SURVEY OF VISITORS TO BORNHOLM

JULY - SEPTEMBER 1995

Survey Design

Introduction

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

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

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

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

Survey Objectives

The overall objective was to provide a comprehensive description of visitors to Bornholm that was in keeping with the standard analysis of destination surveys. In this respect, the questionnaire was 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;
- *Organisation*: channels for arranging the visit;
- *Behaviour*: what visitors do on the island;
- *Attitudes*: what visitors think about their experiences on Bornholm;
- *Expenditure*: how much do visitors spend on the island?

Survey Methodology

It was agreed that the survey should run for a complete year, from 1 July 1995 to 30 June 1996, in order to reflect the seasonality of tourism on Bornholm. Interviewing arrangements were structured so as to guarantee that, at a minimum, every day of the week and each week in any one month for every quarter of the year was surveyed. This was done so as to ensure that no systematic bias could arise in the quarterly reporting of information. Contacts would only be adults, using as the definition 16 years of age and upwards.

Interviewing was carried out at the main points of exit and departure so that data collection took place mostly on Bornholmstrafikken's ferry departures to Copenhagen, Ystad (Sweden) and Neu Mukran and DFO's to Sassnitz (Germany), and on Maersk Air's route between Bornholm and Copenhagen as well as the air-departures during the main season to Germany. The length of the questionnaire and terminal arrangements made it necessary for the interviewers to conduct the survey on the ferries and the aircraft. Cost dictated that respondents would be introduced to the questionnaire and thereafter complete it themselves, with interviewers on hand to deal with any issues that might arise. Apart from scheduled sea and air carriers, samples were taken of visitors arriving by yachts and cruise ships, but these are not reported on here. They appear in the annual compilation.

The limited number of source markets for Bornholm indicated that the working sample size need not be large. But the paucity of information about visitors to the island commended a strategy of over-sampling so as to ensure results that were robust. A pilot questionnaire was run in early June with a sample of 50 respondents and a target of 6,000 visitor contacts (arrivals and departures) was set within the allotted time span, with a screen questionnaire to filter out local residents. It was anticipated that the chosen method of interviewing would lead to some wastage in the form of unusable returns, but this could be accommodated within the target. Altogether six different questionnaires were made up in four different languages (Danish, Swedish, German and English). Over the year, 6,071 visitor questionnaires were collected, with a wastage rate of just over 3%, together with 2,625 screen responses containing basic information about the trip movements of the residents of Bornholm.

Table A **Departure Sample** **3rd Qtr 1995**

Respondent Category	Base	Percentage
Day visitors	60	3
Stay visitors	1423	81
Bornholm residents	267	15

Note: 1. Percentage totals may not add to 100 due to rounding.

Third Quarter 1995

This report covers the third quarter of 1995, which is the major part of the tourist season on Bornholm. The frequency tables in the report are based on the statistics shown in Table A. In total, 82% of the sample were departing by sea, leaving the remainder departing by air: 47% of contacts were male and 53% female, though day visitors were more likely to be males travelling on business.

In the sections of the report that follow, the tabulations are made available in the order suggested by the objectives embedded in the layout of the questionnaire, save that behavioural and attititudinal questions are linked together by topic; accommodation, visits to attractions, activities pursued by visitors and mode of transport used.   These are then followed by expenditure data and the final section deals with overall impressions of Bornholm as a visitor destination, together with the likelihood of returning to the island.   It will be appreciated that in a comprehensive survey of this kind, there are a myriad of ways in which to present the data and it is only possible to show the highlights of the findings in this report.

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

Acknowledgements

It would have been impossible to conduct this survey without the help and effort of many people. The ferry companies, BornholmsTrafikken and DFO have been most helpful by supplying free transport for the interviewers as well as by allowing access to the terminal areas in order to interview passengers before departure.   Interviewing at the airport and on board the aircraft would not have been possible without the permission and help of the airport authorities at Bornholm and Copenhagen and Maersk Air.   Interviews with cruise passengers proved extremely difficult and was only possible due to the kind help of several tourist guides, namely Søssan Nielsen and Britta Grøn.

The planning and design of the questionnaire was carried out by Henrik Christoffersen, Ann. Hartl-Nielsen, Nils Finn Munch-Petersen and Stephen Wanhill, with the kind help and support of several colleagues at the Research Centre.   During the first year, five interviewers, Nikolaj Gregersen, Charlotte Ipsen, Knud Erik Jensen, Lone Thomsen and Mette Stender, were involved in collecting data and the data processing.   Ann. Hartl-Nielsen took care also of the overall planning of schedules, contact with transport companies and other administrative duties in regard to the survey. Finally, Charlotte Rassing Riis joined the team recently in order to assist with the data processing, mainly the control of the database and analyses work.

References

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Hasløv and Kjærsgaard I/S, (1995), Sommerhusprojekt Bornholm. Notat vedr spørgeskemaunder-søgelsen 1994, Hasløv and Kjærsgaard, Arkitektfirma I/S, Copenhagen.

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, mode of transport, purpose of visit, length of stay, party composition and socio-economic characteristics such as occupation, age, education and household income. 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.

Findings

1.1 The key markets for Bornholm are Denmark, Germany and Sweden (Table 1), which are linked to the island by proximity and, in the main, the sea transport network, because, unlike other island destinations, as for example in the Mediterranean, there have been no major developments of air routes. These markets are the same as in the 1969 survey, indeed, as they were at the turn of this century, although the mix has changed somewhat. However, it is not possible to make a direct comparison with the 1969 survey because of the low response rate on the routes to Germany.

1.2 Transport links and purpose of visit, namely business, imply that day visitors are more likely to be from Denmark or Sweden (Tables 1 and 5). German visitors are more likely to be on holiday (Table 6) and therefore staying overnight (Table 1).

1.3 Some 65% of visitors interviewed had been to Bornholm before (Table 2), a statistic that rose to 83% in the case of Danish visitors (Table 1). Note that the section covering the division between first and repat visit should be read horizontally in Table 1and not vertically. Clearly, Bornholm has a regular repeat following, with strong loyalty to the product. This fact is illustrated in more detail in Tables 3 and 4.

1.4 The dominant purpose of visit to Bornholm is for holidays (Tables 5 and 6), but with a significant proportion of repeat visitors, and visitors from Denmark and other countries, also taking the opportunity to visit friends and relatives (VFR) while on holiday. Overall, 68% of visitors gave the purpose of their trip to Bornholm as 'Holiday' during the third quarter of 1995.

1.5 Visitors were asked about who they were travelling with (Tables 7 and 8) and, apart from those on a day trip who were most likely to be travelling alone, adult couples and families with young children formed the core of the market. This kept average party size to below 3 persons (Tables 9 and 10). There is some discontinuity between the answers to party composition and recorded personal party size in the tables. This arises from the fact that party size has an economic connotation: individuals could be travelling with someone, yet economically just paying for themselves.

1.6 Length of stay analysis is shown in Table 11 to 13. German visitors stay nearly 5 days longer than the domestic market, which accounts for their preponderance when measured in terms of bednights. The evidence suggests that Sweden constitutes a potential short-break market (up to 3 days) for Bornholm, Germany a main long holiday (4 or more days) market and Denmark a main and

additional long holiday market. The absence of a short break market of substance is reflected in an average holiday length of stay of just under 10 days (Table 12), which is comparable to those visiting friends and relatives while on holiday and those visiting friends and relatives only.
1.7 Commensurate with trends word-wide, average lengths of stay have fallen since the 1969 survey. For the domestic market, the change has been from 9.4 days in 1969 to 7.9 days in 1995 (Table 11), for Germany from 16.6 to 12.8 days over the same period and, similarly, for Sweden from 8.1 to 4.8 days.

1.8 Occupational characteristics of visitors are principally professional and managerial, skilled wage earners and retired persons of similar background (Tables 14 and 15). This is also reflected in their educational attainment (Table 16). 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 17). The income bands in Table 18 reveal Swedish visitors to have amongst the lowest gross family incomes and Nowegian visitors amongst the highest. Comparisons should be made with caution due to different taxation systems

Table 1 Visitors by Country Percentages

Country Base: All Visitors	Day 60	Stay 1415	First Visit 519	Repeat Visit 964
Denmark	49	50	17 [2]	83
Sweden	43	10	40	60
Germany	3	35	57	43
Norway [1]	0	2	61	39
Others	5	3	49	51

Note: 1. Small sample size and should be used with caution.
2. These percentages should be read horizontally and not vertically.

Table 2 Visitors by Type of Visit Percentages

Visit Base: All Visitors	Day 60	Stay 1415	Sea 1210	Air 273	All 1483
First	13	36	35	36	35
Repeat	87	64	65	64	65

Table 3 Visitors by Number of Visits Percentages

Previous Visits Base: Repeat Visit	Denmark 346	Sweden 82	Germany 205	Other 17 [1]
1	23	23	35	53
2	14	11	16	6
3	11	7	9	18
4	5	10	9	0
5	8	9	4	0
6-10	13	22	13	12
11-20	9	9	12	0
21-50	9	4	3	12
More than 50	8	5	0	0

Note: 1. Small sample size (includes Norway) and should be used with caution.

Table 4 Visitors by Last Visit Percentages

Last Visit Base: Repeat Visit	Denmark 610	Sweden 95	Germany 202	Other 30 [1]
Earlier this year	25	19	5	27
Last year	22	31	42	17
Within last 2 years	9	15	19	13
Within last 5 years	12	18	14	17
More than 5 year	32	18	20	27

Note: 1. Small sample size (includes Norway) and should be used with caution.

Table 5 **Visitors by Purpose**

Percentages

Purpose **Base: All Visitors**	**Day** **59**	**Stay** **1401**	**First Visit** **519**	**Repeat Visit** **946**
Business conference/meeting/exhibition	22	3	3	5
General business	27	1	1	3
Holiday	36	69	87	57
Holiday/VFR	3	18	7	24
VFR solely	5	3	*	5
Sporting event	0	1	*	1
Education	0	*	*	*
Other (including above combinations)	7	4	2	5

Note: 1. * means less than 0.5%

Table 6 **Purpose by Country**

Percentages

Purpose **Base: All Visitors**	**Denmark** **731**	**Sweden** **165**	**Germany** **497**	**Norway** **29**[1]	**Other** **43**
Business conference/ meeting/exhibition	6	2	*	3	14
General business	4	2	*	0	2
Holiday	51	76	91	86	44
Holiday/VFR	27	9	7	7	35
VFR solely	6	1	0	0	5
Sporting event	1	4	0	0	0
Education	*	1	*	0	0
Other (including above combinations)	5	6	1	3	0

Notes: 1. Small sample size and should be used with caution.
2. * means less than 0.5%

Table 7 **Visitors by Party Composition**

Percentages

Party Composition **Base: All Visitors**	**Day** **59**	**Stay** **1399**	**First Visit** **518**	**Repeat Visit** **945**
Travelling alone	47	11	9	16
Husband/wife/partners only	27	38	45	33
Family group: children under 15	12	27	24	27
Family group: children grown up	2	8	7	8
Family group: children all ages	0	1	1	2
Family relations/friends	0	3	3	3
Family relations/ friends/children	0	2	1	2
Friend/friends	10	8	9	7
School/club/association/course	0	2	1	2
Other	2	1	1	1

Table 8 **Party Composition by Country**
Percentages

Party Composition **Base: All Visitors**	**Denmark** **728**	**Sweden** **165**	**Germany** **498**	**Norway** **29[1]**	**Other** **43**
Travelling alone	17	8	9	3	30
Husband/wife/partners only	29	44	47	31	33
Family group: children under 15	29	16	25	31	21
Family group: children grown up	9	9	6	14	0
Family group: children all ages	2	1	1	3	0
Family relations/friends	4	4	2	0	0
Family relations/friends/children	1	1	1	7	2
Friend/friends	7	12	8	7	14
School/club/association/course	2	4	0	0	0
Other	1	1	1	3	0

Note: 1. Small sample size and should be used with caution.

Table 9 **Visitors by Party Size**
Percentages

Party Size **Base: All Visitors**	**Day** **55**	**Stay** **1387**	**First Visit** **511**	**Repeat Visit** **938**
1	53	17	13	21
2	33	45	50	42
3	4	13	12	13
4	7	17	18	16
5	2	5	4	6
6-10	2	3	3	2
More than 10	0	1	*	*
Average (persons)	1.78	2.69	2.66	2.71

Note: 1. * means less than 0.5%

Table 10 **Party Size by Country**
Percentages

Party Size **Base: All Visitors**	**Denmark** **909**	**Sweden** **167**	**Germany** **501**	**Norway** **28[1]**	**Other** **40**
1	24	15	14	7	30
2	39	53	51	36	40
3	13	6	13	14	8
4	16	17	15	32	18
5	6	6	4	7	2
6-10	2	2	3	0	3
More than 10	1	1	*	4	0
Average (persons)	2.64	2.62	2.59	3.25	2.30

Notes: 1. Small sample size and should be used with caution.
2. * means less than 0.5%

Table 11 **Country by Length of Stay** **Percentages**

Period Base: All Visitors	Denmark 738	Sweden 168	Germany 498	Norway 28[1]	Other 43	All 1475
Day visit	5	17	1	0	7	5
Short stay [2]	13	38	2	7	28	12
Up to one week	46	35	28	64	30	39
One - two weeks	31	9	46	25	28	33
Two - three weeks	4	1	20	4	5	9
More than three weeks	1	1	4	0	2	2
Average (days)	7.88	4.75	12.76	7.18	7.07	9.13

Notes: 1. Small sample size and should be used with caution.
2. Up to three days.

Table 12 **Length of Stay by Purpose** **Percentages**

Period Base: All Visitors	Business 91	Holiday 992	Holiday/VFR 259	VFR solely 49	Other 69
Day visit	35	2	2	10	7
Short stay [1]	50	7	10	29	27
Up to one week	10	39	45	37	49
One - two weeks	6	38	32	16	12
Two - three weeks	0	12	7	4	0
More than three weeks	0	2	4	4	4
Average (days)	2.80	9.80	9.01	9.67	7.18

Note: 1. Up to three days.

Table 13 **Length of Stay by Type of Visit** **Percentages**

Period Base: All Visitors	First Visit 517	Repeat Visit 958	Sea 1204	Air 270
Day visit	2	6	3	11
Short stay [1]	10	13	10	24
Up to one week	44	36	41	29
One - two weeks	37	31	34	29
Two - three weeks	6	11	10	5
More than three weeks	1	3	2	2
Average (days)	8.72	9.36	9.44	7.77

Note: 1. Up to three days.

Table 14 **Respondents' Occupation by Country** **Percentages**

Occupation Base: All Visitors	Denmark 683	Sweden 152	Germany 449	Norway 23[1]	Other 34
Self-employed	4	5	8	0	9
Professional and managerial	30	33	32	57	35
Administrative	13	13	4	4	18
Clerical	4	2	1	0	3
Skilled wage earner	22	19	23	22	15
Unskilled wage earner	5	6	3	0	0
Assisting spouse	1	0	0	0	0
Employment not specified	*	0	0	0	0
Retired	12	18	19	13	18
Student	7	3	5	0	3
Economically inactive[2]	2	1	5	4	0

Notes: 1. Small sample size and should be used with caution.
2. Includes unemployed and home workers.
3. * means less than 0.5%

Table 15 **Spouses' Occupation by Country** **Percentages**

Occupation Base: All Visitors	Denmark 498	Sweden 114	Germany 359	Norway 19[1]	Other 25[1]
Self-employed	3	7	6	0	4
Professional and managerial	32	33	29	60	44
Administrative	12	9	5	5	16
Clerical	2	4	1	5	0
Skilled wage earner	26	24	22	5	0
Unskilled wage earner	5	4	4	5	0
Assisting spouse	2	0	2	5	4
Employment not specified	3	4	8	0	8
Retired	7	9	7	5	8
Student	4	3	4	5	4
Economically inactive[2]	4	5	14	5	12

Notes: 1. Small sample size and should be used with caution.
2. Includes unemployed and home workers.

Table 16 **Respondents' Education by Country** **Percentages**

Education Base: All Visitors	Denmark 662	Sweden 152	Germany 415	Norway 22[1]	Other 40
Up to 9 years	17	16	31	5	10
9 - 12 years	26	26	15	9	8
12 years + vocational	38	24	13	18	33
12 years + academic	19	34	41	68	50

Note: 1. Small sample size and should be used with caution.

Table 17 **Respondents' Age by Country** **Percentages**

Age Base: All Visitors	Denmark 704	Sweden 161	Germany 480	Norway 26[1]	Other 41
16 - 24 years	6	6	6	4	5
25 - 34 years	21	13	14	27	22
35 - 49 years	36	35	30	35	32
50 - 59 years	22	17	26	31	22
60 - 69 years	11	17	16	4	17
Over 69 years	4	12	8	0	2

Note: 1. Small sample size and should be used with caution.

Table 18 **Visitors' Gross Family Income per Annum by Country** **Percentages**

Family Income Base: All Visitors	Denmark 664	Sweden 148	Germany 392	Norway 22[1]	Other 39
Less than 200,000 DKK	18	44	22	9	8
200,000 - 400,000 DKK	43	48	47	55	39
400,000 - 700,000 DKK	35	7	23	32	39
Greater than 700,000 DKK	5	1	7	5	15

Note: 1. Small sample size and should be used with caution.

2. AWARENESS AND INFLUENCES ON THE DECISION TO VISIT BORNHOLM

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

Findings

2.1 The base for the enquiry as to whether visitors had been to Bornholm as a child was those respondents who had been to the island before. Danish visitors were most likely to have come to Bornholm when they were children and about 67% reported that they had visited during that period of their life (Table 19), of which the school trip was the principal reason. The majority of visitors from other counties had not been to Bornholm when they were children: those that had been were more likely to have come with family or friends, rather than a school visit. Table 20 presents the analysis by purpose of visit.

2.1 In asking holiday visitors how they found out about Bornholm, it is common with this type of question that those who have been before or cannot recall exact sources, will tend to attribute this knowledge to 'Always known'. Add to this the importance of word-of-mouth recommendation from friends and relatives, and the majority of respondents are covered. This fact can be plainly seen in Table 21, where the domestic market has 70% of contacts replying 'Always known'. The recommendation of friends or relatives has more significance for foreign visitors. What then matters are the remaining of means communication, and here guide books and brochures are the most important items.

2.3 Having ascertained 'top-of-the-mind' awareness from holiday visitors about marketing communication sources in general, respondents were then asked about whether they had seen specific promotional material used by Destination Bornholm (Table 22). Danish visitors were more likely to have seen a newspaper or magazine article about Bornholm than holidaymakers from elsewhere, but much less likely to have seen the Bornholm 95 brochure; the latter having a high response rate from all other countries. This may be attributed to the greater awareness of the features of Bornholm amongst Danish holidaymakers, which reduces the need to search out information.

2.4 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 (Tables 23 and 24). The highest scores were achieved by general features such as the landscape, nature and the atmosphere of the island,

and the lowest in specific activities such as fishing and golf. This was true of all holiday markets (Table 24), with 75% of Danish visitors and 77% of those from Germany assessing the natural aspects of the island as ‘Very important’ in their decision to visit.

2.5 Other aspects of Bornholm that were considered ‘Very important’ by holidaymakers (apart from those having friends or relatives on the island) and which were solicited in an ‘open-ended’ question, were, in order of importance:

- The weather in terms of sun hours for Denmark as a whole;
- Peaceful atmosphere, relaxing;
- Friendliness of the local people;
- The appeal of being an island;
- Somewhere new and different to go.

Table 19 **Visited as a Child by Country**

Percentages

As child Base: Repeat Visits	Denmark 353	Sweden 88	Germany 199	Other 18 [1]	All 658
No	33	78	80	61	54
With family/friends	19	10	16	28	18
With school	28	3	2	6	16
With family/school	13	3	1	6	8
With club/association	3	1	1	0	2
With above combinations	4	3	1	0	3

Note 1. Small sample size and should be used with caution.

Table 20 **Visited as a Child by Purpose**

Percentages

As child Base: Repeat Visits	Business 47	Holiday 422	Holiday/VFR 121	VFR solely 25 [1]	Other 36
No	47	60	39	52	49
With family/friends	21	14	30	8	19
With school	19	15	17	28	14
With family/school	6	7	10	8	11
With club/association	0	2	3	4	8
With above combinations	6	3	2	0	0

Note: 1. Small sample size and should be used with caution.

Table 21 **Finding Out about Bornholm**

Percentages

Information Source Base: Holidays [1]	Denmark 631	Sweden 147	Germany 490	Other 62	First Visit 496	Repeat Visit 837
Always known	67	60	15	36	28	55
Newspaper/ magazine ad.	2	6	7	7	7	3
Poster	*	3	8	3	6	2
Newspaper/ magazine article	1	4	6	0	5	3
Travel agent	*	4	9	3	7	2
Club/association	2	2	2	2	2	2
Family/friends	32	42	68	57	68	36
Guide book/brochure	3	6	23	11	19	7
TV ad. or programme	1	1	6	2	5	2
Radio	*	1	*	0	*	*
Travel show/ exhibition	*	0	2	2	1	1
Other	2	2	1	5	1	2

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

Table 22 **Seen Bornholm Promotion**

Percentages

Media **Base: Holidays** [1]	**Denmark** **631**	**Sweden** **147**	**Germany** **490**	**Other** **62**	**First Visit** **496**	**Repeat Visit** **837**
Danish Tourist Board brochure	18	18	27	21	23	21
Newspaper/magazine article	27	12	15	15	18	22
Bornholm 95 brochure	19	44	45	45	39	28
Danish TB newsletter [2]	7	0	0	0	1	4

Notes: 1. Includes holidays only, holidays and VFR, and holidays plus other reasons for the visit.
2. Danish questionnaire only.

Table 23 **Aspects of Bornholm and the Holiday Decision**

Percentages

Features **Base: Holidays** [1] **(1333)**	**Very Important** **Score 4**	**Important** **Score 3**	**Less Important** **Score 2**	**Unimportant** **Score 1**	**Average Score**
Beaches	36	37	23	5	3.03
Landscape	67	30	3	1	3.62
Cycle routes	28	24	19	30	2.49
Walking	25	36	25	14	2.73
Fishing towns	35	49	13	3	3.17
Nature	73	24	2	1	3.69
Golf courses	3	1	7	88	1.19
Fishing	5	6	13	76	1.40
Cultural history	20	48	26	7	2.81
Restaurants	11	34	40	16	2.39
Craft/art workers	15	40	33	12	2.59
Atmosphere	68	30	2	2	3.64
Variety of activities	13	32	37	18	2.39

Note: 1. Includes holidays only, holidays and VFR, and holidays plus other reasons for the visit.

Table 24 **Aspects of Bornholm Assessed as Very Important**

Percentages

Features **Base: Holidays** [1]	**Denmark** **631**	**Sweden** **147**	**Germany** **490**	**Other** **62**	**All** **1333**
Beaches	26	31	44	46	35
Landscape	62	43	73	61	64
Cycle routes	18	21	36	43	27
Walking	23	9	30	29	24
Fishing towns	34	34	34	36	34
Nature	70	58	77	56	70
Golf courses	2	4	3	5	3
Fishing	5	0	6	7	5
Cultural history	21	23	15	30	19
Restaurants	7	24	10	11	11
Craft/art workers	13	10	16	23	14
Atmosphere	60	66	73	60	65
Variety of activities	12	12	12	21	12

Note: 1. Includes holidays only, holidays and VFR, and holidays plus other reasons for the visit.

3. ORGANISATION OF THE VISIT

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

Findings

3.1 All holidaymakers reported that were more likely to make their own arrangements than use a travel intermediary either by purchasing a package tour or going to a travel agent (Table 25). Danish visitors and those on a repeat trip, mostly organised their own holiday (78% and 74% respectively). Domestic visitors and those who have been before, plainly benefit from greater familiarity of the product, while those from outside Denmark or who are coming to Bornholm for the first time, make more use of the travel trade.

3.2 Accommodation booking arrangements, as shown in Tables 26 and 27, reveal a similar pattern to the previous section, in that Danish visitors tend to book directly, while foreign visitors are more likely to use a travel agent, a tourist information centre on the island or a summer house booking office.

3.3 Of the 7 tourist information centres on Bornholm, the one at Rønne is the most used, followed by the centre at Allinge (Table 28). This relates to location at the main point of entry and the concentration of tourist accommodation. German visitors are generally the largest users of the tourist information network.

Table 25 **Holiday Booking Patterns** **Percentages**

Booking arrangements Base: Holidays	Denmark 542	Sweden 132	Germany 477	Other 57	First Visit 483	Repeat Visit 725
Organised by myself	78	61	54	60	53	74
Package tour	11	24	12	9	17	10
Travel Agent	10	11	32	23	27	15
Club/association	1	3	1	5	2	1
Other	1	0	*	3	1	*

Note: 1. * means less than 0.5%.

Table 26 **Accommodation Booking Patterns** **Percentages**

Booking arrangements Base: All visitors in paid accommodation	Denmark 403	Sweden 112	Germany 426	Other 49	First Visit 423	Repeat Visit 567
Booked it myself	61	42	35	49	38	53
Travel Agent	16	43	38	27	39	22
Bornholm Tourist Office	8	8	12	10	9	11
Summer house booking office	5	2	12	4	10	6
Family/friends	2	1	2	2	1	2
Through work	4	2	0	0	1	2
Club/association	2	1	*	4	1	1
Chance	2	1	1	0	1	1
Other	*	1	1	4	1	1

Note: 1. * means less than 0.5%.

Table 27 **Accommodation Booking by Purpose** **Percentages**

Booking arrangements Base: All visitors in paid accommodation	Business 47	Holiday 817	Holiday/VFR 68	Other 51
Booked it myself	38	45	77	46
Travel Agent	32	31	9	20
Bornholm Tourist Office	4	9	10	19
Summer house booking office	0	9	0	2
Family/friends	0	2	3	2
Through work	17	1	0	2
Club/association	2	1	2	6
Chance	0	1	0	4
Other	6	1	0	0

Table 28 **Tourist Information Centre Usage** **Percentages**

Information Centre **Base: All Visitors**	**Denmark** **500**	**Sweden** **128**	**Germany** **293**	**Other** **50**
Aakirkeby	7	2	20	13
Gudhjem	15	7	20	9
Hasle	4	3	6	7
Nexø - Dueodde	8	6	30	11
North Bornholm, Allinge	10	10	31	19
Rønne	19	13	35	36
Svaneke	6	7	18	9

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, and were asked to evaluate the list on a five point Likert scale.   The range of the scale was ‘Excellent’= 5, to ‘Poor’= 1.

Findings

4.1 For domestic tourists, staying with friends and relatives proved to be the most popular type of accommodation used (Table 29).   This fact is also true in many other countries.   Foreign tourists were nearly three times as likely to use the hotel sector than Danish visitors, and, similarly, first time visitors were nearly twice as likely to use hotels than those who had been to Bornholm before. Some 41% of tourists from Germany stayed in summer houses (Table 29).

4.2 In the 1969 survey, 16% of Danish visitors used a hotel, compared to 11% now and there was more use of pension and bed and breakfast (B&B) establishments; 24% as against 16% now, if farmhouses and holiday centres are included in the total (Table 29).   Holiday centres were not part of the accommodation stock at the time of the 1969 survey.   Summer house use for Danish tourist was about the same in 1969 as it is now, but there was much less use by German tourist; 25% as compared to 41% in this survey.   In 1969, some 58% of German visitors stayed either in hotels, pensions or B&B establishments, as against 42% today (if holiday centres are included).   A similar pattern emerges when visitors from other countries are considered.   Thus, since 1969 there has been a decline in the use of ‘serviced’ accommodation as the market has moved towards self-catering and this, in itself, has also changed the nature of serviced accommodation, as more properties have developed a self-catering mode of operation.

4.3 For people travelling to Bornholm on business, 76% used hotels (Table 30), while for those coming purely for holiday purposes only 23% use a hotel.   For the latter, the most popular form of accommodation was the summer house (Table 30).   Tourists coming for all other purposes were more likely to stay with friends or relatives.

4.4 Table 31 presents an evaluation by all visitors of their place of accommodation that covers five aspects:

- The physical accommodation;
- Food and beverages;
- Service level;
- Price;
- Value for money.

Using a five point Likert scale, the average score on quality was generally high, but there is some concern on the price level.   This is reflected in the overall value for money score, which links quality to price.

4.5 Tables 32 to 41 examine the different aspects of the visitors' perceptions of their place of stay by country of origin, first or repeat visit and purpose of their trip. Generally, quality variables score well, notably amongst business visitors, but foreign visitors do demonstrate some recognition that prices are on the high side (Table 38). This is particularly true of tourists from Sweden, which must be explained in part by the weak state of the Swedish currency in 1995. There is, however, some recovery of this situation when overall value for money is considered in Table 40. It is to be noted that first time visitors produce lower scores across all aspects of their accommodation than visitors who have been before and who already have a favourable impression of Bornholm and a loyalty to the product. The difference is not large, but is worth bearing in mind in terms of generating future repeat business and growing the market.

Table 29 **Accommodation Usage by Country** **Percentages**

Accommodation Base: All Staying Visitors [1]	Denmark 702	Sweden 140	Germany 495	Other 68	First Visit 507	Repeat Visit 898
Hotel	11	30	32	30	31	16
Guesthouse/Pension	3	11	6	9	6	4
B & B/Private Home	3	2	1	0	3	2
Farmhouse	3	1	2	1	2	2
Youth Hostel	3	2	1	1	2	2
Holiday Centre	7	5	2	6	5	5
Friends and Relatives	29	8	4	16	4	25
Summer House	20	7	42	14	29	25
Camping	9	17	4	4	7	8
Caravan	4	8	4	9	6	4
Other	9	8	4	9	5	8

Note: 1. The base includes multiple accommodation use; about 12% of staying visitors used more than one category of accommodation.

Table 30 **Accommodation Usage by Purpose** **Percentages**

Accommodation Base: All Staying Visitors [1]	Business 59	Holiday 992	Holiday/VFR 254	VFR 44	Other 66	All 1415
Hotel	76	23	4	2	18	21
Guesthouse/Pension	2	6	2	0	9	5
B & B/Private Home	2	2	2	2	6	2
Farmhouse	0	2	2	0	4	2
Youth Hostel	2	3	2	2	0	2
Holiday Centre	2	7	0	0	0	5
Friends and Relatives	3	3	61	86	28	17
Summer House	3	32	19	2	9	26
Camping	2	9	5	2	6	8
Caravan	2	6	2	2	1	5
Other	7	7	6	2	24	7

Note: 1. The base includes multiple accommodation use; about 12% of staying visitors used more than one category of accommodation.

Table 31 **Overall Quality of Place of Stay** **Percentages**

Evaluation Base: All Visitors	Accommodation 847	Food and beverages 519	Service 731	Price level 847	Overall value for money 878
Excellent	33	43	40	19	22
Good	45	37	39	34	40
Average	20	17	17	37	31
Not good enough	2	3	2	9	5
Poor	1	1	2	2	2
Average score[1]	4.05	4.20	4.13	3.58	3.73

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

Table 32 **Quality of Accommodation by Country** **Percentages**

Evaluation Base: All Visitors	Denmark 322	Sweden 101	Germany 383	Other 41	First Visit 380	Repeat Visit 467
Excellent	44	26	25	32	27	38
Good	28	53	55	51	49	41
Average	25	15	16	17	21	18
Not good enough	3	4	2	0	2	3
Poor	1	3	1	0	1	1
Average score[1]	4.13	3.94	4.02	4.15	3.98	4.12

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

Table 33 **Quality of Accommodation by Purpose** **Percentages**

Evaluation Base: All Visitors	Business 51	Holiday 706	Holiday/VFR 43	Other 40	All 840
Excellent	47	31	33	40	33
Good	41	46	40	28	45
Average	12	19	28	25	20
Not good enough	0	3	0	5	2
Poor	0	1	0	3	1
Average score[1]	4.35	4.04	4.05	4.00	4.05

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

Table 34 **Quality of Food and Beverages by Country** **Percentages**

Evaluation Base: All Visitors	Denmark 183	Sweden 86	Germany 221	Other 29[1]	First Visit 247	Repeat Visit 272
Excellent	50	34	40	62	41	46
Good	25	38	47	24	39	35
Average	21	20	12	14	16	17
Not good enough	3	6	1	0	3	2
Poor	1	2	0	0	1	*
Average score[3]	4.19	3.95	4.25	4.48	4.15	4.23

Notes: 1. Small sample size and should be used with caution.
2. * means less than 0.5%
3. The range was 'Excellent'=5 to 'Poor'=1

Table 35 **Quality of Food and Beverages by Purpose** **Percentages**

Evaluation Base: All Visitors	Business 46	Holiday 107	Holiday/VFR 29[1]	Other 30[1]	All 512
Excellent	61	40	55	47	43
Good	24	40	24	27	37
Average	9	17	14	27	17
Not good enough	7	2	3	0	3
Poor	0	1	3	0	1
Average score[2]	4.39	4.16	4.24	3.70	4.20

Notes: 1. Small sample size and should be used with caution.
2. The range was 'Excellent'=5 to 'Poor'=1

Table 36 **Quality of Service by Country** **Percentages**

Evaluation Base: All Visitors	Denmark 306	Sweden 108	Germany 276	Other 41	First Visit 326	Repeat Visit 405
Excellent	49	28	37	39	34	45
Good	25	45	50	46	44	34
Average	22	20	10	12	17	17
Not good enough	3	5	1	2	3	2
Poor	2	2	2	0	2	2
Average score[1]	4.17	3.93	4.18	4.22	4.06	4.20

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

Table 37 **Quality of Service by Purpose** **Percentages**

Evaluation Base: All Visitors	Business 52	Holiday 595	Holiday/VFR 40	Other 36	All 1382
Excellent	60	37	50	56	40
Good	33	41	33	24	39
Average	8	18	15	12	17
Not good enough	0	3	3	3	2
Poor	0	2	0	6	2
Average score[1]	4.52	4.08	4.30	4.19	4.13

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

Table 38 **Price Level by Country** **Percentages**

Evaluation Base: All Visitors	Denmark 338	Sweden 100	Germany 367	Other 42	First Visit 376	Repeat Visit 471
Excellent	30	10	9	24	13	22
Good	24	29	46	19	35	33
Average	39	40	35	43	38	37
Not good enough	5	19	10	10	12	7
Poor	2	2	1	5	2	1
Average score[1]	3.76	3.26	3.52	3.48	3.45	3.68

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

Table 39 **Price Level by Purpose** **Percentages**

Evaluation Base: All Visitors	Business 42	Holiday 711	Holiday/VFR 49	Other 38	All 840
Excellent	26	17	33	26	19
Good	36	33	35	34	34
Average	33	39	25	26	37
Not good enough	5	9	8	5	9
Poor	0	2	0	8	2
Average score[1]	3.83	3.54	3.92	3.66	3.58

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

Table 40 **Overall Value for Money by Country** **Percentages**

Evaluation Base: All Visitors	Denmark 330	Sweden 98	Germany 405	Other 45	First Visit 392	Repeat Visit 486
Excellent	38	9	11	24	15	27
Good	27	43	50	44	42	39
Average	29	37	31	29	34	28
Not good enough	4	7	6	2	6	4
Poor	3	4	2	0	3	2
Average score[1]	3.93	3.46	3.61	3.91	3.60	3.84

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

Table 41 **Overall Value for Money by Purpose** **Percentages**

Evaluation Base: All Visitors	Business 45	Holiday 740	Holiday/VFR 50	Other 37	All 872
Excellent	38	20	32	32	22
Good	36	41	40	27	40
Average	20	33	20	27	31
Not good enough	7	5	4	3	5
Poor	0	2	4	11	2
Average score[1]	4.04	3.70	3.92	3.68	3.73

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

5. VISITS TO ATTRACTIONS

Visitors were presented with a long list of the attractions on Bornholm and were asked to say whether they had visited them or not, and, if they had been to the attraction, how did they rank their experience on the same five point Likert scale as before. For ease of presentation the list of attractions has been divided into four categories, each analysed by country of origin and purpose of visit:

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

Findings

5.1 As shown in Tables 42 and 43, the significant heritage attractions for all visitors are Hammershus Castle and Østerlars round church. The percentages shown in these tables are estimates of the visitor market penetration rate of each listed attraction during the period July - September 1995. As would be expected, those visitors coming solely for holiday purposes have a higher propensity to visit attractions than others (Table 43).

5.2 Natural attractions appear to be of most significance to domestic tourists and visitors from Germany (Table 44).

5.3 Museums are generally not well attended during the summer period (Tables 46 and 47), the only exception being the Art Museum and, for German visitors, the Bornholms Museum and the Farm Museum (Table 46). The latter are more likely to visit museums than others.

5.4 Of the remaining attractions, glass blowing and visiting a fish smoke house are the most popular (Tables 48 and 49).

5.5 Although each attraction has been evaluated separately by the visitors, for reasons of discretion, only global values for the groupings of the attractions are shown in Table 50. Average scores for each of the groups are high and only craft and the remaining attractions are in a position where less than 50% of the visitors thought that they were anything but excellent.

5.6 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 ten or more respondents:

- Døndalen;
- Hammers Point;
- Almindingen;
- Rocking Stone;
- Wind mills;
- Small fishing villages.

Table 42 **Visits to Heritage Attractions by Country** **Percentages**

Attraction Base: All Visitors	Denmark 731	Sweden 165	Germany 497	Other 72
Hammershus Castle	60	49	80	64
Hammershus exhibition	14	10	12	22
Østerlars round church	37	26	62	33
Other churches	26	19	57	24

Table 43 **Visits to Heritage Attractions by Purpose** **Percentages**

Attraction Base: All Visitors	Business 91	Holiday 995	Holiday/VFR 260	Other 119	All 1465
Hammershus Castle	32	75	49	37	65
Hammershus exhibition	5	15	8	7	13
Østerlars round church	24	53	25	17	43
Other churches	13	44	21	12	35

Table 44 **Visits to Natural Attractions by Country** **Percentages**

Attraction Base: All Visitors	Denmark 731	Sweden 165	Germany 497	Other 72
Christiansø	16	7	23	11
Gardens	3	4	12	1
Randkløve Skaar	7	0	7	1
Paradisbakkerne	28	8	34	14
Ekkodalen	34	9	22	17
Rytterknægten	28	9	19	13
Helligdomsklipperne	39	27	55	28
Jons Kapel	23	15	41	10

Table 45 **Visits to Natural Attractions by Purpose** **Percentages**

Attraction Base: All Visitors	Business 91	Holiday 995	Holiday/VFR 260	Other 119	All 1465
Christiansø	2	22	10	4	17
Gardens	1	8	4	1	6
Randkløve Skaar	1	7	5	5	6
Paradisbakkerne	4	33	21	13	27
Ekkodalen	1	33	17	12	26
Rytterknægten	7	26	15	11	22
Helligdomsklipperne	11	52	26	15	42
Jons Kapel	4	34	18	8	27

Table 46 **Visits to Museums by Country** **Percentages**

Museum Base: All Visitors	Denmark 731	Sweden 165	Germany 497	Other 72
Bornholms Art Museum	18	15	24	15
Bornholms Museum	5	4	12	6
Gudhjem Museum	3	3	6	1
Nexø Museum	2	2	6	1
Martin Andersen Nexø Museum	2	1	4	1
Vilh. Herold Museum	0	0	1	0
Defence Museum	2	2	2	3
Quarry Museum	5	1	7	3
Farm Museum	6	5	10	1
Automobile Museum	2	2	5	0
Erichsens Gaard	4	2	7	3

Table 47 **Visits to Museums by Purpose** **Percentages**

Museum Base: All Visitors	Business 91	Holiday 995	Holiday/VFR 260	Other 119	All 1465
Bornholms Art Museum	15	21	17	14	19
Bornholms Museum	4	7	10	7	8
Gudhjem Museum	2	4	3	4	4
Nexø Museum	0	4	3	3	4
Martin Andersen Nexø Museum	2	3	2	2	3
Vilh. Herold Museum[1]	0	0	1	0	*
Defence Museum	1	2	3	2	2
Quarry Museum	1	6	4	3	5
Farm Museum	0	8	7	3	7
Automobile Museum	1	4	3	0	3
Erichsens Gaard	2	5	4	4	5

Notes: 1. * means less than 0.5%

Table 48 **Visits to Craft and Other Attractions by Country** **Percentages**

Attraction Base: All Visitors	Denmark 731	Sweden 165	Germany 497	Other 72
Glass factory/shop	51	35	70	53
Ceramic factory/shop	19	19	34	36
Art galleries	17	19	30	29
Brændesgårdshaven	28	9	18	26
Fish smoke house	53	45	81	50
Zoo	5	4	10	10
A lighthouse	23	16	31	13

Table 49 **Visits to Craft and Other Attractions by Purpose** **Percentages**

Attraction Base: All Visitors	Business 91	Holiday9 95	Holiday/VFR 260	Other 119	All 1465
Glass factory/shop	25	64	47	35	55
Ceramic factory/shop	2	29	22	14	25
Art galleries	7	28	12	10	22
Brændesgårdshaven	3	24	25	12	22
Fish smoke house	14	71	51	34	61
Zoo	0	9	5	3	7
A lighthouse	3	31	13	10	24

Table 50 **Global Evaluation of Attractions**

Attraction Group Base: All Visitors	Excellent Score 5	Average Score	Range [1]
Heritage attractions	57%	4.52	4.36 - 4.59
Museums	54%	4.47	3.89 - 4.58
Natural attractions	58%	4.42	4.30 - 4.68
Craft and other attractions	43%	4.23	3.69 - 4.33

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

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. They were also asked to rank the quality of the activity on the same five point Likert scale as attractions. Activities were grouped into the following broad categories and analysed by country of origin and purpose of visit:

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

Findings

6.1 The most popular water based activities were going to the beach and swimming (Tables 51 and 52). Boat trips were also popular, particularly for tourists who had only come for a holiday.

6.2 To complement water activities such as windsurfing or fishing (Table 51), visitors were asked whether they had played golf, taken a scenic air flight or had gone to the horseracing. As can be seen in Tables 53 and 54, participation in specific activities is relatively small.

6.3 Many leisure tourists are compulsive shoppers, so it is not surprising that shopping is an important activity, particularly for those coming solely for holidays, where 51% of respondents reported that they had gone on shopping trips (Tables 55 and 56). Secondly, given that there is a considerable amount of self-catering amongst holidaymakers and there are many people on holiday who are visiting friends and relatives, eating out is also a popular form of entertainment.

6.4 Commensurate with the image of Bornholm as a holiday island where life proceeds at a leisurely pace, Tables 57 and 58 indicate that going for walks, just relaxing and driving around are common general recreational activities. Cycling is also important, particularly for the German market (Table 57).

6.5 All activities generated a high level of satisfaction and (with the exception of entertainment) achieved scores that were greater than those for attractions (Table 59).

6.6 Other activities recorded by visitors, but only for very small numbers, were horseriding, mini-golf and going to town and harbour fairs.

Table 51 Participation in Water Based Activities by Country — Percentages

Activity Base: All Visitors	Denmark 728	Sweden 165	Germany 497	Other 72
Going to the beach	48	48	57	65
Swimming in the sea	37	42	58	49
Swimming in the pool	14	6	10	13
Windsurfing	1	1	3	1
Boat trips	10	5	18	17
Fishing	2	0	5	1

Table 52 Participation in Water Based Activities by Purpose — Percentages

Activity Base: All Visitors	Business 91	Holiday 995	Holiday/VFR 260	Other 116	All 1462
Going to the beach	15	56	58	29	52
Swimming in the sea	10	49	50	27	45
Swimming in the pool	2	14	8	4	12
Windsurfing	0	2	2	0	2
Boat trips	4	15	9	6	12
Fishing	0	3	5	1	3

Table 53 Participation in Specific Activities by Country — Percentages

Activity Base: All Visitors	Denmark 728	Sweden 165	Germany 497	Other 72
Scenic air flight	1	1	2	0
Golf	1	3	3	1
Horseracing	2	1	6	4

Table 54 Participation in Specific Activities by Purpose — Percentages

Activity Base: All Visitors	Business 91	Holiday 995	Holiday/VFR 260	Other 116	All 1462
Scenic air flight	0	2	1	0	1
Golf	0	2	1	3	2
Horseracing	0	4	1	3	3

Table 55 Participation in Entertainment Activities by Country Percentages

Activity Base: All Visitors	Denmark 728	Sweden 165	Germany 497	Other 72
Music recitals	3	4	9	4
Going to the cinema	2	1	1	0
Eating out	44	45	53	50
Shopping	36	32	57	36

Table 56 Participation in Entertainment Activities by Purpose Percentages

Activity Base: All Visitors	Business 91	Holiday 995	Holiday/VFR 260	Other 116	All 1462
Music recitals	2	6	5	2	5
Going to the cinema	0	1	2	0	1
Eating out	21	53	42	26	47
Shopping	7	51	37	15	43

Table 57 Participation in General Recreational Activities by Country Percentages

Activity Base: All Visitors	Denmark 728	Sweden 165	Germany 497	Other 72
Cycling	15	18	48	33
Guided coach tour	2	8	15	4
Guided walks	3	2	6	1
Walks on my/our own	24	18	40	28
Just relaxing	43	42	66	44
Driving around	50	34	57	51

Table 58 Participation in General Recreational Activities by Purpose Percentages

Activity Base: All Visitors	Business 91	Holiday 995	Holiday/VFR 260	Other 116	All 1462
Cycling	4	23	23	9	21
Guided coach tour	10	9	2	7	7
Guided walks	0	5	2	4	4
Walks on my/our own	3	34	26	13	29
Just relaxing	5	56	56	59	44
Driving around	14	54	57	28	50

Table 59 — Global Evaluation of Activities

Activity Base: All Visitors	Excellent Score 5	Average Score	Range [1]
Waterside Activities	61%	4.46	4.14 - 4.54
Specific Activities	57%	4.47	4.40 - 4.68
Entertainment	41%	4.21	4.12 - 4.56
General Recreational Activities	71%	4.67	4.51 - 4.77

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

7. TRANSPORT

Visitors were asked to name the three most important methods they used for travelling around Bornholm. The results were then cumulated and tabulated by country of origin, first or repeat trip and purpose of visit.

Findings

7.1 By far the most popular mode of transport used for travelling about the island is the car (Table 60). Bicycle use is also high when compared to many other destinations. German tourists are particularly eager to use a bicycle and proceed on foot in order to move about on the island. Not everyone sees cycling as an activity to engage in, as opposed to a means of transport, which accounts for the differences between the results in Table 57 and those in Table 60.

7.2 Use of the car is most frequent, at 92%, amongst those coming on holiday and visiting friends and relatives, and those solely visiting friends and relatives (Table 60).

Table 60 **Transport Mode by Country** **Percentages**

Transport Base: All Visitors [1]	Denmark 688	Sweden 160	Germany 493	Other 67	First Visit 506	Repeat Visit 902
Public Bus	12	8	26	17	20	15
Coach Tour	6	11	10	9	13	6
Taxi	5	0	7	5	5	5
Car	81	54	75	58	70	78
Motorbike	1	1	*	1	1	1
Bicycle	23	23	53	38	38	32
On foot	36	29	56	27	45	41
Other	2	0	0	0	1	2

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

Table 61 **Transport Mode by Purpose** **Percentages**

Transport Base: All Visitors [1]	Business 83	Holiday 955	Holiday/VFR 239	VFR solely 48	Other 70	All 1395
Public Bus	19	18	13	19	9	17
Coach Tour	28	8	2	0	20	8
Taxi	17	5	3	6	7	5
Car	37	75	92	92	57	77
Motorbike	0	0	0	0	1	1
Bicycle	5	40	31	10	16	34
On foot	13	46	44	23	33	42
Other	10	0	0	0	9	2

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

8. VISITOR EXPENDITURE

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

Findings

8.1 Visitors from Germany stay the longest on average and therefore tend to spend the most (Table 62). When comparisons are made on the basis of expenditure per person per day, those on an inclusive tour from Sweden record the highest daily spending (Table 63). It is also the case that expnditure tends to be higher on a package tour, at an average of DKK 3.945 per person per trip, than for those travelling under their own arrangements, at an average of DKK 3.011 per person per trip. This is reflective of the fact that visitors on an inclusive tour are more likely to be using serviced accommodation rather than self-catering.

8.2 Tourists coming on business or on holiday spend more than those coming to Bornholm for other purposes (Table 64). As people arriving for business have the shortest length of stay and are the ones most likely to use hotels, so their average expenditure per day is higher than all others, at DKK 778 per person if travelling independently and DKK 934 per person if an inclusive trip was booked (Table 65).

Table 62 Expenditure per Person per Trip by Country DDK

Country Base: All Visitors	Independent 1047	Inclusive 169	All 1216
Denmark	2.104	2.405	2.135
Sweden	1.484	2.521	1.721
Germany	5.122	6.194	5.304
Norway	3.075	2.250 [1]	3.052
Other	2.830	2.367 [1]	2.796
All	3.011	3.945	3.137

Note: 1. Small sample size and should be used with caution.

Table 63 Expenditure per Person per Day by Country DDK

Country Base: All Visitors	Independent 1035	Inclusive 166	All 1201
Denmark	260	337	292
Sweden	278	574	337
Germany	357	560	384
Norway	376	321 [1]	375
Other	371	296 [1]	365
All	311	479	331

Note: 1. Small sample size and should be used with caution.

Table 64 Expenditure per Person per Trip by Purpose DDK

Country Base: All Visitors	Independent 1047	Inclusive 169	All 1216
Business	2.748	4.669	2.834
Holiday	3.540	4.044	3.627
Holiday/VFR	1.667	2.334	1.671
VFR	995	-	995
Others	2.278	2.160	2.260

Table 65 Expenditure per Person per Day by Purpose DDK

Country Base: All Visitors	Independent 1035	Inclusive 166	All 1201
Business	778	934	788
Holiday	336	483	357
Holiday/VFR	201	292	201
VFR	168	-	168
Others	270	373	279

Note: 1. Small sample size and should be used with caution.

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

Findings

9.1 As a holiday destination, Bornholm is highly ranked by all visitors, without exception (Table 66). However, there is some concern over value for money amongst Swedish and German visitors (Table 67): relatively few people from Germany were prepared to award a score of 'Excellent' to this question.

9.2 When the overall evaluation of Bornholm is analysed by purpose, the same high scores as before are obtained (Table 68), which demonstrates the products strengths of the island against a background of a good summer. But when value for money is considered, the average scores fall across all categories (Table 69). People travelling on business and visiting friends and relatives are more critical than those on holiday and, given that the island is primarily a holiday destination, greater weight should be attached to the responses from the latter rather than the former.

9.3 Visitors made many suggestions as to how Bornholm might be improved as a destination, but only some of the most common ones are reported on here. Many of these suggestions read in the manner of a complaint, but it must be borne in mind that while they are obviously of concern to the respondent, they have to be taken against the setting of Tables 66 to 69, where visitors have shown themselves to be very satisfied with the overall tourist product. In order of importance, the ten most frequent suggestions for improving the island are:

- Better value for money;
- Bornholm must be kept as it is;
- Cheaper ferry tickets;
- Remove beach seaweed and other pollution;
- More cycle paths and separated from the roads;
- Cheaper and better public transport, with more departures;
- Good restaurants too expensive;
- Cheaper and better overnight stopping places;
- Do not bring too many tourists;
- Improved tourist map, with signage for cycle and foot paths.

Clearly, many of the above comments are to do with price and it must be expected that some visitors will be very difficult to please in this situation.

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

- The landscape and nature;
- Local hospitality and friendliness;
- Everything works (*in a tourism sense*), don't change it;
- Well marked cycle, foot and jogging paths;
- Clean and nice island;
- Quiet and harmonious, with a good atmosphere, and nice that Bornholm is a small island;
- Houses and gardens are very well kept;
- Good for family holidays;
- Not as crowded as expected: tourist are well scattered around the island;
- Residents have a good knowledge of languages.

9.5 When asking visitors what they disliked about Bornholm, they tended to repeat the suggestions already made for improvements, save that the ranking, in terms of significance, was changed. Top of their agenda for dislikes are seaweed on the beaches, lack of value for money, the danger of too many tourists spoiling the product and the cost and availability of public transport. Beyond this, there are a whole series of individual dislikes that relate to the personal experiences of the respondent. These range from poor room cleaning at the place of accommodation, lack of facilities in public places, such as car parking, litter bins and signage, unfriendly staff in some tourist businesses, to concerns that the private sector is over-commercialising the product. These latter comments serve to amplify the complex nature of the tourist purchase, which involves the visitor coming into contact with a great variety of people and places, so that a poor experience at one service encounter can colour the visitor's whole attitude to the destination.

9.6 Tables 70 and 71 examine the probability that visitors will return to Bornholm, segmented by country of origin and purpose of visit. Danish visitors show the highest likelihood of returning. Repeat visitors, who know the island, show a high propensity to return, but first time visitors are much less sure (Table 70). Some 60% of visitors coming solely for a holiday indicated that they are either likely or certain to return, while, as would be expected, about 90% of those who visit friends or relatives on the island, have a strong preference to come back (Table 71).

9.7 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 by country of origin, first or repeat visit and purpose of stay in Tables 72 and 73. There are possibilities of multiple answers here, in that the same respondent could be coming back several times within the time frame given. The basis of percentages is 'All Visitors' and the answers reported are those saying 'Certain' or 'Likely' only. Thus, 42% of repeat visitors indicated that they were either certain or likely to return next year, whereas only 13% of first time visitors gave such an indication (Table 72). When the analysis is carried out according to trip purpose, those who have friends or relatives on Bornholm are most likely to come again next year (Table 73).

Table 66 **Bornholm as a Holiday Destination by Country** **Percentages**

Evaluation Base: All Visitors	Denmark 667	Sweden 156	Germany 486	Other 67	First Visit 505	Repeat Visit 871
Excellent	82	72	78	72	71	83
Good	15	24	21	24	26	14
Average	3	3	*	5	2	2
Not good enough	0	1	0	0	*	0
Poor	*	0	*	0	*	0
Average score[2]	4.78	4.69	4.77	4.67	4.68	4.81

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

Table 67 **Value for Money by Country** **Percentages**

Evaluation Base: All Visitors	Denmark 585	Sweden 150	Germany 477	Other 65	First Visit 505	Repeat Visit 871
Excellent	49	23	4	29	19	34
Good	27	37	51	48	43	36
Average	20	27	39	20	33	25
Not good enough	4	11	5	3	5	5
Poor	1	3	1	0	1	1
Average score[1]	4.19	3.67	3.54	4.03	3.73	3.96

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

Table 68 **Bornholm as a Holiday Destination by Purpose** **Percentages**

Evaluation Base: All Visitors	Business 62	Holiday 950	Holiday/VFR 247	VFR 41	Other 68	All 1368
Excellent	61	79	85	68	76	79
Good	29	19	13	22	16	19
Average	10	1	2	10	5	2
Not good enough	0	0	*	0	0	*
Poor	0	*	0	0	0	*
Average score[2]	4.52	4.77	4.82	4.59	4.75	4.76

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

Table 69 **Value for Money by Purpose** **Percentages**

Evaluation Base: All Visitors	Business 52	Holiday 921	Holiday/VFR 207	VFR 30[1]	Other 61	All 1271
Excellent	25	25	40	37	41	28
Good	31	41	34	23	28	38
Average	33	29	23	30	20	28
Not good enough	12	5	3	10	8	5
Poor	0	1	1	0	3	1
Average score[2]	3.69	3.83	4.10	3.87	3.95	3.98

Notes: 1. Small sample size and should be used with caution
2. The range was Excellent=5 to Poor=1

Table 70 **Probability of Returning by Country** **Percentages**

Probability Base: All Visitors	Denmark 676	Sweden 157	Germany 489	Other 68	First Visit 506	Repeat Visit 884
Certain	44	33	28	29	15	48
Likely	31	36	30	29	33	30
Maybe	20	24	35	24	39	18
Unlikely	5	6	7	13	11	3
Certainly not	1	2	1	4	2	1

Table 71 **Probability of Returning by Purpose** **Percentages**

Probability Base: All Visitors	Business 63	Holiday 958	Holiday/VFR 252	VFR 41	Other 68	All 1382
Certain	27	27	65	76	47	36
Likely	37	33	25	15	31	31
Maybe	25	32	7	5	19	26
Unlikely	8	7	2	5	0	6
Certainly not	3	1	1	0	1	1

Table 72 **Timing of Return by Country** **Percentages**

Timing[1] Base: All Visitors	Denmark 676	Sweden 157	Germany 489	Other 68	First Visit 506	Repeat Visit 884
This year	4	1	0	3	*	3
Next year	36	39	26	18	13	42
Next 2 years	17	27	27	19	23	21
Next 5 years	24	25	24	28	27	23

Notes: 1. The answers refer to 'Certain' and 'Likely' only as a percentage of all respondents.
2. * means less than 0.5%

Table 73 **Timing of Return by Purpose** **Percentages**

Timing[1] Base: All Visitors	Business 63	Holiday 958	Holiday/VFR 252	VFR 41	Other 68	All 1382
This year	8	1	5	7	3	2
Next year	37	21	59	71	24	48
Next 2 years	21	22	21	10	22	22
Next 5 years	24	27	17	5	19	24

Notes: 1. The answers refer to ‘Certain’ and ‘Likely’ only as a percentage of all respondents.

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