	n/a ¹	11	13	2	11
Joboland Brændesgårdshaven	n/a ¹	10	23	n/a ¹	14
Fish smoke house	10	69	78	30	63
Natur Bornholm	n/a ¹	34	30	14	27
Medieval Centre	n/a ¹	10	16	4	11
A lighthouse	12	37	40	16	33

Note: 1. n/a means not available, because the attraction was closed during the time in question or not included in the questionnaire.

4.6. 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.

Again, this question was affected by the changes in the questionnaire in the same manner as regarding attractions.

Findings

4.6.1. Water based activities

As also was the case in the previous years the most popular water based activity in 2002 is going to the beach (Table 4-35). During 2002 almost 60% of the visitors went to the beach. Especially in the third quarter going to the beach and swimming in the sea are important water based activities. Some 75% of the visitors in the third quarter went to the beach and 63% went swimming in the sea.

Obviously there are differences between the quarters. The share that went to the beach in 2002 varies from 22% in the fourth quarter to 75% in the third. The share that went swimming in the sea varies from 2% in the first and fourth quarter to 63% in the third quarter. This reflects the island's importance as a beach holiday destination. The share that went swimming in the sea was 69% in the third quarter of 2001 compared with 52% in the third quarter of 2000. This has to be seen as a result of the relatively warm summers of 2001 and 2002 compared with 2000.

4.6.2. 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. Throughout the period from July 1995 – June 2001 participation in these specific activities has been small, which is the main reason why the answer categories scenic air flight and trotting races were removed from the questionnaire in the summer of 2001.

4.6.3. 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 4-36). Overall two thirds of the visitors to Bornholm in 2002 ate out during their stay. The share varies between 20% in the first quarter and 80% 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 2002 almost 90% of the visitors went shopping. This is at the same level as in previous years.

4.6.4. General recreational activities

Commensurate with the image of Bornholm as a holiday island where life proceeds at a leisurely pace, Table 4-36 indicates that just relaxing and driving around are common general recreational activities. In 2001 some 81% drove around the island and 88% were just relaxing. Walks on my/our own are also significant, particularly for visitors in the second and third quarter.

4.6.5. Other activities

Other activities recorded by visitors in 2001, but only for small numbers, were driving around on motor- or bicycle.

Table 4-35: Participation in water based activities

Percentages

Activity	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	301	654	1,138	306	2,399
Going to the beach	36	57	75	22	59
Swimming in the sea	3	22	63	2	39
Swimming in the pool	3	13	27	5	18
Boat trips	6	17	24	5	17
Fishing	8	9	8	3	7

Table 4-36: Participation in general recreational activities

Percentages

Activity	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	301	654	1,138	306	2,399
Golf	2	7	5	2	5
Bicycle ride	3	26	34	7	25
Guided coach tour	1	14	12	3	10
Guided walks	3	11	11	5	9
Walks on my/our own	33	57	57	40	52
Just relaxing	70	87	94	81	88
Driving around	68	80	87	71	81
Eating out	20	68	80	41	66
Shopping	56	82	88	66	80

4.7. Transport

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

Findings

4.7.1. Transport mode

By far the most popular mode of transport used for travelling about the island is the car (Table 4-37). This has been true throughout the period July 1995 – December 2002.

Overall, some 92% of the visitors in 2002 used their own car, a hired car or a private car provided by firm or friends as transport mode. The share varies from 87% in the third quarter to 98% in the first and fourth quarter. The share of people using a car to move around the island has increased in 2001 and can be seen as a result of the fixed link (Øresundsbron) between Denmark and Sweden combined with increased capacity on the Ystad-route. However, there has also been a notable increase in travellers using the bus link (Bornholmerbussen) and the newly established train connection from Copenhagen Central station to Ystad harbour, bringing visitors to the island who do not bring their own car.

Table 4-37: Transport mode

Transport	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors ¹	238	572	1,043	268	2,121
Public Bus	12	12	13	10	12
Bus Tour	3	12	8	3	8
Taxi	9	3	2	3	3
Car	98	93	87	98	92
Motorbike	0	1	1	0	1
Bicycle	13	22	30	15	24
On foot	41	41	51	44	46

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

4.8. Visitor expenditure

One of the most difficult aspects of the survey were 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

4.8.1. 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 4-8) and therefore tend to spend the most (Table 4-38). In the first quarter visitors to Bornholm spend DKK 1 314 on average compared with 2 915 in the third quarter. This also reflects the type of accommodation in the different quarters. Many visitors in the first quarter stay with family and friends while holiday cottages are much used as type of accommodation in the third quarter (Table 4-20).

4.8.2. Expenditure per person per day

When comparisons are made on the basis of expenditure per person per day, those on an inclusive tour tend to record the highest daily spending (Table 4-39). Visitors on an inclusive tour spend on average DKK 523 per person per day while visitors on an independent tour spend on average DKK 348 per person per day. Overall the visitors to Bornholm spend DKK 355 per person per day.

Table 4-38: Expenditure per person per trip

DKK

Country	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	186	381	766	201	1,534
Independent	1,302	1960	2887	1471	2,121
Inclusive	1,823	2173	3651	2148	2,645
All	1,314	1978	2915	1493	2,143

Table 4-39: Expenditure per person per day

DKK

Country	1st Qtr 2002	2 nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	186	381	766	201	1,534
Independent	318	359	362	304	348
Inclusive	325	474	607	481	523
All	318	368	369	309	355

4.9. 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

4.9.1. 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 2002. Throughout year 2002 some 96% of all visitors regard the island as good/excellent as a destination for holiday. The visitors in the second and third quarter are the most satisfied (Table 4-40) while the visitors in the first quarter are less satisfied (although still very satisfied).

When it comes to the question concerning value for money the visitors in the last quarter proved to be the most satisfied while the visitors in the first and third quarter are the least satisfied. Throughout the year 2001 almost none of the visitors expressed explicit dissatisfaction (not good enough/poor) with Bornholm as a holiday destination and only 6% of the visitors were dissatisfied (not good enough/poor) with the value for money.

4.9.2. Likes about Bornholm

The most popular remarks on what visitors like about Bornholm in 2002 were:

- Varied nature;
- General fondness of the island and stability/no change;
- Local hospitality and friendliness;
- Peaceful atmosphere;
- Beaches;
- Small fishing villages;
- Good walking and bicycle paths.

4.9.3. Dislikes about Bornholm

When asking visitors during 2001 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:

- Too expensive/lack of value for money;
- Too few activities/events outside the peak season;
- Too few departures to Bornholm;
- Improved public transport on the island (more departures and less expensive);
- Lack of rubbish disposal on public beaches, along cycle paths etc.;
- Concern about tourism destroying the most important assets of the island;
- Road quality and traffic;
- Bad sign posting.

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 and thereby the overall evaluation of the experience.

4.9.4. Probability of returning

Table 4-42 examines the probability that visitors will return to Bornholm. Throughout the years visitors outside the peak season show the highest likelihood of returning. This is also the case in 2001 and 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, 47% of the visitors in 2002 reply that they certainly will return to Bornholm while 1% answer certainly not. This is at the same level as in previous years.

4.9.5. 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 4-43. 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 4-40: Bornholm as a holiday destination

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2003	4th Qtr 2002	All Year
Base: All Visitors	271	606	1,064	281	2,222
Excellent	72	78	76	71	75
Good	21	19	21	26	21
Average	6	3	3	3	3
Not good enough	*	*	0	0	*
Poor	*	*	0	0	*
Average score ¹	4.64	4.75	4.73	4.68	4.72

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

Table 4-41: Value for money

Percentages

Evaluation	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	225	535	953	250	1,963
Excellent	39	34	34	34	35
Good	25	35	32	37	33
Average	29	24	27	26	26
Not good enough	5	5	5	2	5
Poor	2	1	1	1	1
Average score ¹	3.94	3.96	3.94	4.02	3.96

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

Table 4-42: Probability of returning

Percentages

Probability	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: All Visitors	279	611	1,066	285	2,241
Certain	64	44	39	64	47
Likely	22	25	30	22	27
Maybe	11	24	25	12	21
Unlikely	3	6	6	2	5
Certainly not	*	*	1	1	1

Note: 1. * means less than 0.5%

Table 4-43: Timing of return

Percentages

Timing ¹	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year 1069
Base: All Visitors	228	282	418	141	
This year	89	64	42	65	61
Next year	78	65	56	87	66
Next 2 years	77	65	59	82	65
Next 5 years	81	60	64	81	66

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

5. Bornholm residents

This part of the report covers the Bornholm residents leaving Bornholm by ferry in the period January - December 2001. The residents answered some questions in the screening procedure concerning their border destination, purpose of trip and party size.

5.1. Characteristics of Bornholm residents

Findings

5.1.1. Border destination

Throughout 2002 some 81% of the residents stated their destination as somewhere in Denmark and 10% mentioned somewhere in Sweden (Table 5-1). While looking at the quarters it appears that Denmark as a destination was most noticeable in all four quarters.

The share of residents going to somewhere in Denmark increased from 65% in the period 1996-1999 to 81% in 2000 and 85% in 2001. This happened at the expense of Bornholm residents travelling to Sweden. In the period 1996 – 1999 some 23% of the residents were travelling to somewhere in Sweden; in 2000 the share dropped to 12% and in 2001 the share was 10%. The explanation has two sides. Comparing the results from 1999 and 2000 with the results from 1996 - 1998 it becomes evident that the share of residents going to Sweden after the second quarter of 1999 has declined remarkably. This reflects the termination of the duty-free sale on the Ystad-route by 1 July 1999. Also the fixed link between Sweden and Denmark plays an important role since the improved infrastructure makes it easier for Bornholm residents to travel to the rest of Denmark via Sweden (instead of using the night boat to Copenhagen). The effect of the fixed link is reflected in the results for 2001 and onwards.

5.1.2. Purpose of trip

Table 5-2 shows purpose of trip among residents leaving Bornholm by ferry in 2002. The main purpose for the residents was related to family visits, either solely visiting friends and relatives or various combinations. However, residents going on a business trip account for some 18% of the total number of residents leaving Bornholm in 2002.

5.1.3. Party size

Party size presentation by quarter is shown in Table 5-3. In the first quarter of 2002 44% of the residents were travelling alone which is slightly below the share in the same period in the preceding years. Throughout the year 2002 some 38% were travelling alone and at the same time equally 38% were travelling two persons together.

Overall, average party size among residents in 2002 was 2.2 persons. The party size was lowest in the second quarter (2.0) and highest in the third quarter (2.6).

Table 5-1: Residents by border destination

Destination	Percentages				
	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: Residents	355	187	230	217	989
Denmark	81	79	80	82	81
Sweden	9	10	11	11	10
Germany	2	2	2	3	2
Norway	4	1	*	*	2
Others	4	9	7	4	6

Means less than 0,5%

Table 5-2: Residents by purpose

Percentages

Purpose	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: Residents	320	164	191	183	858
Business conference/meeting/exhibition	8	7	1	7	6
General business	14	11	10	9	12
Holiday	19	25	31	13	21
Holiday/VFR	1	1	2	*	1
VFR solely	30	18	23	32	27
Sporting event	1	2	6	3	3
Education	2	2	*	2	1
Removal	1	4	2	1	1
Family/friends get -together	17	18	17	25	19
Other ¹ (including above combinations)	6	12	8	9	8

Notes: 1. Military service, specific interests, etc.
2. * means less than 0.5%

Table 5-3: Residents by party size

Percentages

Party Size	1st Qtr 2002	2nd Qtr 2002	3rd Qtr 2002	4th Qtr 2002	All Year
Base: Residents	336	192	221	206	955
1	44	39	30	35	38
2	34	41	43	38	38
3	9	7	6	13	9
4	8	9	10	8	9
5	2	3	5	3	3
6	1	*	1	2	1
More than 6	1	1	4	1	2
Average (persons)	2.1	2.0	2.6	2.2	2.2

Note: 1. * means less than 0.5%.

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Appendix 1. Accommodation in Bornholm

Type of accommodation	Number	Total number of beds	Percentages
Hotels <40	26	624	2
Hotels 40-99	33	2 112	6
Hotels >99	15	2 760	7
Holiday centres	8	3 024	8
Youth hostels	8	984	3
Camp sites	19	8 056	22
Holiday cottages ¹	3 742	18 710	52

Note: 1. Only holiday cottages rented out through agencies are included.

Source: Denmark's Statistics and own survey.

SEA DEPARTURES



Thank you for participating in our survey. Where indicated, please complete by crossing the boxes so . If you wish to change your answer then alter the previous response in this manner . Any information given in this questionnaire will be treated strictly private and confidential.

Q1 Please give the name of your home town (where you have your current permanent address):

Q2 Which County/Municipality is that in?
County/Municipality _____
Own Postcode _____

Q3 On what date did you arrive in Bornholm?

Q4 In total, how many days have you spent in Bornholm? _____

Q5 Which of the statements below best corresponds to the composition of your personal party?

- (1) Travelling alone
- (2) Husband/wife only
- (3) Family group with children under 15 years
- (4) Family group with grown up children
- (5) Family group/relations with...
- (6) Friend/friends

Other _____
(please specify)

Q6 What is the main purpose of your visit?

- (1) Business conference/meeting/exhibition
- (2) General business - buying, selling, installation or other
- (3) Holiday
- (4) Holiday/visiting friends or relatives
- (5) Visiting friends or relatives solely
- (6) Sporting event
- (7) Education/school event
- (8) Cultural event

Other _____
(please specify)

Q7 Is this your first visit to Bornholm?

- (1) Yes
- (99) No

Q8 Have you ever lived (i.e. had a permanent address) in Bornholm?

- (1) Yes
- (99) No

Q9 How often have you visited (holiday, business trips, visits to friends and relatives etc.)? Bornholm before? Please give the number of times: _____

Q10 Did you ever come to Bornholm as a child?

- (1) Yes, with my family/relatives/friends
- (2) Yes, visiting family/relatives/friends
- (3) Yes, with my school
- (4) Yes, with my sporting club

Yes, _____ in _____ another _____ way

(99) No (please specify)

Q11 When was the last time you visited Bornholm?

- (1) Earlier this year
- (2) Last year
- (3) Within the last 2 years
- (4) Within the last 5 years
- (5) More than 5 years ago
- (99) First visit

Q12 How did you find out about Bornholm as a holiday destination?

You may choose as many possibilities as you wish.

- (1) Always known/been before
- (2) Family/friends/relatives on Bornholm
- (3) Recommendation of family/friends
- (4) Saw a guide book/brochure
- (5) Read about Bornholm on the Internet

Other _____
(please specify)

Q13 How important were the following aspects of Bornholm in making your decision to visit the island? Please look at all aspects.

	Very important	Im- portant	Less important	Un- important
Beaches				
Landscapes				
Cycle routes				
Walking routes				
Fishing villages and towns				
Nature				
Golf courses				
Fishing				
Cultural history				
Restaurants				
Craft/art workers				
Atmosphere				
A variety of activities				
Family/friends/relatives in Bornholm				

Q14 Booking arrangements - please look at the following statements and indicate as appropriate:

Transport	
I booked transport directly with the carrier	
I booked transport through a travel agent	
I booked transport through the Internet	
My company took care of my bookings	
Family/friends in Bornholm took care of the booking of transportation	
Accommodation	
I booked accommodation directly with the landlord/proprietor	
I booked accommodation through a travel agent	
I booked accommodation through the Internet	
I am staying with friends/relatives, so I did not have to book	
Family/friends in Bornholm took care of the booking of accommodation	
Other	
I bought a package/inclusive tour, e.g. one price for transport and accommodation, from a travel agent	
I used a travel agent near my home	
I used a travel agent in Bornholm/Bornholm tourist office to make my bookings	
I booked through a summer house booking agency in Bornholm	
I booked through a summer house agency elsewhere	
I travel with a club or an association	
Apart from the above regarding bookings, I did the following:	

Q15 Have you visited any of the Tourist Information Centres listed below? Please indicate for all whether you visited or not.

	Visited	
	Yes	No
Bornholms Velkomstcenter		
Gudhjem Turistbureau		
Hasle Turistbureau		
Nexø-Dueodde Turistbureau		
Nordbornholms Turistbureau		
Svaneke Turistbureau		
Sydbornholms Turistbureau		

Q16 Type of accommodation used during your stay: Please state all places of accommodation and the number of days spent in each.

Accommodation	Days	Nearest towns or villages
Hotel/Guesthouse/Pension, please give name		
Youth hostel		
Rented summer house through agency		
Rented summer house through other than agency		
Borrowed summer house from friends etc.		
Own summer house		
Stayed with family/friends		
Farmhouse		
B&B/private home		
Camp site:		
* Tent/camplet		
* Cabin		
* Own caravan		
* Rented caravan		
Holiday Centre		
Other (please specify)		
None / on a day visit		

Q17 In terms of the features listed below, what did you think of the quality of your place of stay? Please look at all aspects.

	Excellent	Good	Average	Not good enough	Poor
Service					
Accommodation					
Food and beverages					
Cleaning standard					
Price level					
Facilities					
Location/situation					
Decor					
Overall value for money					

Q18 Do you have any other comments on your accommodation? Please state

Q19 Which of the attractions mentioned below did you visit? Please look at all aspects .

Attractions	Visited this trip	Visited before	Not visited	Un-known
Hammershus Castle				
Hammershus Exhibition				
Østerlars Round Church				
Other churches				
Joboland Brændesgårdshaven				
Natur Bornholm				
Medieval centre				
Christiansø				
Fish smoke house				
Glass factory/shop				
Ceramic factory/shop				
Art galleries				
Textile workshop				
Bornholm Art Museum				
Oluf Høst Museum				
Farm Museum				
Other museums				
Paradisbakkerne				
Ekkodalen				
Rytterknægten				
Helligdomsklipperne				
Jons Kapel				
A lighthouse				
Other (please specify)				

Q20 Which of the activities mentioned below did you participate in? Please look at all activities.

Activities	Participated this trip	Participated before	Not participated at all
Going to the beach			
Swimming			
a) in the sea			
b) in a pool			
Cycling			
Guided coach tour			
Guided walks			
Walks on my/our own			
Boat trips			
Fishing			
Golf			
Eating out			
Shopping			
Just relaxing			
Driving around			
Day visit to _____			
Other (please specify)			

Q21 What were the main methods you used for travelling around Bornholm? Please choose the three most important. Max. three options

- (1) Public bus
- (2) Taxi
- (3) Own car
- (4) Hire car
- (5) Private car provided by firm or friends/relatives
- (6) Own bicycle
- (7) Rented bicycle
- (8) Coach tour
- (9) On foot
- Other _____

(please specify)

We would now like to ask you about your expenditure on this trip.

Q22 Including travelling to and from Bornholm, how much did you and your personal party spend on Bornholm? Please don't forget any expenditure by credit card or personal cheque.
Total amount DKK _____

If you have been on a day visit please give the price of that tour (excl. transport expenditure)
DKK _____

If you are on a package tour/inclusive tour please give price of that tour DKK _____

Just checking: How many people do this cover?
Number of persons _____

Q23 May we have your estimate of the breakdown of this expenditure (excl. any expenditure on day visit)?
Please state all amounts in Danish kroner (DKK).

		DKK	incl. in package
1	Ferry payments to and from Bornholm		
2	Accommodation on Bornholm – to cover room, any meals, tips and taxes included in the bill. Don't forget any deposit prior to arrival		
3	Eating and drinking		
4	Entertainment		
5	General shopping		
6	Souvenirs		
7	Transport on Bornholm		
8	Purchase of fuel, repairs and other items at garages		
9	Expenditure at attractions (include entrance fees, cafe-meals and shop purchases)		
10	Other travel expenditure such as insurance		
	Total amount		

Q24 Does this relate solely to your trip to Bornholm?

- (1) Yes
(99) No

Q25 Are you able to make an estimate of the amount of your package tour attributable to your trip to Bornholm (including travel to and from the island)?

- (1) Yes Total amount DKK _____
(99) No

Q26 Overall, what is your opinion of Bornholm as a destination to visit?

Excellent Good Average Not good enough

For holidays and recreation
Value for money

Q27 How likely would you be to return to Bornholm for a holiday in the near future?
 Certain Likely Maybe Unlikely Certainly not

Q28 If you were likely to return, how soon would this be?

Certainly
not

Certain Likely Maybe Unlikely

This year
 Next year
 Within next 2 years
 Within next 5 years

Q29 Will the new bridge between Denmark and Sweden and/or the new fast ferry between Ystad and Rønne mean that you travel more often to Bornholm?

Yes, certainly Yes, probably Un-certain Probably not Definitely not

More short stays in general
 More weekend trips
 More trips this time of the year
 More trips other times of the year

No, not more often, because :

Q30 Has the new bridge between Denmark and Sweden and/or the fast ferry between Ystad and Rønne influenced your decision about this trip to Bornholm?

Yes, a major influence
 Yes, to some extent

No, the new transport opportunities have had a negligible influence on my/our decision, because

Now we would like to ask you something about yourself

Q31 What is(was) your occupation (and that of your spouse/partner)?

Own occupation: Job title _____
 Occupation of spouse: Job title _____

Q32 Are you retired?

(1) Yes
 (99) No

Q33 Which age group do you belong to?

(1) 16-24 years
 (2) 25-34 years
 (3) 35-49 years
 (4) 50-59 years
 (5) 60-69 years
 (6) over 69 years

Q34 Which of the following best describes your full-time education?

(1) Up to 9 years
 (2) 9-12 years
 (3) 12 years + vocational education
 (4) 12 years + academic education

Q35 Which of the following best describes your total family/household income? ²

(1) Less than 200,000 DKK per year
 (2) 200,000-400,000 DKK per year
 (3) 400,000-700,000 DKK per year
 (4) More than 700,000 DKK per year

Q36 Is there anything you want to say about Bornholm that has not been covered?

What, if anything, did you particularly like about the island?

Was there anything outstanding or extra that you did not expect?

Q37 Equally important: what, if anything, did you particularly dislike about Bornholm? Was there anything unsatisfactory? Was there something missing from what you expected to find?

Q38 If you would be prepared to participate in other investigations undertaken by the Center for Regional and Tourism Research, please PRINT your NAME, ADDRESS, POST CODE and TELEPHONE NUMBER here?

THANK YOU VERY MUCH FOR YOUR
 CO-OPERATION - YOUR HELP IS HIGHLY
 APPRECIATED.

² DKK 100 = US\$ 20 = UK£ 10 = HLG 30 = FF 90.