SURVEY OF VISITORS TO BORNHOLM

OCTOBER - DECEMBER 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** **4th Qtr 1995**

Respondent Category	Base	Percentage
Day visitors	75	8
Stay visitors	331	36
Bornholm residents	510	56

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

Fourth Quarter 1995

This report covers the fourth quarter of 1995. The frequency tables in the report are based on the statistics shown in Table A. In total, 74% of the sample were departing by sea, leaving the remainder departing by air: 53% of contacts were male and 47% 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 attitudinal

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

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, 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

Bornholms Turistforening, (1970), *Turistanalyse på Bornholm 1969*, Bornholms Turistforening, Rønne.

FORSA, (1993), Bornholm som Feriemål for Tyske Turister, Gesellschaft für Sozialforschung und Statistische Analysen mbH, Dortmund.

Hasløv and Kjærsgaard I/S, (1995), Sommerhusprojekt Bornholm. Notat vedr spørgeskemaundersøgelsen 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 in the fourth quarter 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.

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 88% of visitors interviewed had been to Bornholm before (Table 2), a statistic that rose to 97% in the case of Danish visitors (Table 1). Note that the section covering the division between first and repeat visit should be read horizontally in Table 1 and not vertically. Clearly, Bornholm has a regular repeat following especially among tourists from Denmark and Sweden. 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). Overall, 30% of visitors gave the purpose of their trip to Bornholm as 'Holiday' during the fourth quarter of 1995. 22% of the tourists visit the island with the purpose of seeing friends and relatives. For almost half of the day visitors the purpose of visit to Bornholm are business conference/meeting/exhibition (Table 5).

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 formed the core of the market. This kept average party size near 2 persons. 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 3.5 days longer than the domestic market. The evidence suggests that Sweden constitutes a potential short-break market (up to 3 days) for Bornholm, Germany constitutes a holiday market of medium length (3 days to two weeks) and Denmark is a short and medium long holiday market (up to two weeks).

1.7 The occupational characteristics of the greater part of the visitors are: professional and managerial, administrative salaried employees, skilled wage earners and retired persons of similar background (Tables 14 and 15). Among the tourists from Sweden comparatively many has retired. The occupational characteristics is reflected in the tourists 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 German 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 75	Stay 331	First Visit 48	Repeat Visit 345
Denmark	60	72	3	97
Sweden	40	7	10	90
Germany	0	14	50	50
Other[1]	0	7	52	48

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

Table 2 **Visitors by Type of Visit** **Percentages**

Visit Base: All Visitors	Day 74	Stay 319	Sea 293	Air 100	All 393
First	5	14	15	5	12
Repeat	95	86	85	95	88

Table 3 **Visitors by Number of Visits** **Percentages**

Previous Visits Base: Repeat Visit	Denmark 128	Sweden 38	Other 29[1]
1	10	5	17
2	9	5	7
3	9	13	17
4	9	5	10
5	6	5	3
6-10	15	21	17
11-20	9	16	21
21-50	19	11	7
More than 50	13	18	0

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

Table 4 **Visitors by Last Visit** **Percentages**

Last Visit Base: Repeat Visit	Denmark 265	Sweden 46	Germany 22[1]	All 343
Earlier this year	72	63	32	68
Last year	8	15	18	10
Within last 2 years	5	13	27	8
Within last 5 years	5	4	18	6
More than 5 year	10	4	5	9

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

Table 5 **Visitors by Purpose** **Percentages**

Purpose Base: All Visitors	Day 73	Stay 318	First Visit 48	Repeat Visit 340
Business conference/meeting/exhibition	22	8	4	11
General business	27	7	6	12
Holiday	29	30	73	24
Holiday/VFR	6	21	6	20
VFR solely	3	26	2	24
Sporting event	1	1	0	1
Education	0	1	0	1
Other (including above combinations)	12	7	8	8

Table 6 **Purpose by Country** **Percentages**

Purpose Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[1]
Business conference/ meeting/exhibition	13	8	0	5
General business	12	16	2	5
Holiday	16	50	74	62
Holiday/VFR	20	6	17	24
VFR solely	29	8	0	0
Sporting event	1	2	0	0
Education	1	0	0	0
Other (including above combinations)	8	10	7	5

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

Table 7 **Visitors by Party Composition** **Percentages**

Party Composition Base: All Visitors	Day 74	Stay 318	First Visit 48	Repeat Visit 340
Travelling alone	45	32	10	38
Husband and wife/partners	24	31	44	27
Family group: children under 15	4	17	15	14
Family group: children grown up	0	7	8	5
Family group: children all ages	8	4	6	5
Family relations/friends	3	2	6	2
Family relations/ friends/children	3	1	0	1
Friend/friends	10	5	8	6
School/club/association/course	0	*	0	*
Other	4	2	2	2

Note: 1. * means less than 0.5%

Table 8 **Party Composition by Country** **Percentages**

Party Composition Base: All Visitors	Denmark 276	Sweden 51	Germany 46	Other 20[1]
Travelling alone	43	14	13	10
Husband and wife/partners	24	43	37	50
Family group: children under 15	15	4	24	5
Family group: children grown up	4	4	13	5
Family group: children all ages	4	8	9	0
Family relations/friends	2	6	0	5
Family relations/friends/children	1	2	2	0
Friend/friends	4	20	2	20
School/club/association/course	3	0	0	0
Other	*	0	0	5

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

Table 9 **Visitors by Party Size** **Percentages**

Party Size Base: All Visitors	Day 75	Stay 321	First Visit 47	Repeat Visit 338
1	49	36	15	42
2	35	38	49	35
3	9	8	6	8
4	4	11	13	9
5	1	5	13	4
More than 5	1	3	4	2
Average (persons)	1.79	2.27	2.87	2.04

Table 10 **Party Size by Country** **Percentages**

Party Size Base: All Visitors	Denmark 651	Sweden 55	Germany 48	Other 21[1]
1	43	18	10	19
2	35	60	33	57
3	8	11	13	5
4	8	9	23	10
5	4	0	10	5
More than 6	2	2	10	5
Average (persons)	2.12	2.20	3.29	2.52

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

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

Period Base: All Visitors	Denmark 280	Sweden 53	Germany 46	Other 21[1]	All 400
Day visit	16	57	0	0	19
Short stay [2]	29	28	4	5	25
Up to one week	41	6	70	57	41
One - two weeks	12	4	26	33	14
Two - three weeks	*	6	0	5	1
More than three weeks	1	0	0	0	1
Average (days)	4.54	2.75	8.11	7.33	4.86

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

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

Period Base: All Visitors	Business 84	Holiday 116	Holiday/VFR 70	VFR solely 83	Other 36
Day visit	43	18	6	2	28
Short stay [1]	35	11	19	40	28
Up to one week	17	48	56	46	33
One - two weeks	5	19	20	12	8
Two - three weeks	1	3	0	0	0
More than three weeks	0	1	0	0	3
Average (days)	2.65	6.28	5.54	4.64	4.25

Note: 1. Up to three days.

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

Period Base: All Visitors	First Visit 48	Repeat Visit 342	Sea 300	Air 100
Day visit	8	21	16	27
Short stay [1]	13	27	20	39
Up to one week	58	38	45	28
One - two weeks	21	13	17	5
Two - three weeks	0	1	2	0
More than three weeks	0	1	*	1
Average (days)	6.71	4.54	5.34	3.41

Notes: 1. Up to three days.
2. * means less than 0.5%

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

Occupation Base: All Visitors	Denmark 235	Sweden 41	Germany 41	All 335
Self-employed	1	5	12	3
Professional and managerial	22	12	10	19
Administrative	27	22	27	25
Clerical	5	0	0	4
Skilled wage earner	18	24	24	21
Unskilled wage earner	6	0	5	5
Assisting spouse	*	0	0	*
Employment not specified	0	0	0	0
Retired	13	37	7	14
Student	6	0	12	6
Economically inactive[1]	3	0	2	2

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

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

Occupation Base: All Visitors	Denmark 142	Sweden 25[2]	Germany 29[2]	All 211
Self-employed	2	16	14	6
Professional and managerial	19	8	10	17
Administrative	20	4	28	18
Clerical	6	4	0	4
Skilled wage earner	26	20	31	26
Unskilled wage earner	6	0	0	4
Assisting spouse	2	4	0	1
Employment not specified	0	0	0	0
Retired	16	40	10	19
Student	1	0	0	1
Economically inactive[1]	3	4	7	3

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

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

Education Base: All Visitors	Denmark 245	Sweden 42	Germany 42	All 345
Up to 9 years	17	21	24	19
9 - 12 years	22	24	12	20
12 years + vocational	36	33	19	34
12 years + academic	25	21	45	27

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

Age Base: All Visitors	Denmark 265	Sweden 49	Germany 45	All 378
16 - 24 years	8	0	7	6
25 - 34 years	23	12	16	21
35 - 49 years	36	18	31	32
50 - 59 years	20	20	38	22
60 - 69 years	8	33	9	12
Over 69 years	6	16	0	7

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

Family Income Base: All Visitors	Denmark 246	Sweden 46	Germany 39	All 348
Less than 200,000 DKK	15	46	18	20
200,000 - 400,000 DKK	40	41	46	42
400,000 - 700,000 DKK	37	13	23	32
Greater than 700,000 DKK	7	0	13	6

2. AWARENESS AND INFLUENCES ON THE DECISION TO VISIT BORNHOLM

Visitors were asked about the extent of their awareness of Bornholm and how they found out about the island. An important feature of this is school travel (lejrskole), which was made an integral part of the Danish school system in 1953. The contrasting geography of the island in relation to the rest of Denmark has made it a notable destination for school trips, hence visitors were first asked whether they had been to the island when they were children. Questions were then put to 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 when they were children. Some 59% stated that they had visited the island as children (Table 19). The Danish visitors came to the island with school and with family or friends The majority of visitors from other counties had not been to Bornholm when they were children: those that had been were likely to have come with family or friends. Table 20 presents the analysis by purpose of visit.

2.2 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. The domestic market has 30% and the Swedish market has 47% of contacts replying 'Always known'. The recommendation of friends or relatives has more significance for German visitors: some 64% have become aware of Bornholm because of friends and relatives. 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 or the Danish Tourist Board brochure than holidaymakers from elsewhere. No German visitors and only a few visitors form Sweden have seen the mentioned promotional material.

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 and the nature of the island, and the lowest in specific activities such as fishing and golf courses. This was true of all holiday markets (Table 24), with 84% of Danish visitors and 93% of those from Germany assessing the nature of the island

as ‘Very important’ in their decision to visit. The atmosphere on the island is also important: some 70% of all the visitors to Bornholm mentioned the atmosphere as ‘Very important’.

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;
- Changes, to experience something new, curiosity, interested..

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

As child Base: Repeat Visits	Denmark 133	Sweden 39	Other 20 [1]	All 200
No	41	62	71	50
With family/friends	21	21	21	21
With school	21	5	4	16
With family/school	12	10	0	11
With club/association	1	3	4	2
With above combinations	3	0	0	0

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

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

As child Base: Repeat Visits	Business 54	Holiday 59	Holiday/VFR 33	VFR solely 30	Other 18[1]
No	41	59	49	33	61
With family/friends	17	17	24	37	17
With school	28	17	9	3	11
With family/school	11	3	18	17	11
With club/association	2	3	0	0	0
With above combinations	2	0	0	10	0

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

Table 21 **Finding Out about Bornholm** **Percentages**

Information Source Base: Holidaymakers [1]	Denmark 184	Sweden 34	Germany 44	Other 19[3]	First Visit 42	Repeat Visit 237
Always known	30	47	27	11	26	31
Newspaper/ magazine ad.	3	12	11	11	17	3
Poster	1	3	11	11	9	1
Newspaper/ magazine article	1	12	2	5	7	1
Travel agent	0	0	5	16	9	*
Club/association	2	6	0	5	2	1
Family/friends	8	12	64	63	57	15
Guide book/brochure	11	0	14	11	15	1
TV Ad. or programme	1	0	2	11	5	1
Radio	1	0	0	5	0	1
Travel show/ exhibition	1	0	0	0	0	*
Other	3	3	0	0	0	3

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. Small sample size and should be used with caution.
4. * means less than 0.5%

Table 22 **Seen Bornholm Promotion** **Percentages**

Media Base: Holidaymakers [1]	Denmark 184	Sweden 34	Germany 44	Other 19 [3]	First Visit 42	Repeat Visit 237
Danish Tourist Board brochure	28	3	0	32	17	3
Newspaper/magazine article	48	0	0	32	15	9
Bornholm 95 brochure	9	6	0	47	17	3
Danish TB newsletter [2]	12	3	0	5	2	3

Notes: 1. Includes holidays only, holidays and VFR, and holidays plus other reasons for the visit.
2. Danish questionnaire only.
3. Small sample size and should be used with caution.

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

Features Base: Holidaymakers [1] (282)	Very Important Score 4	Important Score 3	Less Important Score 2	Unimportant Score 1	Average Score
Beaches	36	26	26	12	2.86
Landscape	78	18	2	2	3.72
Cycle routes	30	20	19	31	2.51
Walking	43	30	19	8	3.09
Fishing towns	54	30	11	6	3.31
Nature	85	12	1	3	3.78
Golf courses	3	3	15	80	1.28
Fishing	10	6	17	67	1.60
Cultural history	28	45	20	7	2.95
Restaurants	17	32	30	21	2.45
Craft/art workers	23	40	30	7	2.79
Atmosphere	70	23	5	2	3.61
Variety of activities	11	30	35	24	2.29

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: Holidaymakers [1]	Denmark 184	Sweden 34	Germany 44	Other 19 [2]	All 281
Beaches	11	21	30	26	16
Landscape	24	26	78	79	37
Cycle routes	5	18	34	37	13
Walking	11	12	43	47	18
Fishing towns	15	24	48	53	24
Nature	28	29	89	79	41
Golf courses	1	3	0	0	1
Fishing	2	9	2	21	4
Cultural history	7	18	25	26	12
Restaurants	3	24	9	16	7
Craft/art workers	6	12	16	32	10
Atmosphere	21	38	73	42	3
Variety of activities	2	12	2	21	5

Notes: 1. Includes holidays only, holidays and VFR, and holidays plus other reasons for the visit.
2. Small sample size and should be used with caution.

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 they were more likely to make their own arrangements than use a travel intermediary either by purchasing a package tour or going to a travel agent (Table 25). Danish visitors, visitors from other countries but Denmark and Germany and those on a repeat trip, mostly organised their own holiday (73%, 70% and 76% respectively). Domestic visitors and those who have been before, plainly benefit from greater familiarity of the product, while those from Germany 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 and visitors from other countries but Denmark and Germany tend to book directly, while German visitors are more likely to use a travel agent or a tourist information centre on the island.

3.3 The Danish and Swedish visitors do not use the 7 tourist information centres on Bornholm much. German visitors are generally the largest users of the tourist information network. The centres at Rønne and Allinge are used by 38% of the German visitors.

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

Booking arrangements Base: Holidays	Denmark 66	Germany 42	Other 33[1]	First Visit 37	Repeat Visit 103
Organised by myself	73	48	70	32	76
Package tour	15	14	6	27	8
Travel Agent	9	38	21	38	15
Club/association	3	0	3	3	2

Note: 1. Includes Sweden.

Table 26 **Accommodation Booking Patterns by Country** **Percentages**

Booking arrangements Base: All visitors in paid accommodation	Denmark 60	Germany 36	Other 22[1]
Booked it myself	57	19	50
Travel Agent	23	31	18
Bornholm Tourist Office	0	39	18
Summer house booking office	8	11	10
Through work	8	0	0
Club/association	2	0	0
Chance	0	0	5
Other	2	0	0

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

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

Booking arrangements Base: All visitors in paid accommodation	Business 34	Holiday 70	All 118
Booked it myself	61	34	44
Travel Agent	27	24	25
Bornholm Tourist Office	0	24	15
Summer house booking office	3	13	9
Through work	6	3	4
Club/association	0	0	1
Chance	0	1	1
Other	3	0	1

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

Information Centre Base: All Visitors	Denmark 181	Sweden 32	Germany 34	All 263
Aakirkeby	3	0	23	5
Gudhjem	3	0	11	4
Hasle	2	3	7	3
Nexø - Dueodde	5	0	23	7
North Bornholm, Allinge	4	0	38	9
Rønne	6	9	38	11
Svaneke	3	7	11	5

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 and Swedish 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. German tourists were nearly five times as likely to use summer houses than Danish visitors, and, similarly, first time visitors were nearly four times as likely to use summer houses than those who had been to Bornholm before. Some 29% of first time visitors stayed in a hotel while 18% of visitors who had been on the island before stayed in a hotel (Table 29).

4.2 For people travelling to Bornholm on business, 69% used hotels (Table 30), while for those coming purely for holiday purposes only 19% 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.

4.3 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.

4.4 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 and visitors from other countries but Denmark and Germany. German visitors do demonstrate some recognition that prices are on the high side (Table 38). There is, however, some recovery of this situation when overall value for money is considered in Table 40. It is to be noted that visitors who have been on Bornholm before produce lower scores for quality of food and beverages (Table 34), quality of service (Table 36) and value for money (Table 40) than first time visitors.

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

Accommodation Base: All Staying Visitors [1]	Denmark 216	Sweden 21[2]	Germany 45	Other 19[2]	First Visit 42	Repeat Visit 249
Hotel	17	38	18	32	29	18
Guesthouse/Pension	0	5	0	0	0	*
B & B/Private Home	*	0	2	0	0	1
Farmhouse	*	0	4	0	5	*
Youth Hostel	*	0	0	0	0	0
Holiday Centre	4	0	7	0	10	3
Friends and Relatives	60	48	13	26	2	57
Summer House	9	5	49	37	45	12
Camping	0	0	2	0	2	0
Caravan	0	0	2	5	5	0
Other	8	5	2	0	2	7

Notes: 1. The base includes multiple accommodation use.
2. Small sample size and should be used with caution.
3. * means less than o.5%

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

Accommodation Base: All Staying Visitors [1]	Business 42	Holiday 88	Holiday/VFR 62	VFR 71	Other 27[3]	All 290
Hotel	69	19	6	0	30	20
Guesthouse/Pension	0	1	0	0	0	*
B & B/Private Home	0	1	2	0	0	1
Farmhouse	2	2	0	0	0	1
Youth Hostel	0	0	0	0	0	0
Holiday Centre	0	11	3	0	0	4
Friends and Relatives	12	6	77	99	59	50
Summer House	7	47	5	0	7	19
Camping	0	1	0	0	0	*
Caravan	0	2	0	0	0	1
Other	10	9	6	1	4	6

Notes: 1. The base includes multiple accommodation use.
2. * means less than 0.5%
3. Small sample size and should be used with caution.

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

Evaluation	Accommodation	Food and beverages	Service	Price level	Overall value for money
Base: All Visitors	**89**	**93**	**43**	**93**	**101**
Excellent	54	48	61	38	33
Good	32	39	26	38	50
Average	11	13	14	19	15
Not good enough	1	0	0	4	1
Poor	2	0	0	1	2
Average score[1]	4.34	4.36	4.47	4.07	4.10

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

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

Evaluation	Denmark	Germany	Other	First Visit	Repeat Visit
Base: All Visitors	**55**	**18[2]**	**16[2]**	**23[2]**	**64**
Excellent	56	28	75	52	55
Good	24	61	25	30	31
Average	16	6	0	13	11
Not good enough	2	0	0	0	2
Poor	2	6	0	4	2
Average score[1]	4.31	4.06	4.75	4.26	4.36

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

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

Evaluation	Business	Holiday	All
Base: All Visitors	**31**	**42**	**88**
Excellent	68	48	55
Good	19	36	31
Average	13	12	11
Not good enough	0	2	1
Poor	0	2	2
Average score[1]	4.55	4.24	4.34

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 45	Germany 32	Other 16[2]	First Visit 30	Repeat Visit 61
Excellent	51	25	88	47	49
Good	33	63	6	47	34
Average	16	13	6	7	16
Not good enough	0	0	0	0	0
Poor	0	0	0	0	0
Average score[1]	4.36	4.13	4.81	4.40	4.33

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

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

Evaluation Base: All Visitors	Business 29[2]	Holiday 50	All 92
Excellent	62	38	49
Good	21	52	38
Average	17	10	13
Not good enough	0	0	0
Poor	0	0	0
Average score[1]	4.45	4.28	4.36

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

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

Evaluation Base: All Visitors	Denmark 30	Other 13[2]	First Visit 10[2]	Repeat Visit 33
Excellent	50	85	70	58
Good	30	15	20	27
Average	20	0	10	15
Not good enough	0	0	0	0
Poor	0	0	0	0
Average score[1]	4.30	4.85	4.60	4.42

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

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

Evaluation Base: All Visitors	Holiday 18[2]	Other 25[2]	All 43
Excellent	72	52	61
Good	22	28	26
Average	6	20	14
Not good enough	0	0	0
Poor	0	0	0
Average score[1]	4.67	4.32	4.47

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

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

Evaluation Base: All Visitors	Denmark 58	Germany 22[2]	All 93	First Visit 25[2]	Repeat Visit 66
Excellent	45	14	38	32	41
Good	29	68	38	52	30
Average	26	5	19	8	24
Not good enough	0	9	4	4	5
Poor	0	5	1	4	0
Average score[1]	4.19	3.77	4.06	4.04	4.08

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

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

Evaluation Base: All Visitors	Business 30	Holiday 47	All 92
Excellent	47	26	38
Good	30	47	37
Average	23	17	20
Not good enough	0	9	4
Poor	0	2	1
Average score[1]	4.23	3.85	4.07

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

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

Evaluation	Denmark	Germany	All	First Visit	Repeat Visit
Base: All Visitors	**52**	**35**	**101**	**35**	**64**
Excellent	44	11	33	31	34
Good	37	71	50	54	45
Average	15	17	15	14	16
Not good enough	2	0	1	0	2
Poor	2	0	2	0	3
Average score[1]	4.19	3.94	4.10	4.17	4.06

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

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

Evaluation	Business	Holiday	All
Base: All Visitors	**28**[2]	**59**	**100**
Excellent	46	24	33
Good	39	58	49
Average	14	14	15
Not good enough	0	2	1
Poor	0	3	2
Average score[1]	4.32	3.97	4.10

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

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 attraction for all visitors are Hammershus Castle. The percentages shown in these tables are estimates of the visitor market penetration rate of each listed attraction during the period October - December 1995. As would be expected, those visitors coming solely for holiday purposes have a higher propensity to visit attractions than others. The greater part of the visitors from German are on holiday.

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

5.3 Museums are generally not well attended (Tables 46 and 47), the only exception being the Art Museum and the Bornholms Museum among German visitors and visitors from other countries but Denmark and Germany (Table 46). The German tourists 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). Once again the tourists from Germany are more likely to visit the attractions (Table 48).

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. Other attractions recorded by visitors, but only for very small numbers, were Døndalen, Dueodde, Almindingen, Rø Plantation and Hasle maritime.

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

Attraction Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[1]
Hammershus Castle	20	18	78	67
Hammershus exhibition	5	4	9	10
Østerlars round church	11	10	57	38
Other churches	8	4	43	33

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

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

Attraction Base: All Visitors	Business 84	Holiday 117	Holiday/VFR 70	VFR 84	Other 36	All 391
Hammershus Castle	15	53	23	11	28	28
Hammershus exhibition	2	10	3	5	0	5
Østerlars round church	6	36	14	2	19	17
Other churches	2	32	6	7	3	13

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

Attraction Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[2]
Christiansø	2	8	11	10
Gardens	*	0	9	5
Randkløve Skaar	2	0	7	5
Paradisbakkerne	9	2	26	33
Ekkodalen	8	4	30	10
Rytterknægten	8	2	24	10
Helligdomsklipperne	12	8	52	29
Jons Kapel	9	4	43	33

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

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

Attraction Base: All Visitors	Business 84	Holiday 117	Holiday/VFR 70	VFR 84	Other 36	All 391
Christiansø	0	9	1	1	6	4
Gardens	1	2	1	0	0	2
Randkløve Skaar	0	6	0	2	8	3
Paradisbakkerne	6	23	7	7	8	9
Ekkodalen	6	24	1	4	6	10
Rytterknægten	2	16	7	7	8	9
Helligdomsklipperne	6	38	4	10	11	17
Jons Kapel	2	15	12	7	6	14

Table 46 Visits to Museums by Country Percentages

Attraction Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[1]
Bornholms Art Museum	9	10	22	19
Bornholms Museum	3	0	22	19
Gudhjem Museum	0	0	4	5
Nexø Museum	1	0	9	10
Martin Andersen Nexø Museum	*	2	0	0
Defence Museum	1	0	4	0
Quarry Museum	1	2	7	5
Farm Museum	3	2	13	5
Automobile Museum	1	0	7	5
Erichsens Gaard	1	0	7	5

Notes: 1. Small sample size and should be used with caution.
2. * means less than o.5%

Table 47 Visits to Museums by Purpose Percentages

Attraction Base: All Visitors	Business 84	Holiday 117	Holiday/ VFR 70	VFR 84	Other 36	All 391
Bornholms Art Museum	7	20	9	7	6	11
Bornholms Museum	1	12	7	4	0	6
Gudhjem Museum	0	5	1	0	0	1
Nexø Museum	0	3	4	1	0	2
Martin Andersen Nexø Museum	0	2	0	0	0	1
Defence Museum	0	2	1	0	1	1
Quarry Museum	4	3	0	2	0	2
Farm Museum	1	6	4	5	0	4
Automobile Museum	0	6	1	1	0	2
Erichsens Gaard	0	3	1	1	3	2

Table 48 Visits to Craft and Other Attractions by Country Percentages

Attraction Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[1]
Glass factory/shop	16	8	61	43
Ceramic factory/shop	5	10	26	24
Art galleries	2	2	22	14
Brændesgårdshaven	2	2	4	10
Fish smoke house	15	14	65	29
Zoo	4	4	15	0
A lighthouse	6	0	32	29

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

Table 49 Visits to Craft and other Attractions by Purpose Percentages

Attraction Base: All Visitors	Business 84	Holiday 117	Holiday /VFR 70	VFR 84	Other 36	All 391
Glass factory/shop	10	40	21	8	19	21
Ceramic factory/shop	4	21	7	5	0	9
Art galleries	1	12	4	2	0	5
Brændesgårdshaven	0	5	0	4	3	3
Fish smoke house	12	45	14	5	17	21
Zoo	1	9	3	4	6	5
A lighthouse	1	22	7	4	3	10

Table 50 Global Evaluation of Attractions

Attraction Group Base: All Visitors	Excellent Score 5	Average Score	Range[1]
Heritage Attractions	61%	4.50	4.32 - 4.67
Museums	62%	4.54	4.13 - 5.00
Natural Attractions	65%	4.50	4.27 - 4.75
Craft and other Attractions	47%	4.29	4.00 - 4.41

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 activity was going to the beach (Tables 51 and 52). Swimming in the sea or in a pool were also popular, particularly for the German tourists (Table 51).

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 very small.

6.3 Many leisure tourists are compulsive shoppers, so it is not surprising that shopping is an relatively important activity, particularly for the German tourists and those coming solely for holidays and holidays combined with visiting friends or relatives (Tables 55 and 56). Secondly, given that there is a considerable amount of self-catering amongst German tourists and 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 tourists and the tourists from other countries but Denmark, Sweden and Germany (Table 57).

6.5 General Recreational Activities and Waterside Activities generated a high level of satisfaction and (Table 59).

6.6 Other activities recorded by visitors, but only for very small numbers, were horseriding and bowling.

Table 51 Participation in Water Based Activities by Country Percentages

Activity Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[1]
Going to the beach	9	10	26	14
Swimming in the sea	3	4	17	0
Swimming in the pool	2	0	13	19
Windsurfing	0	0	0	0
Boat trips	1	2	9	5
Fishing	2	0	0	5

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

Table 52 Participation in Water Based Activities by Purpose Percentages

Activity Base: All Visitors	Business 84	Holiday 117	Holiday/VFR 70	VFR 84	Other 36	All 391
Going to the beach	6	19	10	7	11	11
Swimming in the sea	2	8	3	1	3	4
Swimming in the pool	2	9	3	1	0	4
Windsurfing	0	0	0	0	0	0
Boat trips	0	6	0	2	3	3
Fishing	1	2	3	0	3	1

Table 53 Participation in Specific Activities by Country Percentages

Activity Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[1]
Scenic air flight	1	0	2	0
Golf[1]	*	2	0	0
Horseracing	*	0	4	5

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

Table 54 Participation in Specific Activities by Purpose Percentages

Activity Base: All Visitors	Business 84	Holiday 117	Holiday/VFR 70	VFR 84	Other 36	All 391
Scenic air flight	1	1	0	0	0	1
Golf[1]	0	1	0	0	1	1
Horseracing	0	3	0	0	0	1

Table 55 Participation in Entertainment Activities by Country Percentages

Activity Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[1]
Music recitals	*	2	7	0
Going to the cinema	2	0	2	0
Eating out	15	10	43	14
Shopping	18	28	48	43

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

Table 56 Participation in Entertainment Activities by Purpose Percentages

Activity Base: All Visitors	Business 84	Holiday 117	Holiday/VFR 70	VFR 84	Other 36	All 391
Music recitals	0	3	1	0	3	1
Going to the cinema	1	0	1	2	3	1
Eating out	10	28	11	8	31	17
Shopping	10	34	33	18	19	24

Table 57 Participation in General Recreational Activities by Country Percentages

Activity Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[1]
Cycling	5	10	28	24
Guided coach tour	1	4	0	5
Guided walks	2	2	7	10
Walks on my/our own	18	6	54	43
Just relaxing	23	16	57	38
Driving around	24	8	57	48

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

Table 58 Participation in General Recreational Activities by Purpose Percentages

Activity Base: All Visitors	Business 84	Holiday 117	Holiday/VFR 70	VFR 84	Other 36	All 391
Cycling	6	15	9	5	8	9
Guided coach tour	4	0	1	0	0	1
Guided walks	5	4	1	0	3	3
Walks on my/our own	6	33	25	20	14	21
Just relaxing	5	36	46	25	14	27
Driving around	7	38	37	21	25	27

Table 59 Global Evaluation of Activities

Activity Group Base: All Visitors	Excellent Score 5	Average Score	Range[1]
Waterside Activities	64%	4.54	4.12 - 4.65
Specific Activities	50%	4.50	4.25 - 4.67
Entertainment	49%	4.28	2.78 - 4.50
General Recreational Activities	76%	4.79	4.50 - 4.90

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 and holidaymakers 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 96%, amongst the German visitors and those coming on holiday combined with visiting friends and relatives (Table 60).

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

Transport Base: All Visitors [1]	Denmark 268	Sweden 44	Germany 45	Other 19 [2]	First Visit 45	Repeat Visit 323
Public Bus	18	14	11	16	7	18
Coach Tour	4	11	0	0	2	5
Taxi	13	11	0	0	0	13
Car	78	36	96	95	91	65
Motorbike	*	0	0	0	0	*
Bicycle	13	18	38	32	27	15
On foot	29	34	62	42	47	32
Other	*	0	2	0	2	*

Notes: 1. Percentages will add up to more than 100% because of multiple use.
2. Small sample size and should be used with caution.
3. * means less than 0.5%

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

Transport Base: All Visitors [1]	Business 77	Holiday 109	Holiday/VFR 67	VFR 80	Other 35	All 368
Public Bus	13	13	15	16	34	16
Coach Tour	8	4	0	1	14	4
Taxi	30	3	6	10	11	11
Car	55	75	96	85	71	76
Motorbike	0	0	1	0	0	*
Bicycle	10	25	19	9	20	17
On foot	13	43	46	31	34	34
Other	1	1	0	0	0	1

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

8. VISITOR EXPENDITURE

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

Findings

8.1 Visitors from Germany and other countries but Denmark, Sweden and 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 or other countries but Denmark, Germany and Sweden record the highest daily spending (Table 63). It is to be noted that only a few respondents is from 'other countries´. Expenditure tends to be higher on a package tour, at an average of DKK 2.465 per person per trip, than for those travelling under their own arrangements, at an average of DKK 1.599 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 759 per person if travelling independently (Table 65).

Table 62 Expenditure per Person per Trip by Country DDK

Country Base: All Visitors	Independent 293	Inclusive 18[1]	All 308
Denmark	1.325	1.652	1.340
Sweden	1.099	1.918	1.114
Germany	2.793	3.230	2.853
Other[1]	2.591	5.000	2.674
All	1.599	2.465	1.648

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 293	Inclusive 18[1]	All 308
Denmark	267	312	270
Sweden	383	1.119	388
Germany	338	491	360
Other[1]	339	5.000	352
All	295	455	303

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 293	Inclusive 18[1]	All 308
Business	2.300	-	2.300
Holiday	2.223	2.494	2.227
Holiday/VFR	1.542	837	1.516
VFR	924	-	924
Other	1.165	3.337	1.370

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

Table 65 Expenditure per Person per Day by Purpose DDK

Country Base: All Visitors	Independent 293	Inclusive 18[1]	All 308
Business	759	-	759
Holiday	307	421	317
Holiday/VFR	260	209	259
VFR	201	-	201
Other	307	890	349

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 foreign visitors (Table 67): relatively few people from Germany and other countries but Denmark, Sweden and 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). But when value for money is considered, the average scores fall remarkable across all categories (Table 69). People travelling on business are more critical than those on holiday and visiting friends and relatives.

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 five most frequent suggestions for improving the island are:

- Extend tourist season;
- Cheaper transport;
- Bornholm must be kept as it is;
- Better value for money;
- More and cheaper departures.

Clearly, some 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 five most popular remarks on what visitors like about Bornholm are:

- The landscape and nature;
- Local hospitality and friendliness;
- Clean and nice island;
- Quiet and harmonious, with a good atmosphere, and nice that Bornholm is a small island;
- Everything works (*in a tourism sense*), don't change it.

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 the danger of too many tourists spoiling the product. Beyond this, there are a whole series of individual dislikes that relate to the personal experiences of the respondent. These range from unfriendly staff in some tourist businesses, bad conditions for the animals in zoo, the nature starts getting poluted to poor traffic safety, to mush roadmaking. 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). As would be expected, about 86% 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. Some 64% of visitors who have been on the island before mentioned that they were either certain or likely to return next year, whereas 21% 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 as expected most likely to come again next year (Table 73).

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

Evaluation Base: All Visitors	Denmark 243	Sweden 42	Germany 45	Other 19[3]	First Visit 44	Repeat Visit 297
Excellent	74	71	82	84	77	75
Good	23	29	18	11	21	22
Average	3	0	0	5	2	2
Not good enough	0	0	0	0	0	0
Poor	1	0	0	0	0	*
Average score[2]	4.69	4.71	4.82	4.79	4.75	4.72

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

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

Evaluation Base: All Visitors	Denmark 210	Sweden 34	Germany 42	Other 16[2]	First Visit 41	Repeat Visit 257
Excellent	44	27	7	13	24	37
Good	28	32	69	50	61	31
Average	24	27	24	25	10	27
Not good enough	3	12	0	13	5	4
Poor	1	3	0	0	0	2
Average score[1]	4.10	3.68	3.83	3.63	4.05	3.99

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

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

Evaluation Base: All Visitors	Business 65	Holiday 105	Holiday/VFR 66	VFR 73	All other 33	All 342
Excellent	68	88	77	70	64	76
Good	29	11	21	26	33	22
Average	3	1	0	4	3	2
Not good enough	0	0	0	0	0	0
Poor	0	0	2	0	0	*
Average score[2]	4.65	4.89	4.73	4.66	4.61	4.73

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 58	Holiday 93	Holiday/VFR 57	VFR 59	All other 29[1]	All 296
Excellent	29	30	44	44	31	36
Good	40	46	28	24	28	35
Average	21	22	26	29	31	25
Not good enough	7	1	2	2	10	3
Poor	3	1	0	2	0	1
Average score[2]	3.85	4.03	4.14	4.07	3.79	4.00

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 257	Sweden 47	Germany 46	Other 18[1]	First Visit 46	Repeat Visit 313
Certain	65	46	37	39	9	64
Likely	18	35	22	22	33	19
Maybe	14	19	33	39	50	14
Unlikely	4	0	7	0	7	3
Certainly not	0	0	2	0	2	0

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

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

Probability Base: All Visitors	Business 74	Holiday 105	Holiday/VFR 68	VFR 77	All other 34	All 358
Certain	30	38	79	86	62	57
Likely	26	32	13	8	21	21
Maybe	38	25	6	4	18	19
Unlikely	7	4	2	3	0	3
Certainly not	0	1	0	0	0	*

Note: 1. * means less than 0.5%

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

Timing[1] Base: All Visitors	Denmark 274	Sweden 50	Germany 46	Other 21[2]	First Visit 48	Repeat Visit 345
Next year	65	64	37	19	21	64
Next 2 years	9	12	26	10	17	11
Next 5 years	9	2	24	24	29	8

Notes: 1. Answers 'Certain' and 'Likely' only.
2. Small sample size and should be used with caution.

Table 73 Timing of Return by Purpose Percentages

Timing[1]	Business	Holiday	Holiday/VFR	VFR	All other	All
Base: All Visitors	**84**	**117**	**70**	**84**	**36**	**391**
Next year	43	38	80	85	64	59
Next 2 years	14	15	10	5	11	12
Next 5 years	11	21	4	4	5	10

Note: 1. Answers 'Certain' and 'Likely' only.